PUBLIC**F**IRST

Town Centres and High Streets

Survival and Revival

Town Centres and High Streets

Survival and Revival

A report by Public First for ABF / Primark
December 2020

PublicFirst 💬

Contents

A note on Primark

This report was commissioned by ABF/Primark to understand consumer views and attitudes on business rates and the value of town centres and high streets in Britain. Although ABF/Primark were delighted to give us their permission, this report is authored by Public First and the views and findings expressed throughout are our own.

The most interesting insight in this research was the deep bond people have with their towns. Their civic pride is an important part of their identity, and if a town is not doing so well, then that impacts negatively on its residents and how they feel about themselves. In the same way that people feel that their town says something about who they are, there is a large group of people who feel the same about Primark. People who love to shop at Primark feel that it too is part of their identity. One woman said "I'm a Primani person" with the same sense of pride with which she told us that she came from Birmingham. She was very much not alone in this.

We publish this report against a backdrop of a retail crisis in our towns and a much wider conversation about the future of high street shopping. One argument being made is that Covid-19 is merely expediting an unstoppable trend from shopping in stores to shopping online. While internet shopping has been a lifeline for many people during lockdown, our research has found that the experience of shopping online and shopping in store are so different as almost to be incomparable. Not only do people do it for different reasons, one does not exclude the other. High street shopping is here to stay.

It is therefore not a paradox that Primark, a bricks-and-mortar store only, is the largest clothing retailer by volume in the UK and continues to form a focal point on our high streets. This is because the physical shopping experience is just that – it is about meeting friends and family, bumping into other people you know, touching and feeling things and trying them on before buying. People really cared about this before Covid-19 forced us into lockdown and it is what some people are yearning to get back to – physically being with others enjoying the same experience.

It also explains why 36% of people in our total polling sample waited for the shops to open after the first lockdown before buying clothes again rather than buying them online. This is true of more than 50% of Primark's core customers, and while affordability is an important reason for this, people like to touch, feel and see the things they buy. As we found in our opinion research, shopping as a way to be with other people, really matters.

Primark has almost 200 stores around the UK. It may not be on every high street, but it is in those towns that political parties have been most interested in and which are likely to be a focal point for some time to come. Whether these are in the former so-called Red Wall constituencies or whether they are town centres that were struggling most before they were hit by a global health pandemic, Primark is the shop that came up time and again in our focus groups as the only reason why they still go into their town centres. They will go into other shops once they have arrived, but Primark is what gets them there in the first place.

The world has been hit hard by Covid-19. Many people have lost loved ones and many businesses will not be opening their doors again. Retail is not the only sector to see very large-scale job losses, but what we found in this opinion research was that high street shops were more than just places to buy things. They are seen as a barometer for how well (or badly) a town is doing.

Shops should, therefore, feature at the top of the agenda for anyone interested in the levelling-up agenda with Primark and its customers valuable partners in contributing to the discussion. Many town centres and high streets will need help to weather the storm. It is, though, important to remember that every town is unique and so are the people who live and shop there. What they have in common is that they want to have a say about the future of their towns.

Introduction

At the time of writing, the UK is emerging from a second national Covid-19 lockdown with several vaccines on the horizon but with certain parts of the retail sector in serious crisis. While there is now real optimism that life will start returning to some form of normal by Easter, the outlook is not so rosy for high street shops and jobs. The stores and high streets that were struggling before the pandemic are in full existential crisis now.

Our opinion research allowed us to identify some very important themes and we therefore include proposals and recommendations for how town centres – especially those in the post-industrial North and Midlands – can avoid the worst permanent scarring and start to work more positively toward their futures.

For these areas, the pandemic was not the cause of the original decline, but it has, without a doubt, accelerated a process already underway. Although lockdowns have forced some people onto the internet for the first time and although some of those people will now continue internet shopping, this does not translate into an automatic switch from in-store to online. Nervousness about Covid-19 is keeping people at home but that does not mean people are not longing to get back to the physical shopping experience. They are – because online shopping just cannot replace it.

This report shows that 'going shopping' is an extremely important part of many people's social lives and identities. Interestingly, this is true across the age ranges. There were some social demographic differences but it was true of younger and older people. Going shopping matters to them. The question is: how can we help the shops that are left in some of these towns survive and, after the pandemic is under control, how can we help to bring high streets back to life again? How can we get those people who really love shopping safely back into our town centres and shops, and how can we give them the confidence that, for now, they are lacking?

On the basic point of survival, people are desperate that their high street shops are given any lifelines that will help see them through. The top answer in our survey was a cut in business rates – but anything that will reduce the direct costs on shops was welcome. After that, and when it is safe to do so again, anything that will bring people back into town centres would be warmly embraced.

2021 should be the year where we are all, physically, together again. This is what so many of us have missed. We have been separated from our loved ones, but also our wider communities. All of the events that people build their lives around – fireworks, markets, shows, just going for a day out shopping – have been banned outright or become pale shadows of themselves. There is an opportunity for Government to help towns re-open and to do so as part of a celebration of being able to come together again. The public don't see this as requiring complex solutions – they just want the basics like cleaning up streets and parks, helping towns put on events for people to see and do, and by encouraging people back into shops again. This is what the Levelling Up Fund should be for.

This *really* matters because high streets are an essential part of town centres and their diverse collection of shops are the jewels in their crown. Town centres form an essential part of people's civic pride – and the way they feel about their high streets is reflected in the way they feel about themselves. The yardstick is the number of shops that are open or boarded up. Once a town starts the spiral of decline, it is hard for people to see how it can pick up again. Shops close, anti-social behaviour rises, people keep away because high streets are regarded as dangerous, and more shops close. This is seen as devastating to the heart of communities and importantly, to people's sense of identity and civic pride.

This is, of course, what the levelling-up agenda is all about. But a note of caution: no-one in our focus groups had heard of the phrase 'levelling up'. They could not guess what it meant and did not like it much when it was explained to them with the connation that their towns were 'down'. They liked the concept behind the phrase but not the phrase itself. This leads to another important insight: every town is, and feels to the people who live there, unique. They want to tell Government what they want to improve the places they love. They do not want to be told by Government what they need.

When people are asked about what they would like to see in their towns, they become highly engaged and animated. There is a real appetite among people who love their towns to help them turn around. Part of this is motivated by their civic pride and wanting their towns to be places that they want people to visit but it's also because they are desperate to get back to normal again, to go out in the way they used to, to meet people and be together again.

There is an opportunity for Government to help celebrate not just the end of the pandemic once an effective vaccine has been developed, but to help people get together again to celebrate the towns they come from – whether that's their industrial and cultural heritage or to catch up on the missed firework displays and pageants.

But for anyone who wants to demonstrate that the fortunes of a town are changing, it is the shops that need to be brought back to life. That, more than anything, will tell a town that it is back on the up again.

Executive summary

ABF/Primark commissioned Public First to conduct extensive opinion research on people's view of their high streets, local town and city centres. These were our findings:

1. **People feel real civic pride in their towns, but that pride is dented when their towns are in decline.** People care deeply about their towns. Where they come from and where they live is a core part of their identity and how they see themselves. When asked where people think of their identity as primarily coming from, the top answer was their 'village/town/city' with the second answer as the United Kingdom. When they see their towns in decline, they feel embarrassment and shame. This is especially true in struggling towns in the English North and Midlands, places that have been promised will be 'levelled up'.

2. **They have never heard the term 'levelling up' and don't like its connotations of their town being 'down' but they do like the idea behind it.** No-one in our groups had heard of the term 'levelling up' and they did not think much of it when it was explained to them. They liked the idea behind it, though, of leveraging funding into town centres to improve them. It's an important lesson for Government that if they want to talk to voters in these towns, they need to use language that speaks to people in words they understand – and they should let people tell Government what they want rather than have Government impose what Westminster thinks towns need.

3. **High streets are the heart of a town and shops are the jewels in their crown.** In these towns, people measure decline in part by the number of shops that are closing – and what, if anything, they are replaced by.

   Shops are the beating heart of a town which stops when the shops shut. When asked what people would most like to see on a high street of a new town they move to, people's top answers are shops. 48% said supermarkets and 37% said affordable clothing chains. The future of shops and their longer-term viability, therefore, should really matter to a Government that has promised to level-up the North and Midlands. Every shop closure should ring alarm bells in Whitehall.

4. **Declining towns were already on life-support. Lockdowns have pushed them into critical care.** These post-industrial towns, found particularly in the North and Midlands (something that we also found in coastal towns), were really struggling before the lockdown with empty shops and deserted town centres which are also blighted by ongoing, low-level anti-social behaviour. They have been on a downward spiral for many years. Reversing that trend, making town centres safe places to go, cleaning them up, making them look nice with things like hanging baskets, and opening up boarded-up shops and markets again are easier said than done, but are essential if people are to see their town centres come back to life again.

   People in these areas are desperately worried that their towns will not make it through lockdown. They feel that they lack the resilience of thriving towns like St Albans, for example, and need more help to get through this period of lockdowns.

5. **Covid-19 has pushed many in-store shoppers online for the first time, but that doesn't mean they'll stay there.** Our opinion research, particularly our focus groups, found that people shop online and in-store for such different reasons that in many cases, the two experiences are not comparable – nor mutually exclusive. People shop online because they think of something they need, go online and buy it. It is about the item. When shopping in person, this is usually done as a social activity, being with people, meeting up with friends and family and bumping into others. For this group, shopping is closer to visiting family for Sunday lunch. It's fundamentally about being with people.

6. **People are still very nervous about going shopping.** There was, though, even after the first lockdown lifted, real nervousness about going to the shops again, either because of catching the virus themselves or passing it on to others. Before the second lockdown we found an outright majority of people (52%) say that they are nervous or very nervous about going into shops compared with 45% who say they are confident. This, more than anything, can only be overcome if people feel that it is safe to shop, and that is something that Government and stores can work together on to bring back that confidence. One suggestion in the focus groups was a Shop Out to Help Out scheme while shops continue to put social distancing and sanitising measures in place – as they have already done.

7. **They are desperately worried that their towns won't make it through the lockdowns but really want their shops to survive. People really want to help turn their towns around again and make them places to be proud of.** When we talk to them about how they would like their towns to look and what they need to make them thrive again, people become very animated. They are full of ideas and positive visions for the future and making their towns places that people want to visit – places that they can be proud of again. Keeping business rates low, and anything else that cuts the costs to shops, was a popular starting point but we propose other measures – both shorter and longer-term.

   In the focus groups people also talked about getting to town centres as well as what to do there once they had arrived. Parking charges and improvements in public transport came up with predictable regularity but so did the fact that people wanted to have enough variety of things to do to warrant the trip – green spaces and museums, events and markets were all frequently mentioned by groups across the age, class and geographical spectrums.

Recommendations – help people get together again

Our recommendations are all designed to help encourage people back into town centres and high streets once it is safe to do so, and to make sure they like what they see when they get there. To do that, we must address the five core areas that we found people feel negative about:

1. Shops' revival

- The Government has just announced that local councils will have the discretion to allow extended and 24-hour opening times in the run up to Christmas and beyond;
- For 12 months from the ending of tiered restrictions, Sunday Trading laws should be relaxed, on a local authority opt-in basis. Those 12 months will be critical for shops;
- A 'Zero VAT' week should be introduced following the vaccine roll out at Easter to get people back into the habit of town centre shopping again.
- Business rates should be reduced and simplified in the same period.

2. The events and places that celebrate towns – use of the Levelling Up Fund

The Government's new Levelling Up Fund should include the ability to support community events that bring people together in towns and celebrate their distinct character. This could include:

- Local markets;
- Town events and attractions that are linked to the town's past and history;
- Encouraging local authorities and academy chains to integrate visits to town centres into their primary school curriculums and providing resources for them to do so;
- Offering grants as part of the 2022 Festival of Britain celebrations, so that local museums can run educational events in their area;
- Local beautification projects, such as installing hanging baskets across the high street.

3. Clean, safe town centres

A number of our participants were depressed at the lack of cleanliness of their towns, and at how monuments like Cenotaphs had been mistreated. Again, this is an opportunity to use their various funds to tackle the biggest issues people have identified. This could be supplemented by:

- Relaunching National High Street Perfect Day and renewing clean up funding;
- Raising the fixed penalty charge for littering;
- Investing in street furniture, lighting and public toilet facilities in town centres.

Alongside tackling uncleanliness, they should give people confidence that it is safe to use town centres. That means tackling crime and anti-social behaviour by:

- Increasing police presence in town centres at weekends;
- Dealing quickly with graffiti and vandalism;
- Supporting retailers to invest in security measures such as CCTV.

4. Getting into towns

If people cannot get into town centres because parking is limited and expensive or because buses are infrequent and expensive, those centres will die. There is an opportunity for the Government to tie their levelling up agenda and their green agenda by supporting green transport options that are designed around town centres:

- The manifesto promised "We will keep bus fares low, bring back and protect rural routes, and speed up your journeys." The National Bus strategy needs to lay out how this will happen not only in rural areas, but in towns and their outskirts.
- Using parking charges to encourage behaviour rather than raise revenue, for instance, by offering free or reduced parking charges for electric vehicles with enough charging points.

5. Local ownership – use of the Towns Fund

People are more likely to use their local town centres and high streets if they feel a sense of ownership over them. The Government should:

- Ensure that regeneration schemes have the backing of the local community by requiring bids for grant funding to demonstrate backing by residents and retailers. The current Towns Fund already requires some form of local consultation, and the new Levelling Up Fund suggests local support, but it is unclear how much say local residents, as opposed to other stakeholders, get.

Methodology

Primark commissioned Public First to conduct ten focus groups and a 15-minute poll of 1,005 UK adults, ensuring a nationally representative poll. The focus groups were recruited in pairs in each area and they were conducted online via Zoom. We recruited primarily in towns and cities which are known to be struggling. In addition, we recruited two 'control groups' in St Albans against which to test the others. This allowed us to see if the views expressed in the struggling towns and cities genuinely were different.

The groups always had a mix of men and women. Across the groups – but of course varied by location – we ensured a mix by age, ethnic background, social background and political leaning. This was to ensure the sample was as representative of the debate on the future of the high street, and as representative of the current political status in these places, as possible.

The groups were selected as follows:

- 1 October 2020 two groups in each town: St Albans and Walsall.
- 15 October 2020 two groups in each town: Birmingham, Sunderland and Derby.

The quantitative research was carried out online between 10 and 13 October 2020. Data was weighted by interlocking age and gender, subnational region and NRS social grade to be representative of national proportions.

Public First is a member of the British Polling Council and abides by its rules.

In detail: Restoring civic pride

Civic pride is real. People love the towns from which they come. They are rooted in their communities and are immensely proud of them, especially the people who we spoke to in the North and Midlands.

> *When I go abroad, I always say that I'm from Birmingham and everyone's heard of it. They've heard of the cars and they always say: 'Bournville chocolate!' That actually makes me really proud to come from Birmingham.*
>
> **Retired and shielding man, Birmingham**

We found that people's identity is intimately connected to their local towns so when they see their high streets in decline, it has an impact on people's sense of self.

Where do people think of their identity as primarily coming from?	
Village / town / city	**22%**
United Kingdom	19%
Country within the wider UK (i.e. England, Scotland, Wales, or Northern Ireland)	17%
County	16%
Nearest City	6%
Region	6%
A different country to the UK	4%
Don't Know	8%

I love the fact I'm from Derby, but it's embarrassing to actually be in Derby at the moment. It's changed so much and just hasn't had the attention so it's in decline.

Woman in her twenties, Derby

It breaks my heart – the cenotaph, that's supposed to show off the town centre and that's where you've got all the druggies, sitting on the sculpture thing. Before you see the cenotaph, you see the drunks and druggies.

Young mum, teaching assistant, Walsall

The fact that these voters identify so strongly with their towns – and are feeling their civic pride dented by the state of their town centres – is therefore of huge political importance. 'Levelling them up' will largely be about seeing positive change in these town centres – and that means supporting shops. Stores in these town centres are at the heart of this and their political importance has never been greater.

But this comes with a caveat. While Government and policy-thinkers talk about 'the levelling up agenda', this is not something that people have heard of, nor can they guess what it is when they hear it. Responses in our focus groups ranged from a maintenance worker in Walsall saying, "What's that when it's at home?" to asking "Does that mean the council wants to build more high-rises?" in Birmingham. What they really didn't like was the connotation that their towns were 'down' but they did like the concept behind the phrase. So if Government wants to improve town centres, it should say so – and crucially it should ask residents what they want rather than tell them what they need.

When we asked people in our polls and focus groups what it is about a town that indicates whether it's thriving or dying, people say "shops". In our polling, 23% of respondents said that their area was getting worse, not better. When we asked why they thought that was, 48% said because the shops and businesses on the high street were closing down ahead of 47% who said that it was because of crime and anti-social behaviour.

That was in their local area. When we asked about their nearest big town or city, 31% said that they thought it was getting worse, not better. Of those 64% said it was because of shops and businesses closing on the high street as opposed to 49% who said it was due to crime and anti-social behaviour.

Shops really matter and people in our focus groups described the downward spiral, so difficult to reverse once it starts: the shops start closing, people stop coming, anti-social behaviour increases and becomes much more visible, fewer people come in for shopping, making shops even less viable and they end up closing.

Both in the focus groups and in the polling, there were some important demographic differences. The perception that their local area was getting worse over the last five years was stronger among lower-middle and working-class Conservative voters in towns. Conversely, the people who think that their area is getting better tend to live in cities and are younger.

It is this group of working-class voters in declining towns that we focus on here. In our focus groups with those people who felt their towns were in steep decline, there was a strong sense of nostalgia for how their towns used to be. Interestingly, this was across the age groups, from younger to older, so it was not about looking at an old-fashioned past through rose-tinted glasses but remembering a time that was in people's living memories. At heart there was a burning desire to have their bustling shops and markets back. It was seeing their town centres busy and being together with lots of other people that they missed.

I wish it was a bit more like it used to be. More independent shops. The market. That was lovely. Now, unless you want a bowl of fruit, you wouldn't go to Walsall. They used to have one of the biggest markets in the country and it was chock-a-block. Now, there's nothing there. There's a nice warm atmosphere when there's people. It's just empty now.

Security guard, Walsall

In the town centre, Walsall used to be a lovely place to go to. Twenty years ago, there were about 40 or 50 shops open and only one or two were shut. Now, you can count the number of shops that's open. You can count them on one hand.

Older stay-at-home mum, Walsall

I've only lived here for a few years but even in that time it feels like things have changed for the worse. There's just no life or spark here anymore.

Younger male, Derby

I feel really connected here but it's not really the town centre. It's the shops that's got a community feel. Not saying they don't need an upgrade. They do.

Woman in her fifties who came to live in Birmingham as a child from Jamaica

In detail: High streets are the heart of a town and shops the jewel in the crown

One of the strongest messages that came out of this opinion research was how important high streets are to the health of a town centre – and that the barometer by which people measure if their town is declining or thriving is shops, both the numbers of shops that are open and the kinds of shops on the high street.

We selected the locations for our focus groups to compare town centres that have experienced serious decline with those that have, until recently, been thriving or middling. When we talk about towns and town centres, the conversation inevitably narrows down to the high street – but it is emphatically not the only aspect of civic decline they focus on. In the declining town centres, many worry about the lack of security there. There is also a feeling that they just look tatty and run down; there is a sense of a spiral of decline.

It just needs someone to care for the place. The parks are nice but they're full of litter and druggies – not places you'd take the kids.

Account manager, Birmingham

To get Walsall turned around, they need to do something on security and anti-social behaviour. The look of the place is appalling. It's a shame. It's a waste.

Older stay-at-home mum, Walsall

There is a lot of places in Derby town centre that I wouldn't even feel safe walking in during the day, let alone at night. The homelessness and open drug taking, it makes you feel nervous to walk about in.

Older male, Derby

The places that people really liked to visit, the towns that were thriving, on the other hand, looked like they were cared for with hanging baskets, busy shops and clean streets.

> *Bloxwich they've put flowers on the railings and that's really made a difference. They've put purpose-built market stalls and that's really brightened them up. What brings a place down is empty buildings.*
>
> **Older stay-at-home mum, Walsall**

> *Walsall needs a general facelift. Lichfield, for example, it's nice and clean.*
>
> **Chauffeur, Walsall**

But everything, ultimately, revolved around shops. This was particularly evident in our national polling. In other recent polling, we have found retail really matters to people and is what they look for on a high street when they move to a new area: from supermarkets to corner shops to the local Post Office (figure 2).[1]

Figure 2: What would people most like to see on the high street of a new town they move to?

---
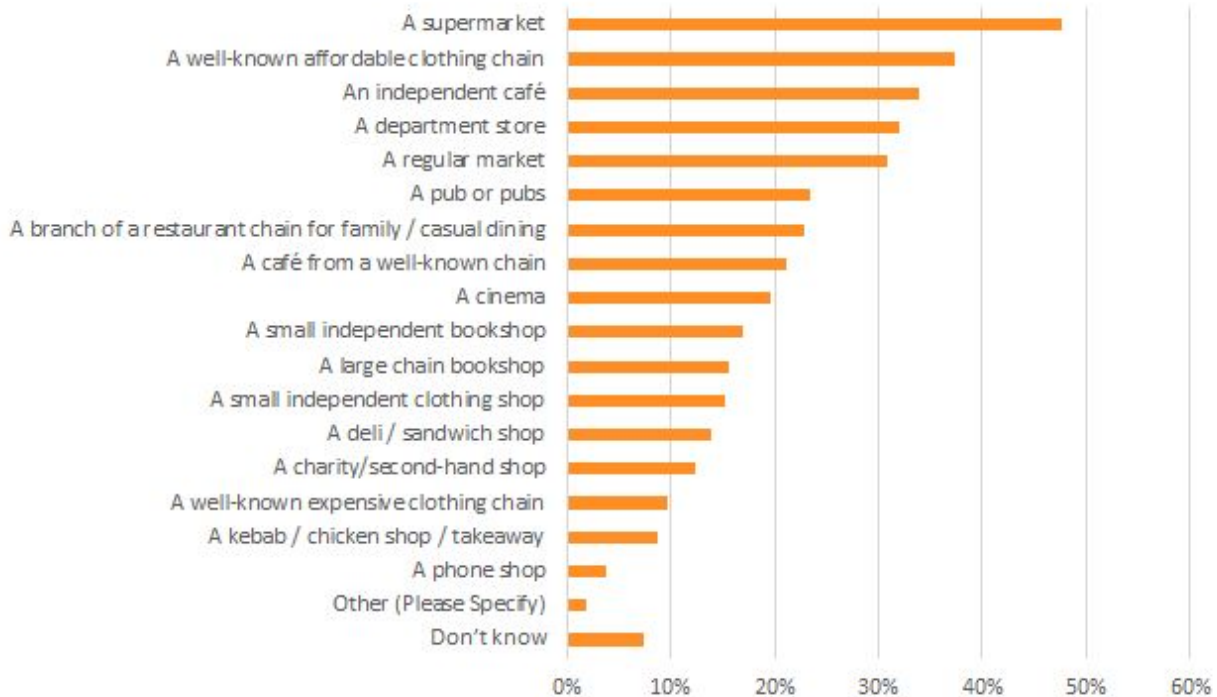
[1] See also our recent polling at [The Impact of the Post Office – The Economic and Social Impact of the Post Office](https://postofficeimpact.publicfirst.co.uk/#c2) which also found that shops score more highly than train stations, parks, libraries, and gyms

In detail: Some towns were already on life-support before Covid-19

Unfortunately, these towns have been in decline for a very long time. Where more affluent towns with thriving centres, shops and markets have more in-built resilience, these Northern and Midlands towns were hit with lockdown when they were already on life-support. It means that there is a case to be made that if the Government wants to level-up, then helping these shops must be a priority. They cannot take the shock of lockdown in the way that wealthier towns will be more able to absorb.

The truth is that these declining town centres have long ago stopped being destinations for people. If they wanted to go shopping or go out, they would visit Birmingham, Stratford, Lichfield or Newcastle – not their own town centres.

I honestly don't know why you would go shopping in Sunderland – you can just walk through it to get to the Metro to go shopping somewhere else.

NHS maintenance worker, Sunderland

I just avoid the town centre. I don't like it. Not how it looks, how it smells [of drains], the people that hang out there. Don't like it.

Security guard in his early thirties, Walsall

I go to Lichfield town centre. Brilliant high street – you walk around and think this is a brilliant town centre. You go to Walsall and you think, I really want to go home.

Construction worker, Walsall

If these towns were struggling before, the national and local lockdowns have pushed them over the edge. There is real gloom among people about the future of their towns and, knowing as we do how intimately their feelings about their towns are connected to their civic pride and the ways in which they see themselves, lifting that gloom and giving people hope is going to be vital.

To be honest, Derby was already struggling before the virus. This has just sped things up, I guess. I think it's going to be hard to see how we recover at all.

Woman in her fifties, Derby

The city centre is suffering the brunt of the Covid shutdown. A lot of places were shut down but it's definitely getting worse because of Covid – it's in a dangerous place now.

NHS maintenance worker, Sunderland

This has only been exacerbated by the lockdowns keeping people from visiting their town centres and high street shops because they are nervous about Covid-19. In spite of the safety measures taken by shops, there will need to be a concerted kick-start to get people back into the physical shopping habit again – and crucially to make them feel that it is safe to do so.

The table below is taken from our polling after the first national lockdown and before the second. At the time, though, local lockdowns were still in place.

Figure 3: How often did people visit their local high street before, during and after lockdown?
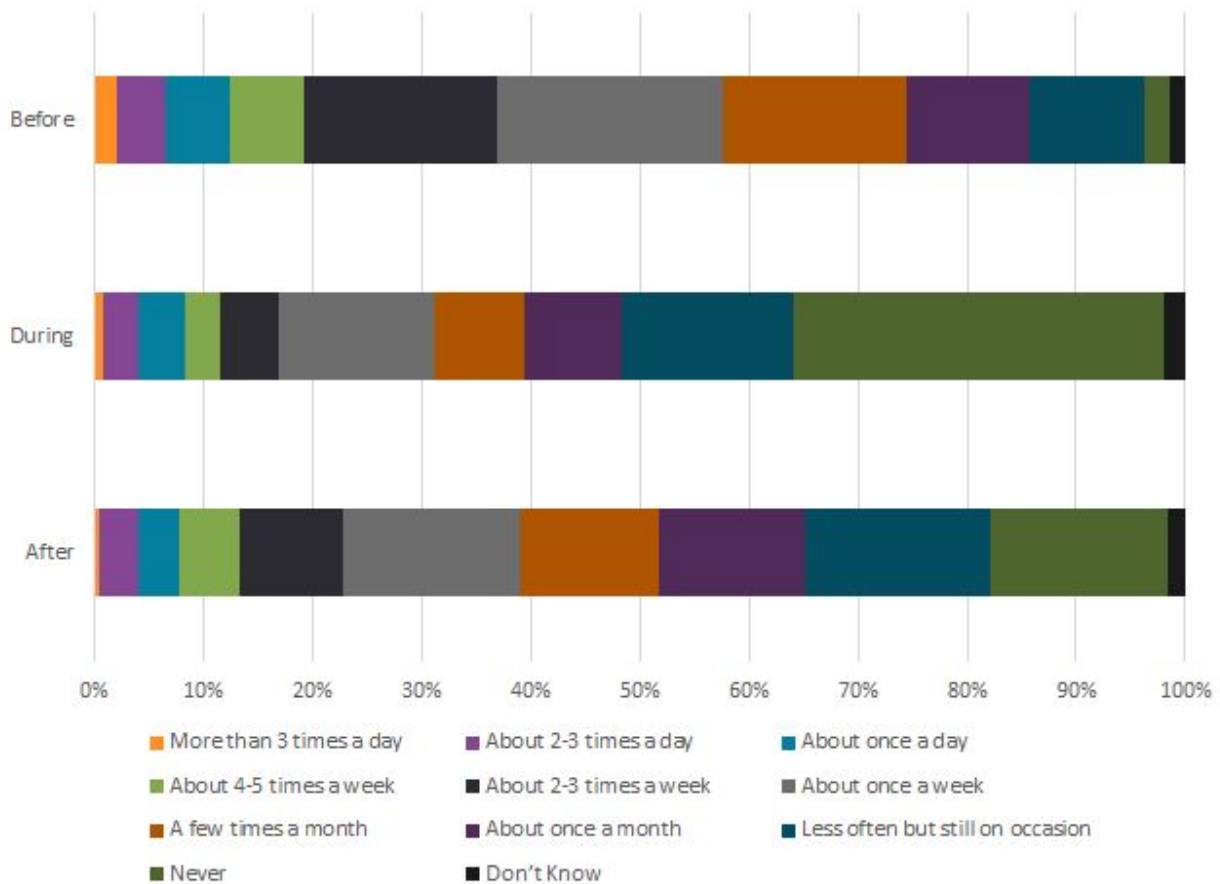
Figure 3: How often would you tend to go into your nearest high street [prior to the outbreak of Coronavirus in the UK (i.e. before March 2020)/during the national lockdown in response to the outbreak of Coronavirus (i.e. March to June 2020)/ since the end of the national lockdown in response to Coronavirus (i.e. Since June)]?

In detail: Many people have been pushed online for the first time, but it's not instead of physical shopping

When we looked specifically at people's shopping habits before Covid-19, during lockdown and after lockdown, we found that 50% of our sample had done most of their non-food shopping in shops before Covid-19 and only 19% shopped mostly online. During lockdown this switched to 29% mostly in shops with 43% shopping mostly online. Since the lifting of the first lockdown (but before the start of the second), only 33% say that they now shop mostly in shops with 34% shopping mostly online (**Figure 4**).

Figure 4: How has lockdown changed where people do the majority of their non-food shopping?
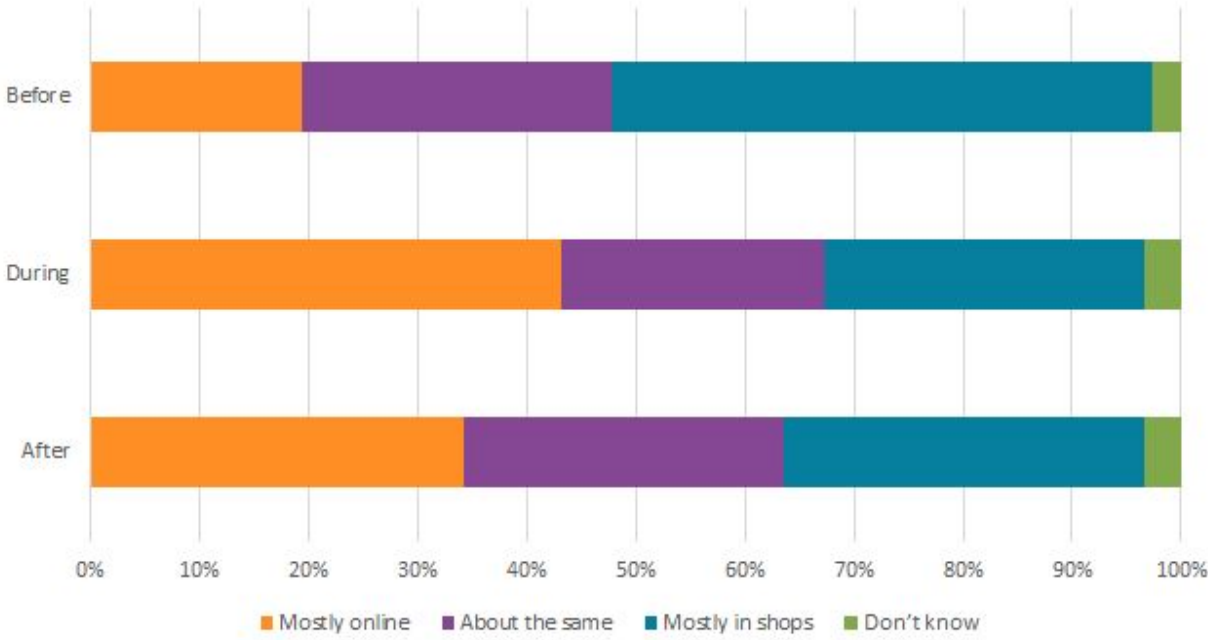
Figure 4: *[Prior to the lockdown in response to Coronavirus (i.e. before March 2020)/ during the national lockdown in response to the outbreak of Coronavirus (i.e. March to June 2020)/ since the national lockdown in response to the outbreak of Coronavirus (i.e. since June 2020)], other than your main food shop from a supermarket or equivalent, did you tend to buy most of your daily purchases online or in shops?*

This, we believe, is largely due to nervousness about going back into physical shops and will be overcome when people feel that it is safe to go shopping again. In our research, particularly in our focus groups, we found no evidence that this was a permanent shift – quite the reverse. We found that online and physical shopping were not comparable, that one does not exclude the other, and that people do them for completely different reasons. It is too simplistic, therefore, to conclude that more online shopping during lockdown means a move away from in-store shopping. The only conclusion that we can safely reach is that physical shops were closed.

Many people have been shopping online for years because it's convenient and quick, and for others, especially now, physical shopping just is not possible. So even though it may not be the normal way they buy things, it is, at the moment, the only way. This needs to be taken into account when analysing our polling figures.

In detail: Shopping online and in-store are not mutually exclusive – it's not one or the other

We found in our groups a marked difference in social background and affluence in attitude to online shopping. Some people in the more affluent groups in St Albans and Birmingham were quite sanguine about the decline of shops. As far as they were concerned, online shopping was only making physical shops more expensive and less convenient and they were not too worried about what would replace the shops in the high street. "Something will."

What was so interesting in this research was that for the more working-class groups in places like Walsall, Derby, Sunderland and the declining towns outside Birmingham, physical shopping/going into town, was primarily about being together with people.

'Shopping' is often a day-long event, a social experience comparable more to visiting family for Sunday lunch or meeting with friends in the pub. The shops are as vital as the roast or the pint. This was why the shops – the kinds of shops and how many were still open – mattered so much. It is, in every sense, a physical experience, meeting friends and family, bumping into people they know, touching, feeling and trying on clothes. It's why 36% of our sample had waited for the shops to open again after lockdown before shopping for clothes rather than doing it online, with a clear age trend from 28% of 18-24s to 44% of 65+s.

> *I suppose I'm a bit more old-fashioned and like going into the shops. I get to try things on, have a coffee and make a day of it. It'd be a real shame if that was taken away as things shut more.*
>
> **Young woman, Derby**

> *There's a little café in town and I've been going there with my mum since I was a little girl. We still go there and walk around the shops. I really miss that side of things. Just walking around and bumping into people. I miss that.*
>
> **Stay-at-home mum, Walsall**

This group really missed going to town and going shopping much more than our groups in St Albans and more affluent parts of Birmingham. Shopping was not the same important social experience as it was for people in Walsall, Sunderland, Derby and the outskirts of Birmingham.

In detail: Shopping confidence needs to be rebuilt post-Covid-19

A problem, even months after the first national lockdown was lifted, was that people's confidence in physical shopping had not returned. Even among the working-class people in declining towns who were missing the social side of shopping so much, we still found nervousness, reluctance and an unwillingness to take the risk of catching or spreading the virus.

> *What worries me is that if I go out with my little boy, he won't know that he can't touch things or go close to people. How do you explain social distancing to a toddler?*
>
> **Young dad, Birmingham**

This opinion research was conducted before the announcement of the second lockdown, but the experience will likely only compound that lack of confidence that people were feeling.

Our polling even before the second lockdown found an outright majority of people (52%) say that they are nervous or very nervous about going into shops compared with 45% who say they are confident. While this was relatively consistent across the sample, there was a notable gender split with male respondents slightly more likely to be confident than nervous (50% confident as opposed to 47% saying they were nervous), and female respondents much more likely to be nervous than confident (57% versus 40%).

> *It's so difficult right now. How do you get people into the shops when they're so nervous?*
>
> **Older software engineer, Walsall**

> *If you look at it from a health perspective only, then sure, it makes sense. But for the future of the country and the economy, it would be a disaster.*
>
> **Man in his fifties, Derby**

> *I might go to the supermarket, but I do all my other shopping online. I'm not going back to the shops until there's a vaccine.*
>
> **Retired engineer, Walsall**

There is a pattern here that we have been picking up over the last few months: a palpable and increasing nervousness about what happens to the wider economy and to people's personal finances amongst those whose situation is more precarious. Some have already lost their jobs while others feel that they will.

> *I just don't know what's going to happen to us. I've lost my job, my wife's furloughed – for now. It's terrible and I'm quite scared about the future, to be honest with you.*
>
> **Unemployed man in his thirties, Walsall**

> *I run a small business in the centre of Derby. We're just about getting back to where we were before lockdown and on our feet again. If we had to shut again, we'll be finished. I don't know what I'd do.*
>
> **Older woman, Derby**

> *It's really difficult. We are living in some very very uncertain times. I see people struggling daily… the fallout is something I worry about. Here we are ten weeks from Christmas, and we can't plan.*
>
> **Teaching assistant, Sunderland**

This is important because Covid-19 continues to undermine people's confidence about going out and their ability to spend money in the way that they used to, as well as feeding more widely into their feelings about the towns where they live. It's not just a massive existential problem for shops, it also adds to people's anxiety about the survival of their towns. Enticing people back to physical shopping again will need a kick-start, an assurance that it is safe and an encouragement to do it.

> *The Government should have a Shop Out to Help Out scheme to encourage people back. There's just no-one in the town centre now.*
>
> **Carer in her thirties, Birmingham**

In detail: Helping towns survive

Getting people back to the shops is an essential part of helping towns come through the other side of the pandemic. It is the same with other measures that receive huge public support such as a cut or holiday in business rates, lowering rents for shops – anything that makes it easier for them to stay open. When asked what measures would best support shops, people overwhelmingly chose a cut in business rates. This speaks directly to the importance of shops as a barometer for a town's wellbeing and the direct impact that has on people's civic pride.

People in all demographics just really want their town centres to survive lockdown. When we asked people in our national poll what could or should be done to help support their high streets, 50% of people said that costs on shops, like tax or rents, should be reduced as the top of their top five priorities – above cutting parking charges. When asked about specific measures that would help their local high street, lowering business rates for shops came out top at 41% (**Figure 5**). When asked directly about business rates and whether they should be cut, 60% agreed.

Figure 5: Which measures people would like to see to help their local high street?
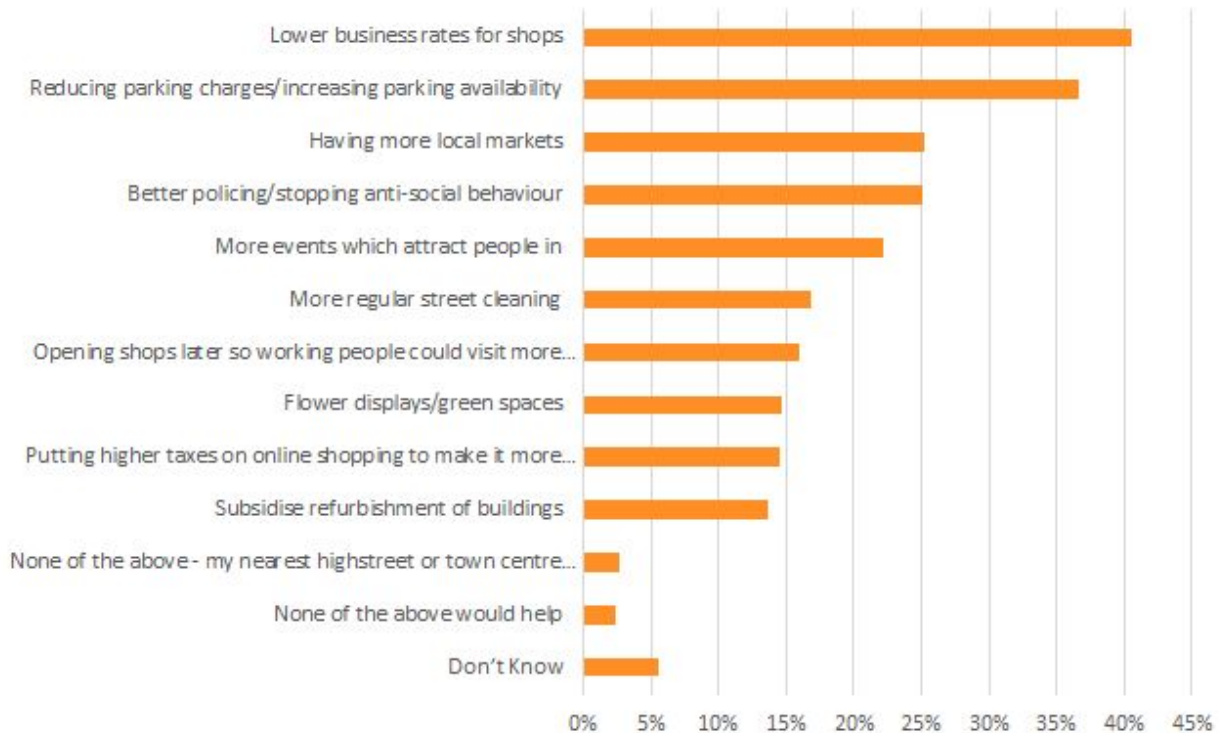
Figure 5: *Thinking specifically about your nearest high street, which of the following measures would you like to see that might help your nearest high street? Please select up to three.*

This was reflected in the focus groups where cutting costs for shops and lowering business rates, rents and parking charges also came out very strongly. People thought that rents were pushing people out of town centre high streets and that rates meant they could not afford to trade there. One man in Walsall said that Marks and Spencer had recently closed down but that they were still having to pay business rates: "What's the incentive to get a new business to open up there for the council? That's the problem."

> *You've got to bring down the business rates. Not just the big shops but the little ones too. They're still paying all the rates and rents and they've got no-one shopping there. How are they supposed to survive? And all the electric to keep you going.*
>
> **Retired engineer, Walsall**

> *It's just unfair on shops. They can't afford to pay the rates and rents, especially the smaller ones, when no-one's going shopping. How can they survive? They've got to cut the business rates.*
>
> **Retired engineer, Birmingham**

> *I don't know too much about business rates and rents but they're definitely too much. What is the point in all these buildings being empty? There are lots of people out there who would like to get in them, but the rents and rates are too high.*
>
> **NHS maintenance worker, Sunderland**

The same was true of parking charges. When the Birmingham groups compared the town centres around Birmingham with Lichfield or Maryhill where parking was free, they thought that it explained why Lichfield and Maryhill were thriving and no-one was going to Birmingham anymore where the parking charges (and a new traffic layout) were stopping people from going in.

> *Maryhill is free parking, it's always busy and it's lovely and clean.*
>
> **Retired engineer, Walsall**

> *It's probably the reason I end up going to the out of town shopping places. It's free to park and there's loads of choice there. Why would I go and pay a fiver to park in Derby centre when I can get what I need for free at the big shopping park?*
>
> **Younger female, Derby**

All of this matters because it feeds into people's strong sense of civic pride – and how to bring it back.

In detail: People want to be part of helping towns thrive again

People want their town centres, their high streets and the shops to survive because without that, there is no hope for them that they can thrive again. This was true for all the people we talked to across geography, age and class. Everyone wanted their town to 'go back to how it was before.'

What was interesting was how positive, engaged and animated people became when we asked them to imagine their perfect town centre or what was needed to revive their own towns. While the younger groups wanted more 'to do', pedestrianised streets, café and bistro pavement life and pop-up art galleries, the older groups were keen on more green spaces and park benches, outside places where they could sit and talk. Everyone, though, wants hanging baskets.

If there are empty shops, why don't they allow young people to use them?

Older software engineer, Walsall

I really want more green spaces, somewhere to walk and sit. Or museums and art galleries. Can't they give empty shops to local artists? I'd go and see that.

Care worker in her fifties, Birmingham

Especially in the ex-industrial towns like Birmingham, people talked with great knowledge about their manufacturing heritage, wanting this to be better show-cased in museums. Although people thought that the new development at Longbridge in Birmingham was a great improvement on what had been there, they still really wanted to have their car-making history remembered.

Policy recommendations

Supporting town centres to survive and revive will require concerted action from national government, local authorities and community groups. People want to use their town centres but they need them to be places they like, places they feel safe and places where it's easy to shop, eat out and have fun.

Policy makers have recognised this pressing need to support towns. In recent years Government has created a number of funds to support towns, high streets and levelling up. The following policy ideas are designed to complement those funding pots and provide suggestions for how they may be targeted more effectively.

Taken together, and with the hope of a Covid-19 vaccine on the horizon, we believe they provide a route to making our town centres places that more people will want to be.

1. Help shops recover and thrive (business rates)

The extension of the Covid-19 restrictions over the festive period will have both a financial impact, limiting footfall during the busiest period of the year, and a psychological impact, further driving people to use online shopping. Government has responded positively to this by encouraging local authorities to allow shops to extend their trading hours.

But to mitigate the impact of this further, Government needs to make getting back into shops as easy and attractive as possible. For the foreseeable future, social distancing will limit the numbers of people who can physically enter shops at any one time. Easing opening hours will help ensure that people can shop at different times but relaxing Sunday Trading laws on an opt-in basis for local authorities for up to 12 months from the ending of the tiered restrictions would also be extremely helpful.

As well as allowing more people flexibility to shop, these measures should help to address shoppers' concerns about overcrowding and to help social distancing on the high street during the pandemic.

However, the period following the end of the Covid-19 restrictions will be even more important for the future of the high street. To save town centres, the Government will have to make a concerted effort to encourage people back to physical shopping. Learning from the success of the 'Eat Out to Help Out' scheme, the Government could also consider introducing a 'Zero VAT' week at Easter following the roll out of the vaccine. This would not only act as a nudge to get people back into town centres, but also help retailers recoup the losses from depressed winter trade.

However, many town centres struggled long before the Covid-19 crisis. This is in no small part due to the uneven playing field created by business rates. Future decisions on rates could either see town centres revitalised or sound their death knell. Lowering business rates for shops was the top choice for our poll for how to support the high street and should be at the heart of any high street recovery package. In order to simplify the system and support smaller shops in declining towns the Government could:

- Reduce the rate at which business rates are charged.
- Remove transitional relief up and down, which acts as a subsidy for business from poorer to wealthier areas.

A rate reduction could lead to thousands of new jobs in retail and ensure that more stores are able to keep their doors open and continue trading.

2. Events and places that celebrate towns

The Covid-19 pandemic has prevented an entire year's worth of community events from taking place. Community events, whether they be Christmas Markets, town fetes, city beaches, or agricultural shows, play a major role in bringing people together in town centres.

Not only will these events not have taken place this year, but they will also have lost valuable momentum, funding and volunteering expertise that are necessary to host them successfully. These events are not only important in themselves for community spirit and tied to local history, they also get people together and encourage people to see their town centre as the heart of the community.

The Government's new Levelling Up Fund should include the ability to support community events that bring people together in towns and celebrate their distinct character. This could include:

- Building on support in the Towns Fund for local markets.
- Funding town centre events and attractions that are linked to the town's past and history such as fetes or country shows. These events should build on the Government's investment in hyper local projects such as the Blackpool Illuminations and have strict requirements that they are linked to the history of a town.
- Encouraging local authorities and academy chains to integrate visits to town centres and teach about the history of their local town as part of the primary school curriculum. Resources could be developed and provided to help them do this.
- Using the 2022 Festival of Britain celebrations as an opportunity to support towns to teach civic history. As part of that work, DCMS could offer grants to local museums that allow them to run educational events in their local area.
- Offering matched funding for local community groups that want to carry out small scale beautification projects such as installing hanging baskets across high streets and markets.

3. Clean, safe town centres

Participants in our research told us that one of the main reasons they do not like going into town centres is a lack of cleanliness. They are also depressed at the neglect and mistreatment of local monuments like cenotaphs. While clean-up projects may not be as glamorous as other 'levelling up' initiatives, they are a popular and effective investment. Levelling Up funding could be supplemented by:

- Relaunching National High Street Perfect Day, and renewing the £10 million fund to support local authorities, community groups and volunteers to clean up their local high street and tackle littering.
- Raising the fixed penalty charge for littering to £120 and encouraging local authorities to use the increased revenue to hire more local authority enforcement officers to further deter littering.
- Investing in street furniture, lighting and public toilet facilities in town centres so that people want and feel able to make shopping trips a whole day event.

Worries about crime and anti-social behaviour puts many shoppers off using town centres, and retail crime costs the sector almost £2 billion a year. Alongside tackling uncleanliness, the Government should give people confidence that it is safe to use town centres, that means tackling crime and anti-social behaviour by:

- Providing targeted funding for increased police presence at weekends and other major shopping days.
- Funding rapid response units in town centres to deal with vandalism and graffiti immediately so that it does not become an eyesore.
- CCTV vouchers for retailers, allowing them to reduce the costs of protecting their business and customers from crime.

4. Getting into towns

If people are going to go to shop on the high street, they need to be able to get into town centres. Lack of car parking spaces, excessive parking charges, alongside infrequent and unreliable bus services are making that difficult and will ultimately kill town centres. The Government should tie their levelling up agenda and green agenda together by supporting green transport options around their town centres. Ways to do this include:

- Building on the manifesto commitment to 'keep bus fares low, bring back and protect rural routes and speed up your journeys' by investing more funding in bus services.
- Ensuring that the forthcoming National Bus strategy does not focus just on better services in rural areas, but in their towns and outskirts. This should include an expansion of park-and-ride services and investing in the next generation of clean buses.
- Rather than seeing parking charges as a revenue raiser, using them to encourage environmentally friendly behaviour and improving town centre accessibility. Many local authorities already offer free or reduced parking charges for electric vehicles, others should follow their lead.
- Local authorities should also ensure that high-speed charging stations are available alongside parking spaces.

5. Local ownership

Previous research on town centre regeneration shows that it works best when there are strong local partnerships and local ownership. Our research here confirms that people want to have a say in the future of their towns. Conversely, there are many examples of where town centre regeneration has faltered because local people felt it did not 'fit' with the area.

The current Towns Fund already requires some form of local consultation and the Levelling Up Fund, announced in the 2020 CSR will require bids to show a clear demonstration of local support – for instance from the constituency MP. However, more needs to be done to ensure that regeneration and development of the high street involves the whole community and residents in particular. To do that the Government could:

- Introduce further community engagement requirements for any bids to the Levelling Up Fund, Town Funds or further grants suggested here. That should include demonstrating that the council has taken active steps to involve both residents and retailers in regeneration plans, beyond simply open consultation, for instance by requiring petitions backed by a certain number of local residents.