

Perception of the High Street Report

Introduction

In 1794 Napoleon famously described England as "a nation of shopkeepers". He was complimenting the fact that hard-working, local, small-scale, productive enterprises provide jobs and serve the community.

It's hard to imagine quite what the expansionist Emperor would have made of the state of our high streets in 2023. Given his observation, perhaps he'd have felt that we'd be having something of an identity crisis given the speed with which busy stores from ten years ago now lie empty?

It doesn't take an outsider's eye to see the state of our high streets for what they are today: in need of some deep and radical rethinking and repurposing for our needs and preferences in 2023 and beyond.

In and of themselves, of course, high streets have no pre-ordained right to exist. What is it about them that needs "saving"? And can they be "saved" or do they need to evolve?

Our sense is that what people want to save is a sense of identity, purpose, community and individuality, which means that Droitwich differs from Dunmow, and that Cardiff and Croydon are different, both reflective of their local communities.

Rather than guessing how people feel about our town centres, we asked them. A survey of just over 2,000 British adults on a series of questions relating to the state of the high street. This whitepaper contains some of what we've found and some of our opinions about how things might be improved.

Key findings

"In decline"

Our local high streets are perceived as in decline by a significant minority of respondents to our survey.

43 percent of respondents said they thought the bricks and mortar retail sector was in decline in the UK, and 38 percent reported that their high street was a shell of what it used to be.

38 percent said their high street was full of closed shops, one-quarter (25 percent) said their high street was rarely busy, and one in five (20 percent) said there was little reason to visit their high street any more, as all the good shops had gone.

Nathan Peacey, Partner and Head of Retail & Consumer at law firm Foot Anstey says:

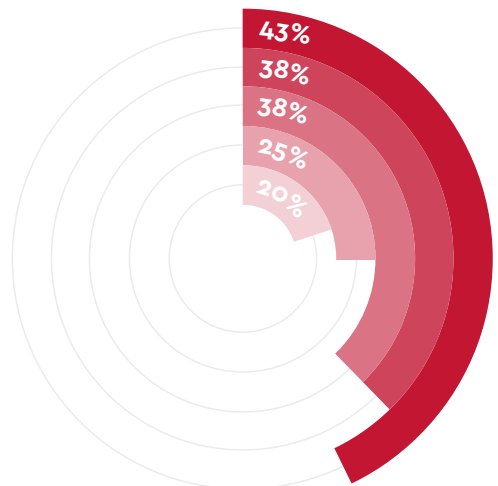
"Our respondents had an emotive response to the town centre changes that they've seen. The phrase 'a shell of what it used to be' is one that should be a red flag to local planners and politicians, and be of significant concern to retailers who want to be part of the town centre experience.

"Some shops will appear and then disappear as fads and trends rise and fall. Changes to the UK's vaping regime may well see some of those stores go the way of gambling shops and bubble tea cafes before them.

"But that emotion also tells us that yes, people will look online for a bargain, but that they are looking for something that moves them when they come to town centres."

What the public think...

- 43% "bricks and mortar retail sector is in decline"
- 38% "high street is a shell of what it used to be"
- 38% "high street is full of closed shops"
- 25% "high street is rarely busy"
- 20% "little reason to visit high street any more, as all the good shops had gone"



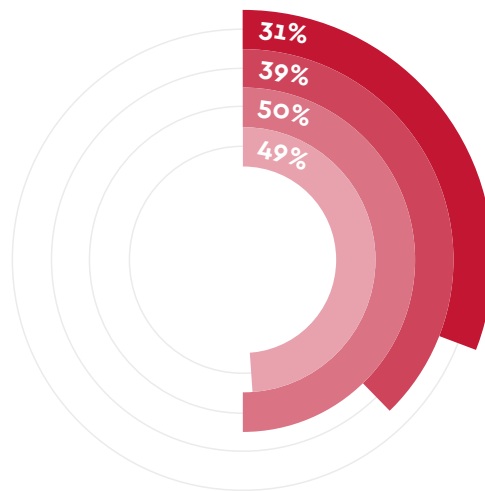
Age affects opinions

Age is definitely a factor when it comes to perceptions of the high street. If today's situation is all you've ever known – then you're less likely to think that the high street is in decline: only 31 percent of 18 to 29-year-olds believe that the retail sector is in decline, compared to 39 percent of 30 to 44-year-olds, 50 percent of 45 to 59-year-olds, and 49 percent of those aged 60 and over.

Likewise, only 22 percent of 18 to 29-year-olds thought their high street was a shell of what it used to be, compared to 32 percent of 30 to 44 year olds, 47 percent of 45 to 59 year olds, and 49 percent of those aged 60 and over.

Percentage of the public that think the high street is in decline:

- 31% 18 to 29-year-olds
 - 39% 30 to 44-year-olds
 - 50% 45 to 59-year-olds
 - 49% 60-year-olds and over
-



The majority of respondents in three major cities felt that their town centre was a shell of its former self: Sheffield (55%), Norwich (52%) and Plymouth (51%).

Nathan says:

"There was clearly a golden age of the high street that affected 45-59-year-olds and to almost the same extent the over 60s. I don't think it's just a question of reminiscing either – those age groups will have experienced the height of 80s and 90s consumerism when the high streets were buzzing, and before online retail took off after the advent of the smartphone.

"Lots of town centre retail complexes were built and at the height of their powers in this period, and when you took into account modern department stores too, there was greater variety and choice than had been available to the generation above in the war/post-war era.

"Equally, harking back to that era is not necessarily going to take us forward as our tastes have moved on. If we think about the pandemic legacy – it's that people wanted to feel connected with others again. Town centres need to recapture that vibe and provide a fun place for people to spend time together."

Hindrances

Respondents to our survey stated that the high street is struggling due to a combination of higher rents, business rates and lack of Government and police support.

40 percent of those surveyed said that they believe the decline in the high street can be attributed to rent being too high for commercial property there. While 35 percent blame business rates for the shop closures on their local high street.

Are town centres safe and is that putting people off spending time there? Almost three-quarters (73 percent) of respondents said that they do not feel enough is being done by local and central government, and the police, to help high streets thrive and be safe places.

It's been emotional

The majority of Britons (73 percent) claim to have an emotional attachment to their local high street. In fact, four in ten (40 percent) admit to feeling very sad when a shop closes on their high street, 33 percent miss the days when they could buy everything they needed from their local high street, and 31 percent said they felt very unhappy when big retail chains close down, as they were often played an important part in their lives.

Age plays a role in how much people miss how their high street used to be. Just 28 percent of 18 to 29 year olds said they felt sad when shops on their high street closed, compared to 35 percent of 30 to 44 year olds, 54 percent of 45 to 59-year-olds, and 51 percent of those aged 60 and over. Nathan commented that:

"73% of our fellow Britons have an emotional bond with their local high street, which goes to show that our high streets are more than just commercial hubs; they're integral to our collective psyche.

"It's not just about convenience; it's about community. One-third of us harken back to the days when our local high street had everything we needed, while the same fraction deeply mourns the loss of major retail chains that have been cornerstones of our lives.

"The changing face of our high streets leaves a sense of longing in many. About 23% of Britons feel a void, missing the high street they once knew, which has now transformed beyond recognition.

"It's clear that for many, the high street is a repository of cherished memories and shared history."

Emotions attached to the public's local high street



High street hypocrisy?

Nathan highlights however that:

"There's a strong disconnect here where, despite our respondents asserting a strong emotional connection to their high streets, only one-fifth (19 percent) admit they feel guilt for not spending more time and money in their local high street.

"And that's the crux of the issue that all parties with an interest in the high street have got to solve: what is going to bring people to the town centre? What is going to prove economically viable for consumers, landlords and occupiers? What would provide a strong enough emotional pull to overcome financial motives for going out of town or remaining at home?"

Antisocial behaviour and harassment on the high street:

Patrick Howarth, employment Partner at Foot Anstey says:

"It's deeply concerning to see that over a third, specifically 34%, of Britons have observed antisocial behaviour right outside the shops on their local high streets. This issue seems particularly pressing in Sheffield, where almost half the residents, 48% to be precise, have had such encounters."

"It's not just about unruly behaviour. A significant 31% have reported drug use and street drinking on their high streets. Add to that the 27% witnessing graffiti and the same proportion seeing antisocial behaviour inside the shops. It paints a worrying picture of our once cherished retail hubs."

"Shoplifting is another pressing issue that cannot be ignored. Over one-quarter of us, 26%, have witnessed it firsthand on our high streets. The numbers are even more concerning in cities like Manchester at 34%, London and Edinburgh both at 30%, and Leeds at 29%."

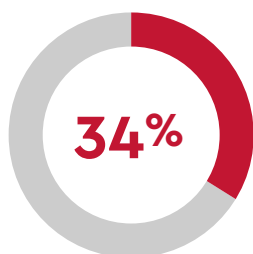
"Retail staff being harassed is another disturbing trend. It's quite alarming that 21% have noticed such incidents, and cities like Belfast, Newcastle, Liverpool, and Sheffield are witnessing even higher percentages, nearing the 30% mark."

"With all this in mind, it's sadly unsurprising that 28% of the populace once had a fondness for their high street but now find it less inviting. The heart of our towns and cities should be welcoming, not places of trepidation."

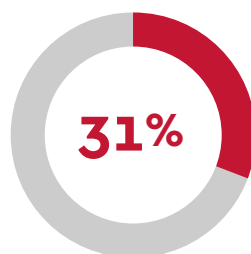
"Perhaps most distressingly, over a fifth of Britons, 21% to be precise, no longer view their high street as a safe space. For those of us in retail and finance, this is a clarion call to work collaboratively, bringing about change and ensuring our high streets remain both vibrant and secure."

Nathan comments that "Our view at Foot Anstey is that dealing with the challenge of increased harassment and abuse of shop workers is multi-faceted, so not easy to fix."

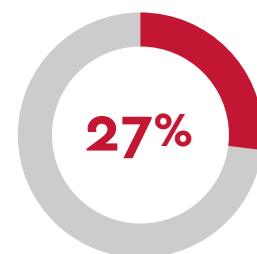
High street observations of the British public



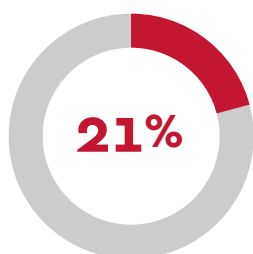
have observed antisocial behaviour



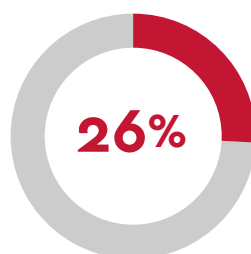
have reported drug use and street drinking



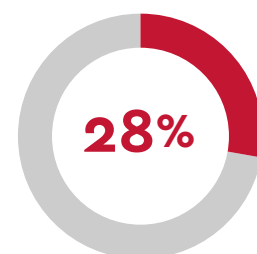
have witnessed graffiti



have noticed retail staff being harassed



have witnessed shoplifting firsthand



were once fond of their high street but now find it less inviting

"First, we'll need to renegotiate the social contract and address a societal level issue of poor behaviour. We see that in store as well as at festivals, sporting events, on public transport and in theatres.

"That's arguably an ocean too big for the Retail Sector to boil on its own. But Sharon White's suggestion of a Royal Commission could make it a part of the challenge to be overcome to address the decline of the high street. A move towards a kinder society.

"Perhaps the situation in-store would also be ameliorated by strengthening the law with a specific offence relating to front-line workers, such as those that already exist in Scotland? The announcement, debate and eventual adoption of a new offence would help UK society to reset what is acceptable behaviour. It would also form the basis of a new relationship with the police and authorities, encouraging reporting and improving police response times.

"We've seen examples of this in action already, where pubs often conjoin to ban serial troublemakers and retailers work in partnership locally to achieve similar outcomes. One such initiative in West Sussex led by Police and Crime Commissioner Katy Bourne has caught our eye as has the award-winning approach of the Business Improvement Districts in Bristol where retailers, the BID and local police collaborate to address anti-social behaviour.

Patrick adds that "The solutions aren't easy for retailers, and they will need to address a host of issues in order to produce better outcomes: better training, security, technology, and store layout all play a part. As a firm, we have a Retailers Against Harassment certification which helps retail employers demonstrate that they have attempted to tackle these issues and show employees they take it seriously."

Public support for a Royal Commission on the High Street

One recently floated idea is, however, gaining traction and admirers from within our respondent base. Seven in ten (70 percent) of Britons think a Royal Commission, as suggested by John Lewis CEO Dame Sharon White, would be a good way to revive the high street. Only 10 percent of those polled said it wouldn't be a good idea.

Nathan says that:

"Clearly, the precise remit and duration of a Royal Commission is essential to understand. What is it aiming to achieve and are those objectives SMART? But by suggesting a Royal Commission, Dame Sharon has elevated the debate above the upcoming 2024 General Election issue and made sure that all parties who have an interest in the future health of our high streets are welcome at the discussion table."

Conclusion

Foot Anstey's survey suggests that all is not lost for the High Street. Whilst clearly facing challenges there is an opportunity to tap into a latent demand (and perhaps create a demand in younger generations). In conclusion, Nathan Peacey emphasised, "A Royal Commission might provide a framework, but we see no reason to prevaricate. The time to act is now. Our high streets are at a pivotal juncture, and with the right strategies and collaboration, we can ensure they remain vibrant, safe, and integral to our communities. It is essential that retail communities see and experience strong local leadership which prioritises and identifies their local high streets. This kind of leadership should set out to offer local high streets as key destinations to visit and coordinate with planners, retailers, Police and Business Improvement Districts (BIDs) to create high streets that are future proof and fit for purpose in the 21st century."



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