

Summary Note - Commission on Retail Conservation, and Case Studies (Retail Distinctiveness and Promotion of Independent Retail in Town Centre)



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CONTENTS

1	SUMMARY NOTE - COMMISSION ON RETAIL CONSERVATION (2007) - ‘A BALANCE OF TRADE - EVERYONE CAN HELP’, PREPARED FOR ROYAL BOROUGH OF KENSINGTON AND CHELSEA.....	1
	Background.....	1
	RTP Sample Survey	1
	Key Findings of the Retail Commission Report.....	2
2	RETAIL DISTINCTIVENESS AND PROMOTION OF INDEPENDENT RETAIL IN TOWN CENTRES - SUMMARY OF DESK-BASED RESEARCH.....	5
	Case Study 1: Birmingham - independent business promotion and proposed S106 use	5
	Case Study 2: Haslemere - Loyalty card scheme amongst independent retailers	5
	Case Study 3: Guisborough - Assessment of ‘distinctiveness’ of town centre commissioned by RDA.....	6
	Case Study 4: London Borough of Islington - review of local shops’ concerns and improved working with Council	7
	Case Study 5: Shrewsbury - Retailers United Forum and Transactional Website.....	8
	Case Study 6: East Cambridgeshire/Huntingdonshire - Business Training for Independent Local Retailers	9
	Case Study 7: Colchester - Consultation with Independent Retailers on Regeneration Proposals.....	9
	Case Study 8: London Borough of Merton - Retail Mentoring	10
	Additional information Sources	10

1 SUMMARY NOTE - COMMISSION ON RETAIL CONSERVATION (2007): 'A BALANCE OF TRADE - EVERYONE CAN HELP'¹

Background

- 1.1 The Royal Borough of Kensington and Chelsea Council (RBKC) has set up a Retail Commission² to look into the issue of the erosion of independent retailers from shopping streets in the Borough, amid concerns that *'small shops could be wiped out in less than a decade'*. The Commission investigated whether *'councils could do more to preserve their shopping areas and reduce the cloning effect all too apparent on major high streets'*.
- 1.2 The Council recognises the main problem as being one of a lack power to address the issue: 'The Council knows that residents face the loss of the sort of local traditional shop that serves their everyday needs but it is forced to look on as shopping areas change due to a lack of powers...the result of all this is that shoppers from home and abroad looking for something different are faced with the same chains and their facades dominating the high street'.
- 1.3 The Commission, in preparing its report, considered three key questions:
 - how to get the right balance between popular/chain stores, smaller/specialist shops, boutiques and restaurants;
 - what new ideas and (possibly) legislation can help to *'balance market powers with the needs of local communities'*; and
 - whether local retail areas can be protected in a similar way to buildings.
- 1.4 The Commission aims to *'provide advice on how to save the character of the Royal Borough's town centres - centres which support a diversity of shops and cafes. The hope is that the work of the Commission could lead to the protection of this Borough's...local retailers but also those in villages, towns and cities throughout the Country'*.
- 1.5 The findings of the Commission were published in May 2007, and are considered below.

RTP Sample Survey

- 1.6 RTP undertook a survey of six shopping centres in RBKC in December 2006³, and drew a number of interesting conclusions regarding the relationship between multiple stores and independent retailers:
 - Whilst centres have not been losing retail units, the proportion of multiples in larger centres in the Borough had risen, with demand existing from further retailers - this applied particularly to Portobello Road, Earl's Court Road and Holland Park Avenue.
 - Multiples were often small-scale, London-based chains.
 - Possible trend towards food-and-drink retail, including coffee shops.

¹ Undertaken for Royal Borough of Kensington and Chelsea Council;

<http://www.rbkc.gov.uk/BusinessZone/general/balanceoftrade-fullreport.pdf>

² April 2007 RBKC Newsletter,

http://www.rbkc.gov.uk/rbkcdirect/rdstreetscene/ss0704_story01.asp#sectionfour

³ <http://www.rbkc.gov.uk/BusinessZone/general/localshops-crc.pdf>

- Opening of small-format convenience stores by national multiples has impacted upon smaller grocery chains and independent grocery stores, rather than specialist retailers such as butchers and bakers.
- Amalgamation of units was taking place, but mostly by existing retailers, and only one amalgamation in each centre became occupied by a multiple retailer. Over the same period three 'disaggregations' took place.
- Property prices were rising faster than sales growth, with rents often increasing to a level which small independent retailers were unable to afford. One-year rises of 20 per cent took place in Earl's Court and 15 per cent in Portobello Road.

Key Findings of the Retail Commission Report

- 1.7 The report conveyed different perspectives on establishing a balance of trade from a variety of interest groups, including residents, supermarkets, small retailers, landlords, investors and retail analysts. The Commission also received a number of comments regarding current involvement by local authorities in local retail policy and development, with suggestions pointing towards local authorities taking a more assertive role in the future. In summary, the contributors considered that local authorities:
- have retail in a '*silo*', and tended to neglect to involve other agencies, other local authority departments, or the community/voluntary sectors; and retail strategy was not linked with other initiatives;
 - tended only to meet retailers and landlords to negotiate over specific projects - it is noted that *'more dialogue was needed around the mix local authorities would like to see and what landlords wanted. There should be a forum where different sectors could discuss the balance of incentives and regulation that was required to achieve shared objectives for a town or shopping centre'*;
 - struggled with *'how, or whether, brand retail could bring lasting benefits and not destroy the existing fabric'*, and
 - lacked plans for economic development of deprived areas which were not defined town centres.
- 1.8 The report makes a number of recommendations that public and private bodies would take to improve the balance of national and independent retailer representation, as well as enhancing the character and vitality of neighbourhood shopping areas. At national level, recommendations include:
- Use Classes Order - allowing small shops⁴ to have a separate Use Class, with the GPDO amended to allow change of use from large shop units to smaller units, but not vice versa. An additional Use Class should be provided for coffee shops and internet cafes, with changes from these to general A1 permitted but not vice versa;
 - abolition of upward-only rent reviews for new leases; and
 - planning permission to be required for the merging of a small shop unit with another unit.
- 1.9 Worthy of note are the recommendations made to RBKC, which also apply to other local authorities; these include:
- Community Strategy - giving *'increased attention to retail needs and supply when reviewing their Community Strategy and in preparing a Local Development Framework'*;

⁴ Small shops are classed as those with a net ground floor area of under 80 sq.m.

- Local Partnerships - monitoring, and where possible influencing, the retail mix in areas where there are many property owners;
- promoting consultation between developers, retailers and residents during all stages of a major retail development, in order to *'establish the optimum mix of uses and unit sizes, and designs appropriate for the neighbourhood'*;
- retail 'neighbourhood watch' - encouraging the maintenance of high standards of repair, cleaning, etc, through local partnerships;
- introduction of free 30 minute parking metres in local shopping areas, in order to encourage the use of local shops by more people;
- encourage the retention of existing, and entry of new, small shops under 80 sq.m net in their shopping centres;
- negation through a S106 agreement, *'whereby the presence of a major store or stores is offset by a levy to support independent retailers located nearby'*; and
- establishing 'maximum quotas' for particular uses by area, or by centre, where the retail mix is under threat.

1.10 Thirdly, a further set of recommendations is made solely to RBKC; nevertheless the suggestions made are salient and therefore worthy of note as they could potentially be applied elsewhere:

- preparation of vision statements for centres in the Borough, with a priority towards shopping areas which are in transition from a *'distinctly local to a more uniform character'* (namely in RBKC Portobello Road, Notting Hill Gate, Earl's Court Road and Brompton Road);
- funding the appointment of a 'champion' for shopping centres, to *'network and inform groups concerned about the sustainability of their local centre(s)'*;
- *'Recognise and respect in its Local Development Framework, the amenity, diversity and character of its 46 retail areas'*; and resist (again, through the LDF) the loss of local amenity and retail use in defined local shopping centres;
- review and 'tighten up' the number of non-retail uses permitted in retail centres, including estate agents, internet / phone shops and coffee shops;
- ensure closer joint-working between Council departments (planning, regeneration, valuation etc) in approach to retail and economic development matters;
- affordable retail - *'Require, through a Section 106 agreement, that developers gift a proportion of small units in a new retail development to the Council to manage as affordable retail units, in the same way that developers construct housing units for registered social landlords to house low-income residents'*;
- encouragement of street and farmers' markets;
- develop retail directories (online and published) listing shops in the Borough, *'including specialist shops, markets and adjacent visitor attractions'*;
- conferencing - *'Host a Borough retail conference, perhaps under the auspices of the Community Strategy, to contribute to visions for Borough centres and share good practice from elsewhere'*;
- funding of expertise to establish/manage a Borough-wide service for provision of advice on starting and sustaining a small retail business; and
- require high quality design in new shopfronts; and provide grants to restore or enhance shopfronts within and outside conservation areas.

1.11 The report continues to detail advice for landlords, supermarkets and other chain stores; and the small and independent retailers themselves. It is acknowledged that

whilst many of the recommendations are RBKC-specific, *'many of the issues we have grappled with will resonate elsewhere in the country'*

2 RETAIL DISTINCTIVENESS AND PROMOTION OF INDEPENDENT RETAIL IN TOWN CENTRES - SUMMARY OF DESK-BASED RESEARCH

- 2.1 The case studies below present a review of attempts made by regional, county and local planning authorities and/or independent retailers and organisations to promote retail 'distinctiveness' in their town centres, and in particular the fostering of independent, local shops. The information was gathered from desk-based research in June 2007; Internet links to the sources are provided where appropriate.

Case Study 1: Birmingham - Independent Business Promotion and Proposed S106 Use

- 2.2 Some 59 retailers in Birmingham city centre have signed up to be part of a free promotional campaign under the 'Unique Shopping' banner. The campaign is designed to ensure that the city's independent retailers do not get 'swamped' by the recent major retail developments which have taken place in the city centre. The promotion has been carried out by Birmingham City Centre Partnership, in conjunction with Marketing Birmingham. The 59 retailers feature in a free leaflet dedicated to promoting independent retailers, with each retailer listed by address, type of goods sold, and shown on a map. The promotion is also featured on the Be In Birmingham Internet site.
- 2.3 Birmingham City Council is also considering the use of planning gain deals with developers to subsidise space for independent retailers in the city centre. The Council is aiming to improve entrepreneurialism as well as increase the diversity of the city's retail offer, in order to increase its vibrancy and attractiveness to visitors, and is considering using Section 106 agreements to subsidise rents for independent retailers. Proportions of retail space and levels of subsidy would be agreed for each individual scheme.
- 2.4 Birmingham City Council is looking to pilot the scheme in the City Centre, and will consider rolling the scheme out to the remainder of the city if successful.

Further information:

- 'Unique shopping' promotional leaflet: http://www.birmingham.gov.uk/Media/BrumShopTrail10547AW.pdf?MEDIA_ID=71228&FILENAME=BrumShopTrail10547AW.pdf
- Be In Birmingham Internet site: www.beinbirmingham.com
- Regeneration and Renewal (18 May 2007), 'Birmingham eyes up retail subsidy'

Case Study 2: Haslemere - Loyalty Card Scheme Amongst Independent Retailers

- 2.5 The market town of Haslemere has created a successful 'loyalty card' scheme which enables small independent retailers to work together. The scheme has been developed by the Haslemere Initiative Group, the town's Chamber of Trade and Waverley Borough Council to produce the 'Haslemere Rewards' Loyalty Card. The scheme presently has support from over 30 businesses, and roughly 4,500 cards are in circulation, with businesses in the town centre giving collectable points or discounts on production of the card.
- 2.6 Haslemere's promotional Internet site states that the Rewards scheme is '*one of many innovative projects introduced by The Haslemere Initiative for the benefit of the local community. The Haslemere Initiative brings together the business community, local government and community organisations to enhance the vitality of the area. This latest project results from consultation with the Haslemere community and aims to benefit local shoppers using participating outlets whilst stimulating the local economy in and around Haslemere*'.

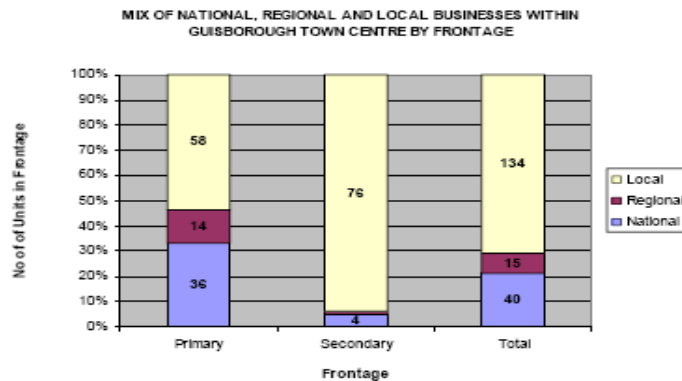
- 2.7 The Action for Market Towns Internet site comments that '*The town loyalty card scheme appears to have worked well and shoppers are reporting that there is a 'certain sparkle' in Haslemere that was not there previously...Many shops have been renovated and new businesses have begun to trade. Some of these new businesses have seen the value of working with other more established retailers and have joined forces on the scheme*', and the card is cited as being a driver behind increased footfall in businesses in the town.

Further information:

- Haslemere Rewards: <http://www.haslemere.com/rewards/index.php>
- Haslemere Internet site: <http://www.haslemere.com/>
- Action for Market Towns: http://www.towns.org.uk/newsmaster/t_news_info.php?refnum=1027

Case Study 3: Guisborough - Assessment of 'Distinctiveness' of Town Centre Commissioned by RDA

- 2.8 Miller Research led a consortium of consultants in producing a series of 'Market Town Retail Distinctiveness Reports' for Regional Development Agency One North East in 2006, including a report for the market town of Guisborough (Redcar and Cleveland District), which is classed as a District Centre.
- 2.9 The report comments on the methodology and its view of the role which national retailers can play in retail distinctiveness; the comments appear to reflect the similar concerns of Charnwood Borough Council: '*In order to achieve retail distinctiveness in market towns, it was important to achieve the right balance in relation to range and choice for both local people and visitors. The existence of national retailers in market towns was therefore not identified as a threat but an opportunity if the right scale and level of complementarity is achieved*' (our emphasis).
- 2.10 Guisborough town centre is anchored by a Morrisons supermarket, as well as a number of 'traditional' small-town anchor chains such as Boots, Boyes Department Store, Mackays and Dorothy Perkins, as well as banks and newer additions such as Cafe Nero. The range of shops and services overall is seen to be limited, and independent retailers trade on the edge of the main shopping area, and in secondary shopping streets. However, as with many market towns, '*constraints for attracting suitable national retailers in the future are the size of the frontages and footprints of the buildings, with the exception of those premises around Morrisons, are very scarce*'.
- 2.11 The study finds that in addition to national retailers, regional occupiers are also positioned within primary shopping frontages, with local retailers filling the remaining small, vacant units in primary areas '*that are not desirable for larger operators and do not have adequate servicing or storage space*', local retailers also have a 'very strong presence' in Chaloner Street, Fountain Street and Bakehouse Square in the town centre. Overall local retailers account for the majority of units in both primary and secondary areas, with, as would be expected, a particularly strong presence in secondary areas.



- 2.12 Vacancy rates in the town centre were identified as being low (5 per cent), with vacant premises located solely in primary retail areas. Rental rates were up to £50 per sq.ft in primary levels, and £35 per sq.ft in secondary areas.
- 2.13 The 'distinctiveness' of the town centre was measured through a number of indicators grouped under five headings, as detailed below.
- **Physical/aesthetical** - criteria including assessments of townscape and streetscape; shop front facades and shop window displays;
 - **Visual retail survey** - assessment of provision of key market town visitor attractions (gifts, arts/crafts, books/antiques, speciality foods, home items, and outdoor activity goods), as well as assessment of the distinctiveness and accessibility of the independent sector, through factors such as opening hours (i.e. late/Sunday openings), shop floor goods, and amount of local/specialist goods on display;
 - **Independent food and drink** - assessment of provision of key visitor attractions (tea/coffee shops, public houses, restaurants/wine bars and sandwich bars), as well as visual survey including opening hours, sourcing of local food and mixture of food/drink premises;
 - **Markets** - assessed factors include traders, customer base and relationship with the town; and
 - **Customer care** - assessed through 'mystery shopper' visits, including shopper greeting, knowledge of products and 'added value'
- 2.14 Guisborough scored relatively highly on its provision of independent retailers, customer service and markets, but fell short on the physical make-up of the town. The overall distinctiveness score was lower than that of the pilot towns of Alnwick and Barnard Castle. A number of conclusions were made on local independent retail:
- The clustering of local independent shops served to build a good reputation for specialist independent shopping.
 - Almost 50 per cent of local shops tended to display local or specialist products, but these were found to be often 'hidden' amongst the wider retail stock rather than promoted;
 - The Church Street area of the town has potential to be a 'strong niche retail quarter', but suffers from a lack of physical connection and poor visibility from the primary retail area; and
 - The town centre has a number of 'iconic' shops which remain unknown to visitors due to their isolated locations.

Further information:

• Miller Consulting report:

<http://distinctiveness.onene2dev.raki.enigmainteractive.net/lib/liDownload/10229/guisborough%20survey%20report.pdf?CFID=5623127&CFTOKEN=87541132>

Case Study 4: London Borough of Islington - review of local shops' concerns and improved working with Council

- 2.15 The London Borough of Islington has introduced, as part of its sustainability committee, a review into supporting local shops in the Borough, following feedback from traders about a lack of involvement in the Council's decision making process. The SC review into local shops in the Borough, it is hoped, will lead to improved working between the Council and small shops. Improvements proposed include a dedicated business support team, and an increase in town centre managers.
- 2.16 Six principal areas of concern for local shopkeepers in the Borough were identified, although resisting competition from national retailers was not amongst the listed

concerns. The areas of concern were given as parking, street cleanliness, crime and safety, financial matters (e.g. rental values), general support, and promotion of local areas. The latter point is of interest: surveys conducted by the Committee indicated that people valued the high levels of service in local shops, and enjoyed taking advantage of the specialist shops the Borough had to offer. However the committee concluded that more work needed to be undertaken to *'promote and brand shopping centres across Islington, encouraging people to travel from area to area to take advantage of the unique shops in different areas'*. The two larger centres in the Borough, Angel and Nag's Head Town Centres, were seen to benefit in this respect from town centre management schemes, which smaller centres did not have.

- 2.17 Local retailers surveyed demonstrated a keenness to work in partnership with the Council to promote local shops in Islington. Best practice observed by the Committee included leaflets produced by local shops in the Amwell Street area promoting the local retail offer.
- 2.18 The committee concluded with a total of 17 recommendations for improving support for local retailers, including:
- Establishing a business support unit to act as a first point of contact, promote good practice and offer advice. The unit should also foster good communications with local retailers, and work towards better understanding and engagement between parties.
 - Continued support from the Council for local shops, and ensuring this is built into the LDF. Furthermore, *'the planning service should look at ways of protecting retailers and formulate a local retail strategy addressing the needs of small businesses'*.
 - Local shops should be made more aware of services provided by the Council, and other organisations, from which they may benefit.
 - The Council should *'do more to publicise, brand and promote local shopping centres, including making people aware of what services are available in an area - information to be made available in appropriate languages, large print format, etc.'*
 - Establishment of a 'responsible traders' scheme, to promote/share best practice amongst local shops.
 - Town centre management should be extended, *'employing peripatetic town centre managers to service areas where there are clusters of shops'*.

Further information:

• Report of Sustainability Committee:

http://www.islington.gov.uk/DownloadableDocuments/Business/Pdf/helping_local_shops_final_report.pdf

Case Study 5: Shrewsbury - Retailers United Forum and Transactional Website

- 2.19 Shrewsbury town centre has seen the development of Retailers United, *'a trade forum for retailers to network, develop marketing and training schemes, and, of critical importance - to connect with the local councils to participate in plans that affect the trading environment'*. Retailers United is therefore a dedicated network solely for retailers and restaurateurs in Shrewsbury town centre.
- 2.20 Retail-led regeneration is cited as being the most significant contributor to economic growth in Shrewsbury in recent years, and the town is presently making efforts to *'become a more attractive retail destination for discerning shoppers'*. The group comments that *'Shrewsbury town centre is famous for the hundreds of independent shops located alongside its 'big names'. The homogenous High Street look has yet to scar this ancient town centre and Shrewsbury has, so far...retained its uniqueness'*.

Retailers United states that there are upwards of 600 independent retailers in the town centre which add to its attraction.

- 2.21 The organisation has recently launched an online portal for the town's independent retailers called 'All the Little Shops'. The e-commerce website will contain a range of goods on sale solely from the town's independent retailers. Individual businesses submit 20 products a month, which are displayed in a 'virtual supermarket' on the website. Retailers United comments that the site *'combines e-commerce for independents alongside strong promotion of Shrewsbury itself. Visitors to the site would be tempted to visit the town and offers and incentives would be created to draw more shoppers to Shrewsbury'*.
- 2.22 The scheme has been sponsored by Shropshire County Council, which proposes to roll out the scheme to other market towns in the county if proven to be successful. The site has been developed by Retailers United in partnership with local web design company BeVivid, and Shropshire Enterprise Partnership.

Further information:

- Retailers United: <http://www.retailersunited.co.uk/documents/Traders%20Meeting%2029%20March%20-%20News%20Release.doc>

- All the Little Shops: www.allthelittleshops.co.uk

Case Study 6: East Cambridgeshire/Huntingdonshire - Business Training for Independent Local Retailers

- 2.23 Action for Market Towns and the East of England Development Agency produce an annual 'best practice' guide for Market Towns in the region, with support from upwards of 70 towns, some of which were initially supported through the Market Towns Initiative scheme introduced in 2000. The group, Market Towns East, campaigns to keep market towns high on the regional and national agenda. A particular scheme which has taken place during 2005 which is of note is the PRIDE scheme, funded by East Cambridgeshire and Huntingdonshire District Councils. The scheme cost £51,000, and was funded by the Councils in conjunction with EEDA. The scheme delivers a programme of free business training to retailers in Cambridgeshire, comprising sales, marketing, visual merchandising, customer case and retail security, which served to provide *'necessary skills to help businesses flourish in an increasingly competitive local market. The project also provided the opportunity for business people to develop local contacts and share experiences with others'*.
- 2.24 The courses were promoted with the aid of Town Centre Management Initiatives in the towns of Huntingdon, St Ives, St Neots, Ramsey and Ely. A further six 'Ambassador Days' were held for employees of local independent businesses with customer facing roles, with the intention of promoting a 'network of ambassadors' who were able to actively promote each market town, and provide information about facilities and services available there.

Further information:

- Market Towns East 2006 Best Practice Guide: <http://www.markettownseast.co.uk/docs/Best%20Practice%20Guide.pdf>

Case Study 7: Colchester - Consultation with Independent Retailers on Regeneration Proposals

- 2.25 Colchester Borough Council undertook targeted consultation with independent retailers in Colchester town centre on plans for the regeneration of the St Botolph's Quarter in the town centre in 2005. Consultation was organised through the Colchester Independent Retailers group, and was intended to obtain targeted opinion from independent businesses as to what the expected effects of the redevelopment would be. Almost 200 independent retailers were consulted, with 70 providing a response. Key issues which were identified including a largely positive reaction to the

development of new retail units and a new Visual Arts facility; and concern over the impact of construction work on business levels. The Group identified a number of mitigating measures which would assist in this respect.

Further information:

• Colchester Borough Council: http://www.colchester.gov.uk/news_det.asp?art_id=2477&sec_id=27

Case Study 8: London Borough of Merton - Retail Mentoring

- 2.26 Promotion of independent retailers is being developed through Town Centre Management schemes in centres in the London Borough of Merton. The centres of Mitcham and Morden are particularly dominated by independent businesses, many of which were found to be experiencing difficult trading conditions and increasingly vulnerable to changing retail patterns, as well as a general lack of investment. The Borough has submitted a successful external funding bid to the European Social Fund in order to fund a retail 'mentoring' scheme for independent businesses in the centres of Mitcham, Morden, Colliers Wood and Raynes Park, which the Borough is hoping to subsequently extend to the remaining local shopping centres and parades, many of which are in decline.

Further information:

• Merton Town Centre Management: <http://www.merton.gov.uk/towncentman.pdf>

Additional information Sources

Retail Enterprise Network

- 2.27 The Retail Enterprise Network (REN) acts as umbrella organisation for four different initiatives which together aim to *'protect the small retail sector in unique but complementary ways'*. The overall aim of the REN is to *'protect and promote diversity in the small retail sector...to give strategic direction and a voice to the fragmented but key part of our economy'*. The REN operates through the promotion of activities which will increase economic or personal effectiveness of small shops, as well as improving job satisfaction, reducing inequality and discrimination, and *'helping to encourage more people to have their own retail outlet'*.
- 2.28 The REN is 'growing in stature' amongst *'retailers, those who support retailers and those that influence related policy'*. The REN was involved in the production of the influential 'High Street UK 2015' report, published in 2006.

Further information:

• Retail Enterprise Network: <http://www.retail-network.org>

• High Street UK 2015: <http://www.retail-network.org/upload/download.asp?file=HighStreetBritain20150.pdf>

Council for Protection of Rural England - 'Market Towns: Losing their Character?' (2004)

- 2.29 The Council for Protection of Rural England (CPRE) published the *'Market Towns - Losing their character?'* report in 2004, although the full report appears to be no longer in the public domain. The report voiced concerns that small market towns in England were *'in danger of losing their most vital asset - their character and distinctiveness'*. The CPRE conducted a health check of 100 market towns during 2003, finding that many were *'threatened by bland and uniform new development with nothing local about it'*, with traffic congestion and stretched services often a related effect, or were struggling to compete with out-of-town developments, or new retail facilities in larger nearby centres.
- 2.30 Of note are the 20 towns which the report identified as demonstrating good practice in retaining character, although none of the 20 were without their problems. The towns identified were:
- Alnwick;

- Barnard Castle;
- Cirencester;
- Easingwold;
- Faversham;
- Frome;
- Guisborough;
- Holmfirth;
- Longridge;
- Ludlow;
- Maldon;
- Market Bosworth;
- Oakham;
- Saffron Walden;
- Sandwich;
- Sheringham;
- Skipton;
- Sleaford;
- Tavistock; and
- Wimbourne

Further information:

- RICS Summary of CPRE report - 'Blandness affects Market Towns':

<http://www.rics.org/Environmentalandlandconsultancy/Planninganddevelopment/Blandness%20affects%20market%20towns.html>

