



**BIS**

Department for Business  
Innovation & Skills

## HEALTHY HIGH STREET?

# A healthcheck for high streets and town centres

November 2010

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## INTRODUCTION

High streets play a crucial role at the heart of our local communities. They are more than just a shopping destination for residents. Everyone with an interest in their local high street can play a role in maintaining and promoting a healthy trading environment and enabling it to thrive.

The UK has more than 5,400 places named ‘High Street’ and many more are high streets in everything but name. Each has its own traders; each has different customers, a different local authority, different buildings, different attractions and different problems. Their immediate environments are different, their local economic circumstances are different and they have different social issues.

*Healthy High Street?* is for anyone concerned about their local high street, particularly high street traders but – no matter whether you run a shop, work for the council, belong to the Chamber of Commerce, operate a local advice centre or none of these – if you care about the future of your high street, this is a healthcheck that’s definitely worth a read.

Healthchecks are not for the obviously ill but for the apparently healthy. For high streets and town centres it’s much the same: the people whose health is most affected are the ones with the greatest incentive to take the first step; they are the people who need to organise their own healthcheck or find someone competent to take on the responsibility of carrying it out.

If you know an area well, you can sometimes be blinded by familiarity and fail to pick up on clues until decline has already set in. The aim of this guide is to help open your eyes to give you an opportunity to take action as early as possible, meaning you have the best – and most likely the cheapest – chance of success.

## HOW TO USE THIS GUIDE

There is a *5-minute checklist* at the start, followed by more detailed pointers on where to look and how to identify the risks.

If your healthcheck does suggest it's time for action, the *Next Steps* section offers ideas to help you start out on the path back to a healthy high street.

In using this guide, please remember that one indicator alone may not predict a decline but several taken together may well do so. It is important to take wider trends into account, such as the rapid growth of e-retailing and the move towards healthier and environmentally friendly products; also, a downward trend in something does not necessarily herald calamity to come – after all, in a recession all high streets will be impacted but it's their relative performance that is the key. So, benchmarking performance against similar high streets or town centres can be an extremely useful exercise.

## Authors

This guide has been compiled by the Department for Business, Innovation and Skills with the help of public and private sector organisations, businesses and individuals with wide experience of identifying and successfully tackling high street problems.

## 5-MINUTE CHECKLIST

- ☐ Do you know who is responsible for leading your town centre/ high street strategy? If not, maybe there isn't a strategy or maybe it lacks good leadership.
- ☐ Are public facilities and signage attractive and well looked after? Do they add to or detract from the high street?
- ☐ Does the high street make you proud? If it were someone else's high street, would you want to go back there?
- ☐ Is there a wide range of shops and facilities – catering, fashion, essentials, luxuries, multiples, independents? Has it changed much recently? Is that a good or a bad thing?
- ☐ Has it become more difficult to travel to your high street? For example, have there been changes to public transport?
- ☐ Regardless of whether it's actually a safe place, is the area perceived as safe? Has local crime gone up?
- ☐ Does everything shut at 5:30, just before commuters come home and people go out for the evening?
- ☐ Have there been any significant changes in the surrounding area – competing shopping centres, attractions opening or closing, major employers shutting down?
- ☐ Have you noticed changes in local residents, workers or tourists? For instance: Are they younger/older? Have factories/ offices/ public sector jobs disappeared? Has the football club been relegated or the art gallery closed? Or the post office, library, pubs and restaurants?
- ☐ Are vacant shops taking longer to fill? Are new occupiers staying for shorter periods?

## WARNING SIGNS

### • Leadership

Does your town centre have a strategic plan in place? Does anyone know what's in it? But, more than that, is it widely understood by local businesses and developers? Who is responsible for setting, amending and delivering the strategy, and for managing the town centre? And, at least as important, does the leader – or do the leaders – have a clear vision of what it is they are aiming to achieve? Lack of strong leadership is a clear sign of weakness.

If that all seems OK, then take a closer look at the sort of strategy/ vision you have in place: is it purely reactive and very short-term or is it proactive, properly strategic planning that engages the local authority, businesses, landlords, etc, and truly reflects a desire to lead or drive change?

Finally, check that someone has responsibility for monitoring progress and evaluating it at regular intervals.

### • Public realm

It's not only the privately owned businesses that make a high street what it is. The role of public authorities can have just as large, if not a larger impact. Public realm investment should be made with a clear purpose and be sympathetic to the aims of the town, to create a sense of community, a real 'sense of place'. A well designed and maintained public realm that complements and connects well with its surrounding area can be important in stimulating vibrant and well used places. However, if it is not properly thought through, places can become under-used and generate an empty or desolate feeling.

Look out for poor maintenance and management – ie: the use to which the space is put – and for dwindling budgets and lacklustre design quality. Any one of these could indicate a problem and impact negatively on how people perceive and use the place.

Check too for positive aspects: are there clear focal points? Is signage, both for pedestrians and vehicles, attractive, practical and uncluttered? Similarly, look at the shop fascias: what message do they give? If they're dated and tatty, that reflects on the whole area. Depending on local conditions, it may be a matter for individual shopkeepers/landlords or it may be for the local authority. Also check the appearance of public facilities such as bus shelters, toilets, railings, grassy areas, trees, monuments, etc.

When it comes to public realm investment, quality is at least as important as quantity. It's not just lack of investment that matters. Savings on public realm expenditure may be necessary but, if not handled wisely, can fast prove very damaging to the local economy.

### • **Pride and perception**

In this case it's not pride but lack of pride that comes before a fall. The image of a place and the perception of decline, even if unjustified, can quickly catch hold and spread. For example, a facility-poor high street that has gained itself a popular image will usually win customers away from a facility-rich one nearby that has a poor image. It's essential that local residents and traders take pride in their community and feel a sense of ownership.

Ask yourself whether the atmosphere in your high street makes customers want to come back. Is it losing its value as a 'brand'? Sometimes people from outside the location are deterred by access and image problems that were solved years ago but nobody told them. You might need to market your high street more positively.

Have you really looked critically at your high street at different times of the day? For example, is it a controlled, safe environment in the evening and are appropriate cleaning services in operation to ensure it is clean and tidy for visitors the next day?

Consider too whether there is a wide enough range of services available, eg: catering? Can you get a cup of coffee? And, if so, is there somewhere relaxing to sit and enjoy it? This all counts towards changing a place into a destination.

It's no longer enough for your customers to think of your high street as just 'OK'; if that's what they think, next time they'll probably go elsewhere. You should aim for them to get pleasure from what they find there.

- **Diverse consumer offer**

Does your town centre have enough diversity on offer to meet consumer requirements and expectations? Look out for a narrowing of the offer; has the range of shops and entertainment become more limited? Or maybe it was never broad enough in the first place.

'Anchor' shops can be very important – if they move out or close down, that may spell trouble ahead; so too may new anchor shops opening in rival centres in preference to yours.

Check whether there is a good range of lifestyle retailers, of leisure, of fashion; a reasonable balance of independent stores v. large multiples. What attractions has the high street lost recently – pubs, a post office, a library, covered facilities? Maybe the loss of a market? Often people visit a town centre with a specific purpose or destination in mind; and if it disappears, so will most of its customers.

And don't neglect the tourists. Historic buildings and spaces add value and help to differentiate a town but they need to be brought up to contemporary standards, eg: for access. There is a strong link between healthy high streets and a healthy tourism offer: according to recent surveys, 55% of domestic overnight trips include shopping as an activity and 54% of people on a city holiday/break in England say they go shopping.

- **Diversity of employment**

If employment in the area has become heavily dependent on one sector, then if that sector suffers, so will the high street. A good spread of employment patterns reduces the risk.



## • Investment

If the costs of trading locally rise unsustainably and use up too high a proportion of retailers' income – especially when compared with rival centres – then potential developers and new retailers will stay away.

Sometimes this deterrent effect can be exacerbated by a fall in a centre's ranking on one of the popular commercial property databases, particularly if it drops out of the Top 100; small chains seeking to expand are most likely to steer clear.

Another strong warning sign is if banks become less willing to fund local development (or even different categories of local development) – though, of course, their decisions may reflect only what's happening inside the banks themselves or in the national economy. Similarly, the investment strategies of multiple retailers can have a major impact (either positive or negative) on local high streets.

## • Accessibility and public transport

Is the public transport appropriate to the centre/high street? Look at cost, availability, frequency and quality. Are new routes taking customers elsewhere while existing routes are cut or stations closed? Is anything being done to encourage more sustainable modes of transport such as travel planning, cycling and walking?

Are pavements, cluttered, dirty and uneven? How accessible is the high street to disabled people? Are the pedestrian environment and the signs for local facilities and transport services designed with disabled people in mind – for example, wheelchair users, visually impaired people and those with learning difficulties? Is there adequate provision for appropriate disabled car parking spaces and access? You might check whether there has been a decline in the number – or even if there's a local shortage – of mobility scooters.

Another important consideration is whether access routes to the centre are both safe and perceived as safe, especially for cyclists and pedestrians. The same is true for transport hubs as these can be target

areas for snatch thieves and pick-pockets, particularly at peak times such as after school and at closing time.

Take a fresh look at the layout of the place. Is it easy to understand or has it become cluttered and confusing? How easy is it to move around? If newcomers find it hard to navigate or there is a serious congestion problem, it's time to take action.

### • **Car parking**

The crucial issues are quantity, location, quality, pricing, security and management. Don't underestimate the problem: car parking issues are important but can be difficult to resolve.

Much research has shown how closely parking costs are linked to travel choices although the extent of the impact can vary. Often the pricing structure can be significant – eg: varying with time of day. Are you maximising the opportunity for shared use of parking spaces? Measure the peaks and flows, the time of day used, dwell time, etc. Is there always sufficient availability of good quality, secure parking? If not, it's probably affecting visitor frequency. Check too that car parks for retail outlets aren't filled with commuter vehicles and, conversely, that railway car parks aren't taken over by local shoppers' bikes and cars.

Have former car users been successfully converted to public transport or are they now going elsewhere (or online) to do their shopping?

The quality of the parking experience can be important too; for example, an ageing population may well be deterred by large multi-storey car parks located away from the shops. And are people confident that their car won't be tampered with in the car park?

### • **Inflexible opening times**

Is commuter footfall being attracted? Is your high street becoming (or has it always been) a mainly 9-5 or 5-7 high street?

It's important to be able to capture the footfall when it's in the vicinity. Beware of a long gap between shops closing and evening attractions/

entertainment starting; there needs to be a smooth transition, otherwise you may well see a decline in the evening economy – more than 25% of the national economy is accounted for by the evening/night-time economy. However, it is rarely straightforward to change opening hours, even for very logical reasons; though there may be many winners, there will always be some losers.

### • **Competing centres**

Though a new development nearby can sometimes attract extra customers to your high street, it can also drain the customer pool.

### • **Churn rates**

You don't need a large number of vacant premises before you can spot a significant reduction in demand for retail space. The first signs are often higher churn rates and vacancies taking longer to fill. Maybe you're aware too of a noticeable increase in retailers seeking to dispose of their leases.

### • **Crime and anti-social behaviour**

Abuse of substances like drink and drugs; litter, graffiti, groups of youths. Nowhere is completely free of at least some of these but watch out for any signs that they are starting to increase, or just receive more public attention. People want and deserve to feel safe. The visibility and perception of crime can trigger a decline. It might not even be happening very locally; problems in one area have an impact, for good or bad, on their surrounding neighbouring areas.

The best practical way to tackle these problems is in partnership with the police and the local Community Safety Partnership. Also engage with the local Business Crime Reduction Partnership, if one exists, ideally with local multi agency problem solving and strong links with neighbourhood policing teams as a core part of the solution.

Some imaginative joint initiatives have been set up by police and local partnerships such as Business Improvement Districts – for example,

local rangers who patrol the streets to help tackle problems with anti-social behaviour.

### • **New technologies & fashions**

Developments in technology, new trends and changing fashions can leave some kinds of business high and dry – for example: digital cameras' impact on photographic shops, downloadable music's impact on record stores; and not many shops on the high street these days are making a fortune out of skateboards or tie-dye T-shirts. It's crucial for high street traders to keep an eye on their own competitiveness and be ready to change tack before the world changes around them.

Some shops are particularly vulnerable to internet competition, while others can use it to their advantage. Though people are generally buying more online, there are many products that customers prefer to seek out and compare online before going along to the shops to see/feel/smell/try on and then buy them there. Some high street shops have taken advantage of e-technology to provide terminals for customers to select from a wider range of goods than can be held in the shop itself; on the other hand, some online traders have diversified into pop-up (or occasionally more permanent) high street shops.

## NOT NECESSARILY SIGNS OF DECLINE

- **Good shops close**

Some good retailers will leave a successful small town because they want to expand/go national/reach a larger audience. Of course, if too many leave without being quickly replaced, that is a different matter and could signal hidden problems.

- **Footfall change & downsizing**

A different pattern of footfall – and even downsizing by individual stores – may reflect a *change of behaviour* by consumers or retailers rather than a *decline* in overall shopping patterns.

- **Influx of ‘pound’ shops**

They can often drive footfall that will attract other retailers into the area. In the ten years to 2009 the number of shops with ‘pound’ in their name rose from 380 to 742: they are a long-term trend, creating a relatively new but growing market.

- **Lower rents**

Over-high rents may drive businesses away. In contrast, the creation of extra space leading to reduced but stable rents may actually attract more businesses. Of course, there are many factors that can affect the level of rents, quite independent of what is happening on the high street itself.

- **Changing environment**

More closed circuit cameras, people hanging around street corners, security guards, etc, could be signs of new kinds of activity and new types of customer coming into an area. For example, more chewing gum on the streets may just be a sign that sales of gum have gone up or that a college has opened locally bringing more young people into the area.

- **Stability**

Lack of change in a high street may reflect continued success rather than stagnation – but that’s no reason to drop your guard. You’ll still need to adapt if circumstances call for it.

- **Lifestyle changes**

It’s essential to keep abreast of changes in the retail catchment area: where potential customers live, where they work, what is drawing tourists and other visitors, levels of home ownership, car ownership, etc. For instance, has the town centre been left out of sync as the area’s age profile has changed?

Some workplace changes could be the consequence of new planning policies or a growth in home-working.

Sport too can be very influential: football is still far and away the country’s most popular spectator sport, yet businesses often underestimate just how strongly changes in the fortunes of their local football club can affect tourism, hotels, retailing and general town centre performance.

All these changes may offer business opportunities as well as threats and may well increase demand for a different range of local shops and services.

## NEXT STEPS ONCE THE WARNING SIGNS ARE THERE

### • Take responsibility

The key factors you'll need are leadership, partnership and vision. You will need to apply them to long-term strategy, to short-term marketing (customers and investors) and to stewardship of what is already in place. You'll also need to decide who is going to foot the bill – for advice on funding, see the organisations listed at the end of this guide.

- Set up a local partnership that brings together public and private groups with a common and vested interest. And when you're looking for partners, do remember to spread the net widely; think outside the boundaries you'd normally consider (eg: don't forget the local vicar and other faith leaders, the media, local bus operators, schools, the police) as well as more obvious partners such as Chambers of Commerce, the local council and your Member of Parliament.
- Is your high street/town centre part of a Business Improvement District (BID)? It's a proven way of facilitating and funding good town centre management but make sure it gives proper attention to strategic matters and doesn't become too focused on a narrow range of issues. There are more than 100 BIDs in the country, so it's no longer a new idea and there's plenty of expertise around to call on. But even if you have a BID in place, has anyone taken steps to include the local property owners? Make sure you're doing everything possible to encourage them to support it.
- Confidence in the leadership is key to success. So, though it's good to have many partners involved, you definitely don't want too many leaders – ideally just one public sector and one private sector representative. Then these two need to lead their own teams and work together effectively. Collective responsibility is very often the answer if one party is unwilling to let the other take the lead.

- Often local leadership can be provided by an enthusiastic and knowledgeable town centre manager (TCM), though the TCM needn't be one person: it can be a management team or it can be someone employed by the council, by the BID or maybe by a not-for-profit team. Inspirational, reliable leaders make a huge difference in restoring a sense of pride, one of the vital ingredients in any recovery plan.

### • **Strengths and perceptions**

Do you really have a good grasp of how space is used in your town centre, or do you just think you do? Work with local businesses, organisations and individuals to map the high street to illustrate what people use and the areas they visit.

Then track the perceived and the actual for possible mismatches: what people say they want from their high street doesn't always match the use they make of facilities – possibly use a survey to do this. Is there a greater emphasis on retail, leisure or the night-time economy?

You also need answers to the important questions of what makes consumers come to an area or stay away and why are they now choosing to shop in neighbouring centres, not yours – possibly use focus groups to find the answers.

Once you've established who is currently using different parts of the town centre, seek to broaden their appeal – which additional shops would help? How can you attract large 'anchor' retailers and/or sympathetic developers? Or how about investing in better design?

Could you do more to attract tourists and occasional visitors? – for example, festivals, cultural and live music events, theatre/performing arts and markets can make a real difference to making people feel welcome (and, of course, will also benefit the local community).

Another important ingredient can be the provision of sympathetic tourist accommodation, both welcoming and suitable for the location.



## • Manage expectations

A desire to return to a golden age, eg: as a market town, may be unrealistic – make sure it's what's really wanted, would be commercially viable and is achievable within existing resources. Anyway, do you really want to take the risk of going back rather than looking forwards?

The partnership must be prepared to think outside the comfort zone of history or tradition (“but this centre has always been/done X”). Ask the question: should vacant sites always be shops? Consider alternatives, eg: housing. Responsible downsizing really is a valid option and far better than futile efforts to maintain the status quo.

If developers are interested, then work with them, closely and professionally: don't ignore the very people who want to give you money; they can always take it elsewhere.

## • Information and benchmarking

Good information is crucial if you're going to turn things round, particularly a consistent suite of statistical indicators. It will enable you to measure what's going wrong, how quickly it's being put right and will let you benchmark your own high street against similar ones elsewhere in the region (or the country).

A 'pick'n'mix' suite of statistical indicators is better than concentrating on a narrow, prescriptive one or two: different centres have a different range of complex characteristics so your indicators should reflect that. And don't get too hung up on exact figures: they aren't important, but trends are.

While you're working out what to measure, also work out who's going to pay for it. Sometimes it may come down to bartering rather than payment – an exchange of information that benefits both sides.

Businesses may be reluctant to share information but, if they are willing, then monitor the level of sales and/or customer satisfaction. Keep an eye on where your centre fits in the commercial rankings (eg: Experian). Other possible indicators include average spend; tourist

spend; what proportion of customers' spend is in the high street, what proportion elsewhere (and why) and what proportion is on-line.

- **Investment**

If investors shy away, don't just sit back and accept that. There's always a chance to convince them through persuasion and a good business case. The 'people approach' ought to be a vital part of your toolkit.

Of course, as well as any investment in new development, it's vital to invest (or invest more) in managing the present high street – those funds will need to come from, or be generated by, existing stakeholders.

- **Address the basics**

Safety and cleanliness. Also think about visuals, eg: Christmas lights and organised events/attractions BUT don't just paper over the cracks by hanging a few flower baskets and providing more bins. Make sure you address the underlying problems.

- **Cyclical v. structural**

Identify which problems are *cyclical* (need tackling with short-term measures, eg: a fall in sales due to a short-term recession ) and which more *structural* (eg: loss of a market, of a local industry, a change in shopping patterns away from the one big weekly shop, the impact of multi-channel shopping). In tough times – ie: cyclical – the 'top-end' luxury shops and the 'bottom-end' value shops tend to do better, with the ones in the middle suffering most.

- **Profit from change**

Make sure you are capitalising on changes in consumer profile. Is the age of your high street's users going up or down, or possibly both? Be alert to new residential units or developments nearby. Similarly schools and other educational establishments, sports clubs, hotels and cultural venues can bring new and different customers onto the high street.

## A selection of organisations you can contact for more information about some of the topics in this guide

Action for Market Towns	<a href="http://www.towns.org.uk">www.towns.org.uk</a>
Association of Business Crime Partnerships	<a href="http://www.businesscrime.org.uk">www.businesscrime.org.uk</a>
Association of Convenience Stores	<a href="http://www.acs.org.uk">www.acs.org.uk</a>
Association of Town Centre Management	<a href="http://www.atcm.org">www.atcm.org</a>
BHF-BSSA Group (association for independent non-food shops)	<a href="http://www.bhfgroup.co.uk">www.bhfgroup.co.uk</a>
British BIDs	<a href="http://www.britishbids.info">www.britishbids.info</a>
British Chambers of Commerce (or your local Chamber)	<a href="http://www.britishchambers.org.uk">www.britishchambers.org.uk</a>
British Council of Shopping Centres	<a href="http://www.bcsc.org.uk">www.bcsc.org.uk</a>
British Property Federation	<a href="http://www.bpf.org.uk">www.bpf.org.uk</a>
British Retail Consortium	<a href="http://www.brc.org.uk">www.brc.org.uk</a>
British Urban Regeneration Association	<a href="http://www.bura.org.uk">www.bura.org.uk</a>
Business in the Community	<a href="http://www.bitc.org.uk">www.bitc.org.uk</a>
Business Link	<a href="http://www.businesslink.gov.uk">www.businesslink.gov.uk</a>
Commission for Architecture and the Built Environment	<a href="http://www.cabe.org.uk">www.cabe.org.uk</a>
Federation of Small Businesses	<a href="http://www.fsb.org.uk">www.fsb.org.uk</a>
National BIDs Advisory Service	<a href="http://www.ukbids.org">www.ukbids.org</a>
Royal Town Planning Institute	<a href="http://www.rtpi.org.uk">www.rtpi.org.uk</a>
Town and Country Planning Association	<a href="http://www.tcpa.org.uk">www.tcpa.org.uk</a>
Your local Community Safety Partnership	
Your local council	
Your local town centre manager (which may be a Business Improvement District)	

*This list has been selected for users in England. Those in other parts of the UK will find much of it equally helpful but may also have other relevant organisations closer to home.*

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Printed in the UK on recycled paper containing a minimum of 75% post consumer waste.  
Department for Business, Innovation and Skills. [www.bis.gov.uk](http://www.bis.gov.uk)

First published November 2010. Crown Copyright. BIS/10k/11/10/NP. URN 10/1224