

The Structural Transformation of England's Towns

PLACE-BASED EVALUATION & THE BEYOND-HIGH-STREET PERSPECTIVE

Prepared for Stakeholders, Local Authorities, and Urban Policy Analysts (1995–2025)

DATA INNOVATION: UNDERSTANDING ENGLISH PLACES (LAUNCHING 16TH SEPTEMBER)

On **16th September**, stakeholders across planning, economic development, and civic leadership will gain access to **Understanding English Places (UEP)**. Designed by Matthew Hopkinson (Didobi Ltd) in partnership with Edge Analytics, UEP provides comprehensive, data-driven insights into the demographic, economic, and functional profiles of England's urban settlements, enabling local authorities and policy-makers to evaluate, baseline, and monitor the health of towns over time.

1. Beyond the High Street: A Holistic Town Perspective

While "the high street" remains a widely used popular term in media and public discourse, focusing exclusively on retail thoroughfares addresses only a symptom rather than the underlying cause of settlement decline. High streets do not exist in isolation; they are direct physical manifestations of the overall economic vitality, housing density, transport connectivity, and civic function of their wider town.

"A failing high street is fundamentally the symptom of a failing town. Reversal cannot occur through retail intervention alone, but requires holistic regeneration across the broader settlement footprint."

— MATTHEW HOPKINSON, CO-FOUNDER OF DIDOBI & CO-CREATOR OF UNDERSTANDING ENGLISH PLACES

When a town loses major employer bases, structural population growth, or transport links, footfall and commercial investment evaporate from its central core. Thus, monitoring town health requires evaluating whole-place ecosystems—a central objective of the new *Understanding English Places* framework.

2. Major Structural Drivers of Decline (1995–2025)

Out-of-Town Retail Parks & Edge developments

Over the past thirty years, massive commercial investment migrated from tight urban centers to edge-of-town and out-of-town retail developments. Benefiting from cheaper land, large modern floorplates, and extensive free parking, these parks captured high-margin automobile shopping traffic, siphoning off high street anchors and destabilizing historical commercial balances.

Supermarket Expansion & Non-Food Diversification

The aggressive expansion of major supermarket chains into non-food retail sales—including clothing, homewares, stationery, and electronics—decimated specialty retailers on the high street. By offering seamless "one-stop" destination shopping backed by massive purchasing power, big-four grocers captured trade previously distributed across scores of independent town centre businesses.

~30%+

ONLINE RETAIL SHARE OF UK
COMMERCE

15,000+

CHAIN STORE CLOSURES (EXCL.
INDEPENDENTS)

14%+

AVG TOWN CENTER VACANCY RATE

Data Sources: **Online Share:** Office for National Statistics (ONS) Retail Sales Index (RSI). | **Chain Closures:** Centre for Retail Research (CRR) & Local Data Company (LDC) / PwC Store Closures Tracking (specifically covers multiple-outlet chains with 5+ stores, excluding independent retailers). | **Vacancy Rates:** Local Data Company (LDC) GB Vacancy Benchmark / British Retail Consortium (BRC).

The Rapid Rise of Online Commerce

The UK's exceptionally fast consumer adoption of e-commerce accelerated structural decline. Digital platforms provided friction-free price discovery and home delivery, fundamentally undercutting physical store networks and precipitating the downfall of legacy flagship chains (e.g., Woolworths, Debenhams, and Arcadia Group).

3. Spatial Planning & Missed In-Town Housing Regeneration

A critical failure in spatial development over the last thirty years has been the decoupling of residential construction from town centre cores:

- **Suburban Greenfield Sprawl:** New housing was heavily built on out-of-town greenfield sites linked to bypass roads and retail parks, isolating new residents from legacy commercial hubs.
- **Lack of In-Town Regeneration:** Rigid planning frameworks, commercial property tax structures (Business Rates), and conversion costs discouraged developer investment in converting redundant central commercial buildings into high-density urban residential homes.

Strategic Takeaway for Stakeholders

The launch of *Understanding English Places* on 16th September comes at a pivotal moment. Equipping local leaders with comparative, settlement-wide data allows stakeholders to design interventions that treat towns as integrated organisms—realigning housing, transportation, civic infrastructure, and commercial uses to build resilient local economies for the future.

