IPM Institute of Place Management

Manchester Metropolitan University

Heartflood

Booksellers as Placemakers

The Contribution of Booksellers to the Vitality and Viability of High Streets

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Placemanagement.org

Authors

This report has been written by an interdisciplinary team of academics and practitioners from the Institute of Place Management and Heartflood.

Chris Gregory

Before setting up Heartflood as a leading place advisory practice, Chris worked in the field for over 20 years and, in both Town Centre Manager and Business Improvement District Director roles, developed and led a range of award-winning projects including events, marketing campaigns and place management plans. A Fellow of the Institute of Place Management, Chris was awarded a distinction for his MSc Place Management & Leadership and has recently embarked on a PhD research project. In 2020, Chris was appointed as an expert by the national High Streets Task Force programme to help communities and local government transform their high streets.

Dr Regine Sonderland Saga

Regine is a research associate at the Institute of Place Management where she works across projects. Her background is in urban geography, and her PhD examined socio-technical challenges to the smart city from a citizen-centric perspective. Her research interests include citizen participation, stakeholder collaboration, and the implications of smart technology use and digitalisation in cities.

Prof Cathy Parker

Cathy Parker is Professor of Retail and Marketing Enterprise at Manchester Metropolitan University and Co-Chair of the Institute of Place Management, the professional institute for all those involved in making better places. Cathy is regarded as an international expert and leader in place management and is the research lead for the Government's High Streets Task Force. She is frequently asked to commentate on place and retail related topics and has recently appeared on BBC Breakfast, BBC Sunday Politics (NW), BBC Radio 5 live and ITV Tonight.

About the Institute of Place Management

The Institute of Place Management is the professional body for people involved in making, maintaining and marketing places. As part of Manchester Metropolitan University, the Institute of Place Management is dedicated to supporting people who serve places, providing them with unbiased research, continuing professional development, qualifications, conferences, events and networking opportunities.

About Heartflood

Heartflood are highly motivated specialists in Place Management & Development with particular expertise in facilitating the creation and management of Business Improvement Districts (BIDs) together with the provision of professional support in enhancing key social and economic locations such as town and city centres.

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Foreword

Professor Cathy Parker
Co-Chair, Institute of Place Management

This report has been prepared following a commission from the Booksellers of UK & Ireland to carry out research on the contribution of bookshops to the vitality and viability of UK and Ireland high streets, including a focus on the post-pandemic opportunities that booksellers have to contribute to the recovery and transformation of town and city centres. The project engaged over 200 individual booksellers and results were obtained via an online survey and through detailed interviews with a sample of survey participants.

This is the first-time research of this nature has ever been undertaken. Whilst shops and services make up the high street until now nobody has asked exactly how their businesses contribute to the health of the high street. It's been taken for granted that they do – but this research shows just how much bookstores do to make high streets vital and viable. From supporting schools and voluntary groups, to providing performance space, creating festivals and events – even providing space for breastfeeding your local book shop does so much more than just sell books. It has been a pleasure working with the Booksellers of UK & Ireland and I very much hope this research 'lays down the gauntlet' to other sectors – to encourage all high street shops and services to play a much bigger role in the towns and cities they are located in – the towns and cities that, ultimately, provide their customers and their livelihood.

Introductory Statement

Meryl Halls
Managing Director, Booksellers Association of the UK and Ireland

I am delighted that we are able to bring you this unique and innovative report from the Institute for Place Management. We aim to use the report to advocate ever more vocally for the importance of bookshops on our high streets, and for high streets themselves.

We've known, for certain, for a long time, at the BA, with awareness built over very many years, that booksellers were punching above their weight. We knew it instinctively, but working with the IPM at MMU, and the academic experts there, has allowed us to quantify and start to measure these qualitative impacts.

We had intended for some time to research the 'halo effect' of bookshops, and, inevitably, the pandemic blew that intention off course. But it also helped increase the impetus for commissioning the report now. COVID has created and accelerated a changed and changing landscape for retail, for town and city centres, and high streets and main streets more generally.

It's been fascinating to see the report take shape and hear the feedback from the IPM team – we now know just how engaged our bookshop members are in their local communities and their high streets, and how big and important an impact they are having. In 2017, we commissioned a very influential and effective economic impact report from economic consultancy CEBR; we very much see this report from the IPM as a continuation of that work. We want at all times to demonstrate just how crucial bookshops are, and how much of a lynchpin they can be in a successful high street.

Renowned academic Margaret Heffernan spoke several years ago at a BA Conference. One of the things that she emphasised as the fundamental need for collaboration in successful business. She became an enormous fan of bookshops during the course of her research for her Keynote Address – as so often happens with external speakers. But one of the most resonant things she said, and which has stayed with me in an oft-quoted phrase, is that it doesn't matter how good a bookshop you have, if it's on a failing high street, it won't survive. The fate of bookshops and the high streets they occupy is symbiotic and entwined. We know now how the leadership shown by bookshops can be a crucial difference in the life of that community, and we want to applaud our members for the work they do – and encourage and inspire more of our members to do the same.

When we saw the first draft of this report, and heard Chris Gregory say that if more retailers were like booksellers, the high street would have no problem, my colleague Laura McCormack said 'They all need to Be More Bookshop'. It's testament to the booksellers of the UK & Ireland that we can stand proudly behind that exhortation, and work with our members to improve and enhance our high streets and main streets and town centres.

Executive Summary

This report outlines the main findings of the research on the contribution of bookshops to the vitality and viability of high streets in UK and Ireland. The initial sections of the report summarise some of the main current structural changes facing high streets within towns & cities and explore how the recent pandemic has brought new and additional challenges for our centres. The report also investigates how far a specific retail sub-sector, booksellers, contribute to the top 25 priorities based on IPM's extensive research and engagement in relation to the vitality and viability of high streets and central places and then analyses the results from both the surveys and detailed interviews, which are summarised as follows:

- Booksellers significantly contribute to the vitality and viability of their high streets.
- All survey respondents contribute to the range, quality, purpose and overall diversity of the high street.
- Whilst over a third attempt to make town centres and high streets more accessible, many of the associated factors and activities are beyond the control of individual booksellers.
- Overall, the results show that booksellers are actively engaged in driving change and support in their local communities. However, this grassroots participation should arguably be supported to be more influential in local policy making and place leadership.

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Background and context

Recent circumstances are provoking intense debate about the decline, or even demise, of the high street. With a customarily keen eye for attention grabbing headlines, many sections of the national media are only too willing to report the demise of national multiple retailers, declining footfall, increasing retail vacancy, and how online retailing continues to erode in-store spending. Less reported perhaps, is how retail change connects to long-term processes stretching back decades, and despite proclamations about the end of the high street, many centres across the UK are performing well, and some thriving. What seems clear is how the pandemic is accelerating the uptake of online shopping, changing consumer priorities and transforming how and where we work, all of which will have profound implications for high streets and town centres. Whilst attention is currently focused on post-pandemic recovery, it is also important to recognise and understand the dynamic long-term processes that render high streets and towns in a constant state of flux and equally important to enact plans that address both their immediate recovery and long-term transformation. Before the pandemic, support for town centres and high streets was already high on the UK government's agenda with the announcement in 2019 of the Towns Fund, including the Future High Streets Fund, including £3.6 billion ring-fenced to support for towns in England. However, in light of the pandemic it became clear that additional immediate support was needed to ensure the survival of towns and high street businesses. In response, the government provided a multi-billion-pound package of support through rates relief, grants and the furlough scheme. More recently, the government launched a £56 million Welcome Back Fund to support the safe reopening of high streets. The government's response illustrates the severity of the challenge facing town and city centres.

The IPM has been at the forefront of extensive informed research on town centre change and more recently on recovery from the pandemic. Funding and additional support for town centres was strongly advocated in a report from the Expert Panel established by the then Minister for the High Street, Jake Berry, and led by Sir John Timpson. During 2018, the IPM supported the Panel, by holding workshops in locations across the country to hear first-hand the opinions, challenges and aspirations that town and city centre users of all kinds felt. Alongside The High Street Report from the Panel, the government also published a report from the Institute on High Street 2030: Achieving Change. Both reports were published in December 2018. Subsequently in 2019, following a successful bid, the IPM was appointed to lead the government's High Streets Task Force (HSTF), alongside a consortium of partners. The HSTF was set up to provide providing expertise, knowledge, training and support to those involved in helping to regenerate town and city centres across England. Since 2020, the IPM, through the work with the HSTF, has been at the forefront of research on town centre recovery and transformation, firstly producing the 'COVID-19 recovery framework' and the 'Routemap to Transformation'. Both frameworks have been widely adopted and adapted by places throughout the UK and Europe, including major cities like Liverpool and Newcastle and multiple locations across Greater London.

The changing high street

Footfall

The long-term picture for high streets is worrying. For the decade before the pandemic footfall was decreasing year-on-year, falling by almost 20%, although the added impact of coronavirus on high streets has been profound. Within a week of the announcement of lockdown measures across the UK in March 2020, figures from the data and intelligence agency Springboard showed that footfall was down 81.4% compared to the same period in 2019. Across the whole of 2020, footfall was down 28.3% compared to the previous year. However, this was the national average. Footfall fluctuated across the UK, with some places subject to additional lockdown restrictions. In addition, whereas footfall dropped the most in larger comparison centres, Springboard data showed that smaller towns fared relatively well. From March 1st to June 30th, 2020, footfall in smaller centres fell by 34.5%, compared to a drop of 75.9% in larger cities over the same period. The likely explanations for this disparity in footfall suggested that people no longer commuting to larger centres were compelled to use their nearest local centre during lockdown, and began to rediscover local assets and amenities, visiting local parks using local businesses. This impact is particularly marked in 'multi-functional' centres, which provide a wide range of services to their communities. Footfall also varied across other types of centre, with some holiday towns actually out-performing 2019 figures during particular weeks during the summer of 2020. It is therefore important that places analyse what is happening locally, as their experience may not necessarily reflect that of the 'average' town.

Working from home

Another consequence of the coronavirus pandemic has been a rise in working from home. ONS research suggests the number of people who did some work at home in 2020 increased by 9.4% compared to 2019, 35.9% of the workforce, which is more than 11 million employees. With large employers such as JP Morgan, HSBC and KPMG announcing plans to permanently allow workers to operate from their homes and suggestions more jobs are being advertised as working from 'anywhere', thousands of staff may never return permanently to the office, with flexible working becoming more normalised. Although it is too early to evidence the impact of changing working conditions, there are predictions that companies might begin to review the commercial space requirements and the need to maintain costly office space in centralised locations. With potentially fewer office workers, there is likely to be a significant impact on the local economy, in terms of demand for professional support services, building maintenance, transport infrastructure and providers, hotels, food and drink. Larger central city business districts have been most affected by these changes, demonstrated by the fact that, despite experiencing a visitor surge post-lockdown, footfall figures for central London are still nearly two-thirds down on 2019. However, these changes, if made permanent, may lead to the rise of "secondary cities" – smaller towns and rural areas who stand to benefit from the pursuit of workers to achieve a better quality of life in a greener environment. To capitalise on this development, however, may require these locations to adapt, with calls for more commercial and flexible working space on high streets, together with more diverse retail and hospitality sector.

Store Closures

According to the Centre for Retail Research, the high street lost 5,214 stores in 2020, the highest figure on record since 2009, affecting an estimated 109,407 employees, also the highest amount on record by some distance. Big name casualties included Debenhams, the oldest retail chain in the UK, which went into liquidation in December 2020, with plans to close 97 stores. Others included Arcadia, the parent company of big-name brands such as Topshop, Dorothy Perkins, Burtons and Miss Selfridge, and a range of others also closed including Poundstretcher, Go Outdoors, Monsoon, Oasis, Warehouse and Laura Ashley. Notably, some of these brands will live on, but only online. Whilst the economic effects of the pandemic played its part in some of these closures, there are other factors to consider, including new competition, lack of investment, high property costs, and over-expansion. In the last decade, multiple retailers going into administration or announcing store closures have seen over 26,000 units close (CRR 2019), suggesting that this is not the consequence of the coronavirus alone. Furthermore, with the continuing rise of online shopping, retailers no longer need an extensive network of branches to achieve national coverage. The likely scenario for many places are that national multiples are unlikely to return to their centres in any great numbers, and towns can no longer rely on bricks and mortar shops to drive footfall and commercial investment. Whereas much media commentary focuses on retail, the contraction of other services traditionally found in town and city centres is perhaps over-looked. The shift to greater online service provision and need to cut costs has seen more than 4,000 bank and building society branches close across the UK over the past six years. This disruption also threatens over 7,500 estate agents. The problems facing high street travel agencies, who were challenged by online competition, have been compounded by enforced travel bans, with 88% potentially facing closure. According to a survey by Which? Magazine, cash machines are also disappearing, with a reduction of 9,500 between 2018-19. This will most likely accelerate further due to the adoption of cashless payment systems that most businesses have shifted to during the pandemic.

Online shopping

In 2019, the UK led the world in online shopping, which accounted for 19.2% of all retail sales. Pre-pandemic, predictions suggested this would rise to 30% by 2030, but with the forced closure of bricks and mortar shops during lockdown, online sales grew rapidly, peaking at 36.4% in January 2021 the highest annual growth seen since 2007. According to KPMG, high streets could lose between 20-40% of their retail offering as a result of the growth of online retailing. Basingstoke, Bracknell and Guildford appear to be the worst affected, with up to 39% of retail jobs made vulnerable by the shift to online sales. Across all the towns and cities covered by KPMG's analysis, there could be nearly 400,000 job losses on the high street, affecting between 1-5% of the labour force. With ASOS, the online fashion retailer, acquiring the brands of Topshop, Topman and Miss Selfridge for the value of their digital brand presence, and with competitor BooHoo, purchasing the Burton brands, Dorothy Perkins, and Wallis, along with the Debenhams brand and website, it underlines the extent to which our high street experience is going online. Places, however, should be cautious in responding to claims retail will disappear. Even with 30% of retail sales online, 70% remains in-store. Retail expenditure, in general, is expected to grow as the population size of the UK increases. In short, town centres may have a smaller slice of retail spend going forward, but the cake will be bigger.

Out-of-town Shopping

Over the last 40 years, the UK has experienced a growth and spread of out-of-town shopping. In 1994, just 14% of retail development was happening in town centres, leading to tighter planning policies requiring a ‘town centres first ’approach and the introduction of the sequential test, designed to funnel new retail development into centres. Although this guidance limited the development of new mega-malls, in general it did not prevent retail expansion out-of-town, through retail parks and supermarkets, with over 4 million sqm of new retail space constructed from 2001-11. Town centres within 10 miles major out-of-town retail development saw footfall deflections, on average, by 30%. Consequently, and notably before the advent of online shopping began, town centres continued to see their share of retail expenditure decline to just under 50% by 2000, falling from 75% in the 1970s. In 2018, the Centre for Retail Research estimated the town centre share had declined to 36.6%, with a projection it would decline further to 34% by 2022. The competition to town centres from out-of-town retail once seemed an insurmountable challenge, but the restructuring of the retail sector has created particular problems for malls and shopping centres, especially those dependent on large department store anchors and national multiple retailers. One of the UK’s largest operators, Intu Properties, with a portfolio including some of the largest UK retail malls such as Manchester's Trafford Centre, Nottingham's Victoria Centre and Norwich's Chapelfield, fell into administration in June 2020 with total debts of £4.5bn. The shopping centre giant Hammerson also posted a £1.7bn loss in March — the largest in its history — after the COVID-19 pandemic wiped £2bn off the value of its property portfolio. Covered shopping centres are experiencing declining investment, the highest fall in footfall, and largest increases in vacancy rates, with long-standing tenants disappearing, and those remaining perhaps unwilling to honour existing rental costs. As can be imagined, the scale of change taking place is beginning to have an impact on retail property values. Recent advice from the Royal Institute of Chartered Surveyors suggests we can no longer rely on past valuations. With the sale of shopping centres significantly below previous values (some to local authorities), and some property owners taking bold steps to mark down, new opportunities are arising to rethink the function of town and city centres. It may be the case that more towns might need to follow the lead of Stockton, where the local authority took control of a shopping centre and revealed plans to demolish it, and instead replace it with a hub for public services and new public park.

Ageing Towns

As town and city centres change, they also have to respect wider changes in society. Overall, the UK population is growing, but it is also ageing. Over the past two decades, the average age of a UK resident has risen by two years, to 40. Within 30 years, it is anticipated that one in four people will be aged 65 and over, and the number of people aged over 85 will have doubled. Yet this ageing process is not happening uniformly across the UK. Overall, towns are getting older whilst are cities are getting younger. Since 1981, Britain’s towns have lost more than a million people aged under 25, while gaining more than two million over65s. In contrast, the UK’s main cities have seen more than 300,000 under-25s arrive and 200,000 over-65s leave. This problem is perhaps most keenly felt in coastal towns such as Blackpool and Scarborough, which could see a 7% fall in the number of people under 30 living in the area by 2039. In contrast, coastal authorities in the south, such as Bristol, Southampton, and Canterbury, could see substantial rises in the number of children and young people. Town and city centres can play a vital role in providing for the needs of an ageing society, not just through residential provision, but also through providing activities, health and educational facilities and opportunities. This is becoming increasingly important for smaller towns, which will more than likely see their labour markets become less dynamic and suffer from further strain on health and social care. Attempts to bridge the gap between the young and old should be welcomed across all communities, and there is nowhere better to centre that activity than around the high street to foster inter-generational contact and exchange. An important consideration, however, is the nature of ageing is also changing. Older generations are likely to be fitter, more active and likely to be working to a later age compared to previous ones.

Experiential economy

With customers now able to buy almost anything they desire from the comfort of their own home, more retailers are having to provide a reason for people to travel to their stores. The rise of experiential retail has occurred as a result, offering consumers a combination of entertainment and retail to deliver a personalised experiences. An example of this includes House of Vans, which provides an open-to-all, free to use indoor skate bowl for visitors to its store in central London. Another development, termed retail+, refers to a growing number of stores, where customers might do courses: learn how to bake, to sew, to knit, to mix cocktails and even drive a sports car by using virtual reality. We are also seeing demand for variety, delivered through pop-ups, encompassing everything from market stalls, to events space used for entertainment, health, education and other community-focused activities. The high street, therefore, is becoming a place to ‘do’, as well as ‘buy’. With more flexible and short-term leases, pop-up and meanwhile uses, seasonal offers, and events, the future high street may well offer a new experience each time you visit.

Technological Changes

By 2030, it is anticipated that our retail experience will be very different. Retailers will know far more about us through accessing our data, enabling greater personalisation. Currently people make about two thirds of their online purchases on a mobile device, but, with the rise of the Internet of Things and AI, an increasing proportion of the goods we order will become subject to automatic payment and delivery. Retailers such as Schuh and Asos have already seen mobile spending quadruple in just six years, totalling close to 80% share of online purchases. In the last year, we have seen the rollout of the first Amazon Go store in the country, opening in Ealing, West London. The stores allow customers to shop and leave without queuing, with purchases tracked by in-store cameras and sensors before charging customers using the Amazon app. The move towards hyper-convenience may be a paradigm shift in the way that consumers view convenience, with no long queues or self-service checkouts slowing the shopping experience down. Technology is also allowing new transport options in cities. Apps such as Whim offer seamless travel by a range of modes within urban areas, and they will become more commonplace as many cities ban or restrict cars in their centres. With data from the Universities of Oxford and Bristol finding that there has been a 40% decline in 18-24 year old car drivers now compared to the 1990s, it suggests we are entering a world with declining demand for private vehicle ownership, with implications for the level of road transport infrastructure and parking requirements in town centres. For those trips that still use the car, the growth in electric vehicles will do much to improve air quality in town and city centres, with forecasts that 30 million will be on the road by 2030. Renault Nissan will launch 10 different electric cars this year and claims 84% of buses will be electric by 2030. We are also seeing the development of autonomous vehicles, with expectations that 50% of vehicles will be highly autonomous by 2030. Research by the University of Toronto suggests this will increase car-parking capacity in urban areas by 62%. These developments, however, do not necessarily address the continuing problems of congestion within centres. The pandemic, for example, brought to attention to paucity of public realm within many centres, in terms of both quality and quantity, drawing attention to the domination of road infrastructure in centres. This created a particular challenge for many places in relation to street-trading and the safe reopening of hospitality. To create safer, more liveable, and walkable places, and centres which are perhaps more resilient to the impact of a global pandemic, cities across the world are beginning to rebalance the amount of space given over to vehicles, to pedestrians and cyclists, creating car-free zones and streets that can be dynamically rebalanced according to need. The IPM often encounters local concerns about levels of parking and road access to centres, but there is little evidence to suggest restrictions will impact on trade. In certain cases, it is often the reverse, with increased visitor numbers and dwell-time.

Lessons from wider experience

In 2014, as part of the Economic and Social Research Council-supported High Street UK2020 project, the IPM undertook a comprehensive literature review to identify factors contributing to centre vitality and viability (see Parker et al., 2017). This produced some 160 factors, which formed a point of discussion with multiple stakeholders in the ten UK town centres who were partners in the project (see table below). This process identified additional factors, which we could link to published academic research, but it also revealed new factors, yet to be studied by academics. In total, the study identified 201 factors that affect town centre vitality and viability. The systematic review was replicated in 2020 for the High Streets Task Force, which took into account recent evidence and research, which subsequently extended the number of factors to 237. However, as they stand, the factors have no sense of priority or importance. Therefore, 22 leading town centre experts drawn from practitioners and researchers were asked to rank them using two scales: how much a factor impacted on town centre vitality and viability, and how much local control could be exercised over a factor. This then led to the 'Top 25 Priorities' impacting vitality and viability, detailed in Appendix 1.

High Street UK2020 Partner towns	
Alsager	Congleton
Altrincham	Holmfirth
Ballymena	Market Rasen
Barnsley	Morley
Bristol	Wrexham

Specific conditions relating to booksellers

With regard to British booksellers, a 2017 report produced by the Centre for Economics and Business Research (CEBR) pointed to what was already an increasingly challenging trading environment before the pandemic. The CEBR research concluded that all-important margins on had come under pressure from a number of sources, including online trading, the business rates & corporation tax systems and other retail cost pressures, such as rising utility bills, the National Living Wage and staff pensions – and reported that this range of factors threatened the very existence of Britain's local and national booksellers. However, the report also highlighted a wide range of inherent strengths within the bookselling sub-sector, which include the following:

- Traditional bookshops have potentially more direct and tangible supply chain transmissions for the UK economy at large and, as such, the economic multipliers and links are likely to be stronger.
- Bookshops provide local jobs that are dispersed across the country, rather than concentrated in specific areas.
- Bookshops provide a physical interface which can trigger different and unpredictable exploration of themes and topics beyond what was intended when entering the shop.
- Events and activities organised at bookshops can produce an interaction of ideas and inspiration.
- Booksellers create interactive involvement to encourage reading for pleasure, especially among children, through bookshop-hosted and run events and outreach work in schools, libraries and other settings.
- Bookshops offer high-quality career jobs, not just 'filler' jobs, and for some a route into authorship.
- Bookshops provide artistic and cultural hubs through author book signings, toddler hours, comedy nights, poetry readings, literary festivals or story times.
- The presence of bookshops can be expected to support wider high street activity, helping to prevent urban decay, increase or maintain property values and provide footfall for neighbouring businesses.

The need for this report

Since the publication of the CEBR report, booksellers and bookselling have undergone changes that have happened both organically and been forced by the impact of COVID-19, with some of the developmental changes that were underway being accelerated by the pandemic.

Even before the pandemic we were seeing the strong evolution of booksellers as community champions.

The primary focus of the CEBR report was the economic contribution that bookshops made to their local economies, the national economy, the wider publishing industry and the exchequer Having clearly established this, the Booksellers Association wanted an independent academic body to assess and report on the social contribution to their communities and commercial contribution they make to the retail health of their town centres.

Methodology

The project engaged with individual members of the BA in a range of locations across the UK & Ireland and data were obtained via an online survey and detailed follow up conversations with members of the BA Advisory Council. The online survey was emailed out to members of the BA and was open between August and October 2021, with a total of 205 usable responses being obtained.

Survey design

The online survey included 100 statements allowing a measurement of the degree to which respondents contribute to the top 25 vitality and viability priorities. There were five statements relating to each priority which respondents could select yes or no to. The statements included a range of factors, such as the degree to which booksellers:

- Liaise with other retailers or organisations in their locality.
- Collect or act upon local data.
- Promote or market the centre in which they are based.
- Deliver in-store events that add to the cultural offer.
- Support place management initiatives within their town or city.

The survey also allowed the submission of detailed additional information asking booksellers for best practice examples of how they add to the vitality and viability of the locations they trade, and this provided a range of qualitative data.

In summary, the survey revealed that none of the booksellers engage with less than 12 priorities and that the majority contribute to 22 priorities. The top three vital and viable priorities that booksellers contribute to are diversity, merchandise, and appearance, whilst the priorities found more challenging to contribute to were place management and accessibility. The qualitative data identified a variety of examples detailing how booksellers actively contribute to the 25 priorities, ranging from supporting local schools and churches to providing a helping hand to local residents and collaborative place marketing.

Analysis of survey data

A total of 205 survey responses have been subject to detailed analysis and the main results of the survey analysis is outlined in this section of the report. Table 1 below demonstrates the breakdown of respondents' country, type of bookshop, gender, and age. The demographics are somewhat imbalanced, with a majority consisting of English, independent booksellers with only one outlet.

Table 1. Respondent Profile

Respondent Profile (*n*=205)		
Demographics	**#**	***(%)***
Location		
England	161	(79%)
Ireland	13	(6%)
Northern Ireland	2	(1%)
Scotland	17	(8%)
Wales	12	(6%)
Type of Bookshop		
Independent bookshop, but part of a business with more than one outlet	22	(11%)
Independent bookshop, with only one outlet	164	(80%)
Chain bookshop, part of a business with more than one outlet	19	(9%)
Gender		
Male (including transgender men)	55	(27%)
Female (including transgender women)	139	(68%)
Prefer to self-describe	4	(2%)
Prefer not to say	7	(3%)
Age Group		
25 – 34	12	(6%)
35 – 44	22	(11%)
45 – 54	50	(24%)
55 – 64	55	(27%)
65 – 74	18	(9%)
Over 74	3	(1%)
Unknown	1	(.5%)

The survey found that booksellers actively contribute to vitality and viability of high streets as none of the booksellers engaged with less than 12 priorities. Figure 1 illustrates how many priorities booksellers engage with.

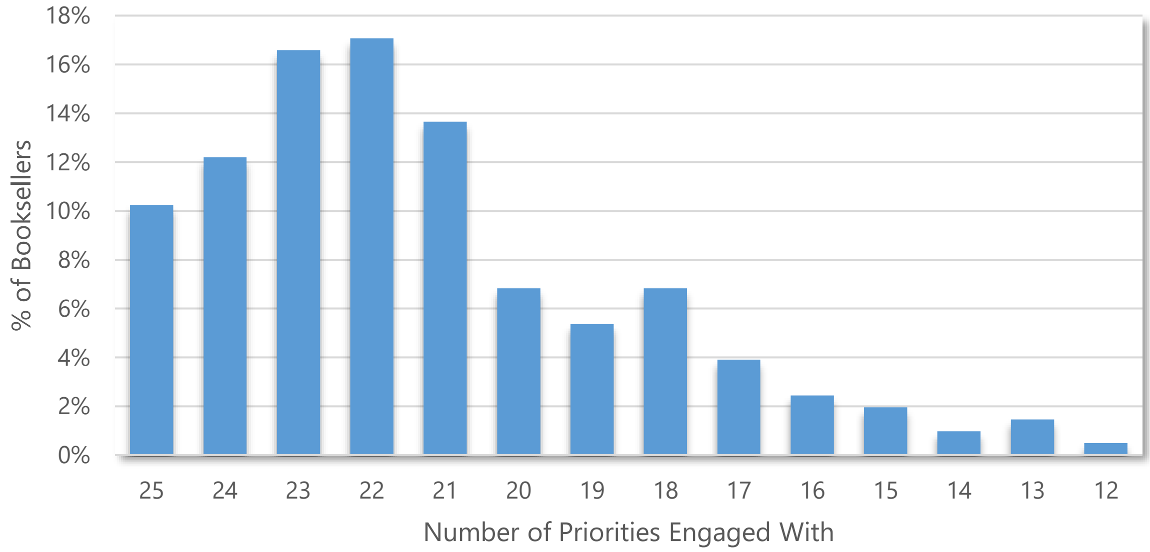

Figure 1. Number of Priorities Engaged with by Booksellers

In order to determine how booksellers contribute to the vitality and viability of the high street, the analysis first looked at how many booksellers engage with each of the priorities. As such, Table 2 ranks each priority in order based on the percentage of booksellers found engaging in activities relating to them. Where the percentage was tied, the mean score of the priorities were used to rank them. The survey found that all booksellers contribute to the diversity of the high street, but only 35% contribute to accessibility. Then, to understand in more detail how booksellers contribute to the priorities, a total of 66 meaningful comments were obtained describing best practice examples across the UK and Ireland. The sections below will present each priority in detail, presenting these survey findings.

Table 2. Priorities Ranked after % of Booksellers Contributing to them

Rank	Priority	% of booksellers engaged
1	Diversity	100%
2	Merchandise	99%
3	Appearance	99%
4	Innovation	99%
5	Place Marketing	98%
6	Walking	98%
7	Functionality	97%
8	Experience	97%
9	Liveable	96%
10	Activity	95%
11	Anchors	94%
12	Attractiveness	93%
13	Non-Retail Offer	92%
14	Recreational Space	92%
15	Adaptability	92%
16	Retail Offer	88%
17	Redevelopment Plans	86%
18	Necessities	85%
19	Networks & Partnerships with Council	77%
20	Markets	77%
21	Barriers to Entry	70%
22	Vision & Strategy	68%
23	Safety/Crime	60%
24	Place Management	44%
25	Accessible	35%

1. *Diversity*

All booksellers surveyed contribute the range/quality/purpose and overall diversity of the high street. The diversity of offer of the high street is more than retail as they continue to evolve into community hubs. One bookseller elaborated on how their bookshop supports local causes:

> *"We engage with local issues and donated 5 laptops to a needy school earlier this year."* **- (Independent bookshop with only one outlet, England).**

The survey revealed plenty of other examples of how booksellers are diversifying, supporting so much more than shopping in towns and cities such as selling tickets for local events, and help groups and organisations.

2. *Merchandise*

The survey showed that 99% of booksellers contribute to the range and quality of goods on the high street. Many examples were noted around how booksellers took the opportunity to promote local centres and communities through the merchandise stocked in their stores:

> *"Our shop sells rare, collectable and second-hand books. We buy our stock from the local community, which supports the local circular economy. Our customers are our suppliers too, so we are perhaps even more embedded in the community than a bookshop that sells new products."* **- (Independent bookshop with only one outlet, England).**

3. Appearance

Priorities that booksellers are actively involved in, that are not only about own retail operations and strategy, were also ranked high as the survey identified that 99% of booksellers contribute to the overall appearance of the high street. This ranged from cleanliness and the look of their shop windows/frontages, to collaborating on the appearance of the broader community as one bookseller demonstrated:

> *"We work with local groups such as The Rural social Scheme and The Men's Shed to enhance the appearance of the village."* **- (Independent bookshop with only one outlet, Ireland).**

4. Innovation

Many of our high streets have been serving their communities for five hundred years and retail is constantly evolving to meet changing customer needs. As such, the survey found that 99% of booksellers contribute to innovation and experimentation on the high street. Changes booksellers make in their businesses contribute to this evolution and as this quote demonstrates, this change is not always about technology:

> *"We haven't adapted our business online during COVID but took the radical decision to keep the conversations going with our customers over the phone and to offer as personal service as possible - keeping it human and using 21st Century tools to support traditional bookselling."* **- (Independent bookshop with only one outlet, England).**

The pandemic has rekindled an appreciation of local service and human contact, in many people, and the comments highlight this in particular.

5. Place Marketing

Somewhat like linked trips, collective marketing efforts that get people into town, and where retailers recommend and support each other are far more effective than everyone only acting independently. The survey revealed that 98% of booksellers contribute to the place marketing and centre marketing of the high street and one example in particular identified illustrated collaborative marketing efforts well:

> *"Clitheroe is a town full of independent shops and we all support each other through social media promotion."* **- (Independent bookshop with only one outlet, England).**

Marketing and place-based collaboration over social media has also been fuelled throughout the pandemic as many businesses have been forced to re-think their strategies.

6. Walking

The survey found that 98% of booksellers contribute to the walking and pedestrianisation/flow on the high street. Whilst this figure could be higher than some may expect. However, because respondents regularly tell customers about other retailers or attractions that they can visit nearby, it demonstrates how booksellers impact on linked trips or visits where customers use a variety of shops and services which in turn are very important to a town's success. In addition, comments bore evidence of booksellers influencing decisions around pedestrianised areas too:

> *"[I] use my influence to improve the centre of the town (e.g. supporting new pedestrianisation)."* **- (Independent bookshop with only one outlet, Wales).**

7. Functionality

Not all high streets are the same as some are more locally focused than others and some are destinations, focusing on attracting people from a much wider catchment. Understanding the function of your town is important – especially as it evolves. As such, the survey found that 97% of booksellers contribute to the functionality and role of the high street. From the comments, it was evident that bookshops played an invaluable role in shaping the identity and function of their town centres:

> *"[...] it is very clear that the town is benefiting from having an independent bookshop and that I am seeing people coming from other areas to visit the bookshop and then continuing their visit to the town, browsing in the other independent shops and eating in the cafes and restaurants. My bookshop is helping Stewarton become a 'destination' town."* **- (Independent bookshop with only one outlet, Scotland).**

8. Experience

It is seldom customers visit only one shop as part of their trip to a high street or town centre. They come for linked trips and increasingly want a town centre experience – they want to feel atmosphere and uniqueness when they go to different places. 97% of booksellers contribute to that experience and the overall town centre image through a range of activities, for example, enhancing interactivity, some in more different ways than others:

> *"We occasionally like to hide books around town to give something back to our customers and visitors to the town."* **- (Independent bookshop, but part of a business with more than one outlet, England).**

9. Liveable

96% of booksellers contributed to the liveability of the high street, highlighting the role of community in town centres. Recent changes to planning legislation means we are more likely to have residents in our town centres and with an ageing population more of these may be older. There were many examples of how booksellers make centres more liveable – from chatting to people, to taking in parcels for nearby residents, with perhaps the extra attention given to the elderly customers:

> *"We encourage our elderly customers to pop in even if it's just for a sit down and a chat, sometimes we're the only people they have spoken to."* **- (Independent bookshop, but part of a business with more than one outlet, England).**

10. Activity

Activity is the '25 priorities' framework's number one priority and the survey found that 95% of booksellers contribute to the activation of the high street. It is of utmost importance that the town is open when people want and need to visit it and the comments demonstrated excellent examples of collaboration to enable this:

> *"We collaborate on issues such as opening hours and safety protocols, so that there is a level of consistency across the High Street."* **- (Independent bookshop with only one outlet, England).**

11. Anchors

Anchors are linked to functionality of the town and are important institutions that give locations their basic character and signify importance on the high street. 94% of booksellers contribute to anchors and the comments gave several examples of how bookshops support anchors such as schools, large employers and faith organisations which strengthens the town:

> *"We are a Christian bookshop so we liaise a great deal with local churches and schools, we actively go out to these venues to set up book stalls either as part of regular activities or for special events."* **- (Independent bookshop with only one outlet, England).**

12. Attractiveness

The survey showed that 93% of booksellers contribute to the economic attractiveness of the high street. For some, this meant taking on vacant units in the town:

> *"We have taken on a unit that has been vacant for two years, and, opening in April this year, turned it into a vibrant part of the high street."* **- (Independent bookshop with only one outlet, England).**

Other examples included monitoring data about the catchment profile and participating in pop-up schemes i.e. setting up a temporary booth/stall.

13. Non-Retail Offer

As 92% of booksellers were shown to contribute to the non-retail offer and attraction of the high street, a range of examples were identified in the survey, highlighting the many ways in which they do so. Whilst some participated in or supported local events and festivals, others hosted groups and activities for various groups of people, clearly demonstrating that bookshops provide so much more than products to the high street. As one bookseller explained:

> *"We work a lot with local schools - both the privileged and the less so. We organise authors to go into schools to talk to and meet children. We host groups of children in the bookshop for all sorts of activities. Story-telling for younger children, book clubs for older. This has a cyclical benefit for the whole high street - encourages children and their parents to visit both us and other shops around us."* **- (Independent bookshop with only one outlet, England).**

14. Recreational Space

According to the survey, 92% of booksellers contribute to improving recreational space and public space on the high street. Although this was higher than expected, it is apparent bookshops contribute strongly to the improvement and usage of recreational space in town centres with so many stocking books and maps about local greenspace, encouraging people to visit and engaging in talks and other initiatives. This quote emphasised one the many creative ways in which booksellers do this:

> *"In the summer we take our children's reading groups to local parks. We ran a local KidsBookFest with a local animal farm."* **- (Independent bookshop with only one outlet, England).**

15. Adaptability

Similar to innovation, adaptability is about the physical changes on the high street and the survey showed that 92% of booksellers contribute to the adaptability and flexibility of the high street. There were several comments describing how booksellers altered their operations to not only adapt to change, but to expand the offer of the high street:

> *"We have managed to add extra shelving to about 12 bays in order to increase our range and offer more choice. We have invested in a transactional website so that customers have more options in terms of how they shop with us."* **- (Independent bookshop with only one outlet, England).**

Retail units and high streets need to be able to physically restructure to adapt to people’s changing needs and wants. This has particularly been important throughout the pandemic as carrying on as normal became impossible.

16. Retail Offer

The survey identified that 88% of booksellers contribute to the retail offer and retail representation on the high street which is perhaps a little lower than expended. However, the nature of the questions asked in regards to this priority sought to explore whether the bookshops were unique in their location which potentially in larger locations, respondents answered no. The rationale for asking in this manner was to highlight that all high streets should have at least one book shop, otherwise the overall attractiveness of the location is reduced. Especially one comment elucidated the significance of being the only bookshop in and around the area:

> *"There has been no bookshop in the town for 10 years or more, with the closest bookshop 10 miles away, and it has become a magnet for local retirees, families and other shoppers from the town and nearby villages, as well as visitors to the town."* **- (Independent bookshop with only one outlet, England).**

17. Redevelopment Plans

Many booksellers (86%) contribute to the redevelopment plans of the high street as they are actively involved in regeneration plans and consultations. The comments illustrated ways in which booksellers engage in driving their local high streets forward. However, this quote demonstrates that getting involved is not as easy as it should be:

> *"In terms of the revitalisation of our town centre, I think every independent retailer would want to be involved but it is very difficult on a practical level to know where to start or how to achieve real change/improvements without leadership, initiatives and innovation from local government."* **- (Independent bookshop with only one outlet, Ireland).**

Therefore, whilst there may be willingness to build capacity amongst businesses, there is limited formal structures in place to truly drive this change forward.

18. Necessities

Necessities include the basics such as car and bike parking, seating and public toilets and the survey found that 85% of booksellers do indeed contribute to these general facilities on the high street. The comments emphasised how booksellers allowed customers to use these facilities:

> *"It is shop policy that we welcome and support all customers: allowing them to use the toilet, being very welcoming to children, making a cup of tea and providing an ear to someone who is having a bad day."* **- (Independent bookshop with only one outlet, Scotland).**

The closure of public toilets throughout the pandemic has been a major blow for many towns and stops people visiting, perhaps especially families with younger children.

19. Networks & Partnerships with Council

The survey revealed that 77% of booksellers contribute to networks and partnerships with council and community leadership on the high street. The many examples given in the comments about the partnerships and initiatives booksellers are involved in that activate towns were remarkable, with collaborations across several types of organisations both in private and public sector:

> *"We work closely with other businesses and the local council, to provide a range of events for the community: markets, children's entertainment, mini festivals."* **- (Independent bookshop with only one outlet, England).**

20. Markets

77% of booksellers contribute to markets and street trading on the high street, and the survey illustrated several examples of not only how they participated in markets, but establish them too:

> *"We have embraced the community aspect as much as possible and even established an Indie Market as The Totally Locally Indie Market Brigg with its own team to run it." -* **(Independent bookshop with only one outlet, England).**

Well-run markets are an asset to any town, increasing footfall by over 25% and so markets are major attractions for town centres.

21. Barriers to Entry

Through for example offering opportunities to young people such as work experience, 70% of booksellers contribute to reducing barriers to entry and supporting new businesses on the high street.

> *"We offer tailored work experience for local young adults and teenagers."* - **(Independent bookshop with only one outlet, England).**

This was done through collaboration with local schools and colleges, also adding to the collaborative actions on the high street.

22. Vision & Strategy

Many booksellers (68%) are in some way involved in setting the vision and strategy in their towns and the comments demonstrated the high eagerness to engage in these activities. For example, one respondent had even been elected as a local councilor. Worth noting however was the call for more local support for the everyday activities and ideas:

> *"I am always seeking ways of involving others in town regeneration, I have noticed recently some individual initiatives for example a resident putting out planted tubs, the men's shed adopting a passage way and providing seating and plants. Perhaps more support for local ideas less emphasis on the "big" ideas and "strategies" more grass roots."* - **(Independent bookshop with only one outlet, Scotland).**

This links back to the point raised in relation to the redevelopment plans priority where call for improved structures to drive change is required as grassroot capacity is evident.

23. Safety/Crime

The survey found that over half (60%) of booksellers contribute to enhancing perceptions of safety and measuring crime on the high street, ranging from making people feel safe on and around their premises to monitoring crime rates. Some even provided on site assistance in case of incidents happening:

> *"We have first aiders on site and help with accidents in immediate vicinity."* - **(Independent bookshop with only one outlet, England).**

24. Place Management

Almost half of booksellers (44%) contribute the place management and related partnerships on the high street such as trader's associations and BIDs:

> *"We are also at the heart of our local High Street Trader's Association and were the instigators in Linlithgow becoming a Totally Locally Town."* - **(Independent bookshop with only one outlet, Scotland).**

This is a reflection of the active participation and collaboration demonstrated in relation to other priorities. However, this also means that whilst capacity for change is evident, some locations still need to rethink their governance structures to include a broader spectrum of stakeholders.

25. Accessible

Whilst over a third (35%) attempt to make town centres and high streets more accessible, many of the associated factors and activities are out of booksellers' hands such as bus and train services. However, the quote blow illustrates that thinking about what is needed and as such working with others to lobby is something booksellers might consider in order to impact on this priority:

> *"As a small town (pop. 8000) we have very little public transport serving the town centre streets. I wonder would a shuttle service for the town centre be a viable option." -*
> **(Independent bookshop with only one outlet, Ireland).**

Many booksellers expressed issues around accessibility and so perhaps there is an opportunity to voice these problems to town teams, BIDs, councils or MPs, which can also help developing foundations and collaboration for structures for change.

Interviews

A further component of gathering the requisite data involved conducting online interviews with members of the BA Advisory Council to gain further qualitative information from a number of booksellers. A total of 11 online interviews were carried out during August & September 2021 and the anecdotal evidence gathered from these indicated the following:

- Interviewees followed the tendency, which corresponds with the wider survey results, to be undertaking high levels of engagement with the top vitality & viability factors.
- Respondents had enacted a wide range of proactive responses to the pandemic and examples of these include the following:

Adjusting opening hours to reflect changing shopping habits
Becoming more involved with schools, teachers and children
Changing store layouts
Creating online customer events
Developing a delivery service, to include collection of essential items for customers, such as bread and milk
Enacting a local delivery service using bikes
Enacting click & collect
Establishing transactional websites
Expanding shop premises
Expanding the ability to stock speciality items
Following a deliberate strategy to communicate with customers via telephone as a more personal touch than online means
Gaining Pokémon Gym status to attract more customers
Hosting more events and activities outside the shop
Starting an Arts Alive programme for the town

- The interviewees demonstrated high levels of external engagement with their places, particularly with fellow businesses and examples of these include the following:

Acting as Chair of the local business association
Becoming involved with the local tourism group
Being a representative on the local chamber of commerce
Being involved with the local Business Improvement District
Forming positive links with local media outlets
Interacting with the local authority
Running the Totally Locally initiative in the town
Starting a local literary festival

- The general feeling was one of business rebounding strongly in recent months and almost all of those interviewed supported the outline hypothesis that this was largely due to the key factors of them offering a high degree of experiential retail, high levels of personal service and interaction and changing work patterns, meaning that a greater proportion of their immediate catchment population are more able to visit their local centres.

Conclusion

This study has found that booksellers are making a significant contribution to the vitality and viability of high streets. Not only do they contribute to the priorities which may have been expected such as retail offer, the merchandise, and diversity but many also contribute to the general appearance of towns, the collective marketing effort and the organisation and participation in events and festivals, as well as caring the little extra for certain groups of people such as the elderly.

Based on the results presented in the above sections, the study provided the foundation to create a working assessment of the characteristics generally demonstrated by booksellers and these are as follows:

- *Passionate & energetic*
- *Resourceful & adaptable*
- *Full of ideas and willing to try them*
- *Forward and outward looking*
- *Natural exemplars of best-practice*

The results also indicate that booksellers generally demonstrate a wide range of positive characteristics and behaviours that other retailers might be encouraged to adopt similar approaches within their towns and cities. With so many engaged booksellers, it is evident that there is high willingness and capacity to participate in the place management structures, with some already demonstrating excellent place leadership. There is therefore considered to be ample opportunity for this research to be included in policy making and place governance to help recovery and drive the change needed to revitalise centres across the UK and Ireland.

Recommended next steps

The project is considered to have highlighted a number of opportunities as possible next steps and these include the following:

1. Develop a communications plan to disseminate the positive results of the research via both the BA and IPM channels, as well as those of partner organisations and media outlets.
2. Produce a research article within an established academic journal.
3. Publicise the research findings via the High Streets Task Force.
4. Enact measures to propagate the positive behaviours exhibited by booksellers across the retail industry, likely to include liaison with bodies such as the British Retail Consortium and Independent Retailers Confederation.