Town and City Centre Futures in Scotland: Stirling City Centre

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Institute for Retail Studies,
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Structure

1. Crisis, What Crisis?
2. High Streets and Town Centres
3. Stirling City Centre
4. Futures and Conclusions

Crisis on the High Street

Crisis = Reports
Crisis: Straws in the Wind

- Retail Vacancies at Record High
- Shortage of Accommodation, yet Vacant Spaces
- Lack of Creativity or Lack of Opportunity?
- The Relative Costs of "Doing Business"

High Streets and Town Centres

Empty shop rate in Scotland remains above UK average

Consumer Change

- Time and Money
- Demographics
- Access and Travel
- Product and Service Demands
- Product and Process Innovation

Retail Responses

- New locations and formats
- Role of convenience
- On-line retailing
- New “shopping” models
- Questions of space and place
New Locations and Formats

The Convenience Boom

But What is Convenience Today?

The First 15 years of the Internet

<table>
<thead>
<tr>
<th>Year</th>
<th>Launch</th>
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</thead>
<tbody>
<tr>
<td>1990</td>
<td>WWW Invented</td>
</tr>
<tr>
<td>1995</td>
<td>Amazon.com; eBay</td>
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<tr>
<td>1996</td>
<td>Dell.com</td>
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<tr>
<td>1997</td>
<td>First m-commerce (SMS)</td>
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<tr>
<td>1998</td>
<td>Google; PayPal</td>
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<tr>
<td>2000</td>
<td>Tesco.com; Asos</td>
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<tr>
<td>2001</td>
<td>Wikipedia; Blogs</td>
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<tr>
<td>2003</td>
<td>MySpace</td>
</tr>
<tr>
<td>2004</td>
<td>The Facebook</td>
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<tr>
<td>2005</td>
<td>YouTube</td>
</tr>
<tr>
<td>2006</td>
<td>Twitter</td>
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</tbody>
</table>
One Impact

The Online Distribution Issue

- "Dark stores"
  - Urban conurbations
- Click and Collect
  - Large stores
  - Urban collection/delivery
  - Argos and Ebay

The Blended Retail Revolution?

- Has changed:
  - How we shop
  - How we think about shopping
  - How we tell others about shopping and retailing
  - How retailers sell
  - Retail operations and practices

Pulling it Together? Retail Week

- 40% turnover online by 2020
- Online sales up 17% in first half 2013
- 67% of JLP customers use more than one channel
- Delivery service with Collect+ to be launched
- 5,000 convenience stores in under-represented countries such as Scotland, Northern Ireland and Wales
Recessionary Shaping ...

- The Banking Crisis
- The Economic Downturn and Various Measures
- Unemployment and Loss of Disposable Income
- Zombie Companies and Property

... Provides Some Opportunities

Too Many Shops/Too Much (Wrong) Space

- Structural Change
  - Consumer behaviour
  - Business reactions
- Recessionary Overlay
  - Consumer concerns
  - The new realities in property and banking
- Spatial Change
  - We need less space
  - We need better fit space

Let's Pause ...

- Long run change in what we think retail is about (agents of social cohesion and change or agents of social harm?)
- Long and medium run change in retail operations and practices (how many shops do we need? where?)
- New channels and issues about blending (collection and returns for example)
Town Centres and High Streets

- Crisis of Retail Space
- Crisis of Town Centres as well as High Streets
- Big City Centres doing better/more resilient
- Smaller towns in real difficulty

Decentralisation: Not just retailing

- We’ve encouraged fragmentation, decentralisation, neglect and decline
- Schools, Hospitals, Living Space, Cinemas, Football Grounds, Offices, Hotels, Colleges and Universities, not only Shops, have been “moved out”
- In smaller towns withdrawal of many operators and services

Town Centres

- Decline in importance
- Concentration of area (prime zone)
- Costs have risen faster
- Rates are a big issue
- Vacancies and dereliction – not just ex-shops and not just street level

The Issue?

“Town centres, as we currently see them, and as most people nostalgically romanticise them, are in the main anachronistic irrelevancies unsuited to the changed consumer, business, social and economic world. We do no one any favours by clinging to an outdated vision of a past that arguably never existed, and certainly does not match our modern twenty-first century society.”
**Why do Places Matter?**

- Defining Feature
- Vital Resource
- Social and Economic Benefits
- Improve Quality of Life
- Heart of Government Priorities

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**Strategic Objectives of the Scottish Government**

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Retail or Town Centre Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wealthier and Faire</td>
<td>Vitality of places and wide social access to retail spaces</td>
</tr>
<tr>
<td>Healthier</td>
<td>Retailers as agency of change</td>
</tr>
<tr>
<td>Safer and Stronger</td>
<td>The need to develop communities and places</td>
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<tr>
<td>Smarter</td>
<td>The role of retailing in providing education and careers; broadbroadband etc availability and opportunities</td>
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<tr>
<td>Greener</td>
<td>Reducing the social and public impact of retail activities</td>
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**The Fraser Review**

- Patrick Geddes: Folk, Work, Place
  - Town Centres First
  - Town Centre Living
  - Vibrant Local Economies
  - Enterprise Communities
  - Accessible Public Services
  - Digital Towns
  - Pro-Active Planning

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**The Three Reviews**

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Portas</th>
<th>Grimsey</th>
<th>Fraser</th>
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</thead>
<tbody>
<tr>
<td>Management of Towns/Places</td>
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<tr>
<td>Rent and Rates/Development</td>
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<tr>
<td>Uses/Use Classes</td>
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<tr>
<td>TCF</td>
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<tr>
<td>Large Retail Support</td>
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<tr>
<td>Vacant Property Issues</td>
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<tr>
<td>Retail/engagement</td>
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<tr>
<td>Information/Evidence</td>
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<tr>
<td>Community Hub</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Digital Innovation</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Investment Hub</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Minister/Government</td>
<td></td>
<td></td>
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<tr>
<td>New Economy</td>
<td></td>
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Town Centre Futures?

• New versus Old Space?
• What do we want from a Town Centre?
• Reasons to go to Town Centre
• Public vs Private Space
• Management? – Business Improvement Districts?
• Entrepreneurial Activity and Diversity

Broad Requirements

• Policies aligned
• Barriers and obstacles removed
• Concerted, co-ordinated action to support towns
• Funding streams need repositioning (national and local)
• Rethinking the BALANCE of taxation and charging especially rates

Stirling: Scotland’s Heart
Stirling: Scotland’s ...  

Stirling: Scotland’s ... Buddleia Capital

Stirling Retail

• Castle and Broad Street
• Movement Downhill and Decentralisation
  – Thistle Centre 1970s
  – Fine Fare & MFI St. Ninians 1970s
  – Springkerse 1980s
  – Thistles Phase 2 late 1990s
  – Individual
    • Aldi, Sainsbury, Morrisons, Waitrose, Dobbies, Klondyke, Greggs, Post Office

The Retail Issue Today

• Thistles
• Decentralisation
• Secondary Streets
• Vacancy Rates
• Operational Issues
But Not Just Retailing

- Offices – Prudential, Ogilvie
- Tourism – Castle, Bannockburn
- Sport – Annfield to Forthbank
- Light Industrial
- Schools (and Colleges and Universities)
- Cinema
- Hotels
- Accommodation
- Services e.g. Post Office, Dental Practices

Stirling’s “Problems”?

- Reasons to Visit?
- Folk, Work, Place?
- Stirling = ??
- Vacant Space
- Private vs Public
- Areas and Connectivity
- Costs (but any different?)
- Lack of opportunities?

Stirling Actions?

- City Centre Management
- Opening-up
  - Startup Street
  - Made in Stirling
  - Creative Stirling
  - Markets and Festivals
- Valuable, but is this “Patching” and is it sustainable?

More Questions than Answers

<table>
<thead>
<tr>
<th>Fraser Review</th>
<th>Stirling City</th>
</tr>
</thead>
<tbody>
<tr>
<td>TownCentre First</td>
<td>An end to decentralisation?</td>
</tr>
<tr>
<td>TownCentre Living</td>
<td>Vacant spaces above the shops?</td>
</tr>
<tr>
<td>Vibrant Local Economies</td>
<td>Spaces for local business/organisations?</td>
</tr>
<tr>
<td>Enterprising Communities</td>
<td>Unlocking local talent?</td>
</tr>
<tr>
<td>Accessible/Public Services</td>
<td>Front of the Thistles… where else?</td>
</tr>
<tr>
<td>Digital Towns</td>
<td>Up to speed?</td>
</tr>
<tr>
<td>Pro-Active/Planning</td>
<td>How to gain control of sites for development?</td>
</tr>
</tbody>
</table>
Futures and Conclusions

- Can’t be Nostalgic; have to use Heritage
- Operational issues need addressing: costs, access, parking, movement
- Structural change requires structural response
- Community and Council response vs National levers

Contact Points

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