

BUILD BACK BETTER

Covid-19 Supplement for town centres

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For town centres and high streets to thrive post-Covid-19 and rediscover their community purpose, we need to see...

1 - Localism

A massive shift in power away from central government to local communities and a renewed focus on localism. Local people must be empowered to redesign their own high streets and have a say on the businesses, services and amenities that occupy it, with increased CPO powers if necessary

2 - Leadership

Local leaders valued and recognised in the same way that powerful mayors are viewed in other countries. Candidates for leadership roles should be selected for having a broad range of dynamic and collaborative skills in order to get the best out of their communities. They must embrace change in order to build back better

3 - Fewer cars, more green space

Fewer streets and a huge expansion of green space, parks and town squares.

Our towns and cities must no longer be designed solely around the car as people learn to appreciate the benefit of open spaces

FOREWORD

Coronavirus (COVID-19) will be blamed for many things as time goes by. But one thing is certain, it has accelerated the demise of town centres and high streets as shopping destinations, and paved the way for a post retail landscape to emerge. The first Grimsey Review published in 2013 highlighted this decline, arguing that it was futile to cling on to a sentimental vision of the past and that high streets had to be re-invented as unique Community Hubs designed around health, education, culture, housing, leisure, art and crafts, along with some shops. Five years later Grimsey Review Two 2018 celebrated examples of towns in the UK and Europe that had begun to repurpose their high streets in this way and called on central government to remove barriers to progress. We also urged local authorities to demonstrate the leadership required to put transformation plans in place.

As climate change continued to move up the political agenda, managing this transformation became increasingly difficult. But progress was being made in all parts of the country. Then along came COVID-19 and changed everything. Lockdown and the need to stay at home and protect the NHS shut our high streets overnight. The impact of this on wider society is still uncertain and, during this time, I was asked if we would examine the likely pandemic related consequences for town centres and high streets. Recognising this to be a watershed moment, I contacted some of the Grimsey Review Two team, made some new additions and in a remarkably short period of time we have produced this Grimsey Review COVID-19 Supplement paper.

One of the new members is Neil Schneider, who until his recent retirement was the Chief Executive of Stockton-on-Tees Unitary Council. I first met Neil when compiling examples of best practice for The Grimsey Review Two in 2018 and he has provided a very candid piece on leadership, offering valuable insights into the skills and mindset needed to make high streets fit for the 21st century. Previous Grimsey Reviews have concentrated on new technologies and how the 'mobile device culture' of

the noughties was replacing the 'car-borne culture' of the second half of the 20th century.

That is still a major factor and, in lockdown, internet shopping has grown further, putting bricks and mortar shopping under even more pressure. We have not studied technology for this COVID-19 supplement, deciding to concentrate on the social and economic impact of the pandemic. Neither have we studied or proposed how town centres and high streets might adopt new arrangements so it is safe for people to gather. There have already been papers written about this and, indeed, the Government's High Streets Task Force has published a four point strategy and 10-point check list for these places and respective authorities to follow.

Instead, we have concentrated on the following; examining the national and local economic impact on high streets and the various commercial sectors involved, what consumer behavioural changes we can expect to see and the opportunities for social renewal, the national and local political challenges that we face and examples up and down the country of communities and businesses that are already embracing a community hub model. Our analysis throws up some important questions. While previously, we've asked if Britain had too many shops, it's now time to ask whether we have too many streets? Why isn't there enough green space in our town centres, what kind of leadership do we need to help high streets adapt and why have local communities been shut out for so long?

At the end of the paper we have highlighted examples up and down the country of where towns are creating a supportive environment for a bright future to grow. These real life examples demonstrate that progress has been made and, while our high streets face their most testing period in generations, local leaders who are brave enough to imagine a new world have a better chance of succeeding.

Executive Summary

When our Prime Minister emerged from hospital after spending several days in intensive care being treated for Covid-19, he signaled a change in priorities. Quoting the Roman statesman, Cicero, he said, “the health of the nation should be the supreme law”.

As this paper will argue, this ought to be put to the test in restoring our nation’s high streets and town centres. They are arguably the most symbolic representation of community wellbeing, yet shuttered shops and urban decay blight far too many areas. Rather than lift communities and strengthen social capital, they hold them back and breed isolation. Instead of acting as a catalyst for good health and neighbourliness, they’ve become a frontline for ill health and crime.

Faced with the huge challenge of rebuilding our high streets, we are presented with a golden opportunity to repair their neglected social fabric, lead a values-led period of social renewal and deliver lasting change.

Given the state of our battered local economies, this is no small task, yet this Grimsey Review COVID-19 supplement is optimistic we can rise to the challenge.

Out of the ashes and pandemic rubble will eventually emerge signs of recovery in every town up and down the country. Brave entrepreneurs will create businesses that reflect a new value system as people are appreciating spending less money, breathing cleaner air, noticing more wildlife and sharing a stronger sense of community. What is needed is a call to action, which encourages that process, removes the barriers to progress and facilitates change quickly.

This will require a huge shift in power from central government to local communities, putting the people best able to lead that change in charge. It will also require an understanding that the challenges facing our towns and high streets are simply too big for Westminster. They cannot be solved by pulling big levers in Whitehall. Our politicians’ job is to provide policies that empower communities to come up with solutions that are unique to their needs. The pandemic has changed everything in the sense that people have had to

adapt to a life threatening crisis, change their behaviours quickly and a new normal is emerging. This paper examines the harsh economic facts largely exacerbated by an obsession to build more shops against a background where more people were switching to online shopping. Incredibly, this obsession still continues and more investment is going to end up misplaced and irrelevant. A recent YouGov poll revealed that only 9% of Britons want life to return to ‘normal’ after the coronavirus outbreak is over. People have noticed significant changes during the lockdown and they know a better life is possible – and our high streets have to be part of this.

To achieve this better life, it will be incumbent on government to blow away some of the restrictions of the past and put in place devolved powers that enable local communities to act. Business rates on retail and hospitality premises, for example, which have been waived for a year, can easily be dumped and replaced with a simpler system during this time. Literally all parts of the economy will change; global supply chains will be challenged, local tourism will become even more important, the commercial property sector will need to wake up as home working or working closer to home becomes accepted practice. Manufacturing should return in a big way as we start to reject global sourcing, exploitation of cheap labour and environmental damage. We will also need to re-examine pay structures, understanding that a prosperous society needs to recognize and reward essential workers in a fairer way.

We can only hope the leaders of our towns have used the lockdown opportunity to pause and reflect – and that decisive action will follow. We need to see ambitious plans to give all communities a proper stake in their economy. Old consumption driven thinking must make way for healthier driven strategies that meet the desires of a younger generation, embracing seasonality, community and unique experiences.

This change has little to do with shops and everything to do with the community spirit and togetherness kindled by this pandemic. Unique places will emerge embracing the ‘new normal’, using technologies in very different ways. Climate change, which has not gone away, will climb back up the agenda and become the priority of the next generation who will also inherit the biggest public debt since World War Two.

If we are going to come out of this period in better shape, then it will be because we have recognised the old model is broken. An exciting new model is now ready to be developed and implemented by inspired local leaders...

This is a model that:

1. Sees a massive shift in power away from central government to local communities to give everyone a stake in their town centres
2. Puts sustainability and the environment at the heart of everything
3. Is based on quality of life, experiences and not blind mass consumerism
4. Recognises and rewards great local leadership accordingly
5. Devolves power locally, removes constraints and allows local communities to develop their places to compete for people to live, work, play and visit

6. Removes old taxation that has become inappropriate
7. Encourages sectors to jointly manage risk in order to prosper

Progress has been made since the Grimsey Reviews of 2013 and 2018 but it has not been as fast or as radical as it needs to be. Everyone has had a different experience during lockdown and many have recognised that the most important thing is our health. Collectively, we've had a real wake up and smell the coffee moment, except, ironically, it was a wake up and smell the 'fresh air' moment.

Turning this precious realization into a better future will require a lot of hard work and determined rebuilding. The following recommendations are a good place to start.

RECOMMENDATIONS

Transferring power to communities

1. **Expanding their purpose:** Local authorities to establish high street Citizens' Assemblies to generate a bigger conversation to rebuild their high streets and create a community plan to move beyond retail
2. **Community Value Charters:** Require Councils to give communities a greater say in the benefits received in the commissioning of local services from commercial suppliers
3. **Reward key workers & support the hospitality sector:** Introduce a Covid-19 stimulus scheme through a discount voucher system redeemable in town centre restaurants and cafes for key workers in the pandemic – e.g. NHS, police, fire service, bus, train and supermarket workers
4. **Introduce Community Right-to-Buy laws,** as the Scottish government has done – to ensure unused or neglected properties are forced back onto the market, and can be bought by community trusts or local authorities
5. **Transparency of property ownership:** To enable an accountable property market, the UK Land Registry could do as Companies House has done for company ownership and open up its full dataset, for free, on who owns all high street property and land in the UK
6. **Participatory planning and getting young people involved in the design of high streets:** Give participation rights for children and youth in the planning process, as is the case in Norway under their Planning and Building Act
7. **Introduce voluntary working in the community/environment projects into the**

school curriculum from year 7 onwards with a subsequent GCSE

8. The National Lottery Community Fund, government and other foundations to **create English, Welsh and Northern Irish Land Funds**, as in Scotland – to enable community trusts to invest in properties for local benefit
9. **A reduction in streets and a huge expansion of green space**, parks and town squares
10. **Local authorities to invest in property as a low-cost platform for local benefit** – to house activities that support meaningful work, local trade, wellbeing, belonging and so on, rather than to maximise commercial return

Leadership

11. **Local leaders need to be valued and recognised in the same way that powerful mayors are viewed in other countries.** Candidates for office should be selected for having a different mindset, characteristics and skills in order to get the best out of their communities. They must embrace change in order to build back better
12. **Establishment of a web-based knowledge system** to share good practice and public action in a world of private ownership that can be delivered best through collaboration

Taxation

13. **Business Rates.** Take the opportunity to scrap business rates in the retail sector altogether as an outdated inappropriate property tax. Replace it with a straight forward 2% sales tax that will raise the same amount as before and level the playing field between online and offline retailers

Post retail planning

- 14. Re skilling for employment.** Government needs to establish a Special Commission to re-skill and address the issues facing the millions of predominantly young and female workers from retail and hospitality who will lose their jobs
- 15. Kickstart a local seasonal fresh food renaissance** by establishing rewards/tax breaks that recognize locally grown produce
- 16. Urgently re-visit the government commissioned Digital High Street 2020 report** and ensure its recommendations, particularly the need to eliminate the current gap in digital skills in our communities by 2020, are met

Property

- 17. Commercial Property Rents.** Encourage all stakeholders to be engaged with commercial property leases with rents being linked to the success of the occupying business
- 18. Reform the current archaic retail rental structure.** Convene an expert group of senior surveyors and leading retailers to devise a new formula for a 'fair rent' for retail premises
- 19. Waive Empty Property Rates for retail landlords** where there is clear support for this measure from the host local authority
- 20. HM Treasury to permit local authorities to buy properties as long as these are used to create local benefit (rather than to maximise commercial return).** – Public Works Loan Board to continue to provide cheap, patient, flexible, long-term loans to enable this

Planning

- 21. Planning and Use Classes.** Deregulate the use class system and give Local Authorities

the opportunity to develop an appropriate proposition to attract people to live, work, play and visit a unique town

- 22. Town Centre Safety Kitemark.** Government should create a scheme that details the minimum health, safety and environmental standards for Towns to achieve and make public their performances through a Kitemark Scheme
- 23. Ease CPO Powers.** An interventionist drive to tackle empty buildings using CPO's and other regulation powers will be required. There should be serious consideration of relocating public assets to the town centre and for the high street becoming an enterprise zone

Transport

- 24. Pilot mobility hubs** that offer many types of travel within a single location. This would include train, cycling, bus, car club vehicles and electric scooters.
- 25. Incentivise people to give up cars** by rolling out the 'mobility credits' pilot that's due to take place in Coventry (2020) in other towns across the UK. This encourages people to exchange older, polluting cars for mobility credits that can be spent on public transport and car clubs, bikeshare or new bus services. Credits can be accessed through a mobile app, which allows them to pay for their journey using mobility credits
- 26. Recognise that towns and cities must no longer be designed around the car** and begin a major shift in planning and design to reflect this. This should make the 20-minute neighbourhood a central principal of the planning system in order to encourage people to travel less, buy locally and be able to get all the services they need within a short walk
- 27. Introduce a pedestrianisation task force to immediately make significant parts of town centres car free,** allow restaurants and bars to trade and meet social distance rules and discourage unsustainable habits. Consider de-mapping some streets to create new parks and green space

CONCLUSION



For over 40-years, I spent a career in retail working with contemporaries to change the landscape of town centres and high streets. Together, we managed to clone every town in the UK with the same brands. Every high street soon began to look the same and we put paid to thousands of butchers, bakers and candlestick makers.

But we didn't stop there. The retail juggernaut of the 1980s was unstoppable and new frontiers beckoned. Deindustrialisation ensured there were plenty of empty brownfield sites and it was easy to get planning permission. Huge out of town superstores and retail parks were established, sucking the life out of towns. As a director at Tesco at the time, we were building 25 superstores a year. Rapidly increasing car ownership created the perfect conditions for vast supersized stores to gobble up market share. We changed the landscape beyond recognition. But we also changed the way we live. During the retail boom, my contemporaries and I wanted to give consumers any product they wanted in the world on any day of the week. So, we destroyed our dependence on seasonal produce through sophisticated worldwide supply chains and made fruit and vegetables available on demand.

We realized we could fly fresh food in temperature controlled containers and unload them at Heathrow straight into huge multi-temperature distribution sites where they'd be driven to supermarkets.

As a result, my grandchildren are now growing up believing that strawberries grow all year round here. They have never enjoyed the pleasure of those first Jersey new potatoes with lashings of butter in March after a winter of mash.

This was celebrated as progress. But a new generation is now seeing things differently. The Fridays for Future climate movement, which is made up of millions of school children, do not want French beans flown in on a cargo jet from Kenya because they see the environmental damage it causes. And although COVID-19 has driven up the demand of pre-packed produce through fear of touch contamination, that will pass and bulk produce will become popular again. It's a bitter pill to swallow when you realise that what you spent your whole life building now needs to be unpicked in order to build back a better place. But that is the starting point of this review and, while it may be deeply personal to me, I know the broader sentiment is shared by many.

COVID-19 has introduced us all to a different way of life. As the world stopped and smog filled skies began to clear, the nation took time to reflect. And surveys show we want to build back better and not return to business as usual. Being in the vulnerable age group and knowing there's a chance, albeit small, that catching the virus could mean you are dead in four weeks time is scary. But it makes you reflect on what is really important. Our health is all that matters and the scramble for more material wealth, which defines many careers, now seems futile and irrelevant.

As we emerge from lockdown, we are presented with a once in a generation opportunity to redefine our social values. Greed and mass consumerism can now be replaced by a way of life that values the environment and fosters a new sense of community.

The pandemic should also sharpen our climate change focus. Although the planet has enjoyed a brief respite from the reduction in greenhouse gases, it won't last unless we permanently shift to a less carbon-intensive lifestyle. This paper is a call to action. For those communities and towns that have not already started building plans to transform their place, they need to start now.

There has never been a better time. People are ready to listen and engage. For those communities and towns that have made progress with plans, now is the time to look at them afresh and engage local communities again. There is a different mindset out there and an appetite for change. Don't wait. If we allow this window of opportunity to slip away, people will fall back into old habits and it won't be long before we're choking the planet again and crushing community spirit before it had chance to grow.

Since the first Grimsey Review in 2013, we have witnessed a slow but progressive change in approaching town centre planning. Many are still wedded to a 20th century mindset, but in some places the penny has well and truly dropped. In Stockton-on-Tees and Roeselare in Belgium, for example, the shift towards a community hub concept, no longer simply reliant on retail, has been remarkable. The quality of life in these places has improved and that was achieved through a collaborative effort from all stakeholders and strong leadership.

When I started my career back in the 1970s, I looked upon high streets as a place of opportunity. They still are. But the opportunity this time is bigger. Shopping is just one of the challenges facing town centres. High streets are inextricably bound up with climate change, seemingly intractable transport problems, crime, worsening public health, loss of community and shared sense of belonging. Breaking this nexus of problems is key to the promise of a better life for all.

That opportunity is now within touching distance – but to seize it we need to let go of the past. It rests on all of us, not just decision makers in local and central government, but in communities everywhere to make it happen.



June 2020

STATE OF THE NATION

These sectors were already broken before the pandemic. A summary of the facts and figures from our research

Retail

- 5% of GDP and employs 2.9m workers
- 47% of retailers at significant risk of failure
- 18% have negative balance sheets with a combined shortfall of £2.2bn
- 107 major failures since start of 2018 affecting 126,000 jobs and 5,700 shops
- Average financial health rating of only 36 out of 100

Pubs and Restaurants

- 5% of GDP and employs 3.2m workers
- 59% of pub and club operators at significant risk of failure
- 27% have negative balance sheets with a combined shortfall of £2bn
- Average financial health rating of just 28 out of 100

Retail Property

- 42% drop in retail property investment between 2014 and 2018
- Retail property investment totalled only £200m in first half of 2019
- 78% drop in shopping centre investment between 2014 and 2018

Our towns and cities must no longer be designed solely around the car as people learn to appreciate the benefit of open spaces

FINANCIAL RISK IN HIGH STREETS AND TOWN CENTRES

Introduction

No UK business sectors could have foreseen the commercial catastrophe of the Covid-19 pandemic, nor anticipated the extraordinary speed with which it struck. One minute business was functioning, the next whole swathes of the economy were shut down by the government. Sadly, it is difficult to imagine any other industries, which came into the crisis less well prepared and with more fundamental challenges than retail, hospitality and retail property. In this review of financial risk, we will be concentrating on these key players in Britain's high streets and town centres.

Retail

This sector contributes 5% of our GDP. Its 300,000 outlets and 200,000 VAT registered traders employ 2.9m or almost 9% of the UK's 32.9m employed workforce. We utilised the Company Watch financial modelling system to review the finances of the 86,694 companies registered at Companies House as being retailers. Between them they have total assets of £194bn, borrow £40bn and have a combined net worth of £77bn.

The financial health of the sector as we headed into the pandemic could hardly have been more worrying or less robust. The Company Watch

system analyses the latest published financial statements of companies to establish a health score (H-Score®) out of a maximum of one hundred. Across the retail sector, the average H-Score was only 36 against an expectation for the economy as a whole of somewhere in the range between 45 and 50. Any company scoring 25 or less out 100 is deemed to be in the Warning Area, with statistics going back more than twenty years demonstrating that such businesses have a one in four risk of filing for insolvency or needing a major financial restructuring during the next three years. Almost half of all retail businesses (41,811) were in the Warning Area.



Debenhams collapsed into administration for the second time in a year in April

The full details of this analysis can be found at Appendix three to this update. We also looked at companies with negative balance sheets, which we have called 'zombies' and which fail one of the two core insolvency tests set by the Insolvency Act. 18% (15,908) of retailers are zombies; between them they have balance sheet deficits totalling £2.2bn.

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We also segmented retailers by the value of their total assets, in order to highlight where the greatest risks lie within the sector. We found that companies with assets of £100k or more had a far better but still below par average H-Score of 45 out of a hundred but that even so 34% (12,826) were in the Warning Area. For those companies with assets below £100k but more than £25k, the average H-Score is 31 and 53% (15,532) were in the Warning Area. Finally, the smallest retailers with assets of £25k or below had an average H-Score of only 27 and 67% (13,453) were in the Warning Area.

Despite regular newspaper headlines focused on well-known high street brands, formal insolvency is not excessive in the retail sector. There were 1,592 retail insolvencies in 2019 or 7.4% of all corporate and trader insolvencies. This is in line with failure levels since the recovery started after the global financial crisis of 2008. But this must be seen against a commercial climate where it has been quite difficult to go bust, with sustained, record low interest rates and a cautious approach by lenders, anxious to avoid worsening their tarnished reputations by being seen to be trigger happy with struggling businesses. The trend in retail insolvencies is detailed at Appendix one to this update.

But when retailers fail, the impact on jobs and high street/town centre environments can be devastating. This is illustrated perfectly by the statistics published by the Centre for Retail Research, which records the details of major retail failures. Both 2018 and 2019 saw serious

damage caused by just 43 major collapses, with 46,000 jobs affected in each year and some 4,600 stores impacted across the two years. 2020 has not started well and it must be remembered that we have been in a state of suspended financial animation since late March when lockdown started, with substantial government financial and legislative intervention in place designed to prevent the closure of businesses. Even so in only the first four months of 2020, there have already been 21 major failures, affecting over 34,000 jobs and over 1,100 stores. A full summary can be found at Appendix two to this update.

These numbers exclude the significant slimming of store portfolios over the past two years by most UK retail brands, which have added as many or more to the lost job and closed store figures as those quoted in the Appendix. The shop vacancy rate of 12.2% in March 2020 was already moving up after the poor festive season, although it still had a way to go to match its peak of 14.6% in 2012. It is anyone's guess what the rate might be by the end of this year.

Hospitality

Taking hospitality as a whole (including hotels and other accommodation), the sector also contributes 5% to GDP and employs 3.2m or 10% of the UK workforce. It has total assets of £41bn, borrows £14bn and has a combined net worth of almost £13bn. Nevertheless, no matter how fragile the retail economy was at the start of the pandemic, the hospitality businesses that play such a key role in providing visitor experiences in high streets and town centres were in far worse shape.

Once again, we used the Company Watch system to analyse the finances of two distinct parts of the sector, that is restaurants and then pubs and clubs. Together, they scored an average H-Score of 28 out of a maximum of a hundred, with restaurants averaging only 27 and pubs and clubs 30. 60% (22,293) restaurants and 58% (7,059) of pubs and clubs are in the Warning Area. This means that 59% of hospitality businesses in the UK are at risk of failure over the next three years. 27% (13,200 hospitality companies) are zombies, with a combined deficit of £2bn.



The hospitality sector employs 3.2million or 10% of the UK workforce

Formal insolvencies occur more frequently in this sector. There were 2,459 business failures among companies and traders in 2020, representing 11.3% of all UK insolvencies or more than double its share of GDP. Only the construction sector has a higher failure rate relative to its contribution to the economy.

We do not have statistics comparable to those for major retail failures, but the slimming down of outlet portfolios by the major mid-market restaurant chains had already been in progress for some time before the pandemic struck, as they struggled to reverse their previous ill-judged expansion binge, fuelled in some cases with unsustainable debt provided by aggressive private equity owners.

Retail Property

Long before the crisis kicked off all-out war between landlords and tenants of retail and hospitality sites, there had been a long running battle to change the major metrics of the retail property business model. The drivers are well known, based on excess capacity in both sectors caused by fundamental changes in consumer behaviour, most notably the rise of both internet shopping and home delivery dining.

Average lease lengths had already dropped like a stone, whilst aggressive tenants used either their commercial muscle or controversial CVAs to impose rent cuts or rental basis changes on landlords. The financial travails of major landlords like Intu and Hammerson were well advanced before Covid-19 decimated their rental incomes and the government took sides with their

tenants in its desperate efforts to limit the closure of businesses.



The shop vacancy rate in March this year was 12%. It's anyone's guess what the rate might be at the end of this year

The grisly downturn in the retail property market can be seen from a range of statistics published in the months just prior to the crisis by CBRE and Radius Data Exchange. There was a 42% fall in retail property investment between 2014 and 2018. There was a 78% drop in shopping centre investment over the same period. There were no new shopping centre openings at all in 2019, although some existing centres were extended. The value of retail property assets changing hands in 2018 (£6.1m) was 47% down on 2017. Retail property investment collapsed to only £200m in the first half of 2019. One in three London shopping centres were subject to planning applications for at least some element of conversion to residential use.

A fascinating aspect of the crisis will be its impact on rental income and therefore property values for those landlords, which had already moved from a fixed rent basis to some form of turnover-linked rent as a result of the pressure applied by the slew of retail CVAs in 2018 and 2019. The devil will be in the detail, but if the apparent acceleration of retail spend from physical stores to online channels is confirmed a long-term effect rather than a short-term expediency then these leases in particular will surely need revisiting.

Given the further impact of the pandemic on the turmoil already taking place in this sector, there is a strong possibility that a substantial amount of retail property will fall into the hands of insolvency practitioners over the next few months, just as swathes of the hotel industry did in the recession of the early 1990s. The concern for those looking

to engage landlords as key stakeholders in the effort to reshape high streets and town centres following the crisis, is that at least some of these financially-impaired property assets will end up in the hands of vulture funds and financial engineers, often overseas and sometimes offshore-based. The challenge of developing a constructive dialogue with them will demand some very special skills and a great deal of patience.

Summary

We have set out the financial insecurity of three of the most important voices in the future of our high streets and town centres. Our analysis is based on the latest available financial data, which unfortunately is by its nature historic because of the filing delays allowed by Companies House. As such, the gloomy picture does not even reflect the impact on the retail and hospitality sectors of what at best was a subdued 2019 festive season.

It is far too soon to have any coherent view of the medium and the long term effect of Covid-19 on these businesses, but we know the short term impact has been off all known charts. It is impossible to model likely financial outcomes when revenues drop by 90% or even disappear altogether, or when business rates are suspended and much of the workforce is being paid by the government. We know that despite a limited incidence of rent holidays granted by enlightened landlords, liabilities are building up. Some businesses have taken on loans under the CBILS and CLBILS schemes or from other sources, which they may not be able to repay. Nor can we guess what will happen to consumer sentiment and spending as we emerge blinking from lockdown into whatever passes for the 'new normal'. We went into this emergency with 52% (71,163) of retail and hospitality businesses at serious risk of failure.

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Notwithstanding business failures, there will be a massive cull of outlets. Retail experts at KPMG previously expected high street retail space to shrink by 25 per cent by 2025, but now see that happening by 2022-23. Online retailing, they believe, could reach 50 per cent of the UK total by 2025 – five years earlier than previously anticipated. The restaurant guide, Harden's noted in the middle of May that only a third of restaurant operators expect to re-open their full portfolios after lockdown. It reported predictions that no more than 70% of hospitality sites will go back into operation.

It is worth noting that the retail and hospitality sectors between them employed 6.1m people before the crisis. A very significant number of them are currently furloughed and sadly, many of them are actually unemployed but simply do not realise it yet. This stark reality will soon be confirmed as the furlough scheme is unwound between August and October. The great majority of these workers are both young and female. It is essential that government, both centrally and locally addresses this issue with measures to re-skill them for whatever the new employment normal turns out to be.

At this very early stage, the only certainty is uncertainty and that many of the pieces in the existing jigsaw of our high streets and town centres will be missing. However dramatic the impact and draconian the financial fall out, this will create a unique opportunity to recreate these places in a modern and exciting way, built for the future and not for a time that has gone.

A CULTURAL SHIFT THAT'S BEEN YEARS IN THE MAKING

Throughout history, shocks and moments of ferment have frequently led to a fundamental shift in values. After World War One and the pandemic Spanish Flu, the roaring twenties replaced traditional values with a faster, exuberant and more daring approach to life. The Second World War, on the other hand, led to the creation of the welfare state.

After months of isolation, many anticipate a similar adjustment in a post-pandemic world, and a major recalibration in the way we think. If we're to take anything from pledges from mayors around the world not to return to business as usual, along with a commitment from UK mayors to build back better, then high streets should face a period of prolonged change.

But the truth is this cultural adjustment has been underway for years, and a shift in values among younger people increasingly demands change. Even before we went into lockdown our high streets were facing an existential crisis. It's not just their survival that's at stake (according to the British Retail Consortium, 2019 was retail's worst year ever). Questions need to be asked about their very purpose.

According to a poll carried out earlier this year by Nationwide, more than two thirds of people say their high street has declined in the last five years, with 21 per cent saying it no longer meets their needs and is an unpleasant place.

Challenges associated with shops reflecting a low aspirational aim, a poorly designed environment and fear of crime are well documented. But above these problems hovers another spectre; the unacceptable face of capitalism and the damage its greed has caused in our high streets and town centres. Examples are everywhere to be seen. There are the boarded-up former department stores, which had their viability destroyed by decades of under investment after their owners had taken over a billion in cash offshore in dividends. Then there is the saturated casual dining market, where hundreds of restaurants will not be reopening after the Covid-19 crisis has finally passed, because their private equity owners saddled these chains with too much expensive debt and forced them to expand too far and too fast by signing ruinously onerous leases.

It is no coincidence that almost all of the significant casualties of the crisis so far have been private equity owned or subjected to years of fancy financial engineering, which has weakened their ability to withstand the economic shock of the pandemic. Among the high profile failures already are Oasis and Warehouse, as well as Cath Kidston. There will be many more as high return focused owners with no emotional attachment to their investments, nor any sense of community responsibility walk away without a thought for the empty premises and lost jobs they leave behind.

This approach is very much at odds with a growing view among young adults in particular that business needs to be accountable to more than its bottom line, and be accountable for the wellbeing of its people and communities. The notion of 'stakeholder capitalism' where businesses should serve wider societal interests rather than just their shareholders was the main theme at this year's World Economic Forum meeting in Davos just before the pandemic hit. With a renewed focus on the health and wellbeing of staff and customers starting to define the future economy, shareholder primacy is no longer sacrosanct.

Neither is the belief in rampant consumerism. A younger demographic is beginning to push back on an economic model that many believe has reached 'peak stuff'. We're already seeing this driving the growth of the experience economy. A study by Harris Group found that 72 per cent of millennials (aged 24 to 38) would rather spend their money on an experience or an event than buying things, and this is reflected in the shift towards leisure, arts, culture and dining on high streets. Social media is a key driver. Posting pictures on Instagram of new experiences is de rigueur. Pictures of what you've purchased are a bit passé.

Deloitte's 2019 millennial survey showed that millennials will patronise and support companies that align with their values and make a positive impact on society. Generation Z's (aged between 5 and 23) are also socially focused with their opinions on companies formed by their ethics, practices and social impact.

Their influence should not be underestimated, particularly while we're not far from one of the greatest wealth transfers in modern times. By 2030 we will see baby boomers pass on trillions of pounds in assets to younger family members leaving them with much greater spending power.

Business is beginning to recognise this. The largest survey of its kind, the Edelman Trust Barometer, which surveys 33,000 respondents over 27 countries, shows that 76 per cent of people agree that CEOs should take the lead on change rather than waiting for government to impose it.

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The Fridays for Future generation led by Greta Thunberg wants to see business leaders creating positive change in critical areas such as equal pay, environmental stewardship, prejudice and discrimination.



A new generation wants to see business leaders creating positive change (credit: V Pickering)

Those businesses that refuse to recognise this are going to struggle. "The public expectations of your company have never been greater...", explains Larry Fink, chairman of Blackrock, the world's largest asset manager with nearly \$7trillion in investments. "Every company must not only deliver financial performance, but also show how it makes a positive contribution to society. Without a sense of purpose, no company, either public or private can achieve its full potential."

A similar view is already being reflected by UK business owners as we emerge from lockdown.

“Businesses that feel like business as usual, more consumption driven, low conscience businesses, I think are going to have a really tough time rebuilding the sort of level of customer engagement they had,”

“Businesses that feel like business as usual, more consumption driven, low conscience businesses, I think are going to have a really tough time rebuilding the sort of level of customer engagement they had,” argues fashion designer Patrick Grant. “Because having a social conscience is a minimum standard now for certain consumers. If you are not demonstrating positive social responsibility in the way you operate your business, then I think a lot of people will just walk on past.”

This is also mirrored in the investment landscape, which is starting to take on the characteristics of socially responsible change. While wider markets have just suffered their worst quarter since the financial crisis of 2008, ESG (environmental, social and governance) investments outperformed their counterparts to give a strong indication that sustainable investing is here to stay.

The pandemic has forced people to rethink and reassess their priorities, and a growing appetite for change can be felt across the country. But it hasn't happened overnight. The move towards a bigger high street purpose has been gestating for some time and people want to see their local areas prioritise their community instead of distant shareholders.

High streets and town centres are reaching out for a sense of purpose. Now is the time to grab it.

BUILDING BACK BETTER

For all the ‘use it or lose it’ campaigns of recent years, willing people to support their local town centre, there’s one terrible irony that’s often overlooked. As high streets battle to revive dwindling footfall, it seems to have gone unnoticed that the planners, developers and custodians of our high streets have spent much of the last few decades determinedly designing out large sections of the community that they’re now begging to return.

Take Gen Z’s, a generation town centres should be looking to enthusiastically recruit if it’s to build any sustainable future. No other group has been the subject of such a concerted effort to drive them away from high streets. We’ve seen councils try to exclude young people through curfews, anti-child mosquito alarms and asking developers to ‘design’ them out of town centres. Whether it’s shopping centres banning hoodies or town centres banning skateboarding, the message is clear; young people are not welcome.

Similarly, in urban schemes across the country, young people rarely have any say in decision making. A report by the Royal Town Planning Institute last year concluded that the UK needed to do better in engaging children and young people in the planning process and that we compare poorly with many of our European counterparts. The Norwegian Planning and Building Act, for example, enshrines in law the need for local authorities to involve younger demographics.

The ‘nowhere to go’ refrain of young people will surely continue until planners recognise and include this essential demographic. On occasions we’ve seen glimpses of how this might work. Almost a decade ago now, Nike’s [‘The Pool’](#) temporary project saw a 1970s Dagenham swimming pool turned into one of the best

freestyle BMX parks outside of the U.S. Over 4,000 young people poured through the doors in a few weeks, and it gained legendary status before the council ripped it down and turned it into a car park.

We’ve also seen glimpses of what town centres will look like if young people’s needs continue to be ignored. The disturbing growth of county lines gangs is a phenomenon that’s fast laying down roots in town centres. Add to which the fact that a Nationwide Building Society survey showed over a quarter of primary age schoolchildren do not know what a high street is, and alarm bells should be ringing. This key British institution is in real danger of falling into irrelevance.

It’s not just young people that town centres no longer properly cater for. Older people also feel unwelcome. A report by the charity, Anchor, showed that 60% of older people are worried about the lack of seating that is provided in shopping areas for them to rest. The closure of public toilets, poorly lit areas and inadequate access to transport also contribute to an unwelcoming environment that’s at odds with the idea of age friendly neighbourhoods.

All this points to a drastic need to expand the role of the high street and break away from a stifling vision of civic life. If we’re going to ensure town centres and high streets meet local people’s needs and become vibrant, relevant spaces, then it’s time to remodel them around community. The first thing we should be looking at is giving community a stronger sense of ownership on the high street and our ‘unlocking spaces’ section explores this in depth.

We also need to open up streets, introduce more town centre housing and make our town centres more walkable, green and inviting spaces.



Initiatives to move away from a reliance on cars are essential. The Hub, on Stockton High Street is the UK's first active travel and secure cycle parking centre

For generations our urban areas have been designed exclusively around the car. But car dependence is no longer built inextricably into the fabric of towns and cities, and bold moves are being taken to make high streets more walkable and cycle friendly.

In cities around the world the pandemic has been the catalyst to address this. Extra bike lanes are being created, streets being permanently removed from maps and turned into park space, pavements widened, public spaces increased and streets pedestrianised. From Athens to Seattle, a blueprint is being developed to liberate public space from cars and make urban areas cleaner, greener and more walkable.

Ultimately, we must ensure town centres and high streets are tasked with the role of lifting communities, not draining them

Ultimately, we must ensure town centres and high streets are tasked with the role of lifting communities, not draining them. The proliferation of fast food takeaways, vape shops, payday lenders, betting shops and off licences have damaged communities and become a catalyst for public health, debt and addiction problems. Similar damage is caused by crowded public transport, long commuting times, gridlock on the roads and life shortening air pollution.

Moves to make streets repurposed for people not only stand to strengthen community bonds. It can also deliver massive public health benefits and realise the aims of the Government's Building Better, Building Beautiful Commission. The two are strongly linked. When Boris Johnson pledged to launch a renewed anti-obesity strategy recently, he acknowledged we need a much more interventionist drive to tackle poor health. There can be no better starting place for this than local high streets. They are over-supplied with unhealthy food choices and are predominantly inactive spaces. By encouraging cars and designing out walkability they have done little to move the dial on a sedentary culture.

Adopting the Building Better, Building Beautiful principles can help reverse this trend. We can make the planning system work to embrace better design and more attractive and aspirational public realm. No one baulks at the prospect of long walks on Las Ramblas in Barcelona or climbing stairs in Montmartre, Paris. That's because they

are beautiful places. Many of our high streets discourage walking because they're characterised by ugly, anti-social design and urban decay. They are places you want to spend as little time as possible in. The creation of more green space and better public realm can start to change this perception and make them attractive, walkable physical spaces.

These changes can be further complemented by steps to strengthen local food culture. With countries like Vietnam and Cambodia, for example, banning the export of rice in order to prioritise local populations, experts have called for policy makers to review supply chains and prioritise local food to create a more diverse, fairer and sustainable food supply.

Such a move would build on the great work already being done by foodie halls and artisanal food traders and potentially kickstart a local fresh food renaissance. On some high streets it is currently easier to buy heroin than fresh fruit – and this has to change.

Combined, interventions like people friendly transport policies, reimaged civic space, increased greenery and local food hubs can begin to redefine high streets through the lens of community. There is a growing appetite to reimagine towns this way, but we need to devolve power and money to a local level to begin an imaginative onslaught on a model that's run out of road.

Giving communities a bigger role is the only way to unlock their potential

Giving communities a bigger role is the only way to unlock their potential. A range of policies from adopting what the think tank Localis calls Community Value Charters, which require Councils to give communities a greater say in the benefits received in the commissioning of local services from commercial suppliers, to Citizen's Assemblies will be key. The latter policy is fast becoming a necessary tool to bridge the gulf between voters and politicians, and is already having some success.

President Macron of France, for example, used a version of this deliberative process in the direct democracy forums he set up to build a dialogue with the Gilets Jaunes movement. One of their requests is to curtail the growth of out of town retail centres to revive local shopping.

This dialogue is an essential first step to giving communities more control and ownership of their place. If the legacy of decades of high street policy is that communities have been designed out of their own high streets, the task of bringing them back from obsolescence is to design people back in.

This means giving them a stake, building in opportunity and meeting local needs. A visit to your high street shouldn't be an immediately forgettable brush-by experience. It should be *enriching*.

The challenge of building back better isn't about trying to restore outdated structures and propping up narrow vested interests. It's about drawing up a new intergenerational contract between all communities and local and central government. Ultimately, though, it's about a world beyond just retail. We've spent an enormous amount of energy over the last decade trying to work out how to keep an outdated model on life-support. It's time we expended that same energy and commitment on looking to the future.

UNLOCKING THE POTENTIAL OF BRITAIN'S HIGH STREETS

Moving away from an outdated high street model requires a different style of leadership, argues former Stockton-on-Tees Borough Council CEO, Neil Schneider

Who is responsible for helping Britain's high streets recover? Where does the buck stop? Is it the mandarins of Whitehall, the Government and ministers in Parliament? Or maybe business leaders, entrepreneurs and investors? Or is it local leaders in your town hall?

The truth is they all have a responsibility. But in my experience it's the latter group that really counts. I spent over 30-years in local government and, as Chief Executive of Stockton-On-Tees Borough Council, we were able to embark on a bold transformative plan to prepare our high streets for a world where retail was no longer the mainstay.

Our plan to shrink an oversupply of retail space, open up the country's widest high street, connecting it directly to the beautiful river, create more green space, demolish the Castlegate Shopping Centre and make the town an events destination feels even more relevant now. The job is far from finished, but there's a strong plan in place. We didn't wait for instructions or guidance from Westminster, we simply got on with it.



Stockton Castlegate Centre today and the vision for redevelopment





The multi-disciplinary and flexible town centre operations team in Stockton has created a strong sense of collaboration

This ought to be the norm. Local authorities are the custodians of place and they should have a better, deeper and more informed understanding of their place and communities. But sadly this isn't always the case.

The art of leadership is not without struggle, and all too frequently we're seeing the link between town halls, places and communities undermined by a leadership model that is increasingly failing to grasp and respond swiftly to the challenges of 21st century high streets.

Now, more so, with high street challenges and the task of revitalising battered post Covid-19 local economies greater than ever, we need to shake up town hall leadership and offer something different. Building trust in local democracy is a constant battle. You need to work at it every day and the only way to succeed is through leadership that keeps its finger on the pulse.

In their excellent book, 'Why Should Anyone Be Led by You?', Goffee and Jones explain how many institutions are unable to do this because they are set up to obstruct leadership.

"Many organisations desire leaders and leadership, but structure themselves in ways that kill leadership," they argue. "Far too many organisations are machines for the destruction of leadership. They encourage either conformists or role players." Councils are guilty of allowing this to happen on a grand scale. In looking to see a new generation of town hall leaders, I have been amazed and disappointed at how few appear either willing or able to take on these critical and exciting roles. Recruitment processes for very senior roles

Local government has encouraged a timid, overly cautious, safe-pair-of-hands, technocratic and process driven mindset for leadership roles — and it's totally ill-prepared for the challenges of the 21st century.

repeatedly deliver a narrow range of candidates. There is a lack of diversity in both political and executive roles. As Matthew Syed emphasises in his illuminating book 'Rebel Ideas', diversity of people, of thinking and of ideas can challenge hierarchies and bureaucracies and help to solve complex tough problems - just like those we face on our high streets.

The time when all high streets had more or less the same shops and a 'clone town' model prevailed is over. It's no longer the boardrooms of multinational brands that determine what our high streets look like. If leaders are going to unlock the potential of their own unique places and break away from identikit Britain they'll need to immerse themselves in their town. You need to understand the place, be properly committed to your community and live and breathe civic pride, emotionally connecting to the place and its people, showing every day you really do care. When our non-league team, Stockton Town, made it to the FA Vase final, we put on a proper event in the town centre. It shouldn't only be

the big teams that get parades. People loved it. And above all, we need to see more visible leadership.

No one should be afraid of having a conversation over the aisle in Sainsbury's with the public wanting to know why you're blowing up a shopping centre!

No one should be afraid of having a conversation over the aisle in Sainsbury's with the public wanting to know why you're blowing up a shopping centre! I remember being confronted by the public on more than one occasion and needing to have tough conversations. I had to remind them that a lot of the shops in there had gone bust and weren't coming back. Many hark back to a golden age of high streets and this still exerts a powerful nostalgic pull. But we can't live in the past and you have to level with people and try to explain the future. I found people respected this. They listened and tended to agree. Most of them admitted they did a lot of shopping online and could understand the challenges we faced. It will take time, but one day I hope we'll stop judging high streets solely against retail criteria. The 'has it got a Waitrose or a Next' checklist isn't helpful. Leaders have got to encourage people to stop measuring everything against the past and think differently. Instead of asking what brands are on your high street, I want people to ask what great experiences can you have there and how strong is the community.

Honesty, transparency and continual engagement is the starting point to achieving this change. And

this approach needs to be combined with a bolder style of leadership that's creative, collaborative and sometimes takes risks. The Treasury's 'Green Book' spending rules stymie creative thinking and we urgently need Rishi Sunak to complete his promised review and let our leaders off the leash. I instinctively understood how local high streets resonated with people. Just before the pandemic struck, the respected think tank, UPP Foundation, carried out a survey, which asked people what the biggest challenge facing their area was. After housing on 49%, the second biggest issue was high streets on 48%. Ask anyone about their local high street and they'll have a view. And quite often a strong and emotional one. It's a valence issue that's been ignored for too long. But to build confidence in the recovery and transformation of our high streets, our local leaders will need to stop the pointing-the-finger blame game and be more collaborative. There are no easy solutions. Lots of people need to come together to hammer out local solutions. It requires grown up politics.

Above all, though, we're going to need more leaders to step up. These might be politicians, chief executives, BID or town team chairs. It doesn't really matter so long as they are effective leaders for their towns. The role is secondary to the qualities needed. Fortunately in Stockton there is vision and committed political leadership of the council who have stepped in, won hearts and minds, invested in their town centres and launched huge transformational change.

Sadly, though, some leaders still measure success as surviving and remaining in their job. There really is no space for that kind of thinking anymore. Success is about breathing life back into our high streets. Technology is driving change at such a pace that the bureaucratic structures and traditional leadership styles can no longer keep up. They're not flexible or brave enough – and the longer they stay in place the less chance they'll have of ensuring their high streets have a proper future. And that should be the prize everyone stays focused on. I don't believe our best days are behind us. Britain's high streets can still have a bright future and so much depends on this. Strong high streets can build communities, keep crime at bay, foster civic pride and togetherness. They make an area worth living in. All of this is within reach. It's a future that, together, we can build. But we need our leaders to break out of a conformist strait-jacket first.

A RADICAL SHIFT IN PLANNING POLICY

COVID-19 has added a further layer of challenge and complexity to the design and planning of our town centres. As previous editions of the Grimsey Review have highlighted, high streets and town centres already find themselves on a trajectory of significant change and re-structuring. Market conditions and sectoral dynamics continue to shift rapidly, and the current public health situation is likely to exacerbate and accelerate this change. It seems inevitable that high streets will look very different when we emerge in a post-COVID-19 world.

Many commentators have attempted to describe how the current and post-COVID-19 world might look and feel, neatly encapsulated as the idea of “a new normal”. However, while economies, places and mindsets might change during this period of enforced reflection, it seems likely that essential traits and behaviours will endure. The adaptation needed post-COVID-19 can align well with climate objectives to change habits for the better.

Planning policy and delivery

The National Planning Policy Framework (NPPF) is no way restrictive; future planning policy guidance will need to direct local authorities to review and update local plans. Leadership flexibility, imagination, and speed in decision making will be required from interdisciplinary teams, to manage significant change.

Public Health, Environmental Health and Trading Standards have key roles in the creation of safe

town centres and government should establish a safety kite mark. A recent Which report called for greater transparency about food hygiene standards with around 2.4 million people in the UK suffering foodborne disease each year. ‘Brand hygiene’ will take on a new meaning - and food and general hygiene ratings for town centres will be paramount in the decisions made by consumers.

Town centre policies will need to predict the future, not rely on historic evidence. Currently planning policy can take two years to work through the system. The myriad of pre-planning meetings in search of fee income should be streamlined. The capability of local authority planning services should be enhanced with expertise and increased delegated powers.

It is time for planning policy to experience a radical shift to reflect the need for economic and social resilience. Surgical intervention to tackle empty buildings using CPOs and other regulation powers will be required. There should be serious consideration of relocating public assets to the town centre and for the high street becoming an enterprise zone.

Public action in a world of private ownership can be delivered best through collaboration, which already exists in many local authority areas. One example is Future Place, a partnership for sustainable placemaking established by the Royal Institute for British Architects (RIBA). The programme demonstrates what can be achieved when professional knowledge and expertise is applied to the challenges facing town centres. The Grimsey Review Two argued the case for the establishment of a web-based knowledge system, to share good practice.

Sustainable and adaptable - economic and social resilience

Most, if not all, professionals are discussing design solutions for the new normal. The Grimsey Review team has engaged with several leading architectural practices to seek their views.

Allies and Morrison have stressed the importance of adaptable, loose fit design to new buildings, enabling response to economic/cultural shifts in terms of changing uses or occupational patterns.

In planning for the long term, it will be important to provide people with the means of living with lower daily expenditure. For master planning and architecture, this would require more flexibility in the planning system, particularly to allow ease of movement from traditional retail towards alternative ground floor uses such as community groups, educational institutions, leisure or workspace - activities which could all be meanwhile or temporary uses, playing a role in rejuvenating both the high street and local communities they serve.

BDP's placemaking team have been developing a social distancing strategy for streets and spaces to help urban centres adjust to the new environment. The repurposing of streets is a key element of the strategy and will accelerate the transition to a greener and healthier place for people. Soho Estates has urged Westminster Council to close streets in Soho to create alfresco dining, following examples from New York of taking streets off the map.

HTA supports knowledge sharing through the Future Place programme (Future Place 2019 report) which shares practical place shaping knowledge with local authorities and placemaking professionals. This digital resource has been designed to help identify the key challenges relevant to place, and to stimulate new placemaking solutions.

Gensler argues the case for architectural optimism in new design and reimagining buildings. The technology and building components already exist to meet the design requirements of the new normal. In the design of buildings in China, the practice has integrated facial recognition technology into lobby security kiosks and touchless access to all areas. In other schemes LED lights map out social distancing with digital wayfinding to support queuing, double skin glass panels are fitted with sensors to let in fresh air.

There will be an inevitable shift in mobility patterns with a requirement for greater walking space and cycling infrastructure. There is a need to adapt our town centres and urban environments to provide safe and functioning space, creating and reshaping the public realm. Spatial analysis by Esri UK has found that most pavements around the country are less than 3m, with 34% less than 2m.

Residential growth in town centres must be accompanied by improvements in the quality and quantity of amenity space.

Green space has never been more valued and should be an essential part of any town centre plan and design brief

Green space has never been more valued and should be an essential part of any town centre plan and design brief. Garden squares, small parks, tree lined pedestrian routes and landscaped areas all contribute to civic pride.

The Garden City movement was a social revolution in part responding to the lack of sanitation and hygiene resulting from very poor overcrowded living conditions in cities. The new normal could prompt another social revolution focused on hyper localism powered by community involvement.



Bradford City Park is a multi-award winning public space and catalyst for the regeneration of the City



In Roeselare, Belgium, the mayor has turned a major car park into green space to encourage community interaction.

UNLOCKING SPACES

While there's a growing consensus around the need for high streets to move to a community hub model in order to meet 21st century needs, there are still many obstacles to progress. The biggest of these remains the high street property market.

Pre-pandemic, the high street property market was already crying out for change – with 12% of UK shops vacant in March 2020, and [nearly half](#) of all UK high street property in the hands of distant real estate companies, overseas investors and other investment funds. COVID-19 has both lifted the lid on the issue, and made it more acute. Retail floor space is estimated to shrink by as much as 80% across the country; a result of the pandemic combined with the underlying trend of decline. Shopping centre giant Intu has put administrators on [standby](#), with others likely to follow suit.

Now, with mutual aid groups blossoming and volunteer lists oversubscribed, the time is ripe for locally-powered businesses and other community activity to establish stronger roots on our high streets. But the biggest problem preventing this is a lack of access to affordable, secure, long-term property.

Prior to COVID-19, where communities did manage to access affordable, secure and long-term properties, the results were remarkable.

Take [Every One Every Day](#) in Barking & Dagenham, East London – incubating 250+ local businesses, from open access makerspaces to childcare cooperatives in unused council shops. Just look at [Onion Collective](#) in Watchet, a deprived seaside town in Somerset, where a group of six local women kickstarted a community arts centre, then a heritage museum, and more recently a [green manufacturing plant](#) in the old paper mill. Or [Homebaked](#) in Liverpool, a community land trust and cooperative bakery that is developing

'long-term, affordable and secure housing' and 'real shops and amenities for local people and visitors alike.' So what needs to shift in the property market to support this kind of activity to thrive everywhere?

Traditional rent-setting does not support a diverse 'community hub' high street

When it comes to rents, local businesses and services that together make up a healthy high street ecosystem, have a range of abilities to pay. A co-working space is typically able to pay more rent per square metre than a repair shop, but less than a supermarket. An events space can pay more than a community bakery, though less than a pub. A GP surgery arguably shouldn't pay any rent at all, whilst an urban farm might be able to make a contribution by providing apprenticeships for young people rather than paying rent.

But this reality is in tension with the way private landlords, surveyors, and to some extent local authorities, currently calculate rents – using evidence of rents achieved from letting comparable properties. This means that regardless of the financial position of local businesses, rents are still set according to the highest bidder's ability to pay – often supermarkets, coffee shop chains or betting shops. Hence their prevalence on our high streets, and the relative absence of other types of services.

Furthermore, high and inflexible rents reduce the ability of local businesses to invest in their community. This is summarised by Diye Wariebi, owner of Bright Sparks reuse and repair shops in North-East London: *“If we didn’t have the pressure of paying rent [in two of our three stores], we’d be able to experiment a lot more. For example, we want to host a Library of Things and repair cafes. We’d pay our staff more, offer more volunteer opportunities, create more jobs.”*

This is in contrast to Diye’s third store, provided rent-free by L&Q housing association. There, Bright Sparks host a food bank, coffee mornings and other community activities within their second-hand goods shop, because they don’t have to put all their energy into making sales to cover the rent.

Who owns our high streets anyway?

It can be very difficult to find out who owns UK high street property, and even harder to contact them. Despite the recent emergence of private companies like [Land Tech](#) that allow you to pay to access certain ownership data, the widespread practice of buying properties through offshore-registered companies makes the ultimate owner hard to trace.

When planning the regeneration of Stockton-upon-Tees town centre, the then CEO (and co-author of this supplement) Neil Schneider encountered exactly this issue. *“It was like a forensic investigation – we had to assemble an entire team to work out who owned Stockton.”*

For a local person wanting to start a small business, this can be mystifying. Abi Nolan, founder of affordable neighbourhood yoga studio [Supply Yoga](#), was on a long, unforgiving search for an affordable East London home for her social enterprise after receiving notice on her former space. *“It’s so hard to find out who owns [these spaces] - who do I contact, how do I penetrate this wall of boarded-up shops that I could make an impact on?”*

Access to ultimate ownership information could be improved through increased transparency from the UK Land Registry. It has already started to release data on corporate & commercial property ownership, but this data is incomplete and far from user-friendly. The Land Registry could do as Companies House has done for company ownership and open up its full dataset, for free, on who owns all high street property and land in the UK.

Investing in property as a platform for local benefit

In a post-COVID and post-retail world, we need to think of property as a platform to enable meaningful work, local trade, wellbeing, belonging and so on.

In a post-COVID and post-retail world, we need to think of property as a platform to enable meaningful work, local trade, wellbeing, belonging and so on. Community trusts and local authorities could be well-placed to provide this platform – if they can a) ensure unused properties come onto the market in the first place b) access suitable capital to buy them and c) ensure properties are used for local benefit, rather than for purely revenue-generating purposes.

Community trusts are one of the best vehicles for buying and managing properties for local benefit, for the long-term. Community ownership has become particularly popular for properties housing local services like pubs, shops, workspaces, theatres and even skateparks. This model means communities decide for themselves on rents and tenant mix – rather than a disparate group of distant commercial landlords, or a local authority looking to maximise yields. They are also [more likely](#) to hire those who may otherwise struggle to access the employment market, boost local economies by procuring from other local businesses, and create additional benefits like community cohesion. Take the community trust East Brighton Trust, which owns a number of properties for community benefit in the Brighton area. One of their properties accommodates community pub The Bevy on Moulsecoomb housing estate. Without the pressure of rents to pay or potential eviction notices, The Bevy is able to invest in apprenticeship schemes, food growing, dementia cafes, cooking lessons, music nights and so on.

Prior to the pandemic, some local authorities had invested in high street properties for local benefit – and it paid off. In Bristol, where the public sector owns a record [94% of shops](#), small business is flourishing. The colourful Gloucester Road is proud to be one of the UK's longest stretches of independent shops, plus local currency, Bristol Pound, can be spent at over 750 independent businesses in the city.

However, local authority investment in high street property often does not aim to create local benefit, seeking to instead maximise financial return to offset budget cuts. York Council, for example, owns 70 per cent of units on the Shambles, one of the best preserved medieval streets in the world, and has been criticized by traders for increasing rents by 10 per cent. This came during a year the British Retail Consortium described as the worst on record for retail.

According to a National Audit Office report, nearly half of properties bought in 2018-19 (by value), fell outside of the geographical boundaries of the 45 local authorities reviewed. This implies that financial yield was the primary motivation for purchase. Not only is commercial property a questionable investment for local authorities in light of the pandemic, with even the largest retail

and hospitality chains [negotiating](#) rent reductions – it is also fundamentally incompatible with a 'community hub' high street model.

To truly support local economies to build back better post-COVID, local authorities need to ensure properties are used primarily for local benefit. Commercial leases should arguably be replaced with long-term Collaboration Agreements, where both council and space occupier work together to meet predefined local needs.

High rents must give way to flexible revenue- or profit-share arrangements

High rents must give way to flexible revenue - or profit-share arrangements – as practiced by high street social enterprise [Library of Things](#).



The women-led circular economy start-up, [Library of Things](#), is an example of new community-led ventures establishing a high street presence

In May 2020, the Treasury proposed a ban on property investment by local authorities, with one spokesman saying: “Local authorities should invest public money in regeneration, housing and delivering services, not in speculative commercial investments which can put local and national taxpayers at risk.”

We believe there is a case for local authorities being allowed to invest in high street property, on the condition that such property is used to create long-term local economic, social and/or environmental benefit. To hold local authorities accountable to this, we propose a practice where one or more local community stakeholders can have significant input at key points in the contracting process (such as deciding level of rent contribution, tenant mix, contract length etc.)

Will the price of high street property rise or fall?

There has been a need for a price correction on all rental commercial properties in town centres since the last Grimsey Review was published in 2018.

There has been a need for a price correction on all rental commercial properties in town centres since the last Grimsey Review was published in 2018.

This can be evidenced by the increase in CVA's used in order to try and renegotiate rents. If Covid-19 is to hasten this process, that would be a good thing for everyone. The pandemic, therefore, could make it cheaper for community trusts and/or local authorities to buy up high street properties – though it is still too early to tell whether the property market will rise or fall.

Mark Walton, co-founder of land and commons think and do tank Shared Assets said, *“There's a chance the property market will crash as rents come down and some landlords go out of business, providing an opportunity for communities and local authorities to sweep up assets.”*

Though, as Mark points out, in order to buy such properties, we need to make sure properties do come back onto the market: *“Landlords could also hold onto properties in the hope of better times, where you'd run the risk of boarded-up high streets for years.”*

How do we ensure unused properties come back onto the market?

In Scotland, a new set of [Community Right to Buy](#) laws gives community groups the right to buy property and land regardless of whether the owner is willing to sell - especially for 'abandoned, neglected or detrimental land'. Community ownership in Scotland is now [on the rise](#), and the Scottish Government is holding itself accountable to supporting this - by making community ownership a [National Indicator](#).

Something similar will be crucial in enabling local authorities and communities in the rest of the UK to ensure unused properties come onto the market – and avoid more years of boarded up shops.

How do community trusts access suitable capital to buy local property?

The [Scottish Land Fund](#) “offers grants of up to £1 million to help communities take ownership of the land and buildings that matter to them”. It is funded by the Scottish Government in partnership with National Lottery Community Fund and Highlands and Islands Enterprise.

Local Trust’s [Big Local](#), funded by the National Lottery Community Fund, has started something similar in England. The programme has supported local people to set up community trusts in 150 of the most deprived towns in England, and funded them to the tune of £1 million each to invest in properties and other assets. This has spawned a proliferation of community libraries, sports centres, pubs and other hubs, [with far-reaching benefits](#) and a multiplier effect for local town centres and communities.

This approach is working, but an expansion to the other [949](#) town and city centres in the UK, would require further investment to the tune of hundreds of millions of pounds. Power to Change [called for](#) £250 million over the next five years, to be taken

from the £3.6 billion [Towns Fund](#) announced by the government in September 2019. “*This would mean at least 800 commercial properties moving into community ownership, kickstarting a radical shift in high street ownership around the country*”. This fund could also be matched through independent foundations, dormant bank accounts, regional development funds, and so on.

How do local authorities access suitable capital to buy local property?

As above, we believe local authorities should be able to continue to invest in high street property, on the condition that it is then made available for local benefit. So far, cheap borrowing has been important in supporting local authorities to invest in property. We expect this to remain the case for local authority buying properties for local benefit, rather than commercial return. To enable this, the Public Works Loan Board (the main lender to local authorities, administered by Treasury), should ensure the terms of such loans are cheap, patient, flexible and long-term – and ultimately conditional on the property creating local benefits. By investing in property as a platform, it is highly likely that other costs to the public purse will decrease over time – whether costs of care for older adults, homelessness, or environment and public realm.

CONCLUSION

Ultimately, if high street property is in local hands, it is then connected to and accountable to that community. Rents are proportionate to local ability to pay, the mix of occupiers is diverse and reflects local needs, and high streets can be resilient and responsive in times of crisis.

**Case studies:
significant progress Pre-COVID-19 and
some reflections on how COVID-19
might challenge this progress**

CREATING A SUPPORTIVE ENVIRONMENT

a. The importance of the community ‘hub’

A key recommendation from GR2 was to ‘urgently repopulate and refashion high streets and town centres as ‘community hubs’, including housing, health and leisure, entertainment, education, arts, business/office space and some shops (p.8). In a recent report, (i) the government reinforced this recommendation with its vision for high streets and town centres in 2030. It called for ‘activity-based community gathering places where retail is a smaller part of a wider range of uses and activities and where green space, leisure, arts and culture and health and social care services

combine with housing to create a space based on social and community interactions’. There are many examples of how forward thinking councils have already been moving in the right direction, thinking creatively about how to reconfigure towns as community ‘hubs’. In many cases, although retail still plays a role in the ‘hub’ solution, councils are looking to other services, facilities and experiences to drive footfall.

Exhibits 1 and 2 illustrate how leisure and arts are driving footfall in two locations.

USING LEISURE, ARTS AND CULTURE TO DRIVE FOOTFALL

Exhibit 1

Regenerating Hoylake on the Wirral. Plans for The Beacon Arts Village; a place to live, create, eat and be entertained

The Beacon Arts Village is a dynamic regeneration project for Hoylake and West Wirral, creating jobs and increasing footfall. Based around a hub for artists and makers, cinema, atrium café and fine dining restaurant, it will provide new sustainable opportunities and serve as a catalyst for regeneration.

The Beacon Arts Village will be a lively mixed-use destination that stimulates year-round footfall, seven days a week. Anchored by a cinema showing a wide-range of content, residential units and creative industry studios will complement the scheme.

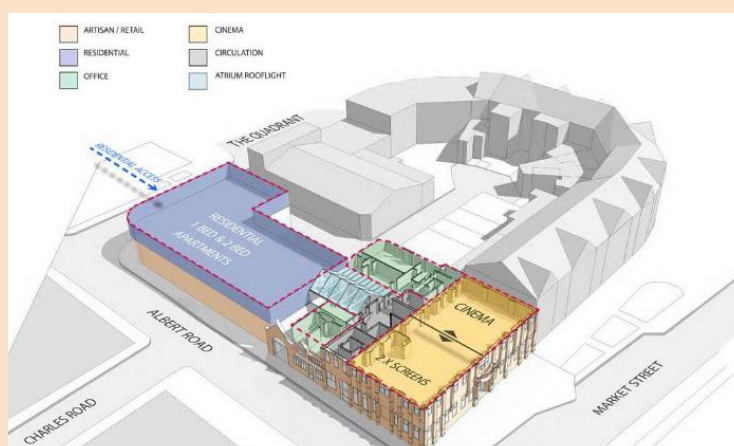
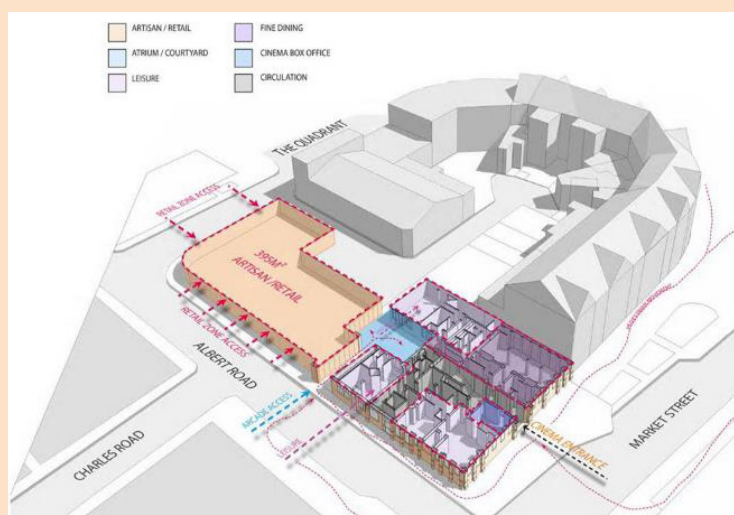


Exhibit 2

How Krowji, Cornwall's first creative hub, is helping to regenerate Redruth

Krowji, Cornwall's first creative hub, was established in 2005 using a redundant old grammar school site on the edge of the town. Over 15 years it has grown into a 45,000 square foot complex of studios, workspaces, meeting rooms and a café with upwards of 200 creative practitioners based on site, working right across the spectrum of the cultural and creative sectors. Krowji has supported and enabled the gradual regeneration of Redruth town centre, which includes neighbourhoods in the top 10% most deprived areas of England. It is part of the 'spine' of Cornwall, off the tourist track and has been in steady decline since the closure of the mining industry in Cornwall.



Culture and creativity are central to the regeneration strategy for the town. Krowji originally used empty shops as art-spaces, but now increasingly works with new creative businesses (galleries, workspaces, residency spaces, shops etc) basing themselves in the centre. A linked organisation, Redruth Revival, bought the dilapidated Buttermarket complex in 2017 and has starting transforming that into a thriving town centre workspace and niche retail/café/ market square: that project currently houses about 20 tenants and is just embarking on a £1.5 million refurbishment part-funded by the High Street Heritage Action Zone scheme. Krowji has collaborated with the Town Council to encourage the growth of street festivals involving schools, local people and local artists. The two illustrations shown the Pasty and Mining Festival (above) and the Spaceman festival 2019 (left).

Others are thinking creatively about how to embed health and well-being into the community 'hub'. 65 High Street, Nailsea (exhibit 3) is a digital learning centre designed to help those within the community who need support to access technology to support health and well-being needs. It is supported by Nailsea town council and has bought the health agenda directly into the high street. The hub provides technology and guidance for users to develop their skills and confidence.

Help ranges from support for shopping online and contacting friends and family to ordering a repeat prescription, accessing information on medical conditions and choosing a preferred hospital provider for surgery or appointment. No 65 is a very 'informal' place, run by volunteers.

<https://www.nailseatown.com/find-out-more-about-nailsea-place-and-65-high-street/>

Exhibit 3

65 High Street, Nailsea; developing digital self-help health capability in the High Street



Several retailers and service providers are considering how they can explicitly connect to community health concerns. Jacamo, for example, the online mens' retailer recently collaborated with the Book of Man, to stage an Arm-in-Arms event in a London Pub to talk about what it means to be a 2020 man. Jacamo talked with a panel of well-known faces about body confidence, definitions of masculinity, advertising, stereotypes and the impact it has on mental health. The idea was to

encourage men to enjoy a craft ale, live gigs and a free trim from the barber but also have an open debate about the issues faced by modern men. The retailer claims to be offering an 'opportunity to be in a safe place and engage in discussion on what it means to be a man in today's world'.

<https://www.jacamo.co.uk/shop/page/arm-in-arms-the-man-ual-2019-survey/show.action>

Many councils are also now recognising the health benefits of preserving and curating green space within the 'community hub'. There are many good examples of this. Exhibit 4 illustrates a radical transformation of public realm in Roeselare, the small town in West Flanders, featured in GR2. Here

one of the city squares in the town centre has been transformed from a car park to a green community space. In collaboration with 1010 Architecture Urbanism, BOOM Landscape redesigned the city square as part of a plan for a belt of green spaces to thread through the city.

Exhibit 4

Roeselare; creating and preserving green space to encourage community interaction. De Coninkplein (square) (then and now)



The provision of green space features strongly in the radical plans of Stockton council to transform its retail core. In 2019, the Council acquired the two main shopping centres in Stockton town centre, Wellington Square and Castlegate Shopping Centre at a cost of around £23million. Both centres comprise 450,000ft² of floor space and currently suffer from a vacancy rate of 29% and 28% respectively. The Council acquired the centres to take control of these key assets and facilitate the transformational change required to address the structural imbalance of an over provision of retail

floor space in Stockton versus demand from retail and non-retail uses. The Council plans to relocate businesses from Castlegate Centre into Wellington Square and other High Street units in order to create a sustainable retail footprint. The Castlegate Centre will be demolished and a new civic hub created along with high quality urban park, which will provide a direct link to the River Tees from the High Street and enable a greater diversification of uses on the site in the future. Exhibit 5: illustrates the Castlegate centre today and the massive outdoor park planned for the future.

Exhibit 5

Stockton; Castlegate Centre today and the vision for redevelopment



CREATING A 'DISTINCTIVE' COMMUNITY HUB

The findings from GR2 emphasised the importance of carefully curating the 'hub' to reinforce its distinctive heritage and point of difference. Exhibit 6 illustrates how heritage plays a key role in regeneration in Paisley.

Exhibit 6 Building on Paisley's heritage: the work of the Paisley Community Trust

Paisley Community Trust (PCT) is a registered Scottish Charitable Incorporated Organisation founded in 2014, focused on community driven economic regeneration of Paisley. In partnership with local communities, gathers views, issues and ideas for the future of the town in collaboration with Renfrewshire Council and other key stakeholders in Paisley. PCT believe in community owning the high street and playing a leading part in its cultural, social, and economic renaissance. Creating and discovering new town centre places and environments for communities to gather and spend time are vital component parts to ensure mental health, wellbeing and human resilience are tangible outcomes of a strategic approach to regeneration. Regeneration efforts also focus on the unique aspects of Paisley's heritage. Nestled in close proximity to neighbouring city Glasgow; with the river Cart running through and flowing past its centuries old Abbey,



It is a place fortunate enough to have a rich and compelling story, a largely untold story of radicalism, weaving, thread manufacture and much, much more. It is a story ready to be nurtured and presented to the world.

Heritage is Paisley's anchor and foundation to build onto, surprisingly second only to Edinburgh in listed buildings in Scotland, it has an impressive architectural legacy. One project Paisley Community Trust have spearheaded, is the drive to bring a community cinema back into the town centre in conjunction with Renfrewshire Council. Paisley's community owned Cinema will be a social space at the heart of the community rather than an out of town site, with a purpose to reconnect socially isolated individuals of all ages, circumstances (including financial circumstances) and abilities, making cinema accessible for all.

As well as direct benefit to individuals and the immediate place, it has potential to provide considerable economic regeneration in the town. It will contribute to improving the built environment, supporting wider town centre regeneration programmes, and encourage wealth creation by having a local and social supply chain and bringing income to local businesses. The community-focused cinema has an important role to play in the town and is a core part of the "Paisley Vision".

<http://www.renfrewshire.gov.uk/paisleyvision>



Exhibit 7 illustrates how Cherwell District Council is curating Banbury Town centre as a destination for sustainable food.

Exhibit 7

Lock 29 Banbury

The Council is direct delivering a new canalside leisure quarter, [Lock 29](#). Located in a repurposed BHS unit at Banbury's Castle Quay Shopping Centre, Lock29 will be a multi-use venue centred primarily on quality food and drink. It is set to be Happerley England's only National Centre for Food Provenance, the objective is to deliver full transparency across the industry by empowering consumers with a complete picture of the journey of all produce, from farm to plate. The future looks promising for the Lock, given the renewed focus on sustainable supply chains and local sourcing bought about by COVID-19.



b. Engaging with the community

Both reviews, and many of the examples above emphasise the importance of drawing on the skills, knowledge and enthusiasm of local community members when curating the community 'hub' solution. Applications for Government funding through the Future High Streetⁱ and Towns Fundⁱⁱ bids formally recognise the importance of this contribution and require applicants to outline explicit plans for community engagement.

Many individual town centre retailers had already achieved success here by transitioning their offer from a focus solely on the provision of physical goods to offering services. A baker for example who can offer master baking classes as well as bakery products is able to physically bring people into the town, engage the expertise and enthusiasm of consumers and help members of the community develop new skills. Doncasters, an independent butchers in Southwall in Nottinghamshire, has successfully used this strategy to diversify the business. Customers are offered master butchery classes in addition to traditional products and services.

<https://www.fdoncaster.com/butchery-masterclasses-with-f-doncaster-ltd/>

This is a trend that looks set to continue with many 'many high street communities providing a diverse range of businesses, services and events in order to attract people. The idea is that they will spend not just their money, but their time.'^{vii}.

The last review highlighted the importance of markets as an effective way of capturing the passion, enthusiasm and emotional responses of residents. A recent report^{iv} by the Institute of place Management highlighted 25 reasons why markets are economically, socially and politically critical for town centres. As well as generating footfall increases of around 25%, markets have been

shown to increase retail sales, with significant numbers (55%-71%) of market visitors spending money in other shops. In addition, markets, with low barriers to entry, are excellent business incubators, nurturing retail innovation and diversification. There are many examples of new market initiatives developed prior to the onset of the pandemic. See for example, exhibit 8 features the Picturedrome a food emporium developed in Macclesfield.

“Many individual town centre retailers had already achieved success here by transitioning their offer from a focus solely on the provision of physical goods to offering services”

Exhibit 8

The Picturedrome in Macclesfield

The Picturedrome is an indoor food emporium located in a disused cinema in the centre of the town. It was developed in 2019 by the organisers of Mackie Mayor and Altrincham Market, and transformed into a paradise for the food lovers of Macclesfield.

A board outside claims that it is 'home to over seven outstanding kitchens, a coffee shop, chocolatier, craft beer bar, and wine bar and merchant and represents an 'attempt to enrich lives by providing high-quality, everyday food in a social setting – where families, friends, and strangers get together around shared tables and 'break bread'. Inside, the Picturedrome has a very similar feel to the much larger Time Out Market in Lisbon Portugal.

Established in 2014, this attracts more than 4 million visitors each year and houses 32 restaurants and bars under one roof. The illustration on the right is the old cinema in Macclesfield and below is the busy Time Out market in Lisbon.



Despite an increasing recognition of the importance of markets in town centre regeneration, there are concerns that the sector urgently needs more investment. Challenges include slow response to technological innovation, poor and outdated physical infrastructure, high customer expectations and lack of new traders.

Events also continue to play a crucial role in generating footfall and community engagement. Weymouth for example is a town with a long-established history and tradition of hosting Events and Festivals. These range from international events placing the town on the World stage, to community events that bring animation to the destination as well as underpinning the well-being and cohesion of the local community.

According to Ed Warr, Weymouth Town Centre Manager, 'direct community involvement in such events, as the start of the Cutty Sark Tall Ships Race in 1994, the 16 day Millennium Festival in 2000 and the sailing events for the London 2012 Olympic and Paralympic Games have all inspired the community to establish their own events that celebrate the place and people and act as a catalyst for developing a strong community and enable vibrancy and pride in the location' .

IMPACT OF COVID-19 ON THE NEED TO CREATE A SUPPORTIVE ENVIRONMENT

For a number of reasons, the onset of COVID-19 has both reinforced the importance of curating our towns as community hub solutions as well as increased the urgency of this call to action.

First, the switch by many consumers to online shopping during the pandemic will undoubtedly accelerate the rapid decline of traditional high street shops selling comparison goods. A recent survey of 2000 shoppers found that two-thirds of shoppers said that during the pandemic, they had switched to purchasing products online they have always previously purchased in-store.^v Although this online shopping behaviour been described as 'forced' behaviour the fact that a whole new segment of the population have now acquired the skills to engage online and will have experienced some of the convenience benefits, means that a large percentage are likely to remain post COVID-19.

Many national and multinational retailers are likely to accelerate the withdrawal of their physical presence in town centres. Building on success prior to the pandemic, independents offering innovative and distinctive food, experiential and community-based services will continue to underpin town centre survival. 'High streets will continue their transformation into places to be and be seen in rather than simply places to shop.'^{xii} The need to

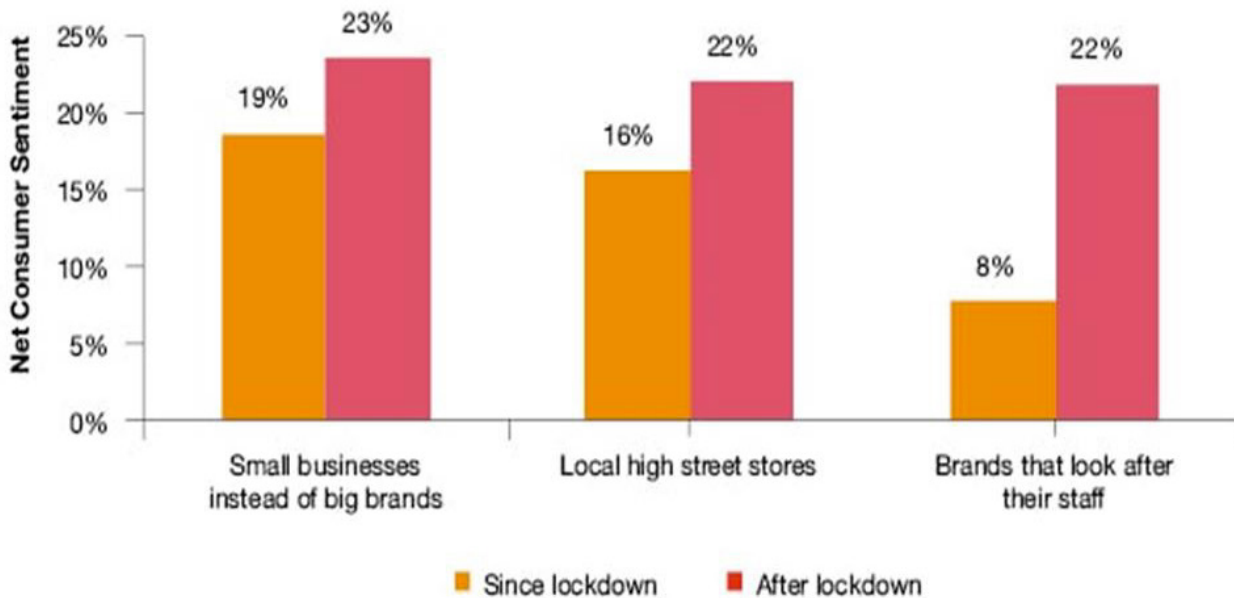
reduce the dominance of 'traditional' retail in the community 'hub' and give consumers other reasons to visit towns is more critical than ever.

Second, behaviour during the pandemic suggest that consumers will emerge with a stronger sense of community. The suggestion is that this could translate into an increased propensity and desire to support local traders, with consumers picking up goods from local high street stores rather than traveling further afield. A recent survey of consumption patterns and behaviour during lockdown supports the emergence of this community spirit.^v Thirty percent of consumers claim to be supporting local businesses more, a trend that is likely to continue if the anticipated increase in home working continues (see figure 1).



Figure 1

The recent PwC sentiment survey reinforces the same trend illustrating the consumers' enthusiasm for shopping locally and supporting small businesses during lockdown (see figure 2).



Source: PwC Consumer Sentiment Survey

There are many places with campaigns in place to capitalise on this consumer desire to shop locally before lockdown. See for example the poster for the SHOP LOCAL group in Southwell. There is evidence that these campaigns are being reenergised post COVID.

Third, capitalising on this increased sense of community, it will be more important for towns and businesses to engage creatively with members of their local communities and facilitate opportunities for members to engage with each other. During the pandemic consumers and businesses have spent time developing new skills and expertise, which they are now going to want to maintain, demonstrate and share. Many consumers for example, are more knowledgeable about cooking, knitting, sewing, entertaining in virtual environments as well as shopping online. This presents a real opportunity for towns to capitalise on this new knowledge when creating and delivering experiences.



Similarly, many retail business owners have learnt new skills and knowledge in order to survive during the pandemic. Convenience retailers, have been praised for their agility, with 38% now capable of providing efficient home delivery services versus only 12% before the pandemic.^{vi} Independent retailers have quickly learnt how to operate online and manufacturers how to become retailers

<https://news.sky.com/story/coronavirus-the-cheese-craftsman-turned-milkman-to-help-northernirelands-isolated-neighbours-11978285>

This vertical integration is likely to continue post COVID with businesses exploring different ways to repackage goods and reach different markets. Retailers have also integrated horizontally venturing into different product areas e.g. the Subway chain moving into grocery retail. With this new expertise comes the potential for greater collaboration across all areas of the distribution network. Each community will be able to identify examples of innovative practice and entrepreneurship, which

have enabled businesses to survive. One of the most pressing tasks post COVID, is to identify, reward and nurture these initiatives. Exhibit 9 illustrates the agility of retailers in just one location. Southwell, a town in Nottinghamshire, England. It is the site of Southwell Minster, the cathedral of the Anglican Diocese of Southwell and Nottingham and has a population of around 7,000. The town has been running a very successful traders group, The Shop Southwell group, since 2013. It was originally set up to organise a Christmas late night shopping evening which has since become the biggest annual event in the town attracting hundreds of shoppers to Southwell. Shop Southwell works to promote the idea of its town as a retail destination with its unique range of high quality independent shops. Close liaison with the town's tourist attractions, including its beautiful Minster, as well as the local schools and social groups have all ensured customer loyalty and a strong community identity.

Exhibit 9

‘SHOP SOUTHWELL’ ADAPTING TO COVID 19 ON THE HIGH STREET

**By Sarah Payne (Tourism
and Business Support
Officer) Newark and
Sherwood District Council**

For all the difficulties and negatives that the Covid 19 pandemic has brought to our high street what has been striking is the resilience and determination of the ‘Shop Southwell’ retailers to adapt and keep going. This is not only born out of necessity but also a passion for and belief in their businesses and the wish to come through it and

Whilst our essential shops – a small Co-op, Lloyds and Boots plus a post office, pet shop and two butchers have all been far busier than usual, the majority are still awaiting June 15th and the hope of being able to reopen again. In the meantime, some have switched to online sales and home delivery services, in many cases not something they ever did previously. The experience has convinced a large number very quickly that this is likely to be the preferred way of shopping for many in the foreseeable future and plan to keep it as a permanent aspect of their offer.

Many businesses have changed the way they sell or provide services as well as the range of products sold. Often home delivery is simply the business owner driving round in their own car or van, with gloves, hand gel and adherence to social distancing rules, but the appetite has definitely been there for goods and services, as long as the customers themselves feel safe and confident in how it is provided.

Some examples of particular note are:

Homebake

www.homebakeshop.co.uk

Traybakes and cake kits to make at home, all ingredients provided, only eggs and butter needed. Perfect for bored children and adults rediscovering the pleasures of home cooking. Themed kits have been a particular success – Easter cookies and VE Day cupcakes complete with Union Jack cases and red, white and blue sugar decorations. Flour has also been available, hand measured and in improvised packaging – but much appreciated whilst it has been in such short supply in the supermarkets.

Soak of Southwell

www.soak-southwell.co.uk

Beautiful luxury handmade soaps of every scent and variety, plus shampoo and bath treats. As we all have to wash our hands and take care of their subsequent dryness, this business has been far busier than they would have been normally. Soap has also been in short supply so many have been happy to turn to a luxury version.

Carnill and Company

www.carnillandcompany.com

Richard Carnill has in record time set up his own online shop providing a cross section of all his stock ready to be purchased and delivered. He has plans to expand this and tie it into his interior design service. He has also advertised his business indirectly by offering inspirational décor advice in local magazines to keep the shop profile in people's minds even if they are unable to visit in person.

Studio Lingerie

www.studiolingerieandresort.com

Telephone consultations for fitting and free delivery of all lingerie, swimwear, resort wear and accessories. The owner Julie Robb has set up a new online shop and delivery service as well as offering a one to one service for the most personal of purchases.

The response of service providers during COVID continues to reaffirm the vital role these businesses play within communities. Exhibit 10 illustrates some of the ways that leisure centres for example have helped their communities during the crisis.

Exhibit 10

How leisure centres have helped communities in crisis

Oxfordshire's leisure centres donate crucial PPE to pharmacy in need

Staff from leisure centres in Eynsham, Carterton, Witney, Didcot, Berinsfield, Henley, Wheatley, Wallingford and Thame collated their entire stock of shoe covers, face masks and gloves, along with cleaning chemicals (worth over 300 pounds) and donated them to Berinsfield Pharmacy on Fane Drive, Berins. The PPE equipment is normally used in a leisure facility environment when staff are cleaning communal areas, dealing with swimming pool and industrial chemicals or when staff have to carry out first aid. Nicola Shankland, Superintendent Pharmacist, Berinsfield Pharmacy commented 'We are so grateful to you for thinking of us at this difficult time when, as frontline staff, we find ourselves in a high risk environment where social distancing just isn't possible. Your donation means that we can be a little less anxious about spreading this disease between ourselves or worry about taking it home to our loved ones.'

Abingdon Leisure Centre donates surplus food and drink to local food bank

The White Horse Leisure and Tennis Centre has donated food and drink worth £600 to Abingdon Food Bank on Northcote Road. With the leisure

centre currently closed due to the Coronavirus pandemic, staff became aware that much of the food and drink it had in its stores, would reach its 'sell by' date before the facilities re-opened. Rather than letting the goods go to waste, staff donated an array of snacks, biscuits, crisps and soft drinks to the local food bank. The food and drink would normally have been served to customers visiting the leisure centre's Better Café. Abingdon Food Bank is part of The Trussell Trust, which runs the largest network of foodbanks in the UK, giving emergency food and support to people in crisis. The Trussell Trust said its network has seen its busiest ever period during the Coronavirus pandemic, with 81% more emergency food parcels being given out. According to the operations manager at the White Horse Leisure and Tennis Centre 'now is the time for local communities to pull together and support one another. Once we realised that we had food and drinks onsite that might perish before we re-opened, we wanted to act quickly to ensure that it would not be wasted and could be used to benefit those in need'.

All the leisure centres mentioned above are represented by [Community Leisure UK](#)

This is the largest UK-based charitable social enterprise delivering leisure, health and community services across the country. There are currently over 270 public sport and leisure centres, 113 libraries and 10 children's centres in partnership with 50 local councils, public agencies and sporting organisations operating under the brand. GLL has 850,000 members and welcomes 54 million customer visits per year. all of the leisure centres mentioned.

Finally, there will undoubtedly be pressure on towns to create cleaner, safer and healthier environments post COVID. As well as the growing environmental consciousness and conscience amongst consumers, the increase in outdoor exercise has enhanced awareness of the presence and value of green space and natural surroundings. If the predicted shift to home working continues then strategies that promote and capitalise on distinctive local heritage and landscapes will become paramount. There are also likely to be increased opportunities for health services to be

more effectively integrated into the community hub. More initiatives such as 65 High Street Nailsea could emerge offering opportunities for health professionals to interact digitally with users rather than in person, a practice accelerated during the pandemic.

Exhibit 11 highlights the work of the Health and Libraries initiative, a campaign to enhance the role of libraries as places to bring healthcare education and learning into the community.

Exhibit 11

The Health and Libraries initiative

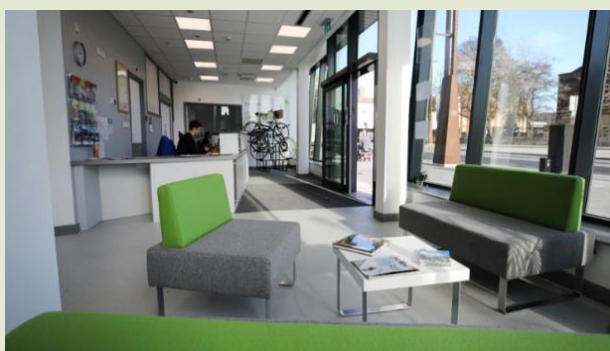
This is a project being led by Herefordshire based retired GP Dr Malcolm Rigler working in collaboration with Liverpool based Artists/Oral Historians The Sound Agents and Ian Morrell 65 High Street, Nailsea. The blog outlines a compelling argument for enhancing the role of libraries as places to facilitate healthcare education and learning in the community.

Part of the move towards creating a 'supportive' environment has been the rapid development of an infrastructure to support 'healthy' access to towns. Many places, such as Stockton (see exhibit 12), have already invested in initiatives to encourage cycling and walking in towns. The recent £2 billion Government package to support the development of cycle ways and pathways and relieve pressure on public transport has reinforced the significance of these activities. Opened in 2019, the Hub, operated by Sustrans, is the UK's first active travel and secure cycle parking centre, designed to support walking and cycling in the borough.

Exhibit 12

The Hub in Stockton high Street. The UK's first active travel and secure cycle parking centre.

The Hub, on Stockton High Street is a dedicated one-stop resource centre providing volunteering opportunities, training, information and outreach services to give people the skills and equipment that they need to walk and cycle more often. The Hub is situated in a long-term vacant, former retail unit, acquired by the Council and refurbished using Heritage Lottery Funding and Council funds at a cost of around £500,000 to bring three floors back into use. This initiative has benefited from a strong partnership with the national charity sustrans, committed to helping to ensure that environments are both cyclable and walkable.



Other councils have ambitious post-pandemic plans in place to curb the pollution and congestion caused by motor vehicles in towns. In addition to culling parking spaces Newcastle City Council plan to introduce pop-up cycleways, widen sidewalks, and introduce more 20mph streets. Longer-term, Newcastle is also considering a workplace parking levy and road charging, including for ultra-low

emission vehicles. According to Councillor Arlene Ainsley, cabinet member for transport and air quality at Newcastle City Council, 'it is vital that we don't revert back to the idea that it is acceptable for the car to be the default option as in the longer term this will have serious implications for our environment and our health.'^{vii}

GOVERNMENT AND PLANNING

a. Leadership and planning

One of the key findings from GR2 was the importance of ‘outstanding, talented and committed leadership’. Town leaders should be able to bring all stakeholders together, including the community and develop a strong visionary place plan to reinforce the distinctive heritage and identity of a place. (p.6). Roeselare in Belgium, led by Mayor Kris Declercq and Stockton-on-tees, led by former council Chief Executive, Neil Schneider were featured as exemplars of good practice in terms of both leadership and planning. Since publication, there have been many more examples of Councils who have developed coherent place plans, which articulate a clear vision for a location and a unique

selling proposition (USP) often linked to heritage. Exhibit 13 features the strategic plan developed for Rotherham. The masterplan presented in three parts centres on a realistic vision for the place. The vision incorporates three key themes: engineering excellence, reflecting the industrial heritage, green living, acknowledging the scenic countryside and attractive landscapes and views .and pushing boundaries, capturing a desire to embrace change and do things differently. The plan has been developed and refined following an extensive programme of stakeholder consultation with community members, town centre landlords, developers and house builders.

Exhibit 13

Link to the three stages of Rotherham’s masterplan

https://archive.rotherham.gov.uk/downloads/download/345/town_centre_masterplan



One of the groups that appears to have been particularly active in leading the development of community hubs is the National Association of Local Councils (NALC). Exhibit 14 highlights progress made by some of its members as well as views on barriers to progress post COVID-19

Exhibit 14

The role of local councils in leading change

Progress post Grimsey and challenges ahead

Prior to the pandemic, despite limited government support, many councils had made significant progress developing towns as sustainable community hubs. Initiatives have focused on reinforcing the unique heritage of a place and improving the public realm. A concern for community health and well being lies at heart of many initiatives. In 2017, for example, Cirencester Town Council delivered radical change with a scheme to reduce unnecessary traffic in the town centre whilst retaining accessibility. The plan involved creating a new high quality public realm to accommodate market growth and community events. The council received a national civic voice award for tackling a problem head on 'reclaiming the historic centre of the town for people and not cars'. The Market Place scheme was seen to demonstrate the power of urban design in helping to enliven our historic high streets and sets an example for conservation areas across the country'. Prior to COVID-19, the town centre was much enhanced and well used.

Many councils had achieved success through collaboration and strategic partnerships. The Grimsey review prompted many to develop close partnerships with the tourism sector to help reduce the reliance on retail. This is evident

Neighbourhood Plan published in autumn 2017 by Highworth Town Council. The council recognised that the town population alone would not sustain the high street shops and survival meant attracting regular footfall from the surrounding area and further afield. Although Highworth does not have a beach or a river flowing through it, it boasts a range of pre-Victorian high street buildings in the centre. To capitalise on its heritage, the council engaged with the local community partnership, Highworth Community Partnership Group (HCPG), to develop a tourist strategy, which was adopted in 2018. As well as contributing a page to the VisitWiltshire site, producing its own Visit Highworth website and a town trail, the group has set up community benefit society, called Visit Highworth Limited (VHL). This not for profit cooperative have created a Visitor Information Centre, local craft centre and museum in the former Lloyds bank. The project has been entirely funded by the sale of shares to local residents and businesses.

Councils recognise that businesses face challenges brought about by COVID-19. In many places, characterised by narrow streets and a density of independents, social distancing measures are a particular concern. As is the switch in emphasis in towns to tourism and leisure and the development of an experiential offer, based on high contact events and community participation. However, others see opportunities linked to a more cosmopolitan/ alfresco dining offer and acceleration of digital capabilities as well as those linked to the introduction of new cycling and walking measures or routes; helping to improve the environment - reducing carbon and encouraging healthy living practices.

Others see the potential transition to home working as an opportunity to accelerate change. In a recent poll of 1500 UK business owners and staff,

82% said they are considering changing future working practices to allow more staff to work from home once the lockdown ends. However, more information is required at a local level to respond effectively. According to the Town Council clerk for Ivybridge 'it is vital that we understand the numbers of people in Ivybridge who have continued to work from home during this crisis, and how many will continue to do so, at least on a part time basis, as this would transform the day to day functioning of the town centre and the type of services and social networking that might be needed'

There are also opportunities to tap in to the enthusiasm to support local shops. Weymouth

was one of the latest of many towns across the UK to take up the Totally Locally campaign but had already started to see major benefits from involvement prior to the pandemic.

Launched on 1st October 2019 the scheme saw more than sixty local independent shops and businesses join together to promote the best of local produce, goods and services. The Covid-19 pandemic has seen more local residents using available local shops and is seen as a positive to continue to be developed to help support the Town and its businesses.

b. Collaboration

Clear strategic place plans have emerged because of strong collaboration between a diverse range of stakeholders. At a local level, many of the initiatives cited above would not have been possible without

a co-ordinated approach to the management of a diverse range of stakeholders. Exhibit 15 illustrates the operational support required to achieve success in Stockton-on-Tees.

Exhibit 15 Local collaboration in Stockton-on-Tees

The Council has created dedicated posts to support town centre functions including market management, street licensing, civic enforcement and business support. Based in a repurposed former retail unit branded, Rediscover Stockton; visitor information functions along with the officers described above provide a visible accessible presence for members

the public should they require support or information and dedicated points of contact for existing and new business across the boroughs town centres. Several national awards evidence the success of commitment to these functions including National Market Manager of the Year and recognition for the contribution to a 'Rising Star' award in the Great British High Street competition. The picture below shows the multi-disciplinary and flexible town centre operations team.



On a national level the work of the Government High Streets Task force illustrates the benefits of collaboration around the high street agenda (see exhibit 16).

Exhibit 16

The High Streets Task Force, driving change through collaboration

In 2019, MHCLG commissioned the High Streets Task Force (HSTF) through a tendering process. The Institute of Place Management at Manchester Metropolitan University identified that a consortium was required to address the specific elements of the tender. The Task Force has four key roles: supporting local authorities in their approach to town centres, developing wider place leadership, co-ordinating a national approach on high streets and providing data and intelligence nationally and locally. IPM, RTPi, Landscape Institute and the Design Council, have identified a varied range of experts to provide support to local authorities and bring their knowledge into the Task Force.

To provide project management support, capacity and data insight, IPM partnered with PwC. Data providers Springboard and Maybe* provide intelligence on high streets, analysed by specialists at Cardiff University and managed by technology specialists MyKnowledgeMap.

To ensure the HSTF could reach out to local places, communities and young people, the consortium includes The BID Foundation, ATCM, Civic Voice and the Teenage Market. Just over 20 leading trade associations in place management, retail, property, leisure, hospitality, and other town centre uses are part of the HSTF Sector Leaders Group. This group is currently working closely with government to understand what is happening in town centres during COVID-19. The HSTF Professional, Research and Data Group brings data providers from the

consortium along with ONS, OS, Centre for Towns, and Google together with academic researchers to increase understanding of performance and change in town centres.

The Task Force was piloting a range of products and services when COVID-19 struck. The work since then has focused on supporting place leaders in managing responses to the crisis, pre-recovery and into recovery. This has been done through online provision and webinars. To accelerate the transformation needed post COVID, the HSTF is currently developing a route map with supporting materials to enable this transition in high streets across the country.

The success of the HSTF relies on strong collaboration between a diverse range of partners with varied skills and expertise and a commitment to leading change in town centres.

There are many other examples, which illustrate how collaboration is driving change in town centres.

Exhibit 17

Weston-super-Mare; developing a community 'hub' through effective collaboration

North Somerset Council have been working to develop Weston-super-Mare as a community 'hub' by mobilising the support, enthusiasm and expertise of a range of stakeholders. The Council acquired the town centre shopping centre and car park with a view to repurposing it as a community 'hub', to bring back together disparate local communities, groups and institutions.

It is fast becoming the beating heart of the community by integrating the interests and work of the Council, Town Council, BID, local businesses, and Weston College. It provides space for events and incubation alongside a core retail offer. It plays a vital role in the Weston-super-Mare place and brand identity strategy. It offers spaces for education, access to health and public services, and a linked events space between the main Italian Gardens public realm and the seafront.

The Weston Collective is an ongoing programme involving 65 local traders, makers and artisans, which so far has 8 different events and a permanent 'shelfie' space. There is a growing Tech Hub developed in conjunction with Weston College, which is delivering skills and training for students to support entrepreneurship. There is another space, allocated to SEN uses, which sells art and creations as well as providing autism training for businesses. This transition has been accelerated by the appointment of new member and officer group at the Council, which has engaged with the local people more than ever, and created a collaborative atmosphere anchored around the shopping centre, high street, seafront and public square. Picture is Eat Weston Food Festival.



Exhibit 18

Improving access through collaboration; the Urban Mobility Partnership (UMP)

According to the website, the Urban Mobility Partnership (UMP) is 'a coalition committed to providing long-term leadership and near-term solutions to improve future urban mobility'. It is a collaboration set up by transport operators and other partners with an interest in mobility policy to look for new policies at a national and local level for the next 5-10 years rather than the next 20 years.

The UMP partners are Enterprise, Bosch, Stagecoach, Next Bike, Brompton Bike, Mobilleo and Foot Anstey. As a forum, the partnership works with national and local government to develop solutions that address the fundamental transport facing UK towns and cities – and to support the national policy agenda from a private sector perspective. UMP has a number of areas of interest – but in particular is looking at how the long-term success of UK town and city centres both economically, socially and environmentally can be secured with more sustainable transport solutions. This includes for example examining how planning policy can better consider mobility as a concept and how new development can support more sustainable transport.

The partnership has engaged with MHCLG around the Future High Streets Fund, and in particular how this scheme aligns with clean air zone policies across the UK.

This collaboration has result in some major initiatives, which are contributing to the objective of creating cleaner, healthier more sustainable environments. These include a mobility credits scheme, an electric bus investment scheme. More information is available on the website.

<https://www.ump.org.uk/>



Exhibit 19

Bradford City Park; transforming public realm through collaboration



Bradford City Park is located at the heart of Bradford city centre. It was the signature project of the Bradford City Centre Masterplan and is now a multi-award winning public space and catalyst for the regeneration of the City. The completed project successfully delivered transformative public realm opening up the city centre as a place for people to meet, hold events, entice visitors and attract investment, enabled in part by an increase in value. The City Park was a joint project between the City of Bradford Metropolitan District Council, Bradford Centre Regeneration - the city's Urban Regeneration Company - and Yorkshire Forward. The project partners worked with Arcadis, as Development & Project Management; Cost and Strategic Regeneration Consultants; Gillespies – Landscape Architects; Arup – Engineers; and Sturgeon North – Architects.

Background

In 2003 the city centre masterplan had a vision of opening up the city centre and creating a city park that would glue the city centre together. Four years of project consultation and development followed to turn this vision into a viable plan. The resulting scheme was well received by both local communities and the business sector who felt it would boost the economy and enhance community relations. In 2009, during the economic downturn, the Political Executive of the Council approved Council funding which, together with funds from Yorkshire Forward and the Regional Transport Board, enabled the iconic City Park scheme to be delivered. This crucial public sector investment sent a strong signal to the private sector and investors coming into Bradford, demonstrating the council's commitment to the City Park and wider regeneration. Even in the challenging economic climate in which this project was developed, it set out to deliver

ambitious transformational goals. The investment in high quality materials has ensured that it has stood the test of time. This was key to the long term impact it has had on Bradford and the benefits that it continues to deliver to this day through increased land values, new jobs and prosperity to the city and wider region. A focus on community engagement was important to securing the investment needed to enable delivery and maintain wider stakeholder support. Public support was increased through a focused campaign designed to articulate the wider benefits of the project. This increased measured support for the park from 50% to 70%. Wider stakeholder engagement was also critical and it was necessary to ensure that, as the project developed, it remained aligned to the varied aspirations of the numerous key stakeholders and the funders. This included demonstrating the economic benefit of the investment to Yorkshire Forward. In part this was achieved through a robust appraisal and transparent management of the costs, deliverability and benefits to be achieved by the project. The image above illustrates City Park under construction in 2011. The image below is the park today.



Exhibit 20

Using the expertise of designers and architects to develop the community ‘hub’ solution

The Future Place programme is an initiative designed to unlock placemaking potential at local level by supporting innovative design solutions, delivery models and collaboration through interdisciplinary expert advice, capacity building, and knowledge sharing.

The 2019 programme was delivered in partnership between the Royal Institute of British Architects (RIBA), Local Government Association (LGA) with Local Partnerships, Homes England, the Royal Town Planning Institute (RTPI) and Chartered Institute of Housing (CIH) to focus and coordinate the combined placemaking resource and capacity on places which are at the right point in the process to benefit from an injection of future thinking. Historic England has since joined the partnership.

According to Ben Derbyshire Past President RIBA and Future Place Champion, ‘Future Place is a partnership for sustainable and inclusive placemaking. We have established effective collaboration at the level of the national institutions who have contributed to the first year of the project. This has been replicated in the co-creation of visions for beneficial change in five local authorities’.

The five 2019 Future Places were all determined to deliver meaningful change which will enhance people’s lives, improve community wellbeing and create sustainable environments. While each place is very different, they all work in collaboration with public, private or voluntary sector partners to develop and advance innovative place-making strategies’. In Bradford, the emphasis was on developing strategies to involve local youth in design and development. In Gateshead, the focus was on developing a character-led place-making strategy to help tackle inequality, encourage better health and

wellbeing, and retain and attract residents, visitors and businesses. In Great Yarmouth, the challenge was how to better align existing tourism, culture, and heritage offers with the future of the town as the national capital for offshore energy.

Details about all of the projects and collaborators can be located here:

<https://www.architecture.com/-/media/GatherContent/Test-resources-page/Additional-Documents/2019-Future-Place-report-Unlocking-the-Potential-of-Placespdf.pdf>



The impact of COVID-19 on government and planning

The possibility of Government funding, made available before COVID has undoubtedly served to re energise councils' interest in the importance of strategic planning. Applications to both the £3.6 billion Towns Fund and the £1 billion Future High Streets Fund require councils to submit evidence based plans for high street regeneration.

Towns are required to define context and evidence of need for suggested interventions, as well as a vision, which complements existing local economic strategies. The government is supporting further local leadership development through the High Streets Task Force (exhibit 16 above).

As in other areas, the crisis has simply served to reinforce the need for strong leadership, collaboration and coherent strategic place planning.

In the short term plans will need to be revised to account for operational changes associated with social distancing. Indeed additional funding of £6.1 million to be channeled through the BID network, has already been allocated by the Government to help high streets get through the pandemic. In the longer term, strong leadership and vision will remain critical to survival.

Leaders will need to continue to collaborate closely with stakeholders and develop strategy, which reinforces the distinctive identity of a place.

SMARTER USE OF TECHNOLOGY

Previous reviews highlighted the need for Town centres to embrace the digital revolution. The case studies pointed to the need for free town centre WIFI and greater use of mobile technologies and virtual shopping to enhance the consumer town centre 'experience'. Since the last review, many town centres have taken steps to progress this digital transformation. Examples below illustrates some of the developments.

Exhibit 21

The power and impact of social media in towns: the work of Maybe*

www.maybetech.com

Grimsey Review Two, featured the success of the #WDYT campaign delivered by Maybe* in getting town centre retailers to collaborate and use social media to increase local footfall and sales. At the time, Maybe* was working across 16 towns, measuring both the volume and impact of social media activity. Maybe* now operates across 1300 UK towns and cities and is working with the High Street Task Force to provide services that help High Streets understand the impact of social media sentiment and engagement. Every high street now has free access to the company's services.

The data that Maybe* collects comes from Google, Facebook, Twitter and Instagram on a daily basis tracks the digital output of over 700K businesses in 1300 places. This data is tracked by location and sector and where possible is matched to business results. Monitoring the data has enabled Maybe* to develop case studies to illustrate the power and impact of social media sentiment on business performance. See for example the impact of engagement by Doncaster Council.

<https://www.maybetech.com/blog/case-study/how-doncaster-council-is-smashing-social-to-earn-an-army-of-engaged-followers/>

The positive link between social media engagement and footfall and sales is well understood by the majority of large corporations. However, pre COVID-19, Polly Barnfield OBE and CEO of Maybe* was concerned that 'local businesses were not adopting digital channels fast enough' Maybe* had evidence to indicate that in some cases up to 78% of high street organisations were not active on social media on a daily basis'.

According to Polly 'not having a digital infrastructure will rapidly become like not having roads or public transport. The ability to connect with the people and businesses within a place via digital channels is vital'.

Exhibit 22

The UK's first 5G shopping centre Surrey Heath Borough Council

In 2016, Surrey Heath Borough Council bought a significant portion of Camberley town centre to deliver regeneration and take the difficult decisions that the private sector could not. Alongside delivering housing and diversifying away from retail, including shrinking the overall retail offer, the Council has been interested in how technology could help tie a new era of retail into a modern town centre.

Led by the Council, a partnership was formed which, over the coming months, will deliver the UK's first 5G shopping centre. The collaborators alongside the Council include the University of Surrey, Huawei, Alibaba, Deloitte, Story Futures at Royal Holloway University of London, Montagu Evans and the Department for International Trade.

It will become a test bed for retail-based technologists to explore how ultra-fast connectivity in a real life environment could provide a blueprint to how modern towns might function.

Early experiments being considered will look at aggregating local tastes to provide relevant stock, testing emotional reactions to goods and brand experiences and could expand to link the internet of things and, potentially, driverless cars. The picture below illustrates part of the proposed redevelopment of the town centre.

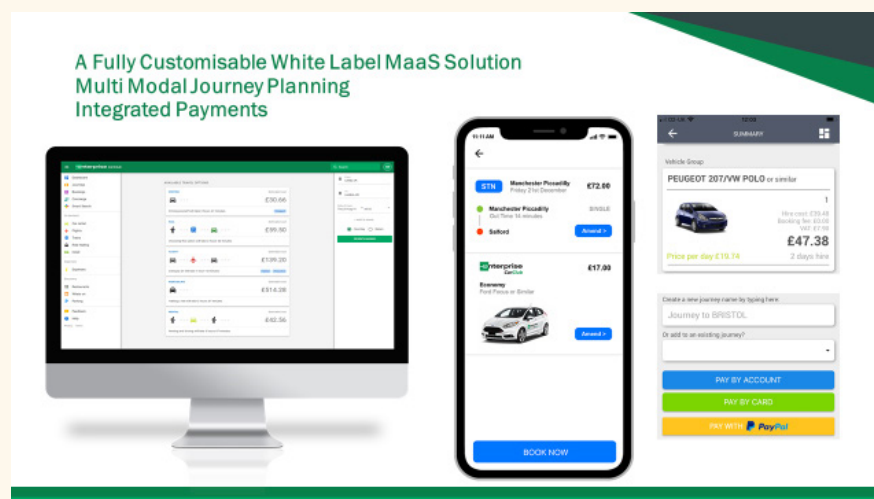
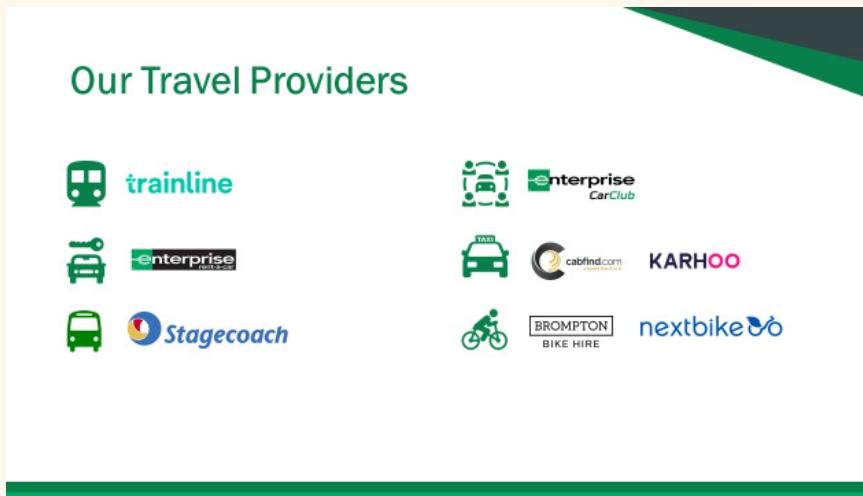


Exhibit 23

Connecting through mobile applications

This is another initiative, which has emerged from collaborators in the Urban Mobility Partnership. The platform will consolidate and integrate multiple travel operators of shared and public transportation, allowing users to search, book and pay for travel all within the app. It is described as a 'fully

customisable white label MaaS solution, which can be accessed via apps and desktop applications'. In essence, it works like Netflix but for transportation. The illustrations below outline the features of the platform and the partners involved.



The impact of COVID-19 on the technological transformation of towns

It is clear that the COVID-19 has dramatically accelerated the development and impact of the digital revolution on both consumers and town centres. With the closure of physical facilities on the high street, many businesses have moved to virtual delivery, learning new digital skills and expertise to interact with consumers. Customers too have learned how to cut hair, make clothes and cook restaurant quality meals with support from self-help videos and digital encounters. This is a radically new digital environment, which is going to develop even more rapidly post COVID-19. Self-service technologies, already growing at a rapid rate pre COVID, are likely to be more pervasive and sophisticated.

Virtual reality apps, tapping into the emotional and experiential have been used widely during lockdown and are likely to expand rapidly. Supernatural is one example, an immersive, virtual reality fitness

experience that combines the best music, coaches, destinations and movements into an incredible home workout. A new workout is released every day.

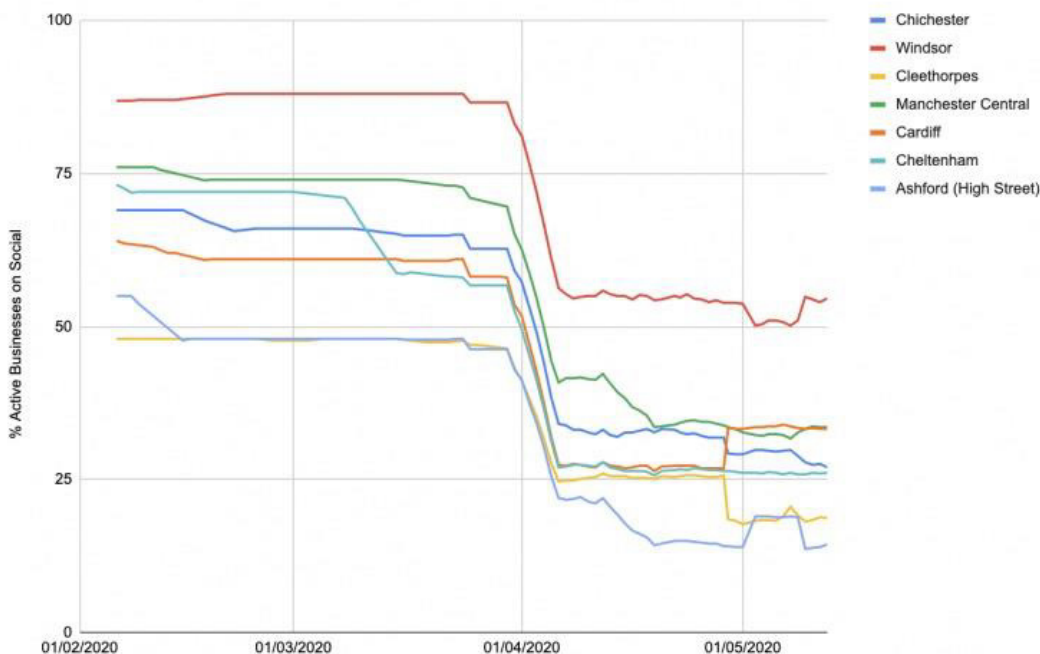
<https://www.getsupernatural.com/>

Other technologies are giving consumers an increasing number of self-help options. Medic Spot, for example helps doctors carry out routine health checks at a distance in any location.

https://www.youtube.com/watch?v=NrFAaSI_nE&feature=youtu.be

Towns will need to be rapidly reconfigured to respond to this new digital environment. This will not be an easy task if the figures about the uptake of social media during COVID are anything to go by. According to Maybe*, the number of high street businesses engaging with social media during the crisis fell dramatically (see figure 3).

% Active on Social Media (inner city)



This is in stark contrast to the trend in consumer behaviour, which shows Consumers' use of social media almost doubling during the same period.

According to Polly Barnfield this 'underlines the need for each High Street to ensure they put in place the digital infrastructure, skills training and measurements to ensure they can adapt fast to consumers' increasingly high digital expectations.

If the digital experience does not grab their attention or measure up to that offered by others, then bringing them back to the High Street in question will be much harder. We know that the High Street offer will change - but what will not alter is consumers "digital first" approach. It is time to adapt'.

“The most successful high streets and town centres will need to change to reflect the communities they serve by transforming themselves into community hubs, playing to their strengths of offering human interaction and unique sense of place and community”

Taken from The Government response to the Eleventh Report of Session 2017 – 19 of the Housing, Communities and Local Government Select Committee inquiry into high streets and town centres in 2030 which was presented to Parliament in May 2019.

References:

- i (House of Commons, HCLG report High streets and town centres in 2030). -
- ii <https://www.gov.uk/government/publications/future-high-streets-fund-call-for-proposals>
- iii <https://www.gov.uk/government/publications/towns-fund-prospectus>
- iv <https://www.placemanagement.org/media/19883/markets-matter-final.pdf>
- v Data from OnePoll research, conducted on behalf of Waitrose and John Lewis, April 2020, completed by 2000 nationally representative UK adults. Supported with sales data from Waitrose and John Lewis, and online search statistics. Reported in <https://www.johnlewispartnership.co.uk/content/dam/cws/pdfs/Juniper/Britain-Through-the-Lockdown-John-Lewis-and-Waitrose-Report.pdf>
- vi https://www.acs.org.uk/sites/default/files/lobbying/acs_submission_-_efra_committee_covid_inquiry.pdf
- vii <https://www.forbes.com/sites/carltonreid/2020/05/15/parking-cull-and-pocket-parks-for-englands-finest-street-as-newcastle-plans-post-pandemic-future/>
- viii Markets matter report
- ix (González & Waley, 2013;
- x
- xi A survey by analyst Retail Economics of 2,000 consumers, quoted in The Guardian, found that two-thirds of shoppers said they had switched to purchasing products online that they have always previously purchased in-store (Inman, 2020).
- xii
- xiii John Lewis and Waitrose One poll survey of 2000 adults
- xiv ACS report to select committee
- xv <https://www.forbes.com/sites/carltonreid/2020/05/15/parking-cull-and-pocket-parks-for-englands-finest-street-as-newcastle-plans-post-pandemic-future/>
- xvi Material supplied by Polly Barnfield OBE and CEO Maybe*
- xvii Material provided by Kevin and Sam Marshall South Heath

APPENDICES

GRIMSEY REVIEW - COVID 19 UPDATE	RETAIL & HOSPITALITY BUSINESSES					APPENDIX 1
INSOLVENCY STATISTICS	2019	2018	2017	2016	2015	
Retailers	1,592	1,560	1,407	1,304	1,359	
Hospitality Businesses	2,459	2,335	1,886	1,817	1,802	
TOTAL FAILURES	4,051	3,895	3,293	3,121	3,161	
ALL BUSINESS INSOLVENCIES	21,658	22,206	21,662	21,267	19,512	
% OF BUSINESS INSOLVENCIES	19%	18%	15%	15%	16%	
<i>Source: The Insolvency Service</i>						
ZOMBIE COMPANIES	<i>(with liabilities at least £10k greater than their assets)</i>					
	NUMBER	NEGATIVE				
	#	VALUE				
		£m				
Retailers	15,908	2,206				
Hospitality Businesses	13,200	2,033				
NUMBER OF ZOMBIES	29,108	4,239				
TOTAL NUMBER OF RETAIL & HOSPITALITY BUSINESSES	136,228					
% OF ALL RETAIL & HOSPITALITY BUSINESSES	21%					
<i>Source: Company Watch</i>						

GRIMSEY REVIEW - COVID 19 UPDATE	MAJOR RETAIL FAILURES 2007 - 2020			APPENDIX 2
YEAR	NUMBER OF FAILURES	STORES AFFECTED	STAFF AFFECTED	
2020	<i>(to end April 2020)</i>	21	1,128	34,274
2019		43	2,051	46,506
2018		43	2,594	46,014
2017		44	1,383	12,225
2016		30	1,504	26,110
2015		25	728	6,845
2014		43	1,314	12,335
2013		49	2,500	25,140
2012		54	3,951	48,142
2011		31	2,469	24,025
2010		26	944	10,930
2009		37	6,536	26,688
2008		54	5,793	74,539
2007		25	2,600	14,083
TOTALS		461	32,316	327,076
ANNUAL AVERAGE 2008-2019		39	2,644	28,737

Source: Centre for Retail Research

SECTOR		NUMBER OF COMPANIES	AVERAGE TOTAL ASSETS	AVERAGE TOTAL BORROWINGS	AVERAGE NET WORTH	AVERAGE HEALTH SCORE	COMPANIES IN COMPANY WATCH WARNING AREA		
		#	£'000s	£'000s	£'000s	(Max 100)	#	%	
Retail	Companies With Assets > £100k	37,368				45	12,826	34%	
	Companies With Assets £25k-£99k	29,153				31	15,532	53%	
	Companies With Assets < £25k	20,173				27	13,453	67%	
	Retail Totals	86,694	2,236	465	884	36	41,811	48%	
Hospitality	Restaurants	37,287				27	# 22,293	60%	
	Pubs & Clubs	12,247				30	7,059	58%	
	Hospitality Totals	49,534	827	289	253	28	29,352	59%	
	Retail & Hospitality Totals	136,228	1,723	401	654	33	71,163	52%	
		INDUSTRY SCALE				Source: Company Watch			
		NUMBER OF COMPANIES	TOTAL ASSETS EMPLOYED	TOTAL BORROWINGS	TOTAL NET WORTH				
		#	£'000s	£000's	£000's				
Retail		86,694	193,805	40,332	76,611				
Hospitality		49,534	40,975	14,314	12,531				
Overall		136,228	234,780	54,646	89,142				

AUTHOR BIOGRAPHIES



Bill Grimsey

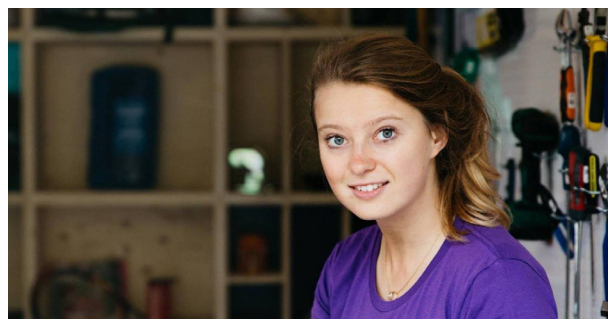
Bill is a retired retailer with 45 years active experience. During his career he held senior positions at Budgens and Tesco before becoming the managing director of Park'n'Shop, Hong Kong's leading supermarket chain. He was also the CEO of Wickes, the Big Food Group (Iceland and Booker) and Focus DIY. He holds a number of non executive posts and led the publications of The Grimsey Review one (2013) and two (2018) into the high street. He was also the author of Sold Out: Who Killed the High Street in 2012. In 2015 he was awarded an honorary doctorate in Business Administration by the University of South West England for his contribution to retailing.



Katie Perrior

Katie was most recently the Director of Communications to the Prime Minister at No.10 Downing Street, providing communications counsel

to the PM and running the No.10 press office and special advisor network. Katie had previously co-founded iNHouse Communications in 2006 with Jo Tanner, having held a number of senior roles including Head of Press for Channel 4 News and Deputy Head of Press for ITV News. She and Jo led the public relations campaign for Boris Johnson's successful London Mayoral campaign in 2008. She writes regularly for The Times newspaper, hosts a show on Talk Radio and is a political broadcast commentator for Sky, the BBC and ITV. Prior to this Katie was a local councillor and Cabinet Member for Community Affairs and Children's Services in the London Borough of Bexley, a Non-Exec Director of Ebbsfleet Garden City and an NHS Trust in South London. She is currently a school governor and is passionate about regeneration.



Rebecca Trevalyan

Rebecca Trevalyan is co-founder of Library of Things (<https://libraryofthings.co.uk>), a social enterprise that saves people money and reduces waste by affordably renting out items like drills, strimmers and sewing machines from high street kiosks. She also advocates for, writes and speaks about community-powered high streets. Previously, she was Head of Partnerships for community enterprise space Impact Hub Brixton, where she launched local civic leadership programmes and projects that went on to be replicated internationally.



Nick Hood

Nick is a business risk analyst with Opus Restructuring, the business rescue firm. He also maintains an informal relationship with Company Watch, the corporate financial health monitoring specialists. He has specialised in researching and commenting for a wide range of media channels on the retail sector since the global financial crisis broke in 2008. He was a Chartered Accountant for almost 50 years and a licensed insolvency practitioner for over 20 years. He has been CEO of two listed companies and also held senior positions in the engineering, publishing, advertising and construction sectors in the UK, as well working for an investment banking boutique. His international career involved posts in Canada, Italy, the Middle East and South East Asia.

Bedfordshire. She was a member of the Grimsey Review team on the future of the high street, reporting in 2013 and 2018 and was on the judging panel of the MHCLG Great British High Streets Awards 2019. She was Chair of the Constellation Partnership, steering the regeneration benefits of the HS2 investment into Crewe, 2016 to 2018. A regular columnist for the Estates Gazette, she is currently co-authoring a book 'Broken Homes' on the housing crisis with Peter Bill.



Neil Schneider

After qualifying as a fellow of the Chartered Institute of Housing in 1995, Neil has held a variety of roles across housing, operational services and regeneration in a local government career spanning 37-years .

From 2008- 2019 he was chief executive of Stockton on Tees Borough Council, and was extensively involved in establishing the Tees Valley Combined Authority and its devolution deal with central government. During his tenure he led work that saw both Stockton then Yarm win the UK Rising Star high street of the year awards . In 2019 he received the Van Coulter Lifetime Achievement Award from The Association of Public Service Excellence (APSE) and a special lifetime achievement award from Stockton Borough Council . He now coaches, mentors and develops and delivers leadership programmes.



Jackie Sadek

Jackie has 30 years' experience in property, specializing in public-private sector partnerships. From 2014 to 2016 Jackie was Specialist Adviser to Government on urban regeneration.

Jackie is Founder and Chief Operating Officer of UK Regeneration (UKR), developing new models of housing delivery, and currently bringing forward 1,500 homes in a garden settlement in



Matt Baker

Matt Baker is a consultant specialising in community led regeneration. He designed and led the first Local Government Association leadership programme on high streets last year and has advised many local authorities on placemaking strategies.

Previously an advisor to a former Cabinet Minister and former Mayor of Bristol, he has also worked at the Centre for Public Policy and Management at Manchester University. Over the last year he has worked on several major high street consultations and is an Associate at Social, an award winning Manchester consultancy telling stories, engaging people and improving lives.



Chris Shellard

Chris worked in local government for over 30-years in senior roles in regeneration, planning and social and economic policy. He was director for the Regional Sector for Neighbourhood Renewal and consultant to several local authorities. In his role as development director for Lee Valley Estates, he was responsible for delivery of Hale Village, a large mixed use development in North London.



Kim Cassidy

Professor of Services (Retail) Marketing at Edge Hill University, Kim is also academic director of the National Retail Research Knowledge Exchange Centre (NRRKEC) at Nottingham Business School. Kim is passionate about maximising the impact of academic research on retailing and has worked with the Economic and Social Research Council. Her research is on customer engagement in retail.

ACKNOWLEDGEMENTS

Gary Kerr, Trustee and Chair Paisley Community Trust (www.paisleytrust.org)

Polly Barnfield, OBE (www.maybetech.com)

Gordon Seabright, Creative Land Trust (www.creativelandtrust.org)

Emmie Kell (www.cornwallmuseumspartnership.org.uk)

Rob Arthur and Hugh Stevenson, The Big Picture (Cinema Advisers) Ltd (www.the-bigpicture.com)

Sarah Payne, Tourism and Business Support Officer, Newark and Sherwood District Council

Members of the Shop Southwell traders group (www.southwellcouncil.com/shop)

David Jobling, Arcadis Design and Consultancy (www.arcadis.com/en/global)

Livia Filotico Communications Manager Community Leisure UK (www.communityleisureuk.org)

Kevin White, Partner Montagu Evans LLP (www.montagu-evans.co.uk)

Alex Hearn, Assistant Director of Placemaking and Growth, North Somerset Council.

Jon Walton Manager of Sovereign shopping centre Weston-super-mare

Simon W Quin, Co-Chair of the Institute of Place Management & Executive Director of the High Streets Task force (www.highstreetstaskforce.org.uk)

Cathy Parker, Co-Chair of the Institute of Place Management <https://www.placemanagement.org/>

Steve Dowling, Public Affairs Manager Association of Convenience Stores, Association of Convenience Stores Limited (www.acs.org.uk)

Ian Morell, 65 High Street Nailsea (www.nailseatown.com/65-high-street)

Malcolm Rigler, FRSPH, Member CILIP Health Group

Vanessa Dehulli, Team leader Economic development department Roeselare and town centre consultant info@dvconsult.be

Kris Declercq, Mayor of Roeselare

The Urban Mobility Partnership (www.ump.org.uk)

Jonathan Werran, Chief Executive Localis, the independent, leading not-for-profit think tank (www.localis.org.uk)

Richard Beddard, Market Manager Stockton-on-Tees

Future Place (www.architecture.com/Research/future-place)

Frederik Weissenborn and RIBA (www.architecture.com/@riba.org)

Lesley Hughes, Town Clerk Ivybridge Town Council

Vivienne Whitaker, Project Officer Frome Town Council, Somerset

Jane Kevan Hexham Town Council

Ed Warr Weymouth Town Centre Manager

Andrew Tubb, Chief Executive Officer Cirencester Town Council

Keith Smith Chair, General Purposes and Finance Swindon Town Council

Laura Holloway at Tendo consulting (www.tendoconsulting.co.uk/who-we-are)

James Lancaster, Director of Government Affairs and Policy UK and Ireland, Enterprise

Sam Marshall, Surrey Heath Borough Council

Justin Griggs, National Association of Local Councils