UNIVERSITY OF Southampton

E·S·R·C ECONOMIC & SOCIAL RESEARCH COUNCIL

Evolving High Streets: Resilience & Reinvention

Perspectives from Social Science

Editors: Neil Wrigley & Erin Brookes

Preface

I have been involved in planning and retail development throughout my professional career. All too frequently I have found that opinion-formers' attitudes to new development, and particularly its effects, are founded on populism rather than sound analysis of the facts. Similarly, and more worryingly, policy makers' and decision takers' approach to new development is, all too often, based not on careful and objective consideration of sound evidence but on wild, frequently unsubstantiated, assertions.

It is always pleasing to come across proper objective research that examines how retail trends are affecting existing retail structures.

The following collection of papers provides a wide-ranging and thought provoking collection of essays on the challenge currently facing our high streets and town centres in the digital age.

Leigh Sparks and Anne Findlay's paper on high streets and town centre policy echoed my own view that land use planning policy has, for many years, found it hard to regulate the effect of retail trends – a challenge that is now being compounded by online retailing. Their paper on secondary centres then examines the rejuvenation many of these centres are now witnessing, and how many have proved more resilient than some larger centres during the economic downturn and, indeed, may be less exposed to the impact of internet retailing or globalisation than many larger towns, city centres, or regional shopping malls.

One of the most obvious changes in these secondary centres has, of course, been the rapid growth of convenience stores. Neil Wrigley and Dionysia Lambiri's paper documents the factors driving this change and how convenience culture is not just reshaping the geography of grocery retailing but also our high streets more generally.

Marion Roberts' paper on the night-time economy provides a fascinating insight into the role of night-time economy in town centres and its reliance on activities that quite simply cannot be provided by online or digital technologies. It explores how this now extends well beyond bars, clubs and alcohol-related activities (and the problems these have sometimes caused in terms of binge drinking, the decline of traditional pubs, and alienation

of wider demographic groups) to the growth in the restaurant sector based on rising consumer expectations and disposable income. It also highlights the challenge policy makers face now in recognising the diversity of activities (and different demographic groups) involved in the night-time economy and reconciling this with aspirations to encourage town centre living; a tension that confronts long-held attitudes towards 'zoning' of uses.

Andres Coco-Stefaniak and Shanaaz Carroll's paper on managing town centres recognises the need for improved management of our town centres but highlights the uncertainty about its scope and future direction. It points to the lessons that might be learnt from elsewhere in Europe and how there needs to be a more visionary approach towards future management that promotes the physical diversity of centres alongside their digital credentials.

The remaining three papers then examine the challenge centres face in the digital age. Jesse Weltevreden's paper provides some interesting insights from The Netherlands and the chronology of Internet usage which is clearly applicable to the UK experience. Cathy Hart's paper provides a fascinating insight into research being undertaken into the factors that influence consumer behaviour in our town centres and the interactions or touchpoints that occur. Alex Singleton and Les Dolega's paper seeks to measure the e-resilience of our existing centres in a digital age – examining how it is no longer the location and physical attributes of existing centres and their catchment demographics that determine their success, but also the potential online shopping behaviour of consumers and how they might inform our understanding of how such centres may be resilient to future change.

Finally, my colleague Serena Page's paper examines the continuing shortcomings of existing data sources on retailing. Her paper provides an explanation for how the dearth of publically available data about retailing and its effects has led to a dependence on factoids, wild assumptions, and assertions in media coverage and policy formulation that I talked of earlier.

Huw Williams, Director, CgMs Ltd, London

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Postscript

Evolving high streets: in what ways can social science research add value?

Neil Wrigley

During 2014 Britain slowly emerged from the long years of crisis and austerity which had followed the global financial meltdown of 2007. In the context of the challenges faced by Britain's town centres and high streets however, the need to draw lessons from that experience and to use those insights to design and implement appropriate policy responses had become more, rather than less, important. As Government ministers had consistently observed, high streets needed to adapt in order to survive, and it was not in anyone's interests to attempt to preserve a historic stereotype of the high street dominated by traditional trades. Rather, policy should be focused on facilitating the creation of spaces which would have future value for local economies and communities. In particular, town centres and high streets which struck new balances between traditional retail, services, housing, community and social uses, entertainment and cultural activities.

In this volume we bring together the views of a dozen academics who have reflected on these issues. Our brief to them was to write 'opinion', or what might also be termed 'thought leadership', pieces which structured, interpreted, extended, added value, and possibly redefined existing debates on these issues.

As we acknowledge immediately, this is no small task for at least three reasons:

- Firstly, because Britain's town centres and high streets arouse strong feelings. Maintaining their economic health and vitality is viewed as a priority by a large majority of consumers – even by those whose shifting shopping habits are at variance with those objectives.
- Secondly, because town centres and high streets are commercial and community spaces of considerable and deceptive complexity – urban ecosystems with myriad capacities to adjust to change. As a result, identifying and understanding the likely evolutionary paths of those spaces is difficult. Indeed, moving beyond the short term into reimagining the high streets of the future often produces scenario forecasts which are interesting and creative but which become embarrassingly detached from on-the-ground reconfigurations in a very short period of time.
- Thirdly, because geography matters. Britain's regional and local economies were in markedly different states of economic health when the shockwave of a global financial crisis hit, reflecting long-term structural imbalances between regional economies, and strong differentiation (e.g between metropolitan cores and peripheries) within individual regions themselves. That differentiation was, in turn, actively being compounded by geographical variation in levels of both inward migration and shifting age composition – as Britain's population became more ethnically diverse, its average age increased, and the proportions in its older age segments expanded rapidly.

Taking due account of these complexities, however, the value of a considered academic perspective becomes more, rather than less, important. Likewise the freedom which academics enjoy to explore structures, interpretations, and positions which sometimes get closed to equivalent experts in industry and government is vital.

The opinion pieces in this volume are offered in that spirit. Each explores a different dimension of a largely shared interpretation of Britain's high street crisis and of the forces of change which in combination have been reshaping the commercial and community spaces which constitute those town centres and high streets.

In consequence, this introduction begins with a brief outline of that shared interpretation of the high street crisis – considering the shockwave of global financial crisis, the forces of change (or slow burns) which it exposed, policy responses from government and stakeholders, and so on. It then moves on to ask

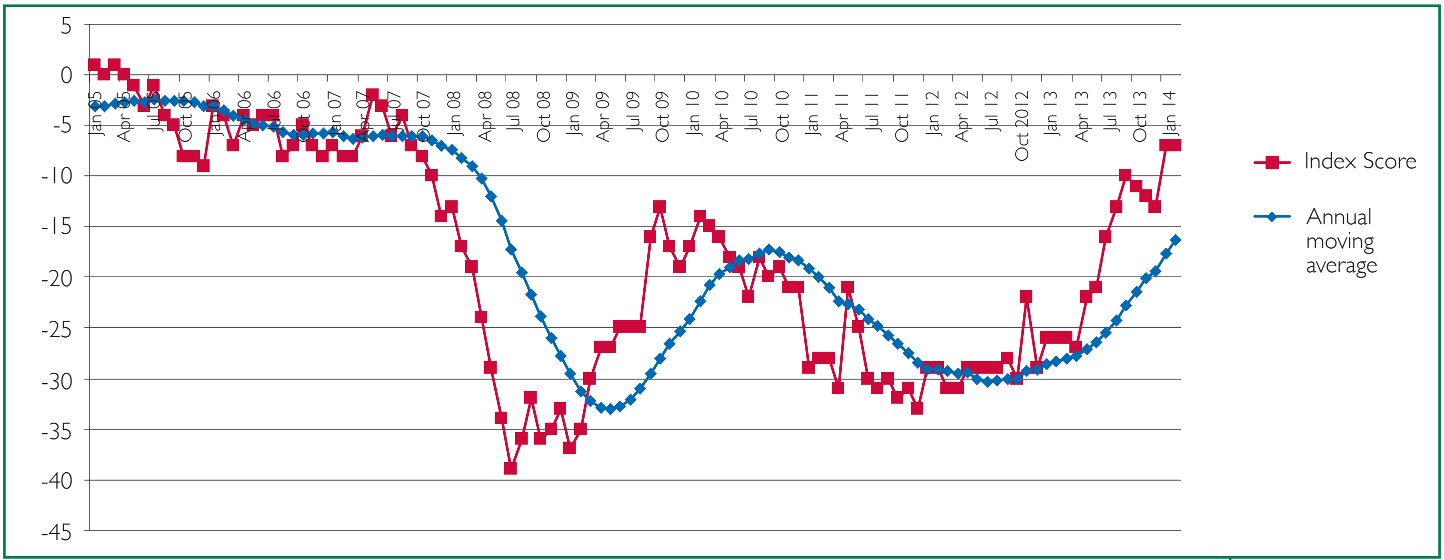


Figure 1. Illustrating impact of economic shockwave and subsequent austerity on UK consumer confidence

Source. GfK NOP Consumer Confidence

what sorts of contribution might social science research be able to bring to the table – placing emphasis equally on the analytical and the conceptual. In particular, and consistent with the emerging view of many expert groups on the likely evolution of Britain's town centres and high streets, it suggests the attraction of 'bounce forward' rather than 'bounce back' conceptualisations, specifically an *adaptively resilient* view of high street evolution – noting that it is a conceptualisation increasingly consistent with empirical evidence which indicates that: "far from being dead, the high street appears to be showing great resilience and a capacity for re-invention" (Deloitte, April 2014).

Finally the introduction positions the set of opinion pieces which follow within the context of the work of the government policy advisory group the Future High Streets Forum and the review of the evidence on high street performance and evolution co-commissioned from the University of Southampton by the Future High Streets Forum and the Economic and Social Research Council (ESRC). It notes that while there are important roles for both evidence review and opinion pieces, particular responsibilities fall to the authors of opinion pieces who must push the boundaries of current debates, prioritise the novel, and add value by challenging too easily accepted concepts and the sort of factoids which have traditionally blighted discussion of these emotive issues.

Context

The shock-wave of global financial crisis tore through UK town centres and high streets in 2008 with dramatic effect. Consumer confidence collapsed and remained stubbornly negative for the next five years (Fig 1) – being mirrored by sharp falls in GDP (Fig 2). Together with stagnating family incomes and unsustainably high costs of doing business, fragile consumer confidence helped push many retailers into administration, and some into liquidation. Nearly 75,000 employees were affected by 54 major retailer failures in 2008, and there were secondary peaks in administrations/liquidations in 2009 and 2012.

Town centres and high streets provided highly visible and graphic evidence of the scale of the economic downturn. The crash in consumer confidence was followed by an immediate and abrupt increase in vacancies. Vacancy (see Fig 3) measured as either a percentage of floorspace in a centre or in terms of the percentage of empty property units (voids) more than doubled over the five years from 2008 – in the case of voids rising from 7% in 2008 to a peak of 16.3% in 2012, before trending downwards as the economy began to recover, falling to 15.1% by Oct 2013, and again to 13% by April 2014.

Significantly, the shockwave also exposed and reinforced longer-term underlying forces of change (see Fig 4) which had been reconfiguring UK town centres and high streets for some time, but which had been somewhat masked during the growth years of the early/mid 2000s. Not all those forces, it must be stressed, were negative for the high street. The period of turmoil offered new opportunities for those businesses which could change and adapt.

Of particular importance amongst those structural forces were:

- The progressive rise of online shopping – which by common consensus had increased to 10% of UK retail sales and was beginning to have marked substitution and modification effects on both consumer behaviour and certain types of high street retail. With Amazon poised to become the country's eighth largest retailer, the privately expressed but widely held view amongst the leading UK retailers was that online sales were likely to approach 30% by 2020.

- The long-term and cumulative impacts of competition from out-of-town one-stop retail development. Those impacts however, and despite the differential ease of car-based shopping trips offered by out-of-town retail, were becoming increasingly complex and difficult to read. Not least, this resulted from the switch of policy to tightening retail planning regulation which had begun in the mid 1990s, and the subsequent consequences of more than a decade of wide-ranging support for a 'town centres first' approach to retail development.
- The progressive, highly complex, and often underestimated shifts in consumer behaviour and cultures of consumption towards what has been referred to as 'convenience culture'. Consumers were seen to be not only rapidly embracing online shopping, but also to be re-evaluating the costs versus benefits balance of one-stop out-of-centre facilities, and seeking convenience at the local/neighbourhood level. The latter was particularly the case if businesses could supply either a 'choice-edited' neighbourhood version of the range and quality of the out-of-town offer, or alternatively if they could provide something specialist and/or rooted in the local community. Since 2008 consumers were also seen to be adapting their behaviour (consciously or unconsciously) to economic crisis and austerity in a way that was supportive of a local/neighbourhood conception of convenience. For example, by their use of more frequent top-up shopping at a greater number of local stores to more appropriately balance their household demands against supply (i.e. employing what might be thought of as a crude form of 'just in time' supply technique) in the process also reducing their food waste and taking greater advantage of discount coupons etc. The cumulative effect, however, was to raise previously unimaginable doubts regarding the long term prospects of large-format out-of-town retail and service provision.

Policy responses

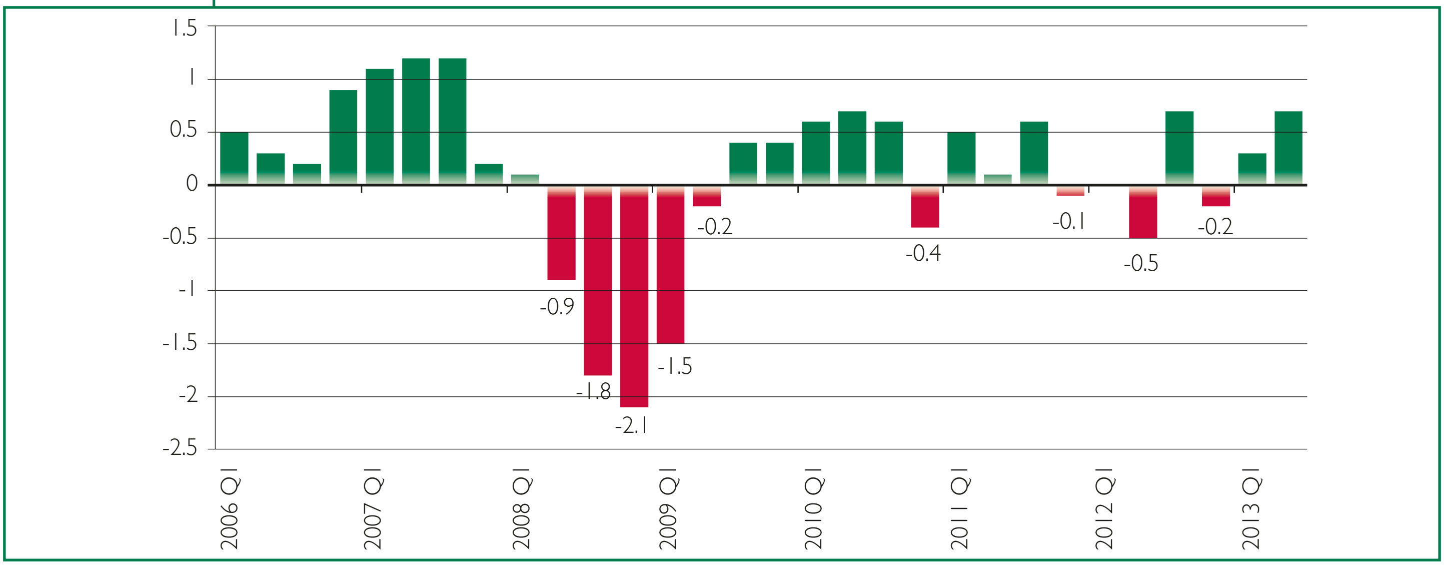
Clearly these forces were far from uniformly negative for the prospects of high street retail. However, during the initial years of austerity which followed the collapse of consumer confidence, and in combination with severe public expenditure cuts, falling family incomes, and the grim realities of no-growth Britain, they prompted a potent and anxiety-inducing mix of uncertainty. That mix, in turn, fed into, and off, growing public awareness of rising levels of concern within UK government about the economic health and prospects of town centres and high streets.

Faced with claims that high street footfall (excluding Central London) had fallen by 10% over three years; that town centre vacancy rates had doubled over two years; and with out-of-town retail's share of trade exceeding 50%, the government responded in May 2011 by announcing an independent review of the current state and future prospects of UK town centres/high streets led by TV's 'Queen of Shops' Mary Portas.

During her review, Portas expressed passionate views about the need to view the UK's town centres and high streets not just in commercial terms, but as dynamic, exciting, and social places that give a sense of belonging and trust to a community, and she took fiercely independent positions about what she viewed as the causes of their malaise. Her review was published in December 2011 and contained 28 recommendations

Figure 2. UK GDP % change 2006–2013

Source. ONS, 2013



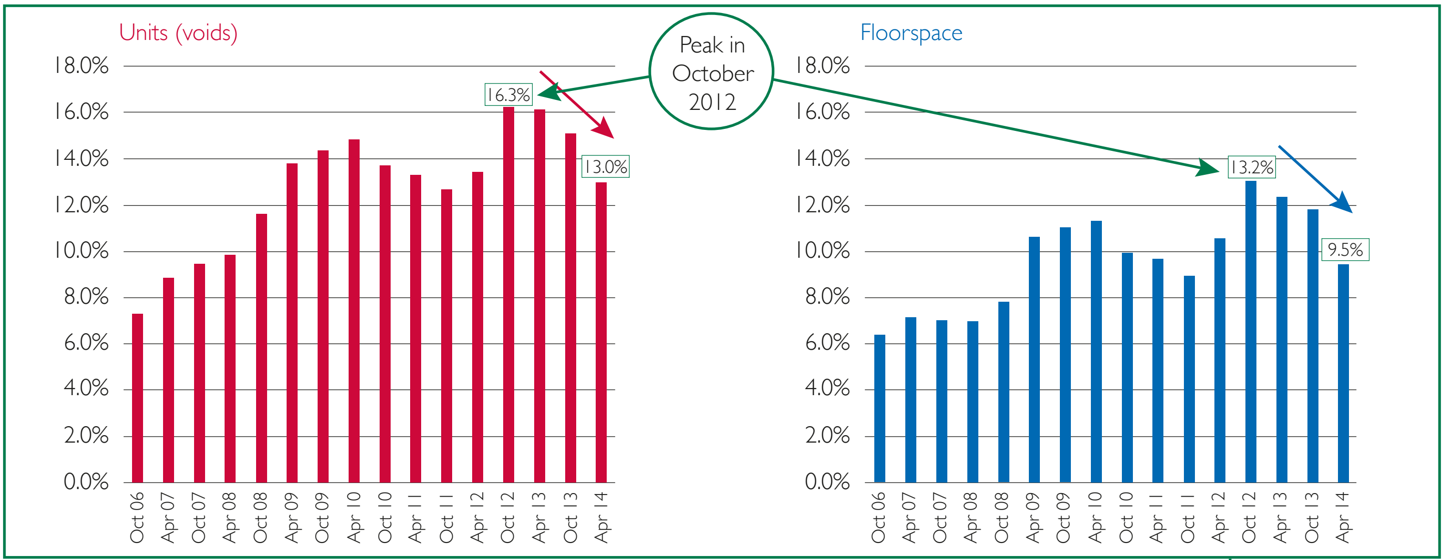


Figure 3. Retail vacancy rates defined in terms of units (voids) and floor space

Source. Colliers International

aimed at their revitalisation – including the establishment of what subsequently became known as Portas Pilots to test out alternative ways of boosting high street trade and vitality. In March 2012, the government formally accepted virtually all of the Portas recommendations. Indeed, it claimed to have gone much further offering 'a raft of new incentives, funding schemes and bureaucracy-busting measures, in a bid to rejuvenate the country's rundown high streets'. By July, and following a competition that attracted considerable interest, 27 Portas Pilots were in place with a brief to assess what ideas worked most successfully in turning around declining high streets. The Portas Pilots shared Government/Mayor of London funding of £2.7 million to try out new ideas for regeneration. Additionally, 330 Town Team Partners received smaller amounts of support.

In turn, the Portas Review spurred a plethora of high-profile investigations and reports from other stakeholders focused on the likely evolution of centres/high streets and on policy instruments which might be designed to protect and enhance their vitality. Although no simple consensus emerged from these reports, they ensured that the issues remained centre stage. Not least this resulted from the high quality and authoritative nature of some of the reports – in particular that of the Distressed Property Task Force (2013) which captured the views of many of the leading retail property companies, and, additionally, because one of the reports – the Grimsey Review (2013) lead by veteran retailer Bill Grimsey – positioned itself as a critique of and challenge to the Portas Review. Partly in response, in 2013 a heavyweight government policy advisory group – the Future High Streets Forum was created, co-chaired by a Minister from the Department for Communities and Local Government (DCLG) and a senior executive from Alliance Boots, and consisting of leaders in the retail, property, hospitality, leisure and services sectors. Under three successive Ministers, the Forum proved to be exceptionally proactive and interventionist, extracting significant financial concessions on the Business Rates burden, reining-in over-zealous parking enforcement practices, supporting local markets, easing certain land-use planning restrictions to facilitate change of use from retail to services and increase local footfall, working with DCLG to support the Portas Pilots and Town Teams, and launching a new competition to promote the vitality of the 'Great British High Street'.

What can social science research contribute?

There is widespread consensus that Portas provided an important catalyst for both investigation of, and policy debate on, topics which had been neglected for some time. So in that context, how can academic study in general and social science research in particular add value to policy debate and formulation on a topic so clearly prioritised by government? In response, I suggest there are four issues where very considerable value can be added:

1. *Providing analytical insight into the marked variation in performance of town centres/high streets as they adjusted to the shock-wave of economic crisis* – Why did some high streets brush aside the shock-wave and thrive whilst others slid into terminal decline? This vital task has been surprisingly under-explored So whilst there is consensus regarding a strong north-south divide in performance, contrasts between large and small centres/high streets, between those which are more strongly service-provider and less retail oriented and vice versa,

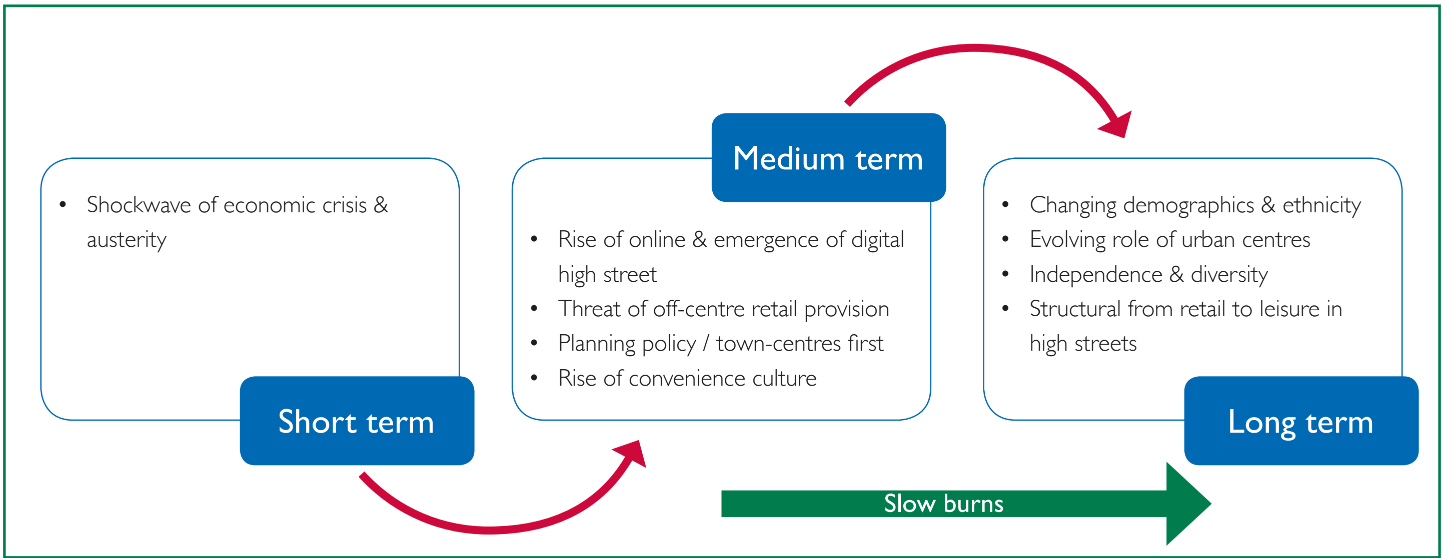


Figure 4.
Forces of Change

and between those which are more rather than less diverse in the sense of having small independent-retailer and service-provider dominated town-centre/high-street structures have attracted relatively little attention and/or inconsistent results. By extension, more subtle, but potentially policy-sensitive drivers such as local institutional structures supportive of the high street, the debilitating effects of high levels of long-term vacancy, or the emulation effects relating to what have been termed 'local heroes' (distinctive local retail/service providers with acknowledged regional/national and in some cases international reputations) have attracted almost no analytical study.

2. *Providing related insight into whether, and how, drivers of differential performance may have varied by scale and by position in the retail centre hierarchy* – Do the factors which offered the most protection at a regional or super-regional level remain the same at the scale of a single city or do new drivers come into play? And have the secondary retail centres – the local centres, parades of shops, and peripheral streets so often missed in commercial surveys, neglected in discussion, and possibly unsustainable – borne a differentially high degree of the pain of the economic shock-wave? Or, unloved and under-scrutinised, has the fragility or robustness of their performance been driven in different ways?
3. *Providing a conceptual framework which helps make sense of both those complex variations in performance, and of the longer-term evolving configurations of high streets* – In particular, what value can be added to understanding of the evolutionary trajectories of town centre/high street structures and their responses to the shock of economic crisis by concepts of the *resilience* of regional economic systems advocated by social scientists? Are high streets likely to bounce back and resume their pre-crisis trajectories (the *engineering* interpretation of resilience). Or will the strength of the shock and triggering of other forces of change, push the fragile ecologies of many high streets beyond a tipping point where they are unable to bounce back and must move to new configurations (the *ecological* interpretation). Alternatively, are high street reconfigurations best captured by an *adaptive resilience* interpretation which focuses on anticipatory and/or reactive reorganisation to cope with changing competitive dynamics following macroeconomic shock. And if the latter is the answer, how can that interpretation, which has its roots in complex systems theory, be used in a socio-economic context with sufficient sensitivity to enrich our understanding?
4. *Contributing theoretically-informed evidence-based insight to the development and implementation of policy* – Taking an *adaptive resilience* perspective for example implies accepting that high streets have always been dynamic and adaptive, have rarely evolved in smooth and incremental ways, and have constantly been reshaped by periodic economic and competitive shocks – i.e, that the morphing of the ubiquitous corn merchants of 19th Century high streets into the mobile phone shops of today should not be over-interpreted.

Taking that perspective implies, additionally, that policies focused on assisting high street revitalisation are likely to be most effective and efficient when they work with the grain of evolutionary trajectories which were becoming clear before the shock of economic crisis. As UK high streets emerge from crisis and austerity, it is unlikely that there will be a bounce back to earlier forms. Far more likely is the strengthening renewal of pre-crisis evolutionary trends (what some have termed 'bounce forward'). Accepting that then allows us to begin scoping out the nature of future *adaptively resilient* high streets. In particular, to suggest that their core is likely to involve complementarity (with online retail, emerging forms of consumer culture, shifts towards leisure services provision, etc), raised levels of quality and consumer service, and new forms of symbiotic relationship between small independent traders and corporate retail and service providers.

Positioning the volume and its contributions

Shortly after the formation of the Future High Streets Forum in 2013, its members divided into four working groups. Group 3 chaired by the Director General of the British Retail Consortium, was tasked with reviewing and mobilising the evidence base to underpin the work of the other groups.

The Evidence Review is scheduled to be published at the end of 2014. Alongside that evidence review, but clearly intertwined with it, is this separate volume of opinion pieces. The publications must be recognised as having very different purposes. The review to synthesise and assess available evidence, the opinion pieces to push the boundaries, to prioritise the novel, and to add value by challenging the too easily accepted concepts, and the sort of factoids which have traditionally blighted discussion of these emotive issues.

There is an important role for academic thought leadership on topics central to an understanding of Britain's evolving town centres and high streets in the 21st Century, The opinion pieces which follow make a start, but only a start, on that important task.

2 High streets and town centres policy

Anne Findlay and Leigh Sparks

Introduction

High streets and town centres are critically important to the retail sector, both in business terms and in the linking of retailing to a sense of place. There is however no industrial/economic policy towards the retail sector; retailing (unlike say agriculture or energy) is routinely ignored at a strategic and national level. Such policy that exists towards retailing is fundamentally land-use planning policy, overlain by national competition and business regulation policy. Retail space is controlled or allowed through the permissions for the sites that retailers occupy or desire to occupy, and once retailing is allowed then that's pretty much it, unless competition effects come into play. Conditions of development, limited changes of use, and permitted development rights all work at the level of the land-use site. As a consequence, there are limits to what planning can and cannot deliver, especially in the management and structure of high streets and town centres (unlike for example the situation within a managed shopping centre).

When retailing was a small shop, independently operated, high street focused sector this approach did not present too much of a problem. However from the late 1950s onwards retailing has changed dramatically; planning policy has been trying to catch up ever since. As retailing became multiple dominated, organisationally concentrated, and scale (at unit and corporate level) became more important, so pressures mounted, most notably in the desire for new out-of-town retail formats and operations. The era of the superstore, the retail warehouse park and the regional shopping centre raised substantial policy implications, both for land-use planning and for the towns and high streets affected by this new competition.

Over recent decades, policy has swithered between being more permissive towards out-of-town retail development and being more restrictive. Since the mid-1990s the policy – encapsulated as Town Centre First (see Table 1) – has been supposedly restrictive, though in reality much development has not been curtailed, but rather delayed. Underpinning the long-term variation in policy approach (for example

Table 1. Retail planning policy 1993-2013 in England

Date	Title	Main aims
1993	Planning Policy Guidance 6; Town Centres and Retail Development	To sustain or enhance the vitality and viability of town centres which serve the whole community and in particular provide a focus for retail development where the proximity of competing businesses facilitates competition from which consumers benefit. To ensure the availability of a wide range of shopping opportunities to which people have easy access (from the largest superstore to the smallest village shop) and the maintenance of an efficient and innovative retail sector.
1996	Planning Policy Guidance 6; Town Centres and Retail Development	To sustain and enhance the vitality and viability of town centres; to focus development, especially retail development, in locations where the proximity of businesses facilitates competition from which all consumers are able to benefit and maximises the opportunity to use means of transport other than the car; to maintain an efficient, competitive and innovative retail sector; and to ensure the availability of a wide range of shops, employment, services and facilities to which people have easy access by a choice of means of transport. It is not the role of the planning system to restrict competition, preserve existing commercial interests or to prevent innovation. This policy focused on town and district centres as the preferred locations for development and introduced the sequential approach to site development.
2005	Planning Policy Statement 6; Planning for Town Centres	The government's key objective for town centres is to promote their vitality and viability by: Planning for growth and development of existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.
2009	Planning Policy Statement 4: Planning for Sustainable Economic Growth	To promote the vitality and viability of towns and other centres as important places for communities and ensure that they are economically successful recognising that they are important drivers for regional, sub-regional and local economies.
2012	National Planning Policy Framework; Achieving Sustainable Development	Ensuring the vitality of town centres. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period.

restrictive in the 1970s, liberal in the 1980s, slightly more restrictive in the 1990s) have been debates about modernisation and productivity of the retail sector, the potential fossilisation of outmoded and inefficient practices, equality of access to facilities for citizens, and competition with high street locations. Whilst planning should not be a brake on development, neither should it be an irrelevancy allowing a 'free for all'. Policy tries to tread a careful line between these two extremes, negotiating these various tensions (Table 2) along the way, though with different emphases at different points and times.

Sometimes, however, it is difficult to align policy objectives, as for example in reconciling the pro-development stance in the National Planning Policy Framework and the Town Centre First policy. This is compounded by tensions around a desire for more localism versus the pro-development stance and by the operation of the sequential test for retail sites, which can compromise commercial practices and social objectives.

Negotiating these tensions has meant that planning policy has been loosely controlling of out-of-town retailing over a long period. A large amount of out-of-town retailing has been built in the UK, with consequential adverse impacts and/or positive benefits for different groups of consumers, retailers, retail locations and thus high streets and town centres, despite the overt policy of supporting high streets and town centres.

The great recession

In November 2008, Woolworths went into administration and closed in the UK. They were not the first retailer to come under pressure as the great recession hit, but Woolworths' physical and symbolic presence was immense. The closure of 800+ high street stores represented a massive hit on high streets and ignited a debate on the state of the high street, the retail sector, and policy towards high streets and retailing. Woolworths were soon followed into administration and closure by other large – and small – retailers, not exclusively trading on the high street. Retail itself was in crisis, and as shop vacancy levels rose sharply and gaps appeared in centres across the country, the state of the high street became a focus of public, media and then political attention.

Some saw the situation as a reflection of reduced circumstances brought on by the recession. Others however saw the recession as the tipping point for longer-run structural changes in consumer behaviour and retail practice. The digital transformation of retailing – most notably seen in consumer online shopping, though substantially aided by technological enhancements in retail supply chains to stores and final consumers – and the changed consumer behaviours and priorities that ensued, have questioned the extent and make-up of store portfolios. How many physical shops does a retailer need in an era of digital consumers? Where should these be

Table 2. Tensions in controlling the development of retailing

Tension	Description
Efficiency and equity	There is always potential tension between social and economic goals, often expressed as a tension between efficiency or productivity and equity. New forms of retailing may be more efficient or have higher levels of productivity. Denying their development holds back local, corporate and national levels of productivity. On the other hand, concerns that allowing modern retailing to out-compete existing retailing in existing locations runs the risk of damaging social cohesion and the ability of particular consumer groups to access suitable shopping facilities.
New and existing locations	Restrictions on new locations for retail development run the risk of fossilising the existing retail structure and/or the retail or urban hierarchy. With an inability to invest in new sites and in effect protection offered to existing locations and retailers, so inefficiencies may be preserved. In such a situation, with a changing consumer base with new demands and patterns of behaviours and particularly rapid increases in access, the hierarchy remains the focus, even if it is outmoded in terms of consumer behaviour patterns or the physical infrastructure itself. Existing locations may be unable to incorporate new developments without the loss of significant historic or civic amenity.
Local and national scales of intervention	Regulation, such as land-use planning structures and processes, handed the decision making over retail locations and formats to national and local planners and away from those serving the customer (the retailer). This raises the question of who best judges the provision of such consumer facilities? At the same time tensions have arisen over the appropriate level of the decision making within government (national or local) and over whether there is a need for national consistency in policy or whether local flexibility best suits local situations.
Innovation and tradition	Retailers would argue that intervention militates against the most successful retailers as it constrains innovative practices. Innovative and productive retailers are constrained and retailers who may not be as effective in economic terms are protected. There could be seen to be more penalties for success and more rewards for mediocrity and lack of change and investment than there are penalties for lack of improvement.
Land-use retail planning and business regulation	Land-use planning has at its heart a concern with land use and not the user of the land. However as retailers become differentially successful, even dominant, so regulators become concerned over monopoly positions and power. Tension thus develops between land-use planning and business outcomes. This has seen the development of stronger competition and developmental (market share, unit size, fascia control) policy and its encroachment into land-use planning spheres.

located; in town or out of town, in large centres or small towns? As retailers have considered these questions and taken appropriate decisions for their own situations, some high streets have seen a cascading withdrawal of multiple retailers. Many, though not all, towns have witnessed a considerable reduction in their retail component in a short space of time, driven by changing consumer patterns, retailer confidence levels and restructuring pressures on retailers.

Reviewing the situation

As a consequence of this 'crisis of the high street', in early 2011 the UK Government asked the 'retail guru' Mary Portas to conduct a review of the future of the high street. The Portas Review was published in December 2011[1]. To all intents and purposes it was a supply-side analysis of space and use of the high street. Frustrated with the content of, and progress after, the Portas Review, Bill Grimsey, a colourful ex-retailer, portraying himself as an 'anti-Portas', assembled a small group which produced an alternative review in September 2013[2]. His report, while also focused on a supply-side analysis, began with a strong analysis of the demand side in terms of changing consumer needs and behaviour and the retail responses to these structural changes.

In between these two reviews, the Scottish Government commissioned Malcolm Fraser – a leading architect – to produce a national review of town centres, which reported in July 2013[3]. Based around the Patrick Geddes mantra of 'folk, work, place', the report sought to identify a people-focused, productive and rooted Scotland delivered through a broad-brush vision of town centres (note, not high streets[4]), recognising the roles of different levels of government and people in place-making, and not just businesses or retail or commercial support.

These three reviews obviously do not sit in isolation. Prior to Portas, there were other bodies concerned about the emerging situation[5]. Portas and Fraser have had formal responses from the Governments that commissioned them[6]. Devolved and other Government levels have produced their own investigations and reports, including potential implications for policy[7]. Many commentators and think tanks, including some set up by the government, have put their points of view into the public domain[8], and academics have also had things to say on the changes and their implications[9]. Professional and trade bodies have argued over the responsibility for the situation and the ways forward[10]. There is thus no shortage of commentary and suggestions over past and future policy for high streets and town centres.

Much of this commentary, however, is either politicised or parochial[11]. The academic input, whether to the government reports or to the ongoing debates, has attempted to think, and assist thinking, strategically, creatively, and thoughtfully about the policy directions needed.

The three main reports, Portas, Grimsey, and Fraser, represent an interesting development of thought[12]. Portas is very retail supply side focused and highly critical of costs in and management of high streets. Grimsey would not necessarily disagree but is much stronger on the structural changes that have brought high streets to this position and the need for digital solutions and stronger place management to be an integral part of the future. Fraser situates high streets within their broader towns and town centres and focuses on the need for 'place' to be more overtly embraced in our thinking about high streets. This reflects the emerging focus amongst social science academics on the structural change to high streets and town centres, and a realisation that community focused place-making is fundamental to the successful future of towns.

Implications for policy towards town centres

This developing realisation has a number of implications for policy for high streets and town centres. First, there is a much more shared awareness that retail alone is not the problem, but that high streets and town centres have to be about more than simply retailing. It is not simply retailing that has been decentralised and restructured leading to reduced footfall for high streets and town centres. Secondly, land-use planning via the town centre first policy and focused on retailing in isolation is now an irrelevancy. If policy and practice allows other uses to be decentralised (e.g. public and private offices, hotels, cinemas, schools, hospitals, sports/leisure facilities), then why should we expect strong footfall for high streets, when the rationale for people visiting them (whether for linked trips or single uses) has been removed? The town centre first policy has to be extended to uses beyond retailing. Thirdly, there is now more agreement on the need for stronger management of town centres and high streets. Whilst there is no consensus on the focus of this management, there is consensus on its need. Local authorities have been unable in many places to offer this spatial leadership, hence a developing interest in new models of town centre management, Development Trusts and Business Improvement Districts (BIDS).

These general policy implications are reinforced by more detailed components of the reviews and commentaries that have been undertaken. There are common themes across these three main reviews and the other broadly policy-focused discussion documents. First, both consumers and businesses (including retailers) perceive high streets and town centres as more difficult in many ways than off-centre or decentralised spaces. For retailers, there are issues of extra costs of operations (see below), but also in comparison to alternatives, town centres simply are less certain and more awkward to deal with. For many consumers town centres can be frustrating, confusing, unwelcoming, and more costly alternatives. Secondly, the most criticised component from all standpoints in this debate is the question of rates. Rates are seen as punitive and unfair, both in absolute and comparative terms. The retail sector, and the high street (and especially places away from London) have been penalised by an antiquated system that is not in tune with modern consumer or commercial practices. This has been exacerbated by the refusal to nationally revalue properties, despite the Great Recession and the consequent changes in property and use behaviours. Furthermore, structural change in the sector has gone unrecognised by the rating system, as seen by the differential costs between physical retail stores and the internet based suppliers of retail goods via warehouses. Thirdly, town centres are exhibiting a systematic failure and a waste of potentially productive assets. The cycles of alignment needed in terms of costs, property, uses, and development are simply too slow and unmeshed. The outcome is under-used space at the margins of the high street, as well as above ground floor level (mainly in the core of high streets and towns). There is need to make the system adjustments happen more quickly and smoothly, and to find new uses for what is essentially currently redundant space. There is need for careful framing of powers to allow such adjustments, to avoid if possible unintended consequences.

The future

In recent months the recovery from recession has begun to take hold, mainly in London and the south-east of England. Retail vacancies have begun to recede and some high streets are improving rapidly. It has also always been the case that there has been (and will be) differential performance and not all high streets, town centres or other places have suffered, even through the recession and the structural changes underway. However, retailing is changing and the need for and type of retail space is being increasingly questioned. Not all retailers have declined in the recession and this restructuring process; new formats and models have developed, sometimes raising new issues. For example there is currently much concern over the clustering and prevalence of particular uses in certain areas, as for example with bookmakers and pay-day lenders (often in income deprived areas) as well as charity shops more generally. The availability of vacant space has helped such uses develop and concentrate. Overall though, the basic fact remains: we have too much retail space and much of it is in the wrong format and in the wrong place. Retail policy, when operated by making land available, is not a suitable way to deal with such an important and dynamic sector, and has been shown to be ineffective during times of rapid structural adjustment and stress. The lack of positive policy towards high streets and town centres as well as failures at local level, have produced a pattern of neglect and decline. The irony of a land use planning policy being our core policy tool in an increasingly digital and virtual world is inescapable.

Academics and others are leading the way in being clearer about what planning can and cannot deliver and how to deliver and manage high streets and town centres, what land-use planning is unable to provide or manage. It is in this context that academics are exploring the new demands of consumers, retailers and places. What will modern retailing look like? How is consumer demand in a digital and physical world modifying, developing and morphing? What will the implications of these be for the high streets, the town centres they fit within and the nature of place? Retailing, high streets, and places depend on footfall, activity, and understanding how we can re-focus and re-imagine our high streets and places is becoming increasingly vital. New approaches to place management, community engagement, innovation and creativity, ownership, and marketing are needed at the same time that government policy redresses the wrongs of the taxation and costs systems and re-focuses on the need to make town centres places people are proud of and where they can live, work and play.

1. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6292/2081646.pdf
2. http://www.vanishinghighstreet.com/wp-content/uploads/2013/09/GrimseyReview04.092.pdf
3. http://www.scotland.gov.uk/Resource/0042/00426972.pdf. Leigh Sparks was the sole academic on the External Advisory Group producing the Review.
4. The distinction being drawn is that of high streets being only the ground-level retail element of the wider town centre which encompasses a diverse range of uses both vertically and horizontally in a place. In the wider debate these terms are often not used clearly, as for example media reports on 'the crisis of the high street' when discussing the collapse of out of town based retailers.
5. For example: http://www.boots-uk.com/media/App_Media/BUKCSR2013/Home/pdf/21st_Century_High_Streets_2009.pdf
6. http://www.scotland.gov.uk/Resource/0043/00437686.pdf and https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/7525/2120019.pdf
7. http://www.dsdni.gov.uk/print/reinvig_town_centres_report.pdf; http://senedd.assemblywales.org/documents/s5298/Town%20Centre%20Regeneration%20Report%20-%20January%202012.pdf; http://wales.gov.uk/docs/desh/research/140502town-centres-and-retail-dynamics-research-en.pdf; http://www.publications.parliament.uk/pa/cm201314/cmselect/cmbis/168/168.pdf
8. For example: http://towns.org.uk/files/C21-agora1.pdf and https://www.gov.uk/government/groups/future-high-streets-forum#minutes and http://towns.org.uk/files/AMT_TCentres.pdf
9. For example: Wrigley, N. and Dolega, L. 2011 "Resilience, fragility, and adaptation: new evidence on the performance of UK high streets during global economic crisis and its policy implications", *Environment and Planning A* 43: 2337-2363; Findlay, A. M. and Sparks, L. (2012) "Far from the 'Magic of the Mall: retail (change) in 'other places'", *Scottish Geographical Journal* 128(1): 24-41.
10. http://www.deloitte.com/assets/Dcom-UnitedKingdom/Local%20Assets/Documents/Industries/Consumer%20Business/uk-cb-consumer-review-edition-6.pdf; http://policy.bcsc.org.uk/beyondretail/index.asp; http://www.english-heritage.org.uk/publications/changing-face-high-street-decline-revival/773_130604_final_retail_and_town_centre.pdf
11. http://www.publications.parliament.uk/pa/cm201314/cmhansrd/cm130521/halltext/130521h0001.htm#13052163000001
12. For a fuller comparison of the three reviews see http://www.tcpa.org.uk/data/files/Journal_Blurb__Sample_Articles/Nov_2013_Sample.pdf and http://stirlingretail.files.wordpress.com/2013/11/the-good-the-bad-and-the-ugly-november-2013-compatibility-mode.pdf

3 Secondary retail during economic crisis and austerity

Anne Findlay and Leigh Sparks

Introduction

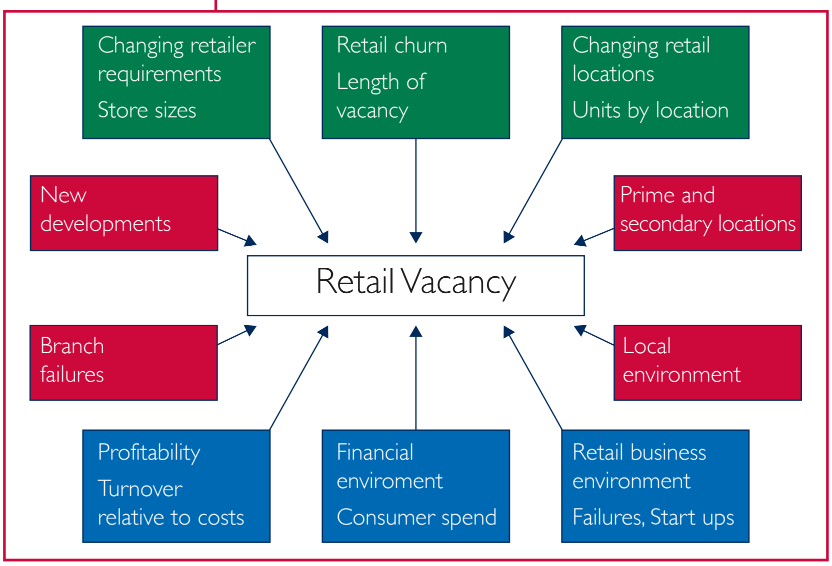
There have been many recent headlines on retail failure and the death of the high street, with vacancy rates of over 30% in some situations. It is important however to recognise that there are actually some places where there are very few vacancies, and streets and centres seem to be functioning actively. Secondary retail centres may be one such group of places. The definition of secondary centres can be somewhat nebulous, but is usually taken to relate to high streets and local 'town' centres within conurbations, local parades and neighbourhood centres.

With a few exceptions[1], secondary retail centres have tended to be ignored by retail researchers. There has been a tendency to take a dichotomised view of retailing and retail places; thus there are large multiple retailers and small independently owned stores, with the former succeeding and the latter declining. Likewise, there are retail centres in cities/large towns and other retail locations, with the former being modern and prosperous and the latter historicised and surviving merely as relics of the past[2].

The (con)fusing of the terms high streets, town centre and towns highlights a lack of cultural and spatial nuancing[3] and is symptomatic of a common assumption that everywhere and every business is the same. This assumption legitimises 'same-ing' policies[4]; but everywhere is not Harrogate, and nor should it be (although the Portas Review of high streets might give that impression). Places differ, and we need to recognise and understand how and why this is so[5]. Secondary retail centres illustrate this wider point. Whilst we recognise that not all secondary centres are the same, differing in mix, offer and purpose, and generalisation may not always be appropriate, there is sufficient commonality to provide merit in considering them as a group. This we ask, why are secondary retail centres different and what we can learn from them about retail change and the well-being of different types of retail places?

Figure 1. Understanding retail vacancy [15]

Economic context
Structural change
Local factors



Understanding retail change

Retail change in secondary centres has differed from say market towns or larger town centres because of the varying impacts of drivers of retail change (Table 1). In any given type of place these include local changes, the wider economic context, retail restructuring, and wider industry restructuring. Recession is thus only one aspect of current retail change. Retail vacancy arises from a range of directions with differing impacts in different places (Figure 1).

An important part of the research agenda at the Institute for Retail Studies at the University of Stirling has been to get a clearer picture of these various dimensions of retail change across all centres. An example of this has been our collaboration with the Local Data Company (LDC) to examine retail change across 100 Scottish towns[6]. The LDC datasets were used and interpreted to provide a contextualisation for retail change not available from much of the existing case study work. The Institute for Retail Studies research revealed considerable variations in metrics such as vacancy rates, new openings and closures of retail premises. In terms of the wider economic context, the research provides evidence that recession, as expressed in terms of vacancy rates, impacted unevenly across different retail places. All retail vacancy is not a product of recession, despite the fact that vacancy rates have

Level of change	Economic processes	Effects on retailing
Local context Processes at the local level	Investment Disinvestment Regeneration	Increased or decreased local demand A change in the type of local demand A period of churn
Economic context Business cycles Consumer expenditure	Boom and recession	Consumer expenditure unrealistically based Increased price awareness Vacancy trends, particularly persistent vacancy Branch closures Retail failure Lack of new investment and refurbishment
Structural change Retail formats	Internet Business costs Employment Property Planning	Increased role of multiple retailing Failure of comparison retailing Place transition from predominantly retail to service and leisure uses The move to hypermarket (food and non-food based) retailing and now to smaller in town grocery formats Movement of specialised retailing and certain retail products from shop based retailing to internet retailing The wide acceptance of discount retailing Lower profitability but high business costs Store network rationalisation
Wider economic context and processes Globalisation/ internationalisation of retailing Social, demographic and cultural change	Retailer ambitions Changing shopping patterns and consumer preferences New consumer segmentation	Types of retail locations need to reflect the degree of segmentation in society Global trends impact on retail networks and innovation. New entrants to market (including international internet business)

Table 1.
The drivers of retail change

been interpreted as the main metric of recession. Other variables such as 'churn' and 'persistent vacancy' reflect other drivers of change[7].

For example, The University of Stirling/Local Data Company research into various dimensions of retail change across all types of centres showed that smaller accessible market towns suffered the loss of multiple retailers more than more remote towns or larger accessible towns. Towns with a strong independent retail presence had lower rates of vacancy than towns dominated by multiple retailing. Multiple retailers relate differently to town centres from more regionally or locally based independent retailers. These towns are furthest from the headquarters of the company and the relationship between the company and the town is distant. Recession has led to the cancellation of new developments and critically the refurbishment and modernisation of stores. This has impacted on places where stores are too small or poorly designed for contemporary retailing or where the life of a store has been exceeded. Less prosperous places have been particularly affected. This work is now being extended via an ESRC collaboratively funded PhD between the University of Stirling and the Local Data Company.

Key retail structure changes were reflected in the decreases observed over various extended periods in the diversity of retail types. Many specialist retail activities have found a niche as online retailers. Consumers search for specialist products online and retailers can potentially reach a much wider market for products. At the same time, an ongoing process of town 'shift' or tertiarisation is taking place with increasing service and leisure offers and a decreasing comparison offer. It is in within this context that secondary retail centres merit specific attention.

Secondary centres: the long perspective

Work on secondary centres began in Stirling in the early 2000s with studies of retail-led regeneration projects in highly deprived areas[8]. Retail-led regeneration policies existed to attract new investment which would not only provide improved shopping facilities in secondary centres in deprived areas (or so-called food deserts), but would also stimulate a wider regeneration process, create local employment opportunities and even improve health outcomes. From a planning perspective this offered retailers new investment opportunities at a time of increasing restrictions on large store development. The concept suggested a new relationship between places and retailers as multiple retailers became actively involved in wider investment in local areas. Evidence from

Type of change	Parades	Secondary centres	Small towns	Large towns	Regional malls	City centres
Local factors	*	*	*	*		
Economic context						
Persistent vacancy			*			
Branch closures			*	*		
Lack of new investment		*	*	*		
Retail failure			*	*	*	
Business costs			*	*	*	*
Structural						
Place transition			*	*	*	*
Internet retailing				*	*	
Wider economic context						
Global retailers					*	*

Figure 2. Risk exposure of retail places during the recession

* Exposed to risk

academic research suggested that retail-led regeneration stores did make an important contribution to the retail mix in these areas and, after a period of churn, these places were stronger than previously.

Generally, there is a lack of consistent longitudinal (year on year) place-based data on shops which can give a longer term perspective distinguishing temporary and more lasting changes. Fundamental and unique to research carried out in Stirling has been an emphasis on developing and using such longitudinal datasets. These have included both longitudinal repeat questionnaire survey work (some dating from the 1980s) and repeat annual shop surveys in selected study areas[9]. These offer methodological consistency allowing comparative work to be undertaken. Longitudinal studies of retail change in secondary centres have been undertaken for over 15 years and are helping to provide the necessary evidence to develop an understanding of retail change in secondary centres.

Our longitudinal work shows that secondary retail centres have been relatively robust during the current recession. The evidence base suggests some reasons for this. Secondary retail centres have low multiple retailer representation, with most multiple retailer representation restricted to the convenience retail sector. Secondary retail centres have thus not been exposed to the same risks during recession as, for example, small accessible towns. As lower order centres they have not been as exposed to structural changes in retailing such as declining retail diversity. They have experienced a 'shift' towards increased leisure and service provision and a decline in comparison retailing over the 15-year period.

Secondary retail centres in both deprived and prosperous areas have experienced lower vacancy rates. Both share the lack of exposure to multiple retailing. They perform similar roles in servicing a local population. Significantly, centres in both types of area service relatively homogeneous social groupings (at different ends of the social spectrum). Is there 'glue' in secondary centres (deprived or prosperous) which contributes to this? These places operate on a different scale from other types of retail places. Community engagement in secondary centres is often present, although informal rather than formal[10]. Business Improvement Districts have been suggested as a way of enhancing the 'glue', at least between businesses[11], and providing formal focus and process.

The scale of secondary centres is reflected in the linkages between retailers and places. In larger centres these linkages often involve more distant networks. In secondary centres these local relational factors may be important in helping retail places manage change. This relational lens[12] may be key to future retail policy, focusing on the role of the community and the limitations of community-based approaches at different scales of centre.

Discussion

The fact that secondary centres have experienced recession differently from other retail locations (such as market towns and larger centres) is due more to their lack of exposure to risk from business cycles than to their resistance to wider structural changes. Wider economic processes originating in the national and global economies have impacted less on secondary centres where local processes (e.g. regeneration or the lack of it) can have a much more fundamental impact in shaping their retail environment. Many secondary retail centres were late to receive major capital investment by multiple grocery retailers (and some never have), but regeneration has benefitted them and helped them to be more resilient.

There has been increasing emphasis on resilience, especially the REPLACIS research strand in Europe[12]. An approach based around resilience provides a useful way of understanding retail change and has potential in relation to other retail environments[13]. Resilience can be defined as the ability to cope and adapt. There is another linked perspective which looks at vulnerability and degree of exposure to risk[14]. 'Risk is a function of exposure (vulnerability) minus coping ability (resilience), so that the greater the exposure the greater the required coping ability'[7].

Different types of places face key risks in relation to local economic circumstances, wider economic trends and structural change. Using this framework we have assessed risk exposure of different retail places during the recession (Figure 2). The level of risk is heightened as exposure to risk moves out of local control and into wider capitalist networks with very different retailer-place relations. Management of risk needs to be much greater where exposure is greater. The types of response required also vary by risk level and exposure. Secondary retail centres lie towards the top left of the diagram with the greatest risks being locally generated factors. The approach illustrated in Figure 2 might also be applied, for example, to create more robust high streets and town centres by ensuring that measures strengthening resilience are matched to risk exposure.

Conclusions

We can draw three conclusions about secondary retail centres during recession. First, the retail structure of these areas has exposed them less than other types of retail areas to national and global economic processes. Second, the 'glue' that gives these centres local identities also has the potential to act as a coping mechanism. Thirdly, we have suggested that the place/retail relationship, characterised as a relational lens, is an important consideration in understanding retail change, levels of risk and exposure, and in developing place-relevant coping mechanisms. This is not limited just to secondary retail centres. A variety of responses to the forces of retail change are needed. The scale of places is very important since policy needs to be able to meet the needs of differing retail places which face different risks and which have very varied coping mechanisms. The challenge is to provide an adequate policy framework to understand and manage the intersection of retail, economic and social change at different scales and in different retail contexts.

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4 Convenience culture and the evolving high street

Neil Wrigley and Dionysia Lambiri

Introduction

In mid 2014, as the UK economy returned to robust growth after six years of economic crisis and austerity, the IGD (Institute of Grocery Distribution) published a 5-year forward look to the likely configuration of the grocery market in 2019[1]. To the non-specialist reader, some of the trends the report revealed and its estimates of differential sales and market-share growth or decline, must have been rather unexpected. Whilst the overall size of the grocery market was forecast to grow strongly – from £175 bn to £203 bn (16.3%) – significant changes in consumer behaviour which had been ongoing for more than a decade but which had been exposed during the years of crisis and austerity, were viewed by IGD as likely to produce major shifts in the structure of the market.

Two of these shifts – involving a more than doubling over 5 years in the estimated sales of both online and 'discounter' grocery channels to reach market shares in 2019 of 8.3% and 10.5% respectively – had been well covered in the media, where there had been increasing focus on the competitive squeeze being exerted on the leading middle-ground 'big 4' supermarket operators (Tesco, Sainsbury, Asda-Walmart and Morrisons) by the limited-range discounters Lidl and Aldi. More surprising, however, were:

- IGD's forecast that the convenience store grocery sector would add more sales (+£11.6 bn) than any other sector and by 2019 would account for almost a quarter (24.1%) of total UK grocery sales up from 21.4% in 2014; and
- the implications of the differential sales growth and market share shifts for the once dominant one-stop 'superstores & hypermarkets' sector whose market share was forecast to collapse over the 5-year period from 42.2% to 34.9%.

Commenting on these forecasts and the continued rise of the convenience sector, the IGD chief executive noted that:

> 'shoppers now expect grocery retailing to organise itself around their lives rather than building their routines around [the retailers] – they expect to buy whatever they want, anytime, anyplace in the most *convenient* way to them[2]'.

In this short contribution we focus on this, perhaps unexpected, but continuing rise of convenience retail in the UK market. In particular, we examine how it reflects wider shifts in consumer behaviour and cultures of consumption which have collectively been referred to as *the rise of convenience culture*, and we suggest why it may be a hidden or insufficiently developed driver of change in many assessments of evolving post-economic-crisis high streets.

An evolving culture of convenience

Retail has always been about convenience. However, what is commonly understood by the term convenience in the context of retail and consumption has constantly shifted throughout the 20th and 21st Centuries, sometimes in minor ways, but sometimes substantially. At its roots, however, convenience in this context is linked with the valuation individuals and households place on time, and on the bargain they are effectively prepared to strike with retailers to invest more of their time in the shopping process in return for lower prices. The early supermarkets of the 1920s and 1930s in the USA dramatically altered the prevailing balance of that trade-off which consumers of the period had previously accepted in the typical small counter service grocery stores of the era [3]. And the same trade-off of consumer time for lower prices underpinned the shift from counter service to self-service stores from the mid-1950s to mid-1960s in the UK[4].

Over the past decade, important and highly complex shifts in consumer behaviour have been taking place in the UK, indicative of similar re-evaluation. Consumers have adjusted to and increasingly embraced online shopping, but additionally (and some groups more than others) have sought convenience at the local/neighbourhood level. In other words, although technology-driven to an important extent, these shifts are rooted in part in the significant lifestyle and sociodemographic changes which have characterised recent decades. That is to say, in the growth of non-traditional households, the increase of women's participation in the labour force, longer working hours, and population ageing. However, the drivers are also clearly and significantly much wider[5]. Some groups of consumers appear to have become less convinced by the concepts of convenience which had held since the 1960s and have begun to rethink the economic and social costs associated with long rather than short distances to shop, to reassess the time-cost savings commonly attributed to large and sometimes inhospitable one-stop out-of-centre stores and, since 2008, to adapt their behaviour (consciously or unconsciously) to economic crisis and austerity in a way that is supportive of a local/neighbourhood conception of convenience. In the latter case, for example, by use of more frequent top-up shopping at a greater number of local stores, to more appropriately balance their household demands against supply. It is these factors in combination which define the shorthand description convenience culture, and the shift to such a culture is strengthened by businesses able to supply either a choice-edited neighbourhood version of the range and quality of the out-of-town offer, or alternatively something specialist and/or rooted in the local community.

These important shifts in consumer behaviour and prevailing cultures of consumption towards what we refer to as convenience culture have been widely recognised but not always labelled in the way we discuss in this contribution. However, when industry-leading commercial property company Colliers International discusses 'the quantum shift in shopping habits[6]' which characterises the current period of profound and disruptive change, or the Chairman of Tesco outlines in interview how 'what it means to shop is going to change...[in a manner that] is going to be so far-reaching, and more rapid than we imagined'[7], they are articulating the same issues as we have considered above. In other words, they are drawing attention to the way the intense technological innovations, favouring massive growth of online and on-the-go retail channels (e-commerce, m-commerce), combined with the extension of use and ownership of technology, have created complex interaction effects with these underlying shifts in consumption practice and culture, to the extent where they have produced changes which even the most sophisticated consumer facing retailers and service providers have found disruptive and increasing difficult to read.

The rise of convenience retail

Two decades ago in the mid 1990s, the UK convenience store sector (stores under 3,000 sq ft) was a relatively slow-growth marginalised sector in which the major corporate food retailers had limited presence, and which had been largely left to smaller corporate chains, and symbol groups. It was also a sector which reflected a wider long-term trend (certainly back to 1950s) of declining numbers of small and specialist independent stores resulting from a range of issues including: changing consumer expectations, cost and ease of access to out-of-town one-stop shopping, inter-generational succession problems, increasing regulatory burdens, and the difficulties of spreading rising costs of doing business across a limited scale of turnover. A decade later, however, the convenience store sector had begun to feel the benefits of the rise of convenience culture and its prospects had been transformed. In 2006, the IGD was forecasting significant (23%) growth over the next 5 years[8]. Additionally, following acquisition-driven sector entry by two of the UK's leading corporate food retailers during the period 2002-04, IGD was drawing attention to the competitive benefits accruing to consumers from the forcing up of operating standards and widening of product ranges. That is to say, as the Verdict Research (2006) report on *Neighbourhood Retailing*[9] stated at the time:

> 'multiple retailers have brought fresher food, new ranges, lower prices, better store environments and increased scale to the neighbourhood, and it has forced smaller players to improve to keep up'.

The entry of the leading corporate food retailers into the sector was portrayed - both at the time and subsequently – as an opportunistic reactive response to an unexpected interpretation by the Competition Commission of the structure of the UK grocery market[10]. The so-called two-market interpretation first suggested in 2000 effectively gave the regulatory green-light to those major firms to enter the convenience sector by acquisition, and from 2002, beginning with Tesco's acquisition of the 862 T&S stores, that is what occurred.

However, that is too simplistic an interpretation. Another interpretation has two components:

- That the sophisticated customer insight techniques of the leading retailers had detected the emergence of some of the features of what we have termed convenience culture; and
- That as a consequence of adapting their new store development formats to the requirements of the

town centres first policies, the leading retailers had developed the organisational and operational skills where they could operate networks of small stores with levels of efficiency and profitability approaching those obtained from their larger-format stores in the 1980s. That is to say they were strongly motivated to be proactive in their attempts to capture some of the key facets of convenience culture as part of their competitive advantage[11].

Over the 15-year period from 2000, the convenience store sector was seen to be growing strongly in almost all the empirical studies which reported. It is important to stress, however, that it was not solely the new generation corporate convenience formats (the Tesco Express, Sainsbury Local, Morrisons M Local and Waitrose 'Little') which expanded. Both non-affiliated independents and stores affiliated to symbol groups (Spar, Londis, Costcutter, etc) grew equally strongly and sometimes more rapidly – a growth that was not solely a product of buoyant economic conditions in the early 2000s, but which carried on from the mid-decade including the period of crisis and austerity[12].

By the time that town centres and high streets were emerging from crisis in mid-2014, the convenience sector had become one of the most dynamic in UK retailing, generating total sales of approximately £37 billion from more than 47,000 outlets[13]. Although, the new generation corporate convenience stores had grown and continued to grow at a rapid rate (e.g. increasing numbers by 13.6% in the year to April 2014[14]), with Tesco operating more than 1,600 Express stores and 700 One Stop branded units and Sainsbury over 600 Locals[15] in UK town centres and high streets that accounted for less than one in ten of convenience stores. However, the corporate stores 'punched above their weight', generating 19.4% of sales from only 7.6% of the store numbers[16], and continued to generate the emulation effects on operating standards and product ranging noted by Verdict and IGD almost ten years earlier. During the years of crisis and austerity, the sector had often been able to absorb some of the vacant property-unit slack. For example, Morrisons acquired 49 former Blockbuster stores in 2013[17] to speed the growth of its relatively late entry into the convenience store sector.

Convenience retail – benefits and costs debates

An early study of the impacts of, and community responses to, the new generation of corporate convenience stores was conducted by the University of Southampton in 2005 in four communities in Hampshire. Responses of 650 consumers to the conversion of previous One Stop convenience stores in those communities into Tesco Express format outlets were obtained using a rigorous survey design and a notably labour-intense but high-response-rate home-administered questionnaire method. In all four communities the conversions were found to have induced:

- A major relocalisation of food shopping (particularly secondary/top-up shopping) – away from distant superstores and towards stores in the local community.
- Important travel substitution effects involving significantly increased walk/cycle-based and reduced car-based food shopping travel miles, supportive of Government objectives on transport sustainability and health.
- Highly positive community responses to, and increases in consumer welfare from, being able to access products locally (particularly fresh/healthy foods) which previously had involved considerable travel distances to obtain; and
- Negligible diversion of trade from local independent stores – with the large majority of items additionally brought at the Express stores having previously been sourced from more distant superstores – and, moreover, indications of the possibility that food shopping claw back from distant superstores might increase the patronage and viability of other local retailers and service providers.

Despite these early findings on the relocalisation effects and the town centre/high street supportive nature of the expansion of the leading UK food retailers in the convenience store sector, the expansion has remained surrounded by controversy. There have been two components to this controversy. First, and a major driver of the Competition Commission's *Grocery Market Inquiry* 2006-08[19] were concerns that the expansion of corporate retailers into the convenience store market was adversely affecting small and specialist independent retailers. Second, the belief of some economists and elements of government that small, centrally located stores might be inefficient, and significantly reduce retail productivity.

The first of these components was extensively researched and debated during the *Grocery Market Inquiry*. Parallel studies of retail change in more than one thousand town centres and high streets during the early 2000s by the Competition Commission and the University of Southampton[20] found unexpectedly, given prevailing views at that time, evidence of considerable new entry and robust growth in independent convenience store numbers. Additionally, the studies found that many types of small and specialist stores performed more robustly in the face of competitive corporate food retailer entry than was commonly believed. Whilst these findings did not end debate, they gradually and usefully altered its focus – shifting it towards attempts to articulate the benefits of independent, small and specialised store diversity in enhancing the resilience of town centres and high streets.

The second of the components relates to the strongly held view of some economists that the town centre first policy is an example of the powerful and *dirigiste* planning policies that are sometimes introduced without informed consideration of their likely costs. In the view of a group of LSE economists:

> 'there are a number of obvious adverse consequences of forcing retailing into small and often awkward sites in 'town centres': these locations will be less convenient for suburban shoppers (an ever growing share of the population) and the smaller stores will, compared to large format out-of-town stores, be able to offer less variety, at higher prices'.[21]

Using unique store-specific data from one of the four largest supermarket chains in the UK[22], these economists have recently been able to estimate the costs (measured by loss of output) imposed by the implementation of the town centre first policy in England. They find those costs to have been very significant.

Although these are undoubtedly extremely insightful and rigorously obtained findings, their weakness in terms of understanding the evolution of UK town centres and high streets is that they take no account at present of the off-setting benefits which supporters of the town centre first policy have always claimed accrue from the policy. Also, and importantly in the context of our arguments in this short contribution, they are based on a very static and in certain respects outmoded view of consumer welfare. More precisely they overlook the possibility that the significant shifts in consumer behaviour which are driving the expansion of the new small format in-centre stores might reflect a genuine reappraisal of what consumers value. That is to say, consumers' appetite for the convenience of the local and for simple to shop choice-edited versions of larger-format stores, together with their increasing rejection of the inhospitable out-of-town big box stores might imply that alternative metrics for assessing consumer welfare gains are necessary. In other words that the metrics the LSE economists would expect to use are likely to need rethinking to reflect the rise of convenience culture. Clearly it would be absurd to argue for a more efficient, less costly (in terms of output and productivity) retail development-control system, if its result was merely to create a landscape with more of the 'future white elephant' out-of-centre stores which consumers seem to be turning their backs on and which the leading retailers have increasingly been forced to write down the valuations of or mothball. As the recently ousted Tesco CEO made perfectly clear in 2012:

> 'I am not calling the end of hypermarket era. All I'm saying is that in the future […] do we need to continue to build large hypermarkets in the UK when the internet is taking much of the growth in clothing and electronics? You can reach your own conclusions'.[24]

High street reconfiguration: a key role for convenience retail?

As UK town centres and high streets gradually emerged from crisis during 2014, the IGD's 5-year forecast with which we began this contribution indicated the continued growth and strategic positioning of convenience retail in any likely future reconfigurations of these essential hubs of the community. Whilst it is clear that any reconfiguration will inevitably involve a continuation of the long-term structural shift away from retail provision to services of all types, but especially leisure (e.g. bars and cafés), health and beauty, and medical-related services – a shift observed in several studies over the past decade – it has become equally clear that:

> 'With high street retail having seemingly weathered the worst of the economic downturn, rafts of retailer administrations and rapid technological and consumer change, we are seeing evidence of its new role in the retail hierarchy.' [25]

To understand that new role involves appreciating emerging forms of complementarity between online retail & service provision on the one hand, and more traditional but rapidly adapting physical distribution and fulfillment via town centres and high streets on the other[26] – e.g 'click and collect' and its many hybrid and as yet unknown extensions. Additionally, however, it involves appreciating significant shifts in the way consumers now expect retailers to organize themselves around a growing expectation of 24/7 convenience. In particular, how that might reveal itself both in new forms of complementarity between corporate retail provision and the diversity of small & specialist providers, and also between high streets as retail spaces and high streets as spaces for leisure, service provision and social interaction. What is clear, however, is that:

> 'With many modern retail high streets perfectly positioned for top-up shopping, achieving the right mix of multiple and independent retailers and leisure offers such as cafes and bars, can position a centre alongside online shopping, not against it'. [27]

Convenience retail – always an important component of the ecology of our town centres and high streets – has, perhaps to the surprise of some, emerged strongly from the years of crisis and austerity and occupies a strategic position in ensuring the future vitality and viability of these vital commercial and community spaces. Empirical studies focused on that strategic role are as yet extremely sparse, although early evidence on the trip-generative nature and anchor role potential of new generation corporate convenience stores in small towns has been reported[28]. Yet it is the wider but powerful components of a shift in the cultures of consumption to what has been termed convenience culture which is of greatest importance. Whilst it is undoubtedly a fuzzy concept, convenience culture nevertheless captures important facets of shifts in consumer behaviour and valuations. At the very least, those shifts must be incorporated into the measurement of the benefits of town centre first policies to prevent an overly economistic negative assessment of the impact of those policies gaining too much traction.

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A helping hand? The contribution of the night-time economy to the evolving high street

5

Marion Roberts

Introduction

The expansion of the night-time economy has made an impact on many of Britain's high streets. This contribution will consider the impact of the growth in night-time activities, especially those related to alcohol. There are problems, however, in assessing how the recession of 2008-2013 has impacted on the night-time economy in UK high streets, because there is a lack of detailed publicly available statistical information both at national and at regional level. Difficulties occur because many businesses, such as restaurants, operate in the day time as well as at night. Furthermore, although some commercial assessments of the leisure and hospitality industries are accessible, these summaries refer to both out-of-town and high street locations. Nevertheless, one estimate of the total value of the night-time economy in the UK presented a figure of £66bn in 2009, providing employment for 1.3m people[1].

Some inferences can be drawn from broad-brush government statistics. Table 1 sets out the total numbers of licensed premises 2008-2012, the numbers of premises offering late night refreshments such as hot food take-aways and premises with 24 hour licenses. This last category includes hotel bars, supermarkets and stores. Each category shows a year-on-year increase. No figure is shown for 2011, because in the year after the general election, alcohol licensing was passed back to the Home Office from the Department of Culture Media and Sport (DCMS).

In a similar vein, Table 2 sets out the numbers of premises licensed for entertainment, which includes music, sporting, or film events. Some premises are licensed for more than one activity and for selling alcohol. Again, a year-on-year increase is shown, but this may conceal variations between places. Variations are suggested by the figures for overall consumer expenditure on catering, which remained between £40bn and £50bn p.a. between 2008 and 2011, rising from 2009 to 2010, but fell back by 0.9% in 2011. While expenditure on alcohol increased as a whole in the same period, there was a 10.5% decrease in spending within licensed premises between 2007 and 2011[4 (p 16)]. Individual local authorities such as the Greater London Authority (GLA) have commissioned their own consultants' reports to assess the value of the night-time economy in their areas, but these are insufficient to assess how particular types of high street in the UK have responded to the crisis.

This contribution draws on mainly qualitative academic studies and market research to discuss trends and continuities, the persistent problems of effective and appropriate regulation, and gaps in knowledge and policy. Gaps in knowledge need to be overcome to provide licensing and planning authorities with sufficient tools to manage future expansion as the UK moves out of recession.

The influence of the UK's night-time economy extends to the European mainland and international destinations such as New Delhi and Dubai, where, for example, DJs and club owners who started in the UK have been able to expand their activities. The supply chain extends across creative industries, such as music and fashion, as well as the service sector and hospitality industries. In contrast to retailing, nightlife is unlikely to be supplanted by new technologies because its core purpose is about meeting, sociality and communication.

Table 1. Licensed premises in England and Wales 2008-2012[2]

Year	2008	2009	2010	2012
Premises licenses	195,800	198,000	202,000	202,000
Late night refreshment	77,400	81,600	84,900	87,300
24 hr Alcohol licenses	6,900	7,600	7,800	8,400

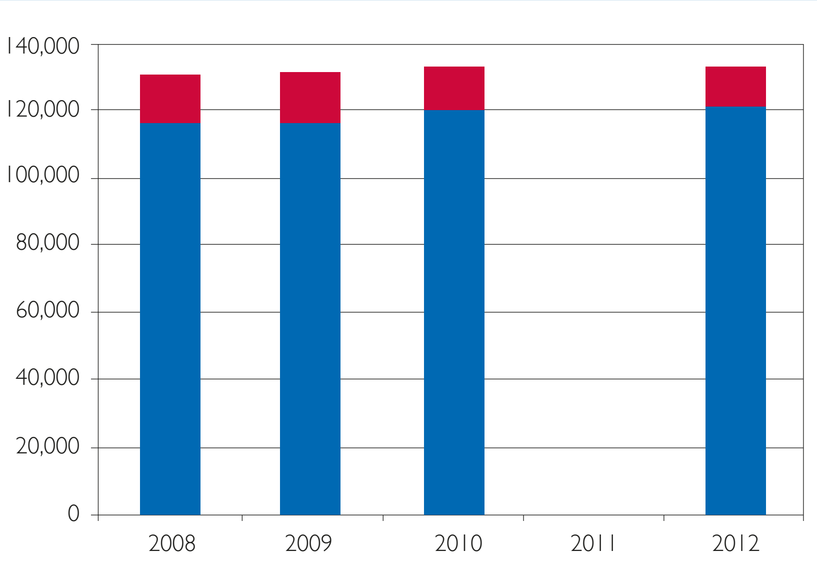

Table 2. Numbers of entertainment licenses 2008-2012 [3]

Entertainment club premises certificates

Entertainment premises licences

The impact of the shockwave of the economic crisis

The first two years of the recession saw a decline in turnover in the restaurant sector[5], a decline which was subsequently reversed. Nightclubs have also seen a reduction in turnover, leading to some changes in their format[6]. The UK's largest nightclub chain, Luminar, went into in administration in October 2011, but the business was purchased two months later by three leisure industry specialists and by May 2014, its 53 nightclubs were back in profit[7]. There has been other restructuring within the high street bar/dance bar/pub sector partly in response to the first years of the recession. There is growth within this sector too, for example Mitchells and Butler, one of the largest corporate owners in the UK hospitality industry, with well-known brands such as All Bar One, moved from a difficult position in 2011 to being able to take over an entire pub chain in 2014[8, 9]. The spatial impact of these changes has been diverse, with one consultancy estimating that the total numbers of licensed premises, including pubs and restaurants, declined by 9% between 2003 and 2013 in town centres and by 20% in the suburbs, but that city centre numbers increased by 8% in the same period [10].

Long term trends

In the UK, the growth of activities that extend into the evening and the night have been dominated by alcohol-related consumption. Pre-recession, the most recent expansion was configured around a rise in the numbers and size of bars and clubs directed towards a youthful clientele[11]. These tend to be mainly, but not exclusively, located in or near high streets in many sizes of urban centre. These can be in market towns, such as Grantham, suburban centres, such as Crowhurst or small settlements, such as Tynemouth. In some larger centres there may be a number of clusters of night-time venues, in a dispersed pattern.

The expansion in bars and clubs was not the only story behind an increase in evening and night-time activity. Prior to the recession, the restaurant sector saw a steady growth in a varied food offer, spurred on by media interest and a rise in disposable incomes[12]. Meanwhile, the supermarkets responded to Britain's culture of long working hours by opening small stores in the high street that stay open until 11pm, constituting significant growth in this sector of retail[13 (p 10)].

Alcohol-related expansion did not come without a cost. Late night crime and disorder in town and city centres still poses a challenge for police forces and local authorities. Also, the profits to be made from the new style of large-scale high street bars and clubs is one of the factors adding to the decline in the numbers of traditional pubs. The British Beer and Pub Association estimate that the number of pubs reduced from 54,818 in 2008 to 49,433 in 2012[14]. The domination of alcohol-related venues in particular micro-districts in some night-time high streets acts as a deterrent for a wider demographic to go out at night, although these same streets may be inclusive during the day.

There have been changes in behaviour which seem to be long-term. The 'big night out' featuring a spontaneous circuit through a number of bars and clubs appears to be an established feature of young people's experience of the night-time economy. The price differential between drinking at home and out of the home in pubs and bars is one of the contributors leading to 'pre-drinking' which in turn exacerbates the problems of late night drunkenness. Having noted this, it is important to stress that the 'big night out' is only one of the set of behaviours favoured within the night-time economy as a whole. Meals out, combined with visits to the cinema and other attractions, are popular with a wide demographic, who cannot be split into categories of drinkers and non-drinkers[15]. A challenge for policy makers and planners is to accommodate these diverse activities within an appropriate regulatory framework in the context of a pre-existing built environment. This also includes ensuring that the sleep of existing or new urban dwellers is not disturbed. Recent urban policy has encouraged town centre living and mixed-use development, leaving these tensions to be reconciled.

The regulatory environment during the period of economic crisis

The regulatory environment for the night-time economy is complex. The overarching trading environment is set by EU and national legislation.

At national and local levels there is not only a direct interest on the part of the police and the criminal justice system, but licensing (alcohol, entertainment and private hire vehicles), planning, environmental health, transport, and public health each have a part in policy and practice. Policy developments have been, in the main, reactive. Hence the Licensing Act 2003 simplified the previously overly complex arrangements for alcohol, entertainment and late night opening, but retained the quasi-legal systems of licensing and planning. Changes to the Guidance to the Act between 2008 and 2014 have responded to pressure for more freedom to hold live music performances. The revised fee system for the administration of licensing, which includes enforcement, has proved to be inadequate for many authorities, who, due to cuts in local authority expenditure, continue to struggle to supply the necessary officer time.

The criminal justice system has responded to increases in alcohol-fuelled anti-social behaviour and crime by introducing new powers for the police to control consumers, but actions to address supply have proved more difficult to identify and promote. For example there are legislative powers that are regularly ignored, such as the statute which prohibits serving an already drunken person[16]. While this is feasible to enact in a small traditional pub with a repeat offender, the crowded conditions of a large crowded bar or club make it difficult to enforce. Planning authorities have often welcomed the introduction of new bars in large historic buildings, which otherwise would remain vacant. The Late Night Levy, a new power which allows local authorities to raise a charge on premises that serve alcohol late at night to fund extra policing, has so far only been taken up by a small number of local councils. One of the problems cited is that the charge has to be made on all premises within the local authority area, with a consequent unfairness for well-run premises who are located outside the immediate hot spots within town centres.

Recent research has demonstrated that the regulatory regimes are being implemented unevenly across different urban centres[17]. While on the one hand this might be interpreted as a good example of localism in action, a less benign reading might interpret it as a differential related to varying levels of resource and expertise on the part of local authorities themselves. Currently the Government is relying on a voluntary scheme, Purple Flag, to raise the standard of night-time town and city centres. The scheme, now taken up in almost 50 places, is administrated by an NGO, the Association of Town Centre Managers (ATCM), and has been funded and supported through a combination of public and private sources. In a similar vein, schemes to raise the standards of management within licensed premises are operated on a voluntary basis.

While these efforts to improve the quality of high streets in urban centres centres have led to a number of measurable benefits, such as reductions in crime and anti-social behaviour[18, 19], some social scientists have criticised a preoccupation with business, arguing that better conditions for the hospitality industry might not lead to benefits for the population as a whole[20]. This criticism raises wider issues and challenges, suggesting that immediate responses to particular detailed issues distracts attention from the broader question of what kind of night-time economy is desirable, for whom, in which places and for which days of the week.

Challenges for public and private stakeholders in the night-time economy of the high street

The expansion in alcohol-led nightlife has led central government to produce two successive alcohol strategies which frame alcohol consumption in terms of problems with regard to health and crime and disorder[21]. Recent academic research has provided an alternative perspective through focusing on drinking as a cultural manifestation, the social glue that helps to promote social cohesion[22,23]. While this might seem to be far-fetched, nevertheless the significance of alcohol to many patterns of behaviour, from meeting a friend for a drink to the rituals associated with weddings and formal dinners, cannot be denied. With this perspective, going out at night can be viewed as a set of experiences to be supported and managed rather than as a series of economic transactions between consumer and producer.

Recent studies have highlighted the importance of spontaneity to nightlife, of the heightened sense of emotion and excitement that going out offers[17]. The challenge for policy makers is to decouple this party atmosphere from the disbenefits of drunkenness and disorder. The research provides support for the holding of local night-time festivals and events, 'white nights', and for experiments in new types of activity, such as night markets. These activities attract a broader demographic, thereby creating a more inclusive night-time environment. Here again, restrictions on local authority spending have an influence on what can be achieved.

A related difficulty lies between the potential for new entrants to experiment with different types of venue, independent and alternative in nature, and the structure of high street and town centre rents and rates, where owners are looking for the highest yields and returns. This leads to a tendency for corporate brands to dominate in the most popular big city centres, especially when a substantial investment is required to acquire a license and suitable property. More questions remain over a nuanced understanding of the property market and its relationship to different forms of nightlife and to what extent cheaper spaces in local high streets can support new entrepreneurs.

The property market has acted as a help and a hindrance in the development of the night-time economy. The expansion of major nightclubs in the 1990s was assisted by the large numbers of vacant and cheap properties left over from the recession of the late 1980s. The subsequent rise in property values has not only excluded alternative and independent venues from larger town centres, but has led to conversion of pubs to housing, or convenience stores in smaller centres. While the provision of the Localism Act has given powers to local authorities to delay sales of these community assets, this does not solve the problem of how venues which provide a forum for low volume sales and relaxed conversation can remain viable. This is a problem where cooperation between the government, local authorities, and operators is needed to find solutions.

The future

As the UK moves out of recession, it seems reasonable to forecast that more people with disposable income will want to go out at night. It is also highly probable that a wider demographic, including an older generation for whom nightlife is an established feature of social life, would want to participate. An expansion in the sector offers opportunities for a growth in jobs and the possibilities for new enterprises. It offers the potential for improvement to the management of existing nightlife clusters, undertaken locally, but with a revised set of policies and fiscal arrangements from central government that recognise local circumstances. New possibilities are emerging to fill the vacant properties in ailing local high streets, with hybrid café-bars and micro-pubs for example.

The pressure to create new housing in urban extensions and new towns[24] and cities offers the exciting prospect of setting out a physical framework for the night as part of the infrastructure of new settlements. New settlements could have high streets that are designed to incorporate night-time activities, planned to avoid over-concentration or disturbance. This will require urban planners to reverse the precedents set in garden cities and the post war generation of new towns, where public houses were severely controlled in numbers and night-time gatherings restricted to the village hall or the soulless town centre[25]. The demographic in the next generation will be more diverse in ethnicity and cultural background, more varied in household structure, and will include young people whose experience of social life differs from their parents' generation. Here the learning derived from a decade or more research into night-time economy issues can be put into place, to create a future attuned to the needs of the twenty-first century.

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Managing town centres during the crisis: from retail-focussed management to the experience economy and beyond

6

Andres Coca-Stefaniak and Shanaaz Carroll

Introduction

The effect of the global economic downturn of 2008 on town and city centres in the UK – and much of the western world – has been swift, enduring, and a major challenge to accepted wisdom in the management of town centres. Not surprisingly, issues such as economic resilience[1] and its reincarnations, in the form of future proofing[2] or even town centre performance[3], have grown in popularity as trending topics of debate among academics, practitioners and policy makers. Yet, although on the surface these may be valid issues for contention, they often fail to address the root of the problem – many town centres are anchored in the past in terms of their service offer and strategic positioning. The marketing of town centres as shopping destinations is nothing new but, unfortunately, it is also a paradigm that in many cases has seen little change since the 1980s.

A growing body of research[4] argues that consumers' expectations today go well beyond the functionality that town centres can provide in terms of their retail offer. Instead, it is the type and quality of the overall town centre experience that is becoming key to visitor engagement, satisfaction and local resident loyalty. The advent of what was contentedly coined in 1999 as 'the experience economy'[5] has manifested itself since in the growth of the evening and night-time economy, with an estimated worth of £66 billion and remarkable levels of resilience during the economic downturn. However, none of this success materialised by chance. Professionals in the hospitality sector – largely responsible for the service offer of the evening and night-time economy – have long understood the importance of anticipating consumer trends and offering carefully designed services focusing on the customer experience. Today, this approach is actively recognised[6], supported, and exported overseas by Europe's first area-based evening and night-time economy management accreditation system – Purple Flag[7].

Town centre management as a response – from reactive to proactive

Town and city centre managers responsible for management of the daytime economy of town centres in the UK would do well to learn from the success of the evening and night-time economy. Although not as widely recognised as other related professions such as urban planning or local economic development, town centre management has existed in the UK for over thirty years. This tailored approach to the management of town and city centres has been defined by the Association of Town and City Management (ATCM) as:

> "a co-ordinated pro-active initiative designed to ensure that our town and city centres are desirable and attractive places. In nearly all instances the initiative is a partnership between the public and private sectors and brings together a wide-range of key interests".[8]

This definition, and partnership-based approach, builds on a legacy of practice in the UK influenced by a wide array of disciplines (Figure 1), which includes strategic planning, economic development, retail, urban regeneration and sustainability, among others, with clear parallels to other spheres, including urban planning[9] and place branding[10].

It would be impossible to consider town centre management in the UK in isolation from events and developments elsewhere in the world[12]. Recent estimates indicate that there are more than 2,150 formal and informal town centre management schemes across continental Europe and a further 3,000 private sector-led Business Improvement Districts (BIDs) operating in North America. In Europe, the foundations of many inceptions of town centre management rest on urban revitalisation (e.g. Poland), the independent retail sector (e.g. Spain, Italy, France, Portugal), or place marketing and branding (e.g. Germany, The Netherlands). Innovative

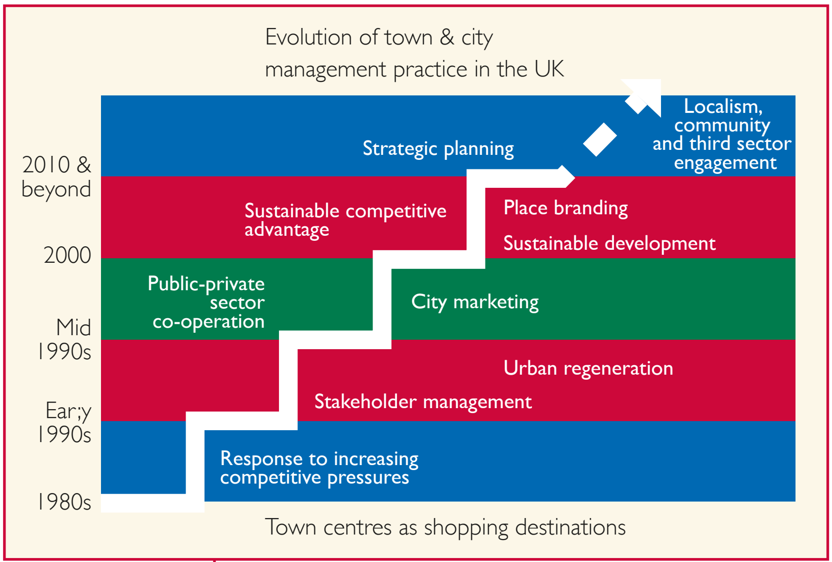

Figure 1. Evolution of town centre management practice in the UK[11]

approaches also abound, including the use of established keystones of the visitor economy such as tourism to fund town centre management in Austria. In the UK, this type of imaginative visioning is embryonic by comparison and rather limited in scope.

Similarly, in Sweden the commercial property sector has been a key stakeholder in town centre management for over 20 years. Paradoxically, it is only comparatively recently that a debate has gathered momentum in the UK on this front with specific reference to Business Improvement Districts (BIDs) as a private-sector led funding model for place management. This debate, which may have been triggered in part by the fallout of the economic crisis, has been granted additional impetus by ambitious plans for a major expansion of BIDs across London.

In spite of the continued institutional support for actively managed town centres in the UK, Germany, Italy, Spain, and North America, there remains a major gap in research evidence with regards to the relationship between actively managed town centres and the success of their interventions. Again, innovation on this front comes from overseas, with the southern Spanish region of Andalucía rendering institutional support (and public funding) for town centre management conditional to a comprehensive viability test enshrined in law – the first of its kind in Europe and a useful governance tool for public finances crippled by the economic crisis.

Regardless of how contested the issue of performance continues to be among practitioners and scholars alike, the debate over the ultimate value of town centre management initiatives is set to continue for years to come given its similarity to long-standing feuds over the true return on investment of marketing initiatives, urban regeneration projects, community events, festivals, or street art, to mention but a few examples from parallel spheres. This gap in our understanding of the effectiveness of town centre management as a mechanism to improve the competitiveness and liveability of town centres will remain a key area in urban research and should grow in importance as a priority for policy-making and Government funding.

Town centre competitiveness – from understanding of interactions to strategic positioning

Perhaps one of the reasons for the elusiveness of town centre performance as a clear cut concept rests in the complexity of interactions present in these managed urban ecosystems. As our understanding of these relationships between parameters improves with time so will, presumably, our ability to measure the effectiveness of managed interventions, including town centre management, urban regeneration, events, or destination marketing. However, the coarseness of the majority of existing town centre data is likely to remain a major barrier.

A recent study[13] commissioned by the Retail Unit of the Department for Business, Innovation and Skills (BIS) suggested a revolutionary, fine grained, community-led, street-by-street approach to data collection. The resulting DIY toolkit has since been adopted by a number of town centre partnerships across England. Its approach advocates the use of town centre management market intelligence and know-how to reposition town centres strategically based on their local personality or DNA using a long-term life cycle approach.

The strategic National Town Centre Performance Framework put forward by the aforementioned study – the UK's first performance framework for town centres to date – also represents a firm challenge to the town centre management profession. It advocates a more visionary approach to the management of town centres beyond the janitorial role that many professionals in this field were often associated with by some local authorities before the economic crisis. Similarly, it encourages a 24-hr holistic and service-centred post-crisis view of the city, with retail continuing to play an important though far less dominant role. Similarly, whilst encouraging town centre partnerships to adopt good practices from successful service-centred third places[14], the framework's multifaceted toolkit also serves as an effective safeguard against the turning of town centres into potential theme parks devoted solely to tourists and devoid of all authenticity[15].

Future challenges for the management of town centres

As town centre management practice continues to evolve in the future, it will be imperative for new management and funding models to foster entrepreneurship as well as social innovation. The continued blurring of the boundaries between the physical and the virtual (digital) worlds will help on this front, particularly in the sharing economy[16]. Modern manifestations of this concept, also known as peer-to-peer or collaborative economy, include car sharing and peer-to-peer accommodation (both common practices in the realm of sustainable events), peer-to-peer travel experiences, and the proliferation of websites such as letsbuyit.com. However, special care will need to be taken for towns and cities not to develop a dual personality syndrome where these two domains (digital and physical) overlap with coherent and integrated place branding strategies that take into account the fact that word of mouth through social media can be as effective today (if not more than) traditional word of mouth.

Similarly, events and festivals in town centres, which currently 85% of town centre managers are responsible for, will grow in importance as test beds for urban innovation and sustainability[17], social marketing, and entrepreneurship interventions, which can then be rolled out to wider catchment areas. Town centre management in all its forms and inceptions will continue to play a pivotal role here, though it may well be through job descriptions such as "community engagement manager" still unfamiliar to many UK-based town centre partnerships, even when they are commonplace in other European countries. Similarly, the development of hybrid forms of town centre management, including integrated (and networked) destination management with a stronger focus on the visitor economy, or online community management with a focus on people's virtual interactions with their town centres via social media, will continue to develop to address new manifestations of consumer behaviour. The growth of the circular economy as a post-crisis reaction – with its innovation-focused cradle-to-cradle lifecycle approach to re-use and recycling, as well as sustainable practices that avoid the generation of costly waste – and with growing support from the European Commission[18] will also challenge more traditional (linear) management approaches, which have largely dominated the way cities, businesses and governments have been managed in the past, with little regard for waste, energy efficiency or sustainable growth. It is not surprising, perhaps, that urban resilience and liveability are increasingly being considered beyond infrastructure and technology. In fact, the focus for smart and shared cities is shifting increasingly towards the development of strong relationships with key local stakeholders – a key feature of town centre management.

In 2013, the Grimsey Review provided one of the most damming assessments to date of the state of the UK's high streets. The report, which continues to be the focus of a great deal of debate[19], called on local authorities to act confidently and pro-actively to make high streets the centrepiece of their local economic vision. Unfortunately, the report fell short of arguing for town centre management to receive similar levels of attention. Given the number of existing town centre management schemes in the UK and elsewhere in the world, ignoring their (largely under-researched) contribution to the post-crisis survival and future sustainability of our town and city centres is a step in the wrong direction. Indeed, the words of J.F. Kennedy appear to be particularly poignant here: "We will neglect our cities to our peril, for in neglecting them we neglect the nation".

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7 The digital challenge for the high street: insights from Europe

Jesse Weltevreden

Introduction

For two decades policy makers, property owners, retailers, and academics, have been interested in the effects of the Internet for retailing, commercial real estate and shopping locations. At the time of the rise of the commercial Internet many futurists predicted that this process innovation would decrease the role of towns and shopping areas as a focal point for consumption and human interaction[1-3]. Despite the strong growth in online shopping and increasing competition from e-retailers, shopping areas are not yet obsolete. Nevertheless, as in the case of the UK, town centres in continental Europe have recently been perceived as being at risk. Here, we look at recent evidence from the Netherlands. Decreasing consumer spending and increasing vacancy rates of retail property adversely affect the viability of Dutch town centres as places for shopping. Between 2009 and 2014, retail vacancy rates in Dutch town centres increased from 6.0% to 8.9%[4] – lower than that of the UK but significant nonetheless. Additionally, within town centres retail property vacancy rates have varied considerably. The prime locations (high streets) have experienced relatively low vacancy rates (4.8%) whereas in secondary locations (side streets), vacancy rates have been higher ranging from 10.3% to 15.3% within 2014. Furthermore, the total number of retail premises (including vacant outlets) in town centres decreased by 3.1% between 2009 and 2014, despite, at a national level, an increase in both number of stores and floor space in the Netherlands[4].

The evolution of online shopping and Internet strategies of retailers

In order to survive, retailers continuously need to respond to changing consumer behaviour as a result of online shopping and other trends. This has been an evolutionary process. Since the emergence of the commercial Internet several stages can be discerned with regard to Internet use, retail strategy and impacts of online shopping on high street retailing.

1994-1999: The pioneering phase

The initial stage of commercial Internet access was characterised by the steady growth of personal computer (PC) use in Dutch households. However, no more than 16% of the Dutch population had a dial-up Internet connection at home. The majority of Internet users were connected to the Internet through a dial-up telephone line. The number of online shoppers in this period was negligible[5, 6]. During this period, it was primarily the larger retail chains and the mail-order companies that registered domain names and developed websites[7, 8]. Retail websites at this time were hardly elaborate and their content was limited. Up to 1999, the main source of home-shopping turnover for retailers came from other channels than the Internet, such as mail-order and telephone[9]. Adverse effects of the Internet on high street retailing were virtually non-existent.

1999–2004: Universal Internet access

The number of households with Internet access increased steadily during this period, due in part to the rapid rise in both commercial and free Internet providers. Within four years more than two-thirds of the Dutch population were able to access the Internet from their homes[10]. The period from 1999 to 2004 was also characterised by the emergence of broadband Internet, which was one of the reasons why consumers were no longer only using the Internet for e-mail and browsing, but also increasingly for other activities, including downloading software, music and files, online games, chatting, and Internet banking[9]. The turnover from other home-shopping channels such as mail-order and telephone peaked in this period (in 2001), followed by a steady decrease as a result of the growth of online shopping. The vast majority of the retail chains (80%) already had an active website and independent bricks-and-mortar retailers also began to discover the benefits of the Internet during this period[7, 8]. Also, the first e-retailers that seriously competed with bricks-and-mortar retailers were founded during this period. Bricks-and-mortar retailers increasingly used their websites to provide information about their products and services, to communicate with customers, and to offer them additional services[9]. The first signs of a negative impact of online shopping on high street retailing became apparent, starting with the noticeable decrease in the number of retailers in photographic goods, consumer electronics and travel agencies[4].

2004–2009: Expansion of online shopping and social media use

Between 2004 and 2009 the vast majority of consumers in the Netherlands (around 90%) acquired a broadband Internet connection at home. From 2004 onwards, 'online buyers' began to exceed Internet users who had never purchased products and services through the Internet[10]. This period was further characterised by a substantial increase in the number of e-retailers[11]. In particular, it was the smaller e-retailers that entered the market in this period – indeed the majority of the largest e-retailers in the Netherlands were established before 2005. The importance of other home-shopping channels such as mail-order and telephone continued to decline to the benefit of the Internet. Despite the increased competition from the Internet, bricks-and-mortar retailers responded predominantly passively. Less than one in five retail chains and no more than 6% of the independent retailers in the Netherlands had an online shop in 2006[12, 13]. Websites slowly became more interactive and retailers increasingly started to offer additional services through their website (for example, an online photo service or ordering personalised cakes). Finally, consumers in this period increasingly made use of social media, which did not go unnoticed by retailers. From 2007, therefore, there was also a rapid increase in the number of retailers using social media sites as customer-contact channels[11]. The number of stores in high impact retail sectors in town centres showed a further slow, but steady decrease[4]. In particular, retailers selling music and films began to feel the competition from the Internet during this period (Figure 1).

2009 to 2014: the Internet as fully-fledged sales channel and hyperconnectivity

Since 2009, evidence has accumulated of a decrease in the number of consumers accessing the Internet from a desktop PC from their homes, while the use of other (mobile) devices used by consumers to access the Internet has significantly increased[10]. In 2012, for the first time, more Dutch people were accessing the Internet on a laptop than on a desktop PC. Furthermore, the number of consumers accessing the Internet on a smartphone rose exponentially, from 28% in 2009 to 72% in 2013[10]. The use of social media and the collecting of information about products and services, as well as the purchasing of these online, are among the most important activities of consumers on the Internet[9]. In 2011, the Internet surpassed the physical store as the most used and decisive channel for familiarising oneself with products and services[14]. Furthermore, the Internet almost completely replaced the home-shopping channels of mail-order and telephone. The number of bricks-and-mortar retailers using the Internet for selling products and services has grown significantly since 2009. By mid-2012 60% of the retail chains were active with e-commerce[8, 13]. The number of independent retailers with a transactional website also increased, although less quickly than the retail chains. Between 2009 and 2014 the Internet has become a fully-fledged sales channel and indispensable to many retailers. Retailers that are insufficiently represented on the Internet and are unable to differentiate themselves from the competition in price, range of products or services are finding it increasingly difficult to make a profit. This holds for both chain retailers and independents[9]. In town centres, the number of retail outlets in high impact categories decreased more rapidly since 2009 than in the preceding periods with increasing vacancy rates for commercial real estate as a visible result (Figure 1).

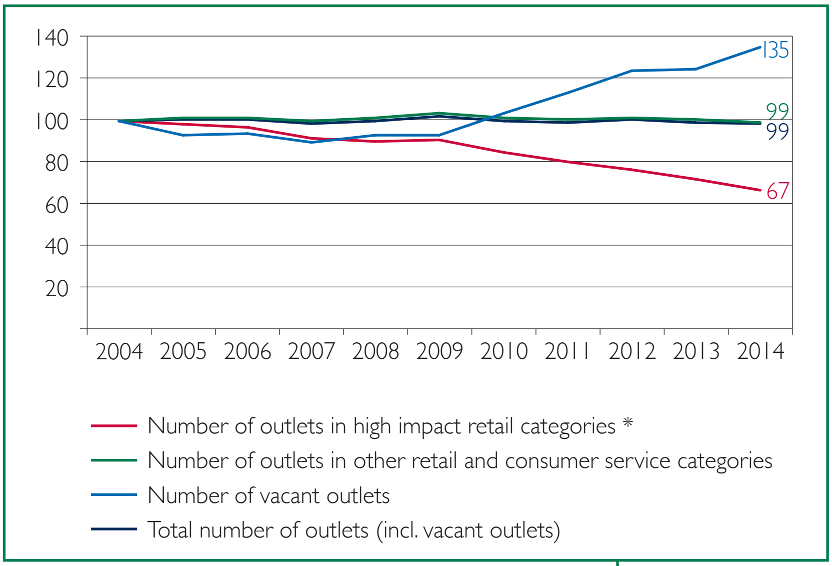

Figure 1. Development of the number of retail outlets in Dutch town centres between January 2004 and January 2014 (2004 = 100)

* High impact categories include books, computer hard & software, consumer electronics, erotica, financial products, music & films, photographic goods and travel (excluding telecom outlets which grew with 150% between 2004 and 2014 at town centres as a result of the increasing demand for smartphones and accessories).

Source. Locatus (2014)

The future of high street retailing in the Internet era

What will be the impact of the Internet on high street retailing in the (near) future? Will the Internet, and in particular the continuous growth in online shopping, finally make high street retailing obsolete as futurists predicted two decades ago? Or will town centres continue to thrive as places for consumption?

What can be learned from looking at the past is that the changes have not taken place quite as quickly as futurists first predicted, but at the same time still quicker than sceptics expected. Physical stores, for example, have still not become superfluous almost two decades after the emergence of the Internet. And although online shopping has taken off in the Netherlands, online turnover today is only about one-tenth of total retail sales, which implies that some 90% is still realised through physical stores. At the same time, the Internet has had a huge impact on certain high street sectors, which has resulted in a substantial decrease in the number of stores in these sectors over the past decade (Figure 1). And although the decrease in the number of stores in certain high street sectors has almost always been compensated by a growth in the number of shops in other sectors, this has become much more difficult today, due in part to the influence of other factors such as the shockwave of the economic crisis, high commercial rents and increased competition from other shopping locations.

However, after two decades of increased competition, there are currently noticeable signs that the high street may benefit from future developments that are driven by the Internet. First, the coming years will be characterised by an increased use of various online customer-contact channels and devices for Internet access. As a result, consumer demand will also increase for a uniform and integrated shopping experience that is independent of the channels and media that consumers use in the purchasing process. And through the growing use of – among other things – mobile Internet, the physical and virtual worlds will become increasingly interwoven. New technologies such as 3D images, holograms and augmented reality will provide opportunities to present products and services in an interactive way without the need to have the full product range in store (including digital fitting rooms and dressing mirrors). This may enhance the in-store shopping experience[15]. And through smart sensors such as Apple's iBeacon high street retailers will be able to monitor in-store customer behaviour and anticipate it with personalised offers and promotions. The extent to which retailers in general and independent retailers in particular will be able to capitalise on these technological trends remains in question. In general, independent retailers have considerably more difficulty adopting new Internet technologies and customer-contact channels than the larger (online) retailers[9]. As such, collaboration in the area of online and in-store marketing may become of vital importance for the survival of independent high street retailers. As a result, in recent years the first collective marketing initiatives in Dutch town centres have begun to emerge, ranging from informative mobile applications and collective loyalty cards/programs to collective webshops.

Figure 2. The interior of BOQZ, an innovative shop-in-shop concept in the town centre of Eindhoven that rents shelf space (274 boxes) to e-retailers and other types of firms for a fixed amount per month

Source. Maurice Steenbergen (BOQZ)

Second, the distinction between brick-and-mortar retailers and e-retailers is likely to diminish. In the recent past many of the former have embraced the Internet as an additional sales channel to their physical stores. More recently, e-retailers have become interested in establishing a physical presence in addition to their online operations. In the Netherlands, more than two-thirds of the e-retailers are interested in opening a (temporary) physical store or a shop-in-shop, and already one in five have actually done this in the past[16]. About 25% of the e-retailers have seriously considered an offline presence – and we note a recent study by Royal Mail Group which also confirms this trend for the UK[17].

Some e-retailers have a strong preference for town centres as a location for their physical store. Within town centres e-retailers favour both high street and side street locations depending on the type of store they plan to open – in the case of permanent stores, they seem to prefer side street locations, and in the case of pop-up stores and shop-in-shops they prefer both high street and side street locations. This has much to do with the trade-off between footfall, visibility and costs[16]. Further, some e-retailers have a strong preference for opening a specific type of store at one particular type of location, while others are interested in various sorts of physical outlets and retail locations. This largely depends on both the characteristics of e-retailers and the concreteness of their plans for opening a (temporary) physical store.

From this evidence, it can be concluded that e-retailers today not only pose a threat to high street retailers but potentially a partial solution for the growing number of vacant outlets in town centres. So far, it appears that property owners and real estate agents in the Netherlands have struggled to facilitate the particular needs of e-retailers in their search for suitable temporary stores, in particular with regard to flexible contracts, rent terms, and rates. However this provides opportunities for traditional high street retailers to potentially divest some of their costs by renting out shelf or floor space in their store to e-retailers, they can finance a portion of their own (fixed) costs.

Conclusion

After two decades of Internet use and increasing substitution effects of online shopping on retail property in town centres, we are likely to move towards a phase in which the distinction between the online and offline world diminishes through new Internet technologies that will enhance the attractiveness of physical stores and the discovery by e-retailers of the value of physical consumption spaces in general and town centres in particular. The increasing demand for retail property from e-retailers and other types of firm such as artists and designers also fosters the growth of new retail concepts in town centres such as pop-up stores and innovative shop-in-shop concepts (Figure 2). As such, to a greater extent than in the past, Internet based firms and technologies are currently able to and also will contribute to the viability of the high street. However, this does not necessarily imply a bright future for all high street retailers. If the current development of online shopping continues, experts expect that some 25% of total retail sales will be generated from the Internet in ten years' time[18]. This means that the substitution effects of the Internet on (some) bricks-and-mortar retail trade could be much greater in the coming decade. This holds especially for non-food retail categories[18].

The Internet, however, has not been the only factor that affects the viability of town centres in the Netherlands and elsewhere in continental Europe. The economic crisis, rising rents, demographic changes, and competition from out-of-town shopping locations have also played a major role. The fact that both the number of stores and floor space in the Netherlands are still increasing while total retail sales have been decreasing over the past five years[4, 10] may pose an even greater challenge to high street retailers in the Netherlands than online shopping. As such, the digital challenge for the high street should be viewed in a broader perspective as the Internet is just one of the structural forces that shape the future of town centres as consumption spaces.

The growth of retail space in the Netherlands in an era of increasing Internet retailing, leads to a pressing need for an integrated retail vision at a local level. Such a vision should include redevelopment plans for retail property and shopping streets but also provide sufficient opportunities for new retail concepts to be incorporated at existing retail locations, and simultaneously limit the growth of retail activities outside shopping locations. Cooperation between property owners, local government, city marketing organisations, shopkeepers' associations, and high street retailers is crucial in order to create town centres that meet both the needs of consumers that increasingly use the Internet for shopping and the growing demands for temporary retail space of e-retailers and other businesses[19]. A clear retail vision and cooperation between actors at the local level is essential for town centres to adjust to online shopping in the near future, and to benefit from the new business opportunities provided by the Internet.

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8 The consumer journey through the high street in the digital era

Cathy Hart and Angus Laing

Introduction

Following the economic crash of 2008, increasing store vacancies, along with a shifting retail mix, have changed UK consumers' perceptions and image of the high street, in some cases irretrievably, reducing the attractiveness of the shopping location. As a result, many high streets are becoming increasingly focused on entertainment, leisure, services, and social activity – reinforcing a trend which has been apparent for some time. Additionally, as consumer confidence has improved, town centres have recovered differentially suggesting that shoppers have switched their behaviour in favour of online retailing[1].

Various macro and micro factors influence high street performance, and yet the consumer demand related factors driving town centre attractiveness are the least understood or monitored. In 2013, the High Street Minister warned UK high streets that to prosper in an era of online shopping they must adapt to meet the changing needs of today's consumers and the changing way in which consumers shop. If consumers' behaviour, perceptions, and motivations towards town centres have changed, then there is need to capture, understand, and monitor this consumer insight in order to drive high street policy and support town centre strategy at the local level.

Town centres are complex entities, evolving organically to encompass an eclectic mix of retailing, public services, markets, and events. Managing town centres is more challenging than purpose-built shopping malls, with contained boundaries and a coordinated retail tenant mix. Consumer behaviour is more complex in this mixed use environment, and needs a wider approach in terms of assessment. The rapid growth of digital and mobile technology has revolutionised shopping behaviour, affecting consumers' physical interactions with the high street. Recognising that consumers now interact with a diverse range of services, technologies, activities, and communities in their high street, calls for a more "holistic" approach to assess the total high street experience.

Town centre consumers

The customer experience involves consumers' interactions with physical, social, and experiential elements within multiple retail channels[2]. However, do customer experiences of town centres work in a similar or different way to their experiences of retail stores or service environments? Research suggests consumers evaluate town centres using a broader range of psychological, intangible variables than typically assumed[3]. Town centre environments involve complex choices between locations, access, routes, parking, stores, and brands. Seeking to simplify the task, consumers subconsciously create 'global impressions' of town centres and use these positive or negative impressions to make an overall judgement of each centre. These perceptions influence their future expectations, experiences, and decisions to revisit a town.

A key challenge is capturing the wide-ranging customer perceptions and experiences in a town centre environment. In an Economic and Social Research Council (ESRC) funded study, partnered by high street stakeholders Argos, Boots, the British Retail Consortium, and the Association of Convenience Stores, Loughborough University is investigating the customer experience of town centres. An innovative 3-stage research study examined consumers' behaviour and interactions within six town centres. In a consumer tracking study, respondents logged all high street interactions and every shopping activity whether offline or online during a 4-week period. Additionally, by reporting any positive and negative critical incidents occurring each week, respondents revealed the memorable interactions or touch points, delivered during these town centre experiences. Collecting and analysing such a wide range and depth of consumer data creates a more comprehensive picture of customer experiences within the changing town centre landscape.

Consumer touch points

Town centre experiences involve all customer interactions with a town centre offering from the marketing, access to, and movement within the centre through to the outcome of that visit. Core to this experience is the consumer journey, which includes a series of touch points or memorable interactions[4]. Touch points are the key points of customer interaction with a town centre, whether digital communication or human and physical contact. How do consumer touch points translate in the town centre environment? Town centre journeys include a combination of both functional and experiential touch points. Functional touch points satisfy the practical purposes of the visit, such as the range of stores, convenience, and efficiency of access and parking. Usually the majority of visits to a town centre are for reasons of convenience, so these touch points are vital to attract consumers and fulfill the utility of their shopping visit.

Experiential touch points engage the customer's sensations, feelings, and emotions, including the softer intangible aspects such as social interactions with sales staff or other shoppers, special events, picking up bargains, using cafes and bars. Customer service interactions generated almost a third of all critical incidents reported by the consumers and therefore can be considered a fundamental element of the customer experience (see Table 1).

Importantly, the functional touch points in town centres generated more negative incidents than positive ones. Yet the experiential touch points generated more than double the number of positive than negative comments, suggesting that greater social interactions create positive attitudes towards the town centre. As a result, the quality of the softer elements within town centre experiences can significantly enhance consumer perceptions, leading to greater enjoyment, encouraging repeat visits.

Town centre journeys

Town centres remain consumers' most visited shopping destination, particularly for fashion and clothing. Once in the town, 60% of journeys are habitual with consumers rarely straying from their regular routes. Influenced by the location of car parking or public transport, these routes often concentrate on a few familiar stores. Time constraints and factors, such as weather, limit the perceived distances walked, resulting in concentrated activity in the primary shopping area of the town centre. While consumers value the diversity provided by independent stores, these are visited infrequently due to their secondary locations. Consumers have limited awareness of what other products and brands are available in stores outside of their habitual routes and need reminding and updating of the wider offer, to change their habitual behaviour.

The customer experience journey involves both physical and virtual interactions across multiple channels. If online shopping has changed consumer behaviour, to what extent is online activity and digital replacing or enhancing the physical shopping experience? How can digital shape consumer journeys in town centres? Product related searches are currently the main online activity prior to town centre visits, followed by price comparison, checking product availability and click and collect. Mobile use during town centre visits also includes price comparisons, followed by texting/ phone calls, and social media, and using a variety of apps. Reported online purchasing during visits to

Table 1.
Incidence of positive and negative touch points

Source.
Hart *et al.* (2014) The customer experience of town centres: ESRC Project Report.

Functional touch points	No of positive incidents	No of negative incidents	Total no of incidents	% of all incidents (n = 1007)
Stores / products	55	101	156	15
Access / layout	58	41	99	10
Parking	30	46	76	8
Information	3	5	8	1
Totals	**146**	**193**	**339**	**34**

Experiential touch points	No of positive incidents	No of negative incidents	Total no of incidents	% of all incidents (n = 1007)
Customer service	197	118	315	31
Social interactions	72	41	113	11
Savings / bargains	97	15	112	11
Special events	41	1	42	4
Refreshments / eating out	30	9	39	4
Atmosphere	12	15	27	3
Markets	12	8	20	2
Totals	**461**	**207**	**668**	**66**

town centres is minimal, but showrooming, viewing the product in the town centre and then purchasing online, is undertaken by 57% of respondents. 41% of respondents admit they shop in town centres less often because of an online alternative[5].

While consumers increasingly shop online, the role of digital in the town centre experience is underdeveloped. For many towns, searching for physical stores, getting directions, and checking information on latest events and activities, involves navigating a range of websites, while awareness and usage of town centre websites is low. Observers speculate about the 'digital high street'[6] but this currently translates to a series of experiences with individual retailers. Consumers expect a seamless town centre experience across channels, much in the same way as shopping in a department store. Digital platforms and social media could be exploited further to attract and direct customers to the priority functional and experiential touch points for each town centre. However, there is still the issue of who should manage this and how. Any new business model must be sustainable to safeguard the future viability of town centres.

The value of the experience

High streets typically focus on consumer interactions with the physical, tangible aspects of town centres such as parking and access, while consumers' reasons for revisiting town centres extend beyond purely functional outcomes, to include satisfaction, emotions, and enjoyment. If satisfaction is the net result of good minus bad experiences, then to achieve this high streets must understand the nature of those experiences, whether positive or negative[7]. Customers prefer the convenience of shopping in their local town centre but key dissatisfiers are lack of choice of products, items unavailable, or out of stock. For customers to return, retailers and town centre management need to ensure consumers fulfill the primary function of their shopping trips, otherwise consumers have little alternative but to switch to competing centres or online shopping.

This is illustrated by the fact that consumers spend approximately the same average amount per town centre visit as they spend online (£55.86 versus £56.61). Yet online visits account for only 13% of consumers' overall shopping activity and typically for a shorter duration[8]. The projected growth of online shopping suggests that it will replace more of the physical shopping activity[9], so how can the high street add value to the customer experience? Experiential touch points of the customer journey, particularly social interactions, visits to cafes and restaurants, and atmosphere, add value in terms of spend and dwell time. Significantly, consumers who shop in town centres with family and friends spend up to 50% more than those who shop alone. Similarly, shoppers visiting cafes and restaurants spend more money and dwell time per average town centre trip compared to those who do not use refreshments[10]. Importantly, consumers are less likely to shop on the Internet and showroom if they have higher levels of satisfaction, receive good customer service, and have an enjoyable social experience when visiting the town centre.

Comparing consumer perceptions for different town centres shows that the larger towns perform better than smaller towns for functional touch points, possibly due to their wider offer and infrastructure providing greater convenience for customers. The smaller town centres outperformed the larger towns on the experiential touch points. This suggests future opportunities for smaller centres to use the positive, experiential elements of their customers' experiences, to develop a distinct identity in order to attract more local shoppers.

How can consumer evidence help drive future high street performance?

Identifying touch points in consumers' town centre journeys suggests three areas for action if town centres are to use consumer insights to increase footfall and consumer spend:

1. **Measuring touch points to guide local response**
   What is the relationship between touch points and how can town centres measure the customer experience journey? There is need to quantify the relative importance of each touch point for consumers for different types of experiences. This knowledge would inform towns of their priority touch points, guide their local response, and measure change in consumers' experiences over time. Understanding the value of experiential touch points to their local market segments, would then help create distinctive customer experiences. For example, how does the social environment and the way consumers interact in groups impact the bottom line for town centre performance?[11]

2. **The collective components of customer experience**
   Few retail stores exist in isolation and the success of each store is dependent upon the overall attraction of the high street. Thus, collective components of the customer experience have direct relevance to retailers, and their reciprocal role in driving the total experience. Unlike out of town shopping malls, town centre experiences stretch across wider, physical locations and are harder to manage and control. How can retailers, local authorities,

town centre management, and other high street stakeholders collaborate to shape the customer experience? The primary reason for visiting the town centre is usually retail therefore retailers are key to delivering the experience and improving negative aspects of functional touch points while maintaining the positive elements identified by customers.

3. **Influence of prior experiences on future shopping behaviour**
   Prior consumer experiences will influence future experiences and consumer perceptions play an important role in driving town centre attractiveness and performance. Yet centre attractiveness rankings exclude this consumer dimension, relying on aggregate quantitative measures such as catchment and footfall to predict shopping behaviour. Isolated measures of customer activity on the high street will not explain the reasons why consumers no longer visit that location. Nor will they indicate the potential for that town to attract future customers, or to attract innovative and diverse retail, leisure, and entertainment offerings that will improve town centre viability and vitality[12]. Incorporating consumer dimensions with high street performance metrics could facilitate experience driven rankings of town centres.

Conclusion

Using digital technologies to provide the missing link between functional and experiential touch points is an obvious first step towards an integrated, seamless consumer journey on the high street. Yet, as mobile operators seek to transform consumer journeys using m-commerce[13], is there an optimum level of digital interaction in-town? One size may not fit all high streets as some people attach higher value to the human physical interactions of the town centre journey. Solutions need to be designed to fit the consumer rather than pushing technology innovations into high streets[14]. Analysing consumers' end-to-end town centre journeys, together with online and offline consumer data will help build a more detailed picture of high street experiences. This then facilitates faster, more personalised retail and service responses to changing consumer behaviour, resulting in a more tailored town centre experience.

A shifting demographic and ageing population will mean some town centres need to specialise in, or cater to, a wider range of consumer journeys[15]. Accordingly, town management partnerships will need to get closer to their customer groups, to understand their motivations for revisiting their high street, whether functional or experiential, and to use this insight to design and deliver better experiences. Managing these experiences will require a coordinated approach across retail, leisure, and service providers, underpinned by local authorities and town centre management. Consumers and local communities, as users, will also need to be part of the feedback process if high streets are to adapt and respond to the changing consumer.

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14. http://www.computerweekly.com/feature/High-street-stores-embrace-digital-to-entice-customers
15. For example: www.experian.co.uk/assets/business-strategies/white-papers/town-centre-futures-whitepaper.pdf

9 The e-resilience of UK town centres

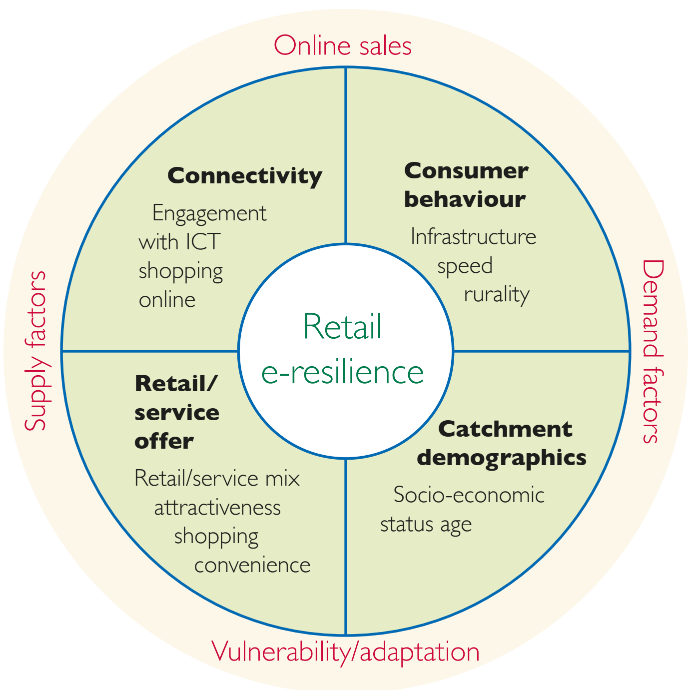
Alex Singleton and Les Dolega

The concept of resilience has been established in physical, engineering, and ecological sciences for some time to describe how various types of system respond to unexpected shocks. However, more recently, 'the intersection of an economic crisis and an environmental crisis has enhanced the perceived sense of vulnerability and, hence, stimulated the search for new paths to resilience'[1]. Indeed, the concept of resilience has attracted the attention of increasing numbers of social scientists from a wide range of disciplines[1, 2, 3, 4, 5] to help describe the impacts and response to disruptions and more gradual processes of change in a range of socio-economic systems. Essentially, interest has focused on the capacity of local economic systems to recover from an external shock, what Hassink[3] describes as 'one of the most intriguing questions in economic geography ... why some regional economies manage to renew themselves, whereas others remain locked in decline'.

Resilience was first considered in the context of the UK high street crisis by Wrigley and Dolega[6] who investigated the dynamics of performance and adjustment to the shock of the global economic crisis and other forces of change. In this work, the notion that town centres and high streets could bounce back to their pre-shock configurations was rejected and the concept of 'adaptive resilience' was developed whereby the resilience of UK town centres was viewed as a dynamic and evolutionary process.

The aftermath of the economic crisis, alongside rising Internet sales and a shifting of consumer culture towards convenience and value are widely considered to be key disruptions that are impacting the fragile ecologies of UK retail centres, and are driving their evolutionary reorganisation. Indeed, such effects were recognised by the Government's independent review of town centre performance[7], and since then have been at the heart of the debate on the future of UK high streets.

Figure 1. A conceptual map of e-resilience



The concept of retail e-resilience

The rapid growth of online sales have impacted UK town centres in complex ways and can be viewed as a source of long-term change to their structure, what is sometimes referred to as a 'slow burn'[2]. There is a growing body of empirical evidence that explores the nature and extent of such impacts; however, these issues are difficult to measure as they are complex and multidimensional.

The basic concept of e-resilience defines the vulnerability of British retail centres to the effects of rapidly growing Internet sales, and estimates the likelihood that their existing infrastructure, functions, and ownership will govern the extent to which they can adapt to or accommodate these changes. Essentially, e-resilience is about the balance between the extent that retail centres are exposed both to consumers who are heavily engaged with information and communication technologies alongside the virtual retail channels that these enable, and the retail mix, that might enhance or constrain these effects, as not all retail categories would be equally impacted.

The concept of e-resilience adds value in the following ways:

- it provides insight into a wider debate on the performance of UK town centres, in particular by assessing their resilience to the growing impact of online sales. Moreover, examination of how the resistance of retail centres to the long-term impact of Internet can be measured, and what role local demographics may have in that context can be viewed as both novel and policy significant.

- it positions focus on the demand side, namely examination of local catchment demographics. This rebalances the current debate on the resilience of high streets which has predominantly concentrated on supply side composition or outcomes in terms of vacancy rates.
- it provides valuable outputs including an operational measure of e-resilience, characteristics of retail centres which are the most e-resilient, and a comprehensive classification of all centres on the basis of e-resilience. It can be anticipated that these outputs will be used by a wide range of stakeholders.

A framework for understanding and measuring e-resilience

Measuring the e-resilience of retail centres requires an array of knowledge about the characteristics and mix of retail and other offerings, alongside demographic information about likely consumers and their associated behaviour in relation to use and engagement with the Internet (see Figure 1). Empirical models must ensure that both supply and demand influences can be captured, and consideration is required about how such interactions map onto retail centre catchment area extents. Such complexities are illustrated in the following example.

A retail centre that could be considered as more e-resilient might comprise a thriving local centre/ shopping parade within an affluent suburban area, and featuring a healthy mix of mostly independent convenience retailers and service providers. Within such a context, there would be a series of interacting factors that influence the levels of e-resilience. Given the urban location, consumers drawn from the retail catchment area might typically be well serviced by Internet connectivity infrastructure, and given the affluent local population, Internet use and engagement levels would more likely be high. However, although such demographic and infrastructure characteristics might be considered to reduce e-resilience, the type of local retailing offer is one that would not typically be easy to replicate online. For example, a higher proportion of services such as leisure, health & beauty, or food retailing may favour physical locations that provide store experience, and where goods can be inspected.

The analysis of e-resilience comprises multiple stages. The first requires an understanding of the location, demographics and probable online shopping behaviours of potential consumers. One potential framework to understand this geography includes geodemographic classifications, which are commonly used in retail analysis to segment areas into groups where residents would likely be expected to express different consumption characteristics. Such methods have specific demonstrated utility in mapping engagement with information communication technologies[8].

Second, a definition is required of retail centres and estimation of their catchment areas relative to their location, form, and competing destinations. A widely-accepted measure of retail area extents was developed out of work funded by the Office of the Deputy Prime Minister in the late 1990 and early 2000s[9]. This technique was later employed by Department for Communities and Local Government (DCLG) to derive a set of retail centre zones that were used to form a database of information featured in the State of the Cities Report (http://goo.gl/mtX1aB). These boundaries provide a systematic estimate of where the main concentrations of shops are found within different locations, although do not illustrate those places from which the consumers attracted to these destinations would likely be drawn, and as such, a method of estimating a catchment areas for each retail centre is needed. There are numerous ways in which catchment areas can be estimated, ranging from the geographic extent that people might be willing to travel to a retail centre, through to more complex mathematical models that are calibrated on the basis of how attractive different retail opportunities are to consumers living in different places. In such models there is an assumption that larger towns with more compelling retail and leisure offerings are more attractive, but these effects decline with distance. An important consideration for these models is the assessment of how attractiveness of different retail centres can be estimated, and what attributes this should include? There are a range of potential factors that can be incorporated into such measures including the economic health of a centre, the type and mix of retailers, the size of the retail space, and how retail centres nest within local or national hierarchies.

Finally, the intersection and interaction between these supply and demand geographies requires consideration, assembling these within a geographic information system for wider integration.

Internet use and engagement

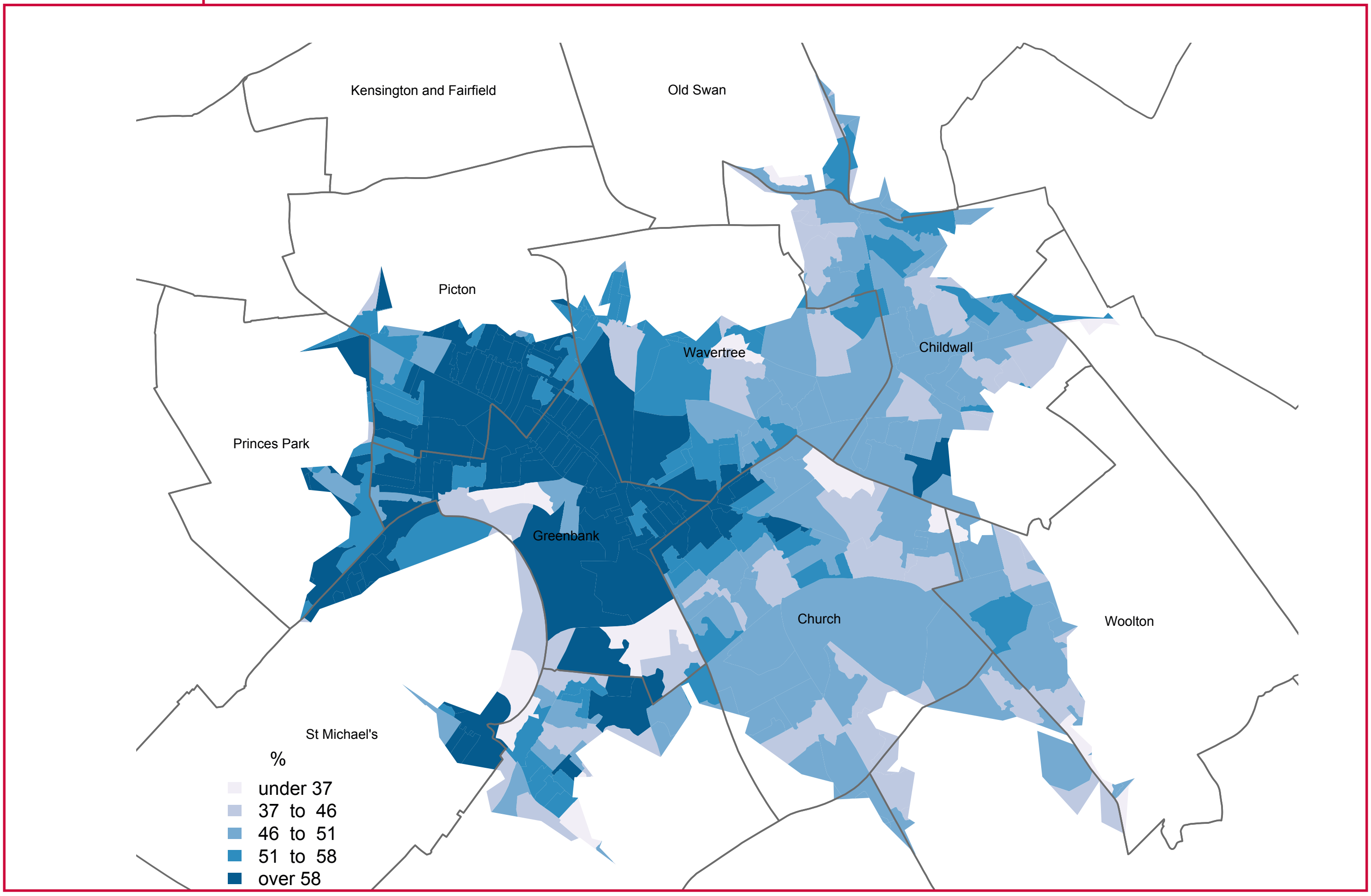
A number of dimensions condition the spatial variability in patterns of user engagement with information and communications technologies (ICT) and the Internet including connectivity, behaviours, demography and context (See Figure 1). Connectivity relates to the underlying infrastructure that is available within an area (fixed and mobile) to facilitate users getting online. A behavioural component captures the decision whether or not to use the Internet for a given activity, over any of a number of modes of access. Influencing such decisions are both demographic effects such as age, and also, contextual factors, such as rurality, education, or local retail supply.

Connectivity options differ across space and take on a variety of forms. For example, the availability and speed of fixed line broadband connectivity is a function of the distance between a property and the nearest telephone exchange[10], and as such, access to the highest speeds and the opportunities that such connections provide are not available to everybody. This is illustrated by an analysis of around six million postcode level Internet speed test results supplied by the website (www.speedchecker.co.uk). Riddlesden and Singleton[11] illustrate how urban areas will typically demonstrate the highest access speeds, although, between urban and rural areas, there are variable patterns of inequality which are layered by interesting temporal effects, where time of day can have a large impact upon decline from peak levels of service.

Although the Economic and Social Research Council (ESRC) Understanding Society Survey (www.esrc.ac.uk/research/surveys/understandingsociety.aspx) contains questions about Internet use, a more detailed survey on behaviours in this area are found within the Oxford Internet Institute Survey (http://microsites.oii.ox.ac.uk/oxis/) provided by the University of Oxford. This survey has been run every two years since 2003, and provides a useful national barometer of changing Internet consumption behaviours. Through small area modelling techniques it is possible to derive estimates of the survey responses for small area geography, as illustrated in Figure 2. This shows how within a short drive time catchment of a shopping area in South Liverpool, there are very different Internet usage patterns.

A third component that defines potential e-resilience are the demographics of the relevant retail catchment area. The Office for National Statistics (2013) implied that different age groups get engaged with Internet activities in various ways. For instance, the youngest group (age 16 to 24) were most likely to focus on social networking, whilst the middle groups (age 25 to 34, and 35 to 44) used the Internet for a wider range of activities including online banking, travelling and selling goods.

Figure 2. The proportion of people who access the Internet while travelling within a 5 minute drive time of the Allerton Road retail centre, Liverpool



Conclusion

In this contribution we have introduced and defined the concept of e-resilience and discussed how this complements an increasing interest in the topic of resilience across the social sciences. Measuring the e-resilience of retail centres requires knowledge about multiple attributes of supply (including attributes of the retailer location, mix and vitality), and also demand by potential users of these centres and the way that is mediated by exposure and access to the Internet. Modelling such interacting patterns is complex and multidimensional, and a framework for this analysis was proposed through integration of catchment area analysis and geodemographic modelling. A key constraint for this work is ensuring that measures relevant to e-resilience can be captured from a variety of sources, and assembled into databases enabling their interrogation. However, such constraints are beginning to be overcome. The centre aims to collaborate with the key retail sector stakeholders in order to identify the establishment of the Consumer Data Research Centre as a collaboration between University College London, the University of Leeds, University of Liverpool and University of Oxford. This centre aims to collaborate with the retail industry in order to identify commonalties of interest in the use and deployment of big data, and is likely to capture many of the inputs outlined here.

We have presented e-resilience here as a valuable conceptual and operational tool that will assist stakeholders in their understanding about the nature and extent of the impact that the Internet is having, and will have, on UK retail centres. We argue that big and open information bases are critical to effective decision making in this area and to evidence-led policy that will ensure the greatest positive impact.

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10 Data constraints and the high street crisis

Serena Page

Introduction

Data constraints have played a large part in understanding how the high street crisis has unfolded, and "the lack of an agreed statistical base only accentuates the potential for further confusion and fuels further unsubstantiated debate[1]". What has resulted is an uneven playing field in terms of access to data, based on the commercial nature of town centre intelligence as a commodity in its own right, and a tendency for factoids and assumptions to dominate understanding of high street change.

Data sources

To explore the inputs of data into the understanding of high streets, this contribution distinguishes between three different types of data sources. The first is private data that is owned, controlled, and proprietary due to commercial sensitivity and data protection, for example data collected by retailers. The second category of data is commercial data that is collected by private sector companies and sold for commercial profit. Commercial data is available to anyone provided that they can afford to invest, for example, data collected by Experian GOAD (discussed further in Table 2). The final data type has for the purpose of this article been termed 'open data'. Open data is publically accessible in an open format for free, under a licence that allows for use and redistribution. The last of these categories is important to spatial planning, as the information is restricted only by the ability of the user to interpret the data.

The demise of open data and rise of commercial data

The majority of the data of relevance to the understanding of the current high street crisis is commercial data. It is worth highlighting how this came to be, by reference to the demise of open data sources for retailing. The principal source of open retail data in the UK has historically been the census of distribution. The census was undertaken on a full scale every ten years, the last one in 1971, with an intervening sample census on a five year basis. The retail census data allowed for analysis of retail organisations both across time and space, and also allowed for international comparisons to be made. Importantly the census provided the baseline through which government regulation could be assessed. After 1971, the collection of data in respect of retailers diminished, which has been considered as "a disaster for local authority planners, retailers, developers and academics alike[2]."

In 1981 a 'Shops Inquiry' was due to take place, however, it was cancelled prior to the wider curtailment

Table 1. Typologies of data

	Private data	Commercial data	Open data
Access restrictions	• Membership/ affiliation to collecting organisation	• Ability to pay for data	• Few restrictions, mostly technological
Example sources	• Loyalty card data • Customer surveys • Transaction data	• Local Data Company and Experian GOAD (retail occupier data) • Experian and MapInfo (expenditure and demographic data) • PMRS (town centre footfall data) • CACI (consumer insight data) • Mintel Retail Rankings (company average sales densities)	• Census data (population data and population projections) • Office of National Statistics (aggregate retail statistics), Retail Sales Index (aggregated data on economic performance), Valuation Office Agency (limited floorspace information and rents) • Council surveys.
Usage for town planning policies	• Occasionally referenced within representations to Government i.e. the proposed introduction of a competition test • Sometimes used at Planning Inquiries to support a case and within planning applications.	• Used to inform the preparation of Local Plan evidence base • Used to produce technical documents to support planning applications • Used to support understanding of town centres at the national level.	• Limited use within retail impact assessment exercises – predominantly associated with catchment area analysis in respect of demographic change • Rarely quoted in evidence cited as informing Government Policy.

of government statistics. In the latter half of the 1990s a project was commissioned by the then Department of the Environment Transport and Regions (DETR) and subsequently continued by the Office of the Deputy Prime Minster (ODPM) to estimate floorspace, rateable values, employment, and retail sales in certain town centres in England and Wales (DETR 1998). In 2004, this line of work was extended by the Centre for Advanced Spatial Analysis (CASA) at University College London (UCL) that undertook a project which sought to compare the 1971 Census of Distribution with the ODPM town centre data, the purpose of which was to provide a means of measuring changes which had affected the retail economy of greater London over a 30-year period.

Following the CASA pilot, the Department of Communities and Local Government (DCLG) commissioned a geographic information system (GIS) project to define the boundaries and apply the statistical model to the rest of England and Wales in order to create defined areas of town centre activity, allowing for comparisons across time and space to be made. The National Retail Planning Forum (NRPF) sponsored the development of a website to contain the boundaries and statistics for the data relating to years 1999 to 2004 and made data available on employment, net internal floorspace, and rateable values. However, the use of this data for town planning purposes was limited as a consequence of the newly created boundaries, which did not relate well to defined town centre boundaries within Local Plans. Furthermore, continuity of open source data provision has been an issue owing to funding restrictions and data issues, therefore this open access data source was short-lived. At the time of writing, the most current open source statistics available are statistics published in 2012 by the Valuation Office Agency, which provide experimental business floorspace statistics, including retail, at local authority level covering the years 2000-2012. In summary, after a number of failed attempts to revive open data statistics, at the entry to the retail crisis there had been a period of over 30 years whereby access to open data in respect of high streets was extremely limited.

In contrast, and in parallel to the decline of open data, commercial data and private data began to increase in importance. For the large retailers, particularly grocery retailers, the ability to draw on point-of sale and loyalty data led to the development of very large data sets. In combination with technological advances allowing for customer survey data to be linked to demographic and spatial data, major retailers were able to better analyse their customers. Commercial data of a variety of types emerged to provide and interpret data. Many new data sources relied on the rise of new GIS technologies. Retailers supplement their own private data collection with commercial data providers,

Table 2. Comparison of statistical sources informing groceries market inquiry

	Office of National Statistics (ONS) – Interdepartmental Business Register	GOAD	Institute of Grocery Distribution (IGD)
Data type	• Open	• Commercial	• Commercial
Use of data	• Competition Commission	• Competition Commission and University of Southampton	• Association of Convenience Stores.
Method of data collection	• Sample survey of firms on register to obtain an estimate of outlet numbers	• On-the ground observations, noting fascia name and estimate of activity type, • Consistent mode of data collection.	• Telephone interviews, volunteer information and information obtained from third parties
Geographic coverage	• All parts of economy • Misses some very small retailers with low turnover & few employees	• Limited coverage of smaller high streets and shopping parades relevant for the convenience shopping sector, where substantial proportion falls outside scope of GOAD • Expansion and contraction of boundaries of data collection between years	• Sector analysis • No reference to town centre boundary or centre definitions
Summary of findings pertinent to CC inquiry	• Churn in the grocery sector • Overall growth found	• Churn in the grocery sector • Overall growth found	• Churn in the grocery sector • Decline in the number of smaller stores and falling share of total grocery retail sales attributable to stores other than those owned by the main supermarket chains

particularly where documents are required to be part of the public domain. Commercial data providers also provide information to local planning authorities, media, and trade and interest groups. Importantly, there are a number of different data providers offering access to data-sets, which vary in terms of their method of data collection and presentation of findings. At the entry to the latest recession, retail commentators such as the Local Data Company were well placed to track changes in UK centres in the short term. However, it should be noted that access remained limited on account of the cost of data.

Implication of data constraints in understanding the state of the high street leading into the crisis

Owing to issues of availability, the ability of commercial and private information to shape government understanding of town centre change has been limited. It follows that the information available to other small town centre stakeholders e.g. town centre managers and small retailers, is limited. The two major consequences can be evidenced by a review of analysis of the impact of supermarket entry into the grocery sector immediately prior to the high street crisis. Firstly, the example demonstrates that owing to a lack of data there was a mismatch between the perception of town centre change and the empirical reality. The findings of the Competition Commission (CC) and the University of Southampton demonstrated that taken for granted assumptions regarding town centre change were not supported by available data, resulting in inconvenient truths[3]. Secondly, we can look back at the controversies of 2008 in respect of the inquiry into the groceries market, to gain insight into what can happen when conflicts arise as a result of mixed data sources.

Table 2 compares different commercial data sources that were referenced during a debate regarding the need to intervene to protect the small store sector following the entry of supermarkets into the convenience market. In 2008 the Competition Commission (CC) used GOAD data to explore the entry and exit of small shops across over 1,000 UK high streets, over the time period 1999-2006: "what the Commission's analysis essentially demonstrated was that entry of corporate supermarkets into one-thousand-plus town centres/high streets was often accompanied by 'positive' (exit-reducing/entry promoting), or at least 'non-detrimental,' impacts on particular types of small stores."[4] The research suggested, critically, that set within a context of continuing long-term decline of specialist small stores in the UK town centres, the entry of supermarkets was not inevitably and uniformly associated with negative impacts on the small-store sector. The results and methodology (using a commercial data source) ran counter to accepted understandings of town centre change and the way it should be measured. The research attracted criticism from the Association of Convenience Stores (ACS), who took their analysis from a different commercial data source – the Institute of Grocery Distribution (IGD). The ACS found that independent convenience stores suffered a sharp decline in the early 2000s as a result of the entry of Tesco and Sainsbury's into the convenience stores market. As demonstrated in Table 2, much of the difference in the differing conclusions can be explained by the manner in which data is collected by each provider and the geographical boundaries used by each.

At the start of the high street crisis, therefore, there was an imbalanced and contested understanding of high street performance. On the one hand some retailers had access to a large amount of increasingly complex data, and with increasingly sophisticated analysis which was supplemented by access to data from commercial providers. Potentially, the size and speed with which retailers obtain data hampers their ability to develop consistent answers with which they could navigate the crisis. On the other hand, the data available and consequent empirical research available on an open-access basis was severely limited. For local and national government, whilst some aggregate analysis was released in press releases from commercial data providers, there was a poor trajectory of information from which to understand the crisis. Where rigorous analysis had been possible of commercial data sources, the results did not fit comfortably with commonly held assumptions about high street change.

Companies such as the Local Data Company were well positioned to provide commentary on the impact of the recession. However, whilst a good deal of the statistics accorded with the work undertaken by the University of Southampton using GOAD data, "the empirical knowledge required most urgently, and which can add greatest value derive from inevitably more complex academic analysis."[4] This is where lack of data has been more crucial, providing a barrier to insights into the geographical and temporal changes in high street composition and the impact of Government intervention. Without this rigorous analysis, the headline figures from commercial data sources are likely to continue to provide a superficial and short term view of how high streets are changing. Non-retail uses are recognised to be an important component of high streets, and it is therefore important to highlight that data gaps exist in relation to non-retail uses within high streets also.

As a result of the problems with the evidence base, the resulting theoretical framework through which high streets are believed to change is constrained. In referring to the 'health' of high streets, or in some cases the risk of 'death' of the high streets affords high streets a persona of a living being, a body subject to changes which are perceived to lead ultimately to their demise unless forces of intervention relieve the pressure of external forces. An alternative perspective has been put forward which views high streets in the context of a framework of 'adaptive resilience'[5]. This perspective holds that the forces at play on high streets, instead of leading to their demise, in fact lead to their adaptation. Theorising high streets in this way results in a "strong argument that seeking for a return to previous configurations is of itself undesirable – that high streets have always been dynamic and adaptive, have rarely evolved in smooth and incremental ways, and have constantly been reshaped by periodic economic and competitive shocks.[4]" Theorising high streets in this way means empirical analysis regarding long terms trends is vital in situating and understanding short term trends. The lack of open data and particularly the gaps between data sources is particularly problematic in this regard.

Conclusion

Given the volume of statistics quoted on an almost daily basis in respect of retailing and town centres, it may seem strange to put forward the notion that there is a lack of data available to shape policy at both national and local government levels and commercial decisions for retailers and service providers. However, based on the evidence in respect of the current retail crisis, in particular the evidence submitted to the government's inquiries, in addition to the author's own experience as a practicing town planner, the situation prevails in spite of many calls for the issue to be addressed.[5]

To some extent the gaps have been partially remedied by commercial data sources. However, there is a need to acknowledge the data gaps that exist in understanding town centre change, and also critically to understand that the data gaps vary considerably on the basis of an ability to finance access to data sources. There is furthermore a lack of transparency and potentially a lack of consistency in the way that data is collected. Particularly, in relation to the need to monitor trends, there is a problem of continuity and access to archives of data, as well as irreconcilable methodologies. A number of consequences follow: firstly there is room for debate and uncertainty where multiple data sources exist, and secondly there exists the development of factoids or sound bites, (commonly used by the media) where data points are taken out of context in order to illustrate a point, creating a degree of accepted wisdom through repetition.

There are two trends at play which mean the need to develop a robust data source is more critical now than ever before. Firstly, the spatial intelligence of retailers has moved vastly ahead of that to which the public sector has access. This trend is likely to continue, and the gap likely to become more pronounced. Retailers have moved beyond the analysis of customer loyalty and credit card details to the complex analysis of unstructured data from sources such a social networking sites[6], and it has been estimated that the amount of data held by retailers will grow by 800% in a five year period[7]. Secondly, the sector as a whole has changed at such a rate that the window afforded to understand changes has decreased markedly. If it is not possible to understand the changes that have taken place in town centres through lack of data, our ability to effectively intervene to assist them is severely constrained. One of the key messages government should take from seeking to explore high street change in the recent crisis is that data gaps and inequalities exist in understanding high streets. The data collected by commercial data companies has a number of limitations, but on the whole the methodologies used are simplistic such that it can be effectively used as part of rigorous and detailed analysis to yield interesting and useful results, such as those produced by the Wrigley and Dolega in 2011. Trying to piece together this history is an important context for understanding high street change.

1. Sparks, L. and Findlay, A. In Brief: the National Retail Planning Forum Briefing Paper Series. International Journal of Retail and Distribution Management 2008 36(12) 1015-1023

2. Sparks, L. The Census of Distribution: 25 years in the dark. Area 1996 28.1, 89-95

3. Wrigley, N. Lambiri, D. and Cudworth, K. Linked trips and town centre viability. Town & Country Planning 2009 78 (10), 433-438.

4. Wrigley, N. and Dolega, L. Resilience, fragility, and adaptation: new evidence on the performance of UK high streets during global economic crisis and its policy implications. Environment and Planning A 2011 43: 2337-2363

5. In 1992 for example a report undertaken on behalf of the Department of the Environment (DoE) found that the lack of fundamental knowledge of the nature and extent of retail activity in the UK over the last decade "is the single most important contributory factor in absence of effective research into the effect of major retail development" BDP Planning & Oxford Institute of Retail Management (1992) The effects of major out of town retail development: a literature review for the Department of the Environment

6. Manyika, J. Chui, M, Brown, B. Bughin, J, Dobbs, R. Roxburgh, C. Hung Byers, A. Big Data: The next frontier for innovation, competition and productivity. 2011 McKinsey Global Institute

7. Graham Cooke reported in an article in Retail Week - Thomson, R. Making sense of unstructured data. Retail Week. October 2011.

Postscript

Three and a half years ago I was asked by Government to complete an independent review into the future of our high streets. The resulting Portas Review was just the start of my endeavours to revitalise our high streets, and since then I have continued to assert that our high streets will thrive, if we reimagine them.

I was therefore delighted to see this collection of perspectives on the evolving high street and, more importantly, the continued appetite for academic debate and support for re-envisioned, healthy high streets. We all know that reversing the many years of decline on our high streets won't be solved quickly, but it is only through research and informed discussion that we will speed the journey along and revive our local cities, towns, and villages.

I urge anyone with a vested interest in their high street and local community to find a few hours spare and settle down to reading these views.

Mary Portas

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Erin Brookes is a Research Associate at the University of Southampton. Erin has worked within the retail sector for over ten years in a number of commercial strategy roles at The Body Shop International and as Head of Business Development at Deloitte and Verdict Research. Erin has a MBA in Retailing from the University of Stirling, and is a current recipient of the University of Southampton's Post Graduate Research Scholarship, where she is pursuing a PhD in Management.

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Anne Findlay is a researcher at the Institute for Retail Studies at the University of Stirling. She has degrees from St Andrews and Durham Universities and began her career studying cities in North Africa whilst in Glasgow University. Since joining Stirling University in the 1980s, the focus of her research has been retail change including retail planning, store switching, retail regeneration, and town centres. She still enjoys tramping the streets for fieldwork, handling large data sets, and engaging with new social theories. She has published papers in a wide range of academic journals, is co-author of Retailing: Critical Concepts and The Retailing Reader, and has a column in Town and Country Planning.

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Cathy originally worked in the retail and fashion industries before joining the School of Business and Economics at Loughborough University. Cathy has been involved in town centre consumer research for ten years, successfully leading funded research projects. Her ongoing research into the 'town centre customer experience' is funded by the ESRC with support from project partners including Argos, the Association of Convenience Stores, Towns Alive, Boots UK, and the British Retail Consortium.

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Angus Laing is Dean of Business and Economics at Loughborough University. Prior to this, he was Professor of Management and Head of School of the University of Glasgow Business School and previously Beneficial Bank Chair of Marketing at the Open University Business School. Angus is currently Chair of the Association of Business Schools (ABS). Angus has published on issues of service consumption and management across public and private sectors in a range of academic and professional journals. He has lead successive ESRC funded studies of the impact of the information revolution on service consumption and a major Department of Health project on patient use of e-health services.

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Dionysia is Senior Research Fellow at the University of Southampton. She was the Engagement co-director of the ESRC Retail Industry Engagement Network (RIBEN) until 2013. Dionysia has been involved in several large-scale, policy-relevant projects focusing on high street viability. She has published extensively on issues of urban vitality, and in particular on the role of retail development in sustaining the economic health of town centres. Most recently (2014), she co-authored the ESRC/DCLG '*High Street Performance and Evolution*' Evidence Guide together with Neil Wrigley. Dionysia holds a PhD in Economics from the University of Reading.

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Serena Page is a Post-Graduate research student in Geography at the University of Southampton. Serena holds a Masters Degree in Town and Country Planning from University College of London and a Masters Degree in Geography from University of Cambridge. A Chartered Member of the Royal Town Planning Institute, Serena has been a practicing Town Planner for ten years. Serena presented at the High Street Futures Expert Scoping Workshop discussing the issue of town centre diversity and data availability. Serena's research interests relate to the data underpinning planning interventions to protect town centres.

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Marion Roberts is Professor of Urban Design at the University of Westminster. She has specialist expertise on the night-time economy and has led a number of funded research projects on the topic and published widely. Marion is a board member of Purple Flag and is currently chairing a task force on the night-time experience in central London. Her other research interest is in gender and she is co-leader of a working group on Urban Europe for the COST network genderSTE.

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Alex Singleton is a Reader in Geographic Information Science in the Department of Geography and Planning at the University of Liverpool. His research concerns how the social and spatial complexities of individual behaviour can be represented and understood within a framework of quantitative social science and computer modelling. In particular, this has extended a geographic tradition of area classification, and has developed a broad critique of the ways in which geodemographic methods can be refined through modern scientific approaches to data mining, geographic information science, and quantitative human geography.

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Leigh Sparks is Professor of Retail Studies at the University of Stirling. He has degrees from the University of Cambridge and the University of Wales and has been a Visiting Professor at Florida State University and the University of Tennessee.

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Dr. Jesse Weltevreden is professor of E-business at the Amsterdam University of Applied Sciences. He is also the chair of the Centre for Applied Research on Economics & Management (CAREM), the research centre of the Economics and Management faculty of the university. In addition to his function at the Amsterdam University of Applied Sciences, he has had his own research and consultancy company since January 2012: Weltevreden Research & Consultancy. Jesse Weltevreden has numerous national and international publications to his name concerning the effects of e-commerce on consumer behaviour, mobility, retailing and shopping locations.

Neil Wrigley

Professor Neil Wrigley FBA is the sole academic member of the Government Policy Advisory Group the Future High Streets Forum, and one of the world's leading economic geographers. Retail and consumption have provided a distinctive focus for his research for more than two decades.

Neil's PhD is from Cambridge, higher doctorate (DSc) from Bristol, and he has held prominent posts in both Geography and Planning - e.g Head of the Schools of Geography and City & Regional Planning at Southampton and Cardiff respectively. Between 1988 and1993 he edited the flagship journal of UK Geography (Transactions of the Institute of British Geographers) and from 2000-2014 was Founding Editor of the world-class cross-disciplinary Journal of Economic Geography (Oxford Univ Press)

His research, on behalf of and supported by Research Councils (notably ESRC), UK industry, central and local Government, international agencies (OECD etc) and National Academies has been awarded many prizes - the Ashby Prize (2004), the Royal Geographical Society's Murchison Award (2008). and the ESRC's Outstanding Impact on Business Award (2014). In 2003 he was elected Academician of the Academy of Social Sciences (AcSS), and in 2012 was one of the 38 distinguished scholars across the humanities and social sciences elected annually to the prestigious Fellowship of the British Academy (FBA).

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