

Town Centre Development – where now?

Graeme Tulley - Donaldsons

EHTF Conference

8 June 2007

A time for careful reflection !



Planning policy

Consumer trends

Development trends

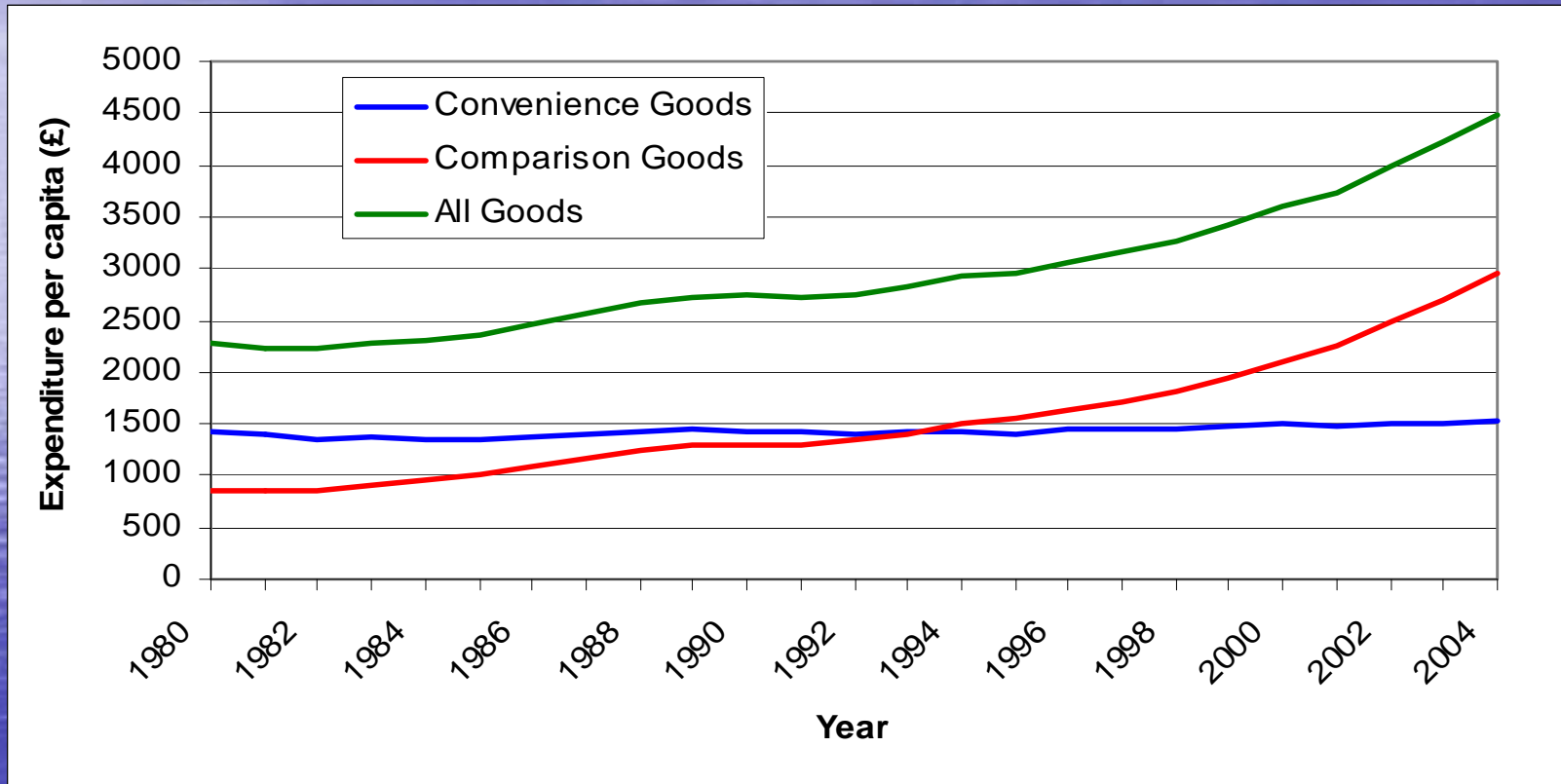
The background of the slide is a photograph of a bright blue sky meeting a calm blue sea at a horizon line. A bright sun is visible on the left side, creating a shimmering reflection on the water's surface. The overall color palette is various shades of blue.

Consumer trends

Consumer trends

- Rise in disposable incomes
- Rise of entertainment and leisure expenditure
- New shoppers – “silver shoppers”
- Convenience, quality, choice, safety
- “Customer experience”not just functional trip
- Ohand we like to shop!

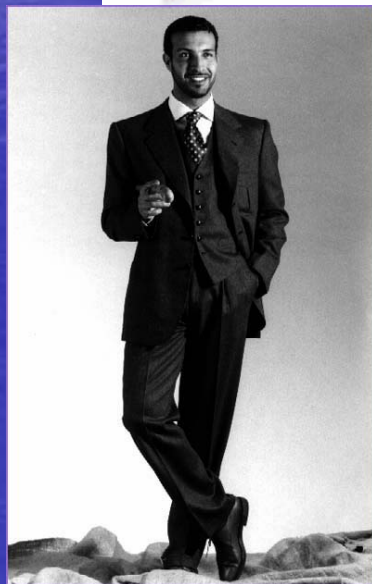
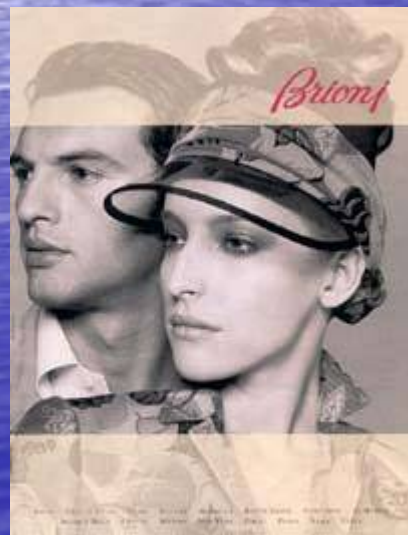
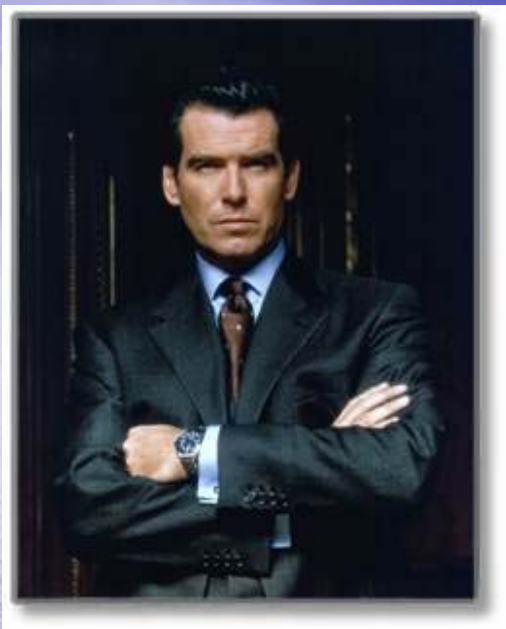
We like to shop !



UK Annual Average Consumer Retail Expenditure by Goods Type (2003 prices)

Source: MapInfo Information Brief 06/2, 2006





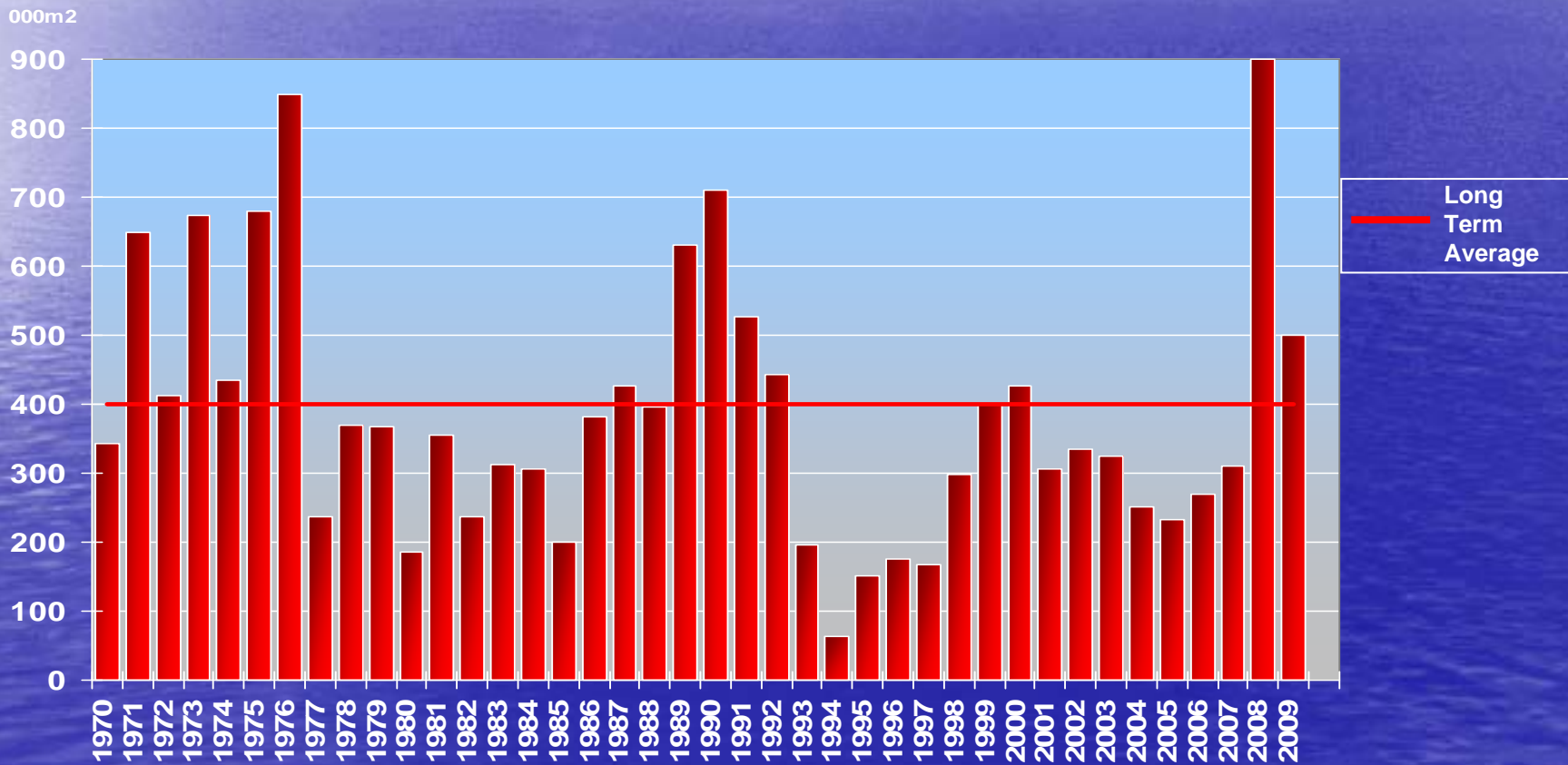


Town Centre Development trends

Development phases

- 1950's – planned precincts and centres
- 1960/70's – enclosed shopping centres/malls
- 1970/80's – decentralisation of food and non-food
- 1980's – regional shopping centres
- 1990's – slowing decentralisation
- 2000's – in town retail led mixed use - major centres

Town Centre opening/projected (1970-2009)



Source: Donaldsons (2006)

Development pipeline

- 36 M sq ft of shopping centre schemes to 2012
- Not a new phenomenon in itself...but
- Polarisation – retail unit sizes and market penetration
- Focused to date on higher order towns and cities
- 8 centres make up nearly all 2008 pipeline





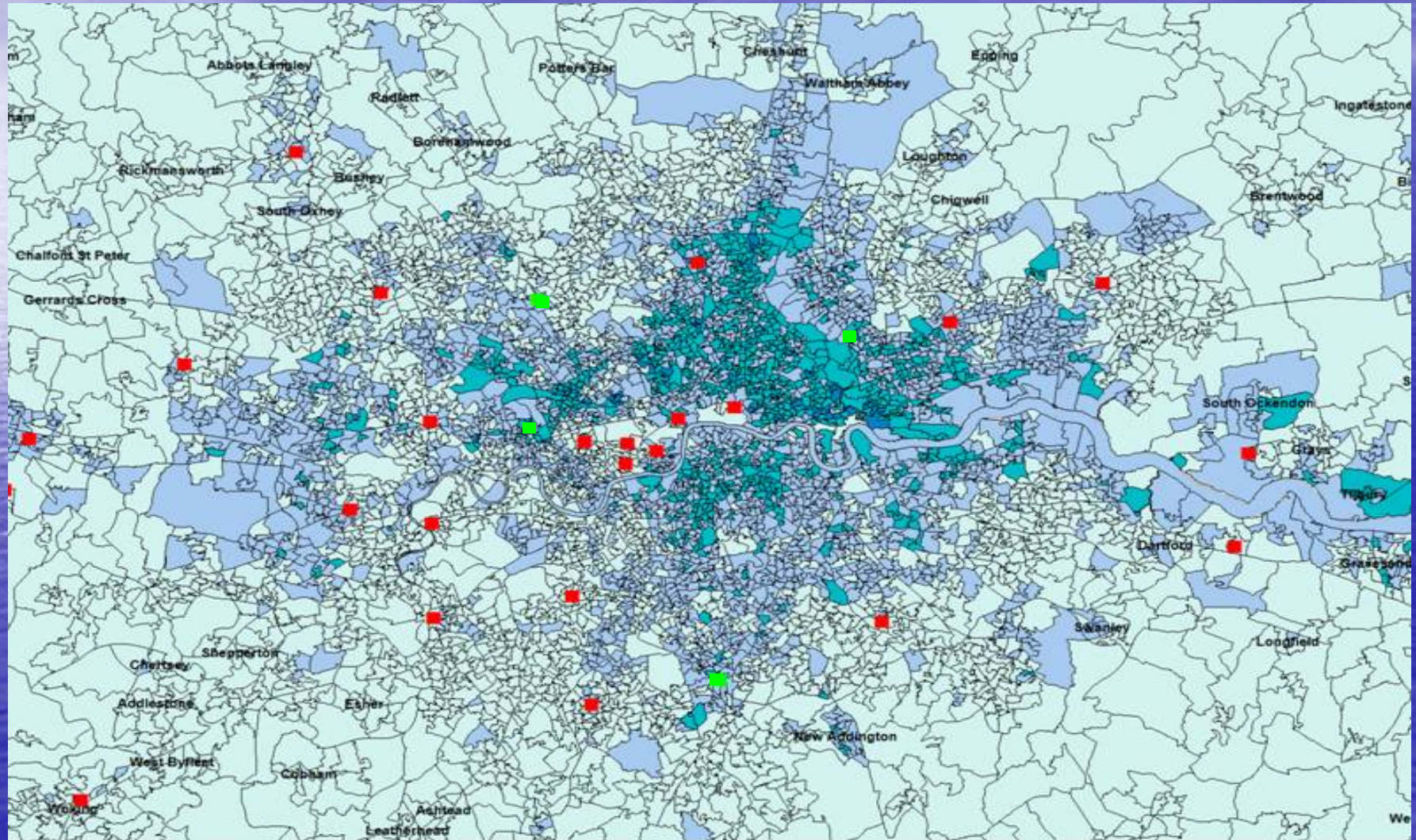
Retail Footprint - Comparison: Centres

- Down
- Up

Scale: 1 : 2,664,433

©2006 NAVTEQ. All rights reserved.
©ACI Limited, 2006
08 September, 2006

London Town Centres development



Implications for Retail Hierachy?

- Regional centres - being regenerated
- Market also addressing next tier down
- Historic towns – good market sentiment
- New towns and growth areas
- Edge of centre locations – major capacity
- What of the rest – the greatest challenge?



Planning Policy

Town centres – where have we been?

- PPG 6, PPS1, PPS 6 – a town centres success story!
- 1994 (25%) – 2004 (41%) in/around town centres
- the urban design agenda – new parameters
- But... 60% next decade will be edge or out (BCSC)
- e.g. open A1 parks – food and non-food

Town centres – where are we going?

- *White Paper (May 2007) – town centres*
 - “Committed to V&V for town centres”
 - “Proactive LA’s” – e.g. “extending boundaries”
 - Needs test has had “unintended effects”
 - Replace need and impact with “new test”... that
 - ...“Supports town centre investment”
 - ...“Has a strong focus on town centres first policy”
 - ...“Promotes competition and consumer choice”
 - Consult summer 2007

Climate Change

- White Paper (May 2007) – Climate Change
 - At centre of “good planning“ No.1 priority
 - Finalise PPS – “Planning and Climate Change”
 - Higher standards and more renewable energy
 - “Radical “ Merton rule (10% recyclables)
 - RSS/LDF tested for “carbon ambition”
- Retailers CSR requirements
- Additional development costs ?
- Favour in or out of town?

So what is the future ?

- Some towns will need to find new roles
- Genuine mixed use schemes – some not retail led
- More enabling development to achieve goals
- More negotiations and trade offs
- Growing complexity/importance of planning



Town Centre Development – where now?

Graeme Tulley - Donaldsons

EHTF Conference

8 June 2007