

MAYOR OF LONDON



SUPPORTED BY



High Streets for All Report

Authored by
We Made That
LSE Cities

Copyright
Greater London Authority
September 2017

Published by
Greater London Authority
City Hall
The Queen's Walk
More London
London SE1 2AA

Contact
Enquiries 020 7983 4823

Website
www.london.gov.uk

All photographs by Philipp Ebeling
unless otherwise stated

Drawings and diagrams copyright of
We Made That and LSE Cities

Unless otherwise indicated, the data for
this study is based on field and desk
survey work undertaken by We Made That
and LSE Cities in early 2017

© Crown Copyright and database right
2017. Ordnance Survey 100032216 GLA

CONTENTS

A. High Streets for All - Report

Executive Summary	6
Introduction	10
What is social value?	14
Why high streets?	16
London's changing high streets	18
What we know about high streets	20
Findings	22
Conclusions	36
Strategic case for intervention	40
Recommendations	42
Bibliography	62

This document is supported by an Evidence Base which details the methodology, literature review and in-depth findings of the study.

B. High Streets for All - Evidence Base (published separately)

1. Literature review
High streets
Social value
2. Methodology
Overall approach
3. High street selection
London's high streets
Indicators of change
4. Case study high streets
Burnt Oak
Lewisham High Street
Lower Clapton Road
5. Findings
Prosperity
People
Place
Social value in Burnt Oak
Social value in Lewisham
Social value in Lower Clapton
6. Evaluating social value
Evaluating social value on high streets

Appendices

User survey questions

Business survey questions

Bibliography

EXECUTIVE SUMMARY

This study takes one of the most commonplace and everyday experiences of the city – the high street – and explores its social value from the perspective of Londoners. Social value is most commonly understood to be made up of economic, social and environmental aspects. Together with existing knowledge and new primary research, the study uses this evidence to set out the strategic case for advocacy, intervention and investment in London's high streets.

Why high streets?

As well as being one of London's most characteristic urban features, high streets are the city's most common public asset: everybody has one. High streets are the places most Londoners can walk to or get the bus from, they provide common access points into London's cycle routes, bus and overground systems, and they are at once global and local – offering both everyday experience and opportunities for exchange from across the world.

London's high streets serve a wide range of Londoners in multiple and inclusive ways. They are highly social, diverse and accessible spaces, and have a crucial role in supporting social economic and environmental benefits across London's neighbourhoods.

Investing in London's high streets is an effective way to benefit all Londoners, and policy to support this investment will therefore be essential to delivering Good Growth for London.

London's changing high streets

London's high streets reflect wider processes of urban change. This research confirms that high streets are facing changes and a range of challenges, which can threaten the value they offer to Londoners. These include:

- Increased rates and complex regulations
- Housing pressures on commercial spaces
- Affordability pressures linked to rising property values
- Increased online retail as a share of total retail spending
- National-level policy changes and cuts to public services
- A lack of formal planning designation for high streets

Tackling these issues will be key to ensuring that London's streets thrive, and maximise their social value.

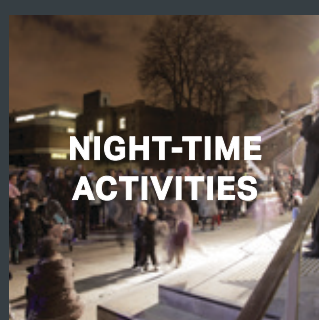
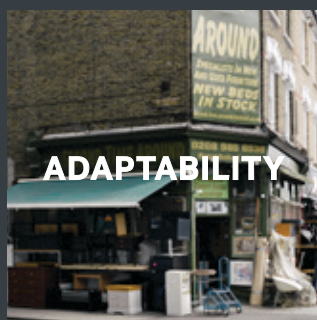
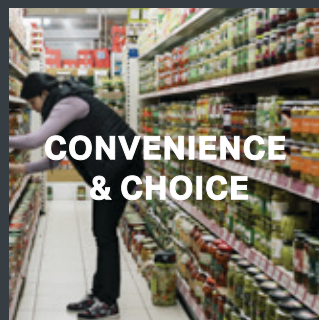
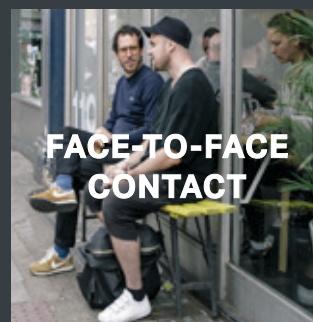
Overall approach

High streets are complex places. Getting an accurate picture therefore requires a mix of research methods that will uncover both their value and the challenges they face. This study draws on:

- Primary research through face-to-face surveys and interviews with over 200 businesses, high street visitors and other stakeholders;
- Observational analysis of high streets;
- Secondary research using GLA data, analysis and GIS data-sets;
- Literature review;
- Precedent analysis

THE VALUE OF HIGH STREETS

This research identified a wide range of high street functions that provide immense social value and should be protected and enhanced through policy, advocacy and investment:



KEY FINDINGS

These 10 key findings are based on mixed methods research which comprises a review of existing literature and surveys with over 200 businesses, high street visitors and stakeholders. The full findings are available in the Evidence Base, published separately.

- 1. High streets are significant and growing places of employment.** 47% of businesses outside Central London are on a high street and 1.45 million employees work on or within 200 metres of a high street, and this number is growing.
- 2. High streets offer local and accessible economic opportunities for an inclusive London.** Opportunities are highly varied, consisting of employment for marginalised Londoners as much as for highly skilled people seeking full-time employment.
- 3. High streets are social, promoting community and cultural exchange.** 45% of surveyed users' primary high street use was non-retail related – evidence that Londoners value the social exchanges that high streets support. This is especially important for vulnerable groups, particularly the elderly.
- 4. High streets are important gathering spaces for marginalised and under-represented groups.** Visitors to high streets include a significant proportion of job-seekers, elderly people, young people and recent immigrants. Our study tells us that 51% of visitors to high streets are not in employment, compared with 27% across London.
- 5. High streets provide crucial social infrastructure and social services for Londoners.** Both social infrastructure and shops often go beyond their 'formal' role by offering various forms of support and care to high street users. Almost 40% of small businesses interviewed performed some kind of social function.
- 6. Nearly 70% of London's high streets don't fall within a town centre boundary.** The majority of high streets have no formal policy designation and are potentially vulnerable to development pressures.
- 7. High streets provide a range of work spaces which can meet the needs both of newly formed and long-standing businesses.** The economic capacity of high streets is highly adaptive, catering to existing communities and newcomers alike.
- 8. High street businesses struggle to operate and to participate in collective efforts.** Nearly 70% of small businesses find rent to be unaffordable and many find collaboration with each other and local communities difficult due to multiple pressures including rates, sales, competition and time commitments.
- 9. High streets are local, walkable destinations and important points of connectivity.** 63% of surveyed users walk to the high street, showing they are accessible and promote healthier, more active modes of transport. High streets are also valued places of transit and connectivity providing access to places beyond the high street.
- 10. Processes of urban change are perceived acutely on London's high streets.** Londoners' perceptions of change on their local high streets can often be affected by a wider awareness of changes in their local borough and in London as a whole.

RECOMMENDATIONS

From the findings come the following 10 recommendations to help high street stakeholders deliver inclusive, shared and locally-responsive growth on London's high streets through policy, investment and advocacy:

1. **Take a strategic place-based approach**
2. **Promote citizen-led regeneration**
3. **Be inclusive by engaging harder to reach citizens**
4. **Protect diversity and choice**
5. **Recognise the social value of high street economies**
6. **Value the contribution of high street businesses**
7. **Champion high streets as social, civic and cultural infrastructure**
8. **Value high streets as sources of civic pride and local identity**
9. **Champion high streets as public spaces**
10. **Uphold an evidence-based approach to maximise social value**

INTRODUCTION

This study takes one of the most commonplace and everyday experiences of the city – the high street – and explores its social value from the perspective of Londoners. Social value is most commonly understood to be made up of economic, social and environmental aspects. Together with existing knowledge and new primary research, the study uses this evidence to set out the strategic case for advocacy, intervention and investment in London's high streets.

In 2016, the Mayor of London published 'A City For All Londoners', outlining the capital's top challenges and opportunities across priority policy areas, as well as the changes City Hall wants to deliver over the next four years to set out a renewed focus on social inclusion. This study is one of the first key pieces of work directly responding to this agenda and is relevant to work going on across the GLA. Findings from this study will inform updates of Mayoral strategies including the review of the London Plan, the Diversity and Inclusion Strategy and the Economic Development Strategy. They will also inform work around Mayoral priorities for public space, culture, social integration and Good Growth.

Through this study the GLA is seeking to better articulate and celebrate the value of London's high streets. In particular, the study responds to the following questions:

- What is the value of high streets for Londoners?
- What changes are high streets in London currently facing, and how do these affect the Londoners who use them?
- How can high streets and their regeneration be more inclusive and benefit all Londoners?

Although universal across the city, individual high streets are complex and distinct, and a mix of approaches is necessary to build up an accurate understanding of their diverse aspects. This study therefore uses a combination of quantitative and qualitative methods:

- primary research involving surveys and interviews with traders, high street visitors and other stakeholders
- observational analysis of high streets
- secondary research using GLA data analysis and GIS data sets
- review of existing literature.

The diverse nature of high streets – a multitude of different spaces, people and activities – puts them at risk of not having a clear constituency of support. While developers might advocate for the viability of a shopping centre, and residents may galvanise around a housing estate, there are fewer voices that speak for the high street. Where high streets are subsumed within town centres, in planning terms they are caught between this larger designation and its individual components – offices, shops, public buildings, open space. This study therefore aims to identify features of the high street that will allow policy and planning to relate more effectively to its diverse qualities and protect the values high streets create.

The study seeks to better understand both the current challenges London's high streets face, and the potential

KEY



Town Centre designation



Non-designated high street

opportunities resulting from recent social, economic and technological change. High streets are a litmus test for wider urban change. As well as looking across London's almost 600 high streets, close examination of three particular high streets has been used to capture the multitude of experience that every high street encompasses, drawing both quantitative and qualitative evidence from each street. The three high streets were chosen as case studies using a rigorous selection process. Looking at different

indicators of change affecting London's high streets, including demographics, house prices and physical change in the built environment, Burnt Oak in north west London, Lewisham High Street in south London and Lower Clapton Road in north east London were identified as being representative and robust for detailed, in-depth study (Figure 1). The full justification for the choice of high street case studies is included in the separate Evidence Base supporting this report, published separately.

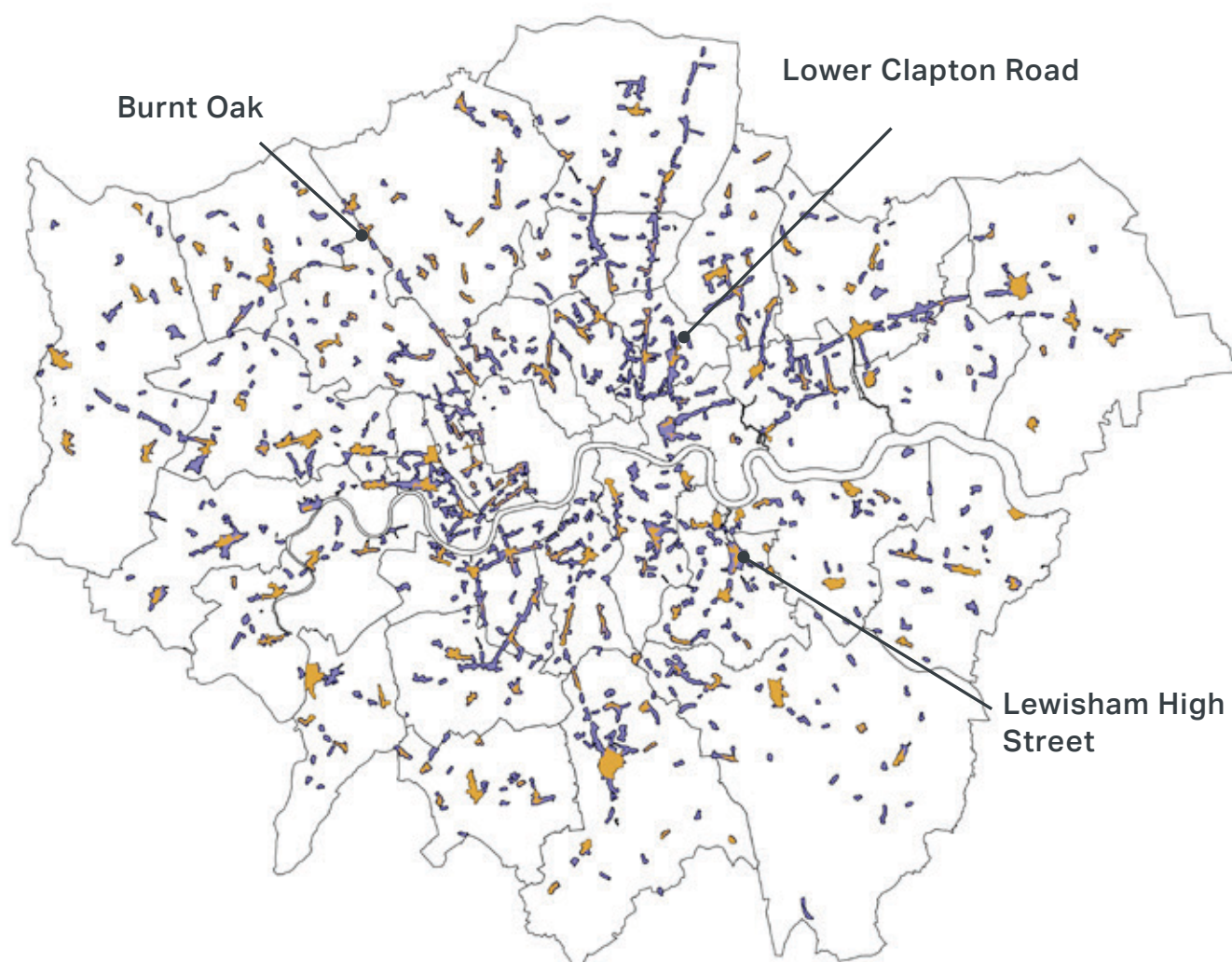


Fig 1. London's high streets, with our three selected case study high streets

The three selected high streets work together as a useful set to examine and understand the diverse forms London's high streets take, as well as the range of social facilities and services that these type of streets offer. The selection method used ensures that the three streets are diverse enough to capture different types and scales of social value, but representative enough to ensure findings can be understood at the London-wide level as part of the capital's network of high streets.

Social value – how it is experienced, offered, and measured – is the key concern informing this high street research.

The study provides a unique snapshot of the use, value and experience of change on London's high streets. The research has highlighted 'invisible' networks and data that need to be better captured and integrated into future policy and high street investment. The study has also developed a more nuanced understanding of the threats and changes that are affecting high streets, and offers recommendations to respond to these changes, particularly where they threaten the social value of high streets, in all its forms.

Contents of the report

This report begins with an introduction and explanation of social value and provides an overview of existing intelligence relating to high streets. Findings from the primary research conducted as part of this study are then explored as they relate to Prosperity

(focusing on high street businesses and economic findings), People (focusing on high street visitors and social findings) and Place (focusing on observational research and environmental findings). A set of key findings is then identified from both existing intelligence and primary research. This is followed by conclusions and recommended actions, including advice on how best to implement these actions.

A separate Evidence Base underpins the findings and recommendations presented here. The Evidence Base includes:

- A literature review covering previous research relating to high streets and social value more widely
- A description of the project methodology including the case study selection process based on a data-focused approach to identify sites with indicators of high levels of local change
- Findings from each of the case study high streets: Burnt Oak, Lewisham High Street and Lower Clapton Road
- Consolidated findings across the case studies relating to Prosperity, People and Place
- A review of approaches to measuring and evaluating social value in the context of regeneration and public sector investment.



Burnt Oak is an outer London high street bordering LB Barnet, LB Brent and LB Harrow. Most of the high street is part of a designated District Town Centre.



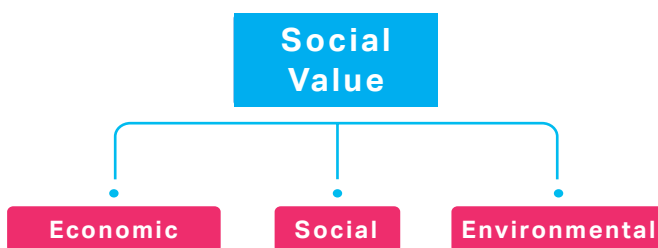
Lower Clapton Road is high street in east London. The high street is undesignated in Town Centre policy terms.



Lewisham High Street is a high street in south London, most of which falls within a Major Town Centre designation.

WHAT IS SOCIAL VALUE?

‘Social value’ – how it is experienced, offered, measured and maximised – is the key concern informing this high street research. For the purposes of public sector work it is helpful to think of social value as the wider impact of programmes across social, economic and environmental concerns, for example on individual wellbeing, group social capital and area-level physical environment¹. It includes benefits that could individually be described as economic, social or environmental, and which will often occur in combination with one another.



There is no agreed single definition of social value and different organisations frame the idea in different ways. Economists refer to it as non-economic impacts – public goods and externalities – whose evaluation is set out in HM Treasury’s Green Book 2011.

The aim of maximising social value, particularly in public sector procurement, is a statutory requirement encapsulated in the Public Services (Social Value) Act 2013. Traditionally, public procurement decisions were made through value for money assessments giving great weight to financial considerations, but the Act requires that the inclusion of social value be made in such assessments. It requires public bodies to give regard to economic, social

and environmental wellbeing in relation to public services contracts and connected purposes, but encourages public authorities to develop their own definition of social value based on context and need.

Understanding these various strands of value and how they overlap (for example, a high street economic cluster that also delivers social benefits), requires locally-specific evidence that can accurately capture the different elements of social value. Once this understanding and a baseline has been established, projects and programmes can work toward maximising social value across economic, social and environmental strands through project development, delivery and evaluation.

The Mayor’s ‘City for All Londoners’ and an increased focus on inclusive growth at the GLA, provides a strong prompt for local and Mayoral-level public sector bodies to think about social value and focus on the wider, non-financial outcomes of public policies as well as the social value of organisational decisions and behaviours. London’s high streets support and deliver multiple economic, social and environmental benefits to Londoners across the city. This study sets out to understand these different aspects of social value in high streets, the impact of changes high streets are facing, and how investing in London’s high streets could be more effective for social value and benefit all Londoners.

More detailed guidance about the way social value can be incorporated into procurement, projects and programmes for high streets is given in Recommendation 10, on page 60.

¹ Mulgan, 2010



Cafe on Lower Clapton Road. The physical environment and aesthetics of a high street are important signals which impact how it is experienced and engaged with by Londoners across different demographics.



Grocery store in Burnt Oak. High streets can provide diverse economic opportunities for employment and entrepreneurship.



Shopping parade on Lewisham High Street. High streets offer local, easily accessible places for Londoners to visit.

WHY HIGH STREETS?

As well as being one of London's most characteristic urban features, high streets are the city's most common public asset: everybody has one.

Speaking both to high streets businesses and to high street users this research found that a huge array of value is clearly derived from high streets' many economic and social functions as well as their physical and environmental characteristics.

High streets are the places most Londoners can walk to or get the bus from, they provide common access points into London's cycle routes, bus and overground systems.

High streets are important places of employment. More people are employed on London's high streets and within 200m of them than in the whole of the Central Activities Zone. And this number is growing. Beyond this fundamental economic value, high streets offer routes into local, accessible economic opportunity: a first Saturday job, a flexible part-time income, a home for new enterprise for incoming populations.

High streets are social, they are places that promote mutual cordiality and cultural exchange. At once global and local, high streets offer both everyday experience and opportunities for social exchange from across the world. Londoners tell us they particularly value this opportunity to be around other people, opportunity that is especially important to socially vulnerable groups like older people or new neighbours looking to make friends. The people, character and range of functions

on the high street are most commonly identified as the thing that Londoners value most about them with 75 per cent of high street users identifying something other than retail as the 'best thing' about their high street.

This study tells us that 51 per cent of visitors to high streets are not in employment, compared with 27 per cent across London – highlighting high streets as natural spatial catchments of marginalised and under-represented groups, including job-seekers, the elderly, young people and recent immigrants. Londoners visit high streets for support and information, both formal, as in a job centre, and informal, as in help to complete housing application forms and helping to manage finances. In addition, for traders, being on the high street increases visibility, accessibility, footfall and sales.

However, in the current economic climate, high streets are facing threats. Retail habits are changing but other factors also present challenges too. Nearly 70 per cent of London's high streets don't fall within a town centre boundary. This means that the majority of high streets have no formal policy designation and are potentially vulnerable to the pressure to deliver housing through redevelopment.

Many high streets are facing issues of declining quality of environment through years of under-investment. High streets need to work alongside London's town centres as a focus for planning policy and investment to deliver local, shared benefits to Londoners.

The Mayor's vision for London

The Mayor's vision for London² lays out priorities for growth, housing, the economy, transport, the environment and social inclusion and cohesion. This vision pledges to ensure that the city is designed to support and encourage social integration, by 'prioritising places and spaces where people can come together in communities' thereby promoting full participation in the life of the city. High streets are key places to deliver this vision, familiar places where Londoners socialise and engage with each other. This work shows how high streets, in their particular mix of economic, civic and social uses, work to bind existing communities as well bridging between different ones. The Mayor has pledged to recognise the value of businesses in and around local high streets and to take account of the particular needs of small businesses. This research confirms the economic value of high streets but also underlines the role they play in building opportunity, openness and social integration.

Healthy Streets for Londoners

The Mayor, along with Transport for London (TfL), is working to deliver the Healthy Streets approach³ across London – a strategy prioritising walking, cycling and public transport to create a healthy

city. The Healthy Streets approach also lays out a vision of London as a city where people choose to visit their local shops, so high streets are a fundamental channel to deliver this. The strategy aims to improve every street, noting that 'London's streets functioning two ways – as places where the city's social, economic and cultural life plays out, and as means for moving people and goods'. High streets operate at this intersection every day, working as places of economic exchange and trade, while simultaneously serving as spaces for Londoners to engage with one another and access vital social, civic and cultural spaces.

Almost all Londoners are within a 10 minute walk of a high street. Our research shows over 90 per cent of high street visitors use sustainable methods of transport to visit their high street(s), the majority of which are walked trips. London's network of high streets must also be supported to ensure it continues to provide for the needs of businesses and visitors, and to reduce the need for car journeys to destinations further away. High streets often facilitate access to the wider transport system, as they provide convenient access points into London's cycle routes, bus and overground system. Investment in high streets can therefore help support and improve healthy travel by making cycling and public transport more appealing. The Healthy Streets indicators, including 'Pedestrians from all walks of life', 'Things to see and do' and 'Places to stop and rest', all relate directly to high streets as social, diverse places, where both retail and other attractions make them places to visit and to linger. Prioritising investment in high streets will deliver these measures of success.

² Mayor of London, 2016.

³ Mayor of London & TfL, 2017.

LONDON'S CHANGING HIGH STREETS

London's high streets provide extensive social value across their various economic, social and environmental facets. High streets are, however, facing a number of both national and local-level changes and pressures which are threatening the value they offer to Londoners:

Lack of policy designation

While town centres benefit from policy designation and protection, high streets remain absent from London-wide policy. At present, the London Plan's draft town centre policies make only minimal mention of high streets. As nearly 70 per cent of London's high streets do not intersect with any town centre boundary, these high streets lack formal designation in planning terms. There is a threat of high streets being marginalised not only in terms of London-wide policy 'but also as sites of opportunities for investment or public sector interventions'⁴.

Indeed, the threat posed by lack of policy designation for high streets is exacerbated by the efforts of existing town centre policy objectives, which aim to 'strengthen the role of town centres as important hubs for the community'⁵. The concentration of policy and funding attention within town centres might have the associated consequence of drawing retail variety, services and resources away from local high streets.

Changes in consumer behaviour

High streets across the UK have been declining as sites of consumer spending

in light of changing behaviours, including online retail. The Centre for Retail Research underlines that across the UK, the share of consumer spending occurring on high streets will have declined from 50 per cent in 2000 to 40.2 per cent by the end of 2018.⁶ The rise of online retail and out-of-town shopping are factors contributing to this decline.

As the significance of online retail as a share of total retail spending in the UK will continue to grow (forecasts show that the share of online retail will have risen from 12.7 per cent in 2012 to 21.5 per cent by 2018-2020) it is expected that high streets will continue facing declining levels of consumer spending⁷. The rise of supermalls in and near London – Westfield London, Westfield Stratford City, Lakeside and Bluewater – is having an impact on high streets, with demand for comparison retail being increasingly drawn to larger centres at the expense of the smaller ones.

Housing pressures

As considerable effort is directed towards finding capacity and space to build more homes in London, employment space is increasingly threatened by the prospect of housing redevelopment. This is particularly true on high streets, where the housing pressures facing individual boroughs, coupled with perception of high street and retail decline, can pose a threat to the survival of high street activities.

As with other types of employment space in London, which is undervalued against the demand for housing, there is

⁴ Carmona, M., 2015

⁵ GLA, 2017

⁶ Centre for Retail Research

⁷ *ibid.*

a danger of dismissing the value of high streets to make space for housing. Non-designated high streets are particularly at risk, although multiple ownerships and the complex spatial nature of most high streets makes them quite resilient to blanket redevelopment.

Affordability pressures

High streets are significant locations of business and employment, which are increasingly facing affordability pressures. As reflected in this study and corroborated by outside research, high streets are largely composed of small businesses on leaseholds arrangements. Along with wages, property is their major business cost and rising rates and rent levels are therefore a growing threat, often surpassing the rate of sales growth⁸. It is not just a question of commercial affordability: high streets also suffer from the pressures of increasing housing affordability. In areas facing high levels of housing price increases, as in Lower Clapton, there is concern over the degree to which high streets can remain accessible and local to a range of proprietors and users.

Rates and regulations

Beyond wider affordability pressures, impacts on the economic function of the high street are also felt through specific measures such as business rates. Individual businesses on the high street report that business rates remain a considerable source of financial pressure and stress, and as they potentially rise due to the April 2017 revaluation, they are expected to have an even greater impact

on the viability of London's high street businesses.

Regulatory frameworks can also have an impact on high street businesses, through misaligned legislation or through lack of access to relevant information and resources. For instance, where legislation groups small and medium sized businesses together small businesses are seen to suffer. Given that these are the majority of businesses on high streets, this can be harmful to the high street as a whole. Businesses interviewed for this study also highlighted the difficulty for independent, small businesses on high streets to keep pace with an increasing and changing regulatory environment.

National-level economic policy

Austerity measures and cuts to public services have a range of impacts on London's high streets. Essential social infrastructure found in and around high streets is under threat from increasing financial pressures on local authorities⁹, changes in national legislation, such as cuts to pharmacies, will reduce the number of businesses performing important social roles, and funding cuts to individual boroughs affects the provision of local services and management of public institutions such as libraries.

The financial constraints that London boroughs are experiencing further impacts the capacity for strategic thinking around high streets. Limited resources limit the scope for public-sector interventions.

8 Carmona, M., 2015

9 Just Space & NEF 2015, Just Space 2016, Scott 2015

WHAT WE KNOW ABOUT HIGH STREETS

Existing work on high streets offers rich insights into their many functions, roles, challenges and potential. Using both primary and secondary research, this study considers how these various high street functions deliver different economic, social and environmental aspects of social value. In line with GLA work on Good Growth, this sections outlines broader perspectives under the themes of Prosperity, People and Place, although it should be understood that while it is useful to consider these individually, they are interdependent and in reality will often function together on high streets.

Prosperity

High streets are important places of employment, particularly from traditionally disadvantaged groups. More people are employed on London's high streets and within 200m of them than in the whole of the Central Activities Zone.

Recent work shows that between 2009-2015 70 per cent of high streets experienced jobs growth and over 90 per cent of high streets have seen growth in the number of workplaces¹⁰. Previous studies suggest that individual high street retail premises employ on average three to four people¹¹. But high streets feature a variety of workspaces as well as retail, including offices, workshops, yards and railway arches, usually located behind and above the immediate high street. These places of work support the wider local economy and are often

closely interconnected. Therefore high streets should be understood as part of a more complex network of workspaces¹², where there is a range of employment and economic opportunity. In the same vein other studies show that London's high streets provide essential social infrastructure as well as a range of employment opportunities for traditionally disadvantaged groups – serving as a 'buffer against inequality,' while supporting the local economy and wellbeing¹³.

People

High streets fulfil a range of functions for individuals, groups and networks. While the primary activity on the high street is exchange, the 'transaction economy', it also contains varied forms of support structures, ranging from formal social infrastructure and informal acts of care, to cooperatives and international networks that transmit small-scale remittances, and as such it is host to a particular civic life too¹⁴.

High streets are key components of civic and community life. They support diversity, social interaction and cultural exchange. They operate as spaces of 'everyday diversity,' allowing people from all over the world to co-exist in one place, and enable immigrants to integrate within a city's economy¹⁵. High streets are both highly rooted in place and connected to far wider and more diverse often global geographies¹⁶.

10 GLA Intelligence and Analysis Unit, 2017
11 Hall et. al, 2016

12 Just Space and New Economics Foundation, 2015
13 Just Space and NEF, 2015; Just Space, 2016
14 Hall, 2012; Hall, King and Finlay, 2015, 2016
15 Zukin, Kasinitz, and Chen, 2015
16 Hall, 2012 and Hall, King and Finlay, 2015, 2016

High streets are 'highly connected, both physically and to different transport links, they offer a hugely diversified mix of uses and provide an intensity of locally based activity and enterprise that sets them apart from other urban structures'¹⁷. Evaluating the success of high streets must look beyond retail performance to include the range of activities it supports¹⁸. Indeed, a simple focus on retail ignores the 'layers of commercial, creative, cultural and productive activity' occurring adjacent to high streets that supports the local economy and defines the high street's distinctiveness¹⁹.

Place

Recent research with Londoners has confirmed the importance of the high street's heritage, physicality and aesthetics to local identity and perceptions of place²⁰. In relation to these findings, other work emphasises that physical regeneration efforts should recognise the importance of human capital, 'consider people-focused outcomes, and help communities benefit from investments in place'²¹.

As such, care must be taken to ensure that increases in land value do not marginalise or displace existing residents. While there is growing acceptance of the varied forms of value that high streets provide, and their potential to deliver 'quality of

life benefits to Londoners'²², there is also a growing consensus that high streets are rapidly changing, with many of their valuable functions under threat. The GLA's own work, which includes 'Learning from London's High Streets', 'Action for High Streets' and 'Culture on the High Street', reflects a desire to support high streets holistically by understanding how streets can continue to be 'welcoming, diverse, distinct and growing', inclusive, vibrant cultural spaces.

Building on the importance of place, it is argued that high streets should be supported by first defining 'contextually relevant measures of value through a much closer recognition of how different high streets and town centres are used and occupied differently'²³. Interventions should make an 'ethical' commitment to place by developing an understanding of the 'depth-structure of the high street'²⁴. In addition, they must contend with both the 'tangibility of what high streets do in socio-economic terms, as well as the intangibility of what they mean to local people'²⁵.

17 Carmona, 2015
 18 Griffiths et al., 2008
 19 Scott, 2015
 20 Warbis and Parsloe, 2017.
 21 Johar, 2017

22 Gort Scott & UCL, 2010
 23 Hall, 2011
 24 Clossick, 2014
 25 Griffiths, 2015

FINDINGS

Prosperity

This section of the report focuses on the findings collected during the primary research that relate specifically to the economic aspects of social value, as reported by high street proprietors and employees. Evidence from 116 face-to-face shop surveys and 25 semi-structured interviews have been synthesised to better understand the role of high streets in generating prosperity, both economic and social.

Analysis from this business-focused research shows that:

- High streets hold significant economic value primarily due to the employment densities they support. They offer a range of self-employment opportunities, create opportunities for local and national suppliers, and provide a mix of retail options to cater to the needs of local buyers.
- The socio-economic value of high streets lies in their adaptable nature, allowing high streets to meet the needs of established communities and newcomers. It also centres on their ability to offer diverse tenure options to traders, and simultaneously create employment opportunities across education levels, country of origin, age, and to a lesser degree, gender.
- Social value is created by high streets through the particular mix of commercial outlets with social infrastructure such as libraries, pharmacies, places of worship, community centres, and the additional 'informal' help they offer such as with filling forms, help with directions, face-to-face contact etc.

In particular, this research illustrates that high streets provide a variety of employment opportunities in multiple types of businesses. Our research findings show that these opportunities are highly variegated, consisting of employment for marginalized groups (low education, elderly, first time employment, women) as much as for highly educated individuals seeking full-time employment. In line with existing literature, this research suggests this employment is predominantly self-employment, both part-time and full-time and in high numbers, with shops across all three streets averaging four employees per shop.

Businesses on high streets not only provide a variety of employment opportunities, they also provide space for diverse tenure options. In this sense they operate as unique employment spaces where a single unit can include multiple units or shops, incorporating various forms of tenure under one roof (Figure 2).

KEY

Uses within multiplicitous unit:

- | | |
|----|--|
| G. | Palm 2 Organic grocery store and cafe: |
| | A. Deli |
| | B. Self-service buffet |
| | C. Cafe |
| | D. Organic super-market |
| 1. | K.O. Bloodline Gym |
| | E. Changing rooms |
| | F. Training area |
| | G. Boxing ring |
| | H. Free-weights area |
| 2. | I. Yoga Centre |
| | J. Quran study group |

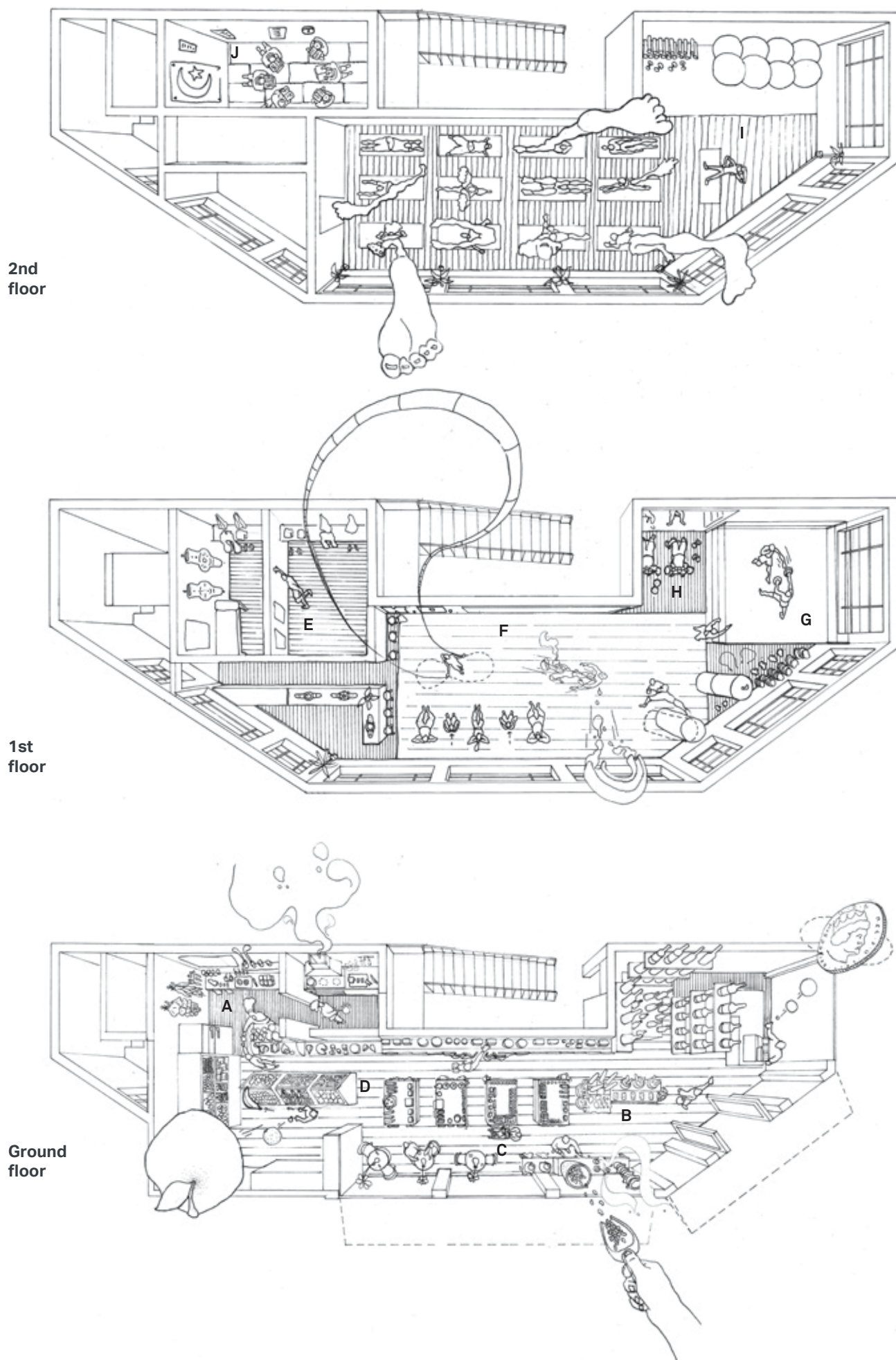


Fig 2. Internal details of one of the most multiplicitous units on Lower Clapton Road

Employment opportunities are extremely valuable to traders with many travelling significant distances. High streets therefore offer opportunities beyond the local, attracting traders from throughout and beyond London. This research also finds that a high number of retailers depend on local (and national) suppliers, thus creating a potential multiplier effect in the economy.

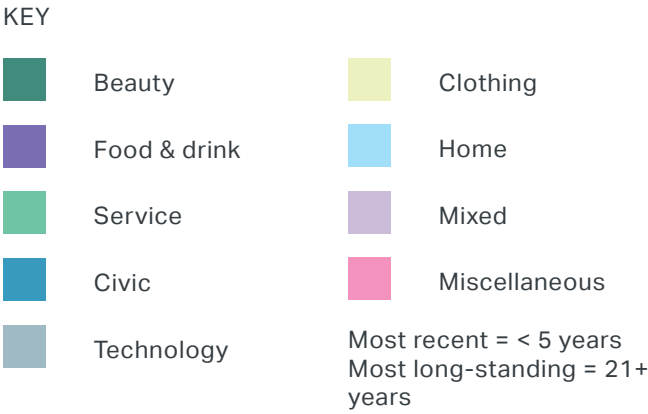
The economic function of the high street is also social. The variety of employment on high streets is matched by the variety of commodities traded and range of shops located on the street. This variety is central to the economics of the high street but also serves an important social value, with such shops acting as important hubs and creating informal networks of communities along ethnic and cross-cultural lines.

Economies on high streets are as recent as they are long-standing, reflecting both resilient and precarious realities (Figure 3). The tapestry of shops with different owners meets multiple, and often changing needs and populations. This suggests that the economic capacity of the high street is highly adaptive, performing a social function catering simultaneously to established communities and newcomers. The high turnover of shops reflects both precarious practice and stepping stones into the formal economy.

Semi-structured surveys and further conversations revealed a rich network of association, help and care in the high street. In addition to shops, we found that social infrastructures including libraries,

pharmacies, religious institutions, community centres and leisure centres, along and adjacent to each of the three high streets studied, serve an integral role in contributing to the social value here. Moreover, both shops and social infrastructures provide additional 'informal' services in addition to their core duties. High street shops often host informal services with high social value. Within surveyed shops a high number of informal services were recorded in addition to core trade.

This suggests that not only is the high street a critical piece of 'hard' infrastructure but also integral to soft infrastructure networks found in shops and formal institutions such as libraries and community centres. While businesses on high streets perform important social functions, our findings show that collaboration and associations between businesses can struggle to succeed, with respondents citing rates, competition and capital interest as factors in this. Furthermore, respondents often failed to perceive the social value they or their businesses create, or the value of engaging with other businesses on the street.



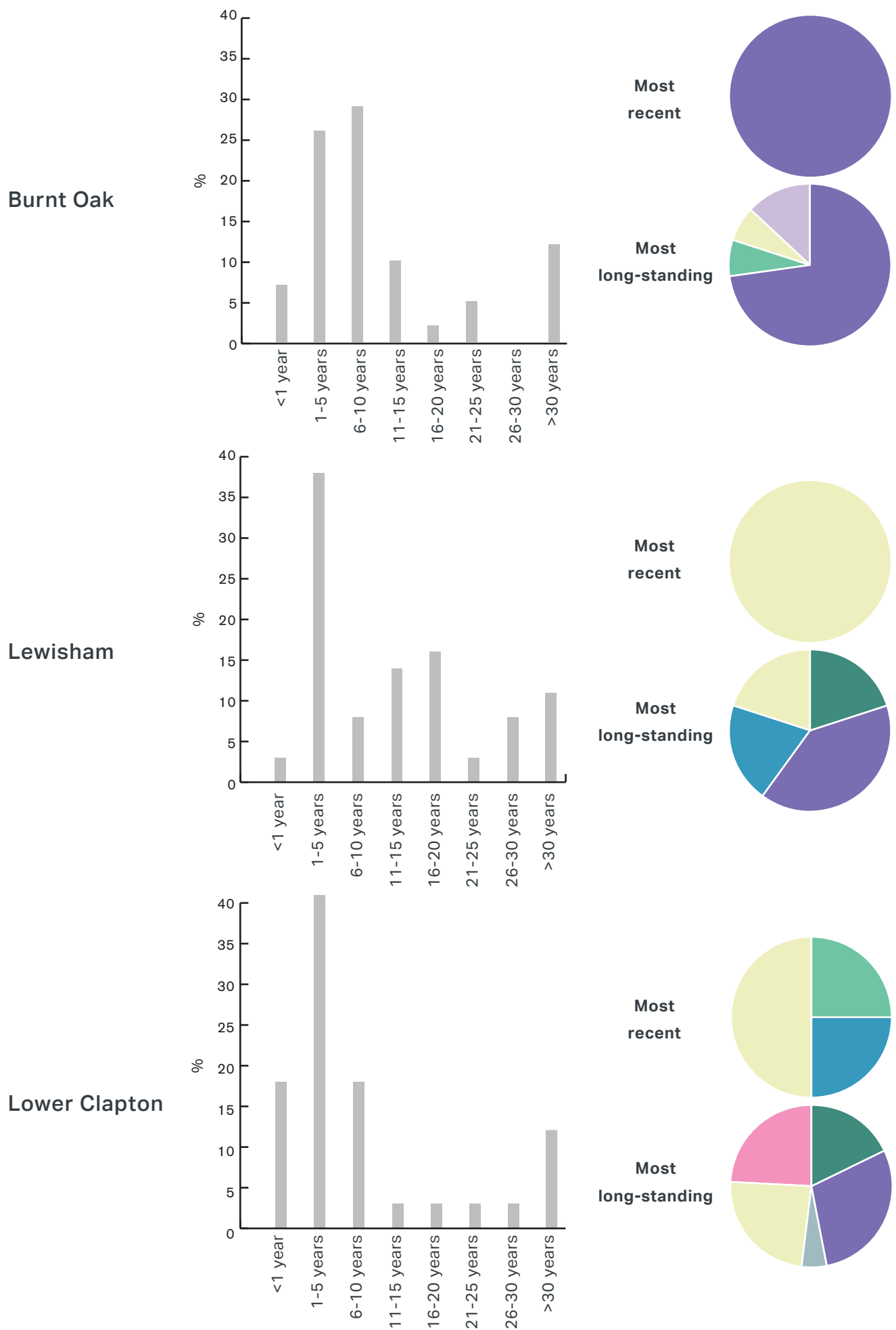


Fig 3. Businesses by (L) duration of the shop and (R) type of shop by duration on the street

People

This section of the report focuses on the findings collected during the primary research that relate specifically to the social aspects of social value, as reported by those visiting or using the high street. Findings are organised around how people use the high street, what people value on the high street, and how people formally engage within their local communities. These findings are drawn from the surveys with 90 high streets users.

Analysis from this user-focused research shows that:

- Londoners value high streets beyond their core utility; there is discrepancy between how people report using the high street and how people report valuing the high street. This highlights

users' ability to identify features of the high street that are commonly understood as valuable, rather than just of individual use.

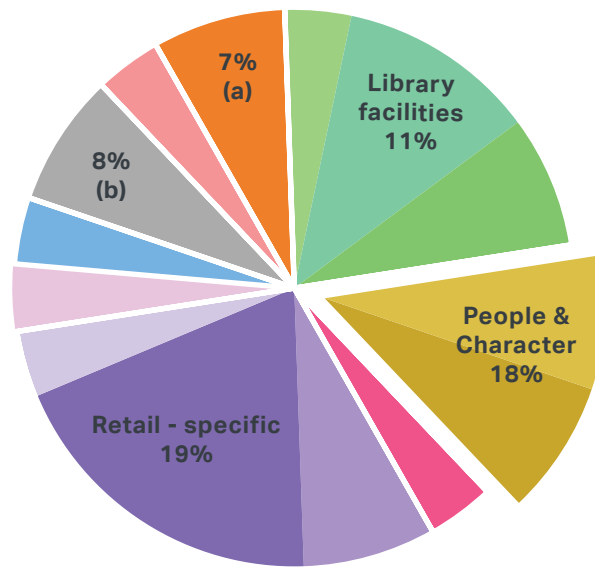
- High streets are social, they are places that promote mutual cordiality and cultural exchange. 'The people of the high street', both in terms of familiarity and their overall diversity, are amongst the top valued features cited across all of the high street profiles.
- High streets are a shared, common assets for all Londoners, as well as catchment zones for specific vulnerable and marginalised groups. The accessible and local nature of high streets is key in fulfilling this role.

Figure 4 illustrates the distribution of survey answers identifying the most valued high street features across

KEY

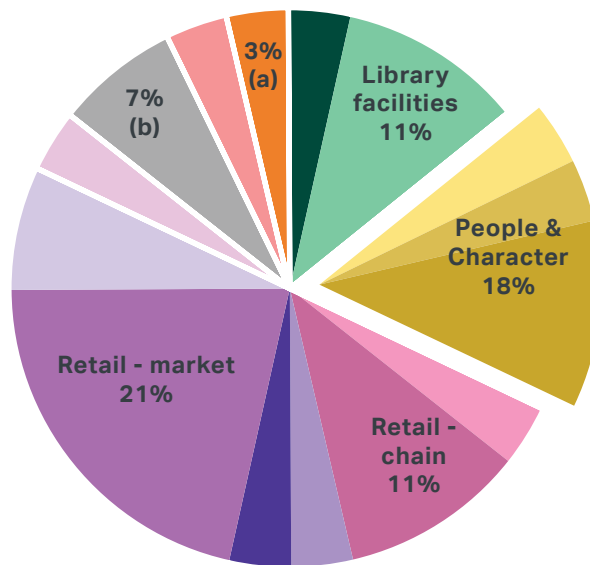
	Retail - convenient		High street offer - range		Health facilities
	Retail - variety		High street offer - affordability		Leisure facilities
	Retail - chain		High street offer - inclusivity		Faith facilities
	Retail - independent		Transport - to work/school		Library facilities
	Retail - specific		Transport - connectivity (other)		Open space
	Retail - market		Employment - place of work		Community landmarks
	Pop up provision		Employment - place to work		Safety / security
	Services - beauty		Employment - looking for work		Streetscape - infrastructure
	Services - finance / legal		Employment - support		Streetscape - accessibility
	Services - post office		Character - place to linger		Streetscape - cleanliness
	Food & drink - day		Character - aesthetic		Proximity to home
	Food & drink - night		Character - vibrancy		Residential affordability
	Produce - diversity		People - diversity		Gentrification - sweet spot
	Produce - fresh / quality		People - familiarity		
	Produce - affordability		Socialising		

Burnt Oak



a. High street offer - Affordability
b. Transport - Connectivity

Lewisham



Lower Clapton

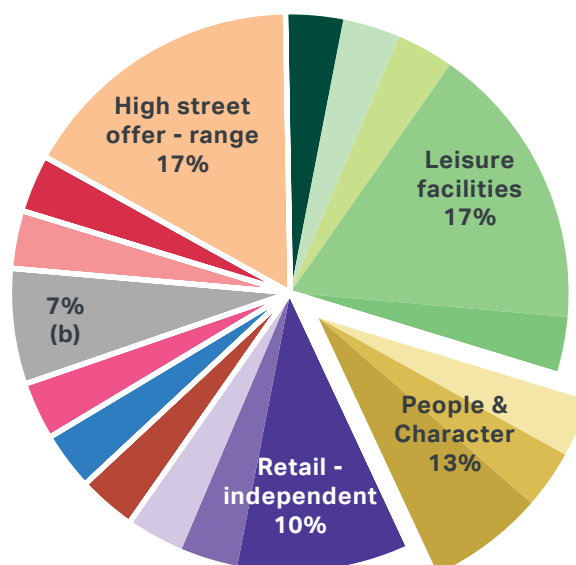


Fig 4. 'What do you think is the one best thing about this high street?'

all three case study high streets. Respondents were asked an open question: 'What do you think is the one best thing about this high street?'. The key represents the range of high street features identified by respondents.

In Figure 4, the proportion of answers relating to 'People' (the diversity and familiarity of people on the high street), plus 'Character' (the vibrancy of the high street) is highlighted, showing the value of non-physical features of the high street. High streets are valued as inclusive, social places, and places of cultural exchange.

Further analysis and demographic profiling of respondents confirms that high streets are hyper-local city spaces. 63 per cent of users walk to the high street and are within a 10-minute walking distance.

Survey responses also confirm that retail is still a core element both of use and value for high street users, but what is valued and used varies across high street profiles and user profiles (for example street markets, chain stores or independent retail). We found that high streets with high levels of ethnic diversity correlate with the use and value of an ethnic food offer, while older people's use and value of retail tends to relate to the convenience of the offer.

Other or non-retail uses are equally important. 45 per cent of users' primary high street use was non-retail related. Amongst non-retail uses, amenities and facilities such as leisure centres and libraries are amongst the most valued, together with 'socialising' on the high

street. Non-retail high street use is most significant amongst teenagers and the under 25s.

High streets are also valued as sites of connectivity. They are used and valued for their ability to connect people to their place of work, to other high streets with functions complementary to the local high street, and to city-wide networks. Local formal and institutional forms of participation are usually tied to specific facilities on the high street, such as community centres, libraries, leisure centres, etc.

Barriers to participation include lack of interest but also time restrictions related to work and family responsibilities. Lack of information about opportunities for participation, or suitability of those opportunities, also prevented some users from formally participating.

More 'informal' types of participation are embedded in networks such as family links and support structures related to ethnic or religious affiliations as well as cross-cultural networks. These include child-minding, money management, information distribution and ad hoc business support functions, which are much harder to capture through research and surveying.



Fresh produce business in Burnt Oak. High street users value the regular relationships with local businesses and the specialist food products. Those catering to particular ethnic groups are particularly highly valued.



Group talking beside Mosque in Lower Clapton. Socialising is amongst the most valued non-retail features of high streets.



Pharmacist in Lower Clapton. Londoners value their relationships with facilities like pharmacies and post offices.

Place

This section of the report focuses on the findings collected during the primary research that relate specifically to the physical and environmental aspects of social value, as reported by those visiting and using high streets as well as high street proprietors and employees. These include comments relating to the physical environment of the high street, its character and aesthetic, local networks and civic pride, and how each high street relates to other high streets and places. Across the three case studies, themes relating to 'Place' were often highlighted in response to what people use the high street for, what they value, and perceived change of the high street.

Londoners are adept at 'reading' high streets, using bellwether indicators such as cleanliness and streetscape

quality to identify high streets at tipping points of success or decline, and local or even national trends in the economic landscape.

Figure 5 illustrates perceptions of change across all three case study high streets. Respondents were asked an open question on whether change in the area has affected the high street, and if so, how. The key below provides an overview of responses received from respondents identifying change. Figure 5 also illustrates perceived elements of change, and if the change is identified as positive or negative. It shows that the same elements of change can be perceived both positively or negatively by different respondents.

Change is perceived differently across and within high streets, which at times depends on who the change affects. The

KEY

	Retail - convenient		High street offer - range		Streetscape - infrastructure
	Retail - variety		High street offer - affordability		Streetscape - accessibility
	Retail - chain		High street offer - inclusivity		Streetscape - cleanliness
	Retail - independent		Transport infrastructure		Residential affordability
	Retail - specific		Traffic management		Gentrification - sweet spot
	Retail - market		Noise pollution		Gentrification - polarisation
	Food & drink - day		Character - place to linger		Business support
	Food & drink - night		Character - aesthetic		Safety / security
	Produce - diversity		Character - vibrancy		Anti-social behaviour
	Produce - fresh / quality		External perception		Little change
	Produce - affordability		People - diversity		No change
			People - familiarity		
			People - busier		

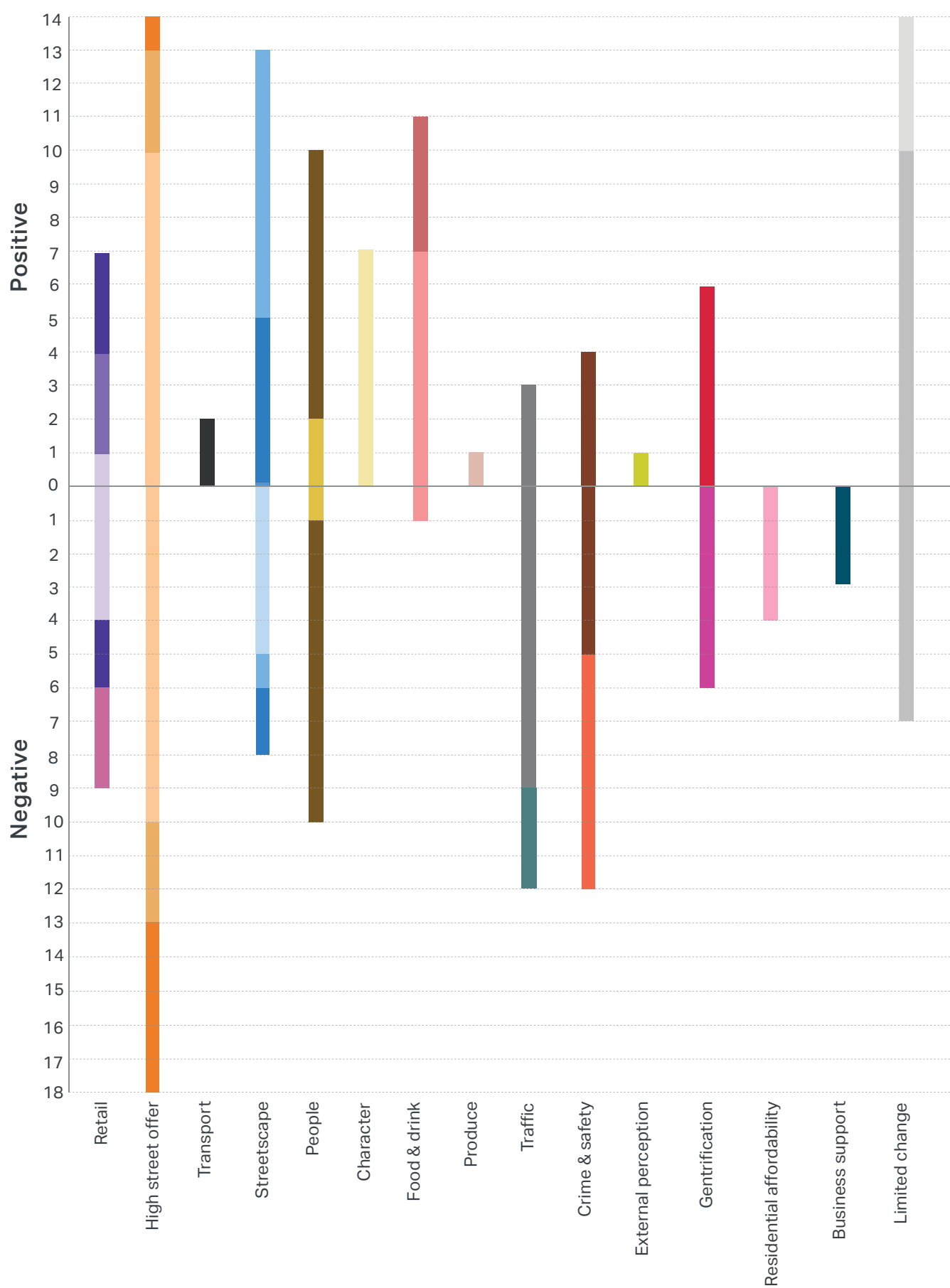


Fig 5. "Has change in the area affected the high street, and how?"

high street offer, streetscape quality and people are the most commonly cited elements of change (both negative and positive). Increased food and drink provision, and streetscape improvements, are most proportionally positively perceived, while traffic, and crime and safety issues, are more proportionately negatively perceived. High streets are walkable, local destinations. They can support healthy lifestyles and play a key role in providing spaces for people to socialise and for local networks to develop within the neighbourhoods in which they are situated.

Changes identified by respondents that could encourage high street use relate to the character of the high street, stressing the importance of character in terms of aesthetic considerations but also in terms of the general 'feel' of the high street. The food and drink offer is the main draw of the high street.

Users across age groups expressed a desire for an improved food and drink offer both in quantity (number of restaurants, bars, etc) and quality (e.g. better quality restaurants rather than takeaways). A number of changes have the potential to promote greater use of the high street, but targeted interventions would be necessary to capture all user groups.

Research around alternative high street use and the attraction of particular streets helps to identify an 'ecosystem' of high streets which intersect and supplement each other. These high street ecosystems highlight a complementary offer across a number of local high streets, with people travelling to find

specific services or produce, different types of retail, leisure facilities or evening activity. They reflect high streets as a network of different offerings, rather than places in direct competition.

Users do not necessarily view visiting different high streets for different purposes as a negative experience, or one driven by deficiencies. However, in some cases travelling to other high streets is a necessity driven by specific gaps in the local high street offer. This relates to the closure of certain services such as banks and post offices.

Londoners use a network of local high streets to fulfil a range of complementary functions, and therefore rely on their ability to access them (Figure 6). Investment in active transport and local transport connections is key to sustaining existing high street ecosystems outside of the Central Activities Zone.

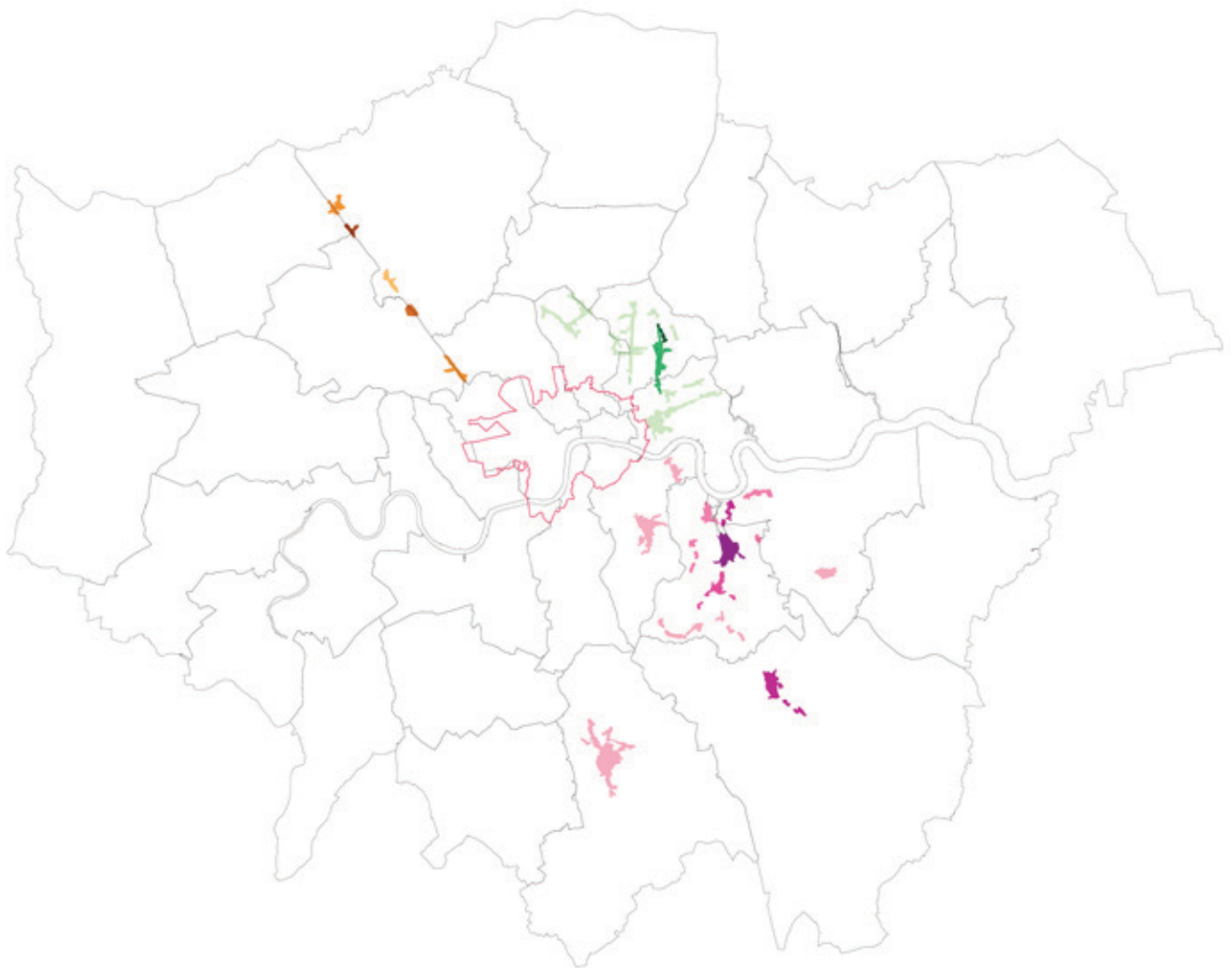


Fig 6. "Do you visit any other high streets nearby -if so, where and what for?"

KEY

Burnt Oak

- Most regularly identified
- Less regularly identified
- Case study high street

Lewisham

- Most regularly identified
- Less regularly identified
- Case study high street

Lower Clapton

- Most regularly identified
- Less regularly identified
- Case study high street
- Central Activity Zone boundary

Key findings

High Streets for All considers the value of London's high streets across the economic, social and environmental aspects that constitute social value. This report's associated Evidence Base provides a more detailed breakdown of the wide range of findings coming out of this work and is published separately. The following section outlines the most significant findings across considerations of Prosperity, People and Place which should inform future policy, planning and investment on and around high streets.

The following 10 key findings are drawn from the study's primary research as well as insights from previous scoping and research work. These findings capture the value and opportunities that London's high streets offer, as well as the challenges they currently face. They inform the conclusions, illustrating what high streets offer, as well as the final recommendations that follow.

- 1. High streets are significant and growing places of employment.** 47 per cent of businesses outside Central London are on a high street and 1.45 million employees work on or within 200 metres of a high street, and this number is growing.
- 2. High streets offer local and accessible economic opportunities for an inclusive London.** Opportunities are highly varied, consisting of employment for marginalised Londoners as much as for highly skilled people seeking full-time employment.
- 3. High streets are social, promoting community and cultural exchange.** 45 per cent of surveyed users' primary high street use was non-retail related – evidence that Londoners value the social exchanges that high streets support. This is especially important for vulnerable groups, particularly the elderly.
- 4. High streets are important gathering spaces for marginalised and under-represented groups.** Visitors to high street include a significant proportion of job-seekers, elderly people, young people and recent immigrants. Our study tells us that 51 per cent of visitors to high streets are not in employment, compared with 27 per cent across London.
- 5. High streets provide crucial social infrastructure and social services for Londoners.** Both social infrastructure sites and shops often go beyond their 'formal' role in offering various forms of support and care to high street

users. Almost 40 per cent of small businesses interviewed performed some kind of social function.

change on their local high streets can often be affected by a wider awareness of changes in their local borough and in London as a whole.

- 6. Nearly 70 per cent of London's high streets don't fall within a town centre boundary.** The majority of high streets have no formal policy designation and are potentially vulnerable to development pressures.
- 7. High streets provide a range of work spaces which can meet the needs both of newly formed and long-standing businesses.** The economic capacity of high streets is highly adaptive, catering to existing communities and newcomers alike.
- 8. High street businesses struggle to operate and to participate in collective efforts.** Nearly 70 per cent of small businesses find rent to be unaffordable, and many find collaboration with each other and local communities difficult due to multiple pressures including rates, sales, competition and time commitments.
- 9. High streets are local, walkable destinations and important points of connectivity.** 63 per cent of surveyed users walk to the high street, showing they are accessible and promote healthier, more active modes of transport. High streets are also valued places of transit and connectivity, providing access to places beyond the high street.
- 10. Processes of urban change are perceived acutely on London's high streets.** Londoners' perceptions of

CONCLUSIONS

High Streets for All understands social value on high streets as a range of cultural and economic experiences, shaped by life and livelihoods and the infrastructures and spaces that support these.

From the perspective of local high streets in London, social value is sustained by the benefits people gain from moving through and engaging in the variety of spaces and activities on the street. Economic value relates to the particular employment landscape they offer, the opportunities they create for local suppliers and the mix of retail and services they provide. In this regard, the economic is also social, and similarly the social is linked to the goods, services and employment offered by the shops on the street.

Social value accrues in day-to-day experiences ranging from individual wellbeing to exchange within and across groups, and social contact that extends to sharing and collaborating. Social value is not normative; it depends on access to connectivity, affordability and public resources, particular to place as well as social status and life chances. In London social value on the high street also shifts in relation to varied forces of change including demographic change, measures of deprivation, shifts in land use, regulation and affordability.

This research found the following aspects of high streets provide significant social and economic value for Londoners, which should be protected and enhanced through policy, advocacy and investment:

'We offer social contact, we know people, their names. We talk about their journeys, their days. For many from the older generation, this is the only social contact they have with others,'
- Bakery owner



WAYS INTO WORK

High streets offer accessible entry points to enterprise and employment. They offer opportunities across education levels, for individuals across all ages, and support diverse tenure options for traders.



OPPORTUNITIES FOR LOCAL SUPPLIERS

Businesses on high streets rely on local and national suppliers for their businesses, generating prosperity and economic output in London and nation-wide through an economic multiplier effect.



FACE-TO-FACE CONTACT

One-to-one social contact is sustained by the opportunity for spontaneous and everyday conversations, supported by familiar spaces and people.



HIGH EMPLOYMENT DENSITIES

High streets support high employment densities on the street. Small-scale retail units along our case study high streets employ an average of 3-4 employees per unit.



RANGE OF BUSINESSES & SERVICES

High streets provide a mix of retail options to serve the needs of varying demographic groups. They often cater directly to local residents, reflecting local preferences and purchasing power.



INFORMATION & SUPPORT

The high street is perceived as a first point of support, fulfilling an array of functions. These include medical advice (e.g. pharmacies), translations, advice on local area and directions.



TRUST & MONEY

High streets host various systems of trust. The transfer of money emerged as a key feature of trust, sustained through regular contract on the street between businesses and customers.



MIXED-USE INSTITUTIONAL PRESENCE

High streets are hosts to accessible institutions, and often offer a spectrum of services (including pharmacies, libraries, community centres).



ADAPTABILITY

Shops and other workspaces on high streets are as recent as they are longstanding. High streets offer multiple economic opportunities for businesses interested in catering to existing communities and new comers both.



CONVENIENCE & CHOICE

High streets provide a wide offer of choice through independent shops, eateries, organizations and workspaces, and provide conveniently located activities and services.



TRANSIT & CONNECTIVITY

High streets are routes that connect people to places, both on the street and to beyond. Buses, tubes and trains links enhance the connectivity of the area, increasing the thresholds of support and the viability of activities on the street.



PUBLIC LIFE

High streets offer the chance to engage in public life, to get out of the home and be surrounded by people without having a specific purpose.



ACCESSIBILITY & HEALTH SERVICES

Face-to face social contact further extends to including the long-term relationships between proprietors and customers, and are especially significant in relation to health services.



FOOD & CULTURAL FOOTHOLDS

High streets host specific services for specific groups, bringing ethnic communities together in particular.



NIGHT-TIME ACTIVITIES

Extended operating hours of particular high street uses and services have value for both Londoners and businesses as well as contributing to safer night travel.



RELIGION & SPIRITUALITY

High streets contain a notable range of formal and informal religious spaces. These both attend to specific religious needs, and more general features of well-being such as sports classes and nursery schools.



CONVIVIALITY & CONTACT

High streets are seen as sites of wider change and host to both convivial and conflictual responses to change.



SAFETY

High streets are generally described as safer public environments, distinctive from side streets and back alleyways.

STRATEGIC CASE FOR INTERVENTION

The continued support of London's high streets through Mayoral policy, investment and advocacy will be essential to delivering Good Growth for London, and addressing the Mayoral priorities around the economy, social integration, culture and Healthy Streets in order to make London a City for All Londoners.

The Mayor's vision is to create a city which is *'inclusive, attractive and accommodates a variety of uses in inner and outer London'*. Good Growth means *'tackling inequality and ensuring that London is a city where prosperity sits alongside greater equity in terms of opportunities and benefits for its residents. People, places and prosperity are inseparable – take away one and the whole idea falls'*.²⁶

This study clearly highlights that investing in high streets is a simple and inclusive way to benefit all Londoners. The interconnected nature of social and economic value found on high streets means that investment can yield multiple benefits.

High streets should be a focus for investment as they are sites well equipped to deliver Good Growth – they are inclusive, shared and diverse, as well as destinations for harder-to-reach Londoners and vulnerable groups. Given the multiple ways through which high streets deliver value to Londoners, investment, advocacy and policy development focused on high streets has the potential to impact all three strands of social value: the economic, the social and the environmental.

There is perhaps no other type of urban feature which serves the widest possible range of Londoners in an equally inclusive and diverse way as high streets. They are common, shared assets that serve a wide array of user groups. As identified in previous studies, and reaffirmed here, most Londoners have extremely local access to a high street, and this work further illustrates how enduring and accessible the high street is for people across age, gender and ethnicity. Across London, high streets are commonplace and shared amongst a wide array of users – everyone has one.

In addition to the inherently shared and diverse nature of high streets, the local and accessible nature of most high streets mean that these spaces are important gathering places for user groups, particularly of potentially vulnerable groups like older people, job-seekers, young people especially those not in education, employment or training (NEETs) and people entering into work or business for the first time. Because high streets are often local, familiar and inclusive spaces, groups which might struggle to gain either physical, social or institutional access to other parts of the city can often be found on the high street. As such, high streets provide a useful spatial focus for initiatives which seek to engage with and support these groups.

Beyond their core functions, high streets offer informal (and often invisible) support to communities, including to vulnerable people. To recognise the unique compendium of social assets that high streets offer, they should be supported through targeted investment that goes

26 GLA, 2016.

beyond traditional social infrastructure venues and institutions.

High streets are a particular urban asset that converge and capture a wide array of social groups. As a common asset, and one that provides the opportunity for daily contact, they contribute meaningfully to public life, mutual cordiality and integration in the city. Londoners express that continued high street use establishes relationships of familiarity and friendship. The high street as a common asset is therefore also an opportunity for cultural exchange. 'Co-presence'²⁷ and tolerance as key features of high streets contribute to social inclusion and social cohesion. Investment in high streets supports an inclusive and tolerant London. For traders, being on the high street increases visibility, accessibility and footfall. It also provides them with a low-entry opportunity for self-employment.

This work has confirmed that high streets are local, walkable destinations for most Londoners²⁸. As such, high streets provide Londoners with local commercial and social offers that can support healthy lifestyles and reduce environmental impacts of travel. High streets provide an easy-to-reach reason to leave home which is good for both physical health and mental wellbeing. This function is particularly vital for vulnerable groups, some of whom report that they come to the high street for this purpose. Moreover, from an environmental perspective, high streets minimise the need and time of travel, either to work, or

to access or deliver goods and services. For those living locally, successful high streets minimise the need for multiple car journeys, and encourage walking, cycling and the use of public transport.

London's high streets have many stakeholders who can all play a crucial role in their future. As well as the Mayor, his agencies and London boroughs, these include landowners, developers and investors, cultural and religious organisations, local partnerships and groups such as Business Improvement Districts (BIDs), business associations, amenity groups, community and third sector organisations, and individual businesses, residents and others.

In summary, high streets are inclusive, shared and diverse – well-equipped to deliver Good Growth as they impact all three strands of social value: economic, social and environmental. They:

- Offer employment opportunities for vulnerable groups in London
- Provide traders low-entry self-employment opportunities as well as increased visibility, accessibility and footfall
- Contribute meaningfully to public life
- Provide Londoners with local commercial and social offers that can support healthy lifestyles and reduce environmental impacts of travel
- Attract marginalised groups that might struggle to access other physical, social or institutional spaces in the city
- Offer informal and often invisible support to communities
- Create opportunities for cultural exchange, contributing to social cohesion and inclusion in the city

²⁷ Vaughan, L. et al, 2016

²⁸ UCL/Gort Scott, 2010.

RECOMMENDATIONS

Building on the findings of this report, the following 10 recommendations set out how high street stakeholders should work together to deliver inclusive, shared and locally-responsive growth on London's high streets through policy, investment and advocacy. The suggested actions found here are primarily aimed at Boroughs, but are relevant to all the stakeholders who play a crucial role in London's high streets including landowners, developers and investors, cultural and religious organisations, local partnerships and groups such as Business Improvement Districts (BIDs), business associations, amenity groups, community and third sector organisations, and in some instances, individual businesses, residents and high street users.

1. Take a strategic place-based approach.

Place-based approaches involve recognising the singularity of individual high streets: understanding local opportunities and needs before intervention and working across silos to implement place-specific visions to shape and steer growth towards London's high streets.

Adopting place-based approaches to high street projects requires strategic cross-departmental working and knowledge-sharing at borough level given that high streets are affected by issues across planning, asset management, health, education and business and skills. High streets often cross borough, town

centre and ward boundaries. Therefore it is critical to curate a joint approach to steering development and improving local governance.

A place-based approach should prompt boroughs to engage directly with the questions of use, value, physical improvements, participation and social networks that this report has shown to be crucial to understand high streets holistically. As well as town centres, this study argues that high streets are particular sites of identity and belonging for Londoners, which warrants policy recognition.

Developing a place-based approach is specifically relevant in the context of high streets typically being non-designated in planning terms. Opportunities for policies which recognise and target high streets in their own right are limited, and by extension their existence is potentially threatened as London seeks to accommodate growth. There is a need to move away from a sole focus on town centres as targets for investment and policy designation and recognise the economic and social activity that exists along high streets and beyond town centres. High streets provide a gradient of workspaces and significantly lower rents outside areas with town centre designations, which enables start-up initiatives, innovation and prosperity for low-revenue activities.

This study has firmly highlighted the varied and locally-specific nature of London's high streets. While high streets can be understood as a common asset, the particularities, offer and catchment

of each high street is different. High streets are also by their nature mirrors of their local constituents. Retail provision, community facilities and social networks embedded in high streets reflect the economic and demographic profile of an area, with the high street often serving particular local needs. Developing a place-based approach to high streets requires a mixed methods approach which is, at its core, informed by qualitative methodologies. Spending time on the high street, speaking to people using and serving the street and getting to know the daily and weekly dynamics of use and offer are key to developing astute and responsive high street strategies.

High streets are often seen as indicators of identity and change in a local area or the wider economic landscape. Place-based approaches will work to capture these particular functions and facilities which are locally meaningful and attached to impressions of high street improvement or decline. This research has found that although people expect a degree of change on their high streets there are tipping points where change is considered as 'too much' or 'gone too far'. Developing place-based approaches also reduces the risk of smaller local centres becoming synonymous with decline due to their smaller catchment areas, as these approaches develop a more accurate and dedicated assessment of value which goes beyond more macro-level, retail-focused trends.

Suggested actions for high street stakeholders:

- Encourage an area-based approach to regeneration by supporting strategic partnerships that span borough boundaries and work where joined-up vision is more difficult, in particular for high streets and town centres.
- Develop locally specific, cross-departmental town centre and high street strategies that set out holistic visions for people, place and prosperity including planning, asset management, health, education and business and skills.
- Acknowledge the social value of high streets outside of town centre boundaries when developing strategies, plans and projects.
- Encourage active transport and local transport links in addition to major transport connectivity in and out of the Central Activities Zone, acknowledging Londoners' reliance on a network of local high streets.
- Gather fine-grained baseline information, including economic make-up, sector profiling of town centre and high street organisations and businesses, and the skills and knowledge base present in these places, as part of wider placeshaping strategies.

2. Promote citizen-led regeneration.

Enabling high street users and businesses to have a role in the stewardship of high street places will be vital to making sure they grow and evolve in a way that benefits all Londoners. This involves supporting local partnerships and community-led governance while also building capacity to remove the barriers that Londoners face in engaging in civic participation and active citizenship.

Londoners are adept at 'reading' high streets. High street users are alive to the myriad of elements which constitute not only the physical high street, but the social and economic networks embedded on the street too. Londoners are astute in observing and conceiving of how these elements impact both themselves and others, and how these impacts have changed over time. Perceptions of change are often affected by wider awareness of changes in the local borough and London as a whole, but linked back to evidence on the high street. This fluency, coupled with the diversity of those who use London's high streets, means that high streets inherently elicit a range of opinions from users – reflective of the immense range of experiences lived on and around each street.

This wealth of local knowledge and fluency with high streets should be thought of as a resource for high street investment. It can inform project

development and decision making, drive regeneration initiatives through programmes such as crowd-funding and provide long-term stewardship of London's places through groups such as business associations and town teams.

However, this study has revealed challenges to Londoners engaging with formalised or institutional participation processes. Reasons given by those surveyed for not being involved in local participation opportunities included personal lack of interest and disillusionment, and also highlighted a range of 'barriers' to participation such as time restrictions and lack of available information, as well as suitability of activities on offer. These findings indicate that encouraging Londoners to actively engage with high street regeneration will need to take into account practical considerations such as work hours and childcare, as well as qualitative factors such as making an attractive offer to their intended audiences.

Interventions which are explicitly engaged more directly with community initiatives – such as crowd-funding programmes – would further benefit from tailored support for groups with lesser experience of such processes. It is recognised that such enhanced support has the potential to be resource intensive for the funding body, and as such external partners should be considered for grant management and monitoring.

Programmes supporting high street businesses should be carefully tailored to the capacity and abilities of those involved. Areas with challenging

trading environments are likely to have, simultaneously, limited capacity and great need for such initiatives. Potential stewardship arrangements exist on a spectrum, from more formalised BIDs and trader organisations, through to one-off events. Finding the 'right fit' arrangement for the high street in question will be beneficial in empowering businesses to guide the future of their high street.

Suggested actions for high street stakeholders:

- Acknowledge, understand and remove 'barriers' to civic participation, particularly for disadvantaged and under-represented groups so that high streets can directly benefit from the wealth of knowledge, skills and fluency of local people.
- Develop regeneration policy and investment that is citizen-led, for example skills exchange projects, neighbourhood planning and participatory budgeting.

3. Be inclusive by engaging harder-to-reach citizens.

In order to ensure high street interventions are inclusive it is important to consider who is participating in decision making and who is benefiting, by looking beyond traditionally recognised groups and governance structures in particular to those who are harder-to-reach and often excluded from citizen engagement efforts.

Regeneration initiatives on high streets need to recognise the confluence of social groups present in these locations throughout both their development and delivery. Projects must be sensitive to race, gender, religion and other demographic characteristics. This principle applies whether the intervention is citizen-led or delivered by the local authority or other partners.

Citizen-led initiatives should not be assumed to be inclusive by their nature, and may need to work as hard as any other project type in order to meet this objective.

Research shows that inclusivity cannot be secured purely through formalised groups, which have varied levels of participation. Where capacity of delivery partners allows, tracking of local participation in consultation and engagement activities, events and stakeholders should be the first step towards inclusive project delivery.

When considering more traditional and institutional forms of participation, engagement levels across high street users are generally low and participation in these more visible and easily identifiable forms of engagement can be understood as correlating to social capital capacities of local populations. It is, however, crucial to appreciate different modes of 'participation' occurring across high streets outside of these traditional channels.

Participation extends to more informal and less visible forms of engagement with local individuals, groups and networks. The more informal and less visible forms of engagement relate back to some of the drivers of socio-economic value on high streets such as 'information and support' and 'trust and money'. They involve care-taking arrangements, economic agreements or information sharing.

Despite low reported levels of formal participation on the studied high streets, more informal forms of activity such as social and cooperative networks across family members, friends, ethnic groups on the street nevertheless offer key support functions to the street, its users and businesses and contribute to community binding processes. These forms of participation are often less visible, less easy to discern through online and observational research and less readily identified by respondents as forms of participation. Making use of these networks will require careful and fine-grained understanding of local communities in areas of investment, and can offer channels towards increased participation and engagement.

Participation as such should not be under-estimated or narrowly defined if people's engagement on and with their high street(s) is to be accurately captured. Types of participation and barriers to participation show some fluctuation across gender, age and ethnic groups. These variations reveal the potential for tailored approaches to increase participation across specific groups. Seniors' participation is often related to age-specific offerings, where seniors make use of 'over 60s' social groups and don't engage when these types of age-specific offerings aren't present. Teenagers and young people's participation is often tied to the education sector.

Digital channels offer new options for accessible means of engagement. The study found evidence of online forms of participation across all case study high streets, although typically not formed 'around' the high street, but rather focused on other social and geographical groups. New digital marketing tools such as promoted social media posts can target specific postcodes and may offer place-focused methods for promoting opportunities for participation as part of wider participative strategies.

To be successful and inclusive, it is important to recognise the limitations of digital means and digital inclusion issues and so draw on a range of participative tactics including digital and place-based methods to attract and engage Londoners. This work has shown that the high street presents a useful and inclusive subject with which to engage Londoners on issues of value, change and aspirations.

Suggested actions for high street stakeholders:

- Develop inclusive place-based community-led governance, targeting deprived areas and areas undergoing significant change.
- Deliver capacity building and training directly to high street stakeholder groups working to engage disadvantaged groups in existing high street governance structures.
- Gather a robust evidence base to understand local need and the demographic make up of the community using the high street in order to inform placeshaping strategies.
- Take a mixed methods approach when marketing opportunities for engagement - go beyond digital channels of communication and include face to face and place-focused methods.
- Strive to increase active citizenship of under-represented groups so they participate in decision-making and high street governance
- Recognise the presence and value of 'informal' forms of civic activity and associated networks identified in this study, rather than relying on easier to reach traditional networks and civic amenity groups.

4. Protect diversity & choice.

Choice and range of offer on London's high streets is highly valued by Londoners. Supporting diversity of offer and resisting loss of high street range is essential and needs a creative response from high street stakeholders across sectors as it is very difficult to manage through planning policy alone.

This study reveals the single most important thing to Londoners on London's high streets is choice and range of offer. It is the diversity of high streets – in terms of spatial composition, ownership and use – which offers increased resilience and adaptability to change, and also minimises the potential for exclusion in high street places.

High street vitality benefits from a range of businesses and services, chain and independent retail, public institutions, cultural institutions, health-related services, religious spaces, and places to exchange and transfer money. High street range – being a 'one stop shop' or a 'useful' place – is one of the most valued features of high streets to users. Change to high streets was most positively identified when this resulted in an expansion of the range on offer and most negatively when it was reduced.

Recent shifts in national legislation or corporate practice, such as the closure of local post offices or the withdrawal of

funding for local pharmacies, therefore have a strong impact on the perception and vitality of the street.

Surveys reveal that shops on high streets support a mix of both recent and long-standing businesses. A collection of shops with different owners meets multiple, and often changing needs and demographics. This suggests that the economic capacity of the high street, which equally performs a social function, caters for a range of existing and new communities.

Multiple ownerships on the street play a crucial role in offering variety and mix. In this sense, multiplicity acts as a positive attribute of the street by helping to retain diversity and inclusivity. The variety of employment on high streets is often matched by the variety of commodities traded on and the range of shops and workspace typologies. This variety is central to the economics of the street but also serves an important social value with such shops acting as important hubs, often supporting informal networks of information and support.

This work has confirmed that non-retail uses are key in attracting people to spend more time on high streets, with food and drink uses being a primary pull across age groups. In terms of considering elements of future resilience, this work confirms that high street approaches need to aspire to a diversified offer. This includes services and amenities beyond retail such as cultural and leisure uses in order to encourage people to spend more time on the high street.

Typical high street spatial configurations comprise multiple small units under separate ownership, further complemented by a range of various spaces for work. This research concludes that this configuration supports diversity and ultimately resilience. The spatial and legal composition of high streets is, in this sense, an asset which resists homogenisation. There is however a distinction to be made between ownership and stewardship. The study findings suggest that a spectrum of stewardship arrangements, from more formalised BID and traders organisations, through to one-off events, would be beneficial in empowering businesses and local residents. In addition, small businesses should be given assistance to keep up with changing regulations that they may otherwise find difficult to stay up-to-date with.

This research has uncovered a number of socially valuable functions being carried out in 'standard' retail and social infrastructure units. Land use classes typically categorise these units through broad 'retail' or 'non-retail' functions, but this work points to the restrictive nature of using these planning tools alone to understand the value of high streets. Future high street funding streams and support initiatives need to be aware of the multiplicity of economic and social functions that might occur in a typical 'A1' retail unit. Given the blunt nature of land use classes, the nuance of how certain uses are emerging or leaving the high street can be difficult to perceive in planning terms alone. Some of these uses are identified in this work as bellwether uses – functions which Londoners see as symbolic of the health of their local high street.

Suggested actions for high street stakeholders:

- Work with your local community to understand what the right mix is locally, recognising that each street has its own identity and attractions.
- Take into account the needs and desires of existing residents and businesses as well as emergent populations when conceiving of and delivering regeneration projects.
- Stimulate innovative solutions from the private and public sector which seek to maintain diversity of the high street offer.
- Prioritise town centre locations, including high streets, for cultural and retail uses (as opposed to out-of-town cultural districts, multiplexes or retail parks).
- Curate a diverse and inclusive offer where there is wholesale land ownership in the town centre to avoid homogenisation of offer, price point and activities.

5. Recognise the social value of high street economies.

This study has confirmed that high streets are job-rich places of work which provide a valuable source of employment for Londoners. Furthermore, this study also highlights that these economic opportunities also hold social value for Londoners. On high streets, the economic is so often also the social.

Market and non-market domains overlap on high streets, with workspaces and employment structures offering social as well as economic value simultaneously. High streets are sites of dense employment, offering both ways into work and opportunities for local suppliers. At the same time, these jobs and work sites – because of their local, clustered and shared nature – offer Londoners opportunities for face-to-face contact, provide a highly valued range of businesses and services, offer convenience and choice, and provide information and support.

In particular, high streets offer a range of low-threshold and stepping stone economic opportunities, especially to particular groups, including young people, mothers and recent immigrants. These opportunities for people to work somewhere local and familiar, sometimes with family members, allows for workplace confidence and skills to develop as well as the chance for new

entrants on the street to become socially engaged with others. High streets also offer employment opportunities for individuals with an incredibly diverse range of skills and abilities and significant opportunities for self-employment. To avoid underestimating the true economic and social value of non-residential employment space on high streets, and of convenience retail in particular, this function of the high street needs to be better championed and appreciated across high street-related policies and programmes.

This research suggests that not only do high streets offer significant and varied employment opportunities but that these opportunities are also seemingly unique (and certainly valuable), with traders travelling in from significant distances. As such, high streets offer opportunities beyond the local, attracting traders throughout and beyond London.

In addition to numerous full-time opportunities for work, high streets are places of part-time, low-barrier-to-entry and local jobs which provide opportunities for groups who might not be able to access other kinds of work in the city because of time, mobility or cultural restraints. Part-time work can be indicative of precarious work opportunities, characterised by itinerant, low-pay and often insecure employment. However, conversations with high street employees and proprietors revealed part-time work is an opportunity for first-time employment, Saturday jobs for youth and students, part-time work for the elderly (filling a social gap in their lives) and for women who need flexible part-time work.

Championing high-street focused employment opportunities has the potential to deliver economic and social value simultaneously and in a varied way. Employment opportunities will directly offer economic value to high street businesses and economic and social value to new employees, but they will also bring social benefits for high street users and visitors.

This socio-economic value found in retail activities in particular relies on high thresholds of support. Public transport networks including bus routes, train and tube stops are key not only to the connectivity of the street, but to the viability of its retail offer. In addition to transport, and streetscape improvements where needed, it is important to consider how high streets can benefit from the increased footfall that new residential development offers.

While high streets also present an opportunity to meet London's housing needs through growth and intensification, as evidenced in the GLA's 'Accommodating Growth in Town Centres', findings from this study highlight that any development on or around high streets needs to be carried out in a way that does not compromise a high street's ability to deliver both its economic and social functions.

While larger residential developments on and around high streets can be a threat to existing businesses and their premises, especially where new housing encroaches on or takes over existing commercial space, sensitively delivered smaller-scale or infill residential projects can support

the high street. Smaller, vacant high street sites may be challenging for the market to deliver due to their scale or complex ownership, but they can deliver vital localised support for high streets, and should be encouraged when they do not comprise existing high street fabric and its related socio-economic value.

Suggested actions for high street stakeholders:

- Champion the social value of the employment opportunities concentrated on high streets through advocacy and policy.
- Ensure that the opportunities created by new high street-based development offer accessible employment opportunities.
- Advocate that new development be focused on and around high street locations in order to provide thresholds of support to high street businesses and organisations, but without compromising the ability of high streets to deliver their economic and social functions.
- Prioritise high street locations for small infill development sites to stimulate activity, deliver a diversity of offer and bring footfall to other uses.
- Stimulate innovation in social aspects of employment programmes.

6. Value the contribution of high street businesses.

High streets would not exist if it were not for traders, proprietors and businesses. It is therefore vital that high street stakeholders work together to develop creative responses to financial pressures on high street businesses. There is a need to develop a better understanding of affordability from the perspective of businesses, and support community and cultural uses, and stewardship initiatives, that are suited to the local context and capacity of proprietors.

The high street is a site of high employment density. In line with existing literature, this research suggests this employment is predominantly self-employment, both part-time and full-time and in high numbers, with businesses across all three streets averaging four employees per unit.

High streets also provide a variety of employment opportunities in a multiplicity of workspaces. These opportunities are highly varied, consisting of employment for marginalized groups (low education, elderly, first time employment, women) as much as for highly educated individuals seeking full-time employment. The contribution of these jobs to London, both in number and in quality, should not be underestimated. Although some high street employment opportunities can be seen as precarious given the

varying nature of employment conditions and protections, this study has emphasised how high streets jobs provide interconnected economic and social opportunities for both long-standing communities and newcomers, which are highly valued. In light of this value, the financial pressures facing businesses across London's high streets need to be carefully considered, particularly those related to business rates. Financial pressure was reiterated across the three high streets investigated in this study, across geographies, designations and different pressures for change.

Affordability is connected to densities and thresholds of support and demographics. High streets in deprived locales struggle to meet affordability requirements. Business rates are a recurring stress, especially in light of the April 2017 revaluation, corroborated by previous research and existing literature. This research captures a remarkable variation in high street rents and shows that these rents do not correlate directly to perceptions of affordability. This suggests that notions of affordability are impacted by a wider host of influences, potentially including high street customer bases, business rates and the socio-economic profiles of proprietors. Further work should be undertaken to better understand what constitutes affordability for high street businesses as well as users.

Valuing high street businesses means developing an appreciation of the variety of workspace sizes and types offered in and around high streets. Diversity of workspaces enables a multitude of economic and social interactions, the

interdependence and complementarity of commercial and public services and ensures adaptability to changing consumption and production patterns, waves of migration and socio-economic make-up. Another valuable perspective on the contribution of high street businesses relates to the night-time offering. Night-time uses were identified as part of Londoners' aspirations for their local high streets, where the diversification and improved quality of the offering would increase usage of the high street. While some businesses open late to widen their customer base it is important to better understand the barriers businesses face to offering longer opening hours and night time offer, so high streets can fulfil their potential role in London's night-time economy.

To avoid underestimating the true economic and social value of high streets the employment function and further contribution of high street businesses need to be better championed and appreciated across high street-related policies and programmes. It is crucial that the support for high streets includes support for high street users (making high streets more attractive and valuable places for Londoners) as well as for businesses (ensuring high streets remain viable and accessible places for employment and enterprise). Measures and outputs of both existing and new businesses should be taken into account as part of this support in order to ensure that the benefits of growth are shared.

Suggested actions for high street stakeholders:

- Promote the value and support the presence of employment space on high streets through advocacy, policy and investment, including the need for affordable and accessible spaces, not just for the creative industries but also for community organisations, SME retail and independent businesses.
- Stimulate innovation and creative responses to reducing occupancy costs for high street businesses and organisations through pilot projects and promoting best practice e.g. rate relief schemes.
- Encourage behaviour change in high street businesses and organisations in terms of emissions, air quality and using active transport, for example promote sustainability in their supply chain, adapt their premises or promote active transport for their staff.
- Offer tailored property-related support to high street businesses and organisations, through supporting either BIDs or trader organisations to widen their offer.
- Better understand the barriers facing high street businesses and organisations to increasing opening hours and their night-time offer, in order to inform wider placeshaping strategies

7. Champion high streets as social, civic and cultural infrastructure.

High streets are convenient locations for traditional social infrastructures but are also perceived as social infrastructure in their own right. It is essential to understand the spectrum of social functions better so that growth on high streets does not undermine, but rather maximises this.

Londoners value high streets beyond their core utility. Opportunities for social contact and the compendium of social assets offered on the high streets are recognised and valued by users. People value opportunities for face-to-face contact and the option to participate in public life. The high street, as perceived by its users, is inherently social.

The presence of key social infrastructure sites (such as leisure centres, cultural and health facilities) offers convenience and also benefits traders as it increases footfall. In light of recent restructuring of the retail sector and competition from online retail, these uses therefore play an even more important role in guaranteeing the future of high streets and town centres.

This study has also revealed that high streets are perceived as social infrastructure in their own right. Commercial uses provide a point of assistance and provide social value for Londoners, particularly the most vulnerable, by offering medical advice,

helping with form filling, giving directions, performing translations, opening longer hours and providing informal credit. It is not just SMEs that offer social value; chain shops were also found to offer valuable social spaces, particularly for young people. In addition, high streets also provide opportunities for exchange and one-to-one socialising. The presence of shopkeepers and service providers enhances familiarity on the high street, which is especially valued by more vulnerable groups including the elderly.

Across the businesses surveyed in this work, a high number of informal 'social' services were recorded in addition to core trade. This suggests that not only is the high street a critical piece of hard infrastructure but also creates soft infrastructure networks found in shops and more formal institutions such as libraries and community centres. Any loss or alteration of high street fabric or retail space must be understood and justified in relation to both economic and social value, as the potential loss to local communities and businesses goes beyond floorspace and employment figures.

Social impact assessments, prior to investment and planning decision, can aid in this recognition, and should consider the impact on existing businesses, public and community uses. Such assessments should take into account the benefits of existing economic and social activities for business owners, employees, customers and users of high streets across dimensions of class, gender, ethnicity, age, disability and religion. Local character and heritage also need to be defined more broadly beyond the

built environment to take into account the socio-cultural make up of high streets and adjacent neighbourhoods.

Boroughs that are aiming to manage declining centres by promoting diversification of uses, improving environmental quality and accommodating housing intensification should do so in a way that does not threaten or undermine the existing social value provision of the centre/high street in question.

In line with this additional layer of 'social support' offered on high streets, efforts to consolidate core social infrastructure functions like GPs, libraries, job centres and pharmacies as well as functions like workspace, should look to high streets as the most appropriate sites. Having social infrastructure and workspace on high streets mean these local, accessible locations benefit from multiple reasons to visit. High street businesses will in turn be supported by the footfall these consolidated sites of social infrastructure bring to the street.

This report shows how both core and additional social infrastructure are embedded in high streets, and illustrates the role of high street retail and high street-based social infrastructure in providing localised social services that support wider town centre social infrastructure provision. This role should be better recognised, recorded and integrated into both town centre policies and local-level high street planning. The GLA and boroughs should advocate for the consolidation of services and workspace functions on high streets.

An understanding of soft infrastructure emanating from this study can inform research on further 'invisible' networks hosted on London's high streets. For instance, evidence from this study begins to uncover that culture on the high street manifests itself outside of traditional cultural infrastructure. The approach used in this study to understand the range and spectrum of social value high streets provide can be used to explore other key elements of high street ecosystems, like culture.

Suggested actions for high street stakeholders:

- Prioritise the location of statutory social infrastructure on high street locations, and require robust justification where this is not suitable (e.g. schools versus prisons).
- Where consolidation of core social infrastructure is required, advocate that high street locations should be prioritised in order to promote footfall to other high street uses.
- Support boroughs to better understand the 'informal' social services and networks offered by high street businesses and organisations, so they can be supported to diversify, promote their offer and be made sustainable.
- Better understand the physical and social spaces that exist on high streets, especially where these provide places for communities to mix and meet, promoting social integration and bonding opportunities within communities.

8. Value high streets as sources of civic pride and local identity.

Investment in high streets is vital to Londoners' willingness to use and spend time on London's high streets. Development and physical regeneration efforts should respond to local character and the features of a place valued by local people, contributing to a sense of pride and belonging.

High streets are smart locations for direct investment to improve the built environment, enhance public life and stimulate local economies. This study has highlighted the importance of the physical attributes of the high street to local identity and civic pride. Development and regeneration endeavours should therefore exercise care when interacting with these valuable high street features.

This study finds that high street features tied to local identity are generally those recognised as landmarks and those that support community networks. Facilities such as markets, libraries and faith institutions are perceived as vital embodiments of community due to the range of activities they host as well as their role in providing points of support, information and trust. Londoners express that such institutions should be protected, precisely because of their vital role in supporting communities and creating a shared sense of pride and belonging.

Beyond this key community infrastructure, architectural qualities and particular buildings and heritage assets are also seen as elements of value. Physical elements such as churches, the traditional high street fabric, individual buildings, and signage, were identified as representative of an area's 'local character' and further contributed to feelings of local identity and civic pride. These assets are particularly identified as warranting protection by Londoners in the context of perceived physical change in and around the high street. New development in and around high streets should respond to and enhance existing elements of the high street that reflect local identity and character.

Findings from this study further reveal that Londoners are fluent in their perception of high streets and the factors of change that are affecting them. This study highlights that perceptions of change relating to the physical fabric of the high street are linked to how Londoners feel about their area more broadly. Elements of the streetscape such as cleanliness, reported by references to street litter, bin clearance and frequency of cleaning, are identified as features which users conflate with wider trends of decline or improvement of the high street or the wider area.

This is also the case with the range of offer on high streets. The narrowing of retail offer is seen to be indicative of decline, with certain outlets and types of shops considered to provide valuable variety. Banks, food and drink offers and particular chain retail are all key bellwether uses, their disappearance from the high

street is understood as a sign that a high street is struggling. Conversely, an increase in certain types of retail is also seen as negative, including betting, charity and discount shops.

This research also finds that this narrative of improvement or decline of the physical environment is closely linked with feelings of civic pride. A number of respondents felt the messiness of the streets, along with the poor quality of shopfronts and displays represented, and contributed to, a lack of local pride within the area. Alternatively, improvements to shopfronts and street cleaning was seen as vital for the prosperity of the area. Decline of the physical environment is also associated with antisocial behaviour and crime, more acutely experienced by women.

The range of physical, community and street management issues identified by high street users as key to civic pride and local identity suggest that investment in high street improvement needs to span governance structures such as planning use classes, borough boundaries and local authority departments. Regeneration initiatives should be mindful of this holistic perspective in order to maximise perceived benefits of investment. In particular, when capital investment is made by the GLA commitment towards future maintenance should be secured from delivery partners.

Suggested actions for high street stakeholders:

- Identify key uses and places linked to local pride and identity as part of development proposals, and clearly demonstrate how proposals relate to local character.
- Invest in the physical fabric of high streets to improve their accessibility and attractiveness. This will encourage Londoners to use them more and improve perceptions of crime and safety.
- Support community and amenity groups to designate assets of community and heritage value in high street locations.

9. Champion high streets as public spaces.

Development on high streets should recognise the role of high streets as public spaces for congregation and cultural exchange, as accessible and connected places, and as locations for night-time activity.

The study findings highlight how high streets work as public spaces for congregation and cultural exchange. The services and amenities found on high streets support public life, so high streets offer the opportunity to be surrounded by people without having a specific purpose oneself, and to have casual encounters on the street. In addition, they provide space for one-to-one contact sustained through the regular use of certain shops and spaces as well as growing familiarity with proprietors and service providers. These features of the high street are especially significant for more vulnerable groups, such as the elderly.

High street 'character' and 'people' are among the top three most valued features of high streets for Londoners. 'Character' relates to high streets being vibrant and places to linger, and 'people' encompasses reported familiarity with the people on the high street, as well as the diversity of people using the high street. These findings highlight that development on high streets should recognise the non-commercial and social characteristic of high streets' public realm, one that is free to enter and connects people to people,

and people to places, both on the street and to places beyond.

This study highlights that for high streets struggling with issues of crime or perception of crime, use of the high street can be trumped by safety concerns. Tackling crime and antisocial behaviour is therefore key in promoting and increasing high street use. However, high streets were generally described as safer public environments, distinct from side streets and back alleys where actual or perceived crime had occurred.

This study also highlights the local and convenient nature of high streets, which make them both intrinsically accessible and also lends them to healthier and more active modes of transport. This study finds that a majority of Londoners walk to their local high street. This accessibility is closely linked to inclusivity, especially in relation to the elderly, or those with limited or impaired mobility who value ease of movement.

Furthermore, the range of activities and services on the high street offer regular opportunity and cause for people to visit, especially by walking. As such, high streets are a key infrastructure linked to the mental and physical health benefits associated with walking and getting out the house, including those in TfL's 'Healthy Streets' agenda. This study finds traders tend to drive to the high street in a higher proportion than users, which can be explained by servicing needs as well as by the fact that traders travel from further away. However, across all three streets the majority of traders still walk or travel by tube, overground, train or buses.

This finding further highlights the role of high streets as places of transit and connectivity, and the importance of transport connections linking the street to locations across London. This study confirms that this role of connectivity is valued in its own right.

Good transport connections further contribute to footfall on individual high streets, and with night buses and now the night tube, high streets have an increased capacity to function as valuable and accessible public spaces.

Suggested actions for high street stakeholders:

- Invest in the physical fabric of high streets to improve their accessibility and attractiveness. This will encourage Londoners to use them more and improve perceptions of crime and safety.
- Support the night-time economy of high streets, especially in areas which are part of the night tube roll out across outer London and night bus provision.
- Promote the importance of inclusive design in high streets, especially in relation to the elderly, or those with limited or impaired mobility who value ease of movement.
- Champion high streets as vital component of London's public realm to help prevent social isolation and promote healthier lifestyles. High streets should be free to enter, and should support public life through design that promotes opportunities to be surrounded by people without having a specific purpose and to have casual encounters on the street.

10. Uphold an evidence-based approach.

To ensure investment is supporting the social value of high streets for Londoners, it is important first to gather a robust evidence base to understand the place and its community, then collectively set out objectives for the future, and subsequently evaluate the impact accordingly.

The Public Services (Social Value) Act 2013 requires public bodies to consider economic, social and environmental wellbeing as related to public services, contracts and connected purposes. To engage with these multiple strands of value and understand the overlap between different domains (for example, high street economic clusters delivering social benefits), it is necessary to gather locally-specific evidence which accurately captures the social value of a given high street, or network of high streets. Once this baseline has been established, projects and programmes can work toward maximising social value through project development, delivery and evaluation.

As a first step, social value should be incorporated into procurement processes on high street and town centres. In addition, measures of social value should be used to develop funded projects and programmes to ensure they are considering the prosperity, people and place potentials of the work. Ultimately, social value objectives and metrics should

be used to evaluate high street projects and programmes.

Qualitative methodologies are crucial to considering the 'invisible' social aspects of places and projects. Support for front-end research in GLA regeneration programmes will allow projects to better respond to their socio-economic context. This may require limited early release of funds to support the necessary resources for such exploration during the brief development stage. In contrast, facilitating learning across London requires key indicators to be structured and adopted. Consideration should be given to a framework of key indicators to be measured at project inception, both to inform project trajectories and allow for future evaluation.

This research provides insights into the forms of social value that are supported by high streets. It provides inputs into scoping and monitoring workflows, highlighting challenges and recommendations for future policy evaluation. The central findings from the empirical analysis are first, that people value the social not just the economic in high streets; second, that there is a core of common social value found across high streets, as well as locally specific costs and benefits; third, that many of the mechanisms that generate social value are likely to be hard to pick up using conventional secondary data; and fourth, that respondents are pretty good at 'reading' high streets, and understanding both the complexity of high street ecosystems and change processes. What does this imply for scoping out and monitoring social value in high streets,

and for evaluating specific interventions?

At the scoping stage, the key finding is that people value the social affordances of high streets, not just the economic ones. This analysis provides a starting point for specifying what 'good growth' conditions look like in a given high street: a rich mix of retail and leisure activities; a mix of market and non-market services; good transport connectivity; rich social interaction valued by residents and visitors; economic opportunity for proprietors and residents; frictions between competing uses and users minimised.

What to measure is likely to involve a mix of GLA-level monitoring metrics (for cross-project comparability) and project-specific outcomes, developed in consultation with local stakeholders. For monitoring social value across London, the key starting point might be the core social value 'bases' identified across the three case study high streets. This provides the basis for a social value baseline. However, as some of the mechanisms that generate social value are likely to be hard to pick up in secondary data, proxies from existing data will need to be combined with new analysis, using a combination of revealed preference and stated preference techniques in order to evaluate the social value of high street projects and programmes accurately and holistically.

Following the Green Book (HM Treasury 2011), the GLA and partners should explore multiple methods for capturing these trickier aspects of social value, and compare results to better understand what different metrics include or leave out. The fact that our respondents are good

at reading high street complexity and change should give us confidence about developing social value metrics derived from asking people directly to value having (or not having) a given high street offer, or particular aspects of that offer.

Suggested actions for high street stakeholders:

- Share best practice in social impact evaluation of regeneration projects by publishing best practice guidance and promoting the use of high quality case studies.
- Gain finer grain understanding of high streets and communities, through qualitative research methods and participative objective setting at the scoping stage of projects.

BIBLIOGRAPHY

- Carmona, Matthew. "London's Local High Streets: The Problems, Potential and Complexities of Mixed Street Corridors." *Progress in Planning, London's local high streets: The problems, potential and complexities of mixed street corridors*, 100 (August 2015): 1–84.
- Centre for Retail Research. "Retail in 2018 - Shop numbers, Online and the High Street", 2017. <http://www.retailresearch.org/retail2018.php>.
- Clossick, J. "High Street Case Study: Tottenham High Road," 2012 https://www.academia.edu/1532513/High_Street_Case_Study_Tottenham_High_Road.
———. "A Discussion of Planning and Planning Projects in Tottenham," Chapter 4, Submission for RD2 2014 https://www.academia.edu/11318960/Planning_and_Planning_Projects_in_Tottenham
- Flockhart, A. (2005). "Raising the profile of social enterprises: the use of social return on investment (SROI) and investment ready tools (IRT) to bridge the financial credibility gap." *Social Enterprise Journal* 1(1): 29–42.
- Foxton, Frederick, and Richard Jones. "Social Capital Indicators Review." Office for National Statistics, 2011.
- Greater London Authority. "A City for All Londoners," 2016. https://www.london.gov.uk/sites/default/files/city_for_all_londoners_nov_2016.pdf.
———. "Accommodating Growth in Town Centres: Achieving Successful Housing Intensification and High Street Diversification," 2014. https://www.london.gov.uk/sites/default/files/gla_migrate_files_destination/AccommodatingGrowthInTownCentres2014_2.pdf.
———. "Action for High Streets." London, 2014. https://www.london.gov.uk/sites/default/files/GLA_Action%20for%20High%20Streets.pdf.
———. "Culture on the High Street." London, 2013. https://www.london.gov.uk/sites/default/files/culture_on_the_high_street_july13.pdf.
———. "Good Growth Fund", 2017. https://www.london.gov.uk/sites/default/files/good_growth_fund_prospectus.pdf.
———. "High street jobs and workplace analysis", 2017. GLA Intelligence & Analysis Unit.
———. "Learning from London's High Streets." London, 2014. <https://www.london.gov.uk/what-we-do/regeneration/regeneration-publications/learning-londons-high-streets>.
———. "London Plan - draft Town Centre policies," 2017.
———. "Outputs and Outcomes Handbook London," 2015.
- Gort Scott, and UCL. "High Street London." London, 2010.
- Griffiths, S., L. Vaughan, M. Haklay, and C. E. Jones. "The Sustainable Suburban High Street: A Review of Themes and Approaches." *Geography Compass* 2, no. 4 (July 2008): 1155–88.
- Griffiths, Sam. "The High Street as a Morphological Event." In *Suburban Urbanities*, 1st ed., 32–50. Suburbs and the Life of the High Street. UCL Press, 2015. <http://www.jstor.org/stable/j.ctt1g69z0m.10>.
- Hall, Suzanne, and Ayona Datta. "The Translocal Street: Shop Signs and Local Multi-Culture along the Walworth Road, South London." *City, Culture and Society, The London Plan 2000–2010: A Decade of Transformation*, 1, no. 2 (June 2010): 69–77.
- Hall, S., King, J. and Finlay, R. (2016). 'Envisioning Migration: Drawing the infrastructure of Stapleton Road, Bristol', *New Diversities*, vol.17, no.2. pp. 59–72.
- Hall, S., King, J. and Finlay, R. (2016). 'Migrant Infrastructure: Transaction economies in Birmingham and Leicester, UK', *Urban Studies*, pp. 1–17.
- Hall, S., King, J. and Finlay, R. (2015). *City Street Data Profile on Ethnicity, Economy and Migration on: Rookery Road, Birmingham; Stapleton Road, Bristol; Narborough Road, Leicester and Cheetham Hill, Manchester*, four ESRC reports, LSE, December 2015.

Hall, S.M (2015-). Super-diverse Streets: Economies and spaces of urban migration in UK cities. ESRC research project.

———. "City, street and citizen: the measure of the ordinary Routledge advances in ethnography." 2012. Routledge, London, UK. ISBN 9780415688659

———. "High street adaptations: ethnicity, independent retail practices, and Localism in London's urban margins," 2011. *Environment and Planning A*, 43 (11). 2571-2588. ISSN 0308-518X

HM Treasury (2011). *The Green Book: Appraisal and Evaluation in Central Government*. London, HM Treasury.

Just Space. "Towards a Community Led Plan for London -Policy Directions and Proposals," 2016. <https://justspacelondon.files.wordpress.com/2013/09/just-space-a4-community-led-london-plan.pdf>.

Just Space, and NEF. "London for All! A Handbook for Community and Small Business Groups Fighting to Retain Workspace for London's Diverse Economies," 2015. https://justspacelondon.files.wordpress.com/2015/09/workspacehandbook_highres.pdf.

Mulgan, G. (2010). "Measuring Social Value." *Stanford Social Innovation Review* Summer: 38-43.

Public Services (Social Value) Act 2012. <http://www.legislation.gov.uk/ukpga/2012/3/enacted>

Scott, Fiona. "High Street Productivity." In *Suburban Urbanities*, 1st ed., 204-22. Suburbs and the Life of the High Street. UCL Press, 2015. <http://www.jstor.org/stable/j.ctt1g69z0m.17>.

Transport for London and Mayor of London. "Healthy Streets for London," 2017. <http://content.tfl.gov.uk/healthy-streets-for-london.pdf>

Vaughan, Laura, ed. *Suburban Urbanities: Suburbs and the Life of the High Street*. UCL Press, 2015.

Warbis, M. and T. Parsloe (2017). *Understanding high streets from the user perspective*. London, GLA Intelligence.

With input from:

Michael Edwards, Just Space

Illinca Diaconescu, Just Space

Jane Clossick, The CASS

Nicola Bacon, Social Life

Acknowledgements

Greater London Authority
Erin Byrne
Jamie Dean

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

WE MADE THAT

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Holly Lewis
Hannah Martin
Melissa Meyer
Penelope Seguin
Max Worrell

LSECities

Suzanne Hall
Julia King
Fizzah Sajjad
Conor Morris
Rashee Mehra
With key input from
Max Nathan
Just Space

Placeworks

Sarah Jarvis

All photographs by Philipp Ebeling
unless otherwise stated

Drawings and diagrams copyright of
We Made That and LSE Cities

© Crown Copyright and database right
2017. Ordnance Survey 100032216 GLA

With thanks to all those who gave their
time to contribute to this report