

Corporate Convenience Store Development Effects in Small Towns: Convenience Culture during Economic and Digital Storms

Abstract

The impact of global economic crisis, together with the ‘digital’ storm of unrelenting growth in online retail and its complex substitution and modification effects, had significant implications for UK town centres and high streets. Dramatically increased vacancy rates within town centres have focused policy debate on the drivers of their vitality and viability in the context of profound technological and consumer culture shifts. As consumers turned away from ‘big basket’ one-stop weekly shops at large out-of-centre stores, and began shopping ‘little and often’ using a fragmented range of alternatives, the convenience store sector, significantly altered by corporate entry, grew rapidly. However, there is surprisingly little empirical evidence on the impacts of these new-generation corporate convenience stores on town centres and communities. This paper helps fill that gap by reporting the findings of a study of five small towns in southern England. Drawing on evidence from surveys of over 1,500 consumers and 200 traders, we show that despite their modest size, these stores have rapidly assumed significant and little documented trip generation and ‘anchor’ roles essential to the sustainability of the centres. Moreover, they have facilitated trends towards ‘relocalisation’ of food shopping, reduction in car dependency, and higher than expected levels of linked trips. In this paper, we draw out the significance of those findings and position them within wider conceptual and policy debates. We also stress the spatially and temporally contingent nature of the findings within a dynamic technological and regulatory context.

Keywords: – town centre, high street, retailing, online retail, retail planning policy, competition and markets

Forthcoming in *Environment and Planning A*

Accepted August 2018

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Acknowledgements: The empirical component of this paper reports research commissioned by Tesco plc from the University of Southampton. However, it also reports additional analysis completed after the conclusion of that research. The authors stress that in reporting the study’s findings, they have maintained full editorial control, and draw attention to both the transparency of the methodology and rigour of the survey process. As always, the views expressed in this paper are the responsibility of the authors. We gratefully acknowledge the research assistance on the project of Katherine Cudworth and Jen Li. Finally, we appreciate the supportive and constructive feedback of the editor and three reviewers. All errors and omissions remain the responsibility of the authors.

**** This is the authors’ accepted version. Please refer to the final published version within the journal ****

Introduction

For almost a decade now Britain's retail centres – whether large or small, urban or rural, 'north' or 'south', embedded in 'stronger' or 'weaker' regional local economies – have struggled to adjust to the simultaneous impact of both 'economic' and 'digital' storms. The global financial crisis of 2007-2008 and the subsequent collapse of consumer confidence sent a shockwave through UK town centres and high streets which exposed the impacts of long-term underlying forces of change that had remained somewhat masked during the preceding years of relative economic buoyancy (Wrigley *et al.*, 2015). Of particular importance amongst those structural forces on town centres was the progressive rise of e-retail which, according to Euromonitor, increased from £1.8 bill of sales (0.8% of total retail sales) at the start of the millennium to £116 bill (15.2% of total retail sales) in 2015 and is forecast to account for 21.5% of retail sales through 2018.

Of itself the rise in online retail was by 2015 exhibiting the disruptive and disintermediatory impacts on high streets and town centres that had been signalled but not fulfilled in the late 1990s. Moreover, after more than a decade of growth, its impact had both induced (see Weltevreden's [2007] discussion of substitution, complementarity and modification processes), and had also been reinforced by, some profound changes in the culture and practices of consumption which had become increasingly noticeable. Indeed, changes in consumption which were of such importance that they had begun to be regarded by industry leaders as 'a seismic reshaping [...] driven by behavioural change and technological disruption' (Shah, 2018)

Collectively, the changes in consumption practices have been referred to as the rise of '*convenience culture*' – a concept that involves a range of characteristics but which is rooted in the value consumers place on time and their perception of the costs versus benefits balance of particular types of shopping. To some degree an international phenomena (e.g. Zukin, 1998), the defining characteristics, in many different combinations, include increasing adoption of a '*top up*' lifestyle of shopping 'little and often' as well as the widespread use of online food retailing that fits into an increasingly time pressured work-life balance. This, in turn, reflects a growing disenchantment with the 'weekly shop' pattern typical of the preceding 40 years; a preference for skilfully '*choice edited*' 'simple to shop' stores, plus a seeking of convenience at the local community level, particularly if that can provide something specialist, authentic, and/or community-sustaining (Wrigley and Lambiri, 2014). In the latter sense it embodies a notion of convenience which is the antithesis of the type of "convenience" sought

between the 1960s and 1990s, particularly through processed and semi-processed *convenience* foods. However, as Meah and Jackson (2017: 2065) have recently argued in this journal, even those foods often regarded as ‘among the least healthy and most unsustainable of dietary options,’ subject to frequent moral disapprobation’, are through the consumption practices of everyday life often adeptly combined with fresh foods to such an extent and in so many ways that they ‘have been normalised as staples’ and can be incorporated into the convenience culture we describe above. Undoubtedly ‘convenience culture’ remains a rather fuzzy concept. Nevertheless, it captures important facets of the shifts in consumer behaviour and valuations which characterised the period since 2000 (see Sparks, 2017).

One increasingly visible dimension of those post-2000 shifts involved an accompanying, and unexpected, degree of growth in the convenience-store retail sector – defined by the Competition Commission (2008), now the Competition & Markets Authority, as being stores under 3,000 sq ft.. This previously slow growth and marginalised sector in which major corporate retailers had only a minor presence suddenly, beginning in 2002 and progressively thereafter, became a significant engine of innovation and expansion (Wood and McCarthy, 2013). Its transformation reflected on the one hand a *reactive* response by the major retailers to opportunities unexpectedly created by regulatory reinterpretation (notably the so-called ‘two market’ ruling of the Competition Commission in 2000 and 2003 – see Wrigley *et al.*, 2009:2064) and to the underlying consumption shifts just discussed. However, on the other hand, it also reflected a *proactive* attempt by those retailers to define and shape emerging landscapes of competition in an era of growing uncertainty. It was a transformation characterised by a step change in ranging, pricing, and store-environment quality across convenience store retail as the major food retailers brought their scale to the sector, and as incumbent convenience retailers sought to defend their position in the market via emulation (Wood *et al.*, 2010). In their turn, these improvements also progressively became mirrored in improved standards across many of the so-called ‘symbol groups’ - collectives of independent convenience stores such as Spar, Londis and Nisa. Indeed, the sector progressively became so dynamic that by 2016 it was being forecast to add more sales (+£11.7bn) over the following five years than any other sector of UK grocery retail and to increase its share of total grocery spend to over 21% (IGD, 2016). In summary, as Tesco stated to the Competition and Markets Authority in 2017 – ‘Consumer habits are changing. Growth has shifted away from big baskets and one-stop shops in large stores, and towards an increasingly fragmented range of alternatives’ (Tesco plc, 2017).

In previous work in urban & regional studies and economic geography several aspects of these developments have attracted attention – ranging from regulatory issues and the implications for consumer choice, through to attempts to articulate the concept of convenience culture (e.g. Clarke *et al.*, 2006; Hughes *et al.*, 2009; Wood and Alexander, 2016; Wrigley *et al.*, 2009). What remains surprisingly under-explored however are issues relating to the rise of convenience retail in the specific context of debates which surround the competition and sustainability nexus relating to small towns – issues which have long provided a heated focus of public policy debate (Powe, 2012). It is these issues which we focus on in this paper – specifically by outlining, assessing and opening to academic debate the findings of a study of the impacts of the development of corporate convenience retail in five small towns in Southern England, and by positioning those findings in the evolving policy context.

The context of retail development in small towns¹

While this particular research is focused around the impact of new generation corporate convenience stores on small towns, we are mindful that retail development is but one – albeit important – factor that contributes to the purpose and role of the town centre (*cf.* Dobson, 2017). Indeed, a range of leisure and wider services serving worker, tourist and residential communities make up a complementary ecosystem that provides diversity and vibrancy to small towns (see **Figure 1** for recent trends in services growth in UK town centres). That diversity, in turn, is set within broader policy and regulatory contexts relating to land-use planning, business rates, parking provision, enforcement and charging, and so on (Parker *et al.*, 2017) often serving to mediate via localised interpretations the reach and burden of those policies and regulations.

****Figure-1-about-here****

Keeping in mind this caveat about retail development being merely one element in any comprehensive interpretation of town centre trajectories over the past decade, we begin by noting that during the 1980s and 1990s there was a significant surge in out-of-centre retail development which was recognised as having several negative consequences, especially for the performance of middle order and smaller centres such as market towns and district centres

¹ Our research is focused at the spatial scale of the small town. As Powe and Bek (2017: 5) recently noted, the term ‘small town’ is ‘underpinned by a complex range of functional and perceptual meanings’ such that its size classifications range from 3,000 – 20,000 inhabitants and vary in terms of their local history, geography and the assets upon which they can draw. From our perspective, the classification is used as a spatial foci which is, on the one hand, buffeted by the wider economy (and related corporate and political actors), but equally possesses its own resources and agency to adapt and change.

(DETR, 1998; Thomas and Bromley, 2003). By the mid-1990s however, those effects had prompted and begun to be reflected in growing cross-party political support for a tightening of retail planning policy which would offer significantly greater protection for town centres. The shifting policy began in England with the landmark revision of *Planning Policy Guidance Note 6 (PPG6)* in 1996 and the introduction of the so-called ‘sequential test’ (Wood *et al.*, 2010). Retail development within established centres was prioritised, and implementation of the policy in England, and subsequently elsewhere in much of the UK, became progressively tighter. Revisions to planning policy over the next two decades maintained the focus, by which time the term ‘town centre first’ was in wide circulation and was more explicit in its inclusion of services as well as retail (Guy, 2006).

Within this policy context, campaigning groups (such as Friends of the Earth and New Economics Foundation) consistently argued that the ecology of small retail centres was different and fragile. In particular, they claimed that the vitality and sustainable development of such centres related to ‘the extra value that small, independent and genuinely local shops provide in terms of economic benefit, environmental distinctiveness and the social glue that holds communities together’ (NEF, 2006). That argument was sympathetically received and, in turn, became the basis for attempts to ‘lock out’ corporate foodstore development from small towns and high streets. In particular, the well-known Tesco poly campaign sought to provide guidance to local communities on resisting corporate foodstore market entry (Simms, 2007) and campaigns to dampen corporate retailer presence gained considerable political currency (e.g. APPSSG, 2015). At its most extreme, activism against supermarket expansion came to signify wider resistance against neo-liberalist ideologies (Dobson, 2017). We are cognisant, therefore, of the controversial nature of corporate foodstore development and the neo-liberal ideals upon which such expansion has been facilitated, and acknowledge how such trends have frequently generated discord. Nevertheless, as in previous contributions (Wrigley *et al.*, 2009), we seek to defuse some of the rhetoric and re-establish the connections between policy engagement and rigorous evidence-based research.

There are essentially two dimensions to the debates which were generated by the potential lockout of corporate foodstore development. The first concerns what might be the likely effects of *large foodstores* – in particular the types of developments which emerged in the post-PPG6 era of ‘town centre first’ policy and which were typically flexed designs facilitating the development of more difficult in- or edge- of-centre sites. The second concerns the same issues but considered with reference to the new generation of *small corporate convenience stores*

rolled out by the leading food retailers in the period from 2002 onwards. It is to these issues we now turn.

The effects of large foodstores on established centres

Two decades of post-PPG6 ‘town centre first’ oriented development policy in the UK has provided increasing evidence-based insight into four closely inter-linked issues at the centre of debates on the nature of such effects².

First, in contrast to predominantly negative views concerning the likely competitive impacts of such large foodstores generated by research conducted in the pre-PPG6 era (DETR, 1998), it increasingly became clear that consumers attached critical importance to the offer (price, range, quality, availability) of the foodstores in their nearest centre and that any lack of competitiveness in that offer risked removing a vital ‘*anchor*’ supporting those centres. Drawing on their study of Alnwick in North East England, Powe and Shaw (2004:407) for example concluded that via ‘careful siting within market towns, supermarkets at least have the potential to provide an important “anchor” for other services’ within the towns and, more generally, must be seen as a vital element in ‘*sustainable development*’ plans for small towns.

Second, and intertwined with the first – the capacity of larger-format in-centre/edge-of-centre developments to ‘*claw-back*’ significant proportions of trade that would otherwise, or had already, leaked not only to larger competing centres, but also to stand-alone out-of-centre stores (Powe and Shaw, 2004), began to be better understood. For example, Findlay and Sparks’ (2008) longitudinal study of in-town corporate foodstore development in the Scottish borders, illustrated how ‘*claw-back*’ in turn induced ‘*redistribution*’ effects which modified catchment zones across all other centres in complex ways. However, it was the willingness to engage with that complexity in public policy debate rather than tolerate attempts to suppress it which best marked the shift in academic position over the second decade post-PPG6.

Third, despite some scepticism in the literature regarding the scale of linked shopping trips likely to be generated by ‘town-centre-first’ era large-format foodstores (see Guy, 2006:182-85) and, in consequence, cynicism that the benefits of the trade clawed-back by such stores would be spread by that mechanism to other pre-existing retail and service providers in the centres in which the developments occurred, empirical evidence increasingly supported the

² Interestingly, many of the studies referred to below were undertaken prior to the rise of convenience culture and subsequent widespread investment in new convenience store formats by the corporate food retailers.

view. For example, in their studies of retail revitalisation and small towns in South Wales, Thomas and Bromley (2003) concluded that the revitalisation process was strongly dependent on the scale, quality and location of the food shopping facilities of such centres and associated ‘*spin off*’ shopping linkages, and that a large-format foodstore development, if appropriately integrated, could generate high levels of linked trips. In addition, more recently, an unusually large and detailed ‘before-after’ study involving 8,700 consumers in eight case study towns – four market towns in South-West England and four district centres in North-West England – following the opening of in- and edge-of-centre large foodstores (Wrigley *et al.*, 2010) suggested that such ‘town centre first’ era store developments might indeed be generating significantly higher linked trip levels than previously observed (Lambiri *et al.*, 2017) in both the market towns and district centres. Such conclusions contrast with a common view within the literature that had characterised ‘a main food shop’ as incompatible with linked trip generation due to considerations of perishability relating to chilled goods (Clarke *et al.*, 2006).

Fourth, despite a commonly held belief (related to media interpretation and embellishment of the New Economics Foundation’s [2010] ‘clone town’ thesis) that centres characterised by ‘*diversity*’, (defined as a higher than average representation of small independent stores) not only generated economic value and encouraged social cohesion, but were also more likely to be resilient to economic storms, UK Government commissioned research somewhat surprisingly found empirical support for the opposite view (BIS, 2014). That is to say, evidence that more homogenous centres tended to sustain their viability and perform better than less homogenous ones. Previous, but related research by Wrigley and Dolega (2011) had likewise found evidence of a positive relationship between diversity and resilience but had also detected indications that the town centres and high streets which had proved more resilient to the impacts of global economic crisis were more likely to have been characterised by some combination of *both* diversity and corporate-food-store entry – a position which later in the paper we suggest is a reasonable outcome to expect.

Other studies, meanwhile, stressed the importance of appreciating that the four issues just discussed are not solely retail-specific but apply more widely to a broad range of leisure and service activities, though the centrality of leisure and services to the generation of the footfall/face-to-face contact and associated urban ‘buzz’ essential to the health of towns remained under-developed (Powe and Bek, 2017).

The effects of new generation ‘corporate’ convenience stores on established centres

The second case concerns the implications for town centres of the development of new ‘corporate convenience’ stores. In this case, as we have already noted, there is surprisingly little publicly available evidence. One exception is a modest sized study published more than a decade ago (Wrigley *et al.*, 2007) soon after Tesco’s 2002 acquisition of T&S’ 862 convenience stores and its subsequent division of the T&S estate into two groups – stores which it believed had the customer-demand potential for conversion into the higher capital-intensity Tesco ‘Express’ format and those which it would retain in unconverted form under the ‘One Stop’ banner as a separate division (Wood *et al.*, 2010). The study explored the responses of 650 consumers in four communities in Hampshire, UK to the conversion of ‘traditional’ pre-acquisition One Stop convenience stores into ‘new generation corporate convenience’ Tesco Express format stores. It provided early indications of a *relocalisation of food shopping* (particularly in this case secondary/top-up food shopping) away from distant superstores and towards stores in the local community.

While the ‘Hampshire’ study, in retrospect, was ahead of the curve in identifying potential demand for new and localised forms of shopping, it was limited in scale and scope – being geographically concentrated within one affluent county within the UK and surveying a modest number of consumers. The research reported in this paper aims to fill the gaps left both by that study and in the wider evidence base to achieve the following objectives: First, to investigate how new-generation corporate convenience stores opened in-centre, affected the existing retail offer and viability of those town centres – providing new evidence on the trip generation, anchor potential and linked trip characteristics associated with the new stores. Second, to enrich, on the basis of evidence-based research, the often polarised policy debates relating to corporate entry into the convenience store sector. That is to say, the extent to which those small stores might have similar capacity to that observed in the case of larger format ‘in-’ or ‘edge-of-centre’ foodstores to ‘anchor’ the existing retail offer of the centres; supplementing and enhancing rather than detracting from the diversity associated with small and specialist independent shops.

The study is relevant for policy. In the land-use planning context, as Powe (2012:2226) notes ‘by focusing planning efforts on the prevention of inappropriate development outside town centres, there is a danger that insufficient scrutiny will be given to town-centre retail development proposals’ – consequently, this research helps us to untangle the effects of those smaller foodstores within established centres and to inform retail planning guidance.

The small centres/small stores study - methodology

The study focused on five small towns in southern England (**Figure 2**) chosen on the basis that all had experienced the opening of a new-generation corporate convenience store on an ‘in-centre’ site within a fixed window of time which in turn allowed the same team of fieldworkers to survey each town approximately 18 months after the opening of its new store. The southern England focus of the sample reflected constraints both of research funding and of fieldworker-team scheduling to meet the requirements of the survey design’. Additionally, it should be noted that the selection of small towns experiencing such store openings within the research window was limited and served to restrict the possible range of cases that could be examined. Nevertheless, the towns chosen exhibit some variation in vacancy rates, affluence, centre size and age profile as well as in the degree of competition they experience from neighbouring centres (see **Tables 1 and 2**). While we recognise, therefore, that issues of town centre atrophy are disproportionately focused in the north rather than the south of the UK (e.g. BIS, 2011; 2014) and that the response to the global economic crisis within the fabric of British town centres exhibited a clear north-south division (Wrigley and Dolega, 2011), our case study towns nevertheless were subject to and mirror the same forces of change. As such they provide a valuable, albeit partial, lens through which to explore the relationship between corporate convenience store opening and town centre vitality.

****Table-1-Table 2-Figure-2-about-here****

Sampling and survey instruments

Both consumers and town centre businesses were surveyed in the five case-study towns using face-to-face interviewer-administered questionnaires. Over 1,500 consumer and 200 trader responses were obtained, and interviewer-related response bias which might easily have posed problems was kept to a minimum by using the same experienced interviewers across all five cases. The questionnaires were then supplemented by detailed retail unit composition mapping, updating Experian/Goad survey data available for each centre.

The consumer surveys employed a stratified quota design, with the sample being segmented across age groups and by location within the catchment area to ensure adequate representation of the consumer groups. The 0-5 min drive time zone (immediate catchment) was assigned a higher weighting target. Across the five surveys, a total of 1,509 individual consumer questionnaires were completed with an average of 302 questionnaires collected per survey.

Despite some concerns with the slight under-representation of younger respondents, the achieved total sample sizes in each segment are large and sufficient to offer analytical leverage.

The consumer surveys were conducted at various locations within the primary shopping area of each town, including but not confined to locations close to the new stores³. As a result, the consumer surveys captured town centre users, irrespective of whether they shopped at the new stores or not. The questionnaire explored current food shopping habits in terms of location, frequency of use and mode of access. Additionally, consumers were asked to recall their food shopping habits prior to the opening of the new stores. Other items incorporated into the consumer questionnaire included reasons for visiting the town, linked shopping trip behaviour, perceptions of the attractiveness of the town centre as a shopping destination and perceptions of the impact of the new stores. In the case of businesses, interviewer-administered questionnaires were also used – however, when appropriate, businesses were given the options of ‘call back pick up’ or ‘mail back’ of questionnaires. In total 224 trader questionnaires were completed, covering both independent local traders and national/regional multiples.

Finally, retail composition information for each town was also collected to supplement available ‘pre-opening’ Experian/Goad survey information. Comparison of ‘pre-opening’ and ‘post opening’ information allowed assessment of change in the retail composition of the centres, and identification of retailers/services that exited and/or entered the local market.

The small centres/small stores study – main findings

Food shopping relocation

All consumer-survey respondents were asked to provide information on where they did their main and secondary food shopping, both in terms of location and type of retailer. **Table 3** summarises the aggregate findings on the use of the new Express/Local stores by respondents. Despite the small size of the stores (average 2,615 sq. ft. net) 8% of respondents used them to conduct their main food shopping, with a further 19% using them as their primary ‘top up’ food shopping source. In total, two-thirds of respondents used the new stores to satisfy some part of their food shopping, with more than a quarter of respondents using them for a significant part of their requirements.

****Table-3-about-here****

³ We acknowledge that there may be a ‘passing trade’ issue but this was not our focus. We direct the interested reader to a useful review by Gordon Stokes Transport (2015).

‘Relocalisation’ involves switching of main and/or secondary/top-up food shopping away from distant superstores and towards stores in the local community. Empirically we define it here as that pattern of behaviour among respondents who reside within the immediate (0-5 minute drive time) catchment area of a case study town.

In total 362 respondents from the immediate catchments were identified as main or first-named secondary-store users of the new Express/Local stores. Of these 362 (295 valid⁴) respondents 30.2% relocalised their food shopping – that is to say, switched their main or first named secondary food shopping from more distant stores in out-of-town locations to the new Express/Local stores. The range of the relocalisation effect across the five case study towns is large – from 18% to 59% (Sandown 17.7%; Olney 24.2%; Lyme 28.8%; Walton 32.9%; South Ockendon 58.8%). However, this is essentially a function of one case (South Ockendon), as the other cases are more tightly clustered in a roughly 20-30% band. We are not aware of any previous publicly-available data on the scale of the relocalisation effects induced by new-generation convenience stores. It is important, therefore, that future research is directed towards calibrating the typical scale and spread of these effects and whether there are any systematic variations by centre-type, centre-composition, geography, and so on.

Travel-mode substitution effects

Travel-mode substitution effects accompanying that relocalisation are also of considerable interest. In summary, these involved significantly increased walk/cycle-based and reduced car-based food shopping travel miles. As **Table 4** indicates, the percentage of consumers who walked to conduct their main or first-named secondary shopping increased by 14.8 percentage points – a rise of 25% relative to the pre-opening position. In contrast, car use amongst this group decreased by 43% relative to pre-opening result.

****Table-4-about-here****

Additionally it should be noted that these travel-saving benefits and associated reductions in car dependency were perceived by respondents to be one of the main drivers of their use of the new Express/Local stores. Of those respondents/users of the new store for main/1st named secondary food shopping, 56.6% reported they did so for its convenience/proximity to their

⁴ Valid respondents are those that have resided in the town for 18 months post-opening period and give a valid previous main first-named secondary foodstore

residence, while 13.1% said they preferred the new store because it was easily accessible by foot.

Trip generation effects and the ‘anchor’ role of the new stores in the local economy

Appreciation of what features of smaller centres have the potential to contribute most significantly to the centre’s medium/long-term economic sustainability requires by default understanding of what drives consumers to choose to visit particular centres when faced with a range of competing alternatives. We refer to those features as *trip generators*. Empirically, we attempted to capture them and measure their relative importance by asking survey respondents to identify their main reason for visiting the centre in which they were interviewed on the day we recruited them as part of our survey. As **Figure 3** shows, and with startling rapidity within eighteen months of their openings, the new convenience stores had become the most important *trip generators* in our case study centres – with 15.3% of respondents identifying them as their main reason for visiting a particular centre.

The data is suggestive, therefore of a significant – but previously un-documented – ‘anchor role’ of new-generation convenience stores, as attractors of customer footfall in the town centre. Although similar impacts have been identified in the case of some of the large foodstores developed on in-centre and edge-of-centre sites, we are not aware of this role being reported or its scale being assessed in the case of convenience stores

****Figure-3-about-here****

The role and levels of linked shopping trips

Definitions of the nature of linked shopping trips vary widely within the existing academic literature (NRPF, 2004) and their measurement requires careful assessment given concerns that previous linked trip findings which informed policy in the UK were ‘not measured on a consistent basis’ (Guy, 2007:182-3). For the purposes of this study, we employed two alternative methods of measurement. First, we collected data on consumers’ *actual* linked trip behaviour on the ‘day of survey’. Second, we obtained consumers’ perceived *propensities* to make linked trips (i.e. consumers reported whether they ‘always, usually, occasionally or never’ combined their visits to the new Express/Local stores with visits to other businesses in the town centre). Additionally, because information was obtained using face-to-face interview methods, it contrasted markedly with research that by default had used telephone techniques (e.g. Bennison *et al.*, 2000).

On the ‘*day of survey*’ a total of 458 respondents stated an intention to use the new Express/Local store at some point during their shopping trip that day. Of these, 170 (37.6%) stated their intention to visit just the Express/Local store and leave the town centre (*one-stop visit*), whereas 284 (62.4%) stated an intention to combine their visit to the new Express/Local with visits to other town centre businesses, distributing their combined visits in the ways shown in **Figure 4**.

****Figure-4-about-here****

The second measure employed to examine linked shopping trip behaviour was *perceived propensity*. Using this approach, over half (54.6%) of the new Express/Local store users stated an intention to ‘always/frequently’ combine their visits to the new stores with visits to existing retailers/service providers, with an additional 30% stating an intention to combine ‘occasionally’. Only 16.2% of new Express/Local store users intended to use the new store in the ‘one-stop’ manner feared by those inclined to ‘lock out’ corporate foodstore development from small towns and high streets – that is by intending ‘never’ to combine their visits to the new store with visits to existing businesses in the centre.

Despite being widely used in empirical research, it is clear that propensity measures are viewed by commentators sceptical of the positive externality effects of corporate retail entry into small centres as likely to overstate linked trips levels (see Guy, 2007:182-185 on the need to compare measures between similar geographies and store sizes). Some commentators believe that higher quality ‘day of survey’ measures of ‘actual’ trip linkage structures are likely to produce not only more reliable indications (because ‘day of survey’ data will inevitably contain a proportion of responses deriving from consumers who have effectively completed their trips when surveyed) (e.g. Hass-Klau *et al.*, 1998), but also more conservative indications of those externality effects (see, for example, the exchange between Howlett, 2015 and Wrigley and Lambiri, 2015 on this very issue). However, it is hard to find the empirical evidence which underpins this belief. Indeed, in the case of the research reported here, when we tested that assumption (**Table 5**), we found support for the opposite view. That is to say, propensity levels which were consistently more conservative than ‘day of survey’ (‘actual’) levels. It is not clear to us why such tests have not previously been undertaken but, at the very least, our results provide empirical evidence supportive of the view that the high levels of linked trip propensities we report are not an artefact of our measurement method.

** Table-5-about-here-**

Indications of the competitive impacts of the new stores from the consumer surveys

Users of the new stores were asked whether they believed that over the previous 18 months they had altered their use of pre-existing town centre retail and service providers. Over 63% of respondents were of the view that their usage had not changed following the opening of the new store. However, 27% of respondents believed they used particular pre-existing providers less frequently. Analysis of those responses by category and ownership type reveals that it was essentially (in almost nine out of ten cases) the pre-existing small corporate supermarkets (e.g. the Co-op, etc. stores) in the case study towns that were picked out as being the providers used *less* frequently following the opening of the Express/Local stores. In contrast, specialist independent bakers, butchers, fishmongers, greengrocers, delicatessens, health food shops and independent convenience stores were very rarely reported as being used less frequently.

Further evidence on the latter is revealed in **Table 6**. Here – taking into account the views of all 1500 survey respondents rather than simply those who had switched to the new Express/Local stores – reported use of pre-existing *independent* specialist-food and convenience stores is documented. The figures show little change pre- and post- the opening of the new stores, and are supportive of the view that the trade diversion which took place, although real, was essentially confined to corporate competitors of the new convenience stores. Indeed, perhaps even a slight increase in usage can be detected indicative of complementary trading and positive externality effects. And here we note that a similar finding was reported in the major before/after market towns and district centres study (Wrigley *et al.*, 2010) of large format foodstore developments on in-centre and edge –of-centre sites, referred to earlier. In particular, in the case of Ilminster, a market town in South West England, the majority of trade diversion was experienced by an existing in-centre Co-op supermarket and the number of respondents using existing independent town centre specialist-food and convenience stores for main food shopping 12 months post-opening of the new foodstore increased by 5.3 percentage points relative to the pre-opening situation.

Table-6-about-here

Consumers' perceptions of the effects of the new stores on their town centres

As **Table 7** indicates, when asked about the impacts of the new corporate convenience stores on the local town centre, a majority of respondents (55.2% - 680) perceived the new store to be a 'good' thing with the range of provision, enhanced footfall and associated buzz, beneficial competition, and enhancement of the town centre environment being the main drivers of that perception. The percentages answering 'bad' or 'no effect' were, by comparison, low but not trivial. 16.9% (244) perceived the new store to be bad for the existing centre, with the overwhelming concerns centred around perceived risks (negative competitive impacts) experienced by the existing town centre traders. As we will now see, however, those competitive concerns were less acutely felt by the traders themselves.

****Table-7-about-here****

Local traders' responses on the impact of the new stores

Across all five case study towns 205 local traders were surveyed – 86.6% independent traders, 12.1% multiple retailers. All were given the opportunity to express their summary opinion of how, eighteen months post-opening, the new convenience stores had affected their business. That is to say, whether the stores had been 'good', 'bad' or had 'no impact'. Using an open-ended question format, each trader was then asked to give reasons for their answer.

As **Figure 5** shows, a large majority of the local traders (70% on average and ranging from 64% to 77%) perceived the new convenience stores to have had little impact on their businesses – with a majority of that group believing that they were not in direct competition with the new stores. Much smaller groups of traders held strongly positive (15.7%) or negative (10.6%) perceptions of those impacts.

Of the traders who perceived the new stores to have brought benefits to their businesses, the majority attributed that to the additional footfall generated by the new stores and the extra vitality of the centre which flowed from that. These 'positive impact' perceiving traders were, as might be expected, differentially concentrated into the comparison-goods (non-food) retail and services categories – not least because the complementary goods and services they provided benefited from the positive externalities of linked trips centred on the new foodstores.

As noted above, the number of traders who felt negatively impacted by the new stores was less than might have been expected on the basis of the level of consumer concerns, though their concerns, like those of consumer respondents, focused on potential diversion of trade. The

reasons for this can be seen in traders' answers to a supplementary question they were asked in which they were requested to identify factors they perceived as impacting their current trading position – both positively and negatively. Interestingly, the competitive impacts of the new store openings were relatively low down the list of factors identified. Only 10.4% of traders cited the new foodstores, whereas 47.3% identified reduced consumer spending due to the general economic climate.

****Figure-5-about-here****

Discussion and Conclusions

Despite the intense controversy that has surrounded corporate food retailers' entry and subsequent rapid expansion in the convenience store sector, little publicly available empirical evidence has been available on the impacts of those developments. In this study, we have begun to fill that gap. We have shown how in many small towns '*new generation*' corporate convenience stores have very rapidly become the main trip generators, facilitating an important 'relocalisation' of food shopping, encouraging walk/cycle-based and reduced car-based shopping miles, and both reflecting and enhancing the wider shift towards what we have termed 'convenience culture'. Linked trip generation appears to be significant however we measure it, and competitive impacts on existing retail and service providers – although not insubstantial and acutely felt by some incumbent providers – are more widely tolerated by those providers in the small towns we investigated than might be expected. Not least, this reflects the sensitivity of most of the respondents in our trader surveys to what they regard as the more pressing threats of escalating business rates, uncertain consumer demand given a volatile economic climate, and the structurally disruptive rise of online retail.

But, in what ways are these findings more widely significant? In this context, we note the long standing significance ascribed to the linkage between centre viability/sustainability and linked trip generation in UK retail planning policy. Specifically the need:

[...] to seek to accommodate main town centre uses in locations where customers are able to undertake linked trips in order to provide for improved consumer choice and competition. [Helping to ensure that] the benefits of the new development will serve to reinforce the vitality and viability of the existing centre (DCLG, 2009: 28, par. 6.2).

It is clear from our findings, that new generation corporate convenience stores have facilitated the relocalisation of important aspects of consumer food retail expenditure, not least by

widening the range of products locally supplied as a result of these stores being tied into world-class supply chains and state-of-the-art store replenishment systems. In turn, that relocalisation has been amplified via emulation as the pre-existing corporate and independent traders have ‘raised their game’ to compete⁵. Taken together with their role as generators of linked trips, this implies more widely that the expansion of the networks of such stores over the past decade in the UK both has, and continues to, offer an opportunity to re-address and re-invigorate the sustainability dimensions of retail planning policy. So far, however, that is an opportunity which has largely been missed. Indeed, Findlay and Sparks (2017: 454) have suggested more generally that many of the profound changes which have taken place in the retail environment and in consumer culture over a decade of what we term structural disruption characterised by economic and digital storms and disintermediation of existing value chains ‘do not figure in planning consciousness; but [...] raise significant questions for planners’. They suggest, and we would agree, that there is ‘a disjuncture between timescales in the thinking of planners and retailers [...] [and that] the existing planning silos [...] do not deliver vibrant, meaningful town centres’.

Yet, given the intensity of the struggle that Britain’s town centres and high streets are engaged in as they attempt to adjust to the simultaneous impact of these forces of change, there is we would argue an additional and equally vital disjuncture – namely that between recent academic insight and conceptualisation of these issues on the one hand and what increasingly seem to be rather rigid, dualistic and uncoupled planning policies and practices on the other. One example of that would be the debates in urban and regional studies and economic geography over the salience and appropriate theorisations of concepts of resilience (Martin, 2012). To what extent can the insights which ‘resilience thinking’ (Martin and Sunley, 2015) has achieved in academic debate, together with concepts such as ‘adaptive resilience’, the adaptive cycle, and so on (Singleton *et al.*, 2016; Wrigley and Dolega, 2011) which have specifically been used in the context of retail centre adjustment, be utilised in retail planning policy and practice to develop new and creative approaches to managing the sustainability of centres across the diverse regional economic landscapes of the UK?

Nevertheless, it is important to stress that the competitive interactions detected within this study are spatially and temporally contingent. Our study was mainly focused on centres characterised

⁵ For example, in the case of the Co-op, a common competitor for the newly opened corporate convenience stores we studied, trade journal, *Retail Week* (2018), noted its revived ‘fortunes ... after investing in improving its own-label proposition and revamping its stores’. We contend it is highly likely that the increased competitive pressure from the corporate convenience stores has been a significant factor in these investments being made.

by mid-affluence and vacancy – it remains to be seen if the impacts we observed are mirrored in studies involving a range of centres serving severely deprived catchments where high street vacancy is more 'structural' and enduring (e.g. Findlay and Sparks, 2015). Furthermore, while our study focused on food shopping and the relocalising effects of corporate convenience stores, we acknowledge the possibility of related effects emanating from other distinctive retail or service developments – whether those are corporate, independent, or even the result of 'bottom-up' co-operative developments (*cf.* Dobson, 2017). More research is clearly required to explore the generalizability of these effects, and would be extremely useful in an international context where concerns regarding the resilience and sustainability of centres are widely shared issues.

The contingent nature of our study is also evident in its situation within rapidly shifting town centre ecosystems which continue to evolve in myriad ways partly in response to but partly facilitating the profound shifts in consumption preferences and consumer behaviour which have characterised the past decade. One illustration of that would be the compositional balance between corporate and independent retailers. In contrast to the 'clone town' vision of homogeneous 'corporate' high streets (NEF, 2010), recent evidence suggests that since the economic crisis there has been a marked shift away from multiples and towards independents in terms of their overall presence within UK town centres and high streets. For example, the Local Data Company reports that across the large sample of UK centres it monitors, independently owned stores increased by 2,722 between 2012 and 2016 while multiple retailers *decreased* by 6,846 stores – a trend which continued strongly into 2017 (LDC, 2017). However, this is not to suggest that the hold of corporate retailers on town centres and high streets has been consigned to history – we speculate that total corporate retail within centres might decline as suggested in the LDC data, whilst simultaneously the relative and strategic importance (in an anchor role sense) played by new corporate foodstore entrants (either large-format or convenience-format size) might increase.

The shifting inter-relationships between corporate and independent actors, between virtual and physical retailers, and between retail-dominated and wider service-, leisure-, experiential-dominated centres in the context of evolving consumer preferences provide the canvas upon which our study is painted. Clearly further research is necessary within small towns to assess these relationships as they develop and as the impacts documented mature and deepen. And it is clearly essential that such future research reflects and captures more of the persistent spatial inequalities which characterise the UK economy (Gardiner *et al.*, 2013) and that we begin to

understand how these issues travel in an international sense. While our findings currently highlight complementary roles played by new generation corporate convenience stores, these effects may alter over time and become more negative amidst dynamic competitive change (exactly the tensions which the Competition and Markets Authority had to keep in mind while assessing the likely competitive impacts of the now approved Tesco-Booker merger [CMA, 2017]). Economic geographers have an important role to play in monitoring and interrogating these tensions and developments – also assessing the extent to which these are concepts with international traction. Here we have sought both to provide ‘benchmarks’ for future investigations of these issues, and to indicate some of the wider conceptual centrality of these debates.

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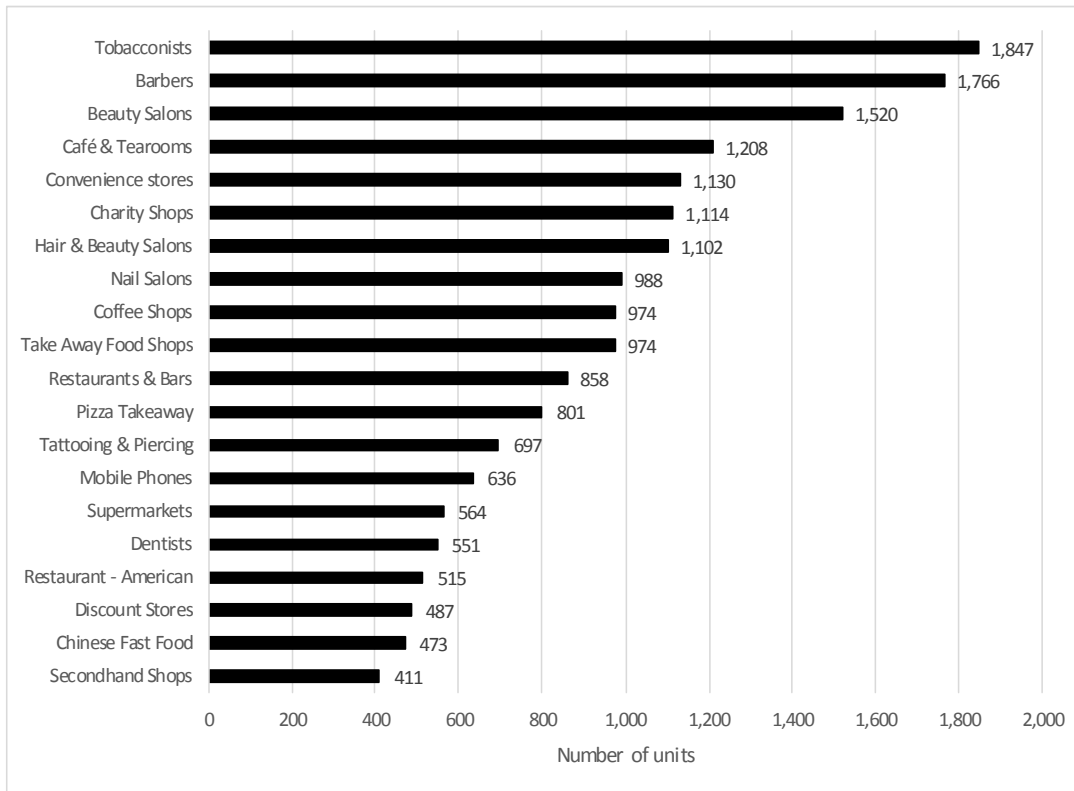
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Table 1: Characteristics of the case study town centres

Town	Total No. of retail units (pre-opening)	Vacancy Rate (%) (pre-opening)	Centre affluence (Annual household income versus England & Wales Average)	Centre description
South Ockendon	52	5.8	Mid--affluence (-14.3%)	Small compact centre/poor environmental quality
<i>Local centre in Essex just outside the M25, focused around the pedestrianised parade which suffers from increasing vacancy rates and lack of demand, particularly since opening of Lakeside regional shopping centre 3 miles away. Comparison retail within the centre (25% of composition) includes Boots Chemist but dominated by discount retailers, many stocking homeware and miscellaneous items. Has several retail/leisure services and community facilities but lacks financial services</i>				
Olney	81	1.2	High-affluence (+40%)	Attractive/compact
<i>Attractive market town in Buckinghamshire serving residents and surrounding villages. Nearest competing centres Northampton, Bedford and Milton Keynes 12 miles away. Compact centre with wide range of comparison retailers and service providers, most independently owned offering 'high-end' products and services. Prior to opening of Express store food retailing provided by Co-op supermarket, delicatessens, baker, health food shops, and CTN/newsagent. Town also hosts medium-sized weekly market and larger monthly farmers' market.</i>				
Walton on the Naze	109	9.2	Mid-affluence (-25.7%)	Medium-sized coastal Town
<i>Small coastal resort town in North Essex - nearest competing large centre Clacton-on-Sea (8.5 miles). Town centre has wide range of non-food comparison retailers (32% of composition) although many low quality gift and bric-a-brac shops catering to tourists rather than locals. Leisure services well represented but dominated by cafes/takeaways. Weekly markets held in centre car park. Seasonal nature of tourist trade results in low footfall, high vacancy rates and temporary shop closures during low season. Town also suffers from 'end of the line' location, which restricts passing trade. High share of retired residents, with over 60s over-represented by 21% cf. England & Wales average.</i>				
Lyme Regis	117	2.6	Mid-affluence (-22.9%)	Healthy retail mix/moderately compact
<i>Attractive resort town in Dorset noted for its Jurassic coastline. Competing centres include Axminster and Bridport. 6-10 miles away. Prior to opening of Tesco Express, food-related shopping focused on small Co-operative store, a greengrocer, three bakers, two CTNs, two delicatessen and an off licence. The town has a good mix of comparison retail catering for both town's residents and visitors. High share of retired residents, with over 60s over-represented by 18% cf. England & Wales average.</i>				
Sandown	115	5.2	Mid-affluence (-20.0%)	Tourist/leisure oriented moderately compact
<i>Resort town on the south east coast of Isle of Wight. Prior to opening of Sainsbury Local, town centre was served by one small supermarket (Co-op) and a range of independents including a bakers and butchers. Town's role as tourist destination is reflected in its retail composition which caters mainly for visitors, rather than local population.</i>				

Figure 1: UK net change in units by category type 2012-2016



Source: Local Data Company

Table 2: Case study towns: Catchment characteristics & new stores

Town	Store & size (sq ft)	Population		Demographics for inner catchment area		
		Inner catchment (0-5 mins drive time)	Outer catchment (5-15 mins drive time)	% unemployed	% retired (aged > 65)	% car-less households
South Ockendon	Tesco Express 2,370	14,572	334,265	4.5	12.0	30.7
Olney	Tesco Express 2,148	6,873	205,453	1.8	12.0	12.7
Walton on the Naze	Tesco Express 3,002	10,487	83,972	3.0	32.4	30.5
Lyme Regis	Tesco Express 2,852	4,406	39,694	2.0	27.7	20.7
Sandown	Sainsbury's Local 2,702	12,679	55,696	4.3	20.3	29.7

Figure 2: Location of the five case study towns

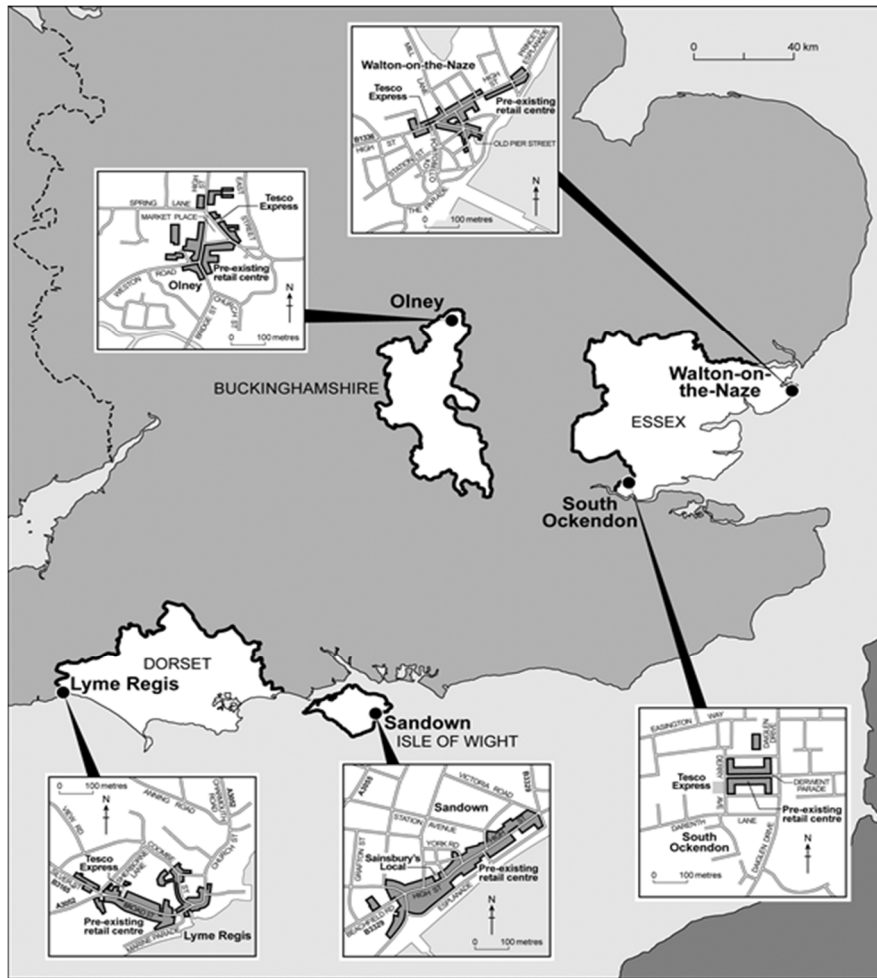


Table 3: Use of new Express/Local stores by all respondents

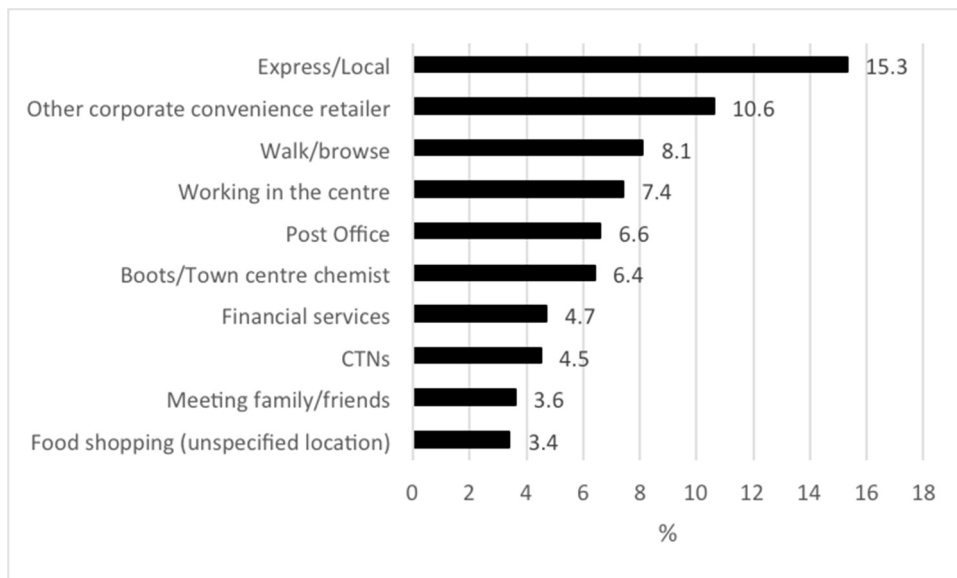
Type of store use	N	%
Primary food store	123	8.2
1 st named secondary store	293	19.4
2 nd named secondary store	398	26.4
3 rd named secondary store	185	12.3
Non user	510	33.8
Total	1,509	100.0

Table 4: Primary travel mode used for main/ first-named secondary shopping by ALL valid¹ respondents who switched their food shopping to the new Express/Local stores

Mode of travel	Mode of travel to previous foodstore for main/1 st named secondary shopping (before switching)		Mode of travel to Express/Local for main/1 st named secondary shopping	
	N	Valid %	N	Valid %
Private motor vehicle	91	31.5	52	18.0
Walk	173	59.9	216	74.7
Bus	15	5.2	10	3.5
Taxi	1	0.3	1	0.3
Bicycle	3	1.0	6	2.1
Other	6	2.1	4	1.4
Valid Total	289	100.0	289	100.0

¹ Have been residing in the town centre prior to store opening and have a valid previous first named secondary foodstore

Figure 3: Top 10 ‘trip generators’ listed by respondents on the day of survey¹



¹One reason given per respondent, percentage based on valid responses (n =1,490)

Figure 4: Linked trip intentions of Express/Local users on the day of survey

284 respondents stated an intention to combine their visit to the new Express/Local convenience store with visits to existing retail/service providers

56 respondents (19.7%)
Stated an intention to combine Express/Local & existing corporate food retailers

160 respondents (56.3%)
Stated an intention to combine Express/Local with other town centre retailers/service providers

42 respondents (14.8%)
Stated an intention to combine Express/Local with both existing corporate food retailers & other town centre retail/service providers

26 respondents (9.2%)
Stated an intention to combine Express/Local & non-retail destinations in the town centre

Table 5: Comparing two measures of linked shopping trips – case by case

Town	‘On the day of survey’ data			Propensity data		
	Users of the store ‘on the day of survey’	Linked trips ‘on the day of survey’		Users of the store (Total)	Propensity of linking trips (always & frequently)	
		N	%		N	%
South Ockendon	67	41	61.2%	177	112	63.3%
Olney	108	71	65.7%	203	114	56.2%
Walton on the Naze	131	73	55.7%	218	97	44.5%
Lyme Regis	66	43	65.2%	188	107	56.9%
Sandown	86	60	69.8%	192	104	54.2%
All cases	458	288	62.9%	978	534	54.6%

Table 6: Respondents’ reported usage of pre-existing independent specialist food-related stores (bakers, butchers etc) and independent convenience stores – pre- and post- new Express/Local store openings

	Pre opening		Post opening	
	N	%	N	%
As main food store	28	1.9	27	1.8
As 1 st named secondary food store	141	9.3	143	9.5
As 2 nd /3 rd named secondary food store	124	8.2	160	10.6
Total number of respondents surveyed	1,509	100.0	1,509	100.0

Table 7: Top five reasons listed by consumers for stating that the new store is either GOOD or BAD for the town centre

Top 5 reasons for answering GOOD	N	%	Top 5 reasons for answering BAD	N	%
The new store has improved the range of foodstores in the town centre	220	32.4	The new store affects the trade of existing retailers	158	67.8
The new store has attracted more people to the centre	154	22.6	Do not like Tesco as a company	16	6.6
The new store provides welcome competition for the existing corporate foodstores	102	15.0	Did not need the new store	15	6.1
The new store has improved the town centre environment	37	5.4	The new store has caused a loss of shops/businesses in the town centre	15	6.1
Good to have the Tesco/Sainsbury's brand in the town centre	24	3.5	The new store has spoilt the town centre environment	11	4.5
Base: Number of valid respondents that gave a reason for answering 'good'	680		Base: Number of valid respondents that gave a reason for answering 'bad'	244	

Figure 5: Case by case comparison of traders' perception on effects of new stores on their business

