

Remember, remember the 8th of November

Miles Davis looks back at a very forward-looking NRPF tenth anniversary event

The NRPF marked its tenth anniversary in 2005 with a major event looking to the future – ‘Retail Planning Policy: The Next 10 years’, held on 8th November at Local Government House in London. The large group of delegates attending the event came from local and national government, the retail and property industries, academia and beyond, and included many new faces.

Professor Cliff Guy of Cardiff University created a stir with a provocative keynote address aimed squarely at local authorities and drawing from his forthcoming book. Andrew Smith of Arlington Property Investors gave a succinct overview from the property industry perspective of trends in retail and, crucially, provided the supporting evidence. Rachel Griffith, Deputy Director of the Institute for Fiscal Studies, provided an economist’s insight on retail planning. Her approach comes from a very different angle compared with most retail planners, but the competition agenda is a major concern for government policy which no-one can afford to ignore.

There is more about Rachel’s work on page 5 of this newsletter, and all three presentations can be viewed on the NRPF website (at <http://www.nrpf.org>).

In a robust presentation, Tony Thompson, of the ODPM Planning Directorate, mounted a strong defence of PPS6: *Planning for Town Centres*, explaining how it fitted within the wider planning policy framework and differentiating it from previous guidance in its proactive, plan-led approach.

Robin Butler, founder of Chelsfield plc and now Director of Lend Lease, gave a personal and very animated view from a

large developer’s standpoint of how the job gets done. He highlighted the trend towards mixed-use urban developments and the economic cause. The value of office property has remained constant over the last 25 years in real terms while retail and especially residential property values have soared, so it is those uses which now make development worthwhile. Developers are enthusiastic for an open, partnership approach to working with local authorities to minimise costly delays.

Tesco’s Andy Lowe provided a picture of the experiences of this high-profile retailer in working within the changing policy framework, again emphasising the change in format and the preference for a partnership approach. Warwickshire’s Director of Planning and Transport, John Deegan, gave a candid view of the day-to-day challenges of implementing retail planning policy within local government. Too often retail planning gets caught between conflicting demands, with place-marketing and prestige, rather than retail, taking priority.

NRPF Research Group Chair Geoff Steeley raised several interesting issues for future retail planning strategy, especially for the oft-overlooked suburbs. In particular, the requirement to demonstrate quantitative need, apparently unique to retailing and a constant since the advent of the planning system in the 1940s, was also questioned.

The packed programme and large audience compelled NRPF and event Chair Chris Brearley to keep formal debate brisk, but there was much informal discussion, and feedback has been highly positive. There is more to follow, too; the Research Group is currently looking at future seminars and

events to allow for more discussion of the issues raised. ■

Miles Davis is an ESRC-funded PhD student working for the Centre for Advanced Spatial Analysis at University College London, and for the NRPF on retail trends.

NRPF membership update

Following the November Forum event, a number of new members have signed up to NRPF. These are:

- Asda;
- IKEA;
- The Co-op; and
- Westfield.

The NRPF did not set out to become a large-membership-type organisation, preferring to work closely with a limited number of key players ranged across the spectrum of the retail sector. It does not operate as a lobbying organisation, but aims instead to act as a neutral bridge between the retail sector and central and local government, and also to beaver away at improving the data and information base on which decisions are made. After ten years in existence, the NRPF Board feel that all these roles are just as important – something the content of this newsletter also demonstrates. Companies or organisations who are interested in finding out more about the work of the NRPF are very welcome to contact the NRPF Secretary, George Nicholson. E: Gnicho6499@aol.com ■

Retail Forum is the Newsletter of the **National Retail Planning Forum**, a registered charity promoting private-public sector understanding of planning’s impact on retailing through research, seminars, and conferences

The DTI Regional Road-Show – at a venue near you!

Friday 17th March saw the coming together in Melton Mowbray of over 40 local authority heads of planning from across the East Midlands to discuss regional retail strategy. Staged under the umbrella of the East Midlands Regional Assembly, the meeting received presentations from the British Retail Consortium (BRC), the Department of Trade and Industry (DTI), county and regional planners, and consultants DTZ Pieda, before discussing options for policy development.

One thing that generated considerable discussion was the basis of the floorspace projections in the DTZ report, *East Midlands Retail Capacity Assessment*, and the efficiency rate they were based on. This is the subject of a piece of work currently being undertaken by the NRPF Research Group.

David Fuhr, Assistant Director of the DTI Retail Unit, explained that the purpose of the DTI regional retail strategy is to generate a greater understanding of the role the retail sector plays, or can play, in contributing to regional economic performance. He hoped that initiatives such as the East Midlands event would foster closer and more co-ordinated relationships between the RDAs (regional development agencies), regional assemblies, retailers and other stakeholders. In turn, it is hoped that this will generate self-sustaining networks of information-sharing and best practice, as well as practical initiatives, all aimed at improving economic performance.

Retailing makes a major contribution to the economy of the UK. According to ONS statistics, the retail sector contribution to the regions' GVA (gross value added) ranged between 7.3 per cent (East Midlands, London) and 9.2 per cent (South West) and had a turnover of between £8.1 billion (North East) and £44.6 billion (London) in 2002. In addition, the retail sector employed between 112,227 people (North East) and 437,513 people (South East) in 2003, comprising between 9.0 per cent (South East) and 18.0 per cent (North East) of the regions' enterprises.

Following the publication of the Retail Strategy Group report in 2004, the DTI Retail Unit is currently working on setting up regional retail pilots to better engage retailers with the process of developing regional retail strategies. The lead RDA is currently SEEDA, which has undertaken to ensure that all RDAs (and regional assemblies) are aware of the DTI strategy and are playing an active role in information-gathering and building the network of regional stakeholders. The DTI, for its part, is working to ensure that the Government Offices for the Regions are on board.

The DTI is interested in receiving information on any existing policies/initiatives in the regions involving retail engagement with RDAs, business links, skills councils, chambers of commerce, and local strategic partnerships. For more information contact David Fuhr, Assistant Director, DTI Retail Unit. T: 020-7215 1266 or E: david.fuhr@dti.gsi.gov.uk ■

The announcement that PPG6 was to be reviewed some two years ago was met with a mixture of optimism and fear among major retailers. The optimism stemmed from a feeling that the policy position would become more relaxed. The fear came from those who worried that the hard line being taken against out-of-town retailing would continue, or even be strengthened.

Intensive lobbying of key government departments took place during the consultation period, and the draft of the replacement PPS6 document gave much encouragement to the optimists – including IKEA. The document stated:

- Town centre sites were not best suited to larger-format retailers.
- Out-of-centre sites could be considered if there were no better edge-of-centre or town centre sites.
- A retailer's 'business model' was a valid consideration in deciding whether any better edge-of-centre or town centre sites existed.
- Disaggregation was not expected of individual retailers.
- Extensions smaller than 5,000 square metres were exempt from the sequential test.

However, all of this promise was dissipated like a mirage by the final version of PPS6: *Planning for Town Centres*, which was radically different from the draft:

- Larger formats are now directed to town centres first. Edge-of-centre sites are only to be considered if sites in the town centre cannot be identified.
- Edge-of-centre sites should be well-connected to the centre.
- Out-of-centre sites should be 'close to the centre, and have a high likelihood of forming links with the centre'.
- The 'business model' is now used against retailers in the application of the sequential test. In considering whether sequentially preferable sites are suitable, retailers now have to consider if alternative business models to their own could make these sites work for them.
- All retailers have to show why disaggregation is not possible for them.
- Only extensions smaller than 200 square metres are exempt from the sequential test.

The bad news for the out-of-town brigade is that things are probably going

PPS6 – a retailer's perspective

PPS6: Planning for Town Centres is bad news for large-format retailers, says IKEA's Graham Sharp

to get even worse if what one hears about the long promised PPS6 companion documents is true.

As a retailer that is desperate to expand, how does IKEA view PPS6? Because we want to open new stores as quickly as possible, we have taken a decision to bend with the policy wind and seek to develop town centre sites. Our perception is that PPS6 makes it harder than ever for an out-of-centre site to gain consent, and that probably the best chance of such a site making it through is with a very strong regeneration case.

So, in order to work with PPS6 we need to find town centre sites. Even before the advent of PPS6, IKEA was looking for such opportunities. Despite a great deal of effort we have not found many. This is because of the following factors:

- Developers prefer traditional (which usually means smaller) town centre

retailers for their sites and schemes within town centres.

- Local authorities are nervous about the traffic implications of a large-format retailer within town centre environments.

- Many stakeholders do not actually want a large-format retailer in their town centre – this is because of concerns over the impact on existing traders, traffic concerns and parking issues.

- There are difficulties in reconciling the often diametrically opposing views of various interest groups on the issue of scheme design.

In London, the situation is even more difficult owing to the demands in the London Plan for major retailing to form part of mixed-use schemes, which should usually be housing-led.

The final problem in trying to bring a large-format retail operation such as IKEA's into town centres is cost. Every

compromise to our format (sorry – business model) results in higher costs. In town centres there are many additional costs resulting from compromises such as:

- multi-level trading;
- longer construction programmes;
- less-efficient building volumes;
- higher design demands;
- off-site 'back-up' facilities;
- intensive management of reduced parking; and
- off-site infrastructure costs.

IKEA is not happy with PPS6. It represents a tougher planning regime for large-format retailers than PPG6, and it places even greater emphasis on town centre sites, which are very hard to come by. The irony is that the most likely prospect of national retail policy changing is if large-format retailers are simply unable to find town centre sites and/or make such sites work. Watch this space! ■

Graham Sharp is IKEA Town Planning Manager.

Briefing Notes – a new way to probe the *Bibliography*

The NRPF has established an extensive knowledge base on retail planning, updated annually since 1998. The compilers of the *Bibliography of Retail Planning* realise that it can appear daunting at first glance: as it has expanded, it has also become more difficult to find the items sought, owing to the scale of the resource. So, to facilitate access, users will now be able to find topic studies, in the form of 'Retail Planning Briefing Notes', on the NRPF website.

Each Briefing Note will comprise a short listing of abstracted references, a list of useful websites, a list of researchers to contact, and a key findings section. The key findings section will provide a context for the references, giving some insights into the papers that have contributed to different parts of a specific debate and are based on original research. The first Briefing Note will be concerned



Farmers' markets – topic for the first Briefing Note

with farmers' markets and how they contribute to retail structure and town centre vitality. Other topics to be covered over the next few months include mixed-use developments, 'clone towns', neighbourhood retailing, food deserts, competition in food retailing, and the sequential approach.

Users can contact us (details on the right) to suggest other topics that would be of use to them. The website is intended as an interactive tool, so users are also invited to send in details

of other useful research they may be aware of or have been involved in.

The Briefing Notes are only one of the new features of the NRPF knowledge base for 2006. The annual listing for 2006 will be available at the end of April, along with a commentary. In addition, a new complete version of the *Bibliography of Retail Planning* will be available on the website, including all items published since 1998. As previously, this can be searched online by topic. Users can also access the updated Planner's Bookshelf, which lists 'must read' items for retail planning. ■

Anne Findlay and Leigh Sparks

- Anne Findlay and Leigh Sparks are the compilers of the NRPF *Bibliography of Retail Planning*. They can be contacted at the Institute for Retail Studies at the University of Stirling by e-mail on a.m.findlay@stir.ac.uk and Leigh.Sparks@stir.ac.uk

'Under-served markets' – where there's a will...

The Under-served Markets project aims to demonstrate how retail investment can act as a catalyst for regeneration in deprived areas, as **Jenny Dunford** explains

In the most disadvantaged communities, lack of economic opportunity underlies and exacerbates a range of social issues. The Under-served Markets project – a joint initiative between Business in the Community (BITC) and the ODPM – is seeking to promote and encourage the use of private sector investment, particularly retail investment, as a catalyst for regeneration in deprived areas.

Based on research by Experian, a short-list of 12 target areas has been drawn up, from which a number of practical pilot investment schemes will be selected. The key objective of the pilots will be to lever in the full value of inward investment and the benefits that can be brought by brand retail. These may include: improved access to quality, low-cost products; increased employment and training opportunities; local business development through supply, service and construction contracts; and a multiplier effect from strategic site selection that brings increased footfall to support existing traders and attract additional investment.

Since inception, the project has faced a number of challenges in bringing these pilots to fruition, not least in terms of the timescales involved in successful development. However, significant progress has been made in raising awareness of the role of retail in neighbourhood renewal and in addressing potential barriers. In a context of increasing concern over the relationship between independents and multiples, retail is perhaps no longer welcomed as the saviour that it once was. Increasingly, retailers must justify their 'licence-to-operate' through demonstrating and articulating the economic benefits that they bring to local communities. The recently revised PPS6 reaffirms the Government's

commitment to town centres and the sequential test, but, crucially, also includes new references to the need to focus particularly on deprived areas. The Under-served Markets project has worked closely with the Government to ensure that national policies align to support efforts to tackle disadvantage and regenerate deprived areas.

True partnership between the public and private sectors not only offers greater opportunities for the regeneration of deprived areas: retail is a nationally significant sector in employment terms, and yet the value of retail jobs is not always recognised. Work by Accessible Retail (the trade body representing the retail warehouse and superstore industry) and the Under-served Markets project aims to demonstrate the links between retail jobs and regeneration, promoting the benefits of retail employment in economic renewal.

By sponsoring Business in the Community's Employability Award in 2006, Accessible Retail will also promote recognition of companies that have effectively removed barriers to employment, resulting in disadvantaged people finding jobs. The sponsors of the project – some of the biggest names in retailing, as well as central and local government – see this work as an opportunity to develop a new replicable model that is potentially the calling card for entering new markets. ■

Jenny Dunford is Under-served Markets Programme Manager at BITC.

■ The NRPF is currently working with both the ODPM and BITC to develop a series of events to showcase progress later in the year. For further information on the project contact: Jenny Dunford, Programme Manager – Under-served Markets, Business in the Community. E: Jenny.dunford@bitc.org.uk

On 15th February 2006 the All-Party Parliamentary Small Shops Group released its report, *High Street Britain: 2015*. The report examined what commercial, political, social and regulatory factors might influence the shape of local retailing by 2015.

The main recommendations in the report are:

- Implement a moratorium on further mergers and take-overs until the Government has brought forward proposals to secure the diversity and vitality of the retail sector.
- Establish a retail regulator.
- Introduce a new requirement for all local authorities to adopt a retail strategy within their development plan.
- Develop regeneration units in all local authorities within the UK.
- Develop retail-focused regeneration units in all RDAs within the UK.
- Make revisions to the retail property market.

The report reveals that there are 184,695 different businesses operating 278,630 shops in the UK, which constitutes 11 per cent of all UK businesses. In rural England, retailing is the single largest employer, with 480,000 employees and owners, and provides 15.5 per cent of employment. The report highlights the critical importance of the supply chain to small retailers, and how it can greatly impact on the success or cessation of businesses in the future. There are also concerns about the future of the wholesale sector in its current form once small clients fall below a critical mass.

Stressing the wide-ranging nature of submissions, the BRC (British Retail Consortium) strongly supported the view that market competition is not the only enemy of small retailers. The report points out that the UK is the only country in Europe where upwards-only rent reviews, lengthy leases and a modified form of privity of contract co-exist. Property costs are thus the second biggest cost for retailers after wages, and they are currently rising much faster than sales growth.

Predicted outlook for 2015

Despite 5 per cent annual growth in the convenience market, non-affiliated independent convenience stores see a reduction in sales of about 5 per cent

HIGH STREET BRITAIN 2015

Alan Hallsworth on the political support that the small shops agenda has gained from the All-Party Parliamentary Small Shops Group report

annually. Since the year 2000, there has been a decline of 11 per cent in the number of independent retail operators. Around 2,000 independent convenience stores disappeared last year. Colin Finch of the National Federation of Retail Newsagents reported that between January 2005 and October 2005 around 700 newsagents went out of business. On a more optimistic note, the authors of the report feel that rural shops are more likely to survive, as long as they are able to draw from a stable supply chain and continue to adapt to changing consumer behaviour and lifestyles.

One of the concerns the report highlights is an adverse effect on both employment and entrepreneurship.

This, it suggests, will flow from a reduction in the number of people able to become self-employed via retail, which has been one of the most accessible sectors for entrepreneurs traditionally. The inquiry also heard about fears that money will be drained from local economies without the widespread existence of local businesses.

Overall conclusions

In respect of store types, the report's greatest concerns are over post offices, rural shops, pharmacies, forecourts, newsagents, convenience stores, off-licences and other specialist retailers with little control over their supply chain, especially in urban areas. The value of the

report – albeit that it is light on specific planning-related issues – is, in my view, the range of relevant issues subsumed under retail. In contrast to the prevailing Office of Fair Trading view, the market is not just about the economics of distribution. It is about lively, dynamic socially-relevant retailing that serves all the community. When we find food deserts we are finding market failure. Where access to food is poor, the health of the nation suffers. When rents rise, the independent shopkeeper sells out to the international fascia. ■

Professor Alan Hallsworth is Reader in Retail Management at the University of Surrey and a member of the All-Party Parliamentary Small Shops Group support staff.

Minding the gap

For years the 'productivity gap' – the UK's poor productivity performance compared with the US and other countries – has been a focus for government concern and policy-making, especially by the Treasury. The retail and wholesale sectors account for the largest proportion of this gap. Since the influential 1998 McKinsey study,¹ planning regulation has been blamed for holding back UK firms' investment and so lowering productivity.

Economist Dr Rachel Griffith is Deputy Director of the Institute for Fiscal Studies (IFS) and Fellow of the Advanced Institute of Management Research (AIM), both ESRC-funded institutes. With colleagues she is looking again at the retail productivity gap, going beyond the aggregate data used by McKinsey. Using econometric

analysis of several large micro-panel data sets on firm, store and individual household behaviour, the aim is to explore:

- Why does the gap exist?
- How important are differences in consumer behaviour?
- Do firms behave differently?
- Does government policy, such as planning regulations, have a large impact?

A presentation at last November's NRPf event generated so much interest and discussion that Rachel and IFS researcher Heike Harmgart kindly agreed to talk to the NRPf Research Group in January.

Retail is an area historically under-researched by economists, and this kind of work modelling behaviour at the micro level has only recently

become possible. The work is currently at an early stage and focuses on food retailing, especially by supermarkets. The team are keen to engage with retail planners and others with an interest in this area.

This is a very different perspective from the retail planning orthodoxy, but is highly relevant, with the Treasury's Barker Review of Land Use Planning and the Office of Fair Trading's proposed referral of the grocery supply market both concerned about the economic impact of the planning system.

The November event presentation is downloadable from the NRPf website. The January presentation to the Research Group is downloadable at <http://www.aimresearch.org/prperformance.html>, along with more information. ■

Note

¹ *Driving Productivity and Growth in the UK*. McKinsey Global Institute, 1998. Available online at <http://www.mckinsey.com/mgi/publications/uk.asp>

Research Group Report

A briefing on the latest work of the NRFP Research Group by **Michael Bach**

Linked trips

National planning policy has as its hypothesis that focusing development in a centre, and so clustering uses within walking distance of one another, facilitates linked or multi-purpose trips, and that this is beneficial to the vitality and viability of the centre, facilitates making a number of visits to shops and services in one place, produces centres that are accessible to all, reduces dependence on the car, and reduces the number and length of car trips.

This is in contrast to out-of-centre locations, where:

- there is a greater propensity to make single-purpose trips;
- the frequency of associated visits to town centre stores will be much less; and
- the out-of-centre store may include a range of local services, reducing the trade for such services in existing centres.

A scoping study explored various definitions of trip types, including linked trips/multi-purpose trips, but was inconclusive. Few studies have explored the above hypothesis, although there is research which throws light on the propensity to make linked trips and people's willingness to walk. The Research Group decided not to pursue the issue of whether town centres generate more multi-purpose/linked trips and whether this is beneficial for town centres, but instead to focus research effort on the transport issues.

Sales densities and forecasting retail floorspace needs

PSP6: *Planning for Town Centres* requires planning authorities at local and regional levels to forecast the amount of new retail floorspace they need to plan for over the next 10-15 years.

Based on recent experience of forecasting retail floorspace at regional

level, it became evident that one of the key assumptions for modelling future space requirements was the rate at which the sales density of existing retail floorspace was likely to change.

Since the mid-1980s, based on work done by URPI, it has been assumed that sales densities would increase at 1.5 per cent per annum for comparison shopping and at 0.15 per cent per annum for convenience goods. More recent work by Experian, reflecting the experience of the last 20 years, suggested that these figures are no longer appropriate, and that a range of 2-2.5 per cent per annum for comparison floorspace and a figure of 0.75 per cent per annum for convenience shopping reflect recent long-term trends.

The Research Group reviewed how the assumptions have been used over the last 25 years and assessed current practice. The main findings were:

- The URPI figures are no longer appropriate – they are too 'conservative'.
- Practice has already changed to using the new, higher figures.
- Rather than use a one-shot figure, a range was being used to test alternative assumptions.
- A new issue had emerged – the need for better regional and local figures for baseline sales densities.

The implications for practice are that planning authorities should:

- test a range of alternative assumptions for the rate of change in sales densities, perhaps focusing on a 2-2.5 per cent range, recognising that 'low' assumptions generate a need for new floorspace and that a 'high' one will promote re-use or redevelopment; and
- use baseline sales density assumptions that are specific to the region or, if possible, major centres – more work is needed to establish these. ■

Michael Bach is a member of NRFP Research Group.

BCSC launches major research on the future of retail property

The British Council of Shopping Centres (BCSC) has launched a major research project aimed at examining retail property trends. A series of in-depth research reports have been commissioned, looking into topical aspects of the retail market with a view to informing retailers, developers, investors and policy-makers about how the retail property sector is likely to change over the next ten years.

The 'Future of Retail Property' research will explore how trends in retail property are likely to have an impact on the sector – from conception to design of new projects, to planning, development, tenant-mix strategies, leasing, marketing and asset management. The 18-month research programme will comprise eight individual projects, each tackling a different aspect of the retail sector:

- on-line retailing;
- changing demographics;
- retail business models;
- the future of brands;
- future space needs of the market;
- in-town versus out-of-town retailing;
- modes of transport; and
- design of future shopping places.

A team has been assembled to manage the programme, including Dr Richard Barkham, Group Research Director at Grosvenor, Dr Yvonne Court of Cushman & Wakefield Healey & Baker, Dr Hayley Myers of the University of Surrey, and Kate Logan from the BCSC. The research will be carried out through 2006, with the final report being published in 2007.

Launching the project, Michael Green, Chief Executive of BCSC, said: 'We have a clear aim of developing a vision for the future of retail property in its widest sense. It is essential that we focus on the changing nature of our environment and the impact of future trends.' ■

■ Further information is available from Melanie Hopper. T: 020-7487 9191. E: Melanie.hopper@halogenuk.com. Or see the BCSC website at <http://www.bcsc.org.uk/research/forp>

'Edges' or 'the tyranny of the centre'

In terms of social, economic and environmental change, the non-central retail market is where it is at – and so an understanding of 'edges', both external and internal to the town, is crucial, says **Geoff Steeley**

Professor Richard Sennet, while delivering the recent RTPI Annual Lecture, explored the notion of the different roles of the 'edge' in creating and nurturing change. He promoted the view that it could even replace centrality as the driving force behind social and economic development in the town. It is an idea – although familiar to some – that is bound to raise debate about the justification for investment and plans often now rejected, but equally often unstoppable. We have been warned. What do we do?

Commerce and planning interact in places. Both necessarily have differing interests within them. Neither can achieve their aims without the other. It is of interest therefore to think clearly about what places are. Commerce approaches the idea of place in the context of catchments. Planning is constrained by jurisdiction. Commerce has no responsibility for catchment. It is what it is, and can be made – to some degree – to be what it wants to be. Planning has no responsibility for jurisdictions outside its boundaries – unless of course it has the political capability to co-operate with its neighbours. And there lies the rub.

Catchments are constantly evolving by competition, technological change and flux of perception, and nowhere more so than in their overlapping zones. Often the overlap is just that – the fuzzy termination of distant interests. Occasionally the overlap evolves to become a zone of intense competition. The overlap can be so dynamic that it develops as a new quasi-independent entity, whether in terms of a centrality or a culture or both, and can sometimes take over the dominance of wider realms.

Planning jurisdiction doesn't work like that. Boundaries are boundaries until the government says otherwise. It does so spasmodically in response to elections and ideologies. When neither are active or dominant, planning goes in for seemingly gentlemanly co-operation using regions and sub-regions, but with little clout.

So, how could retail planning deal with 'edges'? One way could be to identify catchment overlaps and test their sensitivity to investment in accessibility. Planning authorities and consultants both have capability to do this – local transport plans by the one and maybe models by the other. Where the sensitivity is found to be high, policy options and impacts need to be initiated, especially where cross-jurisdictional effects are identified.

Not all overlaps and 'edges' and policy options involve cross-jurisdictional issues. Many 'edges' are within the built-up areas themselves. What else are 'under-served' areas, growth zones, gentrification, sequential potential *et al.*? These are places where planning for real must concentrate. It is clearly the case that, for both commerce and planning, 'edges' can be more significant than 'centres', often being places of rapid change, for good or for ill.

Changing existing 'edges' is fraught with political tension, as retail planning so painfully reveals. This is often related to the obvious lack of relationship between proposed investment and the barely perceived flux of change occurring within a zone. Searching for such changes before retail investment is proposed needs to be more rigorously pursued. To do this requires the analyst to re-orientate thinking towards 'edges' and catchments, and to the spatial expression of trends in society and the economy. The simple templates of centrality and service levels will no longer satisfy. The implications of these types of changes are complex, causing old established hierarchies of place to give way to a suburban renaissance, as well as, and maybe instead of, sub-regional re-ordering.

The most important location for retail investment may – in terms of scale – be a centrality, but in terms of social, economic and environmental change, the non-central retail market is where it is at. Understanding 'edges', both external and internal to the town, is crucial. ■

Geoff Steeley is Chair of the NRPF Research Group.

Academy of Urbanism launched at RIBA

Launched at a packed dinner at the RIBA on 23rd February, the Academy of Urbanism is a new initiative aimed at promoting best practice in urbanism throughout the UK. The brainchild of architect John Thompson, the Academy has an Executive Committee comprising luminaries such as Ian Henderson, Tony Carey, Trevor Osborn, Tom Bloxham, Roger Madelin, David Lunts, David Taylor and Piers Gough. It is an invitation-only membership organisation. Members with a willingness not only to share their expertise but also to contribute financially to the Academy's activities – which include education and awards programmes – are being sought out. Further information, including an 18-point 'manifesto', is available online. ■

W: <http://www.academyofurbanism.org.uk> E: info@academyofurbanism.org

New European association of food markets

Leading retail indoor markets from the UK, France, Spain, Italy and Hungary came together at Boqueria market in Barcelona in January to create a new association aimed at promoting the markets sector. The key objective for the new association – which will operate under the name ‘Emporion’ – is to promote, modernise and defend traditional food markets as a model for the distribution of food. Promoting quality and diversity and recognising markets’ important social functions as meeting places and as expressions of an urban area’s identity also underpin the new association’s role.

The headquarters of the association are to be established in Barcelona,

where the secretariat will be based. Future meetings of Emporion are planned for Turin and Borough Market in London later this year.

As well as visiting the Boqueria and taking advantage of its food school, the Barcelona event also featured a tour of the city’s famed markets, a number of which are currently being upgraded – the subject of a 50 million euro budget underpinned by the City of Barcelona. ■

■ The National Association of British Market Authorities (NABMA) has just published its second report on retail markets, under the title *Future Prospects*. Copies of both reports are available online at <http://www.nabma.com>
E: nabma@nabma.com

Data and statistics update

ODPM town centres statistics

Town centre boundaries, floorspace and employment statistics are being generated for the years 1998-2004 and should be available for downloading from the ODPM website at <http://www.iggi.gov.uk/towncent/index.htm> shortly. This will allow changes over time to be analysed for the first time. Statistics will be available annually going forward. In late summer 2006 the town centre statistics will be linked to the ODPM’s forthcoming ‘State of the Cities’ data warehouse.

It has always been intended that the town centres statistics should include turnover data, but this was found to be problematic during the pilot work. Geofutures, who produce the town centre statistics for the ODPM, are now involved in a project using GIS techniques which might allow turnover to be more accurately modelled for towns.

NRPF Data Catalogue

The NRPF is taking over the ownership and running of the *Data Catalogue* from the Society of Property Researchers later in the spring. This will allow better integration with the main NRPF website, as well making the catalogue easier to use and providing an opportunity to give it a thorough overhaul. A commentary to the *Catalogue*, similar to that produced for the NRPF *Bibliography*, is also in preparation. The web address remains <http://www.sprweb.info/>

ESRC Town Centre Dynamics Project

The 1971 Census of Distribution is currently being digitised by the Centre for Data Digitisation and Analysis at Queen’s University of Belfast. Thanks are due to Grosvenor Group and the David Thorpe Fund for support.

NRPF website

Don’t forget to check the NRPF website, at <http://www.nrpf.org>, which is updated regularly.

Snooper, retail FORUM’s roving reporter and sampler of retail environments, on designing spaces with activity

Re-making Victoria



The mall as we know it is meant to be customer-friendly. It is clean and warm, serviced and safe. Some malls are mixed use, featuring not just shops and cafés. *Nice*, but often nasty. Markets and streets, on the other hand, are often *nasty* but nice. This isn’t only a matter of taste and convenience – it’s about their respective roles in the town. The market is a bit of the town – inside. The mall is often an inside-only aspect of the town.

Designers of new developments are beginning to pick up on these role and image issues. They are doing so by the way they create spaces – spaces *with* activity and not spaces *for* an activity. With the renewed focus on town centres, ‘easy build’ is having to be replaced with ‘adaptive recreation’. The complexity of land ownership, constricted site area and shape, and the almost Machiavellian processes of politics provide temptations to invest elsewhere or overcome the obstacles by creating the ‘massive’ and shoe-horning it into the ‘sequential’.

Few of us in the business are absolved from visiting Bressenden Place, the ODPM headquarters in Victoria. But while there, take a five-minute break and snoop around the new Land Securities development at the top end of Victoria Street – an ‘inside out’ mega-building. Startling sweeps of glass confront us, like a space-age ‘mole-a-saurus’ leaving its lair. This is one of London’s highest-density quarters, covered in blocks of post-war and later vintage. Yet new spaces and levels have been created in the fresh air (well, no cars anyway). The designers have re-orientated the buildings – replaced some and woven people into places, set stages for activities and events, and, of course, revitalised and added retailing. Multi-activity – yes; places to be – yes. If only Oxford Street could face up to these issues. If not, the Victorias of this world will take over. ■

