

The High Street Report



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Sir John Timpson Introduction



Across the country, we have seen the changes facing our high streets and town centres due to the changing nature of retail. Town centres are evolving and retail will not return to the high streets that existed 10 or 20 years ago. A combination of internet shopping, the convenience of out of town retailing and an exceptional number of well-established retail formats reaching the end of their commercial life cycle, has led to a marked increase in empty shops and a decline in footfall. In completing this report I have more hope for the future of our town centres than when we first started gathering evidence.

Against the changing environment for traditional retail it is pleasing that some places have bucked the trend. By replanning their town centre space, inspirational local leaders, working in collaboration with all sections of their community have put a buzz back into their town centre, reducing the number of empty shops and increasing footfall. Quite simply: making the town centre a place people want to be.

The lesson that government should learn from these shining examples is that by helping local teams with a viable vision to put their own plan into action, real change can happen. Reimagining our town centres should not be seen as a central programme dictated by government. It is a series of locally inspired and led initiatives that are supported by a government that offers information and helps to clear obstacles out of the way. I think of it as 'Upside Down Government': providing help on a town by town basis, enabling local leaders to design future town centres that recreate a community hub.

In this report, we use the term 'town centre' rather than 'high street' because our recommendations are not just about shops and shopping. The town centre of the future should attract local people to take part in a variety of activities - including dining, leisure and sport, culture and the arts, entertainment, medical services, and many more uses. They should also contain business premises, offices, residential including affordable housing. We have more shops than we need and are short of housing in many parts of the country. It seems to us obvious that part of the retail estate should be converted into residential property where there is housing shortage.

Our evidence indicates the major obstacles that prevent local communities from reshaping their towns to provide spaces fit for the future are as follows: planning issues, a shortage of specialist expertise in space design and the lack of inspirational and forward-looking local leadership.

Local initiative is an essential ingredient for success. This report won't offer places a standard off-the-shelf process because a one-size-fits-all solution will not work. Local teams, which may comprise of local government, businesses and community groups, in each town must discover a culture and central purpose that unites their community and attracts them to the town's central hub. We have found that each successful town has its own brand and understands its unique selling point.

As life becomes more dominated by digital technology, there is an increasing need to encourage social interaction. Face-to-face communication has an important part to play in wellbeing, by establishing the strong attachment with others that are a critical part of making us human.

My interim recommendations were shared with government in the autumn, ahead of the autumn Budget 2018. Those interim recommendations suggested support for local leadership through access to advice, information and training as well as the provision of capital funding to help places overcome the difficult structural issues and changes facing their town centres.

We were pleased that the Chancellor accepted these recommendations and that Budget 2018 created a £675m Fund for an Action Plan for our high streets and town centres. This plan includes funding to help places to adapt and evolve for the future. It also includes funding to set up a Task Force to support local leaders in their efforts to improve their local places.

Our final recommendations provide further advice on how to make the most of that funding, but I will continue to stress the importance of empowering local places: the 'Upside Down Government' approach. I believe the best answers will be found by encouraging and trusting local initiatives. The message to local leaders is 'you can do it - we are here to help'. Some may fail but many more will create the town centres we need in 20 years' time.

Expert Panel

Executive Summary

The Expert Panel was set up at the request of High Streets Minister Jake Berry MP in July 2018. The panel were asked to diagnose the issues facing our high streets and town centres. They were then asked to advise on the best practical measures that central government can take to help.

Panel members were chosen as they have a range of practical and diverse experience. This reflects the fact that our high streets and town centres cover a wide range of sectors, organisations and communities. Chaired by Sir John Timpson, who brings over 50 years of retail experience to the panel as owner of Timpson, the panel includes representatives from the retail, local government, design, property and community sectors.

In preparing their report, the panel worked closely with MHCLG. Sir John also chaired a meeting of the Future High Streets Forum to ensure that their views were considered.

Working with the Institute of Place Management and MHCLG the panel have held a series of six evidence sessions. These have taken place in a range of locations and town types, spread across the country.

In these sessions we were keen to find out what works for local places in improving their high streets and town centres and, perhaps more importantly, what barriers they face in helping their local areas.

Sessions were held in Holmfirth, Shrewsbury, Bristol and Altrincham to learn the lessons from their experiences. The sessions covered the work already done and the work planned to make each town centre better.

As well as those that have already succeeded in achieving positive change in their town centres, we also arranged an additional session in Aldershot, a town that has faced a challenging retail environment since the financial crisis but is working to improve and adapt its town centre and is earlier in the process of delivering positive change.

The evidence gathering also included visiting the Teenage Market in Bolton. The research team interviewed the co-founder (who was 19 when he organised the first market) and 10 young stallholders. The teenage market participants were asked a different set of questions, to gauge their views on their high streets and town centres in general.

In addition to these sessions we commissioned a representative survey, asking people what they wanted from their high streets and town centres of the future.

This evidence was used by the panel to inform their recommendations. The panel also drew on their own experiences and on existing evidence. This included submissions to the HCLG Select Committee Inquiry into High Streets and Town Centres in 2030 and Bill Grimsey's reviews of high streets and town centres.

Recommendations

Our recommendations cover three areas; the High Streets Task Force, the Future High Streets Fund and short term measures to help high streets and town centres.

In our view, the Task Force should:

1. Be a single voice for town centres
2. Provide places with access to the data to help them improve their town centres
3. Facilitate cross-sector networking and skills building
4. Share information and best practice stories
5. Provide access to expert help and support
6. Help to enable local 'champions' in driving forward their plans
7. Help to streamline the planning process.

We believe that the Future High Streets Fund should:

- Co-fund with other sectors
- Interact with the Task Force to increase the impact of both
- Go to places that show a clear vision for their town centre
- Fund places with community involvement in their town centre
- Fund towns that demonstrate cross-sector leadership or intent to develop this
- Show a commitment to collaboration and partnership working.

In addition, we also have further short-term recommendations:

- Towns should improve housekeeping of their high streets and town centres. This should include a 'National High Street Perfect Day' – one day in the year when every shopping street looks the best it possibly can.
- Local authorities should use their initiative to encourage landlords and tenants to think innovatively about how to use empty properties.
- Places should ensure that their parking restrictions and charges are not driving people out of their town centres.

1. High Streets Task Force

We believe that local places are best placed to know what their local solutions are. No two towns are alike, and each has a unique culture and heritage. It should be up to the local community to come up with their proposed solutions. Successful change is created by local communities who have a vision for their high street and town centre. This is usually driven by inspirational local leaders.

We welcome the creation of the Task Force, as set out in Sir John's interim recommendations. We believe that there are a number of key roles for the Task Force and set these out below. We were impressed by the work already done by Scotland's Town Partnership, The Institute of Place Management and the latest report produced by Bill Grimsey. These are examples that the Department should examine before setting up the Task Force.

Creating a single voice for town centres

Issues facing high streets and town centres cut across an increasing range of sectors. The Task Force should provide cross sector support to encourage collaborative place-making. Support and training is often provided in sector silos. The Task Force should bring together local authorities, business leaders, community leaders and other voluntary sector organisations and embed this collaboration in its processes and aims.

We have seen on the ground that there is a lot of good work going on, but existing programmes are not well connected. We believe that the Task Force has a role in mapping and connecting existing work on high streets and town centres.

We also see one of the roles of the Task Force as being to represent town centres and feedback blockages and information to central government.

The Task Force should become well established as the go to place for best practice and innovative examples related to revitalising towns. It should be a route through which to build the capacity of local areas for active, collaborative place-making to improve.

Sharing data

The Task Force should set out a package of data protocols for places to use to assess their performance, the impact of their solutions and compare to other similar places.

Places need to be able to define 'what good looks like' for their projects, including those in the Future High Streets Fund. We suggest this could be a mixture of satisfaction scores (for residents and business) and hard economic KPIs (e.g. footfall and vacancy rates for retail). It is possible that each town place may wish to assess progress in their own way but there should be an aspiration to create some common measures that every project measures to enable comparison between towns.

But we don't want to drown business, community and civic entrepreneurs with too much data. We want to get the right data, to the right people, in a way they can understand and for them to have the right skills to be able to use it.

Facilitating networks and building skills

One of the most important types of support that the Task Force could provide is peer to peer support. The Task Force should ensure that they link local areas together where one wants to learn from the other.

The Task Force must help local leaders develop skills and capacity, alongside people who have different and complementary experience and skills, as well as those in similar roles and positions. This includes people from different sectors and different types of organisation. It could also support local councils with how to engage and build a collaborative vision with community organisations and entrepreneurs.

We believe that one of the best ways to improve and inspire local leadership is through bringing them together. By bringing together inspirational leaders, with other members of their development team, at a symposium, where they are giving plenty to think about by a number of experts, the discussion that could stretch late into each evening is the way to spread the best ideas nationwide.

Sharing information and stories

The Task Force must build an information bank to save local Town Centre teams the trouble of looking for facts that already exist. There is already a range of information on high streets and town centres, but it exists in different places. We see the Task Force curating this, so that places have access to the right information and know how to use it.

We believe there could be a real benefit in building a repository of success stories, describing how teams have turned their town centre around. There is of course no one-size-fit-all solution, but a variety of stories and case studies can provide inspiration for town centre managers searching for the best solution for their centre.

The Great British High Street Awards highlight some of these successful town centre stories, but even more could be done to help places learn from each other and share best practice. Highlighting best practice and positive examples for others to learn from should be a key part of the Task Force's role.

Expert help

There is a clear need to increase skills in economic development in local councils. This could include upskilling on town centre leadership and property management, procurement and development. One of the biggest gaps in most local towns is the expertise in professional space planning, good communications and ways to keep the project deliverable.

The High Streets Task Force should build a list of independent and multi-disciplined experts who have already helped towns put their ambitions into practice. These experts will support experimentation and help develop collaborative projects that are focused on transformational change.

Planning

Planning provides key tools to enable local communities to shape and deliver their high streets agenda which when used wisely can bring great benefit. The Task Force should encourage action that can make planning decisions simpler, quicker and more aligned to local strategies.

We welcome the announcements at Budget of two consultations in respect of planning for town centres. However, we think there is more to do which is why we recommend that the Task Force plays a role in boosting local authority capacity to enable planning to support local areas and stakeholders to design effective and innovative high street and town centre strategies.

Town Centre Champions

The central issue of producing change locally will be to find a town centre champion who has the leadership qualities and passion to be evangelical about creating a new vision for their town. It is for government to support these individuals, through the Task Force, but ultimately the success of a community needs local drive.

We must give each place the maximum chance of finding this local champion. In the first instance, the local council, chambers of commerce, Local Enterprise Partnership, Business Improvement District, and community groups (as applicable) should agree on one person who has the personality, the capacity, and local engagement to lead their collective efforts. They should also be able to convene and enable a spectrum of local leaders to work collaboratively towards a shared vision for their town.

This is not, primarily, a project about spending money. If it does cost money then it should be locally funded. It is essentially about the local areas finding and helping great people and in building local capacity. These place-making partnerships must have the capacity and stature to deliver what is needed now and to respond to future demands as they arise.

2. Future High Streets Fund

We have seen in our evidence sessions, across the country, that local authorities do not have the resources to produce and finance a professional comprehensive plan that would achieve a step change and future-proof their town centres.

That is why, in his interim recommendations to the Chancellor, Sir John suggested the provision of funding to support those places with a viable vision for their high streets and town centres.

In the Budget on 29 October 2018, the Chancellor announced a £675 million Future High Street Fund to help Town Centres plan better spaces for their communities.

Type of areas the Fund should fund

Alongside strong local leadership, developed and facilitated by the Task Force, many high streets and town centres need to be restructured for the future. There should not be a 'one size fits all' list of characteristics in places to fund, as each town has an individual requirement.

The types of things that the fund should fund encompasses a number of factors. These could include helping places to improve space management and transport links.

Adapting for the future also includes engaging with communities and giving local people, groups and businesses the agency to play an active role in shaping their local places. This can help ensure proposals meet their future needs and changing uses to ensure appropriate local balances between different uses to meet these needs.

Co-funding

We believe that the money should be provided on a shared funding basis. Good schemes should create considerable interest from prospective commercial partners and mobilise local assets across sectors. This co-funding could either be from public or private finance.

Interaction between the Fund and Task Force

We would expect places bidding for the Fund to be advised and encouraged by the Task Force. Money from the Fund needs to go to the places with the best projects, not the best at bidding, and support from the Task Force in navigating the bidding process will help this.

The Task Force should play an important role in both enabling and evaluating partnerships bidding for and delivering projects through the Future High Streets Fund. Members of the Task Force could act as critical friends to the local project teams. This can help them to develop clear strategies that unearth and mobilise local assets and that engage with, support and thrive on local people, organisations, businesses and networks.

The Task Force also has a role in spreading the learning of the Fund. While the Fund will not reach every high street or town centre, by disseminating good practice and advice we should be able to help all of them.

Key Points

We believe that there are a number of criteria that should be satisfied by communities that are bidding for funding. These include:

1. Vision - There needs to be the local capacity and vision to be able to change the situation. This is also needed to sustain these impacts in the long term, beyond the lifetime of the project bidden for.
2. Community involvement – Bids should demonstrate the involvement of the wider community in articulating a shared vision, particularly those of young people. This includes shifting away from a culture of getting local community buy-in for placemaking, (in which local residents are seen and treated as commentators) to empowering local people, organisations, businesses, and institutions to be active contributors and partners.
3. Inspirational leadership – Projects need the drive from cross-sector leadership to make positive change and recognition to involve the wider community to do so. If this leadership is not already in place, there should be a clear intent to develop it for them to receive funding. This leadership must be accountable for the timely delivery of these projects.

3. Further Recommendations – Short Term Solutions

The majority of our recommendations look far into the future. Even nimble local leaders, with the support of Councillors and their local community, could take years to make the sort of step change that will make a real difference. It will be some time before some places are able to adjust to the challenges facing town centres.

There are, however, some things that can be done to immediately, to improve even the fastest declining places.

Housekeeping

Everyone can improve high street and town centre housekeeping through a determined campaign to eliminate litter and graffiti. Our suggestion is to have a 'National High Street Perfect Day' - one day in the year when every shopping street looks the best it possibly can. This should be a locally led and funded initiative that draws on expertise from a range of partners.

Many chain retailers do this, especially as they approach their peak season. Here the idea can be broadened to more aspects of the town centre and be hugely inclusive of the local community, such as local schools, faith groups and voluntary organisations, and a source of civic pride.

Empty Shops

Empty shops can be depressing eyesores that drag down shopping areas. It can be hard for local stakeholders to know who owns these properties, and we would like to see further detail on the announcement at Budget 2018 to pilot a register of empty properties in selected local authorities.

Local authorities should use their initiative to encourage landlords and tenants to think innovatively about how to use empty properties. If a deal can't be struck at the market rent, special terms should be offered to community businesses or other traders with social purpose. The announcement to pilot an "Open Doors" brokerage approach matching landlords of empty properties with community groups looking for space was welcome, and we would like to see this go further across the country and sustained over time. The Task Force could disseminate best practice and learning from the pilot.

Parking

While gathering evidence, it became clear that parking is an important factor taken into account when people decide where to shop. In the short term local authorities should review their parking provision to make sure that existing restrictions and charges are working to support accessibility to local businesses, encouraging footfall and attracting customers to town centres and high streets.

Annex A : Panel Members

Sir John Timpson (Chair): Chairman of Timpson, the UK retail service chain with over 2,000 shops.

Vidhya Alakeson – CEO, Power to Change, the independent trust dedicated to supporting community businesses to create better places across England. Vidhya was formerly Deputy CEO at the independent think-tank, the Resolution Foundation.

Gi Fernando MBE, Founder & CEO, Freeformers. Gi is an engineer, social impact entrepreneur and investor, who founded Freeformers in 2012. Freeformers is a workforce technology and transformation company.

Councillor Graham Galpin (Cons) from Ashford council. Graham has been a Councillor in Ashford since 2011 and a Cabinet member since 2013. He has had responsibility for the town centre's economic vitality for almost all of that time.

Emma Mackenzie, Director, NewRiver. NewRiver is a property investor, asset manager and developer specialising in the UK retail and leisure sector. Emma is a member of the Executive Committee sits on the NewRiver REIT (UK) Limited Board and is principally responsible for NewRiver's Scotland and Northern Ireland Portfolio which includes acquisition, asset management, development and disposal.

Eric Reynolds – Founding Director of Urban Space Management. Eric established and ran some of the most significant regeneration projects in London since the early 1970's including Camden Lock Market, Merton Abbey Mills, Spitalfields Market, Gabriels' Wharf, Bishopsgate Goodsynd and Trinity Buoy Wharf. He won the Regeneration & Renewal "Lifetime Achievement Award" for Regeneration in 2012.

Stephen Robertson. Stephen has spent most of his working life in retailing, including roles at B&Q and Screwfix, before becoming Director General of the British Retail Consortium. He is now a non-executive director of a number of companies including Hargreaves Lansdown plc. and Timpson Group.

Sophia de Sousa – CEO, The Glass-House. Sophia is Chief Executive at The Glass-House Community Led Design, a national charity that supports communities, organisations and networks to work collaboratively on the design of buildings, open spaces, homes and neighbourhoods.

Annex B: High Street Survey Results

The Ministry of Housing, Communities and Local Government on behalf of the Expert Panel, commissioned an external market research company to gauge public opinion about their high streets and Town Centres. This was used to supplement the work of the Institute of Place Managements which ran regional evidence workshops (see Annex D for more detail).

The short questionnaire was administered as part of the Walnut Unlimited Omnibus quantitative survey, which is conducted twice a week interviewing a nationally representative sample of 2,000 GB adults aged 18 years and over.

To ensure the survey capture views of young people (those aged 18-24 years) a booster sample targeted this specific age group. The survey ran from 21-30 September 2018.

The survey showed that over half (53%) respondents visited their high street once a week, with 13% young people visiting on a daily basis. Of young people 69% were very satisfied with their high street compared to 55% of those aged 75 and over.

Young people of a non-white ethnic group were more likely to visit their high street daily, 24% for Black British compared to 12% for White.

Respondents cited a good variety of shop as the most important feature of their high street. Unsurprisingly, people believed reducing the number of empty shops, better parking and a better mix of shops would improve their high streets.

Respondents were asked how important having residential areas within walking distance of town centres and high streets was. Overall 64% of respondents felt this was important. There was a clear regional disparity, with those in North East and East Midlands less keen on having housing on the high street compared to those in South East.

Over 70% of respondents agreed that – 'A safe and welcoming high street and town centre will enable and empower children and young people to use it more'.

Annex C: High Street Survey Questions

We would now like to ask you about your experiences of using your high street or town/city centre. When answering these questions, please think about the high street or town/city centre you use the most. This may not be the one that is closest to where you live.

For the purpose of these questions, a high street or town/city centre is defined as a street, row or area that is predominantly made up of retail establishments, banks, restaurants, cafes, bars and other businesses and public services.

ASK ALL

Q1. Thinking about the high street or town/city centre you visit the most, on average, how often do you visit?

1. Daily
2. 2-3 times a week
3. Once a week
4. 2-3 times a month
5. Once a month
6. Less often than monthly
7. Never
8. Don't know

ASK ALL WHO CODE 4, 5, 6, 7 AT Q1

Q2. What prevents you from visiting your high street or town/city centre more often? Please list up to three factors.

3 OPEN-ENDED BOXES

ASK ALL WHO CODE 1, 2, 3 at Q1

Q3. What encourages you to visit your high street or town centre regularly? Please list up to three factors

3 OPEN ENDED BOXES

ASK ALL EXCEPT THOSE THAT CODE 7 IN Q1

Q4. How satisfied or dissatisfied, if at all, are you with the high street or town/city centre you visit the most?

1. Very dissatisfied
2. Quite dissatisfied
3. Neither satisfied nor dissatisfied
4. Quite satisfied
5. Very satisfied
6. Don't know

ASK ALL EXCEPT CODE 6 AT Q4

Q4a. You said that you are {insert answer from Q4}. Why do you say that?

OPEN-END

ASK ALL EXCEPT THOSE THAT CODE 7 IN Q1 RANDOMISE LIST

Q5. Please rank the **three** most important things to you from the list below for your high street or town/city centre to have.

1. The shops and services are open when I need them
2. It is clean and attractive
3. A good variety of shops
4. The public services I need are there
5. The shops sell the products I need
6. Sufficient car parking
7. Sufficient facilities such as toilets, benches etc.
8. Everything I need is within walking distance of each other
9. Accessible for those with impaired mobility or with a pram/pushchair
10. Good variety of leisure and entertainment facilities
11. Attractive to visitors as well as locals
12. The shop fronts are well-maintained
13. Range of events to attend such as markets, festivals, carnivals etc.
14. Good recreational space
15. Feeling of safety
16. A good place to live
17. People from different backgrounds can meet and mix
18. None of the above
19. Don't know

ASK ALL EXCEPT CODE 7 AT Q1 RANDOMISE LIST

Q6. From the list below, please rank the top three things that you feel could be improved for your high street or town/city centre?

- a) Better community spaces for people to mix/meet
- b) Better green spaces
- c) A greater variety of shops
- d) More restaurants
- e) Fewer empty/boarded up shops
- f) Public services hubs, e.g. council services
- g) More GP services/Health care services
- h) Free from cars
- i) Better transport links
- j) Regular bus services
- k) Better parking facilities
- l) More residential areas (e.g houses and flats to live in)
- m) Other (please specify)
- n) Nothing
- o) Don't know

ASK ALL RANDOMISE LIST

Q7. We'd now like you to imagine that you are a town planner, involved in planning the facilities and services for a new high street or town/city centre. Which of the following would be most important to you to include in the plans? Please rank your top 5.

- a) GP surgery
- b) Library
- c) Dentist
- d) Health care centre
- e) Post office
- f) Leisure facilities (e.g gym, swimming pools)
- g) Grocery store/ supermarket
- h) Bars/pubs
- i) Restaurants/cafes
- j) Cinema
- k) Bank
- l) Pharmacy
- m) Clothes shops
- n) Newsagent
- o) Barbers/hairdressers/ beauty salon
- p) Book store
- q) Coffee shop
- r) Department store
- s) Electronic goods store
- t) Food takeaways
- u) Music/movies/video games store
- v) Charity shops
- w) Travel agent
- x) Off licence
- y) Launderette/dry cleaners
- z) Estate agent
- aa) Petrol station
- bb) Bookmakers
- cc) Community centre
- dd) Council services
- ee) Housing
- ff) Green space
- gg) Public toilets
- hh) Parking
- ii) Excellent phone signal and wifi hotspot availability
- jj) Free from cars
- kk) Other (please specify)
- ll) Don't know

ASK ALL

Q8. How important is it to you that a high street or town/city centre has residential areas within walking distance?

1. Not at all important
2. Not very important
3. Quite important
4. Very important
5. Don't know

ASK ALL RANDOMISE STATEMENTS

Q9. Please rate to what extent you agree or disagree with the following statements?

1. The community and voluntary sector should play an active role in the design and delivery of the high street.
2. Young people should have a greater say on the future of their high street and town centre
3. A safe and welcoming high street and town centre will enable and empower children and young people to use it more
 - Strongly agree
 - Tend to agree
 - Neither agree nor disagree
 - Tend to disagree
 - Strongly disagree
 - Don't know

ASK ALL

Q10. Please indicate which of the following you live in?

1. Village
2. Small town
3. Big town
4. Small city
5. Large city
6. Other (please specify)

DEMOGRAPHIC QUESTIONS TO BE ASKED (included as standard, except for disability)

SD1 - Gender: Are you?

- Male
- Female
- Other
- Prefer not to say?

SD2 - Please indicate your age...

- 16-24
- 25-34
- 35-44
- 45-54
- 65-75
- 75 and over

SD3 - What is your ethnic group?

- White
- Mixed/multiple ethnic groups
- Asian/Asian British
- Black African/Caribbean/Black British
- Other ethnic group

SD4 - Do you have a longstanding physical or mental condition or disability that has lasted or is likely to last 12 months and which has a substantial adverse effect on your ability to carry out day-to-day activities?

- Yes – a mental condition
- Yes – a physical condition
- Yes – other
- No
- Prefer not to say

SD5 - Which region of the UK do you live in?

- a) North East
- b) North West
- c) Yorkshire and the Humber
- d) East Midlands
- e) West Midlands
- f) East of England
- g) London
- h) South East
- i) South West
- j) Scotland
- k) Wales

