

THE CHELTENHAM PROPERTY FORUM

EVANS JONES

Surveyors & Planning Consultants

THE FUTURE OF THE HIGH STREET

A seminar for property professionals in Cheltenham.



Agenda



- **John Lewis & Partners** – Jamie Wilkinson, Senior Manager
- **Cheltenham Borough Council** - Jeremy Williamson (MD, Cheltenham Development Task Force); Tracey Crews (Director of Planning).
- **Cheltenham BID** - Belinda Hunt, Operations Manager
- **Evans Jones** - David Jones, Managing Director/Head of Planning
- **Roberts Limbrick** – Joe Roberts, Director



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Cheltenham Borough Council – collaboration, engagement, policy making & promotion

- ❑ **Jeremy Williamson – Managing
Director, Cheltenham Development
Taskforce**
- ❑ **Tracey Crews – Director of Planning**



Place – Key challenges for Cheltenham

- Under-performing economy (as measured by jobs growth and productivity rates)
- Under-performing visitor economy (as measured by number of staying visitors)
- Ageing population – an increase in the number of older people (in particular those over 85) and much slower growth of children and young people and working age-people.
- Cheltenham is the district in Gloucestershire that displays the most extremes in deprivation



According to the headlines.....

The death of the high street/town centre is imminent. Since Woolworths in 2009 the UK retail scene has been changing

- 18% of transactions now on-line - *CBRE*
- Record decline in footfall as High Street woes continue *British retail consortium*
- Costa coffee sees UK sales fall by 2% as high street woes continue *Business Matters Magazine*
- Sir John Timpson to lead retail experts in battle against high street challenges *Retail Gazette*





WHISTLES We have had our share of losses ...

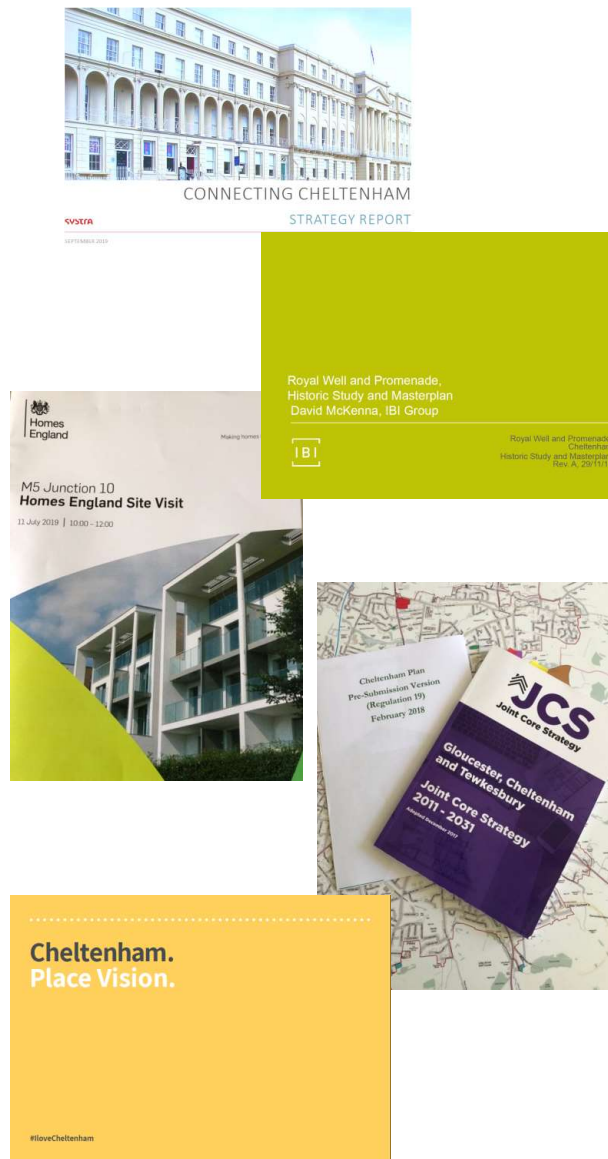




WINCHCOMBE STREET

Rodney Road to Pittville Street

Awaiting Boots Corner trial outcome



Policy & Strategy

- Development Plan
 - JCS2!
 - Retail review
- Transport
 - Connecting Cheltenham
 - Local Transport Plan
 - Rail Investment Strategy
 - Growth Deal 3 delivery
 - M5 junction 10 HIF bid
- Place making
 - Place Vision
 - Cheltenham Transport Plan
 - High Street (phases 2-4)
 - Royal Well/Promenade Masterplan
 - Town centre vision
 - Minster alleyways
 - Town Centre Enforcement

Cheltenham BID Town Centre and Tourism Research 2016

*Where do Cheltenham
visitors come from?*

The vast majority of visitors to the Cheltenham festivals and town hall come from an area approximately bounded by Birmingham, Bristol and London.



CHELTENHAM BID
CARD research group
The Good

*"Superb
racecourse near a
very nice city."*

*"It's best to visit
during a festival for
atmosphere."*

*"It's a Spa town with lots
of lovely architecture."*

*"Middle class town
with decent
hotels."*

*"Classic yet
contemporary."*



CHELTENHAM BID
CARD research group
The Bad

*"It's good to visit but
for one day only."*

*"There are too many
better alternatives I'm
afraid."*

*"Pleasant enough with
plenty of history but all in
all nothing special."*

*"Posh but there's
nothing there."*

*"It's my hometown. If I
lived elsewhere, would I
come to shop? Probably
not."*



Conclusion of Research

No-one outside of Cheltenham cares about Cheltenham.....

What visitors are telling us:

- 'Nice but a bit boring' / 'a bit staid'
- For older people
- Expensive / upper class
- Horse racing / Festivals
- 'Also ran' – Bath / Oxford etc. have much stronger 'attraction'
- Not much for young people
- Limited 'attractions'

Survey findings

- More financially stretched / younger shoppers
- Less affluent shoppers
- Montpellier / Suffolks / Bath Road / Brewery less known
- Only 20% shoppers came by car

What our stakeholders are telling us.....

- Greater ambition required – build on what is good, be edgy and creative
- Build on strong heritage - Spa, Regency, Industrial, Cyber, retail
- Strong leadership and willingness to take risks
- Digital / Cyber growth potential
- Cultural offer could be stronger
- All round vibrancy needed
- Strengthen relationship with Gloucester
- Vision must be inclusive and community focused
- Child-friendly town & talent pathway for young people
- Focal point needed in Cheltenham



The diagram illustrates a central 'place' (green circle) surrounded by four neighboring regions (grey circles): Birmingham, Cotswolds, Gloucester, and Cheltenham. Green arrows point from the central place to each of these regions. Additionally, a green arrow points from the central place towards the bottom, leading to the label 'Bristol', and another green arrow points from the central place towards the bottom-right, leading to the label 'London'.

Inside the central 'place' are four overlapping dashed purple circles containing the following text:

- business investment jobs
- community skills knowledge
- culture attractions visitors
- E.D. marketing tourism



Belinda Hunt

Operations Manager

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CHELTENHAM
BID Local businesses
improving
our town 

What is a BID?

Business Improvement District

How are BIDs funded?

By the businesses in the BID zone.

Who decides to have a BID?

The businesses have the final say.

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Cheltenham BID

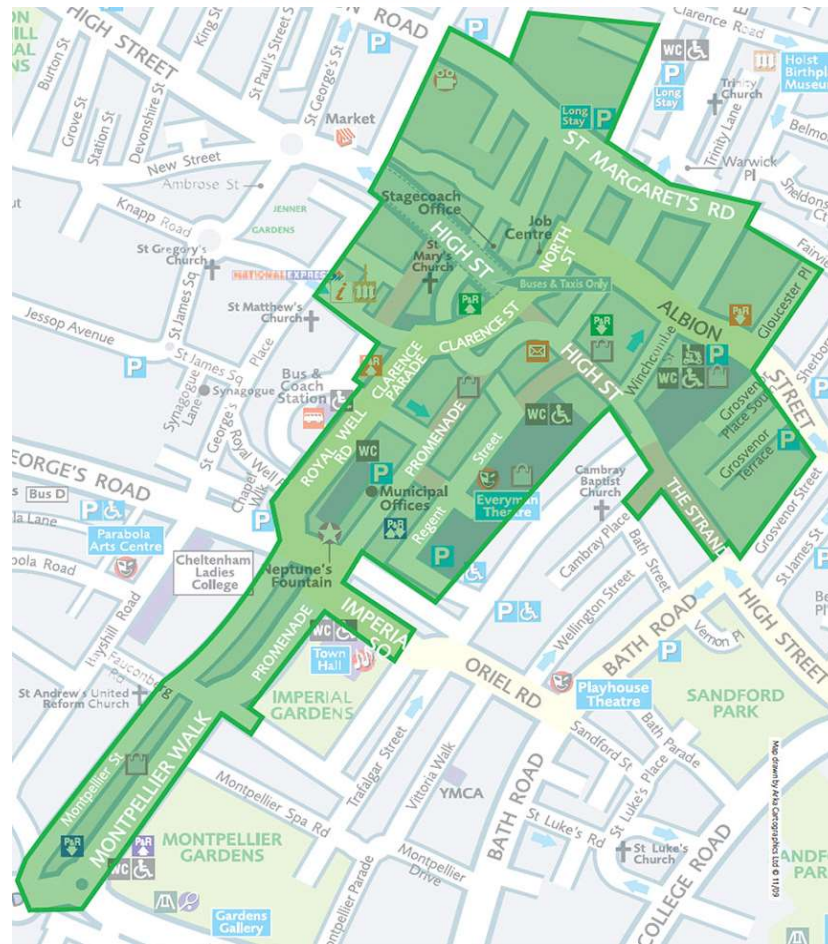
A Yes vote in the BID ballot



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The BID zone



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Our vision

“We aim to make Cheltenham a vibrant and prosperous town where businesses flourish and visitor numbers increase.

Whether you live or work in Cheltenham or are simply visiting, we want to ensure you enjoy our town centre, appreciate how much it has to offer and look forward to returning”

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Town Centre Events – that wow factor



A magical Christmas



Light Up Cheltenham

#OurChelt

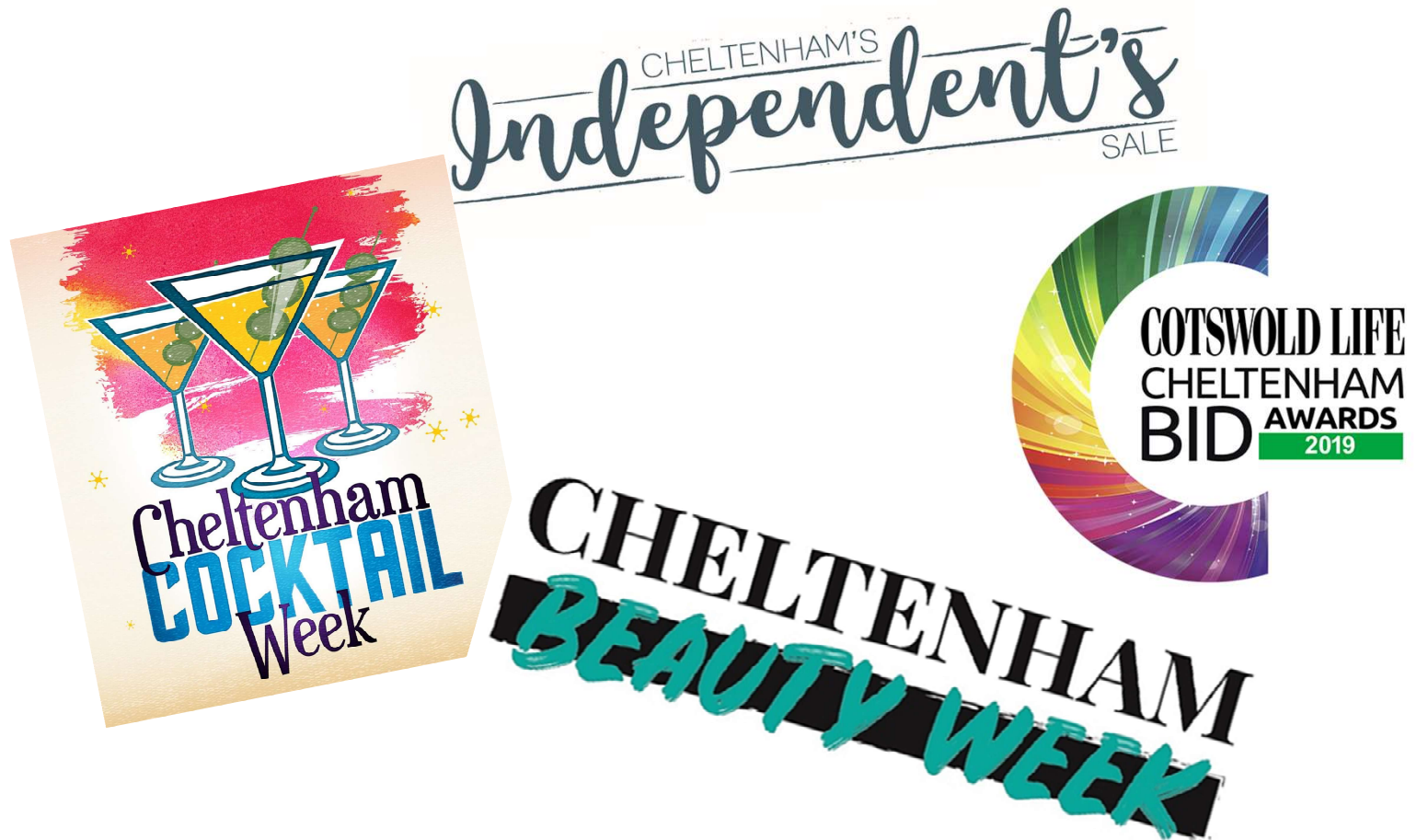
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#LightUpCheltenham

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Town Centre Events – creating our own



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our town

Town Centre Events - supporting and encouraging



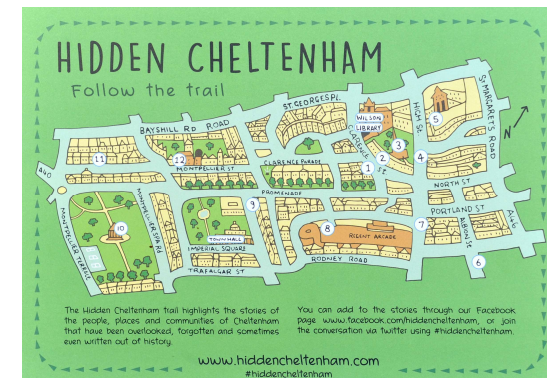
#TheFestivalTown

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our town

Town Centre Events - supporting and encouraging



MIDSUMMER FIESTA



#TheFestivalTown

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Marketing and Promotion



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Marketing and Promotion – Keep it Local



#Spend in Cheltenham

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Marketing and Promotion



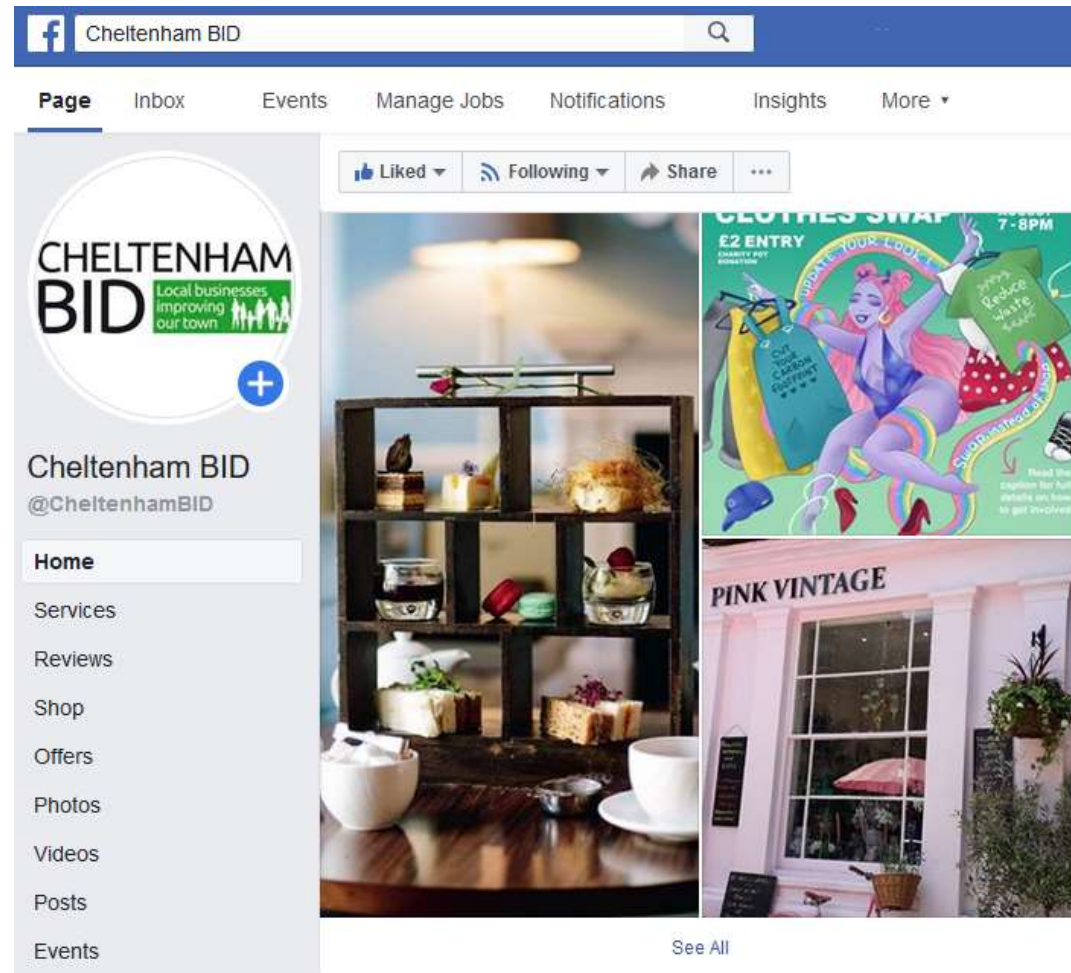
1,509



2,347



1,047



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Marketing and Promotion



1,066



1,059



1,874

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Home

Posts

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About

Community

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Upcoming Events

Sep 19 Pop Up Cinema : Skate Kitchen
Tomorrow 7 PM - The Wilson, Cheltenham's art gallery a...
Maria and Sophie like this place [Boost Event](#)

Sep 21 Live Music with Sophie And Gordy!
Sat 8 PM - Memsahib Gin & Tea Bar - Cheltenham, Glou...
Maria and Jenny like this place [Boost Event](#)

Sep 23 Self Defence Seminar
Mon 10 AM - Cheltenham Martial Arts - Cheltenham, Glo...
You like Cheltenham Martial Arts [Boost Event](#)

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Business Support



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Business Support



Because a picture is worth a thousand words! web: www.thousandwordmedia.com email: info@thousandwordmedia.com tel: 07717 871565 or 07775 556610

JOB FAIR
at **The Library**

FOR THE LATEST JOB VACANCIES IN CHELTENHAM

**WED 4TH SEPT
11AM - 2PM**

Cheltenham Library, Clarence St,
Cheltenham, GL50 3JT - 01242 532686

Cheltenham BID
Gloucestershire COUNTY COUNCIL

Dimensions
Training Solutions

- Meet local employers with vacancies
- Employability support and help to work
- All welcome, community venue

CONTACT US
Robert Watkins 07919 555154
robert.watkins@dimensionstrainingsolutions.co.uk

FREE ENTRY

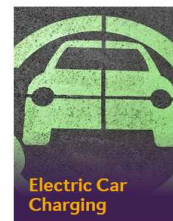
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Parking and accessibility



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Public Realm improvements



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Public Realm improvements



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Public Realm improvements



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Where is the town centre heading?

- How to fill retail space
- Growth in beauty, food and drink, entertainment
- Need for more office space
- Increase in residential
- Boutique and luxury hotels

#TheFestivalTown

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Thank you, please feel free to get in touch with the BID office team if you would like more information.

Kevan Blackadder – Director
Belinda Hunt - Operations Manager
Maria Allebone – Administrator
T: 01242 571123
E: info@cheltenhambid.co.uk

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Welcome

David Jones
Managing Director/Head of Planning



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Planning For the Future



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Why should we worry?



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- £1 in every £5 spent on *line*
- Footfall down 4.2% Nov '17 to Nov '18 (3m fewer shoppers)
- 1,300 store closures in same period
- Over 7 million sqft empty retail space
- Ongoing cycle of store closures and new store openings
- Pressure on retail rent, CVA's
- 75% of respondents saddened by decline of UK High streets
- 25% indifferent to decline



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What is the future?



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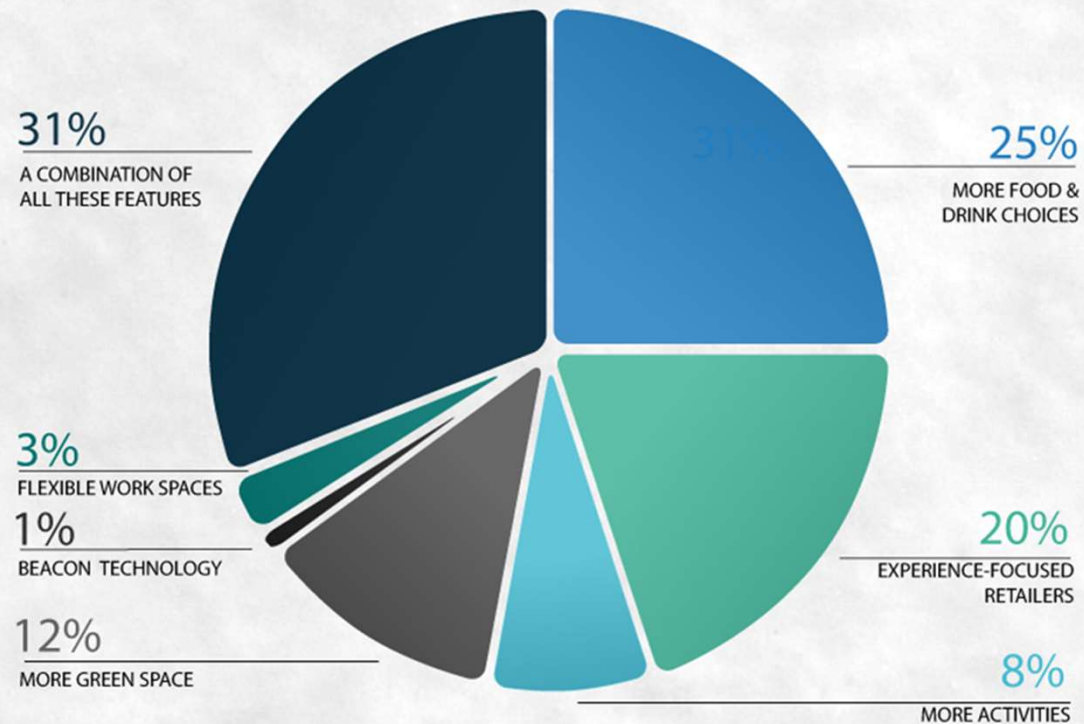
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WHAT WOULD MAKE YOU VISIT YOUR LOCAL HIGH STREET MORE FREQUENTLY?



Survey conducted by ABC Finance 2018 **abc**



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How well is Cheltenham performing?



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John Lewis Cheltenham

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Cheltenham Festivals



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Economic Development



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- CBC Purchase 45 Hectare site Cyber Central
- Education Investment .
- George Hotel - Lucky Onion Group,
- Boutique Cinema (former BHS Regent arcade).
- Honeybourne Place –Formal Investments 63K sqft
- Formal House
- Hub 8



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Town Centre Living



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Planning Response



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- Town Centre First
- Protection of prime retail frontage
- Limiting non retail uses at Ground Floor level
- Permitted use change relaxation
 - Change from A1 retail to A2 Professional services,
 - A3 cafes to B1 Business
 - A1/A2 to mixed uses of A1/2 plus 2 flats over.
 - A2 to A1,A3,B1
 - A3 to A1 or A2
 - A4 (drinking establishments) to A3 Cafes).
 - A5 (takeaway) to A1,A2, or A3
 - A1/A2 to C3 (residential) –subject to PN



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What more could be done?

- Landlords
- Retailers
- LPA's
- National Government/Planning/Legal control
- Local Enterprise Partnership
- Cheltenham BID



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High Street Presentation

Joe Roberts



BIG's powerplant with ski slope and parkland, Copenhagen.

- For us Architecture is the art and science of making sure our cities and buildings fit with the way we want to live
- We also believe at our core we have to be optimists. Architecture is a cruel mistress!
- So this topic is of great interest to us and we want to share our observations and recent experiences.

INTRODUCTION



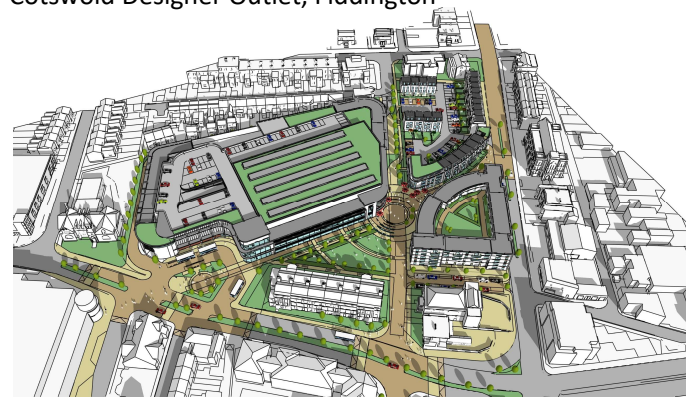
Phase 2, Brewery Cheltenham



Cotswold Designer Outlet, Fiddington



Liverpool One, Final Phase



Urban Masterplanning

ABOUT US



- Demise of many stalwarts of our generation Jessops, HMV, Woolworths, BHS.. left our towns and cities feeling like ghost towns.
- Headlines regularly tell us that the centres of our towns and cities are dying.
- Empty buildings are turning our towns into something from the Zombie Apocalypse.

THE DEATH OF THE HIGH STREET



- Complex not just the explosion of online retail..bricks to clicks.
- Difficult and unpredictable political/economic climate.
- Huge competitive pressures in the marketplace..race to the bottom.
- Social Change...empowered consumers who are more demanding and less tolerant than ever.

CHANGING TIMES



- Retail sector is hitting back slowly with innovation.
- Some are moving out of physical retail others are moving in (Amazon, Ebay).
- We are seeing other uses start to emerge (or re-emerge) on the Highstreet as retail spatial requirements change and space becomes available.

CAUSE FOR OPTIMISM



- What we see is that the Highstreet is not dying, merely continuing to evolve as it always has.
- As the digital world grows the Highstreet becomes a place to meet, connect, socialise..Its architecture will reflect this
- As is generally the case with evolution the future will belong to the fittest, those able to adapt to the changing needs of our society.

CAUSE FOR OPTIMISM



EMERGING RETAIL TRENDS

Speed and Convenience.

Click and Collect, Automated Commodity replenishment, Drone Deliveries



Amazon's Smart Doorbell
Allows them to deliver to our homes
even when we are out



Zalando partnered
with Parcify to trial geolocation-based
deliveries.



DeliverAir uses drones and GPS
location to deliver right into the
recipient's hands.

EMERGING RETAIL TRENDS

Automation

Staff Free, Queue Free Experience, Want it now culture



Amazon Go is a convenience/grocery store where customers shop and buy without conventional payment or cashier check out



Wheelys Moby Mart an autonomous, staffless, mobile, always open, grocery store that has been beta tested in Shanghai.



Sainsbury's concept stores allow customers to scan and pay for their groceries on their smartphone and then walk out of the store without visiting a till.

EMERGING RETAIL TRENDS

Personalised Retail

Improved shopping experience, personalised offers/discounts, mood recognition



Noahface Café
recognises regulars and stores
their previous orders to help staff
personalise the customer experience.



Nutella
have video billboards with facial
recognition claiming that they can
tailor comms to the mood of people
interacting with it

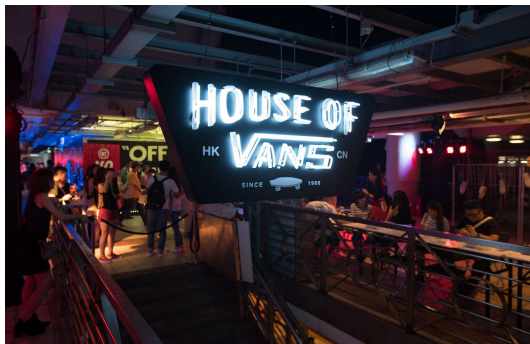


Dynamic Pricing where a seller changes
its price dynamically to match the
market and capture
more customer demand.

EMERGING RETAIL TRENDS

Stores as Experience Centres

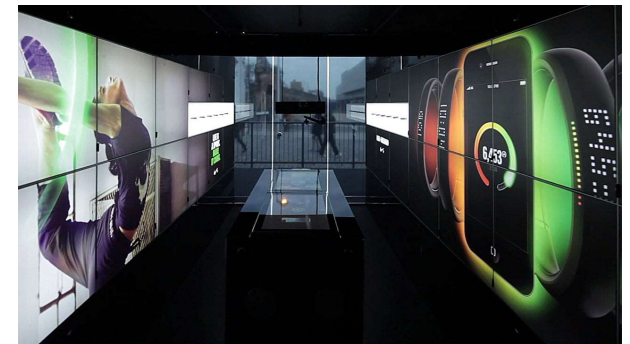
More than just sales, brand awareness, customer relationships deeper experience..highstreet becomes a social hub again



House of Vans London, art/music/fashion converge, with a cinema, café, live music venue, art gallery and skatepark.



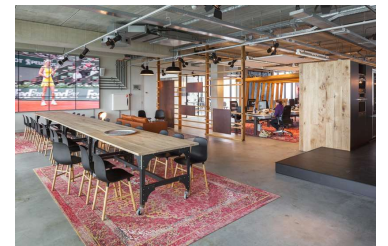
Ikea held an instore sleepover experience following a Facebook challenge, with a 100 fans spending the night in the Essex store.



Increase of 'Brand playgrounds' like Nike's FuelStation at Boxpark in East London with its treadmills, motion-sensor digital walls and interactive mirrors.

EMERGING RETAIL TRENDS

- Increase in affordable town centre living as people return to live here not just young professionals, but larger homes for families..townhouses make a comeback!
- Focus on placemaking to create unique identities for town centres focusing on local strengths, history and culture.
- Workplace..inner city business parks see educational establishments and large businesses return to the centre bringing new energy.
- Food Service and Entertainment with options to expand and diversify as towns become more vibrant, dynamic, inclusive, safe, meeting and interaction places.



NOT JUST ABOUT RETAIL



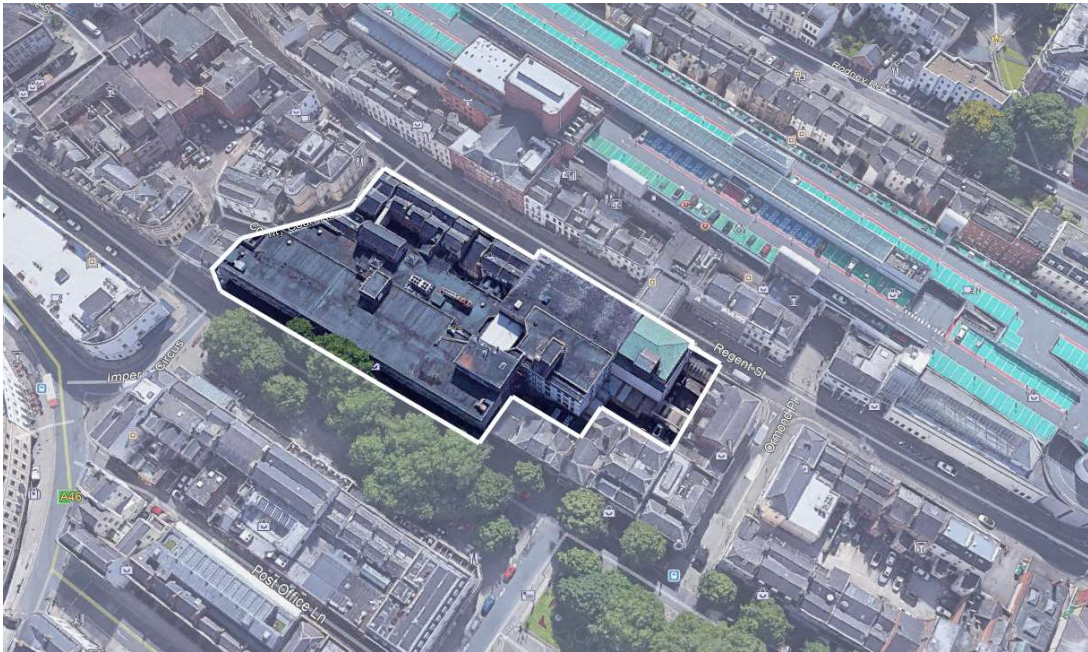
- Cheltenham faces its own challenges, but is in better shape than some.
- Employers have already started to migrate to the town centre, SLG @ the Brewery as a recent example.
- It has always had large residential properties in the centre giving greater diversity and vibrancy than some.
- It has a thriving calendar of festivals and events.

WHAT ABOUT CHELTENHAM?



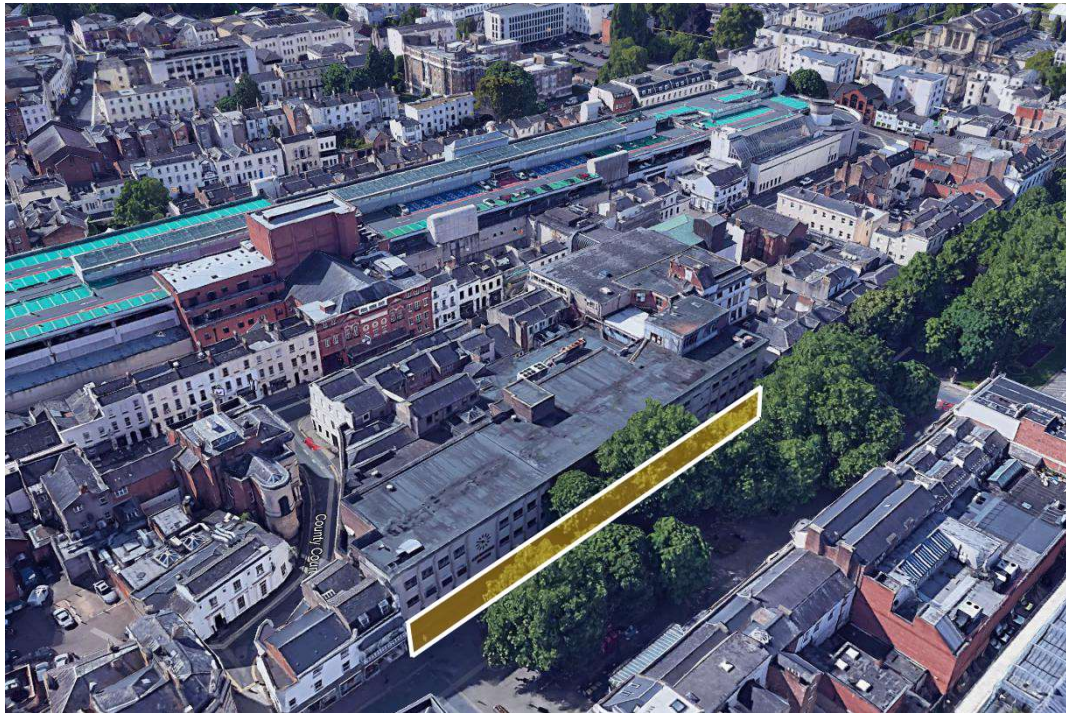
- We thought we might look at a live case study to further explore how these trends and changes might affect an important Cheltenham building.
- If it were to become vacant in the future..how might it be transformed?
- Cavendish House poses a huge challenge, but also a fantastic opportunity??

A LIVE EXAMPLE



- Large complex store over multiple levels unlikely to remain suitable for retail in the future.
- Prominent location along the Promenade.
- Mix of Building Types and many different connections to surrounding streets with different characters

THE CHALLENGE



- Retain ground floor retail facing out onto the prom, high profile with good footfall.
- Reduce unit sizes to allow for smaller 'Experience Stores', divided flexibly to allow for changing requirements
- Spill out into Promenade.
- Digital Shopfronts and Billboards activate promenade and extend retail experience.

RETAIL



RETAIL



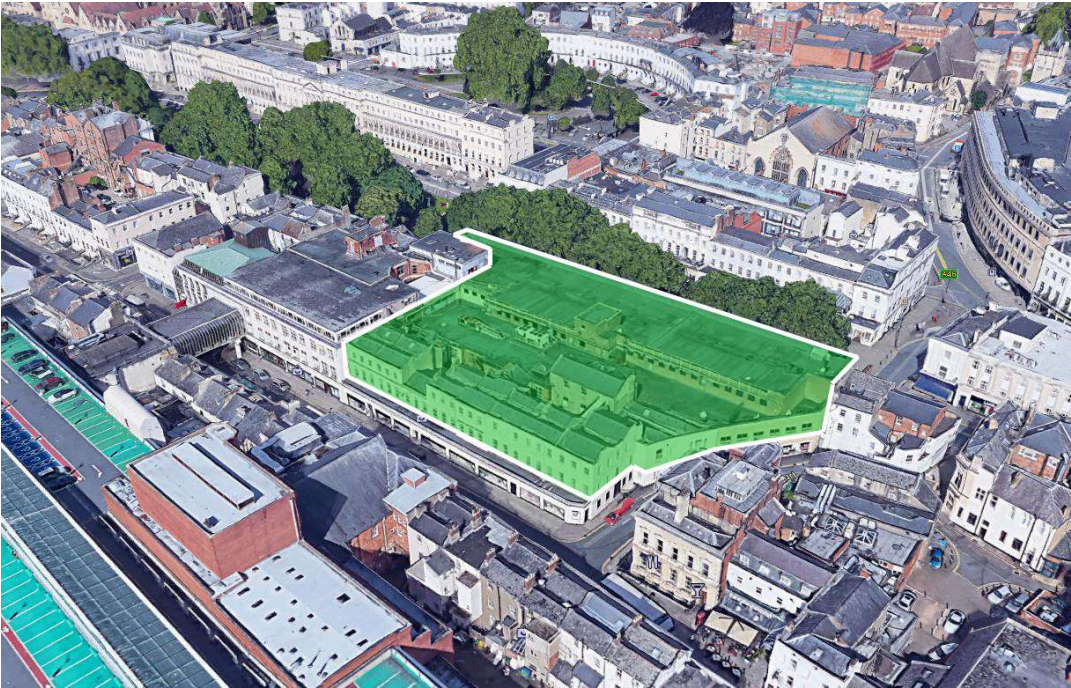
Samsung Concept Store

RETAIL



Tesla Highstreet Store

RETAIL



- Create 'Rooftop Living' on the upper floors.
- Convert space to larger duplex apartments providing affordable living accommodation...Fantastic views.
- Rooftop 'Gardens' providing biodiversity and 'safe' family recreational spaces.
- Access from County Court Road

RESIDENTIAL



Moberly Apartments and Roof Gardens, London

RESIDENTIAL



19 Townhouses over retail, Studioplex in Toronto

RESIDENTIAL



Via Verde Apartments and Roof Gardens, NYC

RESIDENTIAL



Providence Mall, Rhode Island

RESIDENTIAL



Providence Mall, Rhode Island

RESIDENTIAL



Providence Mall, Rhode Island

RESIDENTIAL



- Convert upper floors to create commercial office space.
- A mix of flexible co-working space together with potential large office space for businesses.
- Consideration also given to Education Use...imagine a Free School, College or University with space in the Towncentre showcasing Digital Cheltenham?

WORKPLACE



WeWork Office, flexible offices and Co-Working Space, Toronto

WORKPLACE



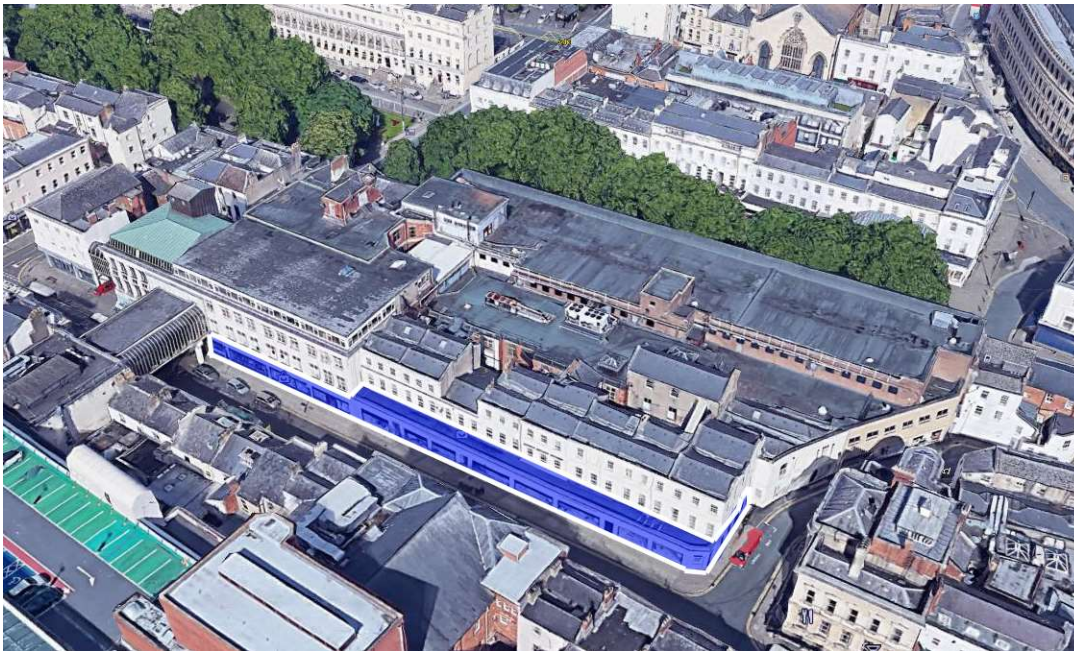
SLG Headquarters Office, Brewery Cheltenham

WORKPLACE



Flat Iron School..Cyber and Coding, guaranteed job or your money back!

WORKPLACE



- Convert back section of ground floor along Regent Street to Food and Beverage.
- New Grocery Store or Market with high quality food offering serving new influx from Residential and Office workers.
- Local Independent bar or coffee shop also located here.

FOOD AND BEVERAGE



Carlo Ratti, Milan Expo Concept Foodstore

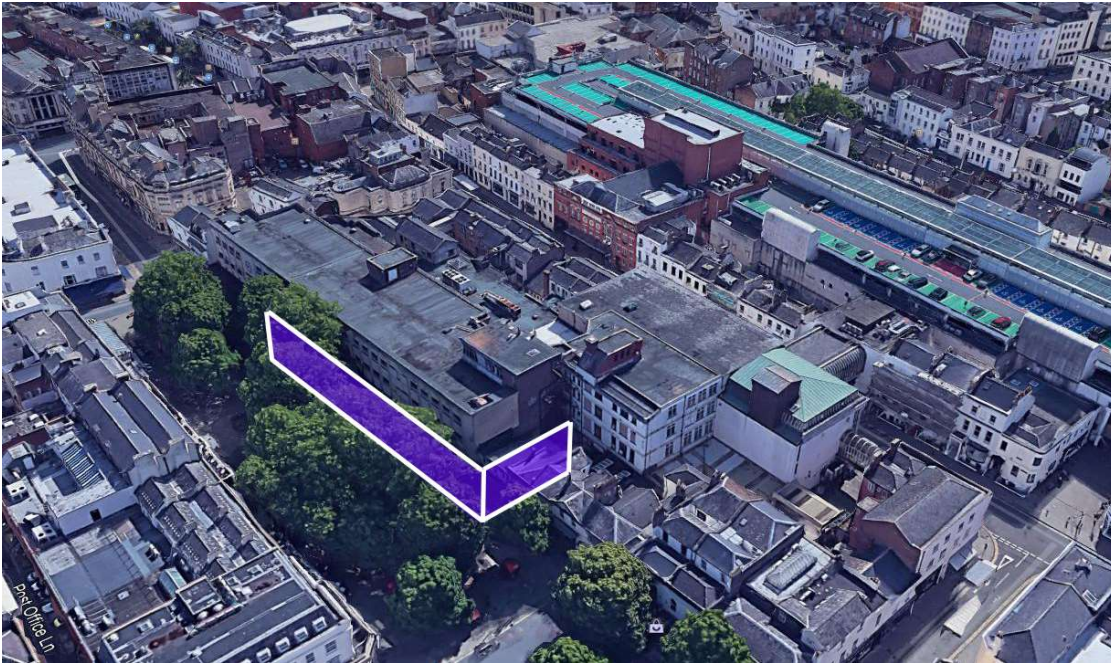
FOOD AND BEVERAGE



FOOD AND BEVERAGE



FOOD AND BEVERAGE



- Utilise 'difficult' basement area to provide a new Spa and Gym catering to the Residential and Office Workers.
- Limited current provision of gyms and spa's in the Town Centre.

LEISURE



Rise by WE spa/gym concept

LEISURE



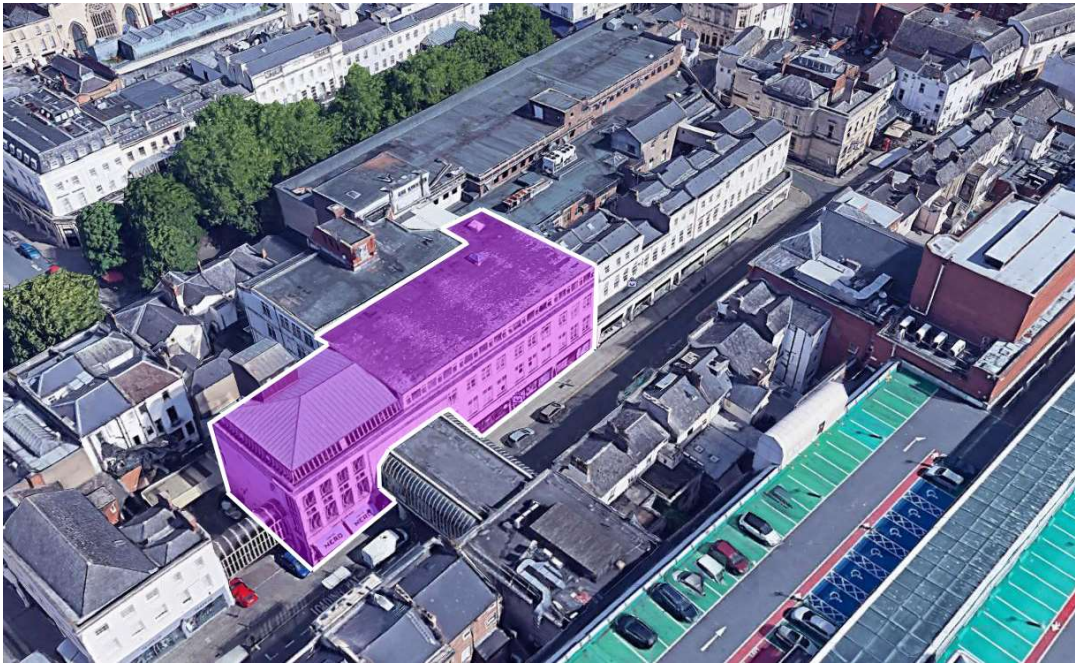
Rise by WE spa/gym concept

LEISURE



Rise by WE spa/gym concept

LEISURE



- New Flexible 'Eventspace' created to the Rear over two floors accessed from Regent Street.
- Allows Festivals a place to 'bleed' into the City and increase footfall.
- Utilise connection from Regents Arcade for evening event parking.

EVENTSPACE

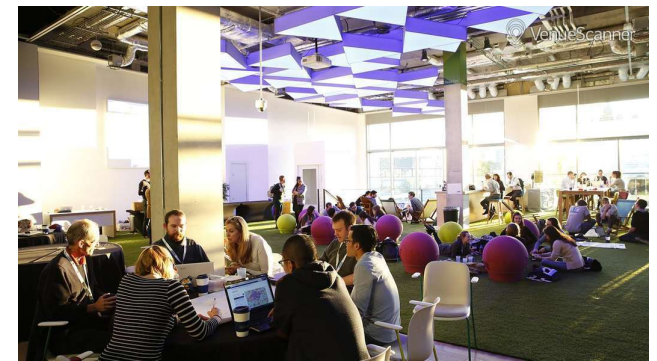


Plexal Eventspace and Flexible Workspace in Hackney

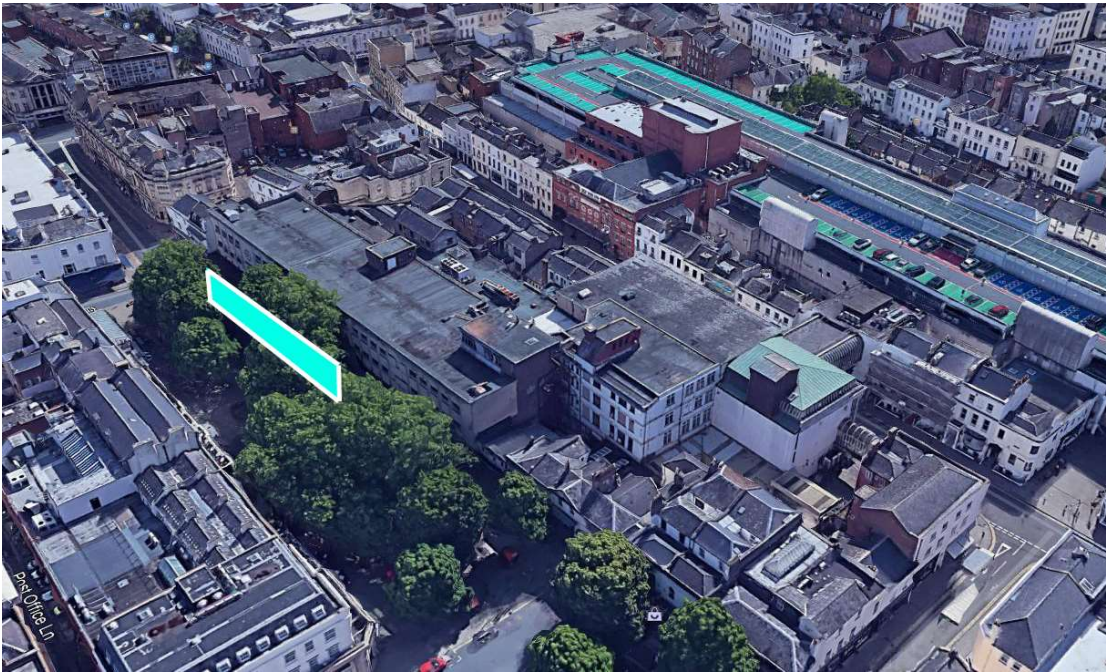
EVENTSPACE



Plexal Eventspace and Flexible Workspace in Hackney



EVENTSPACE



- Utilise basement towards Imperial Circus end to create a new 'Cycle Garage'.
- Office Workers and residents can check a bicycle in and out of storage which is brought up to them on return..giving safe convenient storage.
- Could also offer Automated Vending Shopfronts along the promenade.

TRANSPORT AND AUTO-VEND



The Eco Cycle Anti-Seismic Underground Bicycle Park, Japan

TRANSPORT AND AUTO-VEND



TRANSPORT AND AUTO-VEND



TRANSPORT AND AUTO-VEND



TRANSPORT AND AUTO-VEND



Blairgowrie Farm Shop Vending Machine

TRANSPORT AND AUTO-VEND

THANKYOU

Any questions?

THE CHELTENHAM PROPERTY FORUM

THURSDAY 19TH SEPTEMBER 2019



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