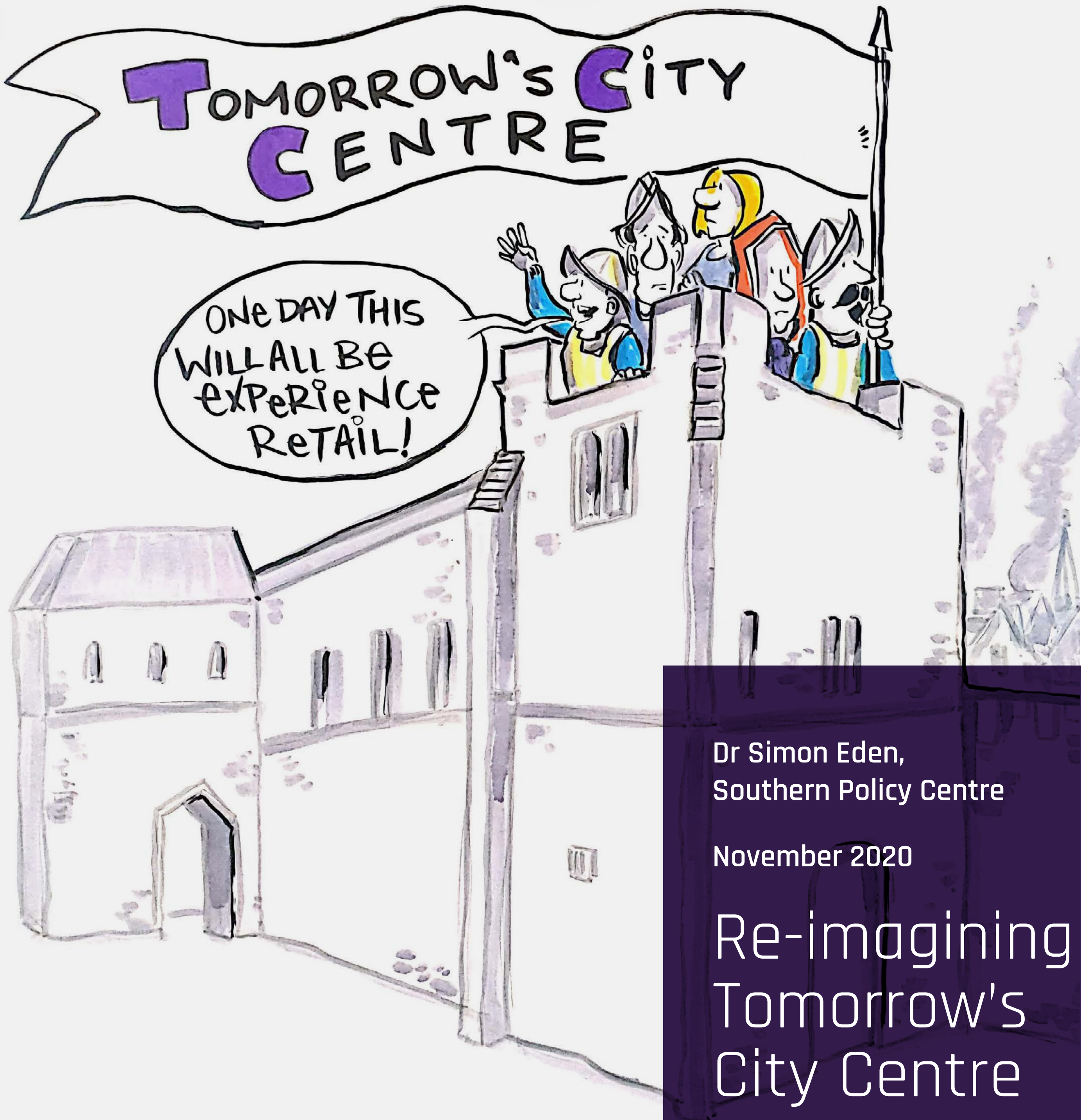

Dr Simon Eden,
Southern Policy Centre

November 2020

Re-imagining Tomorrow's City Centre

Southern Policy Centre

BLAKE MORGAN

Re-imagining Tomorrow's City Centre

Contents

All illustrations by Drawnalism

Re-imagining Tomorrow's City Centre

Foreword from Daniel Curtis, Partner, Blake Morgan

When Simon Eden and I first discussed this research project in March 2019 the future of our city centres was a constant theme in the media, with a limited narrative focused on the 'death of the High Street'. Our city centres are so much more than just retail. They are places where people live, interact, play, work and learn (to name but a few). City centres are a focal point for local communities. Successful city centres make their communities proud. Conversely, a failing city centre can drain the confidence of a community. People want to be proud to be from a particular place.

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As you will see in the following pages of the report, the Southern Policy Centre has discovered many themes affecting our city centres.

As you will see in the following pages of the report, the Southern Policy Centre has discovered many themes affecting our city centres. It will come as no surprise that the pandemic has exacerbated many of these themes. However, the arrival of Covid-19 has also brought new ways of tackling issues in our city centres and, in some cases, brought about change in a very short space of time (far quicker than would ordinarily be the case). It will be a great shame if this impetus is lost.

I hope you find the report interesting and engaging. It is purposefully designed to start discussions rather than being a dry list of recommendations that will quickly become out of date. The city centres we researched are diverse and face their own challenges; but also have unique opportunities. The businesses, public bodies and members of the public that have contributed to the research all highlighted the many possibilities that exist to change and evolve our city centres for the better. However, it is up to all of society to contribute to that evolution to make it as successful as possible.

Many people have contributed to the research and I thank them all for their contributions. I thank Ruth Eastwood and Rebecca Whitehead for their help and assistance throughout the project. I would like to finish by thanking Simon Eden at the Southern Policy Centre for his many hours of work on the research project and for producing this excellent final report.

Re-imagining Tomorrow's City Centre
Chapter 1: Introduction

Archaeologists tell us that the world's first cities developed in Mesopotamia, modern-day Iraq, over 6,000 years ago. At the heart of those emerging cities was space for people to meet, trade and worship.

The UN has estimated there are now 4,416 cities with populations of over 150,000 in the world, with more than half the world's populations living in urban areas.

The UK Government identifies 64 cities which are each home to more than 125,000 people. The 2011 census showed that over half (54%) of the UK's population lived in those larger cities. And since the beginning of the millennium their population has grown faster than that of other parts of the country.

But despite, or perhaps because of, their success, our cities face many challenges: poor quality and expensive housing, greater social inequalities or rising crime. These are regular items on our news and other media. Our city centres, once the great gathering points for communities, home to markets, theatres, museums and public services, are now threatened by huge economic and social changes, from how we shop and spend our leisure time through to our patterns of work and the cost of urban property.

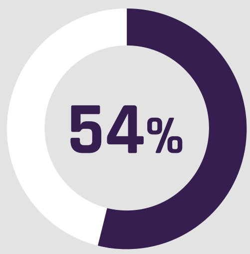
Blake Morgan wants to understand how cities in the central South are responding to these challenges and have asked the Southern Policy Centre to explore what the future holds for our city centres. This report summarises our research and the conclusions we draw about how best to shape tomorrow's city centre.

This is not a report which offers a recipe for 'recovery' or 'revival' of city centres. We are more interested in understanding how city centres are changing, not how they might re-establish a model which, in the words of one participant is clearly "broken". Our study endeavours to uncover what is changing, and what local people want to see change, and discusses how we might go about creating a future for the city centre.

As we began to put this report together the UK went into 'lockdown' in response to the threat of Covid-19. As we launch it, we are in the middle of a second lockdown. The Country, our cities and their centres, may well emerge from this as different places. We hope this report offers some insights into what those places could and might look like.

125,000

The UK Government identifies **64** cities which are each home to more than **125,000** people



The 2011 census showed that over half (**54%**) of the UK's population lived in those larger cities.

In summary, the report is structured as follows:

Chapter 2 outlines our methodology and the data used

Chapter 3 examines key trends affecting our city centres, from changes in retail through to the impact of lockdown driven by the threat of Covid-19

Chapter 4 summarises our approach to gathering the views of local residents and businesses

Chapter 5 explores the changing role of city centres as places to shop, live, work and play, drawing on interviews and the views of local residents

Chapter 6 considers what is driving change

Chapter 7 outlines what we believe local people want from their city centre

Chapter 8 considers whether the Covid-19 emergency is creating a 'new normal'

Chapter 9 looks at what factors might shape tomorrow's city centre

Chapter 10 considers the way forward

Chapter 2: Methods

Our study looks at the central South's cities: Portsmouth, Southampton, Winchester and the conurbation of Bournemouth, Christchurch & Poole, referred to in this report as BCP. This latter area is governed by the new unitary authority of Bournemouth, Christchurch & Poole Council, and, whilst it has not been granted city status by the Queen, we consider that, as a major conurbation with over 400,000 residents, it can justifiably be regarded as the central South's fourth 'city' for the purposes of this study.

Chapter 2 sets a context for the changes our city centres are experiencing, looking at the rates of change in population, along with data on how patterns of shopping, living, working and enjoying leisure time in our cities are changing. It is these local and national trends which will shape how tomorrow's city centres will function. Data sources are given in the references section.

All population data are taken from Office for National Statistics (ONS) population projections for local authority areas.[1] Data for BCP represent combined population forecasts for pre- 2019 local authorities. Note that some references are to "Bournemouth" which describes data relating to the former Bournemouth Borough Council area only.

Most of the data in Chapter 3 (i)-(vi) were collected before the lockdown introduced to tackle the Covid-19 outbreak, and so provide a baseline for looking at the impact of those events, which is discussed in 3(vii).

There are a number of definitions of the city centre. The Centre for Cities, for example, base it on all the postcodes that fall within a circle from the pre-defined central point. The radius of the circle depends on the size of the residential population of a city as follows:

- **London** – radius of 2 miles.
- **Large cities** – radius of 0.8 miles.
- **Medium and small cities** (this category includes all of the cities we studied) – radius of 0.5 miles.[2]

The Ordnance Survey, in collating data on UK High Streets (which, along with city or town centres, also include local centres) look for clusters of 15 or more retail premises within 150m[3]. Whilst the ONS definition of the High Street is not limited to the principal retail street in a town or city (i.e. the centre), this study uses ONS data based on High Streets where it illustrates a trend which we believe affects the city centre.

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There are a number of definitions of the city centre. The Centre for Cities, for example, base it on all the postcodes that fall within a circle from the pre-defined central point.

The other significant driver of change is the people who use the city centre, whether they live there or visit to shop, to work or spend their leisure time. Our study also tries to understand the hopes and expectations of those using the city centre (whether as residents or visitors), the key people whose opinions should inform policy-makers – local councils, business organisations, even the National Government – as they plan for the future.

We used a number of different approaches to understand how people use city centres today and their ideas for the future. In all cases we asked people how they saw the city today, its strengths and weaknesses, and how they believed it would evolve over the next 20 years. We asked them to suggest what ought to happen to make tomorrow's city centres the sort of places they would want to live, work or spend time in.

In seeking people's views we did not follow a rigid definition of the city centre. We are interested in perceptions rather than geographies, so we did not try to delineate the centre but encouraged people to think of how they saw their city and what they regarded as its centre. Each of our participants may have had in mind a slightly different geography of the city centre, but we do not believe that undermines our conclusions. However, our surveys and facilitated groups used simple maps to stimulate discussion about how people see the centre – these can be found on the **SPC website**.

Chapter 2: Methods (continued)

This report is based on:

- A series of interviews with those in business, local authorities and other bodies who help shape our city centres – all those we spoke to are acknowledged at the end of this report.
- A survey to understand how people use city centres today and how they expect them to change. We received 120 responses, which are summarised in Chapter 4.
- A breakfast meeting with owners and managers of SMEs from Winchester city centre, arranged by Winchester Business Improvement District.
- Three seminars with young people (aged between 11 and 19) from BCP, arranged by BCP Council's Children's Services Inclusion & Families Team – see Chapter 4.
- A facilitated discussion with a cross-section of Southampton's residents, who discussed their city centre with experts in retail, housing, leisure and employment – see Chapter 4. Our methodology was developed with colleagues at the University of Southampton's Department of Politics & International Relations and is summarised on the city centre pages of SPC's website.
- A series of small-group discussions with residents of Portsmouth, seeking their views on their city centre today and how they saw it developing in the future.

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The body of this report does not analyse these different approaches separately but attempts to draw on all we learned from the surveys, discussions and meetings in suggesting how we should see the future.

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To help us understand how people see our city centres and how they might change we explored the four different roles of those centres: as places to shop, live, work and play. The last of these, cities as places to play, includes activity ranging from eating or drinking at bars and restaurants, visiting facilities such as theatres or cinemas, attending public events such as festivals and carnivals or simply meeting friends or relaxing in parks and gardens.

Whilst this is a relatively simple characterisation of what are complex places, it provides a useful framework to help us understand both how people see the centre today and what they would like the centre of tomorrow to offer. Chapter 5 summarises contributions by participants on each of these roles.

The images you see throughout this report were prepared by Matt Buck and Alex Hughes of Drawnalism. They reflect the topics discussed at various events and seminars.

Chapter 3: Our cities

This chapter provides background data on the trends our city centres are experiencing. Sections (i) to (vi) explore trends and changes pre-March 2020. The chapter ends by exploring the impact of the lockdown introduced to tackle the Covid-19 outbreak.

Our aim here is not to provide a comprehensive review of trends, regularly updated information on everything from footfall to internet spend levels or office rents can be found elsewhere – see references given in this chapter. Rather, we have used these data to illustrate the nature and magnitude of changes facing our city centres.

i) Population

Our Country, along with the rest of the world, is becoming an increasingly urbanised place. The degree of urbanisation in the United Kingdom amounted to 83.1 percent in 2017. This shows almost a three-percentage point increase over the past decade. The upward trend, though slow, has been consistently positive.[4]

As Table 1 shows, the population of three of our four cities is projected to rise faster than the England average, and all four will grow faster than the surrounding more rural areas of Dorset and Hampshire.

The Centre for Cities has shown that urban growth is focused in city centres. Of the central South's cities the centre of Southampton has seen its population grow by 94% (2002-2015), whilst Bournemouth's centre has grown by 40% and Portsmouth's by 18%.[5] They suggest the biggest contributor to growth are younger, degree educated people moving into the centre (Table 3 shows data on student populations of our study cities).

The Office for National Statistics, in a study of High Streets (n.b. – its definition is based on all retail locations, not just city centres – see methods), found that the population is growing faster around those streets: 13% of the South East's population lives within 200m of a High Street, and that population is growing at a faster rate (at 6.2% between 2012-17) than the number living elsewhere (3.8%).[6] This supports the suggestion that our population is urbanising, and growing fastest near urban centres.

The forecast population changes are not uniform across all age groups. Table 2 shows that there are, and will continue to be, more 15-34 year olds in our cities and fewer aged 65+ when they are compared with less urban surroundings. However, it's worth noting that whilst the proportion of those under 34 in the central South's population increases only slightly, it is clear older people will make up a larger proportion of the community in our cities, as elsewhere, by 2040.

POP^N. PROJECTION, ALL AGES ('000S)			
	2020	2040	% Change (2020-40)
BCP	403.4	440	9.1
Portsmouth	217.7	235.2	8.0
Southampton	257.0	280.3	9.1
Winchester[a]	126.7	138.8	9.6
Hampshire[b]	1265.9	1358.9	7.3
Dorset[c]	378.7	403.8	6.6
England	56704.7	61743.7	8.9

Table 1 Population projections for the central South and England as a whole, 2020 and 2040 (Source - ONS)

Notes a - data for Winchester show the whole district population, the historic city and its suburbs are home to about 50,000 people
b - Hampshire excludes Portsmouth, Southampton and Winchester
c - Dorset excludes Bournemouth, Christchurch and Poole

PERCENTAGE OF POPULATION BY AGE COHORT TODAY AND IN 2040						
	2020			2040		
	15-19yrs	20-34yrs	65+yrs	15-19yrs	20-34yrs	65+yrs
BCP	5.4	18.8	21.7	5.7	18.4	27.8
Portsmouth	6.4	26.8	14.3	6.8	26.4	19.1
Southampton	6.5	29.6	13.4	7.2	29.5	16.8
Winchester	6.7	16.4	21.5	6.9	16.3	27.7
Hampshire[a]	5.2	15.9	22.1	5.2	15.3	30.1
Dorset[b]	4.9	12.7	29.4	4.9	11.8	37.8
England	5.5	19.5	18.6	5.7	18.6	24.1

Table 2 Share of the population in younger and older age categories across the central South, 2020 and 2040 (Source - ONS)

Notes a - Hampshire excludes Portsmouth, Southampton & Winchester
b - Dorset excludes Bournemouth, Christchurch & Poole

The high proportion of young people in our cities reflects the fact that all of the four cities studied are home to a University, with Bournemouth and Southampton each hosting two, and Southampton's School of Art being based in Winchester along with the University of Winchester. Table 3 shows that students make up a significant proportion of the population, most notably in Portsmouth and Southampton: one in 10 of Southampton's population are students. As the Centre for Cities has noted, much of the student population lives in the city centre, indeed these centres have seen much new purpose-built student accommodation in the past few years.

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Gunwharf Quays, Portsmouth

City	University	No. Students (2018/19)		City Population '000s (2018)[a]	% Students
		Institution	Place		
BCP	Arts Bournemouth	3,075	16,795	399.1	4.2
	Bournemouth	13,720			
Portsmouth	Portsmouth	18,470	18,470	215.8	8.6
Southampton	Solent	10,400	27,455	254.2	10.8
	Southampton	17,055			
Winchester	Winchester	6,045	7,545	125.0	6.0[c]
	Southampton	1,500[b]			

Table 3 Number of students at HEIs in the central South's cities and the proportion of the population they represent (source – ONS)

Notes a - students are recorded by ONS at term-time address, and so are included in total population figures
b – many of the students at Southampton School of Art live in halls or accommodation in Southampton
c – population is for the whole district, students make up around 15% of the historic city's population

ii) Housing

All of our cities have seen a growth in housing numbers in recent years, with much of that growth focused on city centres: indeed housing has been a key component of regeneration plans for all our cities.

Southampton's Local Plan for the period 2006-26 proposed an additional 5,450 homes are built in the city centre – around one-third of its total target. Portsmouth's Local Plan (2012-27) seeks a further 1,600 new homes in its city centre – around 20% of the total proposed. A significant number of those planned in both cities are for students.

In Bournemouth 1,500-2,000 new homes were planned for the city centre (10-14% of the Borough's total) between 2006 and 2026, with Poole proposing 6,000 out of 14,200 planned between 2013 and 2033 in the town centre (42%). Only Winchester, with its compact city centre, proposes more development in the city's suburbs.

Flats are characteristic of the centre and there tends to be a high turnover: ONS record that in 2017 71.3% of the South East's residential property transactions for homes near the South East's High Streets were for flats, with only 16.1% for terraced houses. Over 50% of property sales in Bournemouth in 2015 were of flats or maisonettes, in Poole and Southampton it was around one third.[8] On the plus side, those properties are generally cheaper in the city than in suburban or rural areas.[9]

iii) City Centre Businesses

ONS's study of High Streets – which they defined by clustering of retail businesses – showed that, whilst these areas had seen business growth between 2012 and 2017, that growth had been lower in the High Street (at 7% in the South East) than elsewhere (18%). The South East also showed a small decline in the numbers of businesses on High Streets over the same period (-3%) whereas numbers increased elsewhere (8%).[10] These numbers suggest that all of our traditional retail centres – including the city centre – have been hit by a move to non-traditional locations, for example out-of-town.

The same study shows the mix of businesses on High Streets and the change over the years 2012-2017, summarised in Table 4a. Table 4b shows the same changes in the mix of employment across each sector, in this case just for the South East.

Both sets of data suggest a decline in retail, with food and accommodation-based businesses growing significantly, both in numbers and number of employees.

	4a: High Street business mix		4b: High Street employment mix	
	UK High St % Share	UK % change 2012/17	SE High St % Share	SE % change 2012/17
Retail	25	-2	28	-4.4
Accom/Food	14	20	17	31.7
Health/Ed./Public	6	8	37	n/a
Other Service	42	25	10	6
Other	13	20	9	n/a

Tables 4a and 4b – business mix on UK High Streets and Employment by sector in the South East's High Streets (Source: ONS)

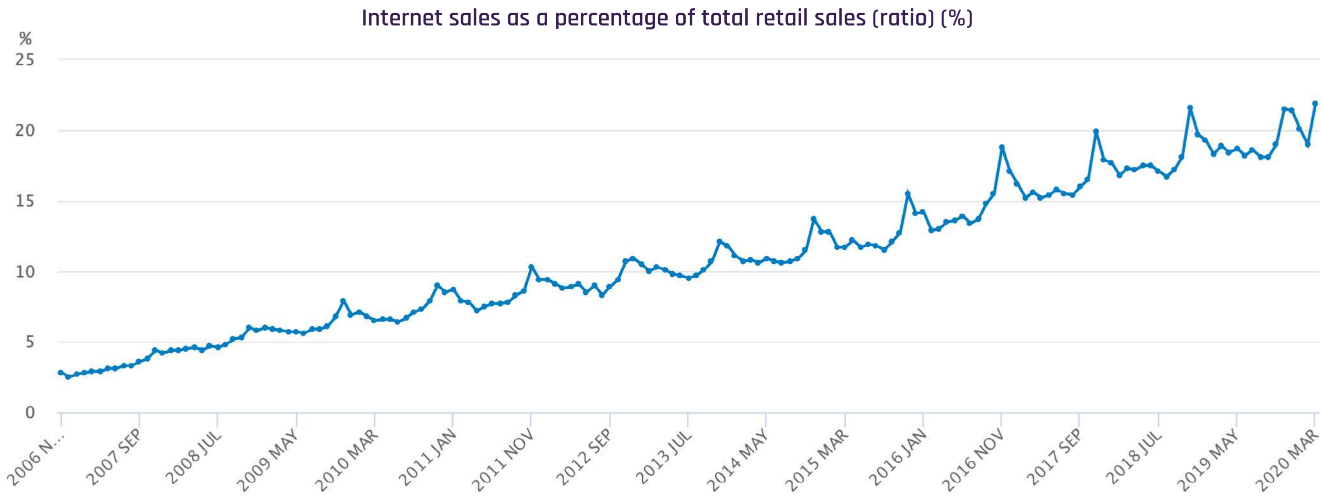


Figure 1 - Internet sales as a percentage of total retail sales – data to March 2020 (Source: ONS)

iv) Retail

The challenges facing retail businesses in our cities, whether in the city or town centre, or local centres, are well documented:

- across the UK vacancy rates in retail premises were 13% in the first half of 2019, the highest since August 2015 – closures (25,672) exceeded openings (22,115) by over 3,500[11]
- the six months from January to June 2019 saw a record net 1,234 closures in High Streets, with the main victims being fashion outlets, pubs, bars and restaurants. There was, however, net growth in some areas, notably in takeaways, sports and health clubs and pet shops[12]
- UK High Street footfall has fallen 10% in the seven years to September 2019[13]
- a steady rise in internet sales: on-line sales represented 20.1% of total sales in January 2020, a big increase from the 12.8% they made up in January 2015. By March 2020, as the nation went into lockdown, they had increased to 21.9% of sales – see Figure 1 (see section *vii* below for post-lockdown changes).

Notwithstanding this picture of decline, local authorities continue to plan for a growth in retail floor space: Southampton's Local Plan proposes 200,000 sqms of new retail and office floor space in the centre – nearly three more West Quays – whilst Portsmouth is also trying to improve its retail offer with an additional 50,000 sqms of retail space in its city centre, and BCP Council is seeking 23,000 sqms of additional retail floor space in Bournemouth and 14,500 sqms in Poole.

v) Offices

Prior to the spring of 2020 analysts were regularly reporting a healthy demand for offices in city centres, particularly for new space. They noted certain sectors were strong: finance and the creative industries, both strong in the central South, saw particular growth.[15] They also reported a growing demand from those providing flexible office space. This consistent demand led to a steady, if unspectacular increase in rents – although concerns surrounding Brexit have recently suppressed demand. All of the central South's cities have seen a growth in new office building in recent years, with Local Plans outlining aspirations for continued building to support economic growth (see above).

vi) Other Trends

City centres are not just about shopping, and other data suggest that, at least prior to the national lockdown, some non-retail sectors were doing well. There has, for example, been a steady increase in attendance and sales at theatres outside of London between 2013 and 2018.[16] Similarly, cinema attendance has increased in the past decade[17], whilst the decline in the number of out-of-town multiplexes is matched by new independents opening in town and city centres[18] - although it is sad to see how the Theatre (NST City) which opened in the centre of Southampton in 2018 has been hit by the Covid-19 crisis.

Although cities are widely seen as congested, research by the Independent Transport Commission shows that use of cars in built-up areas fell between 1996 and 2014, with a parallel rise in the use of rail – important to all of the central South's cities.[19] Although our cities do attract commuters working in the centre, local residents also travel to work elsewhere, so that Bournemouth and Southampton both see net out-commuting.[20]

Chapter 3: Our cities (continued)

The quality of the local environment is also an important factor in city centres. Whilst it is nowhere near to the London smog of the 1950s, air pollution in cities today can be as damaging. All of the central South's cities experience high levels of harmful atmospheric pollutants: particulate carbon, sulphur dioxide and nitrous oxides.

The Centre for Cities found the poorest air quality was in cities in the South of England, with Bournemouth having the worst Daily Air Quality Index of the 63 cities and larger towns studied, and Southampton third worst behind London.[21] The majority of that pollution is caused by combustion of fossil fuels, and the report also showed that, in city centres, 26% of pollution is from road transport.

Cities are a focus for health inequalities, a consequence of many factors, ranging from pollution or poverty to social pressures or a lack of green space.[22] This is as true for mental as physical health: cities are associated with higher rates of most mental health problems compared to rural areas - an almost 40% higher risk of depression, over 20% more anxiety, and double the risk of schizophrenia, in addition to more loneliness, isolation and stress.[23]

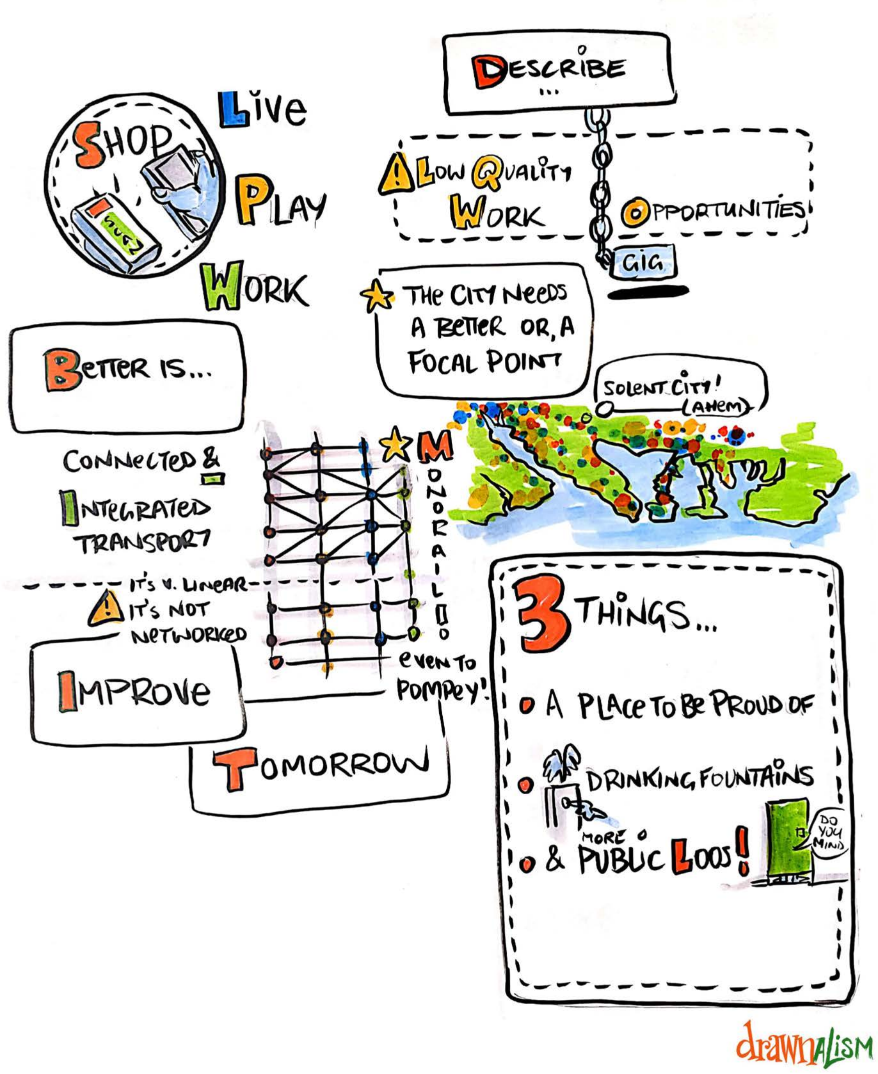
vii) Impact of Covid-19

The data in sections (i) to (vi) of this chapter all refer to the period before 23 March 2020 when the Prime Minister announced a lockdown to combat the Covid-19 virus. With people being encouraged to stay at home and many retail, leisure and office-based businesses being closed there was an inevitable and dramatic impact on city centres, including:

- High Street footfall fell by 81.6% in May 2020 (by comparison with the previous year).[24] Consumer spending immediately fell dramatically: bank data shows overall consumer spending in the week ending 7 April was down by 34% across the UK by comparison with the same period in 2019, with a small increase in food spend outweighed by a massive decline in non-food spend (see Table 5 for local data). Whilst these numbers reflect spend across the economy, they nevertheless give an indication of what city centres businesses faced early on in the crisis.

	Change in spend (% - in w/e 7/4) by comparison with previous year			National rank (of 172)
	All Spend	Food Spend	Non-food Spend	
Bournemouth	-51	+10	-63	28
Poole	-38	+14	-51	105
Portsmouth	-40	+15	-40	90
Southampton	-31	+11	-41	144

Table 5 – year-on-year changes in consumer spend across the economy, based on bank data. Table shows % change in spend for food and non-food items for week ending 7 April 2020 (Source: Tortoise[25])



- The proportion of consumer spend on-line rose at a rate of around 1.5% a year between March 2010 and March 2020. In May 2020, two months into lockdown, the proportion peaked at 32.8%, 10.9% above its March level. In August 2020 it fell slightly to 26.6% as some shops re-opened, but continues to exceed pre-lockdown levels.[26]
- A reduction in the number of weekday commuters travelling into the centres of our coastal cities and in their Saturday share of total weekly visitors (Table 6). These are measures of reduced worker and visitor foot traffic and show what we all saw – our city centres became much quieter as lockdown bit.
- Office rents are predicted to fall, a consequence of stalled deals, increased vacancies and lease breaks. This is in part driven by homeworking becoming 'the norm' for many, resulting in a slow return to the office. Many companies are already supporting radical change in employee working practices.[28]

At the time of writing we are entering a 'recovery phase', albeit with ongoing restrictions and rules which are regularly modified in response to epidemiological data. People are slowly returning to work, shopping and leisure activities as we see phased re-openings punctuated by local closures snd most recently a second short England-wide lockdown.

The Centre for Cities produce a recovery tracker, which looks at the number of people in the city centre, whether during workdays or weekends, daytime and in the evening, based on anonymised data from mobile phone tracking. Table 7 shows the activity in Bournemouth, Portsmouth and Southampton (which Centre for Cities monitor) for the beginning of July 2020.[29]

	Percentage reduction in the number of weekday commuters (to 20/3/20)	Percentage reduction in Saturday share of users of the city centre (to 21/3/20)
Bournemouth	19	62
Portsmouth	14	38
Southampton	24	64

Table 6 – month-on-month comparisons of the number of weekday commuters and Saturday visitors in the central South's coastal cities (no data are available for Winchester) (Source: Centre for Cities[27])

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Office rents are predicted to fall, a consequence of stalled deals, increased vacancies and lease breaks. This is in part driven by homeworking becoming 'the norm' for many, resulting in a slow return to the office.

	Bournemouth	Portsmouth	Southampton	Average[a]
Overall Recovery Index[b]	69	72	59	45
Workers Index	28	20	20	17
Weekend Index	74	87	62	55
Nightime Index	38	45	34	32

Table 7 – the fall in city centre workers and visitors in the central South's coastal cities. Figures are an index showing numbers at the beginning of July compared to a pre-lockdown baseline of 100 (source – Centre for Cities)

a - average of 62 UK cities

b - index based on numbers in the city centre compared to a pre-lockdown baseline of 100. Data represent first weekend in July, save for workers index, based on the previous working Friday – for methodology see ref. 29

These data suggest a slow recovery and return of confidence, although the trend is positive: in May the indices were much lower for each city. They also suggest weekend visitors are returning far quicker than workers, many of whom were still furloughed when data were collected, or evening visitors.

Detailed data show that workers and visitors from outside the cities are slowly venturing back into the centre as businesses re-open, although not yet back to pre-lockdown numbers (for latest data see Centre for Cities' recovery tracker at ref. 29). The end of the summer holidays saw the Government launch a campaign to encourage workers to return to offices – in part to support city-centre service businesses - which was reversed as infection rates increased in late September. There is already some evidence that office rents are falling, and vacant buildings are harder to let. That may in turn lead to a fall in land values. However, it would be premature to suggest quite how the change in working practices we are seeing will translate into reduced demand and lower building rates.

There are also reports of an 'exodus of the middle classes' from city properties, notably in London. This may suggest that those who can afford to do so are re-locating to out-of-city locations. If that is sustained, it may well change the demographic and social make-up of cities. However, this may predominantly be an issue for the Capital, which seems likely to have a relatively modest impact on overall city centre populations in the central South, particularly if student numbers continue to grow - perhaps a big 'if'!

As we complete this report it's too early to assess the long-term impact of these changes, although we do discuss whether recent experiences will drive behavioural change in Chapter 8. What is clear is that many businesses, be they retail, leisure or occupiers of commercial space in our city centres will only survive in a very different form from their pre-Covid selves, if at all.

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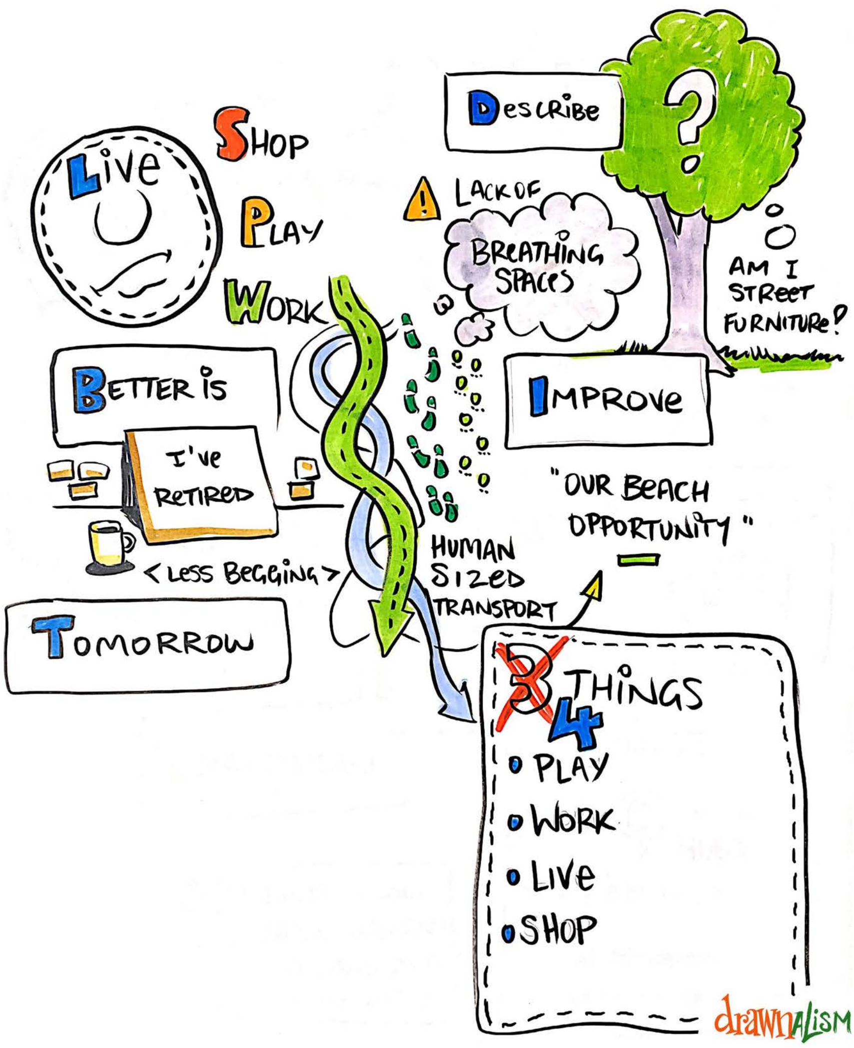

Chapter 4: People's views

At the heart of our study lie the views of local people about their city centre. We gathered a broad range of views on the future of those places, including through discussions with local communities in Southampton and Portsmouth, and with young people in BCP. Separate summaries of those discussions can be found on the city centre pages of SPC's website. The observations and ideas we draw from those discussions are reflected in this report.

We also conducted a survey, inviting responses from the central South's residents. We asked what use they made of the region's city centres, what they liked and disliked about those places and how they would like to see them change. We received 120 responses, 92% of whom were from people living locally.

There was a preponderance of men responding, 58% of responses came from men, 39% from women (the rest preferred not to give their gender). The modal age of respondents was 45-65, and there were responses from residents of each of the places we looked at. The full results can be seen at the city centre pages of SPC's website.

With a modest response to the survey (it was conducted during the later months of lockdown, which may have affected the response) we have not carried out a detailed analysis of comments city by city, and any question which received fewer than 80 responses was not included in our analysis (save where participants were offered the opportunity to make a written comment). Once again, the views expressed through the survey have been incorporated into our analysis and discussion. We haven't distinguished here between cities in summarising the responses, which were generally consistent across each location, unless otherwise mentioned.

For questions on their likes and dislikes, and on looking ahead respondents could offer more than one answer, which is reflected in the percentages for responses given below. They also had the opportunity to make a written comment. A short summary of responses is below.

People and their habits:

- 72% of people were most likely to visit their nearest city centre, with 19% being resident there
- Only 13% of respondents described themselves as 'rarely or never' visiting the city centre, six out of 10 visited at least once a week
- Around half of respondents' main reason for visiting was to shop, with one in five visiting to work and just under one in 10 primarily going to visit leisure or cultural facilities, to meet friends or for an evening out

Likes and dislikes:

- Respondents considered the best aspects of our city centres to be *"they're a great place to meet people" (47%), "it's a nice place to visit"* (42%) and *"it feels safe"* (39%). Other comments included: *"I like the green spaces... and outside spaces", "shops that are not part of a chain", "vibrant cafes, pubs and restaurants", "outdoor markets, the Farmers' market is brilliant"* and *"it's the history and architecture"*
- When asked what they disliked about the city centre the commonest responses were *"there's too much traffic"* (53%), *"it's too dirty or noisy"* (28%) and *"it's not an attractive place"* (24%). Other comments included: *"it's bland", there aren't many interesting shops", "too many generic chain shops", "too difficult and costly to park"* and *"not enough independent shops"*

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The modal age of respondents was 45-65, and there were responses from residents of each of the places we looked at.

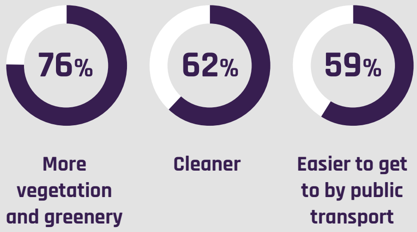
Chapter 4: People's views (continued)

Looking 20 years ahead:

- People saw tomorrow's city centre as fulfilling many roles: a place to meet friends (91%), to go for arts and culture (83%), for an evening out (78%), to live (75%), to shop (70%) and to work (67%). Comments included: *"a place to experience"*, *"a place to learn, to make and to repair and regenerate (to combat climate change)"* and, more sceptically, one respondent saw Winchester as becoming *"a tourist attraction with nothing for locals"*
- Participants felt a number of things need to change over the next 20 years: more attractive public space (76%), a cleaner environment (67%) and more arts and cultural venues (52%). Only a minority expected to see more shops (19%) or more leisure facilities (27%). Comments identified the need for: *"a new attitude to cars"*, *"greener"*, *"modern facilities"*, *"a cultural centre"* and *"leisure activities to attract the young"*
- There were some clear messages about the improvements people wanted to see in the centre: more vegetation and greenery (76%), it should be cleaner (62%) and easier to get to by public transport (59%). Comments included: *"housing where there used to be housing"*, *"a better offering of shops so we don't have to go elsewhere* (a Winchester respondent), *"streets improved for pedestrians"*, *"it should be better maintained"* and *"less pollution"*
- When asked what will be the most important feature of tomorrow's city centre comments included: *"a place where everyone feels comfortable and welcome to live, work, study, shop and socialise"*, *"better, more innovative architecture that includes green spaces"*, *"have genuine individuality so that local people and businesses feel invested in their city"* and *"attractive outdoor environments for when the weather is good and attractive and inexpensive indoor cultural attractions for when the weather is bad"*

Responsibility

- People thought that it was down to local organisations to improve the city centre: the local council (99%), local businesses (69%) and local people (69%). A large minority (44%) thought there was a case for central Government intervention. Comments reflected the importance of working together: *"above should all work together"*, *"there should be a role for local residents"* and *"a much stronger collaboration and effort by everyone interested in both preserving the best, improving the city centre and those using and enjoying each and every facility in the city of their choice"*
- When asked who should pay 72% of respondents said they'd be willing to pay more national or local taxes to fund improvements to the city centre



There were some clear messages about the improvements people wanted to see in the centre: more vegetation and greenery (**76%**), it should be cleaner (**62%**) and easier to get to by public transport (**59%**).

Bournemouth Lower Gardens

Chapter 5: The changing role of the city centre

Many of our participants argued for radical change in how we see our city centres, as one put it *"Our old models* [for city centres] *are broken, so don't emulate them. Find what the new ones are"*. Those models may be broken for a number of reasons. This chapter and the next look at what our participants think is breaking, or at least changing, in our city centres.

This chapter begins by examining how participants saw the different roles of the city centre changing and evolving over the next 20 years.

i) A place to…shop

When commentators talk of the "Death of the High Street" it generally precedes some observations about rising internet sales, soaring High Street rents or declining footfall. Whilst all of those trends are happening, we did not find the same fatalism amongst those we spoke to.

The local resident participating in one of our events who said *"shopping is part of a day in town"* spoke for many in seeing a continued role for retail in the city centre. But local people also wanted change, they did not like the predominance of chains and wanted to see more independent, distinctive shops which helped create a more individual character for the city centre. Markets or 'pop-up' retail should be part of the offer.

Many found the current city centre retail offer unexciting, one described most shops as "*functional*", saying "*there's one or two shops I'd go to, but not much else*". Others bemoaned the loss of certain shops – "*the stores you want to visit are no longer there*", recognising that on-line shopping may have contributed to their closure.

Young people we spoke to, those under 20, shopped less. When they did, they worried about cost and sustainability – indeed this generation felt strongly about the social and ethical approach of business. For that reason, they liked charity and thrift stores. They were also the strongest voice asking for a more diverse retail offer: *"why do we need four vape shops all in one street, why can't someone plan these things better?"*.

The retail businesses who contributed to this study told us their model was changing. Larger stores and chains are 'consolidating' in fewer key locations. They are also trying to develop a more personalised and bespoke offer, to accommodate rather than battle against the internet and play to their strengths.

This ranged from the in-store 'experiences' some offer through to larger stores having smaller franchises – coffee shops, for example – inside.

Independents saw the opportunity to be part of a fresh identity for the city centre: *"let the big companies have the internet, we can carve out a new role"* said one small business owner. Whilst not all want to set aside on-line sales, there was a consensus that smaller, distinctive shops were central to making a place attractive and interesting. They could also offer a more personalised service and 'add value' for customers.

Of course, all retailers were concerned about the costs they face, both rent and business rates. They recognised that such problems needed national solutions, but urged local councils to take the initiative by making city centre property they owned available on reasonable terms. And local residents recognised that if independent shops are to survive they must shop there, there is no use bemoaning the lack of distinctive shops and then buying on-line.

One clear trend was for making more flexible use of space – with former large retail spaces being re-purposed for a mix of retail, business and leisure use, from gyms to restaurants/bars and flexible workspace. The re-development of the former Knight & Lee Department store in Southsea by the THAT Group is a good example, as is the conversion of part of the Marlands Centre in Southampton for flexible workspace.

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ii) A place to...live

"We must have people living in the city centre" said one participant in our Southampton event. That echoes the view of many, who insisted you need people to make a place attractive and vibrant. Visitors of course helped, but without a resident community the city centre *"looks like a business park, it has no life"*.

Whilst all our city centres now host purpose-built flats – which many regarded as aimed at the buy-to-let market – and bespoke student accommodation, this was not enough for many participants. Indeed, a number felt these newer city centre developments only deterred *"ordinary people"* from living in the centre.

What participants argued for was a mix of homes in the city centre, for people of all ages, in all family circumstances and on all budgets. They did not want development *"only for the wealthy"*, but a mix of flats and houses which allowed people of all ages and backgrounds to mix – they wanted a community.

City centre housing must be well designed, with plenty of green space, places to play and facilities such as coffee shops, corner stores and gyms – everything to ensure it was a *"place people want to live, rather than simply being sent there"*. New models of housing are developing – from co-living to flexible living spaces – which could be the best answer to the needs of city centre communities.

Others, particularly young people, voiced a strong sustainability argument for city centre living. They believed behaviour is changing, with people wanting to travel less to reduce car use and achieve a better work/life balance. As one participant said, *"you can live sustainably when everything is nearby"*. Several referred to the idea of the '15 minute city': the notion that all people's day-to-day needs can be met within the immediate locality.[30]

With fewer jobs being necessarily location-based and technology enabling greater flexibility, the role of city centres as business hubs is changing.

Others made a positive case for living amongst shops, bars, restaurants, clubs and galleries: *"city centres are exciting places to live"* said one participant, who then pointed out they were *"over 50, and still like a night out"*. Participants felt there was a real opportunity for councils and developers to make city centre living an affordable and attractive option for a wide range of people.

iii) A place to...work

City centres have traditionally been seen as a good place to do business: a central location is better for staff and customers, and helps businesses feel connected. Those businesses also provided customers for cafés, coffee shops and sandwich bars, making for a closely knit and inter-dependent business community.

There are, of course barriers, notably rush-hour congestion and costs, both of which have driven some to out-of-town locations. The structure and rigidity of leases often discouraged independent and start-up businesses, and hampered growth. Some businesses also felt they were not welcome in the centre, with a lack of good quality office space, conversion of what space there was to residential uses and a worry that 'messy' businesses – those that might be noisy, for example – are *"driven out by nimbys"*.

The picture is also being disrupted by rapid and dramatic changes in working practices – be that more flexible working or the wish of many to work at home, a trend recent events have encouraged. With fewer jobs being necessarily location-based and technology enabling greater flexibility, the role of city centres as business hubs is changing.

That said, many businesses still see the city centre as an important place to be, particularly those dependent on a local market. City centre managers also welcome a diversity of businesses having a presence in the centre, maintaining that sense of a *"business community"*. But there is a growing demand for more flexible space which allow people to 'drop-in' to work or meet colleagues for just a few hours. Companies are increasingly designing their own space that way, and more bespoke flexible space is opening for smaller businesses and start-ups to rent spaces in – for example the Barclay's Network Eagle Lab in Southampton. Increasingly such facilities are part of mixed-use retail/work/leisure schemes in city centres.

Local people were also very supportive of business, one Portsmouth resident saying "*we are an entrepreneurial city, we need space for small business in the centre"*. That ranged from a desire to see independent retail and food with an offer not available on-line, to locally produced goods characteristic of the place.

iv) A place to…play

City centres have always been gathering places for people; for markets, celebrating festivals and events or simply meeting friends. That informal role remains important today, indeed the Covid-19 lockdown has shown us just how important social contact is. Parks, public gardens and town squares have long provided space for that.

They are also where many spend their leisure time: home to cinemas, theatres, bars, clubs, restaurants, museums and galleries – the centre provides the critical mass of customers to support a wide range of facilities. They are where you can see buskers or a whole range of street performers.

Most towns and cities encourage a wide range of cultural activity because it attracts visitors to their place, but also for the way it helps create a distinctive identity and sense of vibrancy. The idea of 'culture-led regeneration' – building physical space, theatres or galleries to catalyse renewal – has been at the heart of major programmes in many places, for example the Sage in Gateshead or Turner Contemporary in Margate.[31]

Participants in our study all felt 'culture' – however that may be defined – *"must be seen as part of place, of the unique character of a city"*. One described *"the leisure boom that is fuelling city centre growth"*. That means space has to be found for a range of activities, not just buildings for theatres or gyms but the public spaces where other less formal activities can take place.

City centre events – from markets to street entertainment, micro-festivals and performances – were also popular, provided they were "*high quality*". Spaces like the Guildhall Square in Portsmouth and some of the city centre parks were seen as great places which made a visit to the centre more exciting, and which could host more of those events, as well as providing play space and opportunities to "*chill-out*".

Events and activity were an important part of bringing the city centre to life after shops and offices had closed. At the moment, many felt, there was no reason to come into the centre at that time, indeed it could even feel unsafe.

Many people, and particularly young people, were passionate about the importance of open and unrestricted public spaces. They didn't want to have to pay to spend their leisure time in the city centre, they just wanted to meet friends and 'hang out' without *"being disapproved of"*.

There was the same recognition that in future space should be flexible, with cultural or leisure space being part of mixed-use developments, and with cultural venues – museums, for example – offering retail or a place to eat alongside exhibition space. There are many examples today of the imaginative use of vacant retail units for exhibitions – even a fish and chip shop used as a pop-up theatre.[32] We should expect to see more multi-purpose space, indoors or outdoors.

Most towns and cities encourage a wide range of cultural activity because it attracts visitors to their place, but also for the way it helps create a distinctive identity and sense of vibrancy.


The Festival of Light, Southampton

Chapter 6: What is driving change in our city centres?

In addition to the changing roles of the city centre summarised in chapter 5 our research also suggested that participants saw several other trends which reflect wider changes in our society and will be important in shaping tomorrow's city centre.

i) Digital technology

Technology is a disruptor in so many fields, from health to arts and entertainment. It gives rise to new ways of delivering products, of working or of connecting and collaborating. It has the potential to make radical changes to the way city centres work and the role they play in our lives, many of them touched on elsewhere in this report.

Participants talked about the impact of digital technology on the retail economy. It is driving sales away from shops and on-line, whilst also helping increase price competition – as a young person from Bournemouth put it, *"why would I go to a shop when it's cheaper and easier on my phone?"*. The same technology and our ability to communicate digitally is also driving new working practices which are changing our understanding of work and where we do it.

Technology is also responsible for shaping how we spend our leisure time, providing an alternative to cinemas, theatres or live music venues, and even allowing us to view the contents of galleries and museums on-line rather than in person.

The received wisdom is that technology is driving city centre decline: reducing footfall and in-store spend, keeping workers at home and harming traditional live entertainment – notwithstanding the rise in cinema attendances recorded in chapter 3. But there is a more positive story we picked up from many participants about the opportunities technology is opening up.

We heard examples of how technology can be used by businesses to create a new shop window and new avenues for marketing. Similarly, many participants spoke about how it can be used to promote what the city centre offers and draw people in by, for example, providing information on transport or parking, as well as promoting events.

City managers across the world are exploring a much broader use of technology to build 'smart cities': places which are using "*new technology and data as the means to solve the city's economic, social and environmental challenges*"[33]. The idea of smart cities is not easily defined, and there are many models. But they share the aim of using technology and making intelligent use of data to improve their place and the life of the people who live, work or visit.

ii) How we use space

Driven in part by the changes wrought by technology we are using space - the shops, offices and public spaces - in our city centres in new, imaginative ways.

Traditional shop-based retail seems likely to continue its decline, with more consumer spend being made on-line. As retailers respond by exploring new retail models, the role for city centre retail units will change. We'll see more initiatives such as the John Lewis 'experience' offer or the new style Apple and Nike stores designed to promote brand as much as sell. Shop units may no longer be the direct income generators they once were, and fewer may be needed.

This opens up the potential for other uses of that space – whether by smaller, distinctive independent businesses or for entirely different roles. All of our city centres have seen retail units used for short term 'pop-up' activities, from artists and performers through to exhibitions. Shops are being converted to gyms – one of the few types of retail to experience a growth in outlets. Some are being converted to or replaced with housing. If the reduction in retail does continue to drive down rents, then that may also help open up the potential for other uses.

At the same time, the space requirements of other non-retail businesses are changing as working practices evolve. Established businesses are moving to more flexible, less location-based modes of working, and new start-ups will often avoid getting tied down to expensive space when they can. For many, cafés or business hubs are becoming the new 'office' – as one participant said "*cafés can be a nice quiet environment in which to do business*".

Just as we should look at office and retail space differently, so the role of outdoor space – the public realm - is changing. Once just a way of getting from A to B, the space between buildings is now an integral part of urban design, and it fulfils many purposes. It may be space for performance, for kids to play (or even, to the chagrin of some, skateboard) or simply a place to gather and meet friends.

Driven in part by the changes wrought by technology we are using space - the shops, offices and public spaces - in our city centres in new, imaginative ways.

Participants particularly valued parks and green space, for the activities they offered or the events they host. As one Southampton resident put it, *"the Parks are a real treasure, they make you happy to visit the city centre"*. For many, they are a quiet space at the heart of the city where they could meet friends, or simply sit quietly.

iii) A better environment, a sustainable place

One of the topics regularly raised by our participants was the quality of the local environment in our city centres. They were worried about litter, graffiti and, perhaps most of all, noise and pollution from traffic.

Many also spoke about the visual impact of poor quality buildings and run-down public spaces – *"it's hardly a place to be proud of"* (this participant was speaking about Mayflower Park in Southampton, but others gave similar examples elsewhere). Words like *"polluted"*, *"congested"*, *"scruffy"* and *"ugly"* were used in criticising the appearance of the city centres we looked at. One participant suggested their centre had "*lost its sense of vibrancy*", another that it was "*tired*". There was a suggestion that *"the council need to give the place a makeover"*.

At the same time, they were often proud of what they felt were the better kept parts of their city centre – parks, squares. This included some of the more attractive or iconic buildings, from Winchester Cathedral to the Spinnaker Tower in Portsmouth. There was a strong desire to see historic buildings restored and protected – *"they're part of our story"*.

The natural environment was also important. Participants wanted to see trees and wildlife – green space – in the heart of cities. In part this was aesthetic, it made the place look nicer, as long as it was well managed and maintained. But many saw it as central to the character of the place as well, not just the obvious spaces such as the Cathedral Grounds in Winchester or Lower Gardens in Bournemouth, but the roadside trees, small patches of greenery or the rivers running through the city centre.

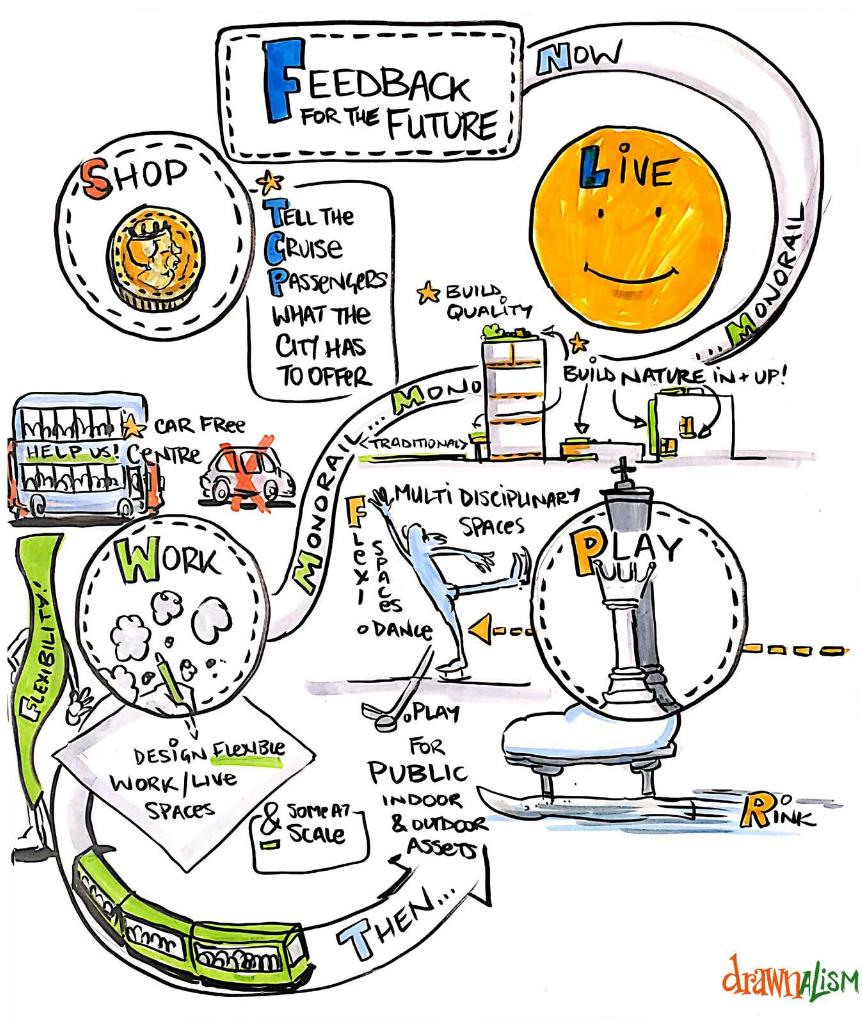
Keeping places clean and attractive was widely felt to be an important part of creating a sense of pride in the city and its centre. But the worries raised with us about the quality of the local environment also reflect the wider discussion in society today about the environment and pollution. Global challenges such as climate change or the loss of flora and fauna were often part of the discussion about what could and should improve locally.

There was a strong desire to see the city centre as a *"sustainable"* place. People meant many things by that, but what came across was a desire to see city centres which were less polluted, sought to reduce carbon emissions, took more care in the use of renewable materials and gave space to nature. As one participant put it, *"they must be responsible places"*.

iv) Safety, health & wellbeing

The impact of our city centres on health and wellbeing – both physical and mental health – was also raised by a number of our participants. There was concern that traffic and pollution made the centre: *"an unpleasant place to visit, goodness knows what it must be like to live there"*. Several participants mentioned how important green space was for our mental wellbeing.

Like the term 'sustainable', the notion of a 'healthy city' means different things to different individuals, but there was a shared understanding of the importance of many aspects of urban life – from housing through pollution to poverty or a greener urban environment - to individuals' wellbeing.



There is a national discussion about what constitutes a "healthy place" – see, for example, The King's Fund review of NHS England's healthy towns programme[34]. It was clear our participants place a high value on seeing the city centre as such a place.

The same was true of a sense of being safe in the city centre. It was particularly noticeable how some of the young people we spoke to felt unsafe in parts of their city centres, mentioning in particular on-street drug dealing and intimidation from aggressive begging. Another (adult) participant mentioned how aggressive begging was the most significant factor deterring some visitors to their centre, others mentioned it felt *"threatening"*.

v) Places for people

City centres are economic hubs, places for retail, business and entertainment, but they are also important as gathering places. The importance of people, of city centre communities, came across regularly in our discussions. Our participants placed great store on the city centre being open and accessible to all – note, for example, the comment recorded in 5(ii) that participants didn't want housing that was *"only for the wealthy"*. Another participant warned us *"don't gentrify the city centre"*.

Many stressed the importance of finding constructive solutions to the social challenges which are visible in the city centre: homelessness, drugs or poverty, for example. They wanted diverse communities, with young and old, and those of different ethnic backgrounds all mixing. One city centre resident spoke of their community being a *"real melting pot, and I don't want to lose that"*. That reflects a wider fear that 'regeneration' might involve some being driven away, and a *"privatisation of public space"*.

There was a strong desire amongst local residents who participated to be involved in discussions about the future of the city centre, for example the master-planning or visioning exercises underway in several of the cities we looked at.

There was a strong desire amongst local residents who participated to be involved in discussions about the future of the city centre, for example the master-planning or visioning exercises underway in several of the cities we looked at. That went beyond the occasional public meeting to a plea for participation in all stages of the thinking and planning: Portsmouth City Council's consultation on the future of the Cascades and Commercial Road was mentioned as an example of how to keep people involved throughout the process.

In 6(iii) we record that people wanted to see their city centres as environmentally *"responsible places"*. It's also true to say that our participants wanted them to be socially responsible, judged by a sense of openness, inclusivity and fairness. There was strong support for 'ethical' businesses, for example following fair-trade principles or social enterprises who directly supported local employment or investment in the community.

Chapter 7: What do people want from their city centres?

Perhaps the most important perspective on tomorrow's city centre is that of local people, those who live, work, shop or play there. Our discussions with people in Southampton and Portsmouth, and with young people in BCP, showed a real sense of pride in their cities, and a desire to make the centre of those cities a better, more attractive place. Their views on what that should look like can be distilled into six broad principles. In essence, people wanted city centres that are:

i. **Distinctive**: all our participants wanted city centres that tell the story of the place. They should reflect their history, and tell the story of the wider city. No one wants a bland, characterless city centre, they want a place that allows visitors and residents to recognise the uniqueness of the place they are in. This is not simply a plea to avoid a 'clone' High Street, but reflects a desire for a distinct identity and, for many, *"somewhere to be proud of"* which, as one participant put it, "*celebrates our quirkiness*". Importantly, we should not attempt to make the place something it isn't: as one participant said, *"build on what you have, not what you want"*.

ii. **Diverse:** there was a strong desire to see a centre that is diverse: it welcomes all – young or old, rich or poor - and is home to a wide variety of people. To be open to all requires a variety of housing, a broad range of job opportunities, a mix of retail and a varied leisure and cultural offer. That diversity is part of the attraction of the city centre. As one participant put it, *"we must manage the city centre to create more diversity, with something for everyone"*.

iii. **Accessible:** a number of participants found the city centre surprisingly hard to get to, either because of congestion or inadequate and poorly connected public transport. If it is to be open to all to shop, live, work or play the centre must be reachable by affordable, integrated public transport. It must also be easy and safe to move around, well designed and, in the view of most, it should prioritise pedestrians. Generally people preferred public transport to the private car, and forms of transport which were environmentally friendly – one participant calling for *"electric golf buggies"* to be made available to visitors to the centre (that same city is now trialling electric scooters)!

iv. **Enjoyable:** one participant captured the views of many, saying "[the city centre should be an] *interesting place you don't just need to visit, you <u>want</u> to"*, with "*a reason to go there*". Others spoke of the city centre *"experience"*: the city centre has the critical mass to provide an attractive mix of leisure, culture and retail, alongside well design spaces which highlight the local heritage, and streets enlivened by performers and musicians. In the words of one local business "*the city centre needs to encourage encounters and create memories"*.

v. **Affordable:** one thing which must be avoided is excluding people from the city centre because it is unaffordable: expensive retail or housing, paid for activities or high costs of access. Young people, in particular, were adamant that the city centre should be affordable: there was *"stuff we can do for free"* and *"places we can hang out without paying for expensive coffee"*. The idea of an affordable place also chimes with notions of fairness – a place that proactively addresses social disparities, not sweeps them under the carpet.

vi. **Green:** there was a very sophisticated understanding of the importance of the natural environment in city centres: to help tackle pollution, improve wellbeing or simply make the place more attractive. That is coupled with a commitment to sustainability – efficient use of materials or energy, and minimisation of waste. People wanted more than just a few compromises, and certainly didn't want "*greenwashing*". If the economy is to remain at the heart of the city it must be a 'green economy', promoting not only prosperity but also fairness and environmental awareness.

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If it is to be open to all to shop, live, work or play the centre must be reachable by affordable, integrated public transport. It must also be easy and safe to move around, well designed and, in the view of most, it should prioritise pedestrians.

Chapter 8: City centres and the 'new normal'

The lockdown which began on 23 March to help us protect communities from the Covid-19 virus has changed many aspects of our behaviour, from how we work or shop to the way in which we interact with our fellow human beings. As we plan for social and economic 'recovery', there is a debate about whether we will see a 'new normal': different ways of behaving which will shape a different future.

Other, non-retail business has seen an equal shift in behaviours, with people encouraged to work from home and discouraged from travel. Many city centre offices have been empty, with staff furloughed and the Government paying 80% of their salary. As with retail, lockdown has accelerated trends we were already seeing – home working, more flexible use of office space – and encouraged companies to explore new operating models.

Many of the trends affecting city centres which our research has recorded have been brought to prominence and accelerated by lockdown, from the sharp rise in internet sales to plummeting footfall. They will change the make-up of the city centre. Shops have shut, and retail analysts argue many will not re-open. The Chief Executive of Unilever has suggested that there will be "lasting change" in our shopping habits, with certain products in demand, and others less popular.[35]

There may also be changes in consumer behaviour as they return to shops. A survey by PwC[36] conducted in late May identified:

"...a trend towards local and ethical shopping as a result of prolonged lockdown. With many larger stores and chains closed, and continued social distancing for the foreseeable future, more consumers are looking to support local independent retailers who have helped them through these times. This is especially visible in the results of consumers who indicate they will support stores and brands that look after their staff, or have supported the NHS and the vulnerable"

Theatres, cinemas and venues for live music are also closed, with no sign of re-opening yet on the horizon. Some have already gone into Administration – notably the NST City theatre in Southampton, which opened its city centre venue as recently as 2018 after many years of planning. Pubs and restaurants look likely to be very hard hit as ongoing restrictions harm their ability to survive months of full or partial closure. Any place where people gather will be very different for months to come.

We have seen innovation by some businesses, quickly developing new business models: the restaurants who have embraced home delivery, or the performing arts venues offering on-line 'shows'. Some of these are temporary measures, others may open up new opportunities. However they evolve, lockdown has not only accelerated the change we were already seeing in the face of the city centre, it has encouraged new thinking.

"...a trend towards local and ethical shopping as a result of prolonged lockdown. With many larger stores and chains closed, and continued social distancing for the foreseeable future, more consumers are looking to support local ndependent retailers who have helped them through these times. This is especially visible in the results of consumers who indicate they will support stores and brands that look after their staff, or have supported the NHS and the vulnerable"

Chapter 8: City centres and the 'new normal' (continued)

But recent months may well change more than business models or working patterns. They may have given us a new perspective on what we as a society value. Mark Carney, former Governor of the Bank of England, wrote, in April 2020:

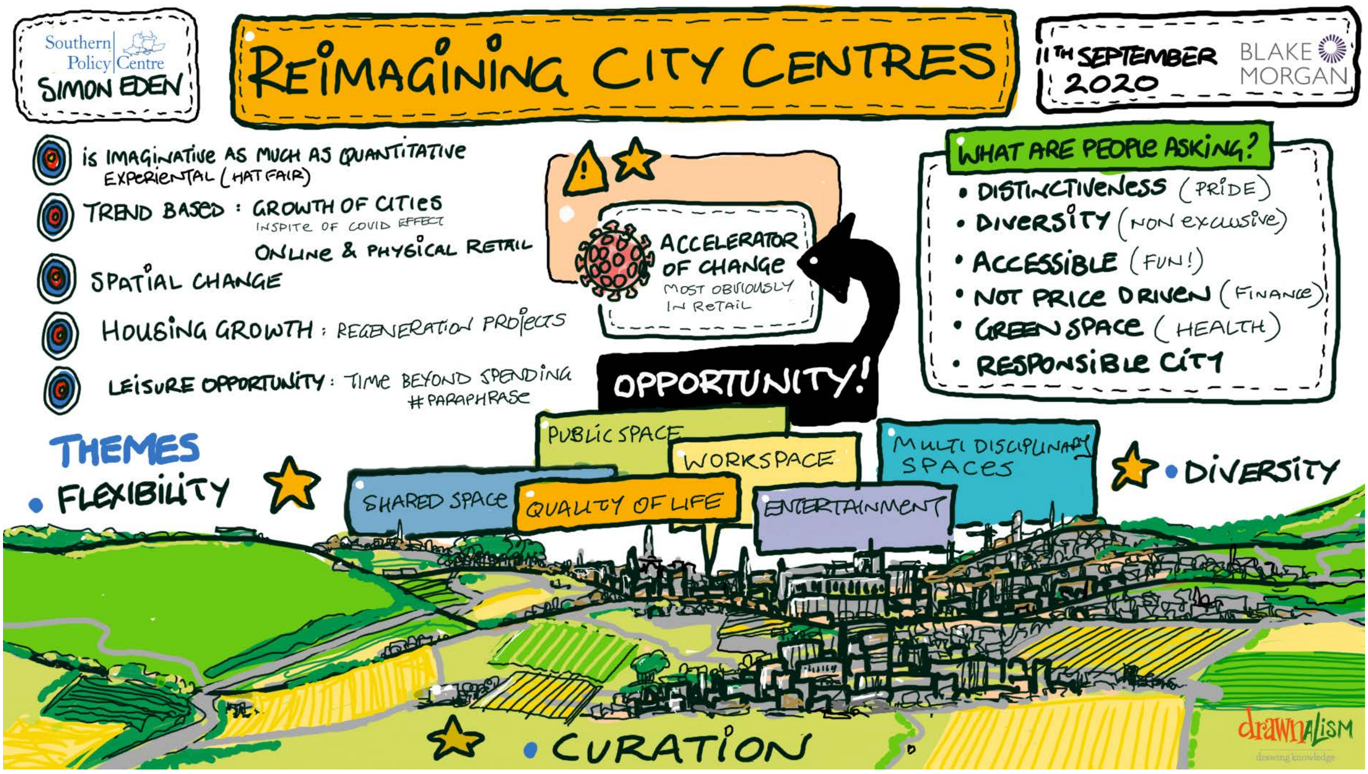
"Value will change in the post-covid world. On one level, that's obvious: valuations in global financial markets have imploded, with many suffering their sharpest declines in decades. More fundamentally, the traditional drivers of value have been shaken, new ones will gain prominence, and there's a possibility that the gulf between what markets value and what people value will close."[37]

Carney's contention is supported by a recent poll suggesting that the majority of UK citizens want the Government to prioritise health and wellbeing over the economy - 61% of those polled by YouGov in early May 2020 said that the government should focus on improved social and environmental outcomes (such as life expectancy, education, and lower carbon emissions) over economic growth as the country moves out of lockdown.[38]

Others are arguing that we should be giving greater value to the natural environment in the future[39]. The benefits of the natural environment for our mental wellbeing, the reduction in pollution from lower vehicle use or the drop in CO^2 levels are all cited as lessons we should learn from lockdown. The arguments for a fresh approach to nature and the environment chime with views expressed by many of our participants (see chapter 6 (iii) and (iv)).

Some commentators have seen lockdown as presaging the 'death of the city', with people no longer willing to visit urban centres to shop, work or play, and those who live there seeking to move to more suburban or rural areas.[40] They argue that practices such as home-working or on-line shopping will diminish the social and commercial interactions which are key to thriving city centres. Others believe the disruption caused has given us "a chance to be bolder and braver, invest in ideas and test them".

Prior to the Covid-19 crisis there was an appetite for change, for a fresh look at what we value, how we work and socialise. Our experiences after 23 March 2020 may well have reinforced that, although it remains to be seen how many of the new shopping, working and travel behaviours will be sustained, and to what degree. But recent events have certainly provided a pause for thought and an opportunity to re-think our city centres.



Chapter 9: What will it take to be a successful city centre in the future?

Notwithstanding current upheavals our city centres will continue to have an important role to play in our economy and communities. But that cannot simply be more of the same. There is little to be gained from propping up current models when there are significant factors driving change. Rather, we need to understand what will shape that future, and how we can create places that meet expectations and aspirations from across the community.

Our research suggests that the successful city centres of tomorrow will:

i. Be adaptable

Most cities grew up around one or two key functions: Southampton and Portsmouth around their ports and docks, Bournemouth and Poole as visitor destinations and Winchester as a county market town and centre for religion and government.

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"Successful city centres will be those that adapt."

Today they are more diverse and play many roles in people's lives. They are what the Institute of Place Management term 'multi-functional', and are all a focus for a wide range of economic, social, cultural and leisure activities – albeit Winchester also has a strong visitor/heritage, or 'speciality', offer.[41] That reflects their evolution into complex but coherent places where people live, work and play as well as shop. That evolution has not come from a determination to follow a plan or blueprint, rather it has been a more dynamic response to a wide range of social and economic changes.

The key for tomorrow's city centre is to retain that ability to respond to changes in society, as one participant put it *"successful city centres will be those that adapt"*. Another relevant quote, often used in management textbooks (where it is misattributed to Charles Darwin) suggests that *"it's not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change"* [42]. It's intended as a paraphrase of Darwin's theory of evolution by natural selection, and very eloquently makes a point about the importance of adaptability.

Several recent studies have suggested that changes in retail offer a positive opportunity for change, and to address other pressing problems. The Social Market Foundation, for example, has suggested vacant retail premises, unlikely to be re-used as shops, could be 're-purposed' as housing[43] – although experience has suggested such conversions do not always work well. However, the point is that change in today's city centre creates opportunities for tomorrow's.

ii. Add value

The city centre offer needs to be different. People can do their daily shopping on-line, in shops in a district centre (Woolston in Southampton or Fratton in Portsmouth, for example) or in out-of-centre supermarkets. They can buy much else on-line, go to see a film at an out-of-town 'cineplex', stream a band's music or go to work in a business park off the motorway. Whilst some of this will change, today's city centre has to compete, and that will no doubt remain true tomorrow.

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The centre has the advantage of size, with a critical mass of residents and visitors to support that mixed economy.

So the city centre must offer something more, something distinctive. That may be retailers not to be found elsewhere – whether larger chains or distinct local businesses. It may be unique restaurants or live music venues. More likely it will be a package, a distinctive mix of retail, leisure and workspace. As our survey suggested, people want to see a multi-functional city centre (see chapter 4). The centre has the advantage of size, with a critical mass of residents and visitors to support that mixed economy. And it can offer that distinct 'live' experience, whether of performance, encounter or just place that cannot be found on-line.

Whatever it looks like, that distinctive mix cannot simply be manufactured afresh. It must come from what the city already has to offer, its history and its strengths. As one participant put it, *"we must build on what we have, not what we want"*. That will include the place's history, its creative strengths and the successful sectors of the local economy.

For its residential community the city centre is in competition with suburbs – houses often with gardens and driveways. It needs to offer something more than just a collection of houses and flats (more likely the latter) sandwiched in between shops and offices. A vibrant and lively city centre is a good start, but that must come with green space and a range of facilities.

Our participants spoke about the polycentric nature of the central South's cities, with diverse and vibrant district centres complementing the centre. Several stressed that, whilst the centre must be distinctive and different, it should fit with other parts of the city and its wider hinterland, with a complementary offer – whether retail, food or leisure. One suggested the city was *"like a jigsaw"*, with the centre being just one part which could not function in isolation, but was essential to complete the picture.

iii. Focus on people...

From their earliest days cities were really no more than a concentration of people drawn together for mutual advantage. People, their skills and their knowledge, remain at the heart of the city, the concentration of people is their unique selling point, their pathway to success: as economist Edward Glaeser puts it "Cities depend on human capital to thrive, cities must attract smart people and enable them to work collaboratively".[44]

Others see an important role for cities as 'melting pots', places which "attract and throw together people of different ethnicities and backgrounds, varying trades and occupations, disparate classes and attitudes".[45] For them, the loss of footfall as retail, work or leisure changes will mean that people no longer have the chance to meet and mix, to interact in ways which can spark all sorts of business, social or cultural innovation and creativity.

To flourish in the future, our cities must ensure they can continue to attract and retain a diversity of talented people, allowing them to "draw fully on the talents and creativity of their own residents"[46]. What the city centre offers as a place to shop, live, work or play underpins a city's reputation and identity, and so is an essential component of the places' attractiveness to people.

Once we acknowledge city centres are first and foremost places for people, we should shape them with those people in mind. Planning for the future of the city centre should not be akin to a game of Sim City where one builds a property empire, but about creating a place people want to visit. Our participants observed that "*we are a sociable species*" and "*we need opportunities to meet up*" – indeed one of the great loses of lockdown has been the restriction of our chance to meet. The centre should provide that opportunity.

iv. ...and focus on skills

The Centre for Cities has emphasised that successful city centres cannot simply be defined by their High Street offer. Rather, they consider the strongest determinant of success is the number of high skill jobs.[47] Its research suggests that the most economically successful city centres are those with a high proportion of skilled jobs, and where the amount of commercial floor space devoted to office far outweighs that devoted to retail.

They go on to argue that a high proportion of skilled workers improves the quality and success of retail outlets and diversifies the city centre offer, with more food and leisure services on the high street. The economist Richard Florida has long argued, to some controversially, that the success of a city is driven by its 'Creative Classes'.[48]

Attracting and retaining skilled people requires, inter alia, an investment in workspace for high skilled, high value business, along the lines we already see in the central South. That may no longer be the traditional office, instead it may look like flexible workspace such as that offered by the Barclays Network Eagle Labs in Bournemouth and Southampton.[49] But it also means cities must invest in skills, working with their schools, FE colleges and Universities – and seek to attract and retain skilled people.[50]

v. Embrace digital

Creative use of data can help guide the ongoing development of city centres. At the simplest level, for example, data on footfall or traffic flow guides management of highways and public spaces. However, more complex analysis of the wealth of open data available can provide fresh insights. Research published by the Centre for Cities and quoted in Chapter 3 part (vii), for example, use data on mobile phone usage to plot how and when people are returning to city centres post-Covid.

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> **Planning for the future of the city centre should not be akin to a game of Sim City where one builds a property empire, but about creating a place people want to visit.**

Other places are using data to inform and assist users of the city centre: apps which give details of bus timetables and locations, or store locators, for example.[51] We have long seen apps that allow visitors to find and pay for car parking space, and digital display signs carrying a variety of information about traffic and events.

Notwithstanding these examples, using data to guide management and decision-making is in its infancy. The Institute of Place Management's *Bringing Big Data to Small Users* project signposts a way forward, aiming to help policy makers, businesses and local partnerships to use data to make informed decisions about town and city centre management.[52]

vi. Be creative, be brave

Our study has found many fresh ideas about the city centre, whether from local people, businesses, the cultural community or by looking at what is currently happening in the central South and elsewhere. Several of our participants argued that city administrations, or indeed other organisations who shape the city centre, are not always willing to try out new ideas. Rather, they are risk averse, usually because any failure quickly attracts opprobrium.

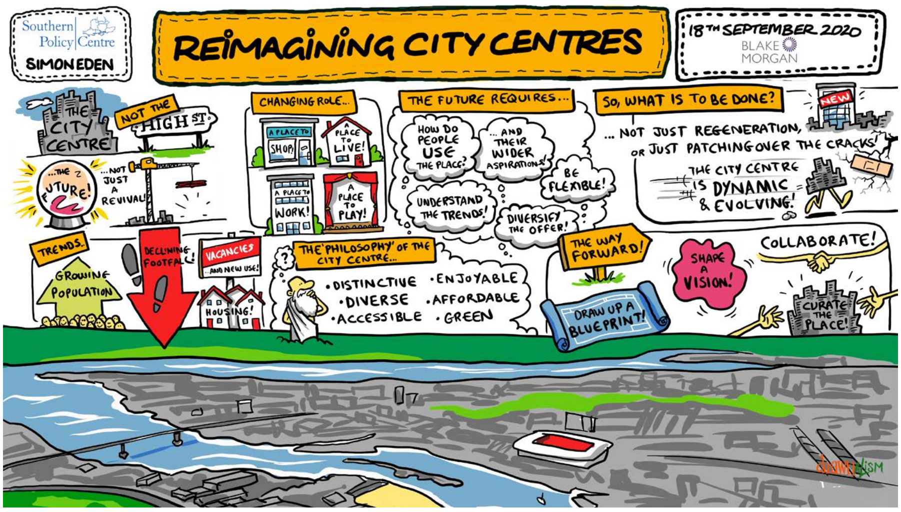
One participant argued "*we must support those willing to take risks and allow them to make mistakes occasionally*". Such an attitude was, they suggested, essential if we are to see creativity and imagination shaping the future. Alongside the willingness to accept risk, we also need to ensure those with creative, imaginative ideas are given a voice and a hearing.

vii. Learn

As in so many walks of life, cities can learn from what others do. That's not to say they should copy others: each place is unique and, as this report has stressed, can only build a future based on its own distinctive offer and circumstances. However, how others have approached the challenge of protecting and improving the city centre is a good way of stimulating fresh thinking about your own place.

There are plenty of good, and bad, examples of different thinking about the city centre and its future whether one looks locally, nationally or internationally. Just a handful give a flavour of the diversity of ideas:

- The Bournemouth-based THAT Group are re-developing the former Knight & Lee department store in Southsea to create a mix of workspace offices, event space, retail, a food and beverage offer and an hotel.[53]
- Preston in Lancashire is developing a co-operative model for its city as a way of tackling inequality. It wants to ensure the economic development of a place is shared more equally among its residents. There is a focus on 'fairness', an emphasis on partnership and support for local businesses and employment – including through local procurement. They are rebuilding their city centre, planning to regenerate key sites, find alternative uses for vacant spaces, shape a strong leisure and culture offer and diversify the local workforce.



- Stockton-on-Tees is responding to a decline in retail by re-shaping the city centre to reduce units and create a public park, changing the place's character by restoring a link between the centre and the river. The Council see the project as part of the continuing evolution of their place, with more emphasis on green open public space.[54]
- Bristol was the European Green Capital in 2015. It has sought to become a more environmentally sustainable city, promoting a number of city centre initiatives to achieve that aim, and help create a distinct, forward-looking identity.[55] The Bristol Green Pound is a local currency designed to support the local economy and encourage environmentally responsible spend.[56] Its approach shows a desire to map out a distinct future for the city and its centre, based on a clear commitment of local residents to protect and improve the environment.
- The Forum, a new building in the heart of the Dutch city of Groningen brings together a range of cultural activity, describing itself as *"a new-style public amenity. It is neither a library, nor a museum. Nor is it a cinema. Here in this space the traditional boundaries between these institutions are simply eliminated"*[57]. It aims to *"inspire"* residents and visitors, and is an essential part of the re-shaping of the centre of the city, creating a clear and distinctive offer.

All of these places share a sense of vision as to what they want to become, and a commitment to working across sectors to realise those aspirations. But each vision is distinctive, built on the place, its characteristics, history, residents and visitors. It works for that place. The value of examples like this is to encourage city planners to think differently, not to slavishly copy.

However, there are salutary lessons in how <u>not</u> to revive a city. One of the best known is the story of Detroit's failed attempts at regeneration by spending on public infrastructure, which shows that expensive civic vanity projects – a monorail, a sports stadium, an office complex – are not always a recipe for success.[59] It's a good example of how our ideas of regeneration can prioritise building, at the expense of stepping back and asking what a place needs.

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There are plenty of good, and bad, examples of different thinking about the city centre and its future whether one looks locally, nationally or internationally.

Chapter 10: The way forward

Our cities are affected by many long-term trends in our society – from the growth of on-line shopping through to an increasing population of students and older people. They are seeing shifts in the use of the private car, "(indeed the private car may disappear from our cities in the coming decades)" in how people work or in how we spend our leisure time. They have to cope with rising pollution and growing concerns about the impact on our physical and mental health. The lockdown to tackle the Covid-19 outbreak has amplified many of these trends, whilst others are being shaped by our exit from that lockdown.

But change is not a new phenomenon, and cities across the world have been shaped by and evolved in response to these trends and many others. Some will argue that the changes cities face are essential stimuli to them remaining successful and relevant to peoples' lives - *"It takes trauma to make a complacent city invest in its future"*[59]. The question is how that change is managed to achieve the best outcomes for all – residents, workers, visitors.

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We suggest the challenge is to "re-imagine" the city centre in response to the value people place on local distinctiveness, inclusivity, wellbeing and the natural environment

Traditionally we see our cities as economic engines, and a vibrant economy is, of course, a key component of their success. But we are coming to realise that the future lies in understanding the balance between cities economies and their environmental and social health[60]. Our response to the economic, environmental and social factors driving change for cities, and not least the likely economic recession triggered by Covid-19, will shape tomorrow's city centre. And it is clear from this report that while the economy is important to people, they also want their city centres to be healthy, sustainable and vibrant places for people.

For many years we have sought to "regenerate" our city centres, with programmes for clearing "slums", building new retail complexes or offices. Occasionally that re-building of the urban environment has found space for affordable homes, new leisure facilities or green open space, although often they are squeezed by a harsh financial model based on high financial returns to meet high development costs.

What is clear from our research is that the task today is different, not least because of the way the trauma of Covid-19 has caused so many to re-evaluate how they live and work. We suggest the challenge is to "re-imagine" the city centre in response to the value people place on local distinctiveness, inclusivity, wellbeing and the natural environment – and to the fact that they want their city centre to be an enjoyable place they want to visit rather than a soulless retail centre.

We consider there are four elements to that re-imagination:

i. Build **collaboration** to shape the future.

Re-imagination is not the task of one organisation. We suggest that those with a stake in the success of the city centre – the local authority and other public service providers, local businesses, local FE and HE institutions and the rich variety of community and voluntary organisations – need to re-imagine their city together, drawing on the thoughts and ideas of local people and organisations.

The challenge lies in ensuring all stakeholders feel they have a voice, but without creating an overly complex bureaucracy which cannot drive the necessary change. It is also to ensure that the process is not driven by those who shout loudest. As one participant said "*the key to successful collaboration is trust*".

Local authorities have a role in convening that discussion, with, as one participant put it, "*democratic legitimacy to shape, guide and where possible facilitate change*". Importantly, they have a direct role in many different aspects of the centre's life, from economic development to culture and youth services. They may be the natural leaders of local collaboration, although in some places it may be the BID, a large local business or another body who is best placed to shape consensus.

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City centres need a clearly articulated sense of what they want to be, and the role they play in the economic, and social lives of the city's residents, businesses and visitors.

Equally, BIDs, which exist in three of the four cities we looked at, have an important role in allowing a broad range of businesses to contribute. Others – our Universities (hosts to the students who make up a significant proportion of the population of each of our cities), health providers or cultural organisations – are important participants in the debate.

This broad range of players need to come together to discuss the future. There are many ways of doing that, whether through some sort of open forum for debate or on-line approaches to involving people and organisations. But however it is done, the shared focus needs to be on achieving change: we found a real frustration with the lack of progress, and the plaintive cry from a local businessman that, for all the planning and debating about the city centre *"NOTHING HAPPENS!"*.

ii. Shape a vision.

City centres need a clearly articulated sense of what they want to be, and the role they play in the economic, and social lives of the city's residents, businesses and visitors. In simple terms this might be described as a vision, although in practice the aims and aspirations of the place will evolve in response to changing circumstances, so that vision must be dynamic and open to change. However that sense of the future is captured, there are some key building blocks.

Firstly, it must **come from participation.** Our research has made it clear that we must shape the centre as a place for people to use, whether to shop, live, work or play. So the starting point for a vision is not commercial development – although that is of course often the key to ensuring projects are viable – but the aims and aspirations of local people and local businesses.

All communities across the place should have the opportunity to input, in ways which draw out their likes and dislikes, aims and aspirations – our experimentation in using deliberative techniques in small groups offers one way of ensuring a richer and more diverse discussion. The aim is not simply to consult, the future city centre must be co-designed.

Secondly, a vision should **build on the city's identity.** It is apparent that successful city centres offer something unique to their place, building on their history and location. Understanding identity, and how local people see that, offers the springboard from which a vision can be created. That should be aspirational but rooted in place – as one participant put it *"never forget where you came from, but don't let it limit you"*.

In talking to local residents we often found a sense of disappointment that the city's identity was not celebrated in its centre and a desire to be *"re-connected with our heritage"*. This is not nostalgia, and it's certainly not xenophobic. It's simply a sense of civic pride which people want to see acknowledged.

A vision should also attempt to **establish some core 'principles'.** Our discussions with local residents helped capture some key and consistent messages about what people wanted in their city centre, summarised in chapter 7. We suggest they offer a sound basis for thinking about the city centre of tomorrow.

These principles may differ from place to place, although given how regularly they were raised, we suggest that they will be pretty consistent across the area we studied. They are important in articulating the framework for building a vision, and provide a template against which ideas and options can be tested.

Finally, it must **learn from elsewhere.** There is plenty of fresh thinking about the role, purpose and future of city centres around the UK, and indeed further afield. They can provide a source of ideas and inspiration as the city centre vision is developed. Whilst we hope we've made clear that slavish copying is not what we'd advocate, someone else's innovative way of looking at things can spark local debate and give birth to interesting new ideas.

iii. Draw up a **blueprint** for implementing the vision.

With a vision in place, stakeholders – our forum – need to decide how to realise it. We've deliberately used the term 'blueprint' in preference to 'plan' or 'masterplan' in suggesting how that vision can be delivered. The last two are in essence technical documents, which often seem to constrain development. One participant captured the constraints this approach risks creating, saying *"for too long planning has been based on a typology of use"*. If we are to realise the city centre of the future we need to ensure that we maintain a focus on the wider picture of what we are trying to achieve economically, environmentally and socially.

The blueprint is an opportunity to understand what the city centre already offers, the strengths of which can be built upon. But it will also help identify what aspects of the vision are further from being realised. So it will include ideas for changing the physical environment, buildings and infrastructure. But it is equally important it addresses the economic, social and environmental changes the city wants which aren't about buildings: the aspiration to provide an accessible transport system or an economy which prioritises local businesses, for example.

Implementing the vision will be an ongoing task, the centre will never be 'finished' and the blueprint will be a dynamic, responsive and ever-evolving document. Moreover, aims and aspirations may evolve over time in response to new or growing challenges and opportunities. Recognising that leads to the fourth step in re-imagining the city centre.

iv. Curate the city centre.

It was notable how many of our participants spoke not of city centre management, but of curation: *"we must curate the city's development"* or *"[city development] requires a public-private partnership to curate the space"*. Curation – defined by the Oxford English Dictionary as the act of selecting, organising and looking after the items in a collection or exhibition – suggests a proactive approach to developing the city centre, one which is not simply directive, but is capable of dynamic responses to new circumstances.

Any equally interesting comment was the suggestion that *"the city centre is a complex organism, the question is how do we manage its wellbeing"*. Again, this view suggests a more flexible and informed response to changes in pressures, priorities and opportunities.

Both perspectives take us beyond notions of city centre management: keeping the place clean, tidy and safe, providing a programme of events or ensuring shops are occupied. It suggests the ability to be more responsive, monitoring changes and reacting in a way which embraces and directs that change, rather than resist it. It requires good, up to date data on topics from retail footfall or attendance at venues and events through to traffic flows or pollution levels. It also needs a strong relationship of mutual confidence and trust between key players.

Thinking about planning, developing and managing tomorrow's city centre from the perspective of curating a place can help as decision-makers approach the process of visioning and creating a blueprint. It also guides ongoing decision-making, informing the juggling of priorities: balancing the needs of the long-established music venue with the concerns of residents' in newly built flats, or the shop-based retailers' worries about street markets and events, for example. It also allows a different perspective on the acquisition, management and rental of buildings and space, moving away from seeing this in a narrow commercial context.

This careful balancing of costs and benefits, opportunities and challenges offers a more effective way of meeting the expectations people have of tomorrow's city centres. The clear message from our participants is that that place needs to achieve a better balance between the demands of a successful economy and growing environmental and social concerns. Curation allows us to create the "responsible place" many spoke of.

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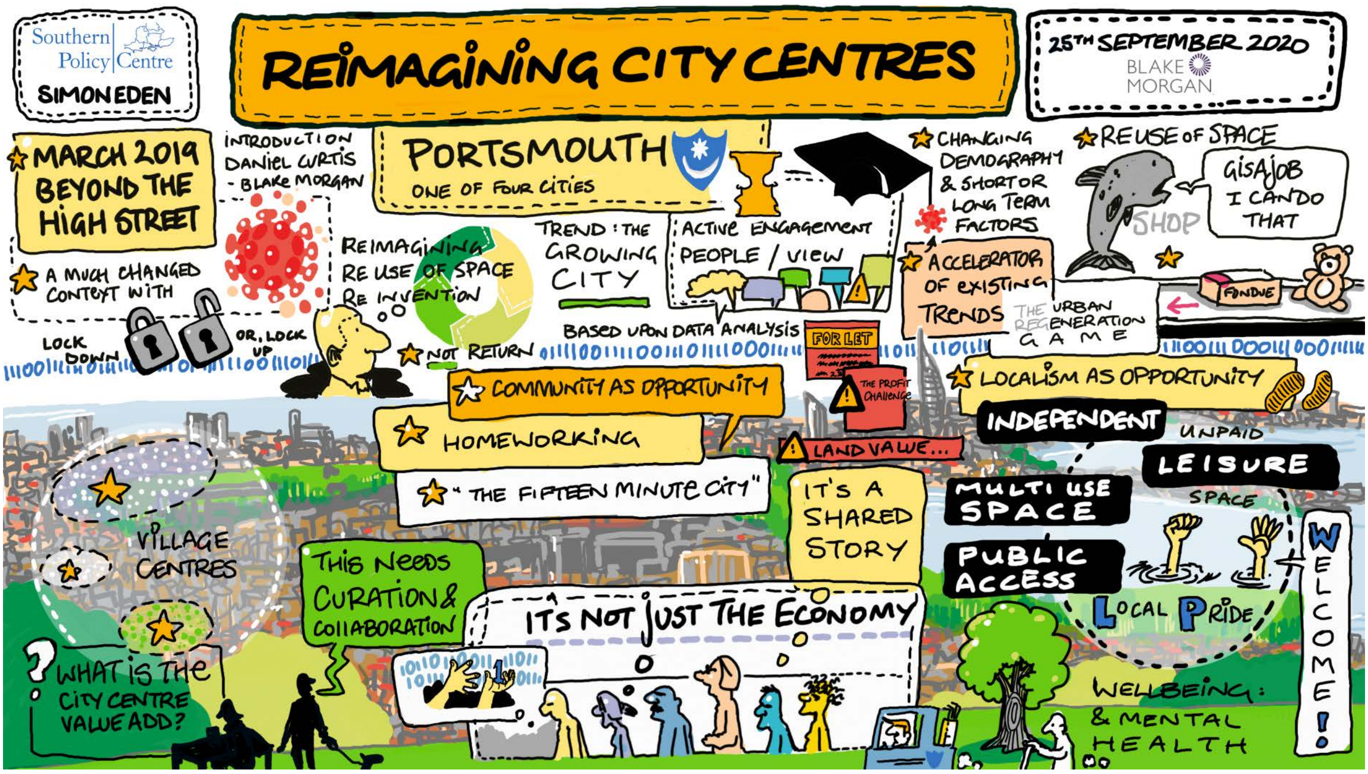
> **Quite how a city goes about curating their centre depends on local circumstances: the partnerships already established, the way in which the views of residents and businesses are gathered or the amount of data already collected on all aspects of the centre's performance. We would simply encourage those responsible for city centre management to take this fresh perspective on their task.**



A final word

As we hope is clear from this study, re-imagining our city centres is not a sequential process, vision-to-blueprint-to-curation. It is dynamic, and must be both flexible and responsive to change. It must include people, be driven by values and be open to taking some risks every now and then. Given the many challenges today's city centres face, we suggest it is essential that thinking about tomorrow's city centre is approached in this way.

We are not offering simple solutions on how to revive the High Street, manage traffic congestion or bring life back to our city centres. There are no such solutions. What is needed is an understanding of the pressures those places face and the societal changes which will affect them, combined with a willingness to build a new future which accommodates change and seizes the opportunities it offers.

Winchester City Centre High Street

Re-imagining Tomorrow's City Centre

Acknowledgements

Many people have helped in the gestation of this report, offering ideas, observations and comment. They are acknowledged below. However, the report offers our own views on the future of our city centres, distilled from everything we heard and found, and our conclusions may not necessarily reflect the views of those contributors.

Our thanks are due to all those who agreed to be interviewed as part of this project: Stephen Browning (Stephen Browning Associates), Andy Collyer & Robin Dobson (Hammerson), Ralph Facey & Andy Skarzynski (Radian), Cllr Mark Howell (BCP Council), Paul Kinvig (Bournemouth Town Centre BID), Cat Mitton (Institute of Place Management), Cllr Steve Pitt (Portsmouth City Council), Tim Rusby (Portsmouth Creates) and Cllr Anne Weir (Winchester City Council).

The report has also been informed by conversations with many others, notably Chris Shephard (BCP Council), Mark Pembleton (Portsmouth City Council), and Matt Hill and Paulina Piotrowski (Southampton City Council). Those who participated in five Friday morning seminars to discuss our emerging conclusions also helped in framing this final report.

Dr Matt Ryan at the University of Southampton helped shape the event we arranged with Southampton residents, whilst James Marshall and Rachel Bone from the City Council helped arrange the event. Andy Collyer, Simon Maggs (Hampshire County Council) and Giles Semper (Go Southampton) spoke to help set the scene for our discussions. Karla De Lima Guedes, Cat Morgan, Ellena Parsons, Ben Thomas and Michele Zadra from the University of Southampton all helped facilitate those discussions (Ben and Michele also led discussions with Portsmouth residents). Mark Pembleton, Mark Thewlis and colleagues at PCC helped arrange our discussions with Portsmouth residents. Of course we are particularly grateful to all the residents who took part in both events, their ideas, thoughts and observations provided a fresh and important perspective on their city centres.

We are also grateful to Paul Spencer at Winchester BID for arranging the breakfast seminar with Winchester city centre businesses, and to those who took part. Becky McDade at BCP Council introduced us to the city's Youth Parliament and helped arrange several events and on-line discussions, where the city's young people made some really important contributions.

Mark Braggins of AHA Digital assisted with the survey of local residents, as did Sam Gibson, Fiona Harvey and Taylor Haydon of BECG. Thanks to them and to those who responded.

Thanks also to Matt Buck and Alex Hughes of Drawnalism, who also created a visual record of our Southampton discussions and final seminars, some of those images illustrate this report.

Colleagues at the Southern Policy Centre have provided valuable help, notably Ruth Eastwood, who has been indispensable in arranging and helping manage many of the events we staged. John Denham and Stewart Dunn have also commented on various aspects of this project, and on earlier drafts of the report.

Finally, we are very grateful to Daniel Curtis and Rebecca Whitehead of Blake Morgan for their enthusiasm and faith in sponsoring this project, as well as their comments and observations which have helped shape it. It has been a pleasure to work with people open to new ideas, and with the patience to allow our thoughts to mature.

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Our thanks are due to all those who agreed to be interviewed as part of this project

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