



High Street Futures: Setting the Scene

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National & Retail Planning – 6 Killer Facts

- Currently assisting on 10m sq ft of retail/mixed use development in the UK.
- Work for both private and public sector.
- Working on approximately 8,000 homes across the residential schemes we do.
- Engaged in both town centre and out of centre markets.
- We have some sites measured in square km, not hectares!
- We are commercial planners, not academic anoraks!

EVERYONE HAS A VIEW....

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- The historic evolution of settlements and development.
- To review some key planning tests.
- To ponder – where do we go from here?

The Historic Development of Settlements

- Pre-Victorian - Geographic Historic Development
- Victorian – Slum clearance, mass building and infrastructure provision
- Post War – Reconstruction and new towns: homes for heroes and Garden Suburbs – the state of the mass produced housing market
- 1960's - Comprehensive Redevelopment
- 1970's - Complexity, Quality and Scale
- 1980's - Fragmentation & Out of Centre
- 1990's - Out of Centre pressure & forced refocus on Town Centre
- 2000 - Town Centres as primary focus, sustainability
- 2008 – Recession, administrations, the rise of the food store anchors and the drift from town centres (again)
- 2011 – Portas and Omni-channel

RECESSIONAL PRESSURE

- Employment / Uncertainty
- Disposable incomes pressured
- Failing companies

	Companies Failing	Stores Affected	Employees Affected
2013 (end Jan)	10	1,148	12,419
2012 (12 months)	54	3,951	48,142
2011 (12 months)	31	2,469	24,025
2010 (12 months)	26	944	10,930
2009 (12 months)	37	6,536	26,688
2008 (12 months)	54	5,793	74,539
2007 (12 months)	25	2,600	14,083

- Estimated town centre shops have fallen by 15,000 2000-2009
- ...and a further 10,000 2009-2011!
- The creation of a 'cycle of vacancy.'

STRUCTURAL AND SOCIAL CHANGE

- The rise of online retailing
- The rise of 'omni-channel' retailing
- The smart phone generation
 - 80% of smart phone users use device while watching TV
 - Purchases on smart phones up 500% in last 2 years
 - Tablets and laptops facilitate further 'on the move' purchasing
- The 'me' generation
 - Social Media
 - Unique propositions
 - Twitter and bragging rights!
- A generation of shoppers without shops

Planning Control – the state that we're in!

THE DEVELOPMENT PLAN

- (1) Regional Spatial Strategy (RSS) for an area
- (2) Local Plan or UDP

Always the first point of call when looking at planning issue:

'... whether a development is in accordance with the development plan' (Section 38(6))

BUT!

- Government has put on record its intent to scrap Regional Strategies in 2010, but has not fulfilled through legislation
- New System to replace Local Plans / UDP's of 'Local Development Frameworks' suggested in 2004 but only achieved 20% coverage
- The Localism Act 2011 and National Planning Policy Framework (NPPF) 2012 has suggested a new 'local plan and neighbourhood plan' system.

Guidance for Retail Development

- Previously focussed on Planning Policy Guidance Note 6 (1996) (PPG6)
- Not a robust document which required clarifications of interpretation:
 - through appeal decisions considered by the Secretary of State
 - via the Courts in challenging those decisions; and
 - explicit clarification by the Government (1999 and 2003)
- WAS REVIEWED in 2005 and became Planning Policy Statement 6 (PPS6)
- FURTHER REVIEW in 2009 to PPS4 'Planning for Sustainable Economic Growth'
- ... AND NOW REPLACED BY THE NPPF (2012)!

National Guidance for New Retail Development

- Key difference is that the NPPF focuses on 2 key tests for retail and other town centre development:
 - A ‘Sequential’ Assessment (Para 24)
 - An ‘Impact’ Assessment (Para 26)

Key Tests – Policies for Town Centre Development

BUT:

... DO THESE TESTS REMAIN RELEVANT?

- Sequential test is challenged
- Vitality and viability across a broad church
- Impact on public and private investment strategies needs to be 'balanced' politically...
- ... with jobs, investment and growth

Where are we going?

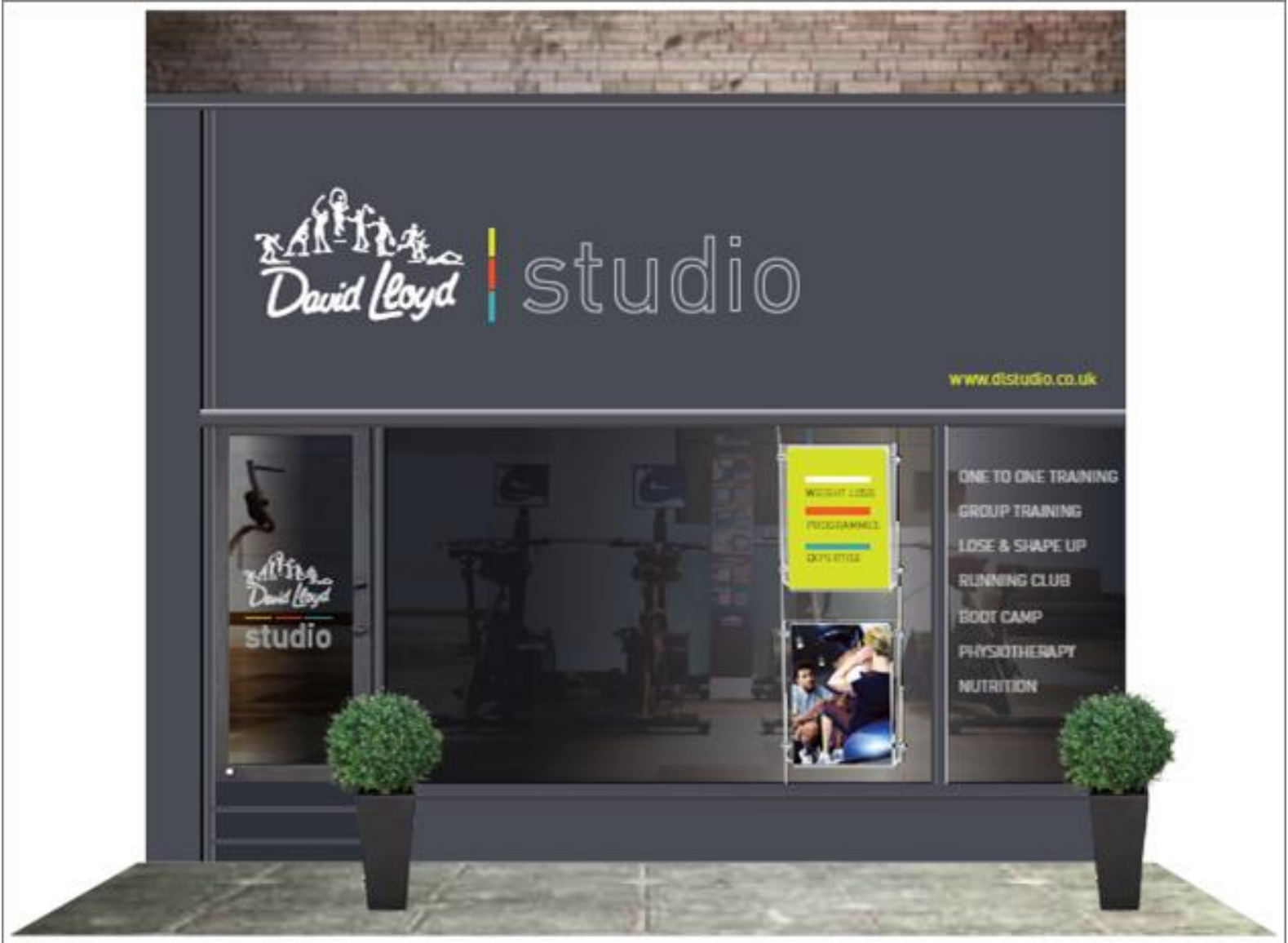
- Failure of the High Street
- The Omni-channel revolution
- Focus on 'Jobs, investment & Growth'
- The increasing threat from out of town retail
- Portas Review – need to look beyond retail
- A real watershed for town centres

BUT Where are we going?

KEY PLANNING CHALLENGES

- Need to be realistic
 - Its right that we remain 'Town Centres first'
 - But some may not survive
 - Focus on strengths / USP's
 - Can't wind back the clock / pickle in aspic
 - Adapt and survive: click and collect
- Re-imagine town centres
 - Places to enjoy
 - Places to 'dwell'
 - Places to live
 - NOT just places to shop
- Flexibility in frontage policies
 - Look beyond shops

A Case Study?



A Vision for the Future?

