

30 years of town centre change

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NATIONAL RETAIL PLANNING FORUM



Measuring 30 years of town centre change

Undeniably the spatial pattern of retail activity has changed in the last 30 or so years

Behind the headlines, often little more than anecdote - hard statistical evidence to allow comparison at the local level is much harder to find

Work at UCL sponsored by NRPF is trying to change this situation



A history of local retail statistics: Golden Age

Retail censuses in US, Denmark, Ireland etc from 1920s

Introduced in Great Britain post-war to inform economic planning - statutory obligation to complete return

1950 Census of Distribution

- turnover, employment, numbers of establishments
- results provided at local authority level
- broken down by trade category, type of business

1961 Census adds results for 272 central shopping areas in larger towns – interest from town planners & developers

1971 Census includes floorspace – the zenith of local retail statistics?

A history of local retail statistics: Dark Age

Census results slow to emerge - high inflation and local government change quickly rendered obsolete

Retail Inquiry from 1976 used VAT data, but collected at business level so no local output possible

Proposed 1981 Census of Shops cancelled – burden on business; cost to public purse etc

Some private sector alternatives did emerge, but without the comprehensiveness of coverage, consistency of method, affordability – 1971 Census data used into the 1980s and beyond

A history of local retail statistics: Renaissance?

Lack of information highlighted by 1994 Commons Select Committee on the Environment; Vitality & Viability etc

Led to DCLG/CASA Town Centre Statistics project:

- use existing data sources, Geographic Information Systems (GIS)
- produce robustly defined town centre boundaries
- employment, floorspace and turnover statistics

Floorspace & employment stats released for over 1000 English & Welsh town centres for 2000 and 2002

But no turnover figures

Intention of annual updates: data prepared for 1998 to 2005, still unreleased

Comparing 1971 Census with Town Centre Statistics

Both give floorspace and employment statistics with comprehensive coverage of England & Wales, but with differences...

...in what's measured

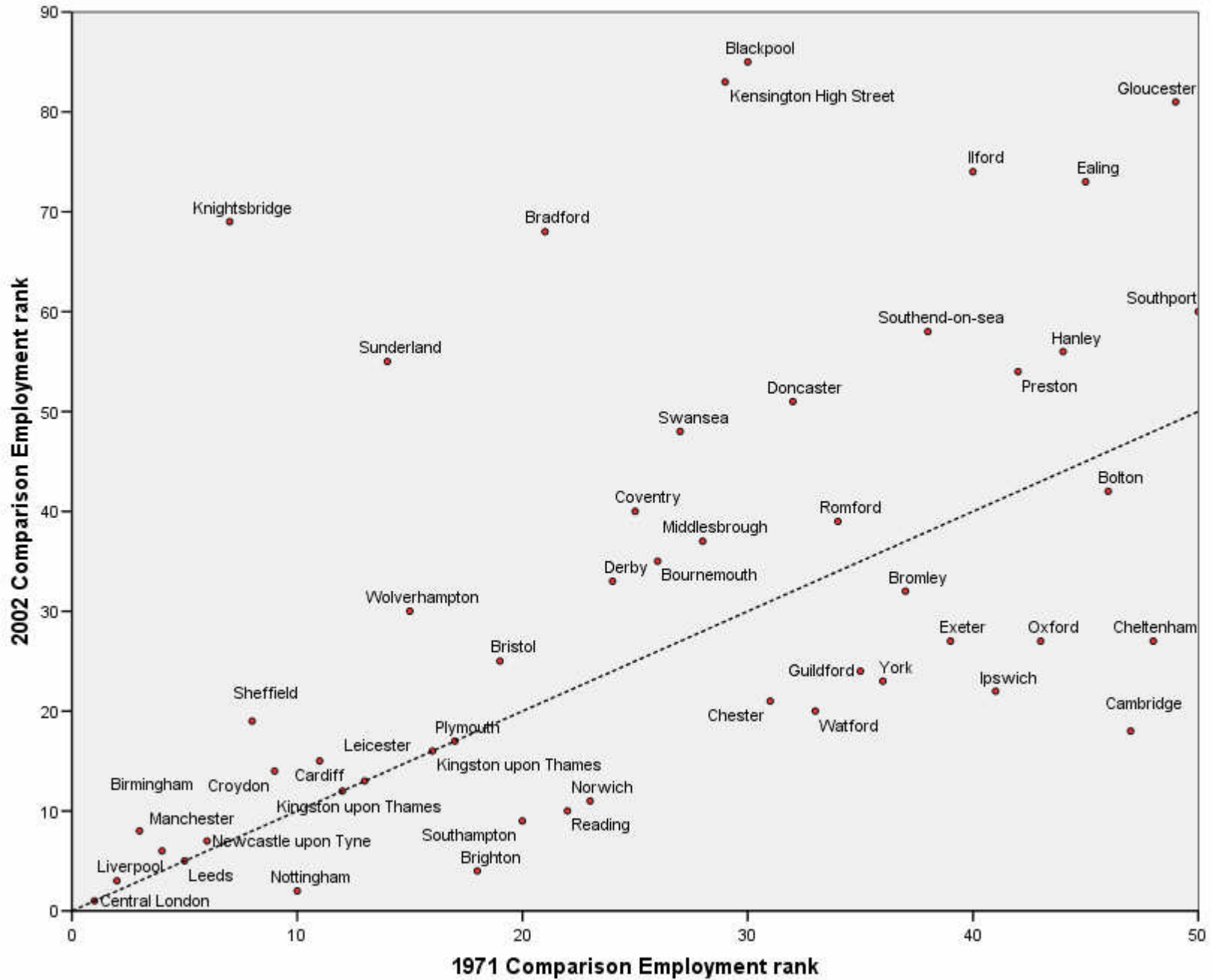
- no turnover in Town Centre Statistics (TCS)
- estimation within underlying data for TCS, especially employment
- TCS takes no account of whether employees full or part-time
- floorspace definitions
- different trade categories

...in the areas considered

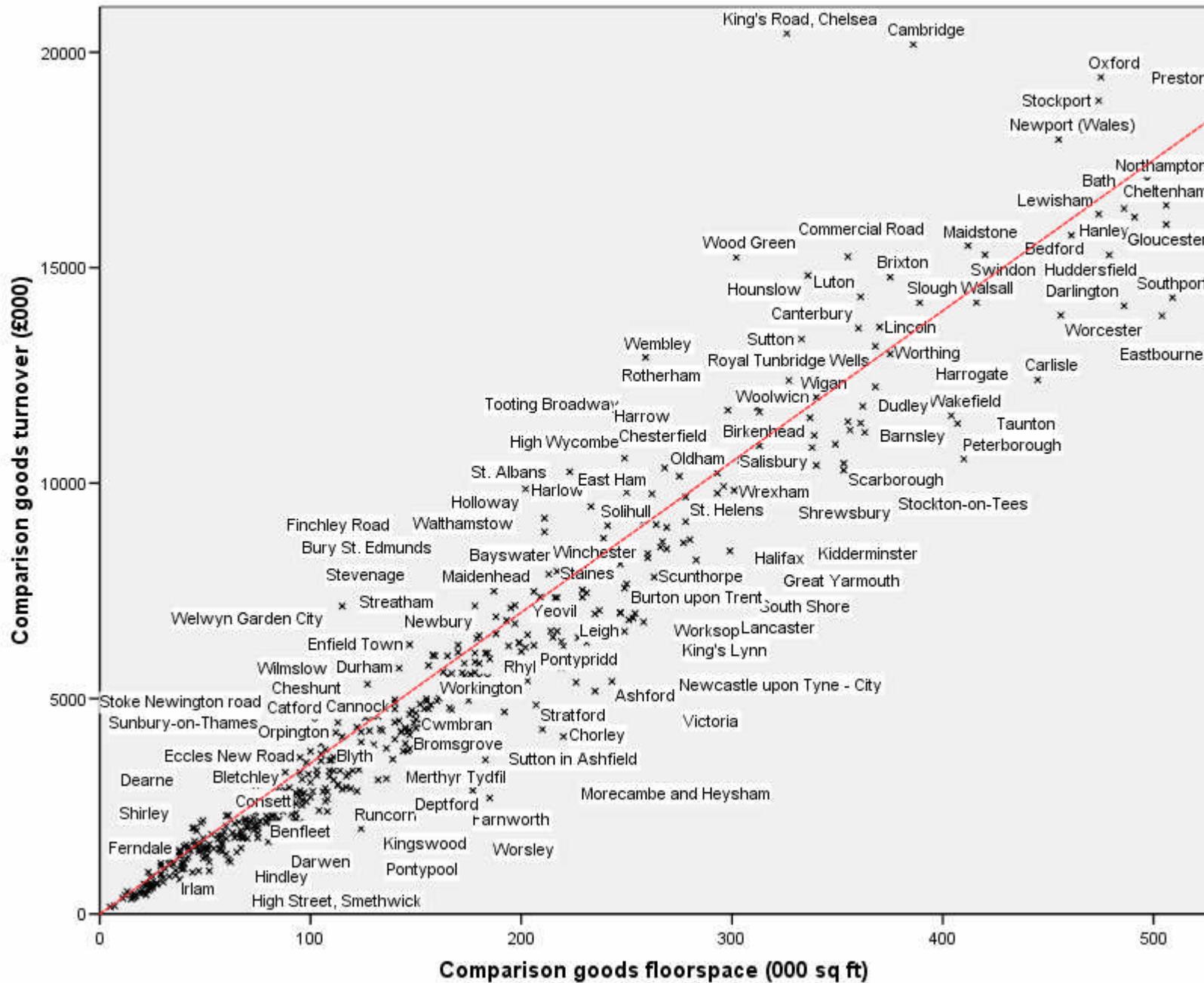
- subjectivity in choice & delineation of 1971 Census central areas
- other 1971 Census results for local authority areas rather than towns
- Town Centres rather than retail in TCS, so no out-of-town

...in media – needed to digitise 1971 Census

Changes in rank to 2002 for the 50 largest centres in 1971 for Comparison Retail Employment



1971 Comparisons goods turnover v floorspace for towns of below 500,000 sq ft



Shedding light on the Dark Age

This allows comparisons across a 30 year gap, but doesn't show what happened in between

What consistent datasets are available for the intervening years?

- No turnover data
- Employment data hard to obtain at local level by sector, especially for earlier years
- Floorspace – a golden thread? No, but there is some data, e.g. Hillier Parker Shopping Centre Master Lists – need to use with caution (e.g. no account of demolition)

Where next?

They're not perfect, but Town Centre Statistics finally enable an insight into changes in comparative performance of town centres over time, including a look back to the 1971 Census

Analysis of trends – e.g. regional effects

Incorporating other data – local sources e.g. floorspace from structure plans

Would be nice to have:

- 1971 central area boundaries – laborious to convert
- Modern non-centre retail data – easy to do, hard to get access

But will there be another 30 year gap?

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Those who cannot remember the past are condemned to repeat it

[George Santayana]

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