Towns and Cities as Multifunctional Centres

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Terms of Reference

DAC Beachcroft has commissioned this research to support the shopping centre industry by publishing innovative research about the changing nature of retail, towns, cities and shoppers. The retail property industry is currently in a state of uncertainty, as it is not clear how internet retailing and other macro changes will impact on town and city centres, physical store portfolios and consumer behaviour and expectations. In order to provide to their shopping centre clients with valuable research and intelligence the Institute of Place Management at Manchester Metropolitan University has been commissioned to write two bespoke reports.

a) Towns and cities as multi-functional centres
b) High Street 2050: Profiling the shopper in 35 years

Both reports use a combination of existing literature/studies and unique access to Springboard's[i] UK footfall data as well as the findings from the recent Economic and Social Research Council-funded Project High Street UK2020[ii].

Authors

The reports have been written by an interdisciplinary team of academics and practitioners from the Institute of Place Management[iii].

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[i] Springboard is the leading provider of footfall data across UK towns and cities. http://www.spring-board.info/
[ii] http://www.placemanagement.org/special-interest-groups/place-management/town-and-city-centresdowntowns/town-centre-policy-and-research/hsuk2020/
[iii] We would like to thank David Matthews, of Library and Information Services at MMU, for his help in proof-reading this report

The Institute of Place Management

The Institute of Place Management is the professional body for people involved in making, maintaining and marketing places. As part of Manchester Metropolitan University, the Institute of Place Management is a not-for-profit membership organisation dedicated to supporting *people who serve places* with unbiased research, continuing professional development and networking opportunities.

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Executive Summary

Whilst omni-channel retailing and the digital high street may be two of the latest talking points in the retail property industry, our towns and city centres *have always been shaped* by a series of technological, social and political revolutions. The purpose of this report is to examine how, after many years of *mono-functionality* focused upon retailing, our centres are experiencing something of a renaissance, and remerging as *multi-functional* ones, supporting leisure and recreation, employment, tourism, heritage, culture, housing, employment, education, health and wellbeing as well as retail.

A multi-functional centre means a diverse offer, and, therefore, traditional economic indicators will not, on their own, act as a sensible yardstick of performance or tool for decision-making. For the multi-functional centre, activity levels are the key performance indicators. How much is the centre used, when and for what? Multi-functional centres draw people in for a much wider 'bundle of benefits' than just shopping. This requires all stakeholders to work together much more effectively to deliver *a better collective experience* in locations, to the commuter who may want to choose and collect at different times of the day, depending on their personal transport options and shift patterns, to the carer who may want to combine exercise and top-up shopping near to reliable respite care.

Many of the newfound uses for underused or redundant retail space have resulted from structural changes in the retail sector, as well as from a more tightly gripped public purse. This has opened up the possibility for much more community involvement in the redevelopment and reuse of space. Sometimes this influx of creativity is only temporary, but it still demonstrates what an important asset an engaged community can be to a place, and what a difference it can make to vitality and viability. We think the retail property sector should work harder to integrate more local entrepreneurship and civic practice into both the development of new centres and the management of existing ones. The successful multi-functional centre will have both a *multitude of users* as well as a *multitude of caretakers.* Most of all, our report argues that all retail developments (both new and existing) have to integrate more effectively into the overall offer of the multi-functional centre. Decision making and management must become less hierarchical and myopic and more place-based and 'porous' to allow more intelligence and input from the location.

The multi-functional centre renaissance: Forces of transformational change

Although both the retail and retail property industry are currently debating the changes that multi-channel retailing will bring, Internet retailing is certainly not the first innovation to come along and reconfigure retail and retail-related sectors. Historically, many other advances have had a significant impact on the location and operation of retail from the introduction of formal markets in Europe almost 1000 years ago[1], to technological inventions such as the domestic refrigeration unit. Likewise, the recent shift from off-line to on-line channels follows other structural changes in retailing, such as the post 1970s shift from in-town to out-of-town provision. Subsequently, these changes are not only affecting retailers and retail property owners, but are also constantly reshaping towns and cities visually, structurally, politically, and economically.[2,3,4,5]

The aim of this section is to briefly identify truly transformative factors of long-term change, and discuss how these are impacting upon town and city centres and making many of them more multi-functional.

Population changes

Changes in population are by far the most important factor that shifts the location of retailing and therefore changes the form and function of our towns/cities[6]. For example, post-war suburbanisation of residential life led to the restructuring of the marketplace and retailing, with the advent of the first suburban shopping centres in the mid-50s in the US[7], a phenomenon that appeared in Western Europe a decade or so later[8]. The considerable popularity of suburban shopping centres, coupled with the increase in car usage, led to the decline of city centres and in-town retailing during the 60s and 70s[9,10], a phenomenon that is still evident in many town centres. City centre decline gave rise to anti-urban mythologies of crime and disorder and solidified the suburbs and the countryside as a more pleasant place to live than the city[11].

However, a new wave of urbanisation began around 20-25 years ago, when populations returned to regenerated and gentrified city centre areas, perceived as attractive, vibrant, and cultural places to be living and working in[12,13]. More relaxed planning legislation and neoliberal policies have allowed cities to attract investment and design urban strategies for housing, retailing, and office developments that have restructured centres and peripheral areas around them[14,15], through multi-functionality. The redesign and rebuilding of the traditional retail centres has led to more walkable, safe, comfortable, and interesting environments[7] that have allowed city centres to compete with retail parks and suburban shopping centres[16].

In demographic terms, the constant increase in the proportion of older people in society has been evident for the last 50 years and is well documented in research and reports[2,17,18]. People are generally becoming healthier and more active, and it is projected that the proportion of people aged 65+ will rise from 17.7% currently to 23.5% in 2034[19,20]. Those over the age of 65 are also becoming more techno-savvy (silver surfers), which follows the

overall population trend, with figures in Internet access (41%) mobile phone ownership (more than 75%) and smartphone ownership (34%) constantly increasing in ages 65+[21,22]. It is also not surprising that this mass society of healthy and active mature adults[23] is constantly increasing the overall population; for the UK, it is expected that its population will be 73m in 2035[24]. Lower birth rates, longer life expectancy and the sheer size of the baby-boomer generation are solidifying mature adults as the group that drives developments in retailing, as it is estimated that two-thirds of the retail spend growth will stem from mature adults in the next 10 years[25]. These figures indicate that it is essential for retailers to cater for this group in the future, through better access to retail services, and the development of niche markets and retail formats that accommodate mature adults' lifestyles and consumer preferences, such as wellness services, restaurants, entertainment services, cafés, high class products stores, and good store and car parking facilities[26,27]. However, changes in retail structure and town and city centres are not only bound to sociodemographic changes. In fact, these changes are the basis for much wider lifestyle, economic, and technological developments that have driven various changes in retail hierarchies throughout the years[28].

Convenience culture, car ownership and the Internet

Much of retailing has always been about convenience. An editorial from 1892 in American Grocer pinpoints that, "people do not like to have to go into six different shops for six different articles; they prefer to buy the lot at one shop" (as cited in Hollander 1966; page 31)[29]. There are three main components of convenience: 1) time 2) physical energy and 3) mental energy[30,31]. Minimization of effort from both firms and consumers was attributed as the main factor of central place location in the 1920s and 1930s, which resulted in retail agglomerations in town centres and High Streets based on the market potential and commercial attraction of these central locations[32,33,34]. These developments were also coupled with retailers' attempts to establish competitive advantage by introducing home delivery services and better prices, as evidenced by early supermarkets.[35,36]

In the 1950s and 1960s, suburban development, increasing incomes, but most importantly the constant rise of car ownership, drastically changed people's perceptions of convenience[37]. Since then, auto-mobility has dominated the way both car-users and non-car users organize their lives[38], and has also dramatically altered our towns and cities. The one-stop weekly shopping trip, with focus on bulk-buying, competitive pricing and ease of parking, was the main outcome of out-of-town retail developments such as superstores and retail parks[39,40,41,42]. In-town centres have since struggled to compete with out-of-town developments, as traffic congestion, older retail environments, non-family friendly spaces, lack of car security, and car parking charges have made town and city shopping centres less attractive[43,44,45,46]. Often, new in-town developments incorporated plans for multi-storey car parks to accommodate the rising needs of car owners[47,48,49,50].

After the dramatic changes to traditional retail centres (the high street) due to out-of-town development, planning restrictions by the UK Government were introduced in an attempt to concentrate future retailing within town and city centres, as well as edge-of-town centres[51]. This move aimed to put a halt to retail decentralization and the creation of food superstores, retail parks and regional shopping centres[16] and reintroduced shopping malls,

convenience stores, and multipurpose shopping trips on the High Street, with a joint focus on convenience and leisure [52,53,54,55,56]. Despite planning regulations and local resistance to new retail formats[57], the last 15-20 years have still witnessed the advent of factory outlets and retail parks[58,59,60], line discounters such as Aldi and Lidl[61] and internet shopping[62]. These transformative changes just reinforce the dynamism of the retail system and have, as always, had an impact on the traditional retail hierarchy[43].

The contemporary expansion of internet shopping during the late 1990s and 2000s has been particularly influential in the development of a new wave of convenience culture, with consumers engaging in e-shopping activities but also using the internet to become more educated, gaining useful information about products, services and prices[63,64]. The direct connection between retailers and consumers via the internet allows constant freedom to both parties to "jump" from one channel to another without them detaching from their previous links, whilst also blending the virtual and the physical place along with their characteristics, services and atmospheres[65]. Therefore, even though the internet continues to apply pressure to high street retailers (due to showrooming and the type of goods sold e.g. clothing, music, travel, books)[66,67], it also allows retailers to coordinate offline and online channels. For example, many have introduced new retail models (e.g. click and collect) and new technologies (3D imaging, interactive tools), as well as gathering valuable information about consumers via social media[14,,68,69,70].
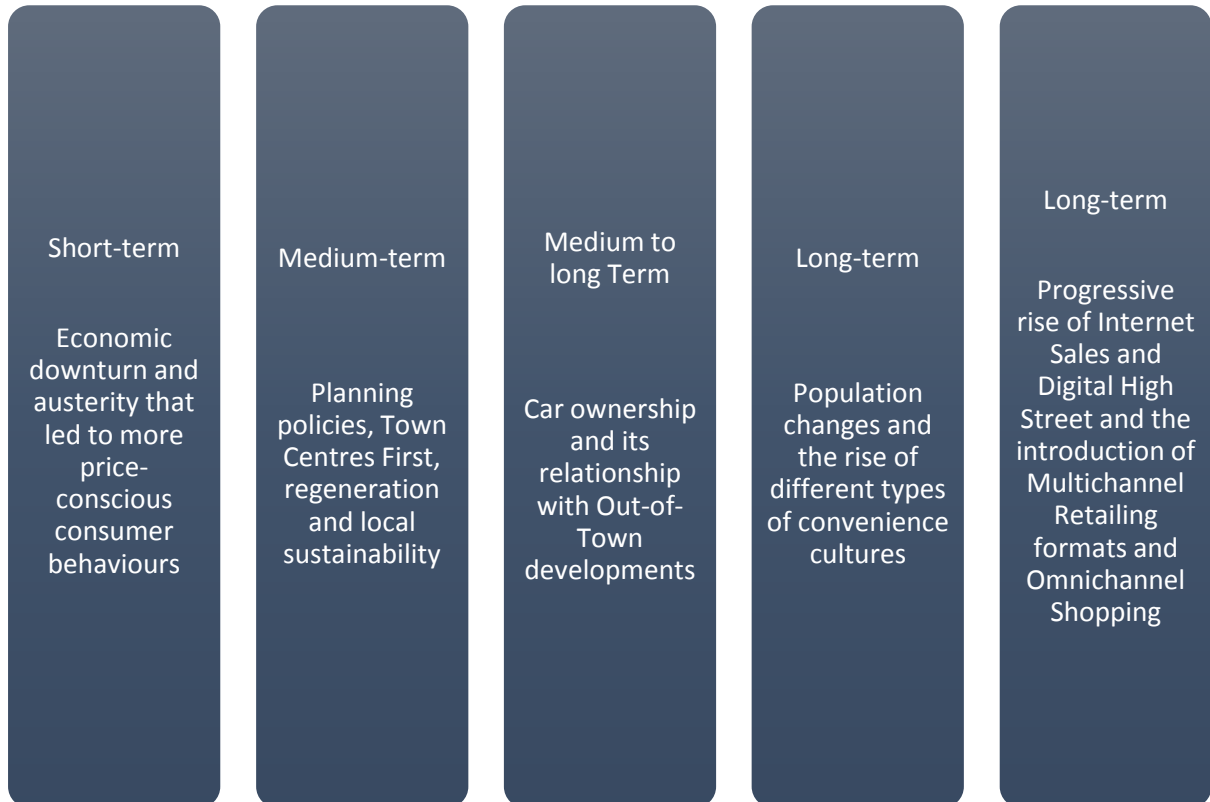
The new era of multichannel retailing, coupled with the increasing techno-savviness of today's consumers poses a great opportunity for retail locations to integrate multiple channels in the shopping experience, and also reassess their store portfolios (e.g. by downsizing and through carrying less stock) and operating costs[71]. The internet phenomenon is still in its prime and will continue to be a major factor of retail change and will force connectivity with the High Street, as 58% of the population now uses a phone to connect to the internet, and 74% of all adults bought goods or services online in 2014, up from 53% in 2008[21].

The new convenience culture is not only technology-driven but also reflects a time-poor, always on the move society, that is more conscious of the local economy and sustainability[72]. In recent years, out-of-town one-stop food shopping has been gradually deteriorating in favour of convenient and frequent local/neighbourhood shopping. Particularly for people in smaller households, frequent top-up shopping is more economic in terms of time, effort, and money spent, so in these times of economic austerity is preferred by an increasing majority of consumers[16]. In addition, embracing vital and viable local shopping is a way of sustaining the local economy, a priority apparent even in recent policies on social exclusion as well as regeneration[73]. In resilient retail centres, independent convenience stores provide a complementary service to supermarkets[74]. Thus, the convenience shop phenomenon has led major corporate firms and independents to develop "top-up" shops in High Streets, to the detriment of bigger hypermarkets and supermarkets, the latter responding by reinventing to include more leisure facilities, non-food, and digital capabilities in order to regain the appeal of consumers[75].

Summary of transformative factors

Our review of the literature has briefly touched on some of the most important factors of transformative retail change that have led to the renaissance of the multifunctional centre. Figure 1 below summarises these forces of change, from the short-term effects of economic downturn several years ago to the long-term effects of population change and internet use [16,70,75].

Short-term	Medium-term	Medium to long Term	Long-term	Long-term
Economic downturn and austerity that led to more price-conscious consumer behaviours	Planning policies, Town Centres First, regeneration and local sustainability	Car ownership and its relationship with Out-of-Town developments	Population changes and the rise of different types of convenience cultures	Progressive rise of Internet Sales and Digital High Street and the introduction of Multichannel Retailing formats and Omnichannel Shopping

Figure 1 Transformative changes driving the renaissance of the multi-functional centre (Based on Grimsey, 2013[30], Wrigley and Lambiri, 2015[16])

Activity levels in multi-functional centres

In this section, we look at *footfall* - an important activity-based measure of performance; and examine the relationship between this and the traditional retail hierarchy in the new, omni-channel environment.

To what extent does the existing retail hierarchy explain activity levels (footfall)? What is the relationship between internet shopping and physical footfall? What other factors explain how busy a location is?

Town centre performance – winners and losers

Internet shopping, which has been hailed as the ultimate level of retail decentralisation[61], along with the economic recession of 2008 and temporally concentrated lease expiry dates, have created the "perfect storm" for retail hierarchy restructuring[76]. Consequently, we see more city and town centres changing their physical presence and adapting to the new technology demands of today's omni-channel consumer in order to achieve a thriving retail market[77]. However, as was the case with out-of-town developments a couple of decades ago[41,55,78], we see that not all centres fare well with this change. Medium-sized traditional town centres in particular are constantly struggling and continue to underperform enduring high vacancy rates, victims from both out-of-town developments, Internet retailing, ecomonic problems, policy restrictions, poor retail diversity, and outdated infrastructures that are irrelevant to today's consumers[79]. What is also evident is the continuous polarisation between north and south; Wrigley and Dolega[3] noted that town centres in the south and the London are most likely to display resilience to the shocks of economic downturn and since then, this resilience has been portrayed in low vacancy rates percentages compared to the northern town centres[79].

Footfall as a measure of performance

As part of our recent High Street UK 2020 project, we have been able to examine the performance of UK town centres thanks to data provided by Springboard, a partner in the project. Springboard monitor footfall in town centres using camera-based technology. Footfall has been recognised as a key indicator of town centre vitality since 1994 when it was incorporated into Government Planning Policy Guidance (then PPG6) in England and Wales as one of the recommended methods of assessing the health and performance of a centre. It was subsequently adopted in Scotland (NPPG8) and Northern Ireland (PPS5).

Springboard provided the High Street UK 2020 project with footfall data from 50 UK towns and cities. This data covered a 36 month period through to the end of 2014 and represented continuous counting 24 hours a day, 7 days a week throughout that period for each centre. In total, it covered half a billion people movements. Not surprisingly, footfall varies through the year. Figure 2 illustrates how footfall changes from month to month using the data from all towns. We have combined three years' data in order to minimise disruption from factors such as weather or events.
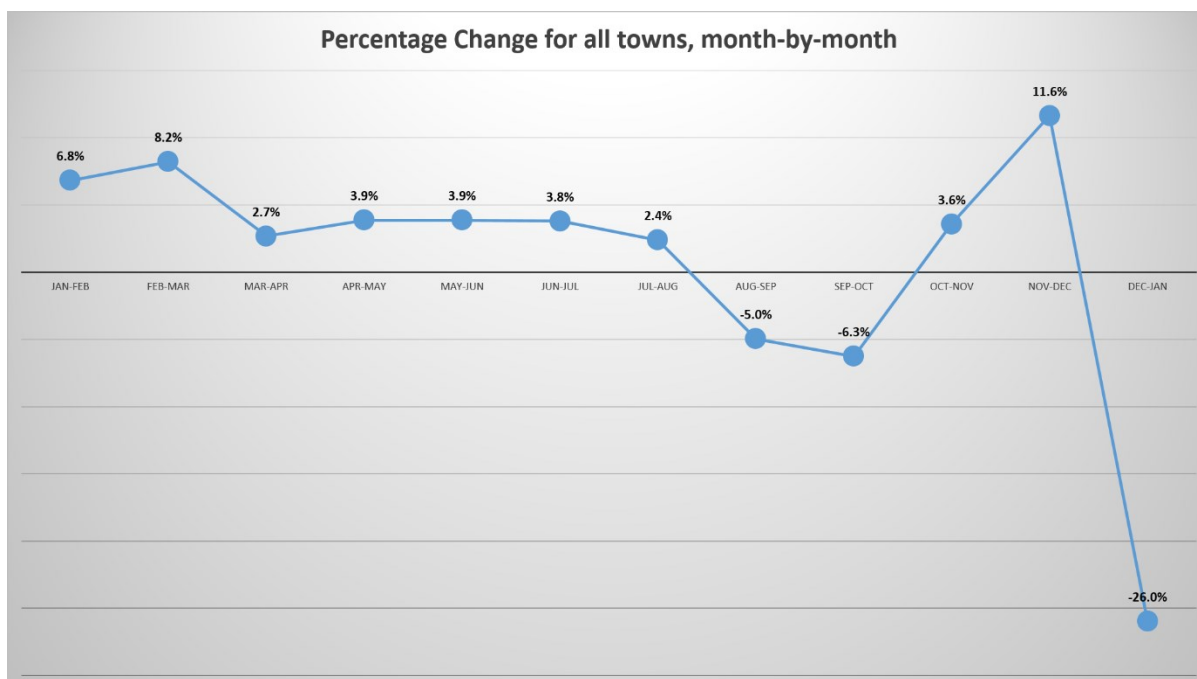
Figure 2 Monthly changes in footfall across UK towns/cities

We have analysed the footfall data in a number of ways and several findings have emerged. Overall footfall in town/city centres is falling, and dropped for the 50 centres in the sample 2.5%, over a 3 year period. If this trend continues, our forecasts show that, for centres as a whole, footfall will fall a further 10% by 2020. There will be variations between towns with some of the Springboard centres even showing rising footfall and some showing stable footfall until 2020. Those centres that are losing most footfall (more than 10% in a 3 year period) are characterised by a catchment in the 100,000 – 300,000 mark. The very largest and very smallest centres, are, generally, showing stable or even increasing footfall.

What is the relationship between footfall and catchment?

Since 2012, the relationship between catchment and footfall has been increasing, with catchment now accounting for 45%[iv] of footfall, across a sample of 50 retail centres[v]. However, the strongest relationship between catchment and footfall is found in the bigger centres (catchment of 600,000+), where 77%[iv] of footfall is explained by catchment. This reinforces previous research[80] that shows retailing is concentrating in larger centres – and, therefore, these centres continue to attract shoppers, in line with existing catchment predictions. At the next 'level' down in the hierarchy (centres with catchment of between 300,000 and 500,000), the relationship between catchment and footfall reduces to 35%[iv]. In the smaller centres in our sample (those with a catchment of 250,000 and under), *the relationship between catchment and footfall was much weaker* – only 16%[iv] of footfall is explained by catchment. Therefore, the traditional retail hierarchy is a good predictor of activity at the very top, but not lower down. Likewise, catchments based purely upon the retail attractiveness of centres does not tell us much about smaller, multi-functional

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[iv] Calculated by linear regression. Figure quoted is an adjusted R Square.
[v] Our sample of 50 retail centres included all types, from regional city centres, such as Birmingham, to local centres, such as Guisborough across England, Wales, Scotland and Northern Ireland.

centres, *which are still attracting significant footfall* – but not on the strength of their multiple retail offer.

What is the relationship between footfall and non-retail spend?

It is important to stress that footfall measures the presence of people and does not reflect spending patterns which will also vary through the year and indeed through the month to some extent. When UK retail regions are ranked by non-food spend, then, again, there is a strong relationship with spend and footfall in the biggest centres. Comparing footfall figures from 2012 across the 50 centres in our sample, with a CACI ranking[81], show the largest centres perform well in both retail non-food spend and footfall. However, there are marked differences, with some centres 'outside' of the CACI top 10 for non-retail spend performing much better, in terms of footfall. For example, Edinburgh is 12 in the CACI ranking, but is in the top 3 centres in terms of GB footfall. In terms of understanding multi-functional centres, places like Edinburgh are important case studies. It is clearly not only non-food retail that is attracting visitors, but how well does the existing shopping provision appreciate this and try and cater for a different type of consumer?

What factors affect the performance of centres?

As previously mentioned, catchment is an important variable that can explain activity levels in centres. As part of our recent High Street UK2020 project we identified 201 factors that impact upon the vitality and viability of retail centres (such as those factors outlined in the first section of this report). We then used a variety of techniques and asked retail and property experts to come up with a ranking. The top 20 factors are listed in Table 1 below.

Table 1 – top 20 factors impacting on vitality and viability of town and city centres

Rank	Factor	Explanation	Importance (as a percentage of retailer representation and accessibility)
1	Retailer representation	Mix of fascias, store sizes, independent and multiples.	100%
1=	Accessibility	Centre accessible by a mix of modes	100%
3	Competition from OOT	Nearby strong retail centre, more accessible by car	99%
4	Convenience	Ease by which centre can be accessed	98%
5	Leadership	Strong, realistic, vision for centre	97%
6=	Opening hours	The hours centre has activity (daytime and evening economy)	96%

6=	Place attractiveness	The collective offer of the centre, including non-retail, may include leisure, transport, employment etc.	96%
8	Area development strategies	Local planning and guidance	95%
9	Supermarket impact	Impact of reliable, in-town supermarkets	95%
10=	Economy	The state of the economy (especially consumer confidence)	95%
10=	Centre size	The size of the centre, usually reflecting its position in the retail hierarchy	95%
12=	Internet retailing	The impact on centres from electronic commerce	94%
12=	Range/quality of goods	The merchandise, assortments, the actual goods sole	94%
14	Sales/turnover	The revenue generated by the centre	94%
15=	Public transport	Reliability, routes and frequency of public transport	94%
15=	Collaboration	The degree to which stakeholders (including retailers) collaborate to improve the collective centre offer	94%
17	Centre management	Improving the centre offer through a recognised coordination function	93%
18	Connectivity	Well connected parts of centre, reduced fragmentation of offer	93%
19=	Retail rents	The relationship between retail rents and centre performance (high performing centres command premium rents).	92%
19=	Location	Spatial location of centre. e.g. centres in SE tend to outperform the rest of the country.	92%

Although retailer representation is top of the list of factors that affect vitality and viability (including footfall), it is important to remember that it is *the collective offer* that is attracting

consumers. Managed shopping centres are one way to improve the collaboration and coordination amongst retail stakeholders, but there are many other important stakeholders that may well be generating attractiveness, such as large employers, busy transport hubs, health and education centres. In fact, understanding the anchors of specific locations is a good way to predict the way in which our retail centres will become multi-functional centres. And those that find ways to coordinate the more diverse multi-functional offer, in a way that offers consumers the experience they are looking for, are likely to be the most successful. We explore these points more fully in the following sections.

Profiling types of towns and cities: Comparison, Holiday, Speciality and Convenience/Community

Figure 2 showed how centres as a whole perform, throughout the year. However, further analysis shows there are significant variations between locations. In fact, the differences in footfall patterns are so marked that different types of centres have very different 'signatures'. For example, Figure 3 shows centres with a strong comparison offer see a notable peak in footfall in November/December as well as a lesser peak around September (in preparation for 'going back to school'). We have termed these "Comparison Shopping Towns. Whilst we are not allowed to identify individual towns in our analysis, Figure 3 is the profile of a regional centre, like Birmingham or Manchester.


Figure 3 Footfall signature of comparison shopping centre

A second distinct type of town, are those that are attractive to tourists and see significant peak building from Easter and into the summer months but which have a relatively weak comparison offer. We have termed these "Holiday Towns". Figure 4 is the profile of towns such as Bournemouth or Warwick.
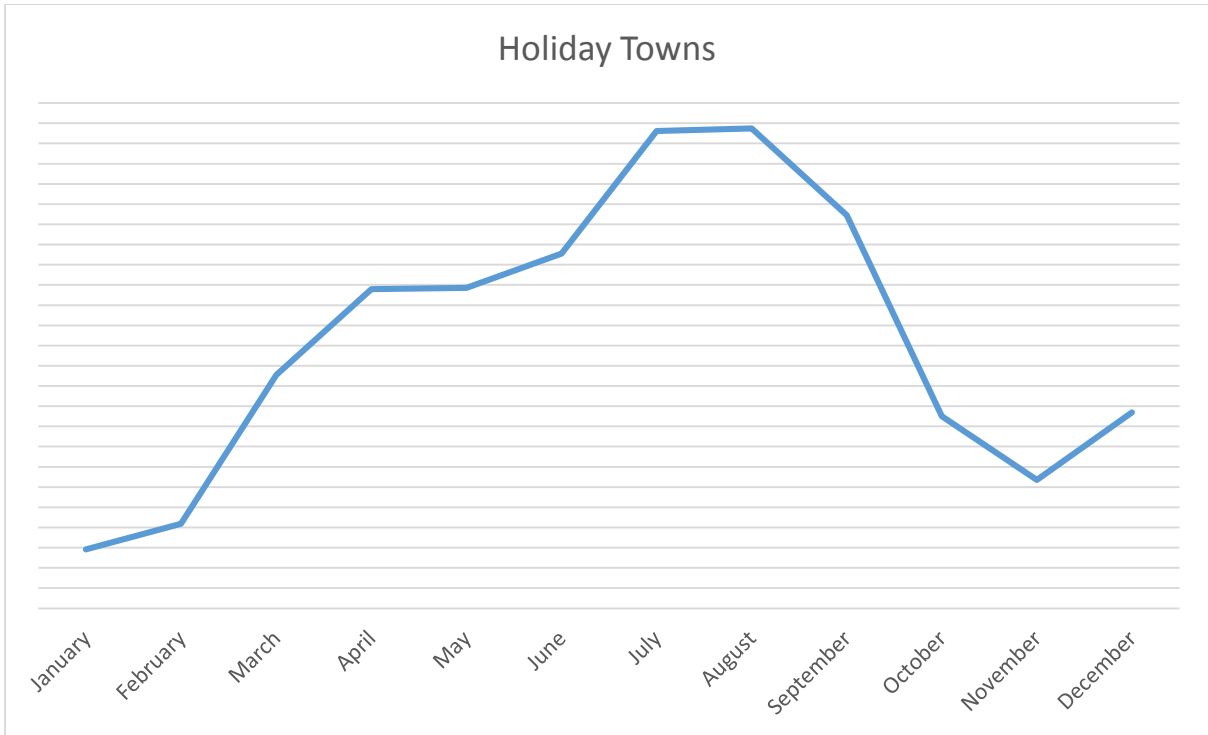
Figure 4 Footfall signature of holiday town

A third type, illustrated in Figure 5 by a cathedral city, sees a peak before Christmas but also enhanced and maintained footfall levels from May to October . These we have termed "Speciality Towns".
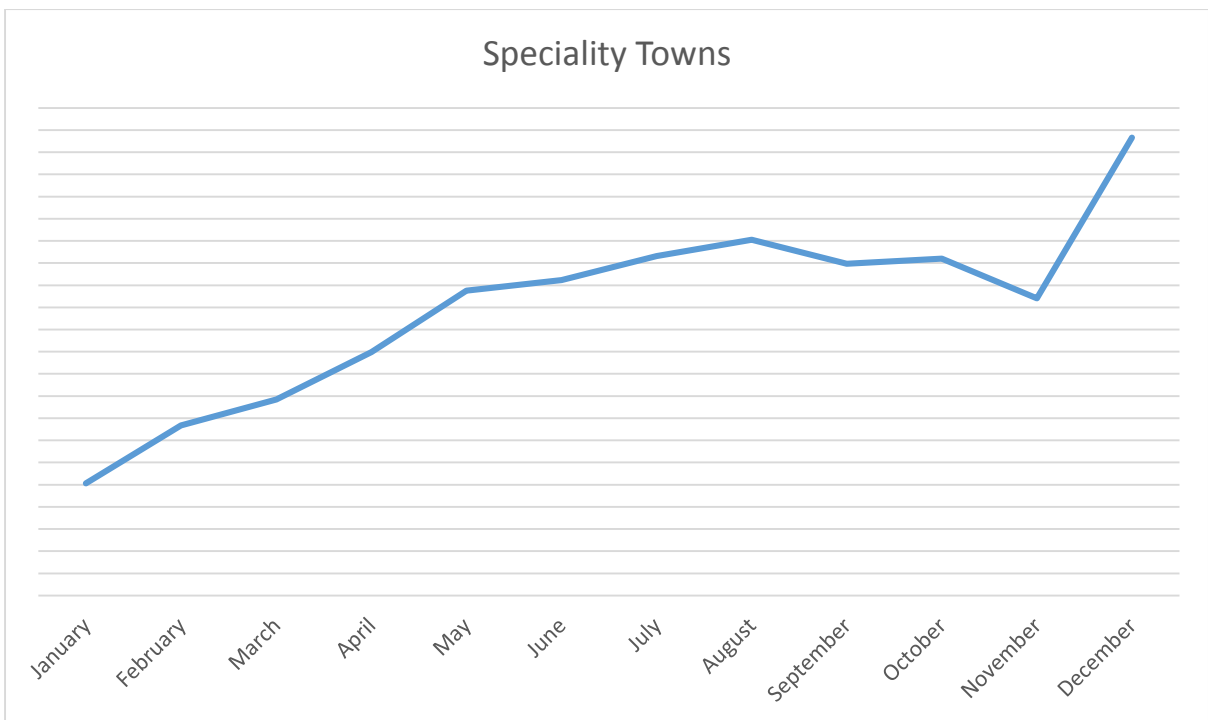

Figure 5 Footfall signature of speciality towns

The data reveals some other variations as well, notably some centres have relatively

consistent footfall throughout the year. These centres, as illustrated in Figure 6, may be smaller and more focused on convenience retailing, or may be larger and serving a well-defined community, such as a market town or even a city. Regardless of their size, their profile is similar, having no monthly upsurges in footfall (and no crashes either!). We have called these convenience and community centres. We think that some of these centres have already adapted to serving the needs of their resident population and, in the case of the larger centres, a well-defined hinterland. We think the more successful centres are repurposing spare retail capacity to other uses, such as employment and residential – as well as having a programme of community-focussed events that attract footfall. This is the profile of centre loyalty, and one, we would think, that would prove attractive to retailer and other operators, in terms of the operational efficiency that can arise from such consistent demand.
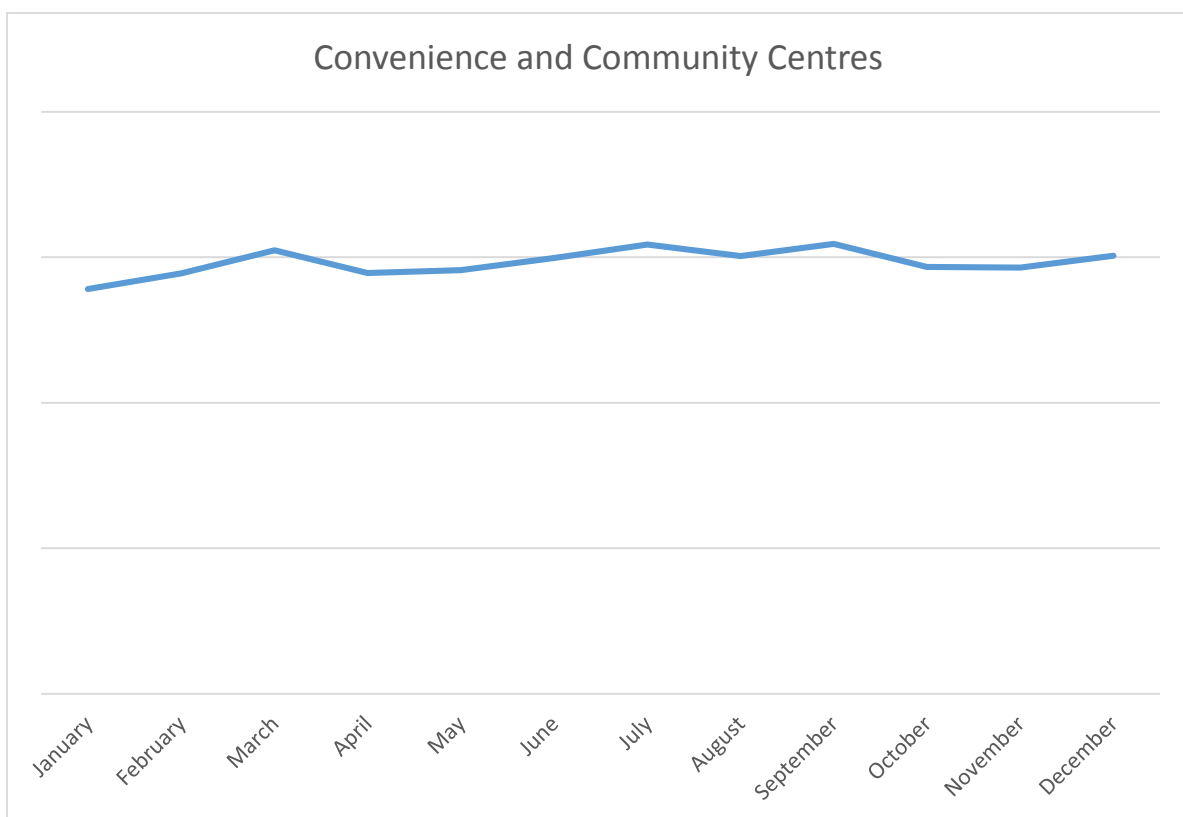
Figure 6 Footfall signature of convenience and community centres

Linking centre type and performance

Through using a statistical technique, called autocorrelation, we can identify more 'robust' patterns in the footfall data. When we apply this type of analysis, not all centres show a clear footfall signature. In fact, in our sample of fifty, about half of the towns did not have a clear, discernible signature. We think these are the centres that are changing from one type of town (usually comparison) to another. This is not usually through choice – this change is a result of a reducing retail offer, rather than a conscious strategy to 'change with the times'.

Towns with a clearer signature performed better than those that do not have a clear signature. The ones with a discernible footfall signature lost, on average, 1.82% of footfall over a 2 year period, compared to ones that did not have a discernible signature, which lost, on average 3.82% of footfall over the same period.[vi]

We believe that towns that consist of stakeholders who know what type of collective footfall signature they have (or should have) will perform better. Naturally, a clearer signature means a clearer offer to consumers, be that comparison, holiday, speciality or convenience/community.

Nevertheless, a completely flat line for a convenience/community centre is not good news, as it does not imply the centre is putting on events, or making the most of its non-retail assets, to build loyalty, or attract anything other than convenience shoppers. Convenience shoppers will easily shop elsewhere, if 'elsewhere' is more convenient. Whilst the overall profile of a convenience/community centre does not vary month by month, by more than about 20% - there are months when events, or other assets (such as proximity to the seaside, or quality public space) are actively used to enhance the centre's attractiveness to the catchment community. The graph below (Figure 7) show the profile of such a centre, which is bucking the national trend, with a footfall trend line (showed by the dotted line) that is completely stable, over a 24 month period.
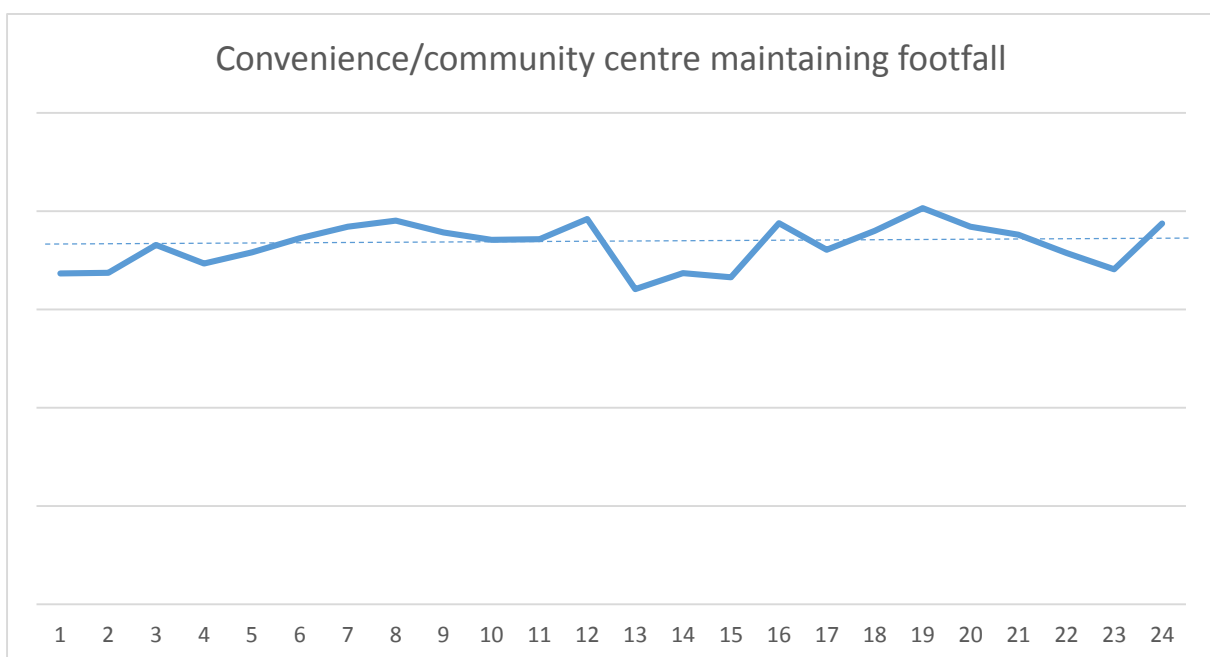
Figure 7 Convenience/community centre maintaining footfall

Our analysis of temporary events, such as markets or other hyper-local occasions, like, for

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[vi] A T-Test comparing changing footfall was applied to the two groups ('clear footfall signature' and 'no clear footfall signature). The T-test showed a statistically significant difference on the 90% significance level.

example, community festivals, can be associated with daily footfall 'surges' equivalent to a strong Saturday's trading. We are actively encouraging towns to organise and promote such events to generate footfall – it is then up to retailers and other operators to 'convert' this into sales.

How to manage and market locations by understanding their activity profile.

Building footfall is an established marketing objective for both shopping centres[82] and town centre management[83]. Until recently, however, robust, reliable footfall monitoring was virtually unknown for high streets and sporadic at best in shopping centres. We now are not only able to monitor footfall on a reliable basis but to use the information it provides as an evidence base for decision making.

The need for an evidence-based approach to both the management[84] and marketing[85] of locations is clear and it is strongly supported by Government in respect of town centres[86 87]. For a town or city centre to be successfully managed "[i]t is vital to understand how centres are used, by whom and when"[88] and yet an absence of this data was precisely what we found from our work with ten towns as part of the High Street UK 2020 project. These towns are by no means unusual examples. The lack of effective performance monitoring for management of town centres has been frequently noted[89 90 91] and has also been reported by shopping centre managers in respect of centre marketing initiatives[82].

It is clear from the literature that many factors influence where we shop. Store choice and patronage has been studied for many years[92] and continues to be a subject of research[93]. Shopping destination choice has also been extensively researched[82 85] and with the rise of online shopping this has been extended to channel choice[94]. Though the factors that influence choice may vary, many of them are potentially controllable locally and therefore capable of being managed and marketed locally. There has been consistent and strong support from government for management of town centres[95 86 87] as well as from organisations such as BCSC[96] and the British Retail Consortium[97]. 'Centre management' is one of the top 20 factors listed above as identified in the HSUK2020 research as impacting on town centre vitality and viability. Commentators have noted though that "management of a town centre is a necessary but not sufficient condition to generate a healthy town centre"[98]

Detailed information on town size and population make-up is obtainable from census and socio-economic data but town and city centre classifications have generally been based on retail rankings which in turn depend on the presence or otherwise of multiple retailers[52 54]. As the number of outlets required by a multiple to have a national presence falls, one commentator[99] suggested a reduction from 250 locations to just 80, retail rankings become increasingly meaningless for many locations. In 1994, URBED[95] suggested a classification based on five town archetypes (metropolitan cities, suburban centres, industrial towns, markets towns and resorts and historic towns) and noted that as they faced different challenges so the management and marketing solutions appropriate for them would vary. The footfall signatures identify the different way town and city centres are being used and also suggest different approaches to management and marketing.

The footfall signatures clearly indicate when the centre is being used but they also tell us something about who is using the centre. The significant rise in footfall in comparison centres in the last quarter of the year could suggest that existing users of the centre visit

more frequently in that quarter but the scale of change is much more likely to suggest that additional people are coming, being drawn from a much wider catchment at that time of year. Their means of transport to the centre, knowledge of the city, time spent in the location, and requirements for food and drink, for example, may differ greatly from regular, more local users. The same appears to apply to those who use holiday towns and speciality towns in the summer months. More detailed analysis of the footfall profile for an individual location on a weekly or daily basis will reveal more about who is using the centre. It could identify use by commuters around a transport hub at morning and evening peaks, by school children or college students, and the extent to which and how a centre is used in an evening.

Having a clear understanding of the primary functions of the centre is a key to success according to BCSC[96]. The footfall signatures tell us how customers are using the centre and this provides clues as to how the centre can better meet their needs. This is relevant as a retail channel is more likely to be profitable when designed with customers in mind[94].

Comparison Shopping Towns

Comparison centres epitomise the "strong, dominant centres" that BCSC believe should offer the widest range of retail, leisure, food and beverage[96]. They compete with other comparison centres and with other channels and hence need to manage themselves to optimise their retail offer and merchandising (anchor stores, international brands, innovative concepts, depth and breadth of offer) which potential users see as important in determining whether to visit[100].

Whilst managing the centre year round, they need particularly to focus on how to maximise the offer of the centre in the final quarter of the year. Enhancing access and orientation, making this easier for occasional or first-time visitors and dealing with additional deliveries, ensuring maintenance and cleanliness at peak times, extending trading hours to respond to demand, and ensuring that space in use is maximised will all benefit visitors. Comparison Shopping Towns also need to focus on their entertainment and hospitality provision. The marketing of comparison centres needs to focus on their strength and depth of offer. It needs to be far-reaching, using direct route connections to perhaps reach internationally. They also need to think of targeted marketing to people who travel into the centre for non-retail reasons on a regular basis but who may shop elsewhere for much of the year.

Holiday Towns

BCSC's "Beyond Retail" report suggested that most town centres need to urgently evolve, to become vibrant centres for other activities such as living, culture, entertainment, and leisure shopping[96]. The footfall profile for holiday towns reinforces this message. They are not centres that people are using primarily for their retail offer but leisure shopping should be part of the visit.

Holiday Towns need to clearly focus their management to offer a good experience to visitors during the summer peak. They need to look at how they increase and enhance their entertainment and leisure appeal. Many have traditionally actively managed their public

realm, one of six key recommendations for all towns from the British Retail Consortium[97], and this can help establish a unique place identity or contribute to the distinctiveness that is an essential part of successful place marketing. Access to the centre at peak times is critical but if holiday towns are to be sustainable in the long term as the nature of holidays taken in the UK changes, they need to also to think about developing a vision and strategy to ensure they more effectively serve their community through both peak and off peak times, possibly taking lessons from Speciality Towns.

Speciality Towns

When we have shared the footfall profiles with town and city centre stakeholders, nearly all of them want to be a Speciality Town. The long period of good footfall is attractive but this certainly does not mean such towns are without challenges. It is clear that such towns have to offer something distinctive and unique, by definition not everywhere can be special. It is often the case that the anchor is not retail but a major attraction, historic or otherwise. It appears from the profile that Speciality Towns are good at serving their local population's needs as well as the visitor, and it is perhaps therefore no surprise that places such as Harrogate, Shrewsbury, York and Chester all score highly in surveys of place happiness[101].

Managing Speciality Towns means working to protect and promote their distinctiveness and identity. It means recognising that the needs of visitors, perhaps from abroad, and residents must be balanced. The nature of the retail and merchandise offer is important and needs to match the differing requirements of the users. Speciality Towns appear to have a longer visitor dwell time and this must be supported by a range of food and drink offers appropriate to the nature of the centre. Teller and colleagues[100] found that 'atmosphere' was one of the top three influencers for determining retail centre attractiveness and getting this right is critical for the success of Speciality Towns. Whilst a lot of focus is on marketing nationally and internationally, this must be supported by locally-focused initiatives, and more detailed analysis of footfall patterns will show when such initiatives should be undertaken.

Convenience and Community Centres

Many Convenience and Community Centres have "customer streams which occur naturally within an urban place"[85] as the local residents and workers accesses essential shops, services, or transport and move around the area. Some of the footfall profiles we have looked at for these areas are very stable over the year and yet others do show variation as events or promotions are organised (carnivals, festivals, parades etc). Users of Convenience and Community Centres are often very local and many will have walked to the centre. Survey work in Church Road, St George, Bristol, which was one of the 10 towns we worked with High Street UK 2020 found that two thirds of visitors walked to the centre, only 14% arrived by car. Nearly 90% visited at least 2-3 times a week and most visits were of short duration[102]. We do not know to what extent this applies to larger centres in this category. The local nature of customers is critical to the management and marketing of most of these centres. Inter-personal relationships between retailers and customers and word-of-mouth marketing are significant and may indeed be the key element in developing a competitive advantage[103].

Convenience and Community Centres need to emphasis their convenience. They need to analyse the footfall patterns and use the inter-personal relationships to better respond to the needs of the local community in terms of opening hours, the staging of events, activities and promotions and to understand how they can better serve the community (through click and collect and other innovations). Just as with Holiday Towns, they need also to think beyond retail and offer community facilities that generate footfall. These may indeed be anchors such as a large employer, access to public transport, or recreational or entertainment facilities. They also need to focus on enhancing personal relationships and community engagement through being active social media and inclusive and passionate in approach. Most Convenience and Community Centres will only succeed if they are and are perceived as being convenient, easily accessible by local people, concentrated, and reliable. For the most part, their marketing focus must be local, though centres that are larger which still fall into this footfall profile will need to market further afield to support their retail offer.

What type of retail development will be suitable for what type of centre?

Although statistics vary, depending on what is included, the UK is the market leader in the share of retail that has gone online. According to Centre for Retail Research[104], which uses a strict definition of retail, so excluding things like travel, online retail sales the UK had a 13.5% market share in 2014 and this is forecast to grow 16.2% to a market share of 15.2% in 2015. The report notes that across Europe as a whole, online retailers are expanding over 14 times faster than conventional outlets which is "creating major strategic issues for store-based retailers". The UK is said to have an over-supply of retail floorspace[105].

It has already been noted that the number of outlets a multiple retailer needs to achieve a national presence in the UK is said by some researchers to have reduced from 250 stores to just 80[99]. Retailers want fewer stores in total but "bigger and better shops" in the larger towns and cities[106]. There are geographic differences in the performance of town centres and this is also reflected in the development pipeline, with greater demand identified in centres in the south and south east of England[107]. The footfall analysis undertaken as part of HSUK2020 and detailed above also found that centres close to stronger centres, whether edge of town, out of town or a competing town, had significantly lower footfall, as much as 30% in some instances. Hence it should be noted that whilst there is a need to renew the retail offer in many towns, they may not currently or for the foreseeable future justify much retail development.

The need to diversify what town centres offer has been widely recognised, including by the retail property industry. In his foreword to the 2013 BCSC report 'Beyond Retail', Mark Williams who chaired an industry task force, talks of the need for many centres to "evolve urgently" to meet wider community needs. BCSC echo the call of other bodies, including ATCM[108], BRC[97] and the National Planning Policy Framework for town centres to use visions and strategies to develop a unique sense of place. It would seem appropriate for new retail development to support this objective and the footfall profiles provide guidance and insight into what scale and type of development would be most appropriate for each town or city. Although there are many excellent examples of retail development that have encouraged the revitalisation of a town centre and contributed significantly to the sense of place, it is not hard to think of others which were out of scale or out of keeping with the centre they were situated in. Some of these have been demolished or significantly refurbished. Others are now seeking new uses or approaches. Such developments are not only harmful to the centre but are not beneficial in the long term to the developer.

In 2012, BCSC and Lunson Mitchenall predicted a retail development pipeline that would see somewhere between 3.5 million and 4 million square feet developed annually in the years 2015 to 2018 inclusively. It should be noted that 40% of this space was forecast to be extensions to existing centres or significant remodelling/reconfiguration of existing space. Much of this development was to be focused in London and the South East, though some of the major northern cities would also see space developed. A year later and the 2013 development pipeline report suggested that a considerable part of this development was now expected in later years with 2015 development forecast to be under 1 million square feet[109]. The report notes the uncertainty of many of the forecasts relating to development

schemes.

The footfall profiles in themselves only provide broad indications of the type of retail development that would be appropriate but they could assist those managing towns in developing appropriate strategies to promote the sustainability of their centre.

Comparison Towns

The success of retail trading in these centres means that there will continue to be demand for the 'bigger and better' units that BCSC identified in its 2012 pipeline report. As these centres compete with other channels and other major centres, they will need to create distinctive developments that retail brands will want to be associated with. Retailers not only want units of the right size and configuration but they also want the store to look the part as well and this should be part of the creation of distinctive centres that offer the unique experience that will draw customers from a wide catchment. Comparison towns will be attractive to international retailers who want a UK presence and may bring innovative trading approaches that will need to be accommodated.

Even in these large centres, new retail development is featuring non-retail elements, such as leisure offers and extensive eating and drinking facilities which is all part of creating an experience for the visitor. Further analysis of the footfall data will show the strength of flows in an evening and outside traditional retail trading hours.

Holiday Towns

The footfall profiles for holiday towns suggest most are not supportive of significant new retail development. New retail development if it does take place will most likely be to replace existing stock that is unsuitable for today's retail offer. The focus of any development would be on leisure and entertainment perhaps supported by food and drink depending on what is currently available.

The creation of a sense of place is still important in any development or refurbishment and this needs to be focused on promoting a holiday experience. The other opportunity that may exist in some holiday towns is to reposition themselves as Speciality towns, if they have a distinctive enough offer. Retail development to support this may be appropriate in such a situation, but this would be smaller scale shop units or possibly modern market facilities.

Speciality Towns

Scale and appropriateness of development are important aspects of retail development in Speciality towns. Their strong, relatively year-round footfall, may make them attractive for development. However, large covered shopping centres or even large stores are often difficult to fit into the structure of such centres and they may already have access issues. Given that these are centres that are used by locals as well as visitors, they offer attractive sites for retailers who are re-positioning and perhaps want to provide a reduced but premium offer in a smaller footprint than they may do in a major city centre. Likewise they

can, access permitting, provide opportunities for showrooms and collection locations for larger retailers. There will also be demand from specialist independents and smaller chains. They may often require affordable but distinctive premises.

Speciality towns offer real opportunities for modern market development, perhaps incorporating some shop units, restaurants and cafes, with underground or roof parking for market traders. This is discussed further in the final section of the report.

Convenience and Community Centres

Space for smaller range foodstores will continue to be required in Convenience and Community Centres. Much of the rest of the retail offer will be able to reuse existing premises, though there may be opportunities to refurbish or reconfigure units to meet the demands of new occupiers. Much of the demand will come from independent retailers, though that has issues as outlined in the next section. As convenience centres seek to become more convenient, storage space for click and collect may be useful. Pop-ups and other short term occupiers may become more frequent in these towns and markets will remain, if not become more, important in many of them. Ensuring the market is a functioning one is a key issue and this may involve relocation and refurbishment of the market facilities.

Building flexibility and temporality into the multifunctional centre

In this section, we examine how flexibility and the *temporary* use of space and units can enhance the multifunctional centre. The primary research we have conducted for the market industry[110], for example, reveals the importance of outdoor markets in generating footfall. This section provides some critical reflection on temporary and flexible usage, before finally examining some of the challenges and solutions to integrating greater flexibility in retail space.

A critical reflection on the 'fixed' versus 'temporary' nature of town centres

The reinvention of markets, as the growth of farmers' markets or the success of German Christmas Markets testify, are part of a broader movement within urban renewal that underlines the value of temporality and diversity. There are a number of labels used to describe this: Tactical Urbanism, Lean Urbanism, adaptable neighbourhoods, or even pop-up urbanism. These terms capture a range of interventions, for example, temporary galleries or public art installations, cultural events and festivals, and guerrilla interventions (gardening, lighting). Some might also include political occupations of space (protest camps, flash mobs). In terms of retail, we might include pop-up shops, flexible uses of fixed retail space, and most obviously a diversity of market forms.

Such phenomenon are characterised by a temporary use of space, or activities with a planned limited life or built-in obsolescence. Often they are the product of self-organising community activity that establishes experimental or alternative uses compared to mainstream economic or cultural activities [111]. A further defining attribute of such interventions is their low capital costs and limited operating budgets.
Arguably, temporary urbanism is demonstrative of communities simply making-do in the face of adverse economic conditions and restricted public expenditure. Although the recent economic downturn has undoubtedly contributed to an expansion of flexible and creative interventions, we must also consider the structural vacancy within town and city-centres produced by decades of counter-urbanising processes and demographic change. Temporary urbanism, therefore, is perhaps not just simply a question of how to fill empty shops during the recession, but also asks what to do with vacant commercial and industrial premises, derelict sites and indecorous car parks, as a strategy for urban renewal where access to large capital and infrastructure funding is unavailable.

It is not surprising to learn of the professionalisation of temporary urbanism as architects and urban designers use similar tactics to show how sites might be used otherwise, as a device to demonstrate potential to developers or planners. The Canning Town *Caravanserai* [112] and Brent Council's *Meanwhile Project*[113] perhaps exemplify this. Consequently, temporary urbanism appears to be shifting into mainstream urban regeneration practices[114]. This does raise some concern, for instance, to what extent do such projects contribute further to a precarious job market by reproducing flexible employment practices: the pop-up shops phenomenon equates to pop-up jobs argument[115].

There also remains a danger that temporary interventions are simply an interim strategy or

a practice of making-do until 'normal' market conditions return only for mainstream profit making to supplant local achievements. There are many examples of *creative destruction*, a situation whereby experimental and creative uses of urban space have successfully established attractive vibrant neighbourhoods, only for gentrification to subsequently price out self-organising not-for-profit activities, quashing the distinctive nature of such spaces[116].

How temporary events, such as markets and festivals drive footfall

Our recent research[76] shows that temporary (albeit regular) retail markets can continue to play an important role in the life of towns and cities, by not only contributing positively to local economies, but also providing important social and political functions. The operation of a market can significantly increase footfall by between 15-27% compared to locations without markets.[vii] However, the trading potential of markets varies. A declining market is symbolic of declining vitality and viability of a town, and often signals failings in town centre management or governance. For instance 26% of markets have experienced a decrease in performance[117]. Nevertheless, markets remain important assets to a location, but effective management in terms of adapting to the future needs of the catchment is important to maintaining their effectiveness. Markets, like other forms of more traditional retailing are under challenge, not only by competitive threats of supermarkets, but also by higher customer expectations, poor planning decisions, underinvestment, and a failure by traders to adapt to changing consumer markets[118]. So, whilst the market 'space' is a huge potential asset for the multifunctional centre, the wrong management or mix of traders can easily turn it into a liability.

New approaches to managing change

The notion of adaptive or iterative neighbourhood change involves working with the existing urban form and structure of towns, in contradistinction to masterplanning or comprehensive redevelopment[119]. We might align temporary and flexible uses of the built environment, therefore, with the principles advocated by Jane Jacobs[120] or the New Urbanism movement[121], whereby interventions that encourage sites of dense, small-scale and diverse land-uses, and are generative of a vibrant public realm, contribute to the construction of sustainable and liveable communities. Physical environments such as this provoke individuals to engage with each other and provide natural surveillance, contributing to the construction of a sense of community and place identity. In this context, markets in particular might play a vital role.

Why we need to integrate temporality more successfully into developments?

Encouraging temporary uses provides not only an opportunity to restore an element of vitality and vibrancy to retail centres, but also raises the potential for generating progressive models of town centre management based on inclusive forms of local governance. In short, there is an opportunity to rethink how our centres might be brought back into effective use through better integration between planners and stakeholder groups including various

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[vii] Based on analysis of open markets on each of the homogenous shopping days (Monday, Tuesday, Wednesday and Thursday) compared to footfall in locations without markets, on the same days.

community interests. Greater independence and community-managed assets offer a mechanism to enable local people to take greater control of their centres and create services that meets the needs of the local catchment. The results of our HSUK2020 project, for example, demonstrate those localities with a strong leadership, effective collaborative management structures, and a clear sense of who they are as a town, are much better equipped to ride out the economic downturn, and adapt to changing market conditions.

Promoting the re-use of empty space, however, is not without challenges. The HSUK2020 project[122], for example, identified *barriers to entry* and *lack of support for innovation and entrepreneurship* as factors significantly affecting the vitality and viability of town centres. Our recent continuing professional development sessions with Royal Institute of Chartered Surveyors also reveals significant barriers to encouraging short-term leasing arrangements and taking-on independent businesses as tenants. If a property owner has a long lease with a major retailer, for instance, there is little incentive to tear up these arrangements to make-way for a new business, even if the space is empty. Indeed, even when a landlord has an unleased space, some might feel it is better to leave a shop empty in the hope that a major tenant will come by in the near future. Independents, it appears, generate many perceived risks:

- Less likely to commit to long term leases
- Concern whether the business will last to trade out the lease
- Costs of removing a temporary leaseholder, should a better offer arise

In addition, without a major tenant signed up, obtaining finance for new developments might also prove difficult.

Overcoming these challenges might require local policy responses that focus on raising the capacity of property owners to provide the legal and business support to new independent businesses. It might also involve exploring the absorption of risk of temporary uses, for example, working with local authorities to provide subsidised space. In certain locations, property owners might need to accept that the restructuring of the national retail industry means that in certain locations many traditional high street names are simply not going to return in the near future. This may require an acceptance that a combination of high rental costs and business rates is preventing new business development. As we have shown through HSUK2020, centres with high vacancy rates repel footfall and will continue to decline. Taking a hit on rental income to bring in new usages, therefore, might make sense in the long term if it helps a place restore footfall, as this is likely to be good for all, traders and the community.

With average leaseholds becoming shorter, short and pop-up leases provide a mechanism through which to encourage new independents. There is scope, therefore, for the retail property sector to help overcome some of these challenges by providing routes for new business creation, for example:

- Providing incubator space, perhaps working in conjunction with local education providers

- Integrating POPs (privately owned public spaces) into new developments – open spaces to create room for markets, festivals and events
- Incorporating smaller sized units for smaller operators in design
- Subdividing larger store formats to accommodate independent traders and franchisees

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