



# Re-imagining the high street

Escape from Clone Town Britain

**The 2010 Clone Town Report**

**nef** is an independent think-and-do tank that inspires and demonstrates real economic well-being.

We aim to improve quality of life by promoting innovative solutions that challenge mainstream thinking on economic, environmental and social issues. We work in partnership and put people and the planet first.

A report from the Connected Economies Team

**nef** (the new economics foundation) is a registered charity founded in 1986 by the leaders of The Other Economic Summit (TOES), which forced issues such as international debt onto the agenda of the G8 summit meetings. It has taken a lead in helping establish new coalitions and organisations such as the Jubilee 2000 debt campaign; the Ethical Trading Initiative; the UK Social Investment Forum; and new ways to measure social and economic well-being.



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# Foreword

Why does it matter that our town centres increasingly all look the same? Is the spread of clone towns and the creeping homogenisation of the high street anything more than an aesthetic blight? We think so. Yes, distinctiveness and a sense of place matter to people. Without character in our urban centres, living history and visible proof that we can in some way shape and influence our living environment we become alienated in the very places that we should feel at home.

But it is about much more than that. In the 1980s Britain soundly rejected the dehumanising character of a state, centrally planned economy. Yet without really being consulted, we have ended up with something as bad, if not worse, a corporate, centrally planned economy that lacks even a public sense of responsibility for the welfare of the people it serves. The chain stores and global brands that have taken over our high streets have legal obligations to put the interests of investors first, and take decisions in remote corporate headquarters, inherently removed from their local consequences.

The recession is revealing too how the clone retailers can be fair weather friends. As soon as an area no longer meets tightly defined corporate criteria they will wave goodbye. For this reason, diversity matters for local economic resilience. Locally rooted, independent retailers relate differently to the communities they serve. In economic terms, more of the money spent in them is liable to stay and re-circulate in the local area. They are more likely to support other local businesses too, rather than procuring the goods and services they need from other remote national and international suppliers. In difficult times, locally rooted stores are also more likely to go to greater lengths to remain open, doing whatever they can to keep trading.

Where large clone stores dominate, research shows that people become less engaged with community life. They have fewer conversations while out shopping and can even be less likely to vote. Human relationships and the quality of civic life suffers.

But now we have an opportunity. Our high streets can become centres of economic and social revival. Just what is needed for a 'Big Society'. By bringing empty properties back into use we could see a proliferation of new local food hubs to sell and learn about local food production. There could be energy saving hubs to provide the latest on saving energy, going green and saving money. There are openings for time banks and tool share initiatives to bring people together, again these save people money and increase the range of services available locally. Local finance hubs that offer a range of alternative arrangements to the discredited big banks – such as credit unions and local currency schemes could also expand. All of these could underpin a local economic renaissance, increasing vibrancy and resilience.

Turning the tide on Clone Town Britain is about much more than getting rid of dull uniformity. How we organise our high streets carries a kind of DNA for our communities. We know from nature that a diverse gene pool is necessary for good health. Economic diversity is vital too for healthy local economies. With that in mind, it is now time to re-imagine our high streets for the benefit of everyone.

Andrew Simms  
Policy director, **nef**

# Executive Summary

In this report **nef** offers up a different vision of our high streets – one which does not rely on our being merely consumers but on developing a different experience of the high street which supports us to live better, more sustainably. If we are to meet a range of challenges that we face, from climate change to the economic crisis, we need to bring our high streets back to life.

**nef**'s *Clone Town Britain Report* published in June 2005, called attention to how the increasing domination of large chain stores left our communities and high streets vulnerable to economic shocks. Now, as the economic crisis plays out in the UK economy, it is clear just how vulnerable the domination of chains on our high streets has left them. In times of recession, chain stores have proven to be fair weather friends. Some have abandoned the high street entirely migrating to large, high volume trading locations. Others have simply shut less profitable stores.

In 2009, at the height of the recession, we once again took stock of the nation's high streets. We found Britain still to be a nation of clone towns.

Key findings in *Re-imagining the high street* include that:

- 41 per cent of the towns surveyed were clone towns, 23 per cent border towns and 36 per cent were home towns.
- In actual numbers, the survey revealed 36 clone towns, 20 border towns and 31 home towns.
- Of the London villages surveyed 43 per cent were clone towns, 7 per cent border towns and 50 per cent were home towns.

The UK's highest-scoring clone town from those surveyed is Cambridge which managed a poor 11.6 on the clone town scale, with 0 – 100 representing clone town to home town. This may seem surprising. Cambridge, with its dreaming spires and huge tourist pull, might not be expected to snatch the dubious crown of the UK's most cloned town out of the hands of our 2005 'winner', Exeter – which in our survey has slipped to joint second place with Reading. It is not so surprising when you look beyond the academic spires to the high street where you find diversity is a stranger with only nine varieties of shop reported in our people's high street survey.

The highest-scoring home town was Whitstable, Kent, which scored an impressive 92.1 on our scale and boasts a wide variety of independent shops in the town. Famous for its Oyster Festival and a growing food culture, members of the community are trying to ensure that any further development within Whitstable celebrates local distinctiveness, and supports the development of a local culture that is sustainable.

Of the London Villages surveyed, West London's high streets are losing their identity more rapidly than other parts of the city, with 9 of the 13 West London villages registered as clone towns. Richmond tops the table with just 5 independent traders counted on its high street. Only Shepherd's Bush registered as a home town from West London. How long this status can be maintained remains to be seen with the opening of the largest urban area indoor shopping centre in Europe – 'Westfield London' – right next door, complete with over 250 chains stores.

Of the 18 London villages that were re-surveyed from 2005, Hampstead, Camden and Brixton all moved from border to clone status. There was better news for Streatham Hill, improving from a border to a home town and Muswell Hill, which moved from a clone to a border town.

The recession has left holes on the high streets with the dramatic collapse of such household names as Woolworths and Barratts. In 2009 a reported 17,880 retailers had shut up shop. The towns most dependent on the biggest chains and out of town stores have proven to be most vulnerable to the economic crisis. The impact of high streets facing creeping abandonment, on our communities and our sense of social cohesion, is only beginning to be understood. But, it is becoming clear that a Big Society cannot be built on the fractured foundations of undermined local economies.

And, as we face the additional challenges of climate change and peak oil, we find that the cloning of our towns and cities has created a brittle infrastructure unable to respond to these challenges. Understanding this bigger picture is crucial to determining what antidotes are necessary to prevent the further homogenisation of our high streets and support Britain's transformation towards a low carbon future.

Communities are already fighting back and the current crisis offers a huge opportunity to re-imagine our high streets. New powers such as the Sustainable Communities Act 2007 provide a way for residents to take control. The transition town network is inspiring increasing numbers to take action in their community and move away from our unsustainable dependence on fossil fuels. Ways to support increased local spending on the high street such as the Wedge Card and alternative local currencies such as the Lewes Pound and the Brixton Pound are being used more widely, and communities are increasingly taking control of services such as post offices and local shops to ensure their continued existence.

Rising to the challenge of climate change and peak oil will require a different development approach: one which harnesses the potential of local entrepreneurs, includes residents in the planning and delivery of schemes which intimately affect how they live, and recognises that public well-being is the overarching principle of success, not merely the growth of the retail sector.

With a little imagination, our high streets could become places where we go to actively engage with other people in our communities; places where shopping is just one small part of a rich mix of activities including working, sharing, exchanging, playing and learning new skills. As the hub of our communities, the high street could become the place where we begin to build a more sustainable world.

This report contains a range of policy solutions and actions to transform our high streets:

## **What you can do**

### Take action

- Be Active, Take Notice and Connect with people around you to grow a thriving town centre for where you live.
- Use your independent cinema, local independent retailers and markets. Independent high street business can only survive if local people buy from them – seek out independents and locally sourced products.
- Join or help to create a local Transition Town group, or civic society.
- Get involved in running a local currency
- Use FreeCycle to redistribute your unwanted goods and belongings.
- Grow more of your own food.
- Run (or attend) a re-imagined high street project in your community. People need to help planners create a re-invigorated community – Government; (central or local) cannot deliver this alone.

### **What local government and other public institutions can do**

- Establish High Street Hubs in key vacant shops to accommodate activities that help develop local economic sustainability. These could range from local currency development (like Brixton £) to local food distribution and tool share/exchange schemes. NB. These are NOT general 'community centres'.
- Sign up to the Sustainable Communities Act
- Make residents an equal partner in your Master Planning processes
- Design well-being, distinctiveness and sustainability indicators into your Master Planning processes.
- Build in well-being measures in addition to sustainability into your procurement policies
- Support and help grow local Community Land Trusts
- Pursue the principles of Shared Space in your public space development
- Ensure resident participation in Business Improvement Districts

### **What national government can do**

- Roll out the Post Office Bank
- Develop a land registry of commercial property so we can understand who owns our town centres.
- Create an Empty Dwellings Management Order instrument for Local Authorities to apply to empty builds to bring them back into active use for public benefit.
- Establish a Local Competition Ombudsman as recommended by the Competition Commission which will reign in the power of the big four grocery chains.
- Revising allotment legislation to encourage Local Authorities to provide more allotments, community gardens, community orchards or market gardens.
- Introduce an addition to the small business rate relief giving local authorities powers to offer discretionary business rate relief for new low carbon businesses moving on to the high street and to existing small and medium independent businesses who commit to reducing their carbon use.
- Introduce well-being indicators into all Planning Policy statements
- Introduce a Green Investment Bank

# Part 1: High street collapse?

*Where loss of genetic diversity threatens the survival of species and makes natural ecosystems vulnerable to collapse, clone towns imperil local livelihoods, communities and our culture by decreasing the resilience of high streets to economic downturns and diminishing consumer choice.*

*Clone Town Britain, nef (the new economics foundation) 2005*

Five years ago, nef's *Clone Town Britain: The survey results on the bland state of the nation* revealed how the nation's high streets were being overtaken by identikit chains stores and supermarkets. Guilty of destroying the identity of our towns, this cloning of our town centres also increased their vulnerability to economic shocks. Just as in nature, where an optimally diverse ecosystem is more resilient to shocks, and better able to recover from them, we argued that a diversity of types, size and ownership of shops is vital to a creating a dynamic and resilient local economy.

The current recession has exposed the vulnerability of our economy and, unless action is taken, threatens to undermine our local economies. The figures already indicate that this is happening. Of the £288bn consumers spent in 2008, more than half – £163.6bn – can be classed as 'indulgence' spending<sup>1</sup> which is vulnerable in a downturn. The latest figures released on consumer spending<sup>2</sup> indicate that UK household's expenditure in 2009 fell by 3.4 per cent. Major drivers of this decrease were transport, spending on personal care products, related services and personal effects<sup>3</sup> and restaurants and hotels, which fell by 5.6 per cent, 4.5 per cent and 6 per cent respectively.<sup>4</sup> The first three months of 2009 alone saw 35,000 retail-related job losses.<sup>5</sup>

The planned public spending cuts of £113bn announced in the new government's 2010 budget will lead to increasing job losses and, coupled with the impact of the planned VAT rise, will further constrain demand on the high street. At the time of writing this report (August 2010) the expectation in many quarters is that this will result in a double dip recession rather than economic recovery.

Meanwhile, small businesses and local services, which have been closing at record rates over the past decade under unfair competitive pressure from the multiples, are faced with a loss in access to credit as the UK's banking system, after years of making profits through speculative activity on international markets, proves itself completely incapable of supporting local economies.<sup>6</sup> Today, the new government finds itself with an apparent standoff between banks, who say there is no demand for lending by small businesses, and small businesses, who say they are not applying for loans because they believe them to be too costly and that they would, in any case, be refused.<sup>7</sup> Figures released from the Bank of England in July 2010 indicate yet again that more loans are being repaid than lent by the banking sector. Since the 2008 banking crisis figures from the banks on their lending showed that it had only exceeded repayments in three of the months in the period.



So, from a bleak portrait in our first survey in 2005 – of high streets being cloned with multiples dominating shopping areas from Thurso to Taunton, we are now faced with their selective retreat, a reverse leverage leaving large swathes of many high streets with empty store fronts. The impact on employment is already huge (see Table 1). The impact on communities and our sense of social cohesion as a result of high streets facing creeping abandonment is only beginning to be understood. But it is becoming clear that a Big Society cannot be built on the fractured foundations of broken, undermined local economies.

In this report, **nef** offers up a different vision of our high streets – one which does not rely on consumption but on developing a different experience of the high street, offering diverse activities and the active engagement of local communities. To understand the necessity of this vision, we have to analyse how our high streets, the centres of our towns, cities and neighbourhoods, have reached the state they are in.

### The Retreat of the Glittering Chains

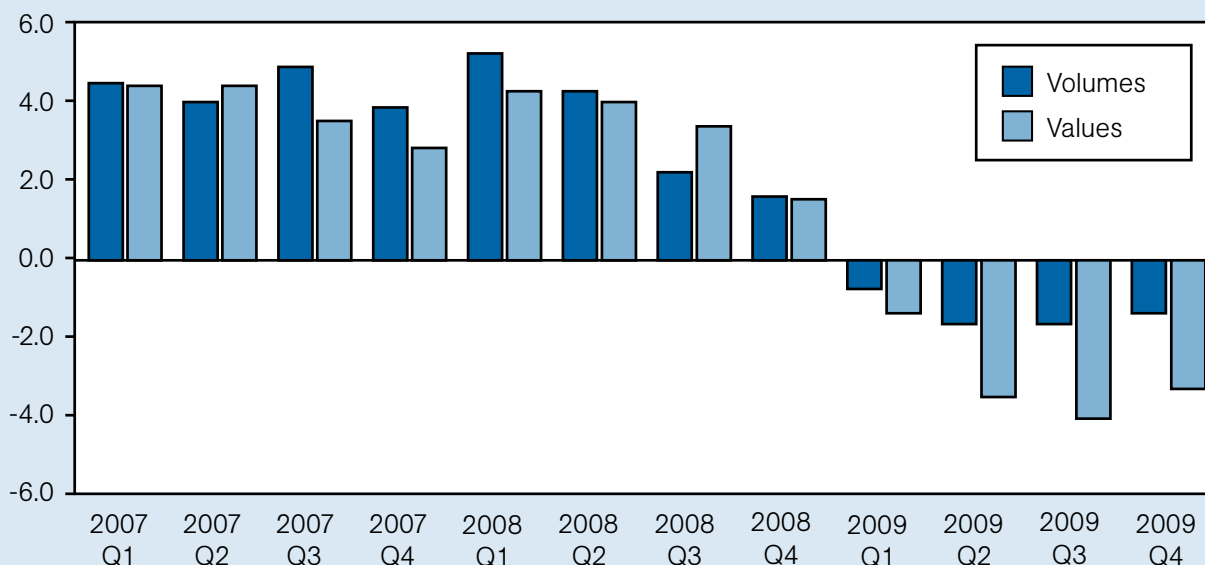
On the high street, the trend is that multiples<sup>8</sup> emerge from recessions with an increased share of the consumer market, and with a more firmly established network of branches. However, this is achieved through consolidation and concentrating their activities in higher volume trading locations. In 2007, there were approximately 200,000 retail businesses operating in the UK, with a relatively small number of multiple retailers occupying almost 80 per cent of total sales. On our local high streets they have proven to be fair weather friends, and as sales figures collapsed, so did their shop numbers.

*“We’ve got 25 underperforming Simply food stores... which are simply too small for us to be able to deal with in a profitable way and we’ve had to take some harsh action on that today.”*

Sir Stuart Rose, Chief Executive,  
Marks and Spencer, 7 January 2009

Although during the recession period of 2007-2009 retail multiples' branch openings were greater than closures, branch shedding has been concentrated in small shop convenience related areas, motor-related and bulky goods (builders merchants, general furniture and office supplies).

**Figure 1: UK Retail sales volumes and values (2007-2009) % change on a year earlier**



Source: National Statistics, Experian

## From Clone Town to Ghost Town: Dumfries

Dumfries, our second highest scoring Clone Town in 2005 has been hammered by the credit crunch. In August 2010 it had 30 empty retail units in total according to the Dumfries and Galloway Standard.<sup>11</sup> The high street was hit hard in 2009 with 14 shop units lying empty including the space left by the collapse of the retail giant Woolworths – which Iceland now plans to take over. Half the huge units at Cuckoo Bridge, a major out of town retail – park, sit empty “adding to the thousands of square footage of retail space throughout Dumfries which is crying out for help”, reports the local newspaper.<sup>12</sup>

High streets lined with homogeneous chain stores selling narrowly differentiated consumer goods have suddenly found themselves emptying out, as the easy credit-driven consumer binge of the last decade comes to a dramatic end. The rapid increase in the number of empty shops on the high streets has been driven for the most part by the continuing trend (accelerated during the recession) of larger multiples moving to locations with increased customer numbers and space, increases in internet shopping, and the impact of the recession on smaller independents.

The Local Data Company report released in February 2010<sup>9</sup> investigated nearly 700 shopping locations throughout Britain and found 17,880 retailers had shut up shop by the end of 2009, although the rate of closures declined significantly during the second half of the year. Topping the list of vacant retail premises was the seaside town of Margate in Kent with a reported 27.2 per cent of shops vacant. Shopping centres in the North East and Midlands also fared badly: Wolverhampton has 23.9 per cent of shops empty, with Bradford, Middlesbrough and Sheffield following closely behind. The average UK vacancy rates currently stand at 12.4 per cent.<sup>10</sup>

The towns most dependent on the biggest chains and out of town stores have proven to be most vulnerable in the economic crisis.

The vulnerability of our multiple-led model of high street development to recession was brought firmly into focus at the end of 2008 with the collapse of a number of high profile retailers. In some cases the demise of the chains has been dramatic.

A century since its first store opened in Liverpool in 1909, the last Woolworths store closed its doors in January 2009. Altogether, 807 Woolworths stores closed, 20 per cent of which remained vacant at the end of 2009 (by definition the less desirable in terms of the customer footfall) at the cost of 27,000 jobs. The chain's demise was met with an outburst of national nostalgia but less attention was paid to the knock on effects on the high street. Zavvi, previously Virgin Megastore, the UK's largest music retailer, suddenly lost its main distributor of CDs and DVDs and was also forced in to administration.

**Table 1: Major high street multiple retail – job losses and store closures April 2009.**

<b>Company</b>	<b>Job losses</b>	<b>Store closures</b>
Woolworths	27,000	807
Stylo Group (Barrats & Priceless shoes)	2,500	220
Zavvis	1,518	125
Celebrations (Greetings card group)	1,400	214
Marks & Spencer	1,230	25
Shop Direct (catalogue retailer)	1,150	0
Freemans Grattan Group (Catalogue retailer)	1,000	0
Adams	850	111
JJB Sports (Lifestyle division)	559	55
Vodafone	500	0
Makro (cash & carry retailer)	378	3
Empire Direct	350	14
Home retail group (Argos & Homebase)	300	0
Burberry	290	0
The Officers Club	280	32
MFI	260	111
Halfords	250	0
Waterstones	200	20
Passion for Perfume	195	45
Body Shop	150	0
Original Shoe Co & Qube Fashion	121	10
Sofa Workshop	120	20
Principles	110	66
ProCook (kitchenware retailer)	100	18
Land of Leather	95	33
<b>Total</b>	<b>40,906</b>	<b>1,929</b>

By the end of 2009, retail multiples going to the wall or those forced to reduce branch numbers left vacant 11,000 shops (6 per cent of the total). When the recession lifts, multiples are unlikely to re-occupy premises in urban areas, small towns and rural areas if they fail to meet the customer footfall and floor space demands of their identikit chain formats.

### **How much retail is enough? A warning from ghost-town America**

*“America is overstored – too many formats cannibalize each other... Dead and dying malls litter the nation’s suburbs. Most [big-box] power centers are risky propositions, as category killers and discounters battle amongst themselves in submarket-by submarket survival contests. The only sure thing is that owners will be challenged to re-lease empty boxes abandoned by the losers.”*

PricewaterhouseCoopers, *Emerging Trends in Real Estate*, 2002<sup>14</sup>

In the UK we are far from the 46.6 square feet of retail per capita that is currently drowning the economy in the US,<sup>15</sup> but the volume of retail space in the UK is rising, and fast. Not only is the amount of retail space in the UK increasing, so too is the size of new developments.

Warnings on the over-supply of retail were ignored by planners in American cities. Fuelled by cheap credit and land, they continued on a retail development boom even when the economy began to slow in 2007. More than 140 million square feet of new shopping centres and big box stores opened that year alone.<sup>16</sup> Since the 1990s, the American retail sector has been expanding at a much faster rate than consumer demand. Between 1990 and 2005, the amount of store space in the US doubled, ballooning from 19 to 38 square feet per capita whilst income grew by just 28 per cent.<sup>17</sup>

Britain has experienced a similarly unprecedented retail expansion. A staggering 88 million square feet of new stores has been added over the past 20 years.<sup>18</sup> This includes gargantuan gilded shopping centres such as *Westfield* in London's Shepherd's Bush (a retail floor area of 1.615 million square feet, the equivalent of about 30 football pitches), *Liverpool One*, 1.4 million square feet (28 football pitches), *Cabot Circus*, 1.5 million square feet in Bristol and, featured in our Clone Town case studies, *The Grand Arcade*, 450,000 square feet, in Cambridge.

Research in the UK has shown that the large multiple retailers actually suck money out of a local area as their supply chains are predominantly national, and their presence tends to weaken local supply chain linkages that serve local retailers. An analysis of supply chain spending patterns found that approximately 90 per cent of spending from supermarkets and chain stores leaks out of the local economy almost immediately, and there is little evidence to suggest that their impact on the local economy has, or is likely to improve.<sup>19</sup>

According to Stacy Mitchell, Senior Researcher at the *Institute for Local Self-Reliance*, massive retail expansion in the US was possible because the big box retailers adopted a predatory expansion strategy, built not on meeting increased local demand but siphoning economic activity from other parts of the towns they occupy.<sup>20</sup> By zoning new land for retail, US cities have given developers little incentive to redevelop older shopping centres. The victims have been not only high streets and independent stores but also other, multiple retailers.

*"You have seen these waves of retail development in the US with each new wave eating what came before" says Mitchell. "First you had the strip shopping centres, then the malls, then the bigger 'power malls', then the big box retailers. There are now hundreds of these places lying empty across the U.S."*

The physical and psychological costs to the community of these empty retail spaces are enormous – they drag down house prices, become the focus for criminal activity and generally make towns less attractive. However, "at the moment there is no real penalty for multiple retailers who leave premises abandoned," says Mitchell, "and quite a lot of upside for them in terms of gaining market share."

### **Erosion of our public life**

The proliferation of chain stores has also isolated us from one another. According to the 2005 *Time Use Survey*, 37 per cent of us shop every day, while only 33 per cent of us spend time at home with friends and family. It has isolated us from the conditions under which many of the goods we consume are produced. When our clothes are produced in far distant factories it is easy to forget the conditions they were created in. Child-labour, long hours and dangerous conditions can be countenanced if they are taking place somewhere else.

Closer to home, it has also vastly reduced and impoverished the human exchanges that connect us, and the social networks that support our personal and communal well-being.

The domination of our town centres by large chain stores, and the invasion of the shopping mall has led to an erosion of the public realm. The creeping privatisation of our cities has worn away at the notion of shared space over which we take collective responsibility. Yet this ability to share resources is central to our economic resilience – it provides a common pool that we are able to draw on in times of need.

In 2006, a report by the journalist Anna Minton for the Royal Institution of Chartered Surveyors, examined the growing private ownership and management of the public realm, and showed an alarming rise in large mall-style shopping developments – “over-controlled, sterile places which lack connection to the reality and diversity of the local environment”. Each new development has become a mini retail-fiefdom, zealously guarded by its own private security. In London, the Broadgate Centre, a 30-acre site owned and managed by development company Broadgate Estates is patrolled 24 hours a day by private security, and is aimed specifically at attracting ‘high-earning people’.

### **The creeping dominance of supermarkets**

In addition to the pressures of the recession, research by Stirling University<sup>21</sup> has again highlighted the impact of supermarket development on the high street, noting that high street diversity is diminishing as a result of supermarket developments.

During the period 2007–2009 larger grocers and their ‘local’ styled outlets have expanded across high streets at the expense of 914 branches of smaller shop multiples in the sectors of confectionary/ tobacco/newsagents, off-licences, tea/ coffee and bakers. Non-food ranges are also firmly in the sights of the major grocers: between 2003 and 2009 the large grocer’s share of non-food sales grew from 8.4 per cent to 13.5 per cent. As a total across the UK the number of chemist outlets grew by nearly 20 per cent, however this figure masks the fact that almost half of this expansion was due to the opening of in-store units by the largest four grocers (Tesco, Morrison, Asda, J. Sainsbury). Books and clothing are also areas where major retailers have expanded their product range, and this added pressure combined with increased internet shopping has contributed to a net loss of 189 bookshops.

### **Support our independents**

*“High streets are the heart of local communities and economies – providing jobs and essential services. Their future success cannot be left to chance. Town centres need to be effectively managed by local authorities with their retailers, other businesses and residents.”<sup>22</sup>*

British Retail Consortium, 2010

Whilst media attention has focused on the headline job losses from chains and big corporations, it is small businesses that account for the majority of private sector jobs: 46 percent in 2008, around 11.5 million jobs overall.<sup>23</sup> The majority of retail businesses are not multiples, they are small independent retail businesses, with over 75 per cent employing four or less people.

There are approximately 900,000 shops in the UK,<sup>24</sup> almost half of which can be found around urban areas, small towns and rural areas, for instance, those shops outside of what are considered higher volume trading locations and by definition less attractive to Multiples. Multiples occupy only 20 per cent of these shops, and although this represents 65 per cent of the available shop floor space in the UK, this figure only serves to remind that they are not the mainstay of our local high streets. It is the independent sector that provides goods and services locally, and where we need to place our hope, and give our support to if we are to revive our local economies.

The withdrawal of bank branches from high streets – a deliberate cost saving measure by retail banks – has meant more inconvenience for customers and a reduction in the customer footfall and business on the high street. Our monopolised banking system is no longer structurally fit to serve the dynamic small enterprises that keep our local economies alive, and provide the social glue that hold our communities together.

Understanding these dynamics on our high streets is important if we are to find alternative solutions to the malaise affecting our local economies. In the following chapters we report the results of the clone town survey and how communities are fighting back to reclaim their distinctiveness.

### Box 1: Local shops and services in the UK under threat:

- 70 per cent of villages in England, some 7,000, are without a shop of any kind.<sup>25</sup>
- 40 per cent of bank branches in the UK have closed since 1990, with 2,737 bank branches closing in the last ten years, according to the Campaign for Community Banking.
- Up to 1,000 small stores could close on the back of the Post Office's closure of 2,500 offices.<sup>26</sup>
- 39 pubs are closing each week because of the combination of low supermarket prices and high taxes. And these are not just rural pubs. Recent failures have taken place in urban or semi-urban areas, in some cases across the road or next to a closing post office.<sup>27</sup>

### Box 2: The local economic value of Street Markets

Street markets keep more money circulating in the local economy for longer. They provide twice as many jobs as supermarkets, support retail diversity by providing space for a range of independent local traders, and provide a low risk environment in which new enterprises can flourish. For example, analysis by **nef** of Queens Market in East London, found that it generated over £13 million for the local economy, of which £9 million was spent on food. The market provided employment for 581 full time equivalent employees, of which 308 were local. Employment density (the ratio of employment per square metre of space) was one employee per 10 square metres at the market, nearly double the rate of employment at food superstores/supermarkets. In addition, 99 per cent of the 140 retailers at Queens Market were independent businesses.<sup>28</sup> Money is not only spent directly at markets – they support other local retail and bring wider regeneration benefits.

## Part 2: The clone town parade 2009

*The Clone Town Britain Survey*, launched by **nef** in 2004, was designed to be a people's survey of their high streets, and a rallying cry for action against their homogenisation, by providing a methodology to broadly quantify the loss of diversity on a community's high street.

The Survey groups high streets into three broad categories: *clone town*, *border town* and *home town*, with high street diversity increasing across these categories. A *home town* is a place which has an individual character and is instantly recognisable and distinctive to the people who live there. By contrast, a *clone town* has had its individuality removed and replaced by a monochrome strip of global and national chains and could easily be mistaken for dozens of other bland town-centres across the country. In between lie the *border towns*, at risk of the *clone town* fate, yet hanging onto a semblance of individuality...*just*.

Whether a town feels like a clone town or a home town says something very specific about the health of a local economy. Although apparently economically healthy, clone towns have very little local retail left. This means that less money is likely to be circulating in the local economy, the social glue that holds the economy together will be weak, and the town is likely to have little left of the enterprise and infrastructure that supports economic resilience. In times of economic shock, as we have seen in the previous section, multiples 'rationalise' their activities, close less profitable outlets and generally flee the high streets leaving them vulnerable to becoming ghost towns.

### The methodology

In the 2009 survey we re-surveyed some of the key clone, home and border towns of the original 2005 survey to see how they had fared in the intervening period. Responding to the upheaval created by the economic crisis set publication of the results back, but this has allowed us to take a longer view of how different trends interacted.

The methodology involves a town's residents counting and categorising between 40-60 shops on the high street according to ownership, starting from what could be considered its centre, and recording whether the shops are independently owned or part of a chain, and the type of shop (based on 26 different categories).

Surveys were only recorded for towns with a population size of between 5,000 and 150,000. Places below this population size may not have a sufficient sample of shops to survey and above this size, a town is highly likely to have more than one retail 'centre'. For the 2009 survey, an additional category of Post-Office was introduced, and we enhanced the survey methodology to be more sensitive to retail diversity.<sup>29</sup> This means that whilst the overall categorisation of *clone*, *border* and *home town* 2005 and 2009 results remain comparable, the specific scores from each survey year do not relate to the same information and should not be directly compared. Box 3 illustrates the methodology behind the clone town survey.

As with the 2005 survey, because of its unique character, we separated out the results for London from the rest of the UK. Where the same location has been surveyed more than once, and the scores were not identical, an average of the results was used.

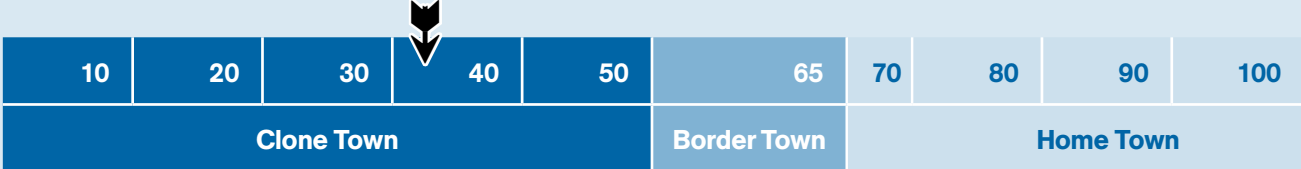
### Box 3: Clone town methodology

#### Example: 'Blandton'

A survey of 50 shops carried out on the high street of 'Blandton' found 18 different types of shops. It also revealed that, out of the 50 shops counted, 10 were independently owned and 40 were chains. 'Blandton' therefore received the following score:

$$\text{Clone Town Britain Score} = \frac{10 \text{ (no of independent stores)} \times 75 = 750}{50 \text{ (number of shops)}} = 15 + 18 \text{ (no of types of shop)} = 33$$

With a score of 33 we see that 'Blandton' is indeed a Clone Town.



\*multiplying by 75 scales the index allowing us to give a 'Clone Town Britain' score between 0 and 100

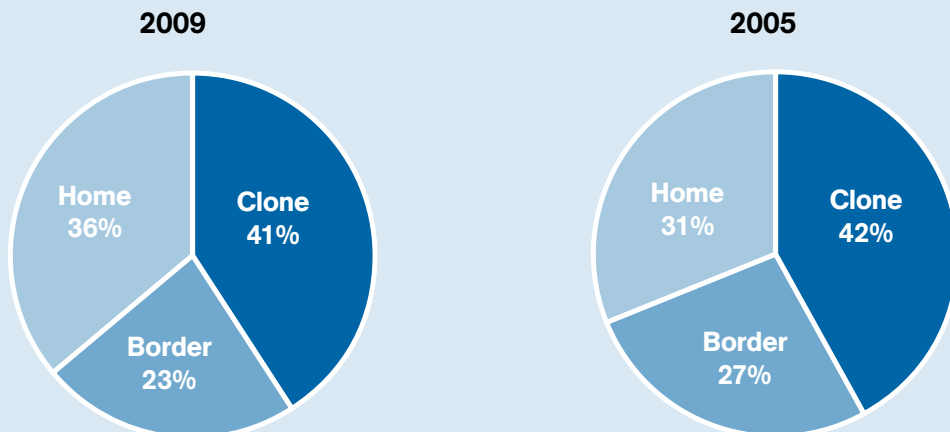
The Clone Town Britain Index measures both the identity and diversity of outlets on the core of the high street. It weights more for identity because ownership is critical to the health of the local economy and community. But diversity is important, and so is also included. Towns scoring below 50 on the scale are classified as Clone Towns. Over half of the stores counted are chains, and there is little diversity. Towns scoring over 65 are classified as Home Towns, where almost two thirds or more of the stores are independent, and there is a wide range of outlets. In between are 'Border Towns,' which are neither highly homogenised, nor strongly independent and diverse.

#### The Clone Town Survey results 2009

In 2009, we received 117 valid surveys from across the UK, 30 of which were of London villages. Of the 87 towns outside London, 12 were from the South West of England, 19 from the South East, 15 from the East of England, 12 from the Midlands and 18 from Northern England. Five surveys were received from Scotland and 6 from Wales.

Of the towns surveyed outside of London, 41 per cent were clone towns, 23 per cent border towns and 36 per cent were home towns. Of the London villages surveyed, 43 per cent were clone towns, 7 per cent border towns and 50 per cent were home towns. The town that reached the most extreme 'clone' score was Cambridge, managing only 11.6. The highest scoring home town was Whitstable scoring 92.1.

Figure 2: Clone Town scores 2009 versus 2005, excluding London





Despite the increased awareness of the loss of identity due to the spread of multiples since the publication of our *Clone Town Britain* report, and the many campaigns to save local shops, our 2009 results show very little change in the Cloned State-of-the-nation.

Our top ten clone towns come from all regions of the UK except the midlands and range from major conurbations to a smaller tourist town. Of the 15 towns outside London that were re-surveyed from 2005, only two changed status, both for the worse. The market town of Shirley in the West Midlands moved from a border to a clone town and Lewes in Sussex moved from a home to a border town.

There was an average of 16 different categories of shop, out of 26, on the high streets. Clone town high streets, unsurprisingly, displayed a smaller range of categories of shop, averaging only 14, whilst both home and border towns averaged 17 categories of shop.

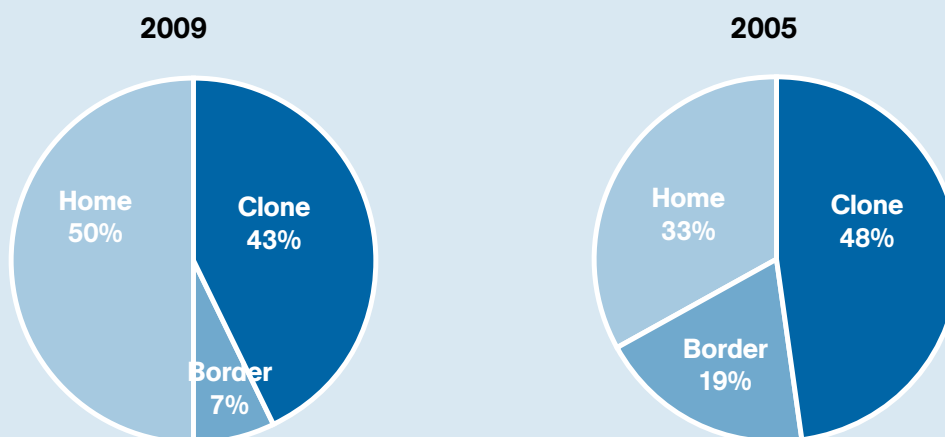
### London survey results

London showed a small improvement on the 2005 survey findings. Of the 30 London surveys, 13 were clone towns (a similar percentage to 2005), just two were border towns, and 15 were home towns, six more than our 2005 survey of 27 London villages, when there were just nine home towns.

The survey suggested West London's high streets are losing their identity more rapidly than other parts of London, and this trend will continue unless there is a concerted action to celebrate, cherish and create more unique areas. At the time of writing this report another blow was handed out to Portobello's famous street market as yet another unique arcade – The Good Fairy which housed 50 antique stalls – fell prey to bland development plans. In this case a bustling arcade is to be replaced by a five-storey retail and loft style apartment complex.<sup>31</sup> There appear few benefits to the local community and existing retailers besides an increase in the landlords' bank balances, whilst those elements which make this area so distinct and celebrated, for instance in the Great Street Awards 2009, are slowly but surely being eroded.

*"It is clear that Portobello Road's success does not lie in conventional public realm thinking but rather in its independent spirit. It works on three levels: acting as a focal point for local communities, providing goods for different needs and social levels, and as an international tourist attraction. Portobello Road reveals how real commitment to an already strong historic urban form, alongside an independent economic vision that continues to nurture future talent, has led to a powerful sense of place."*  
The Great Street Award 2009.<sup>32</sup>

Figure 3: Clone Town scores 2009 versus 2005 for London



Nine of the 13 West London villages were registered as clone towns. Richmond tops the table with just five independents counted on its high street, suggesting Conservative MP Zac Goldsmith will have his work cut out in his campaign to create a retail association to save local independents.

At the other end of the scale only Shepherd's Bush in addition to Brentford registered as a home town from West London. How long Shepherd's Bush's ethnically diverse Goldhawk Road, with 48 out of 52 shops classified as independent by our survey, can survive remains to be seen. The recession has neatly coincided with the opening of the largest urban area indoor shopping centre in Europe – 'Westfield London' – right next door, complete with over 250 chains stores.

Of the 18 London villages that were resurveyed from 2005, three worsened. Hampstead, Camden and Brixton all moved from border to clone status. There was better news on nearby 'hills', with Streatham Hill improving from a border to a home town and Muswell Hill from a clone to a border town.

## London survey results 2009

<b>South Richmond</b>	<b>19.5</b>
<b>East Putney</b>	<b>28.0</b>
<b>Hammersmith</b>	<b>30.0</b>
<b>Clapham</b>	<b>33.1</b>
<b>Hampstead</b>	<b>33.4</b>
<b>Wimbledon</b>	<b>35.7</b>
<b>Ealing</b>	<b>36.5</b>
<b>Putney</b>	<b>37.5</b>
<b>Camden</b>	<b>39.5</b>
<b>Twickenham</b>	<b>41.9</b>
<b>St Mary's</b>	<b>42.5</b>
<b>Chiswick</b>	<b>46.5</b>
<b>Brixton</b>	<b>50.5</b>
<b>Muswell Hill</b>	<b>57.5</b>
<b>East Sheen</b>	<b>61.0</b>
<b>Peckham</b>	<b>66.6</b>
<b>Stratford</b>	<b>67.3</b>
<b>Kentish Town</b>	<b>67.6</b>
<b>Highgate</b>	<b>68.4</b>
<b>West Hampstead</b>	<b>70.0</b>
<b>East Finchley</b>	<b>70.5</b>
<b>Upton Park</b>	<b>70.7</b>
<b>Borough</b>	<b>71.2</b>
<b>Streatham Hill</b>	<b>76.0</b>
<b>Finsbury Park</b>	<b>81.5</b>
<b>Wembley</b>	<b>81.5</b>
<b>Shoreditch</b>	<b>81.7</b>
<b>Shepherds Bush</b>	<b>83.2</b>
<b>Stoke Newington</b>	<b>84.2</b>
<b>Brentford</b>	<b>84.6</b>

# The clone towns

## Cambridge, south east England: number 1 clone

Dreaming spires, cobbled streets, gentle punting down the Cam river. These are the idyllic images of the East Anglian town of Cambridge. But it's a different story on the high street. Yoke together a world-renowned tourist destination, a massive new shopping mall, public transport funneling shoppers into an ever tighter core, university landlords focused on global academic excellence, and a very sudden collapse of credit and you have the perfect storm confronting independent retailers in Cambridge, the UK's most 'cloned' town centre.

While Cambridge University celebrates eight centuries of academic excellence and intellectual diversity, a bland homogeneity and encroaching vacant premises characterise the city's shopping centre. Lion Yard, Market Hill, Petty Cury and Sidney Street score a lowly 11.6 out of a possible 100 on our scale, putting Cambridge's centre one clone town point ahead of runners-up Reading and Exeter. Diversity is a stranger in Cambridge's clone zone; our pollsters counted a meagre nine varieties of shop (the lowest diversity score of all 128 of our surveys), with 25 of the 57 surveyed being clothing multiples. 2009 figures from the city council show around 40 vacant units in the historic city centre core and 30 more in and around 'The Grafton Centre' shopping centre, other retail parks and shopping streets.<sup>34</sup>

If things weren't looking bland enough, close to Lion Yard, a new 450,000 square feet of mall opened in March 2008, backed by Grosvenor Estates and the university's pension fund. The Grand Arcade's swish website claims:

*"We have combined classical heritage with cutting edge retail to create Cambridge's newest 21st Century style destination... Discover even bigger branches of favourite names like Topshop/Topman and River Island, as well as shops that are completely new to Cambridge like: Apple, The White Company, TM Lewin, Swarovski, Penhaligon's and LK Bennett."*<sup>35</sup>

Twelve months on, even after 'sweetheart' inducements, rumoured to include two-year long rent exemptions, empty retail units remained, along with a further 64 empty shop premises in Cambridge town centre.<sup>36</sup> Its occupied premises include at least two brands that have simply upped sticks from Lion Yard, leaving those spaces unoccupied.

We see signs of an even more dystopian future for the high street, unless a new way of re-focusing its traditional role as the main and most visible centre of community activity can be found. If future retail patterns are to remain at the mercy of corporate funding which is driven by expectations of ever increasing profit margins, the local high street will not survive.

The city's oldest, most important landlords are its two dozen or so colleges; from them, virtually all retailers in central Cambridge lease their premises. The colleges in turn constitute the university, itself one of the UK's biggest property owners.

Academic excellence does not come cheap. The university faces a challenge in fund-raising if it is to continue competing with the world's academic powerhouses. Independent Cambridge traders leasing college-owned premises may be suffering indirectly due to the consequences of this challenge. Advised to sell some assets at the peak of the property boom in the mid-2000s, the colleges are now compelled to levy higher rents on a now diminished property base. So, in the worst downturn since the 1930s, some are seeking rent rises of up to 50 per cent.

In 2008, wealthy St John's College sought such an increase from its tenant Frederick Tranter, trading from a prime site opposite the college's main gate. After 30 years, the long-established tobacconist decided he could not pay, and on Christmas Eve closed for good. Other independents have followed; more look likely to do so. A sympathetic local landlord recently wrote in the local newspaper of the dire situation he faced in trying to support local businesses by keeping rents down:

*"[...] the Valuation Office Agency seems to have had no such discretion and bumped my rateable value up from £7,000 a year to £11,000 a year, a 57 per cent increase... This hike in rates has coincided with the new Bradwell's Court coming on stream and the opening of the Grand Arcade; double the floor area chasing half as many customers as there were a year or two ago."*<sup>37</sup>

Small retailers are finding their voice. In 2008 they formed 'Independent Cambridge', a lobby group to engage with the multiples, landlords and other stakeholders, as well with the city council's 'Love Cambridge' retail promotion. The independents' chairwoman Vanessa Dowell, who runs her second-generation jewellery shop in Bridge Street, emphasises constructive dialogue with landlords, and stresses that independents have no inherent conflict with multiples; *"Sitting down with Marks & Spencer, Next and the rest, they will all tell you that we independents, just as much as the big boys, make Cambridge shopping what it is. But we still have increasing pressures, and we need to be heard"*.<sup>38</sup>

A booming regional hub for three decades, Cambridge's centre now looks to have become a victim of its own success. The frequent gridlock of Cambridge's ancient thoroughfares prompts the county council to run a 'Park and Ride' shuttle for shoppers from five satellite sites. But the Stagecoach-operated buses drop shoppers only in central hot spots like John Lewis. In consequence, according to Ms Dowell's research, shoppers' footfall falls away drastically outside the tight nexus of the city centre.

More intelligent management of traffic and pedestrian access may contribute a little towards a solution. Cambridge City Council has actively adopted the Sustainable Communities Act. One of the four policies adopted under the Act in March 2009 is to take much transport management – including the shuttle – back from the county.

### Shirley, West Midlands: from a border town to clone town

Two decades into a battle with their local council and superstore developers, independent traders and residents in Shirley, West Midlands, still find themselves questioning the latest development plans being exhibited to the public in June this year.

After one planning inquiry and a Compulsory Purchase Order, an end seemed in sight in November 2008, when a planning inspector approved revisions to a £100 million council-backed scheme. However, further adjustments, an expiry of planning consent and a name change for the scheme, sees residents in 2010 continuing to try to find ways to make this development work well for Shirley residents.

'Keep Shirley Alive', a defence group formed by local residents to protect the area's identity, welcomes an injection of new blood. But it says the scheme as approved is too big, piling corporate pressure onto struggling independents.

The re-named 'Parkgate' scheme<sup>39</sup> proposed by the developers Shirley Advance, a joint venture between Helical Bar plc and Coltham Developments Ltd,<sup>40</sup> now provides for a 500-short stay underground car park with an additional provision of 50 spaces for staff, and 138 dwellings in addition to an Asda and 20 retail units.<sup>41</sup>

According to the developer's website:

*"The inclusion of a major foodstore within Parkgate has been a key requirement for the regeneration of Shirley Town Centre throughout the course of the project. Asda will help to draw shoppers back into the central area; shoppers that are currently visiting the existing out-of-town stores."*<sup>42</sup>

An interesting argument to make in an area in which local opposition point out that seven supermarkets already exist in close vicinity. As yet, little evidence has been presented to verify how, direct employment aside, the spending in a supermarket directly benefits the local economy and supports the development of a thriving and diverse community.

Recent pressure on the community's economy has seen a rise in the number of retail vacancies. In our latest shops tally, the town has tipped from Border to Clone town status, with a score of 50.8. 'Keep Shirley Alive' claim that the development will siphon business away from their existing centre, turning a bustling suburb of Solihull with a strong community spirit into little more than a 'rat run' to the new units.

On the borders of Shirley Park, the development also proposes to build on three acres of green open space, effectively privatising an area that was formerly open to the public. Local protesters argue a smaller development, which would not takeover this green space, is possible and would like these alternative options to be fully considered.

At points in the saga, residents have questioned the borough's good faith in conducting its public consultations. Early announcements referred to an anchor food store being part of the development, which later became a superstore selling, by definition or default more than just food. In their own poll of 2,000 residents, 'Keep Shirley Alive' found that 87 per cent opposed the idea. Over the period of debating this development, commercial secrecy cloaking the council's dealings with a series of development partners has not reassured the group, giving rise to fears that the community could be saddled with a white elephant. On its website, the 'Keep Shirley Alive' group call for a new era of transparency.

*"The last decade has been dominated by claims of a 'done deal' with Asda, but a new era of openness and transparency could enable a new objective look at what it is possible to provide in terms of 'best value' for Shirley. The developers say that even if planning permission is granted they will not start work until the latter half of 2011, so there is time."*<sup>43</sup>

### **Exeter: princely landlords making hay, whilst the shops close**

Exeter has yielded to Cambridge the dubious honour it won in our 2005 report. Assessed against a different nationwide pool of towns, Exeter now ranks third, with a percentage score of only 15.4. Our volunteers counted only 14 types of store on its high street, out of a possible 26.

Natural topography has constricted and dictated the shape of Exeter's modern urban core, limiting territory for expansion. That did not stop UK property giant Land Securities opening the new Princess Hay shopping centre in 2007, with a stated investment of over £200 million and 390,000 square feet of retail space.<sup>44</sup> Its Mall, containing over 60 stores, supplements the older established Guildhall, Harlequins and St George's centres: the first of these houses one of the largest concentration of family-owned and independent stores in England.

In 2009, shop rental on a typical 20 year lease in Exeter's high street was around £220 to £240 per square foot, reportedly as high as in any regional centre outside London. With upwards-only rent reviews every five years, the city's stores report freeholders – in the main, pension funds – at present demanding rises of up to 30 per cent. Add on business rates equal to two-thirds of rents, and that

leaves the mid-sized branch of one greetings cards national chain store in Princess Hay needing to raise £500,000 a year, before paying staff wages and meeting other costs such as heat and light.

Occupancy rates in central Exeter have dipped in tune with the downturn. On and around the high street, four independents – including a long – established gift shop and a florist – are among those recently lost. Even new turnaround tenants in the cheaper lets are feeling the pinch. Foodeaze [sic] a delicatessen and cookery centre opened in St George's Hall late in 2007, and closed only eight weeks later. Among multiples in Exeter's malls, *New Look*, *Principles*, *Zavvi*, *USC* and *Barratt* lead the list of recent victims, concentrated heavily in the discretionary spending areas of apparel and footwear.

In 2009, tobacconist Martin McGahey was holding out as the high street's last independent shopkeeper, and was feeling the pressure. Since occupying a high street shop in 1955, close to where his forebear Edgar started the business in 1880, Mr McGahey observes his neighbours struggling. "We all rode the boom. But now there has to be fresh thinking about how we make it out of this recession."

On 16 December 2008, Exeter City Council formally adopted the Sustainable Communities Act, and submitted a proposal to give the Council the power to retain revenue from locally imposed non-domestic rates on store car parking spaces, with the power for the Council to allow discounts to stores that source at least 30 per cent of goods from within 30 miles of Exeter (and which are not first transported to a distribution centre more than 30 miles away).<sup>45</sup>

## The home towns

### Whitstable, south east: a port in a storm

Famous for its Oyster Festival and burgeoning food culture, Whitstable tops the list of our UK Home towns. A wide diversity of types of independent shops in the town, increasingly supplemented by a growing artistic community, is reflected in its score of 92.1.

Seafront views and a lively independent retail trade commanded price premiums in the north Kent town's property market. In recent years it has become popular as a destination for second-home owners. House prices have risen, contributing capital to sellers, but at the same time putting other locals' purchasing budgets under strain. So the viability of the wider community – including of its historic harbour – remain uncertain.

Whitstable's harbour is steeped in history. A working fishing port since the 18<sup>th</sup> century, it was one of the first towns to get a railway. But the port's South Quay, formerly a flourishing centre for employment and fishing, is now under-used and in need of renewal.

In 2005 Canterbury City Council, municipal owners of Whitstable's harbour, made public its intention to have South Quay redeveloped, and invited comments on a range of options. 300 people responded, overwhelmingly supporting marine-based employment and leisure activities, and rejecting housing or hotel facilities.

A pressure group, Whitstable Harbour Watch, was formed and quickly grew to 1,500 members. The group drew on deep suspicion between the city council and Whitstable residents. "Canterbury has no vision of a living identity for Whitstable beyond tourism and leisure", said WHW's Rita O'Brien in 2009. "The indifference and inertia we encounter from their councillors when we attempt dialogue, is something to behold".

In 2006 the council launched a second phase of its marketing. Inviting plans from developers, it suggested the 300 metre long stretch of dockside would be ideal for facilities such as housing, cinemas, restaurants and a public space. Three outline plans were tabled. Allied Land plc envisaged shop units with a supermarket at the end of the quay; townfolk suspected interest from Tesco. Kent brewers Shepherd Neame suggested a pub. Olympian Homes proposed housing and a restaurant with distinctive ramped access.

Whitstable Harbour Watch organised a petition opposing all the schemes. Nearly 18,000 people signed in opposition, half of them visitors to the town. In November 2008 the council's planners bowed to the protesters' will, rejecting all the schemes as unsuitable for South Quay. According to Peter Banbury of Harbour Watch, the town's folk remain anxious to put forward their own sustainable and creative alternatives for the site.

Interviewed in 2009, Peter highlighted the need to respond to changing times: "Conventional thinking has been to see towns like Whitstable only in terms of their past, exploiting this for tourism. To preserve a living community, we can challenge this view. Changing times demand that we do challenge it."

Instead of suggesting a number of particular buildings or facilities, Harbour Watch propose a series of values to underpin the development process, which include:<sup>46</sup>

- Celebrating local distinctiveness, building on the traditional imagination and inventiveness of Whitstable.
- Developing a local culture in which environmental, social and economic sustainability are co-dependent.
- Commit to the effective use of all its resources – human, material and economic – to ensure maximum effect with minimum means.
- Change things for the better, and not for the sake of change itself.
- Support the local independent businesses that give the town its diverse character and resist the blandness of corporate chains.
- Develop projects that benefit its residents and attract visitors, and do not consider one to the exclusion of the other.
- Continue to develop and adapt over time, in a process of continuous renewal.

### Crediton, south west: living in the shadow of the behemoth

Less than 10 miles from Exeter, the rural market town Crediton, benefits from a near-idyllic lifestyle – good community spirit, glorious Devon countryside and great shopping: an independent butcher, two bakers, two delicatessens and even a family-owned general store all serve the town centre as well as a monthly farmers market.

A rating of 84 from volunteer pollsters on our 100 point scale positions Crediton as one of the UK's home high streets. Included in that score is a heavy weighting for its diversity of shop types: the high street boasts 19 different types of outlet, out of a maximum possible 26.

The perfect spot to open a superstore, thought Tesco. Already with a small store in the town, in September 2008 Tesco won planning permission for a grocery barn, in-store café, petrol station and car park together covering 5,500 square metres – the size of a football pitch – all to rise on low-lying ground to the south of the town. At the end of 2009 the new store opened its doors, the eighth major supermarket within a radius of 15 miles. 450 car spaces are provided, testifying to Tesco's own estimates during initial submissions that the store will push 30 per cent more traffic at peak times along Crediton high street. A planning condition compels the store to

offer two hours free parking, in theory allowing shoppers to visit the high street. Yet that is more than 800 metres distant.

Section 106 crumbs dropped by Tesco as part of the development included an up to £2 million contribution towards a new link road, relieving the busy single-carriageway A377, already notorious for poor air quality; £300,000 for the bus companies; £15,000 towards railway station improvements. The new link must be built within ten years of planning approval, with an estimated cost of £8mn – the balance of funding having to be found from an ever tightening public purse.<sup>47</sup>

Although before the store opened, opinion among Crediton shopkeepers was divided, precedents for a big store's impact on the area's high streets are not good. Crediton's Transition Town campaigners warned Mid-Devon's district planners during submissions about the experience 12 miles away of just such an out-of-town development on Tiverton, where Tiverton's Chamber of Trade recorded a 30 percent drop in local trade.

After careful consideration, David Nation, a Crediton councillor on both town and district councils, voted in favour of Tesco's scheme on Mid Devon's planning committee, supporting his electorate's pleas for a bigger, closer supermarket, noting that the town centre's existing Somerfields (now a refurbished Morrisons) supermarket was heavily over-shopped, reputedly then being the chain's most profitable store in the UK.

Richard Adams, town councillor and third generation owner of Adams Hardware on Crediton, high street, said he believed the edge-of-town superstore would have a detrimental effect. "It'll offer shoppers a lot of their shopping under one roof. We will have to fight harder to attract custom".

Yet, as one local protestor wrote to the planning inquiry in March 2009, "If Tesco appears in Crediton, Crediton stands a good chance of rapidly developing into another Tesco town. The present atmosphere of a busy little market town is likely to change into one with a practically dead high street". In the mean time a strategy has been developed by the local Transition Town group Sustainable Crediton which included supporting thriving locally owned businesses and local shops. The Tesco development increased the challenge of achieving this.<sup>48</sup>

Linda Lever, a spokesperson for Sustainable Crediton, said "the high street is now very noticeably quieter. However, there are a great many people in the town who boycott Tesco, which is not nearly as busy as predicted. We are doing our best to promote local produce and retailers with our new website [www.creditonlocalproduce.co.uk](http://www.creditonlocalproduce.co.uk) launched at the recent, very well attended Crediton Food Festival."

## Skipton: the people's high street

Negotiating with a national chain store to pay for hanging flower baskets outside its store might not seem a major step in ensuring community resilience. But for Dave Parker, Chief Officer of Skipton Town Council in north Yorkshire, such small details have their place alongside big questions of commercial strategy. Caring for such tasks typifies his role, he believes, in managing relationships in one of Britain's most resilient rural communities.

Skipton's high street, commercial hub of the 14,000-strong market town, won the Academy of Urbanism's 'Great Street' award for 2009. Praising the street's sensitively maintained heritage and well maintained fabric, the Academy's judges singled out Skipton's well developed structures of local accountability, and "a high level of social and economic engagement, all contributing to a sense of vibrancy".

An active Chamber of Commerce, plus responsive relationships at three levels of government – town, district and county – favour strong *civic* engagement in Skipton's decision-making, according to Dave Parker. With the establishment of a town manager post in 2003, (initially funded in partnership by regional development



agency Yorkshire Forward, Craven District Council and Skipton's town council, and for the past three years funded entirely by the town council) answered a clear need to promote the town as a tourist destination, expanding its tradition of festivals and seasonal markets. But the role widened into one co-ordinating wider concerns of economic development and heritage preservation across the public and private sectors.

The lie of the land is Skipton's single biggest aid in defending itself from over-development. Located in spectacular countryside on the edge of a National Park, no large level plot exists for an out-of-town supermarket. Big chains like Morrisons, Tesco and Boots all serve the town. But they compete in the high street on the same scale as long-established family businesses.

Quirks of history and of land tenure strengthen the sense of civic belonging. Stalls in the four-day-a-week market pay rent not to the town council, but to the private owners of adjacent buildings.

"People can be very critical about changes in the town, but that shows they feel protective, that they love the place", said Dave.<sup>49</sup>

Signing up for the Sustainable Communities Act, Craven District council has recently committed to greater localised consultation. But traders in Skipton's centre had already blazed their own localism trail by forming a Business Improvement District (BID). Launched by the then Office of the Deputy Prime Minister in 2003, BIDs allow traders in a defined area to vote to add an extra 1 per cent on their own business rates for up to five years. A vote by businesses controlling 75 per cent of the rateable value in the BID zone has set up the venture.

The Chamber of Trade spent two years persuading its members to join the BID scheme which is expected to raise more than £500,000 over five years to be spent on further festival marketing, on improving car parking, and on better signage and street furniture.<sup>50</sup> "In a town that wants to attract visitors, appearances count a lot", said Dave.

Although the recession has had an impact on the area, the Woolworths site was quickly occupied by the Yorkshire Trading Company. The town's active management and network of commercial and personal relationships, shared goals for creating prosperity and decision-making gives it greater resilience than its neighbours.

## Brentford: community planning in action

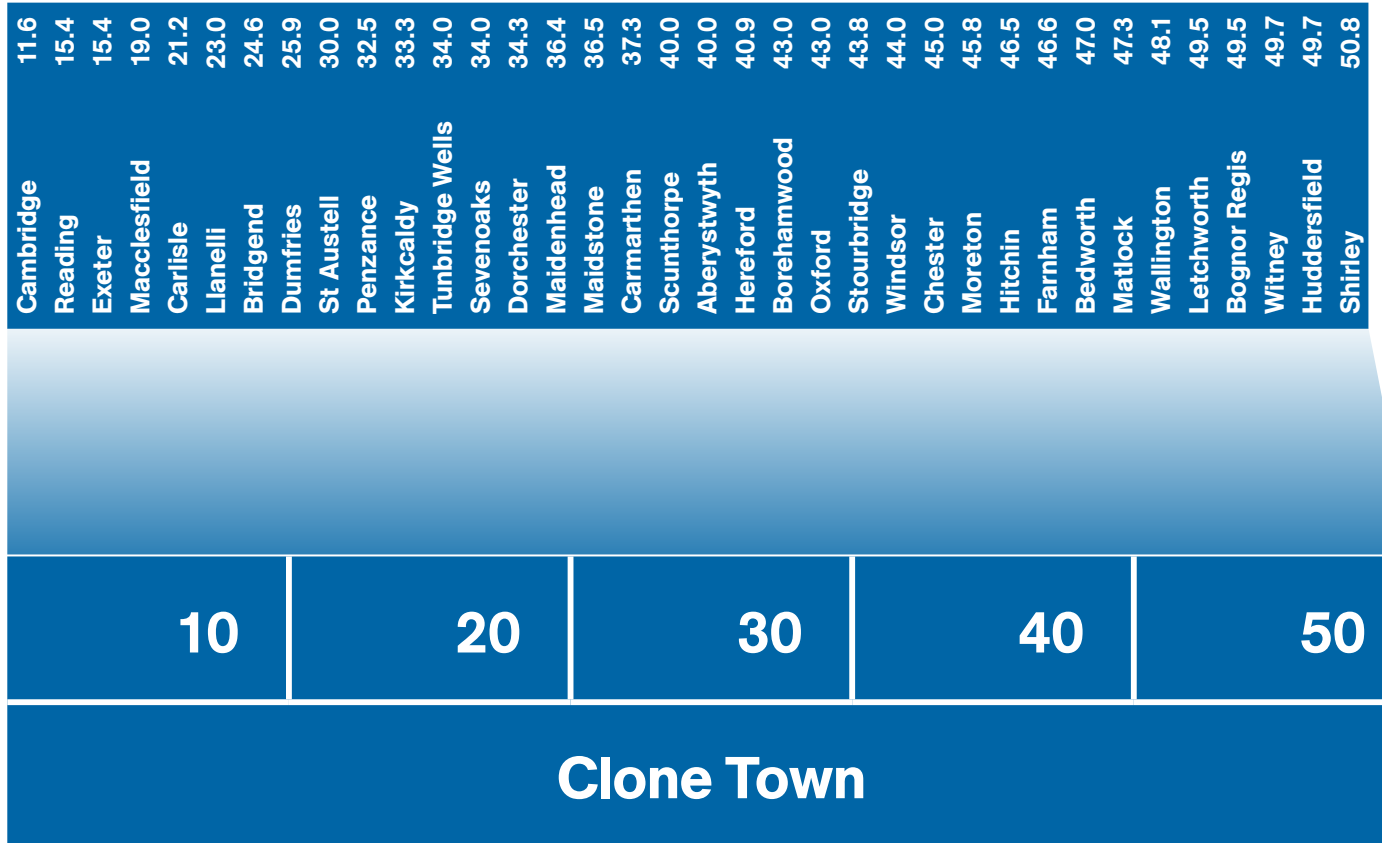
Brentford's rating as London's top home town, with a score of 84.6 among the capital's communities surveyed, does not mean it avoids serious, persistent challenges in regeneration. Yet the area's ambitious, community-based drive to secure social cohesion and prosperity offer a template for successful management of mid-tier urban centres elsewhere in the UK.

Upwards-only rent reviews for shopkeepers, and planning blight resulting from rumoured waves of development which have surfaced then vanished, are just two of the significant issues being confronted – and overcome by local people.

Few would ever accuse Brentford of being glamorous. With a historic decline in light industry, land use and housing under pressure and employment in flux, the challenges are acute. The high street is among London's most diverse: in the sample section our volunteers counted 19 types of shop, and only six national chains.

In recognition, councillors, residents and local businesses launched the Brentford high street Steering Group at a meeting in January 2007 attended by more than 150 people.<sup>51</sup> LB Hounslow's Community Investment Fund and **nef** both assisted then and afterwards. Together the project partners perfected local participation techniques based on **nef's** *HighStreet UK, Planning for Real approaches*, and Transition Town -style 'envisioning'.

# Clone Town 2009 National Results



**Border Town**

**Home Town**

Weymouth	52
Prenton	52.7
Redruth	52.8
Stevenage	54
Leek	55.5
Market Harborough	56.6
Newmarket	57.1
Stowmarket	57.5
Heswall	57.5
West Bromwich	57.8
Woking	58.3
Gosforth	59.5
West Kirby	60.0
Ashbourne	60.3
Battle	61.3
Hove	61.8
Welwyn Garden City	61.9
Lewes	63.4
Kenilworth	64.0
Sherborne	64.1

Pottersbar	66.5
St Andrews	66.5
Haslemere	66.6
Penarth	67.3
Watford	67.6
Aylesbury	69.4
Winslow	70.4
Stranraer	71.3
St Albans	72.5
Whitley Bay	73.3
Skipton	74.5
Wem	75.8
New Brighton	76.3
Hoylake	76.5
Glastonbury	77.2
Ledbury	78.5
Swanage	80.0
St Leonards on sea	80.0
Watton	80.5
Berwick	81.8
Bangor	81.9
Horwich	82.3
Newlyn	82.8
Hadleigh	83.3
Alness	83.7
Hebden Bridge	83.7
Crediton	84.0
Torrington	85.1
Normanton	85.6
Shirebrook	91.1
Whitstable	92.1

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From day one, the widest possible consultation was a key priority for the Steering Group. Half a dozen sub-groups and workshops sprang up to harness the community's dynamism; over 100 individuals and local organisations are named on its statement of community vision, published in November 2007. Complementing official and governmental processes, this vision encompassed all aspects of the sustainable regeneration of the town centre, everything from land use, energy descent, and economic wellbeing, to differing 'liveability', priorities of youth, seniors and minority communities, and on to rents, street lighting and public safety. It resulted in 114 recommendations to assess developments by.<sup>52</sup>

The key to success, according to Andrew Dakers, ward councillor (2006-10) and a guiding light behind the group, is the community identifying a vision of a future that it wants for itself. Constantly in sight is "world-class sustainable development that is also financially deliverable". The group is supported on a cross-party basis.

Chief among issues addressed by Brentford's community problem-solving has been restoring economic viability, especially in retail. Late in 2005 Jersey-based company Geronimo Ltd purchased freeholds along one side of the high street, later completing more acquisitions to emerge as the centre's major landowner. Soon afterwards developer Ballymore Ltd's option to buy the site was revealed, once Geronimo had obtained planning permission for a major mixed use housing and retail development.

Other community groups may have chosen to confront the developers. Brentford's Steering Group sought dialogue instead. Representatives of Ballymore and Geronimo responded to invitations to attend all the workshops in 2007. In consequence the landowners reviewed the group's recommendations and provided written feedback on aspects of the proposed urban design approach. In a further effort to support the community, the landowners removed boards on some empty high street shops. With the economic downturn delaying redevelopment in 2009 they started making the units available again on short leases to help bring additional vitality back to the town centre, and by May 2010 they were nearly all reoccupied.

Three years on and the Steering Group has made a number of key interventions: introducing Christmas lights to the town centre, securing funding for a small car park to capture more passing trade, launching the Wedge Card loyalty card scheme, a town centre website and the town's first ever public event – a celebration of St George's Day – in the historic Market Place.

Unfortunately, due to a combination of the economic downturn and the developers standing down their development team, dialogue largely stalled, giving campaigners their one serious setback. In autumn 2009 however, a new collaborative approach emerged. With funding secured from Ballymore and the local area committee S106 fund, Ballymore and the High Street Steering Group commissioned a joint workshop and report from The Prince's Foundation for the Built Environment. The process worked through the complex urban design required for the site and provides the basis of a brief for the urban planner that will be hired to work up a planning application for the site.<sup>53</sup>

In the current economic downturn, upwards-only rent reviews are a major concern for the 50 or so independent high street traders who remain tenants of Hounslow borough. Responding to the local councillors approaches, borough officers are seeking flexible solutions and discussions are now progressing on redefining the rent frameworks. This would substitute lower turnover of tenants and reduced volatility of income in the medium-long term as a goal in place of maximising short term revenue. The proposed framework would consider the type of businesses that are missing from the retail mix when evaluating rental income potential and the marketing of vacant retail units.

## Part 3: Communities fighting back

*“Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it’s the only thing that ever has.”*

**Margaret Mead**

The current crisis offers a huge opportunity to re-imagine our towns and cities. We have been led to believe that there is only one way of doing things, that markets as currently manifested are immutable parts of some greater natural order. This system has eroded the individuality of our towns and cities, and robbed us of their civic identities.

The good news is that alternative models are evolving. Their defining characteristics are that they are human scale, rooted in their communities and encourage the human interactions that make life worthwhile.

### **Winning back where we live – from the grassroots up**

As a number of our home town case studies have shown, although the chains have continued to dominate our towns and cities, away from the high street, a myriad of local alternatives have been developing. As we take this opportunity to take stock, it is important that we identify and learn from examples of places that have managed to maintain their identity in the face of the power wielded by our largest chain retailers.

Some of our home town case studies demonstrate successful alternatives to the multiples’ dominance on the high street, and others continue to battle it. Since our last *Clone Town Report* new policies (in particular the Sustainable Communities Act) have offered opportunities for residents to take local action. In this section we highlight a range of examples which show that we can build more resilient local economies.

### **National campaigns to save local economies**

In the last couple of years a whole range of campaigns have sprung up defending the distinctiveness of our local economies and communities. There are too many to list here, but campaigns which have captured the national attention and supported local action include:

The Federation of Small Business’s (FSB) ‘Keep Trade Local’ Manifesto and Campaigning Roadshow which has travelled across the UK to raise awareness of the threat facing local businesses. The FSB has also developed Small Business Engagement Accords with Local authorities to help small businesses through the recession and continues to campaign to maintain a local post office network to *keep the high street alive and keep trade local*.<sup>54</sup>

The Evening Standard’s ‘Save our Small Shops Campaign’ puts pressure on London’s Mayors to help small businesses, in particular through using Section 106 agreements in new developments, and rallies broad support for distinctive high streets and independents.<sup>55</sup>

The Campaign for Real Ale’s (CAMRA) campaign to save British pubs, a voluntary organisation with over 100,000 members, has run successful campaigns such as the Community Pub Week, the Beer Drinkers and Pub Goers Charter, support for micro-breweries and the promotion of festivals and awards. In the run up to the election CAMRA signed up 650 election hopefuls to reform the ‘beer tie’ arrangements in the UK pubs industry, one of the key causes identified by CAMRA of high beer prices and wholesale pub closures.<sup>56</sup>

In June 2010 CAMRA put its considerable support behind a Parliamentary Bill by Nigel Adams, Conservative MP for Selby and Ainsty to help protect valued community pubs and other local services. The Protection of Local Services (Planning) Bill aims to give local councils in England the power to close loopholes in planning law which allow local services such as pubs, post offices, local shops and community centres to be demolished without the need to seek planning permission.

### **Brixton defends its small businesses and market**

Brixton's bustling street market, Caribbean food and culture and thriving music and arts scene have not, it appears, given it immunity to the clone town threat. Over half the stores surveyed on its high street are now chains, according to our 2009 survey, moving it from a border town in our 2005 survey to a clone town today. Next to the smart new tube station entrance there is the odd stall selling joss sticks and new age preachers advertising the worlds' imminent collapse, but behind them are the familiar facades of Sainsbury's Local, Vodaphone, WH Smith, Iceland, Boots and Footlocker.

Meanwhile, Brixton's landlords and property owners seem unconcerned about the distinctive future of the town centre. According to Philippe Castaing, a local restaurant entrepreneur and active Transition Town member, Brixton is one of the most expensive high streets in London in terms of commercial rent, a major barrier for independent businesses.

For Phillippe the answer is for the community to get a genuine stake in the future development of Brixton by purchasing land for themselves. He heads-up Brixton Green, a voluntary organisation now developing plans for a Community Land Trust (CLT) to be situated behind Brixton market. CLTs work by enabling occupiers to pay for the use of buildings and services at prices they can afford, while the value of land, subsidies, planning gain and other equity benefits are permanently locked in, on behalf of them and future occupiers, by the not-for-profit CLT. For Phillippe, the CLT model is the only way to enable small businesses to get a foothold in Brixton as most of the premises available are too large or too expensive. The CLT also provides the opportunity to turn Brixton in to a green 'hub' and centre for environmental innovation. Phillippe says:

*"The plan is to have a genuinely mixed use for the CLT, to provide and manage low cost and middle range housing, to have smaller workspaces for independent businesses, to have opportunities for retail but also training, education and to set up new kinds of green businesses like repair and recycling workshops. We also plan to have an anaerobic digestion plant on the road, so that the site will produce its own energy and do something useful with much of the organic waste we will get from the market."*

The challenge for CLTs has always been raising the capital to purchase land in urban areas which is much more expensive than in rural areas. Brixton Green plan to do this through a community share issue and Phillippe's initial research suggests the people of Brixton will be keen to find an alternative way of investing their savings than with discredited banks.

Phillippe's optimism in the Brixton community is well founded. Local residents, including the Friends of Brixton Market and traders themselves recently saw off a bid by developer, London Associated Properties, to turn the market into a 'West-end style shopping precinct full of high-end retail stores'.<sup>57</sup> In the face of massive local opposition, and falling prices for residential property, the developer announced in March that it would abandon its plans for redevelopment because of concerns over the future of its traders.<sup>58</sup>

The historic market, which has been running since the 1870s, now looks to be safe in the short-term. Campaigners welcomed the turnaround but remain concerned that London Associated Properties could change its mind if the economy picks up. They now plan to make demolition impossible by getting the site listed.

## Capturing local spending

Loyalty cards, long the preserve of large commercial organisations, such as international airlines in the form of 'air-miles', hotel chains or the supermarket giants who use loyalty cards to build massive databases' on consumer behaviour, tempt continued spending through discounts, and plan their just-in-time distribution systems.

However now a significant local-shop loyalty movement is growing in the UK, appealing to people's attachments to where they live and their desires to support their local shops and services, as much as the financial incentives on offer.

Penzance, the tenth highest-scoring Clone Town on our 2009 survey, launched a loyalty card in January 2009 following the collapse of chains stores Woolworths and Adams, as well as independent stores. Promoted in conjunction with the Federation of Small Business's 'Keep Trade Local' road show, the scheme attracted more than 2,500 shoppers on its launch and 50 local shops. Just two weeks later, the chief executive of Penwith District Council recommended to the full council that it should approve the use of £10,000 from existing budgets to cover the cost of extending the scheme to neighbouring Hayle and St Ives.<sup>59</sup>

One of the most successful local loyalty schemes has been the Wedgecard. It aims to revitalise communities by offering a reward to customers for shopping locally. Wedgecard also provides additional marketing and publicity for local shops who can put special offers in the fortnightly Wedgecard newsletter.

Starting with 80 shops around Bloomsbury in December 2006, the scheme has grown to 1,400 shops throughout London and has sold 30,000 cards to London customers through the internet, Business Improvement Districts (BIDS) and through shops themselves. Wedge is working in over 20 areas in London, and most recently launched in Kensington and Chelsea supported by the Borough Council, with 560 shops signing up to be part of the scheme in April 2010 .

Other, smaller schemes have had similar success. 'Haselmere Rewards' in Surrey, has over 20 shops signed up, has issued 4,500 cards and is run jointly with the Chamber of Trade.<sup>60</sup> Local currencies, such as the Totnes Pound<sup>61</sup> in Devon and Lewes Pound in Sussex, should have a similar beneficial effect for local shops and keep even more money circulating locally.

## Communities taking ownership

### Community Buy-Outs

The credit crunch and collapse in price of retail and home properties has suddenly created a window of opportunity for communities concerned about the collapse of their high streets. According to a recent article in *The Guardian*, there has been a sudden growth in Community buy-outs of pubs, petrol stations and local stores, with local people putting up their own money and taking a share in any profits.<sup>62</sup> In Hebden Bridge, the local authority, Calderdale Council, transferred ownership of the Town Hall to a residents group, Hebden Bridge Community Association Ltd on April 1 2010.<sup>63</sup> There has been a steady rise in the number of Community Land Trusts (CLTs) established in the UK. Cornwall CLT Limited (CCLT) is a charitable organisation established in 2007 to provide good quality affordable housing to meet local needs either directly or by assisting local community land trusts to become established. In the face of falling property prices landlords, who were previously reluctant to sell properties, are now reported to be accepting reasonable offers. Planning authorities have also become more reluctant to allow change of use applications, allowing landlords to cash in on higher returns from houses, particularly when faced by a sustained local campaign, according to Campaign group, the Pub is the Hub.

### Tewin Village Post Office, Hertfordshire<sup>64</sup>

In May 2007, after 150 years serving the local community, the post office and general store in the village of Tewin, Hertfordshire, closed. 150 people turned up to a meeting to discuss its closure and with advice from the Plunkett Foundation (ViRSA) the villagers formed an industrial and provident society to manage the shop. They received a grant of £12,000, took out a further £12,000 from a social

lender, Cooperative and Community Finance, and the villagers came up with the same amount through various fundraising schemes. Within nine months the post office was up and running again, after volunteers had pitched in to refit and redecorate the store. Now 60 rotating volunteers from the village run the post office, and an unused storeroom has been converted into a café and community area. Older people who would otherwise have had to rely on a very limited bus service to reach shops now have basic facilities at their doorstep.

#### Community-based business support

Putting in place appropriate, community-based enterprise support is key to helping a thriving local economy to emerge. **nef's** experience of supporting 34 communities to deliver enterprise support projects over the past 8 years has demonstrated that the core elements of an effective small business support approach should include: support being made available to all new and existing small businesses in the area, using a community-based coaching approach to support those businesses, which draws on local networks of support to assist entrepreneurs to break down barriers that stand in the way of their success.

#### Using policy to work for your community

Since the publication of **nef's** Clone Town Britain report in 2005, there have been some positive developments in planning and legislation, much of it driven by local communities and campaigners. A range of legislative powers now exist that provide communities with the power to reassert control over the way in which their local economies develop and build more sustainable communities.

### Box 4: St Leonards on Sea, East Sussex (home town)

St Leonards on Sea, which lies just to the west of its larger and more famous neighbour Hastings, was originally founded in Victorian times by the famous architect Decimus Burton – responsible for much of Bloomsbury – as an up-market seaside resort for the smart London set.

Like many English seaside resorts, St Leonards saw a down turn during the 1970's and 1980's as its traditional clientele chose foreign holidays over stays at English resorts. As a result, many of the hotels and guest houses closed or were turned into accommodation for relocated Social Security claimants or refugees. Local independent businesses closed across the main shopping streets of Kings Road, London Road, Norman Road and the seafront, and were replaced by charity or second-hand shops.

By the late-1990's, the Borough of Hastings and St Leonards had been recognised as an area of deprivation and the beginnings of a strategic regeneration strategy were put in place. In 2006, a programme funded by the Local Economic Growth Initiative saw a new ground-up approach to regeneration come into the area, with a number of enterprise-focused projects looking to encourage different business sectors within the town, such as tourism and hospitality, film and television, and social enterprises. Amongst these was a BizFizz business coaching project<sup>65</sup> which aims to support new and existing businesses specifically in areas of high deprivation, including Central St Leonards.

The BizFizz project almost immediately attracted a high level of demand to support new enterprises from the Central St Leonards area, coming as it did at a time when an increasing number of incomers from London were choosing to relocate to the area for a better quality of life, specifically attracted by the diversity and 'shabby-chic' quality of the area.

Within two years the BizFizz project had supported 140 clients from the St Leonards area alone, and a vibrant local network of support has developed for the local entrepreneurs. With the Central St Leonards shopping area having retained its traditional high street buildings, and with surviving long-standing businesses such as independent grocers, butchers and bakers, many people began to explore start-up retail opportunities. In Norman Road, which had a long-standing cluster of antique dealers, new businesses have been established offering retro and collectable furniture and clothing, home wares, gifts and many items made by local artists and crafts people.

Along the seafront and under Marine Court, a cluster of new galleries have opened around the Hastings Arts Forum, which was formed in 2003 to act as a voice for the large local artist community opened its own gallery in 2005. Café, textile gallery and gift shop Aardvark joined this cluster in 2008, receiving a joint runner-up award from Coast Magazine for best seaside café just six months after opening.



The challenge is to ensure that the opportunity presented by the recession and credit crunch for rethinking the way both developments are designed, and how existing local businesses are protected, is not missed.

### The Sustainable Communities Act

The most important new piece of legislation to emerge is the Sustainable Communities Act (SCA), which **nef** lobbied for, as part of the Local Works coalition of over 90 organisations. The Act, which became law on 23 October 2007, gives the government a legal duty to 'assist local authorities in promoting the sustainability of local communities'. Councils are invited to opt into using the Act and submit proposals to central government identifying changes which will help them promote the sustainability of local communities.

The scope of the Act is very broad, covering economic, social and environmental issues, and most importantly it does not limit the type of action that can be proposed, provided the action is within that broad scope. The Act very firmly focuses attention on what local people decide they need to promote the sustainability of their area. <sup>66</sup>

### Sustainable communities are defined in the Act as having four categories: <sup>67</sup>

1. Local economies, e.g. promoting local shops, local businesses, local public services and local jobs.
2. Environment, e.g. promoting local renewable energy, protecting green spaces.
3. Social inclusion, e.g. protecting local public services and alleviating fuel poverty and food poverty.
4. Democratic involvement, e.g. promoting local people participating in local decision making.

Local authorities (including county councils) can propose a transfer of specific monies and function from central to local control. Some examples of what the Act could be used for include:

- Keeping open essential community services like Post Offices.
- Promoting small businesses by increasing their rate relief.
- Forcing large out of town superstores to pay local domestic rates on their huge car parks.
- Promoting local renewable energy, e.g. by removing the restrictive barriers relating to the local grid.
- Promoting local food and other products, e.g. by giving rate relief to businesses that earn 50 per cent of their turnover from selling local food and goods.

This Act represents a powerhouse of possibilities for local communities to take back control of their local economies. In the first round of proposals, 200 were shortlisted and put before the Secretary of State for consideration.

### Devolving power and greater local democracy

In June 2009 the 'Local Democracy, Economic Development and Construction Bill' became law. Central to this legislation are new rights for citizens to have more information and influence over local decision making and the shaping and provision of local services, primarily through the use of participatory budgeting. The Act aims to strengthen local democracy, promote regional and local economic development and ensure fairness in construction contracts. The Act also involves a number of new 'duties' on local government including:

- A duty to promote democracy, stimulate local debate, improve democratic understanding and take-up of civic roles.

- A legal duty on local authorities to respond to petitions.
- Extending the 'duty to involve' so that local authorities ensure government bodies and agencies involve local people in their decision-making processes.
- A new duty on local authorities to prepare an assessment of the economic conditions in their area.<sup>68</sup>

To make them effective, these proposals will require a major shift in local democratic structures and practices. It is up to communities and local civil society groups to put pressure on local authorities and other statutory bodies to test the limits of this legislation.

### The Taylor Review

*The Taylor Review of Rural Economy and Affordable Housing*, which reported last year, argues for root and branch reform of the planning system which places the sustainability of rural areas at its heart.<sup>69</sup> Specific recommendations include:

- New planning policies to shift growth of market towns from bland housing estates to create instead new mixed-use neighbourhoods.
- New neighbourhoods and development of extensions to existing communities with the provision of shops and community facilities, workplaces and open spaces.
- A new 'community-led affordable housing' initiative for smaller rural communities.
- Flexible new planning rules to encourage village businesses.
- Planning policy (Planning Policy Statements and Planning Policy Guidance) should be reviewed as a whole to simplify and end conflicting messages over sustainable development to ensure economic, social and environmental factors are properly balanced.
- 'Tick box planning' based on a narrow range of sustainability criteria should be transformed into processes encouraging a long-term vision of what rural communities can and should be, to end the 'sustainability trap' in which villages deemed 'unsustainable' continue to decline.

Reacting to *The Taylor Review* a number of national organisations and groups concerned with the economic, social and environmental needs of the countryside joined together under the banner of the Rural Coalition. In October 2009 the Rural Coalition published their prospectus *The Future is Rural too*, which campaigns for reforms that will create a strong, confident and sustainable countryside. The prospectus calls for:

- Vibrant villages
- Thriving local economies
- Flourishing Towns
- Great local services
- Empowering communities

In the report the Rural Coalition writes:

*"Only if people in rural communities have ready access to local schools, local jobs, local shops and pubs and homes will they and their children thrive, and will the nation meet its environmental and economic needs."*

## Nine Meals from Anarchy

Clone towns have not just eroded the individuality of our towns and cities leaving them uniform and dull. The dynamic that they have been a part of has divided communities and, by luring us from active citizens into passive consumers, they have contributed to an erosion of our democracy. And, as we face the additional challenges of climate change and peak oil, we find that the cloning of our towns and cities has created a brittle infrastructure unable to respond to these challenges. Town and City centres do not develop in isolation: there is a bigger picture that contributes to the brittleness of our settlements.

Understanding this bigger picture is crucial to determining what antidotes are necessary to address Clone Town Britain, and what will support Britain's transformation towards a low carbon future.

The protestors blockade of fuel refineries and distribution depots which brought the country to a near standstill in 2000 revealed just how vulnerable reliance on a few very large chain retailers has left our local economies and communities. The fragile foundation of our over-reliance on oil and highly centralised distribution systems, lay starkly exposed. Another three days of protests, supermarket bosses claimed, would have left their shelves empty. We were, in effect, only nine meals from anarchy.<sup>70</sup>

In the final section of this report we are calling for communities to take action to transform their high streets to support a low carbon, high well-being future.

## Part 4. Re-imagining your local high street to support a low carbon, high well-being future

Town centres are still largely regarded as theatres of consumption or destinations to visit briefly. At **nef**, we believe that our town and city centres should be more than mere shopping catchment areas.

Jan Gehl is the Danish architect credited with transforming Copenhagen. Four times as many people now go to the centre of Copenhagen than in the past, an achievement realised by recognising that shopping should never be the main reason for coming into a city. *“If you asked people twenty years ago why they came into the city, they would have said it was to shop. But if you ask them today, they would say it was because they wanted to go into town”*.<sup>71</sup>

We need a different development logic, one which includes residents in the planning and delivery of schemes which intimately affect how they live, and recognises that public well-being is the over-arching success criteria, not merely growth of the retail sector.

There are many examples of ways in which urban spaces have already been, and are being, transformed. With a little imagination, our high streets could become places where we go to actively engage with other people in our communities; places where shopping is just one small part of a rich mix of activities including working, sharing, exchanging, playing and learning new skills. As the hub of our communities, the high street could become the place where we begin to build a more sustainable world. The current economic crisis offers a huge opportunity to take a long hard look at our high streets, and ask if they are really serving our needs.

### Reducing our environmental impact

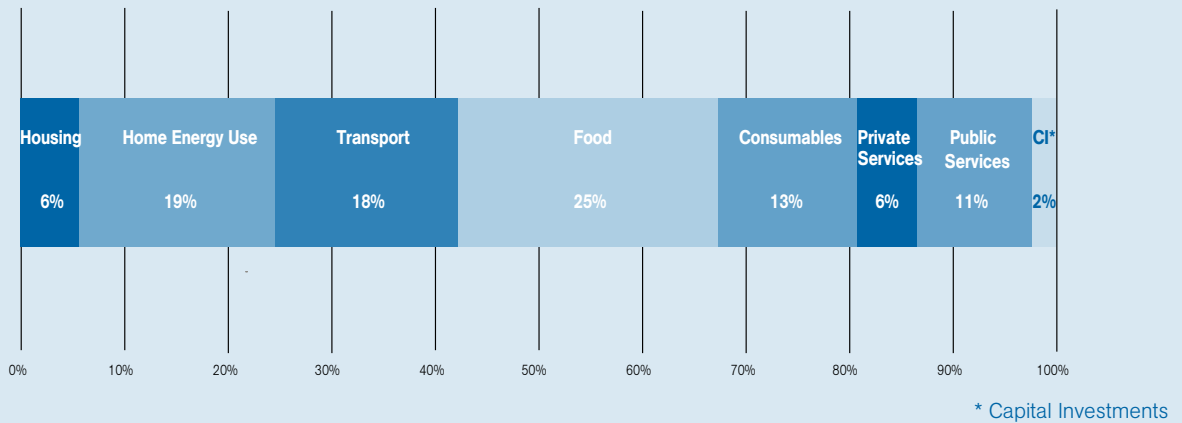
The ecological footprint,<sup>72</sup> the number of hectares required to provide each of us with food, clothing and other resources, of the average UK resident is 5.30 global hectares (Gha). Or put another way, the number of planets needed to sustain the whole world at the average UK level of consumption would be 3.1 planets. This compares with the average figures for the US of 9.5 Gha (5 planets), Germany 4.2 Gha (2.2 planets), China 2.1 Gha (1.2 planets), and with India and most African countries at 1.0 Gha or less (0.5 planets or less).<sup>73</sup>

In response to the challenge of climate change, the UK Government has set a carbon reduction target of 34 per cent below 1990 levels by 2020, increasing to an 80 per cent reduction by 2050. The CO<sub>2</sub> emissions (including embodied CO<sub>2</sub>) of the average UK resident is 12.08 tonnes,<sup>74</sup> which is broken down by sectors in Figure 4. To achieve our carbon reduction targets this has to be reduced to 4 tonnes per annum.<sup>75</sup>

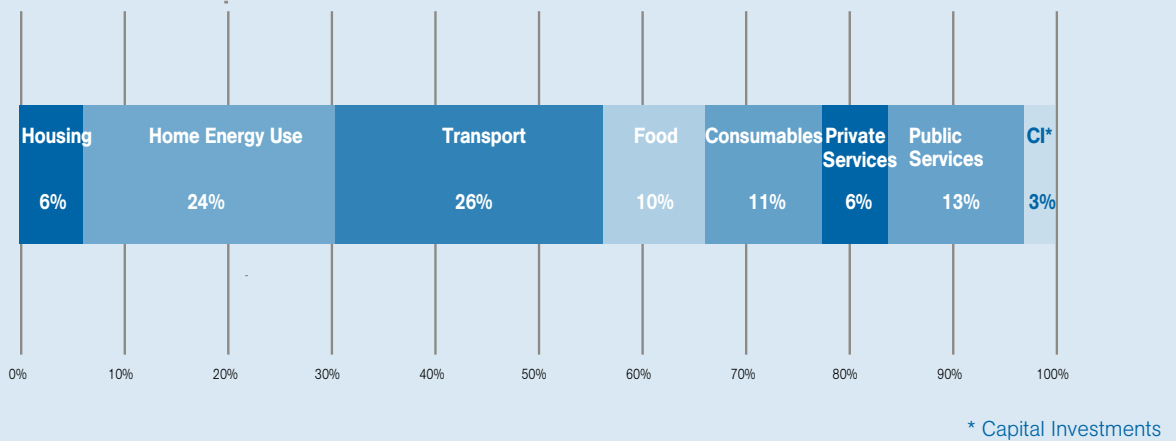
To achieve these levels of reduction will require us to re-engineer our economic system, not only at the global and national level, but most importantly at the levels most immediately felt by individuals, families and communities through the environment on their doorsteps, the goods and services that they produce and consume, and the sense of well-being experienced.

Combating climate change locally will require both adaptation and resilience characteristics to be designed into the structure of the economy. Adaptation to climate change, or resource scarcity, can be thought of as the long-term increase in the capacity to cope with changes in circumstances (e.g. unforeseen or periodic hazardous events). Adaptation at the regional and local level will require the ‘climate-proofing’ of infrastructure in such key areas as reducing the energy and

**Figure 4: Ecological Footprint of the average UK resident**



**Figure 5: CO<sub>2</sub> Emissions of the average UK resident**



resource intensity of our transport systems, waste management, energy and food systems. Inherent in adapting to climate change is the underlying need for us to consume less in absolute terms, and to re-localise the production of the goods and services that we do consume as much as possible.

Resilience can broadly be defined as the ability of a system (social, economic or ecological) to cope with external shocks as they arise. In measuring a system's resilience, the Tyndall Centre for Climate Change Research refers to indicators that demonstrate the system's "ability to (a) absorb shocks and retain its basic function, (b) self organise (social institutions and networks), and (c) innovate and learn in face of disturbances"<sup>76</sup>

Redesigning our high streets to support a low carbon future means ultimately displacing retail chains (as large users of carbon) and replacing them with locally-embedded alternatives on our high streets, with people using their local high streets more. Supporting the development of resilience characteristics will mean local people taking an active lead, in partnership with public and private agencies, in re-designing their high streets to be more sustainable and reflective of their local needs.

### Understanding Well-being

In 2008, **nef** was commissioned by the UK Government's Foresight Project on Mental Capital and Well-being to review the inter-disciplinary work of over 400 scientists from across the world. The aim was to identify a set of evidence-based actions to improve well-being, which individuals would be encouraged to build into their daily lives. **nef** identified social relationships, levels of physical activity, awareness, learning and reciprocity as key drivers of improved functioning and

Figure 6: Embedding the five ways to well-being in design



positive experiences. Of these key five drivers of personal well-being identified, both the strength of our social relationships and the extent to which we engage in reciprocal behaviour with others are directly related to the well-being of our communities.<sup>77</sup> There is growing evidence that the homogenisation of our towns and cities has undermined both of these critical aspects of our well-being.

Removing nature from our towns and cities undermines well-being and resilience. Contact with the natural world has benefits for mental health.<sup>78</sup> Green spaces have been shown to have positive benefits on social ties, mental health, physical health, economic resilience, play activity, and crime.<sup>79</sup> Research has found that green spaces (such as allotments, parks and gardens) and spaces near water are highly valued by people because they are relaxing and offer an escape from domestic pressures,<sup>80</sup> which supports the hypothesis that green space reduces mental fatigue, ensuring that we are more able to assess and deal with the issues we face in life.<sup>81</sup>

A landmark paper by behavioural Scientist Roger Ulrich published in *Science* in 1984<sup>82</sup> provided empirical evidence to support what we have long known instinctively. Ulrich found that patients recovered more quickly if their windows overlooked trees rather than a brick wall. Ulrich has since gathered considerable evidence that the restorative effects of nature scenes are felt within three to five minutes. Views of vegetation or garden-like features increase levels of positive feelings such as pleasantness and calm and reduce negatively toned emotions such as fear, anger, and sadness. In a series of experiments, people exposed to settings with plants and other nature had lower levels of fear and anger, and reported far higher levels of positive feelings than those with a view of the built environment.

Given the increasing understanding of the role that nature has in improving health

and reducing stress in hospitals, it follows that trees and plants would not only significantly improve the urban environment, they would play a role in reducing the stress of living and working in the city, and enhance personal and social well-being.

### **Time and the city**

Even if we allow for the possibility of more nature in our towns, there is little opportunity to stop and take notice. The way that we have built our cities has exacerbated the tendency to live life at an ever-faster pace, where time is a commodity to be bought and sold, and leisure to be purchased. As the economy extracts ever-greater working hours, the evolution of the city has required that we travel ever further at an ever-faster pace. According to the UK Time Use Survey 2005, the average time spent in travelling in the UK is 6 per cent of our time in a 24 hour period, in a year equating to 22 days.

The speed of our travel, and the single-mindedness of our journeys has eroded the space for social interaction still further. One way to slow down would be if our towns and cities were more pleasant places to spend time in.

Using well-being as a design guide means opening up the public space on the high street to become more of an experience which links us to our community.

### **Transformation of our towns and cities**

Transformation of our towns and cities is already underway: from every corner of the country innovative, alternative models are emerging to fill the gaps left by the closure of large chains. Each new venture is as original as the people who imagine it, and in each a powerful antidote to the stupefying blandness of clone towns. They are built on the belief that we can shape the world around us, openness to different ways of thinking and active commitment to reshaping our communities. Whether consciously, or unconsciously many of them also demonstrate that we can meet the challenge of living within our environmental means.

There are other, small signs that the tide is turning. People are increasingly seeking out authentic music, craft clubs are springing up across the country, bread-baking courses are over-subscribed months in advance, and while analysts look to retail sales figures for signs of economic recovery, the real resurgence is underway in the skills that we are all rediscovering – skills that will equip us well for a more diverse and vibrant future.

### **Transition Towns: building a more resilient high street**

The Transition network is a remarkable example of a grassroots movement to re-imagine and re-design local economies so they are less dependent on the fossil-fuel intensive model of production and distribution that characterises Clone Towns. The aim of the Transition network is to equip communities for the dual challenges of climate change and peak oil, by building community resilience – which they define as an area's: *"ability to function indefinitely and to live within its limits, and be able to thrive for having done so."* <sup>85</sup>

### **Lewes Transition**

The market town of Lewes in East Sussex is well known for its independent spirit. Its Guy Fawkes festivities, perhaps the biggest in the world, commemorate the burning of 17 Protestant martyrs during the Marian Persecutions of 1555-1557 in front of what is now the Town Hall. Until the mid-19th century these celebrations often spilt over into violent riots attracting significant police presence from London. Nowadays things are more peaceful at the seven Lewes bonfires.

Lewes ranked ninth best in our 2005 Clone Town Survey, reflecting its rich diversity of local retailers, a popular farmers market and its reputation as a place for good quality independent produce, drawing in visitors from around the South East. In the current survey Lewes has dropped from being a Home to a Border Town, with 21 out of 55 shops on the high street counted as chain stores (although some of these are small chains).

Adrienne Campbell, the local resident who conducted the survey and active Transition member, had some explanations.<sup>86</sup> A new Waitrose has led to a number of upmarket food shops and couple of health food shops going out of business. In addition it was felt that a draconian parking system run by the National Car Parks put in place five years ago has led to some independents closing down because shoppers are afraid of getting tickets. Previously there was more fixed parking time available and the Chamber of Commerce is lobbying the district council to amend the scheme.

Adrienne was also concerned that some smaller and less expensive food shops have had to close as Lewes has become more upmarket and more expensive precisely because it is *not* a clone town and attracts wealthy residents from nearby London:

*“These ‘Down from Londoners’ (DFLs) as they are known locally, have pushed up house prices and, because there are more wealthy people, shops have gone upmarket and some basic functional shops like foodshops have been replaced by shops selling useless stuff. And basic food shops can’t afford the rent here. A great little fruit and veg shop round the corner from me closed down and was replaced by a boutique because the owners wanted more rent.”*

If this story of chain encroachment and ‘boutique-isation’ is a familiar one, Lewes’s community response has certainly not been. Transition Town Lewes, which officially launched in April 2007, has been one of the most active Transition Initiatives in the UK.

The Lewes Pound, launched in September 2008, is a complementary currency, redeemable for goods or services offered by exactly the kind of local independent traders who are being squeezed out by competition from big chains, parking rules and high rents. It is not intended to replace sterling, being redeemable with it at one-to-one at three issuers in the town. But by using it, residents can help support local producers and traders and raise awareness of the importance of shopping locally. In the first issue, 30,000 Lewes Pounds were issued into circulation with the initial print-run of 10,000 selling out completely on the launch of the currency.

150 businesses in the town signed up to accept Lewes pound banknotes and to give them out in change to local shoppers. A number of stores are using the Lewes Pound as a way of boosting their marketing by offering discounts and deals for payment of goods in Lewes Pounds. The Lewes Pound Website keeps people up to date by listing current offers as well as guidance on how to use the note.<sup>87</sup> Other traders are paying their own suppliers and staff in Lewes Pounds, who in turn spend them with other Lewes businesses, thus creating a virtuous circle that benefits the town.

Oliver van Heel, one of the team that created the Lewes Pound, noted:

*“We wanted to give the Lewes community a reason to seek out and choose local traders. We didn’t expect to have a huge economic impact from the outset, but we have succeeded in raising awareness and starting a conversation within Lewes about the impact residents can have in stimulating the local economy.”*

The small-scale local solutions that already exist provide the sleeping architecture of a new system. If we choose to nurture and support grassroots initiatives and blossoming individual skills, we could create more convivial town centres, insulate against economic turmoil, enhance well-being, and support adaptation to climate change and the consequences of depleting fossil fuel oil reserves.



## Box 5: Low carbon high streets – focusing on transport and energy

To reduce carbon emissions from transport will require a reduction in overall traffic levels. For the high street, this raises questions of finding innovative ways of ensuring easy access, and reducing the need for car use. Some suggestions for doing this include:

**Vehicle speed restrictions in built-up areas.** For example, Hull has applied a 20mph speed limit in residential areas covering 26 per cent of the city. Limits are self-enforced through structural transformation of the roads. The restrictions dramatically reduced the number of serious injuries from road accidents and led to a £35 million saving in terms of physical damage from accidents. Applied consistently, speed restrictions are likely to reduce car use and make other transport modes, such as cycling and walking, more desirable.

**Promoting bicycle use.** There are a range of interventions that can support increasing bicycle use including road planning, cyclist-specific traffic lights, personal travel planning, information provision, as well as working with businesses to incentivise commuting by bicycle. It is also important to highlight the health and psychological well-being benefits of the physical activity involved in cycling. Research shows that whilst drivers perceive cycling to be inconvenient and stressful, cyclists themselves rate cycling to be just as convenient and far more relaxing than drivers rate driving to be.<sup>88</sup>

**Shared transport.** Where car transport is required – specifically when this is due to poor provision of public transport systems in rural areas – there should be encouragement of car-sharing schemes, and community transport initiatives.

**Shared streets.** The underlying concept of the shared street system is one of integration, with an emphasis on the community and the residential user. Pedestrians, children at play, bicyclists, parked cars, and moving cars all share the same street space. Even though it seems these uses conflict with one another, the physical design is such that drivers are placed in a position which requires them to exercise greater caution. Counter intuitively, this results in lower accident levels.<sup>89</sup>

### Reducing energy use

Forty per cent of UK carbon emissions come from buildings.<sup>90</sup> To address this on our high street we could:

- Display SMART meter readings in high street windows to monitor process, and support reducing energy use further.
- Reduce night lighting in buildings.
- Turn our buildings into energy generators through the use of solar panels and small wind turbines.

### Reclaiming Public Space

In Britain, town centre management tends to be a partnership between the public and private sectors, which encourages large retail developments, and as documented in this report leads to large soulless 'malls' (both indoor and out) full of chain stores. These developments are put together by property developers and local authorities using 'land assembly' powers and are justified as having economic benefits when seeking planning permission. In many cases, the land on which these malls are built was owned by local authorities and governed and managed under the democratic principles of the country. Once the malls are built they are in private hands and access to them is controlled by private owners. Everyday activities are forbidden – no selling of the Big Issue, no political activities, demonstrations and no photography.

Fighting back across the country there are groups of residents involved in campaigning against new and re-developments of their towns and cities, protecting what they see as important heritage and traditions.

People are most likely to look after spaces they perceive they have some control over or are a part of the heritage and traditions of where they live, such as market

## Box 6: Bringing nature back on to the high street

**Edible landscaping.** *Planting fruit trees and wild spaces to bring natural habits into community spaces.*

2009 was about food not flowers as more than a quarter of us experimented with growing our own fruit and vegetables.

Sales of flowers have declined, as sales of vegetable seeds have risen by 128 per cent from last year and ready-to-plant vegetables by 40 per cent. Sales of greenhouses are up by 157 per cent. Fruit trees are not only an untapped food source, but can be a way for groups of people to come together to organise urban harvests of fruit trees to pick fruit for household use and wider distribution, and for young people to learn about growing food.

Trees for Cities<sup>92</sup> has been transforming the asphalt spaces around a school in Islington, North London, into outdoor learning spaces incorporating fruit and nut trees, a woodland, as well as herb and more traditional vegetable beds that will provide fresh organic produce which the children can take home.

*“Vegetable gardens and outdoor classrooms like these engage children with nature and show them how rewarding it is to spend time outdoors, and they ably demonstrate where food comes from.”<sup>93</sup>*

places and village greens. Modern physical regeneration projects, such as Liverpool One, have created large, indiscriminate spaces. These spaces surrounding the shops they serve are rarely used as individual or communal space.<sup>91</sup> Residents are reduced to being mere consumers.

This is where the idea of the public realm plays such an important role, and why its erosion has been so socially and environmentally destructive. The public sphere is where residents learn what a shared, common resource is, and how to look after it without recourse to the taxes, fines, exemptions, rewards and general outside management that comes with privatised space.

### The Bigger Picture – no blue-print

There is no blue-print which guarantees the delivery of a low carbon future which supports high levels of well-being for all. **nef**'s experience of delivering action research projects to support communities to understand their local economies, and identify new opportunities for local enterprise has shown that initially people feel unable to effect change in their local economy – the economy is just something that happens to you. And the sheer scale of the climate change challenge can have the effect of multiplying this feeling until people feel powerless to change anything.

At **nef** we believe much can be done to create the policy environment and support for local action which will move us towards a low carbon future through experimenting locally, being bold with our vision for transformation, and building on the assets that already exist within the local area – local people's attitudes, skills and knowledge, physical, financial and natural resources.

Our experience of working on local economic development in the UK and internationally has demonstrated that supporting communities to explore practical ways they can effect change can be addressed by firstly presenting the issue in an understandable and engaging format, which then supports the identification of actions individuals and groups are passionate about taking forward.

### Well-being by design

The high street is so familiar that at times it can be difficult to imagine what an alternative model of a high street could look like. To help communities look at their high streets in a different way, we asked a number of community groups to use the Five Ways to Well-being as design criteria for re-developing their high street, and build a physical model of what that looks like (using easily found objects in the local area). In identifying possible ideas for action participants are asked to consider how those ideas help us to live within our environmental limits.



**The Five Ways to Well-being shop in Liverpool.**

**Connect...** finding time and the opportunity to connect with people around you

**Be Active...** physical activity can be encouraged by creating the space for it. This does not mean just sports facilities, but also green space to walk in, community allotments, and cycling pathways.

**Keep learning...** we can keep learning by promoting local history, opening space for public art, and learning new skills.

**Take notice...** unusual features will also make people stop and look, be curious.

**Give...** finding opportunities for people to share, exchange and help one another.<sup>94</sup>

Initial pilots<sup>95</sup> of design workshops based on the Five Ways to Well-being have demonstrated that activities which can emerge from this process are many and varied, from locally owned power generation, repair and recycling, reducing car travel, to local food sourcing, art and entertainment and supporting new local enterprise and retailing opportunities.

## Box 7: Designing a new high street

We used this approach to explore ideas with 120 children from Dewsbury as part of a Master planning process of their high street in 2010. The children, after working with their teacher the previous day to select a one of the Five Ways to Well-being they were going to explore in groups, they went around their high street to document buildings and streetscape.

In a workshop session they then were asked to consider what they would want in Dewsbury town centre in 10 years time, and to think about what changes to the local infrastructure would be necessary to develop a greater sense of well-being in local residents. Some of the ideas which emerged included a talent tower where we could be the best we could be, a gym for all ages, a museum shop and café, cycle track and a running track, allotments, sculptures and artists workshops, music venue, fruit trees and a swop shop.

We also worked with residents in Tooting, who used the workshop to re-imagine Tooting high street. Participants re-designed their high street using the Five ways to well-being and the ideas generated included, a Tooting Eden project, an outdoor gym, and outdoor cinema, a star gazing space, more people friendly streets and more greenery and trees.

### How well does your high street support your community to live better, use less and share more?

The Retail Age may be over for our town centres – what we need to do now is envision a mix of activities for our high streets, shops both interesting, basic, independent and multiple; community meeting places; studios where things can be made and painted and written, spaces where art can flourish and where children can play. Accepting this challenge, **nef** is launching through this report a new *Re-imagine your high street* programme to support communities across the UK to take action to transform their high streets.<sup>96</sup>

# Recommendations

This report contains a range of policy solutions and actions to transform our high streets:

## What you can do

### Take action

- Be Active, Take Notice and Connect with people around you to grow a thriving town centre for where you live.
- Use your independent cinema, local independent retailers and markets. Independent high street business can only survive if local people buy from them – seek out independents and locally sourced products.
- Join or help to create a local Transition Town group, or civic society.
- Get involved in running a local currency
- Use FreeCycle to redistribute your unwanted goods and belongings.
- Grow more of your own food.
- Run (or attend) a re-imagined high street project in your community. People need to help planners create a re-invigorated community – Government; (central or local) cannot deliver this alone.

## What local government and other public institutions can do

- Establish High Street Hubs in key vacant shops to accommodate activities that help develop local economic sustainability. These could range from local currency development (like Brixton £) to local food distribution and tool share/exchange schemes. NB. These are NOT general 'community centres'.
- Sign up to the Sustainable Communities Act
- Make residents an equal partner in your Master Planning processes
- Design well-being, distinctiveness and sustainability indicators into your Master Planning processes.
- Build in well-being measures in addition to sustainability into your procurement policies
- Support and help grow local Community Land Trusts
- Pursue the principles of Shared Space in your public space development
- Ensure resident participation in Business Improvement Districts

## What national government can do

- Roll out the Post Office Bank
- Develop a land registry of commercial property so we can understand who owns our town centres.
- Create an Empty Dwellings Management Order instrument for Local authorities to apply to empty builds to bring them back into active use for public benefit.
- Establish a Local Competition Ombudsman as recommended by the Competition Commission which will reign in the power of the big four grocery chains.
- Revising allotment legislation to encourage Local Authorities to provide more allotments, community gardens, community orchards or market gardens.
- Introduce an addition to the small business rate relief giving local authorities powers to offer discretionary business rate relief for new low carbon businesses moving on to the high street and to existing small and medium independent businesses who commit to reducing their carbon use.
- Introduce well-being indicators into all Planning Policy statements
- Introduce a Green Investment Bank

## Home Town or Clone Town?

The Clone Town Britain Survey II is designed to determine whether your town has become a Clone Town increasingly indistinguishable from dozens of others around the country; or whether it survives as a Home Town, distinctive and recognisable as a unique place.

The Clone Town Britain Survey II is simple. It should take no more than 30 minutes and can be completed while strolling along your local high street.

## How to do the Survey

### 1 The route

Start at the place you consider to be the heart of the high street of your town. To do the Survey you simply need to walk along the high street and record the first 50 shops you pass. Services such as post-offices, banks, benefit offices, job centres, doctors' surgeries and public buildings should not be counted. Ideally you should record 50 shops, but certainly no less than 40 and no more than 60.

### 2 Filling in the Survey

As you walk along the high street, fill in the form on the reverse side of this page. For each shop, you should note down:

- The type of shop
- Whether the shop is independently owned, or a part of regional, national or international chain.

The ownership of the shops on your high street is crucial to understanding its homeliness or 'cloneliness'. If you're not sure, go in and ask one of the staff.

### 3 The scoring

Once you have filled in the survey for 50 shops on your high street, you are ready to score your town and see whether it is, or is on its way to becoming, a clone town. This is determined by the number of different types of shops (i.e. diversity), and the number of chain stores versus independently owned shops (i.e. identity).

Follow the simple steps below to calculate your town's score:

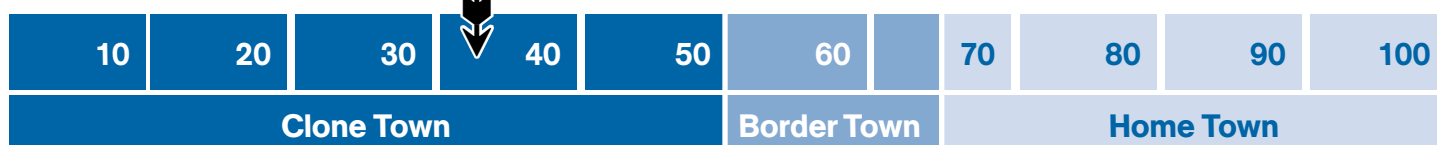
1. Add together the total number of types of shop on your high street.
2. Add together the total number of independently owned shops on your high street.
3. Multiply the total number of independently owned shops by 75, then divide this by the total number of shops.\*
4. Finally, add the total number of types of shop to this calculation. This gives your 'Clone Town Britain' score.

## Example: 'Blandton'

A survey of 50 shops carried out on the high street of 'Blandton' found 18 different types of shops. It also revealed that, out of the 50 shops counted, 10 were independently owned and 40 were chains. 'Blandton' therefore received the following score:

$$\text{Clone Town Britain Score} = \frac{10 \text{ (no of independent stores)} \times 75 = 750}{50 \text{ (number of shops)}} = 15 + 18 \text{ (no of types of shop)} = 33$$

With a score of 33 we see that 'Blandton' is indeed a Clone Town.



\*multiplying by 75 scales the index allowing us to give a 'Clone Town Britain' score between 0 and 100

The Clone Town Britain Index measures both the identity and diversity of outlets on the core of the high street. It weights more for identity because ownership is critical to the health of the local economy and community. But diversity is important, and so is also included. Towns scoring below 50 on the scale are classified as Clone Towns. Over half of the stores counted are chains, and there is little diversity. Towns scoring over 65 are classified as Home Towns, where almost two thirds or more of the stores are independent, and there is a wide range of outlets. In between are 'Border Towns,' which are neither highly homogenised, nor strongly independent and diverse.

# Clone Town Britain Survey II

Town: \_\_\_\_\_ Name of high street: \_\_\_\_\_

## Shop Count

Type of shop	Independently owned	Chain store
1 Food retailer (butcher, baker, supermarket, etc.)		
2 Newsagents/tobacconists		
3 Stationery/books		
4 Department and catalogue stores		
5 Restaurant/takeaway/fast food/coffee shop		
6 Pub/bar		
7 Off licence		
8 Professional (insurance, accountancy, legal, etc.)		
9 Estate agents		
10 Health care shop/pharmacy		
11 Household items (furniture, kitchen, etc.)		
12 Clothing retailer (shoes, accessories, etc.)		
13 Cinema/theatre		
14 Electronic/IT (TVs, phones, computers, etc.)		
15 Pet shop/pet supplies/vets		
16 Barbers/hair salons/beauticians and cosmetics		
17 Toys/sports/cycling/outdoor leisure		
18 Mechanics/car accessories/petrol station		
19 Music/games/DVD/video (includes rentals)		
20 DIY/builders' merchant		
21 Garden centre/florists		
22 Dry cleaning/laundrette		
23 Travel agents		
24 Camera/photo developing shops		
25 Post Office (please count a sub post office as independently owned, and Crown Post Offices as part of a chain)		
26 Other (betting shop, casino, taxis, antiques, watch repairers, charity shop, cobblers, jewellers, etc.)		
<b>TOTAL</b>		

No. of types of shop \_\_\_\_\_

No. of independently owned shops \_\_\_\_\_

Total no. of shops \_\_\_\_\_

(Ideally 50, but no less than 40 and no more than 60.)

### Clone Town Britain Score

$$\text{Clone Town Britain score} = \frac{\boxed{\phantom{000}}}{\boxed{\phantom{000}}} \frac{(\text{no of independent stores} \times 75)}{(\text{no. of shops})} + \boxed{\phantom{000}} \frac{(\text{no of types of shop})}{\boxed{\phantom{000}}} = \boxed{\phantom{000}}$$

## Clone Town Rating

10	20	30	40	50	60	70	80	90	100
<b>Clone Town</b>					<b>Border Town</b>		<b>Home Town</b>		

Please return completed surveys no later than 31 December 2007 to: Clone Town Britain Survey II, nef (the new economics foundation), 3 Jonathan Street, London SE11 5NH Fax: 020 7820 6301

# Endnotes

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# About the Connected Economies team



## Connected economies

Working with people to support practical local action for a just and sustainable future.

**nef** is working with people in communities in the UK and internationally to support practical local action for a more sustainable and just future.

We believe that enterprise and co-operation should be at the heart of all regeneration projects. Our action research programmes seek ways to support practical change in communities and influence local and national policy to create low carbon economies which support high levels of well-being for all.

In partnership with residents, local entrepreneurs and other stakeholders we:

- develop and support delivery of new models of local economic development and enterprise support;
- help people to reinvent their own economies, re-imagine their high streets and design their neighbourhoods;
- support increased understanding of economic, cultural and ecological interconnections that link communities, span the globe and impact on the future;
- support local authorities, NHS bodies and other statutory providers to procure and commission goods and services to create greater public benefit.

Our tools and approaches are available at [www.pluggingtheleaks.org](http://www.pluggingtheleaks.org) and [www.bizfizz.org.uk](http://www.bizfizz.org.uk)

For more information please call 020 7820 6300

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