

## CASE STUDIES

# Aspirations of Retailers and Visitors Towards the Regeneration of Declining Streets in Cities

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City Centre retail spaces are integral to the sustainability of cities, and within this hierarchy secondary shopping streets, which act as hubs for local communities and businesses, have become isolated. There is now a recognised need for academic studies to reverse these trends in these areas, especially in a UK context. This work analysed and compared stakeholders' perceptions of urban interventions in a declining secondary retail area in Southampton. The investigation was based on interviews and surveys of stakeholders, as well as observational studies enhanced through analysis of secondary data.

This paper presents the outcomes of such investigations addressing the perceptions and behaviours of retailers and visitors, focusing on where these are aligned or divided. The overall results reveal that retailers are more concerned with 'static' improvements, such as parking provisions or building façade improvements, while visitors are concerned with active and spatial improvements, with street level interventions being the most important. The results also show that (a) whilst retailers may believe that they understand what visitors require; they differ greatly and (b) many aspirations of retailers are costly or dependant on other businesses' intentions. Visitor's desires: include the reuse of vacant stores and creation of public space, which are far more viable, and can be enacted by governance. Such options should be trialled as a means to educate and improve understanding of less traditional interventions. The paper also provides input on ways to make these failing areas more sustainable through a shared vision and wide applicability.

**Keywords:** Retail; Regeneration; Sustainability; Cities; Public space

## 1. Introduction

Cities have been described as transaction machines enabling human interaction (Stonor, 2011) with city centre retail spaces an integral part of the socio-economic fabric, acting as a centre of creativity allowing local communities to pass, relate and transact (Granger, 2010; Griffiths, 2015). Research has proven that city centre viability is essential to the sustainability of cities (Ozuduru et al., 2014), and retail's economic and cultural role within a city requires study at multiple scales, from various theoretical viewpoints (Wrigley and Lowe, 2002).

The aim of this study is to examine how businesses and visitors perceive secondary retail areas and actual and potential interventions, beginning to understand how stakeholders compare and contrast and what impacts their perceptions have upon their behaviour. The paper adds to the ongoing literature on the regeneration of

the UK retail environment by providing insights into the complexity and diversity of secondary retail and how this affects implementing sustainable regeneration.

Secondary retail locations have been defined as either; town centre fringe retail streets on the periphery of major town centres, urban district centres within large towns/cities or local centres which are the retail streets of small towns and villages (Hillier Parker, 2000; Tym, 2000). It is necessary to distinguish between these types of secondary shopping areas as they each have distinct issues that merit independent investigation (Tym, 2000). This research is specifically looking at peripheral streets in town centres where the hierarchical terms 'primary retail areas' and 'secondary retail areas' are used to distinguish between types of retailers present, pedestrian flows, size of retail units and rental values (Baldock et al., 2004). Primary retail areas are characterised by having a high representation of national retailers, larger units and high pedestrian flow and rental values. Secondary retail areas differ in that they are defined as having relatively small retail units and are predominantly occupied by independent retailers with low pedestrian flow and rental values. This definition concurs with definitions used in planning documentation which further state that secondary retail areas are within walking distance of primary retail areas

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(200–300 metres) and provide greater opportunities for a diversity of uses (GVA, 2015; Harris, 2015). It has been noted that the terminology 'secondary retail areas' can often make one think that they are inferior but its usage is solely to recognise the different role such an area provides, as they contribute a multitude of benefits to the community and liveability of the city (Baldock et al., 2004; Clarke and Banga, 2010).

Secondary retail areas, with a wide diversity of outlets, play a significant role in the local community providing a vibrant public and street culture compared to the more regulated primary areas (Millington and Ntounis, 2017). They often act as a hub, meeting the needs of local, disadvantaged and socially excluded communities, and those with limited finances or mobility, reflecting place-based diversity (Clarke and Banga, 2010; Findlay and Sparks, 2012; Quinn et al., 2013). Small enterprises aid the growth of entrepreneurs who contribute to improving the quality of life for those supporting their profits (Bhale and Bhale, 2013). They are a notable contributor to local and regional economies when compared to primary retail areas (Calderwood and Davies, 2012; Quinn et al., 2013), a significant source of local entrepreneurial innovation (Jones and Evans, 2008; Quinn et al., 2013) and are a breeding place for innovation and the development of niche, specialist retailing allowing for a wider diversity tailored to local needs (Hallsworth and Orchard, 2009). Furthermore, employment opportunities are greater in secondary retail areas, where on a sale-for-sale basis small to medium enterprises (SMEs) employ more staff (Wheeler, 2007).

The UK retail market has had a long-established characteristic of being subject to sequential periods of change (Parker et al., 2017; Schiller, 2001). Over the previous decade retail has been, and still is, undergoing a period of transformation, with key changes including the growth of out-of-city and inner-city developments and the rise of 'convenience culture' (Hart et al., 2013; Peel and Parker, 2017; Thomas et al., 2004). Following the 2008 economic crisis and the emergence of e-commerce, consumers are fundamentally different to how they were pre-recession (Slaughter and Grigore, 2015). Town centre consumers have re-evaluated the economic and social costs associated with retail (Wrigley and Lambiri, 2015) with an increased interest in experiences and co-consumption (Lindblom and Lindblom, 2017). As a result of these changes, the numbers employed in retail and shops in the city centre have been in decline, with predictions of 900,000 fewer retail jobs by 2025, approximately a third of the 3,022,000 employed in retail in 2014 (British Retail Consortium, 2016). Added to this a focus on town centres and 'new' spaces has led to a changing 'centre of gravity' isolating peripheral secondary streets (Baldock et al., 2004) leading some areas to become disconnected and derelict (Millington and Ntounis, 2017). Studies have shown that secondary areas do not follow the same trends as primary areas, with a different capacity to accommodate change (Findlay and Sparks, 2012). SMEs have less responsive measures available to combat the changing market compared to larger firms which can invest (in technology or training) and reduce costs by improving efficiencies, so

this evolution is likely to be of particular importance to secondary retail (British Retail Consortium, 2016).

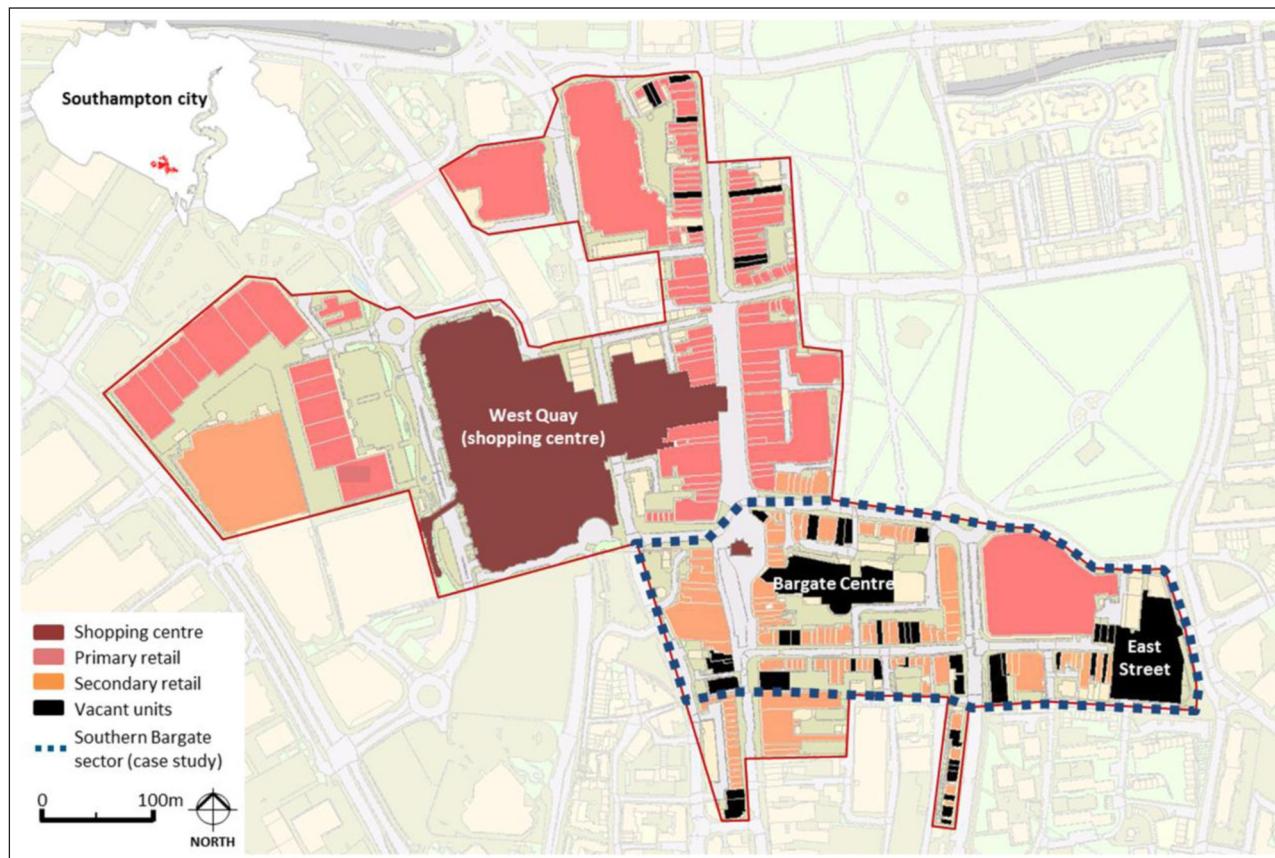
There are a number of key performance indicators (KPIs) used to measure city centre retail performance, such as the National Planning Policy Guidance (DCLG, 2014), Understanding High Street Performance Report (GENECON, 2011), and Colliers International (2013). Whilst these vary, they often focus on four key KPIs; footfall, consumer and business satisfaction, diversity of business establishments and economic activity (Lawlor, 2013). These current methods for determining the KPIs consider the retail core as a whole rather than its constituent parts and whilst they produce generalized statistics, there is little recorded regarding the perceptions of stakeholders. Added to this, research has looked to classify retail centres, where Coca-Stefanki (2013) created a Town Centre Classification Matrix which determined city 'personality' types. This was dependent upon the visitors they aim to attract (local, regional, national or international) and their equity focus (be that economic profit or social capital), meaning a centre could range from community-focused to specialist. An alternative approach by Quin (2016) classified towns upon their change in footfall during the year classifying centres as either holiday, convenience/community, speciality or comparison. These methods have strong merits and are useful tools for governance however different sectors within a centre are distinct and can be categorised in the same fashion. Studying a particular area of retail will increase the understanding of how the various stakeholders perceive and react to interventions determining where there is a shared vision and understanding.

While there has been much research into city centres (Kärrholm et al., 2012; Lawlor, 2013; Thompson et al., 2015), there is a recognised need for academic studies which report on retail change in secondary areas (Hallsworth and Orchard, 2009). Specifically, local context data is required to understand how spatial and economic factors affect SME retailers within city centres (Findlay and Sparks, 2012). This work seeks to contribute to the development of knowledge on prioritising success in secondary and tertiary retail districts, providing understanding of their place in the city, particularly with regard to inner city developments and changes in retail. The work explores approaches, which may become valuable for the regeneration of city centres across the UK through addressing underused sectors.

The paper proceeds by first describing the case study for the work highlighting the problems facing secondary retail, followed by the methodology and findings of the visitor and business surveys. It concludes by describing the differences in stakeholder perceptions providing inputs on ways to improve the sustainability of secondary retail areas through a shared approach.

## 2. Case Study

The case study (**Figure 1**) is situated in the centre of the City of Southampton as whilst relatively small in comparison to other major cities, shares many elemental characteristics with other cities and was one of the first UK cities



**Figure 1:** Location of case study in Southampton city centre with vacancies (April 2015).

to experience a city centre retail-led regeneration scheme (Hallsworth and Orchard, 2009). The city established the transformation from 1980s out-of-town developments to inner city renewal with the opening of a major city centre shopping centre, West Quay, in September 2000. It was the largest of its type at the time ( $74,500\text{ m}^2$ ), recentering the retail core which was previously linear in nature reflecting an American "dumb-bell" form spanning north to south across a traditional high street (Husain, 1981). A study by Lowe determined that on balance the introduction of a new shopping centre had been a positive force for change, enabling further urban redevelopment/regeneration projects (2007). Alternate research however identified that SME retailers were disadvantaged, concluding that the city should become more proactive in locating areas which require additional and alternative regeneration (Hallsworth and Orchard, 2009).

The area investigated for this study is the Southern Bargate sector, a collection of secondary retail streets situated to the south east of the city centre. The allocation of primary and secondary retail areas as shown in **Figure 1** is in accordance with the distribution outlined in the Southampton City Centre Action Plan (2015). The area is currently architecturally and aesthetically unappealing, with the urban form defined by a number of small development blocks, and some larger single-footprint buildings. This historically significant area (previously the centre of the city) is supposed to provide a connection between the retail core and the southern waterfront however the closure of two shopping centres (Bargate

Centre & East Street) has led to the area being further disconnected and isolated. The city has a clear divide in primary and secondary retail sectors in the centre with levels of pedestrian flow and occupancy being far lower in the case study sector (Feria Urbanism, 2015; Harris, 2015). The factors outlined; recentred retail core, poor connections, tired aesthetics, and reduced levels of footfall and occupancy are represented in similar areas across the UK (GVA, 2015; Shepherd, 2013).

### 3. Methodology

The study utilised quantitative and qualitative methods; involving primary research in the form of surveys with city centre consumers (referred to as visitors) and interviews with retailers, observational studies and analysis of secondary data, such as GIS data sets, methods in line with similar studies (Cachinho, 2014; Findlay and Sparks, 2012; Ozuduru et al., 2014).

Face-to-face surveys and interviews were conducted to discern traders and visitors behaviour, views on the sector's current state and the perception and influence of urban interventions and change in the city. Multiple survey methods were trialled for businesses including drop-off, internet and phone surveys, with the first two being most convenient for both parties. Under trial however both forms had minimal responses, even following numerous trips to the retailers to remind them to complete it. Phone surveys also yielded low response rates with many retailers not picking up the phone and those that did were not prepared to answer questions over the phone, instead

asking the researcher to personally visit the store to conduct an interview. For these reasons the surveys were personally conducted in individual shops, with retailers being interviewed in-between serving customers. The visitor surveys were conducted following the business interviews and were condensed to enhance the likelihood of uptake and to retain participants' interest and not adversely affect responses. They were undertaken individually face-to face with the researcher on the street to ensure full comprehension and to minimise social bias responses. The interviews and surveys were composed of a mix of direct, factual questions and subjective ranking/selection questions designed to prompt opinions from the participants. Many questions measured responses on an interval level, using the Likert scaling method on a 1–5 disagree-agree response scale, allowing participants to remain neutral whilst providing sufficient detail on the degree to which they agreed or disagreed with individual responses. Numerous retail studies have based their findings on surveys, using bottom-up data collection (Kärrholm et al., 2012; Ozuduru et al., 2014; Thompson et al., 2015) valuing the specific knowledge of local respondents, many of whom have been present for many years.

A census of retail was undertaken to record data on store location, typology and occupancy as well as the size of the business. This involved a research personnel walking the streets of the city centre area across multiple days to ensure all businesses, including those that are part-time, were recorded. Alongside this urban morphology analysis was conducted using GIS data sets to analyse the urban form, understanding building footprints, door encounter rates and pedestrian priority surface coverage. Pedestrian flow (quantity of people moving one way through an area/virtual gate in a set time) was recorded through manual observations across multiple zones in the city. The footfall study was undertaken over a four week period in September with recordings taken across ten time periods from 8 am to 6 pm on weekdays and weekends. Footfall in retail areas is under a constant state of flux, highly dependable upon factors such as weather, day of the week and time of the year (Turner et al., 2011) and the recordings were to provide a guide on visitors preferred shopping hours.

In-depth interviews with retailers were undertaken in April 2015, sampling 33 out of 68 businesses in the Southern Bargate sector. The retail census was also undertaken in April 2015 alongside the urban morphology

analysis. The visitor survey was undertaken over a number of days in September 2015, sampling 120 visitors across the full breadth of the external city centre streets. The range of respondents were similar in age and employment demographic to Southampton census data (ONS, 2011). The sample sizes may appear limited; however they are sufficient in comparison to similar studies which have interviewed relatively few participants, such as 11–20 businesses and 20–44 consumers, stating difficulties in establishing contact with respondents. (Andres Coca-stefaniak et al., 2010; Kärrholm et al., 2012; Thompson et al., 2015; Wagner et al., 2005). A study in Turkey assumed the number of visitors that should be surveyed for a study to be significant was in proportion to the span of the street. They concluded that one should survey approximately 87 visitors per km of street (Ozuduru et al., 2014). The external retail streets in the city centre measure 1.4 km in length which would require 120 participants. As the key for this work is to understand differences in stakeholders' perceptions of actual and proposed interventions a snapshot survey was deemed suitable, with the findings providing a solid indication of the general consensus. Before any survey studies commenced, they obtained ethics approval from the University's Ethic committee and were authorized by the City Council.

#### 4. Results

Results from the retail census (**Table 1**) show secondary streets to have a far greater percentage of vacant retail units (30%) compared to primary areas (8%). There is a noticeable difference in the percentage of pedestrian priority surface areas, primary areas were found to have a large percentage of area prioritized to walking (85%) whereas secondary areas had more space for vehicular access. One street in the sector only had 46% of surfaces designated for pedestrian usage. Sizes of retail units in the case study were smaller than other sectors with only 26% of units larger than 200 m<sup>2</sup>, compared to the shopping centre and primary areas (which were each 44%). Further differences were noted in the ratio of independents to chain stores, the shopping centre unsurprisingly is dominated with national chains while secondary areas have far more independent stores (47%). This all being said the door encounter rate (average distance for a pedestrian to pass-by a doorway) is similar across sectors so there is similar density of activity. Store typologies across the retail hierarchy differed, particularly in the percentage

**Table 1:** Census of retail units in Southampton city centre (April 2015).

	Shopping Centre	Primary Retail	Secondary retail	Tertiary retail
% of vacant retail units	2%	8%	30%	25%
% of independent stores (1–2 stores)	1%	23%	47%	56%
% of large sized shops ( $\geq 200 \text{ m}^2$ )	44%	44%	26%	23%
% of pedestrian priority surface	100%	85%	67%	45%
Door encounter rate (m)	7.2	7.4	7.6	12.7

of clothing and footwear outlets, which comprises the majority of businesses within Southampton's shopping centre (32%) and only 9% of secondary locations.

The reasons for vacancies were vast with the restriction in unit size being a common cause of concern for secondary areas not meeting modern retailer's needs (Duffy, 2015; Shepherd, 2013). Distance from the retail core appeared to correlate somewhat with levels of vacancies, indicating that visitor's retail route is possibly curtailed at edges of the city centre or impacted by the inferior pedestrian environment. Distance from the centre also related to the amount of pedestrian priority surfaces with southern and northern sections disconnected by wide roads in contrast to the pedestrianised centre. The difference in store typology is a nationwide concern with shopping centres focusing on clothing and footwear, as revealed by further retail censuses undertaken at Basingstoke's Festival Place and Birmingham's Bullring<sup>1</sup> (35% and 42% respectively). Restaurants and cafes are the second largest usage of units within shopping centres, which further reflects how the retail experience is more than the traditional concept of simply going somewhere to get something and the increasing trend of collaborative consumption (Lindblom and Lindblom, 2017).

Only 16 stores surveyed experienced the opening of West Quay, 50% of these experienced a large decrease in revenue, whilst 44% recorded a large decline in footfall. When asked how quickly changes in footfall and revenue occurred 45% indicated that it took one month while 40% indicated the effect was very gradual (months).

#### 4.1. Visiting frequency

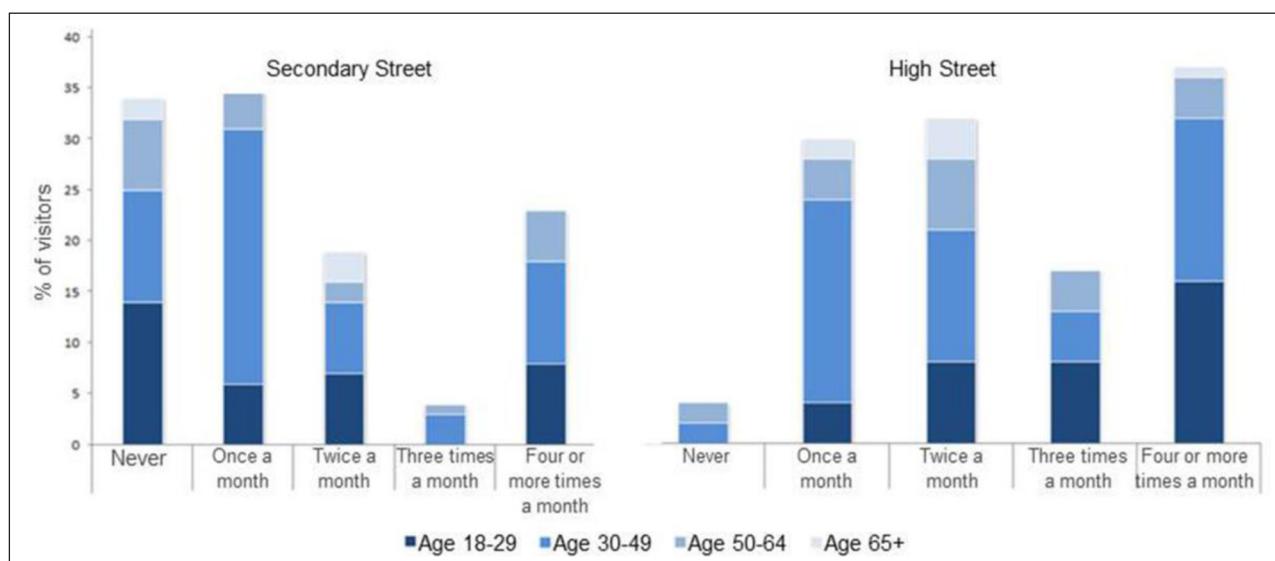
The primary high street (Above Bar) in the city centre was, as expected, the most widely visited sector within the City Centre with the majority of visitors surveyed (72%) frequenting the area two or more times a month whilst 31% visited 4 or more times. Very few of those asked (3%) never visited the precinct, a considerably low figure compared to the 30% of visitors who never visited secondary

streets. This said 80% of those surveyed who resided in the local postcode (SO14), visited secondary streets two or more times a month. **Figure 2** presents the cross-analysis of visiting frequencies to a secondary street and the high street with age group. It shows that there is a large proportion of 18–29 year olds who never visit a secondary retail area but none that never visit the high street, with very few (11%) only visiting once a month. The 18–29 bracket are most likely to visit the precinct four times a month (44%), while those aged 30–49 (depicted as the key target consumer by the Southern Bargate traders) have similar visiting frequencies for the two sectors, likely visiting the entirety of the city centre on their retail excursions.

Visitors were also asked to select the reason for their visit to the city centre and the findings revealed that retail sectors are not only places of transaction, but of pleasure and social engagement. Entertainment was the chief reason for visiting followed by shopping and then eating & drinking along with meeting friends. Shopping was only the reason for visiting for 40% of respondents whilst 11% were there for strolling/window browsing. The majority of visitors (85%) were found to favour stores opening later than 5 pm on a weekday, which seems logical when one considers that pedestrian flow in secondary areas was 30–70% higher from 5–6 pm (a time when the majority of stores in the sector are closed) than that from 10–11 am. When surveyed, 64% of businesses were willing to open later, this was however dependant on others following suit. Retailers opposed to altering traditional operating hours stated in interviews that they were not willing to compromise their current lifestyle.

#### 4.2. Influence of urban factors

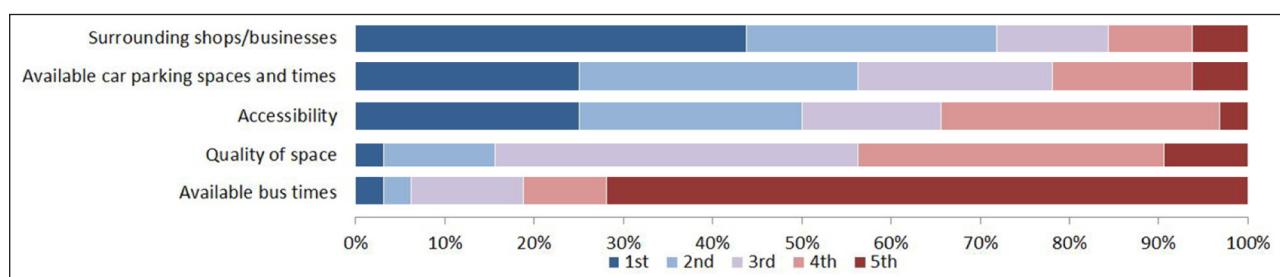
Participants were asked to rank five urban factor in terms of importance for the area, **Figure 3** shows that retailers ranked surrounding shops/businesses and available car parking as the most important factors to consider in a retail environment. Visitors (**Figure 4**) on the other hand



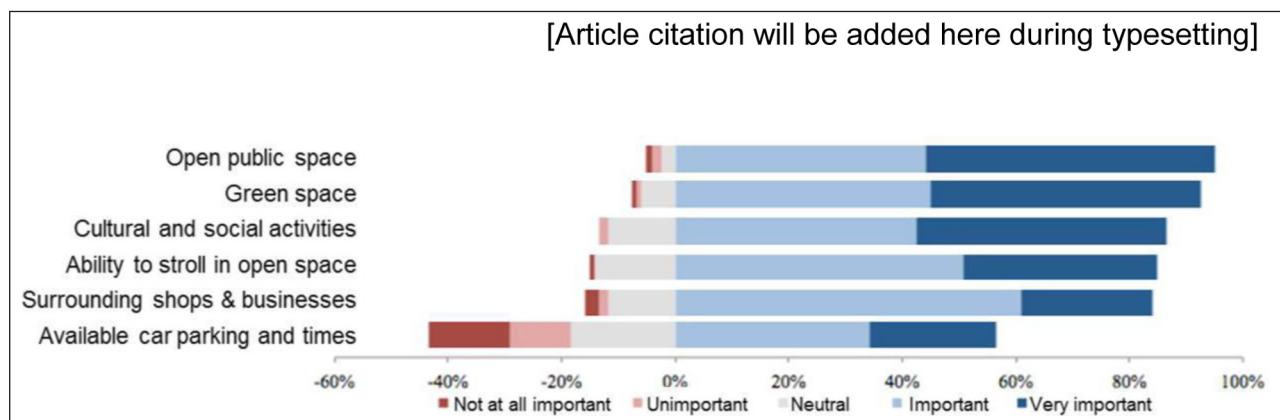
**Figure 2:** Distribution of the age of visitors visiting a secondary street and the high street.

did not perceive these factors to be overly important, with almost half of those surveyed (43%) not perceiving available car parking and times as important when deciding whether or not to visit a retail sector. Surrounding shops and businesses were considered to be of more importance, but notably only 23% thought them to be very important. Conversely, other factors such as open public space, green space and cultural and social activities had a far greater percentage of visitors perceiving them as very important (51%, 48% and 44% respectively). These results further support the suggestion that retail is an experience rather than mere transaction with visitors wishing to enjoy and experience retail spaces.

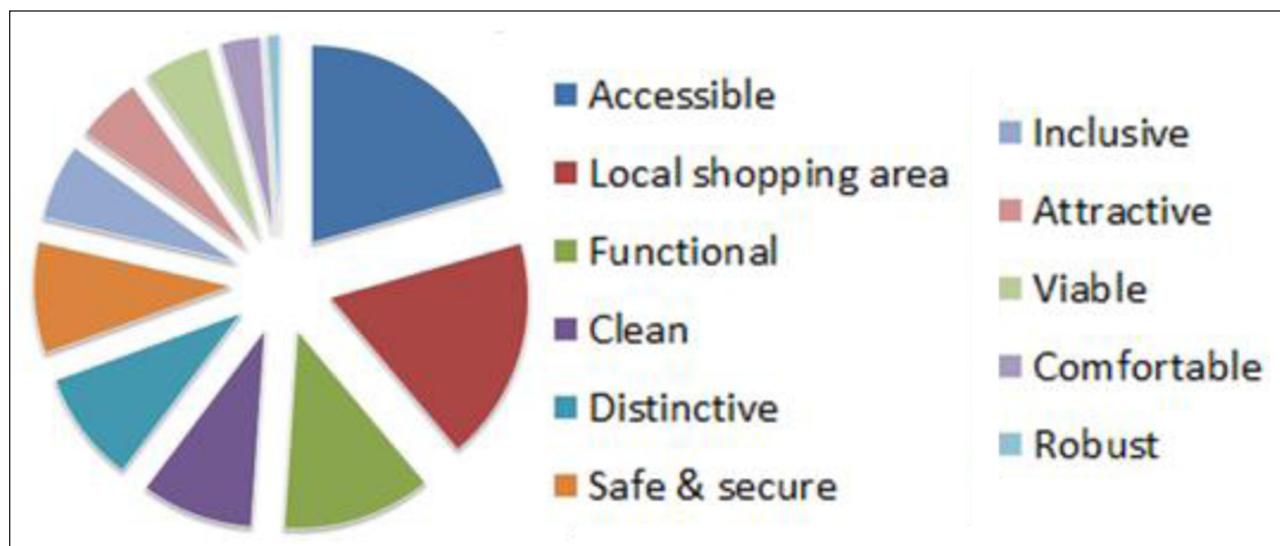
Visitors were asked to specify which qualities they perceived the secondary retail area to have (**Figure 5**), and they predominantly found it to be 'accessible' and a 'local shopping area' (63% and 57% respectively). This is interesting when one considers that **Figure 3** shows businesses ranked accessibility as one of the more important factors impacting on trade, above quality of space. Visitors did not perceive the area to be distinctive, attractive or comfortable. Of particular significance is that only 17% of people considered the sector to be viable and 10% robust, indicating that many people do not envisage this sector as an integral element of the retail circuit but instead a historical edifice, managing to survive rather than flourish.



**Figure 3:** Ranking of impact from urban factors.



**Figure 4:** Importance of factors for visitors' when deciding to visit a retail environment.



**Figure 5:** Visitors' perception of the Southern Bargate sector.

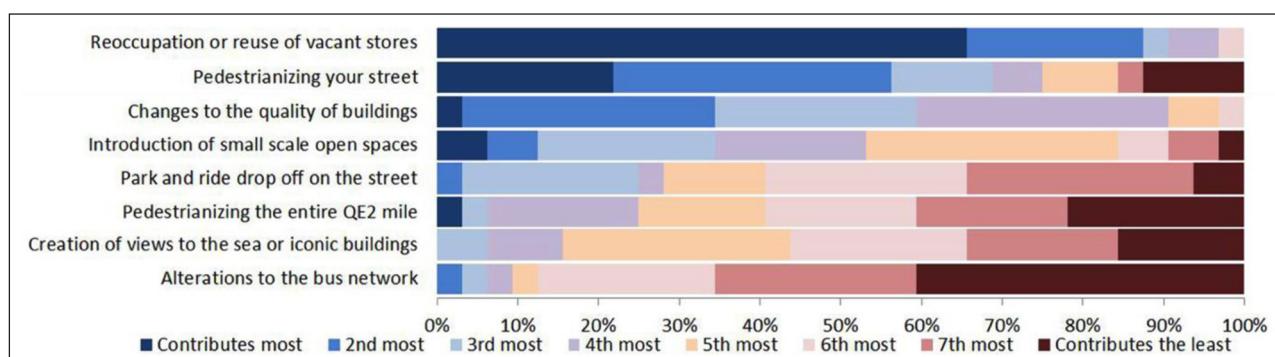
### 4.3. Urban interventions

Retailers were asked to rank a number of interventions regarding their potential impact on their business, **Figure 6** shows that the reoccupation of vacant stores was prioritised with over 60% ranking it as the most important potential intervention for their business. When asked whether they would wish for vacant retail units to be occupied with any activity or have regulations restricting certain usage, 40% wished for restrictions while 60% were in favour of a mixed-use approach. Retailers also showed a preference for improvements to the quality of place, with pedestrianisation and quality of buildings ranked highly. Broad interventions however, such as creation of views to the sea and iconic buildings, were ranked relatively poorly. During interviews retailers were asked if the road were to be closed permanently would they utilise

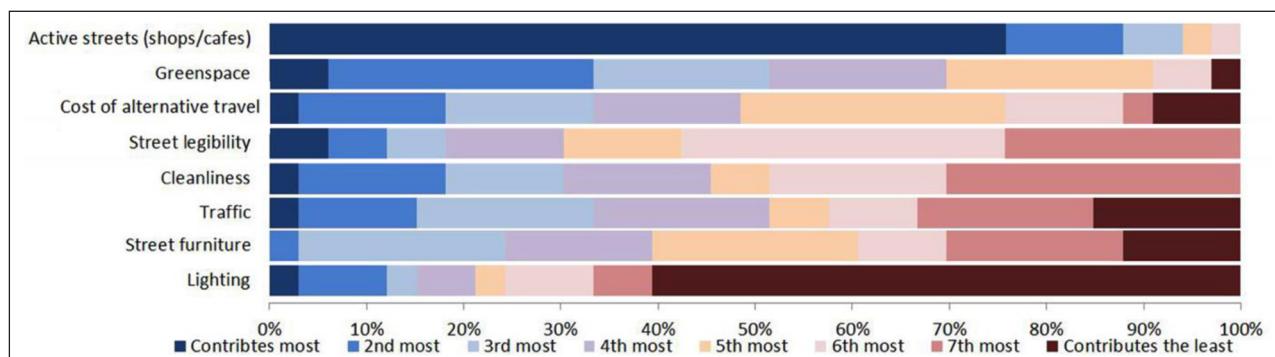
the pedestrian environment and only 18% thought they would. Many (46%) said they would on occasions; however 36% said they never would.

The results above concur with **Figure 7** showing active streets (shops/cafes) to be businesses preferred intervention to attract footfall. Greenspace was also thought of highly, with participants explaining how they would like to see trees planted down the streets as had been undertaken in primary areas.

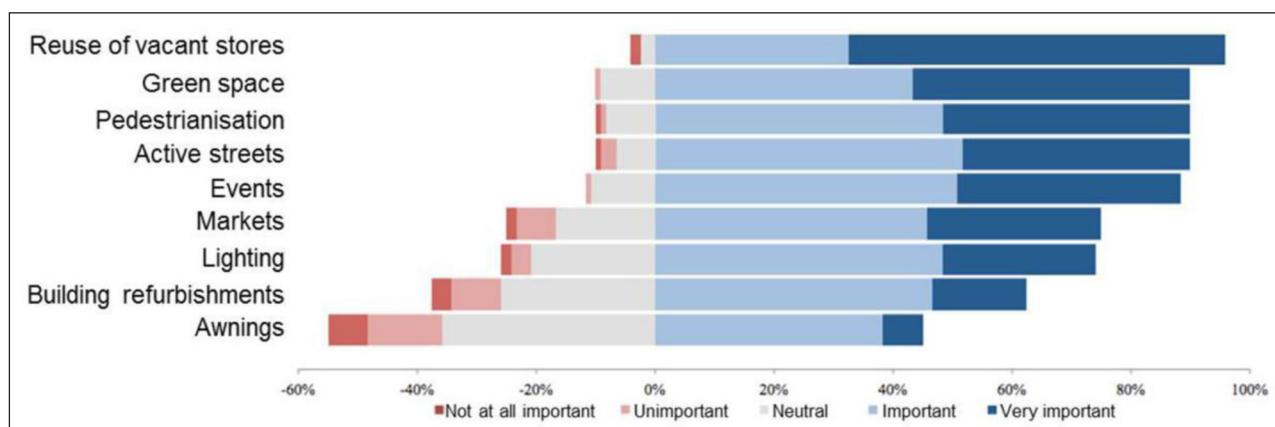
When visitors were asked which interventions were perceived to be most important, the results shown in **Figure 8** reveals that 63% of respondents considered reoccupation or reuse of vacant stores to be very significant, agreeing with the perception of business owners. The visitors perceptions in **Figure 5** showed relatively low importance given to surrounding shops and businesses revealing that



**Figure 6:** Ranking of proposed interventions importance to local businesses.



**Figure 7:** Ranking of interventions to increase foot traffic to local businesses.



**Figure 8:** Visitors' perceived importance of proposed interventions.

vacancies are of far greater concern than shop types, as visitors wish for retail units to be occupied with limited concern given to the store itself. Pedestrianisation was also highly perceived by visitors, as with retailers, with 90% thinking it important. Further similarities between the two were found with visitors giving importance to active streets and markets (90% and 75% respectively). Not many visitors perceived the case study to be attractive, but relatively few considered traditional aesthetic improvements such as awnings and building refurbishments to be important interventions.

Retailers were asked if they attended business association meetings, with only 6 (18%) recording regular attendance, whilst 20 (60%) stated that they had never attended a meeting with 7 stating they attended on occasions. Those that did not attend were asked the reason why and **Table 2** reveals a range of barriers, with many stating that personal objectives (business or leisure) came before the collective. Two businesses revealed that they did not need to go as they were doing well and not reliant upon footfall, while 3 businesses felt they should not attend as it was more efficient to have a few businesses undertake all decisions on behalf of others. When asked what would make them attend meetings, 28% stated that increased involvement from the City Council would have an effect, whereas 40% stated that they would not become involved regardless.

Over half (56%) of retailers ranked traders as the most important stakeholders for regenerating a secondary retail area, however 45% of those businesses had never attended a business association meeting. The city council were considered of high importance by many however the fact that more businesses selected traders shows that they wish to be self-reliant and have confidence in themselves to do so.

## 5. Discussion

### 5.1. Evolving retail environment

The results of visitors' reasons for frequenting retail environments is in agreement with previous research which found that many people visited such areas for non-retail purposes (LSE Cities, 2017; Ozuduru et al., 2014; Stocchi et al., 2016). This multitude of needs (entertainment, dining and socialising) begins to establish the reason for reduced

usage of secondary streets as many of these areas, such as the case study do not cater for the diverse requirements of the post-recession consumer. The findings from visitors preferred urban interventions confirm studies that have shown that 'going to the shops' is no longer purely about retail (CBRE, 2015; Padilla and Eastlick, 2009). Streets are now required to provide a wider customer experience and support social and community (Griffiths et al., 2008; Grimsey, 2012).

The majority of businesses (85%) stated that major changes to the retail core took a month or more to alter visitor behaviour. This in accordance with the model of habit formation put forward by Michie et al. (2014) where it takes time for motivation to alter from predominantly reflective to automatic. This would indicate that any temporary periodical experiential interventions such as festivals and community events may not have lasting impacts due to visitors' entrenched perceptions and routines. For lasting behaviour change there needs to be continual occupation and usage of the space, something that would be costly for governance to support and so should be lead by retailers.

### 5.2. Divide in perceptions of retailers and visitors

For high streets to become more viable they need to adapt to the current and future demands of visitors, however local retailers have been found to be opposed to the notion that change is required (Millington and Ntounis, 2017). The findings revealed that retailers are primarily concerned with static factors of the retail environment such as parking provisions or building facades (**Figures 3** and **6**), in contrast to visitors preference for special and social interventions (**Figures 4** and **8**). Many traders interviewed believed they understood what visitors wanted citing that they talked to members of the public in their shops. Those individuals however have a specific mind-set compared to those shopping on the street or those who do not visit secondary retail areas. This conflict where retailers favour interventions that 'nudge' visitors into retail areas were of least importance to visitors and are considered in behavioural research as limited. Architectonic nudges, which encourage people to alter their movement through temptation, have limited impact in an environment with intense market competition (Warde, 2014), such as a retail area.

**Table 2:** Retailers reasons for not attending business association meetings.

Reasons for not attending	No. of businesses
Busy after work	9
Open late in the evening	5
Traders have no power to enact change	3
Let a few focus on the future of the street	3
Business is destination, does not require footfall	2
Focused on my business, not the retail community	2
No time as working on my business	2
Did not know there was an association	1

This divide in retailers and visitors was also expressed through retailers perceiving changes to the quality of buildings and travel (be it access or parking) as more important than active ones which were favoured by visitors. Many retailers commented during interviews how they experienced little change in footfall when the stores in the nearby Bargate Centre closed, but when the site itself shutdown there was an immediate drop in footfall, showing the impact of connections regardless of their quality. Retailers are heavily influenced by their past and this needs to be considered when intervening as perceived restrictions imposed by an environment can limit behaviour (Speller, 2006). This can create a feeling of helplessness whereby one perceives themselves as having no control of their area (Gifford, 2002).

In addition businesses perceived car parking to be inadequate and considered accessibility to be lacking, in contrast to visitors (**Figure 5**). This once again highlights the divide as visitors are likely to focus on how accessible streets are from their home, whereas businesses will consider a smaller scale, such as ease of access from the high street. Visitors did not perceive parking to be as important as traders, indicating either that parking in the city centre as a whole (once more, traders have a smaller scale of interest compared to visitors) is sufficient, or that parking as a concept is not overly important, relying on alternative forms of mobility. Furthermore, the ease of parking ones vehicle is not a reason in itself to go somewhere, if a place is sufficiently significant then people will travel. Cross-tabulation of visiting frequency and importance of factors for visitors found that those who perceived available car parking and times as very important were far more likely to rarely visit secondary areas than primary areas (67% compared to 37%). This however was only 23% of visitors surveyed, and city centre areas should move beyond drop-off visitors and focus on the majority that wished for open public spaces and activity (**Figure 4**). This misunderstanding of the general retail consumer was present in interviews where retailers stated that they targeted older visitors, believing them to have a greater potential income and thus being of most influence to their revenue. The findings in **Figure 2** however suggest that the 18–29 demographic needs to be targeted due to their propensity for regular repeated custom in primary areas. This concurs with research which has shown those aged 18–29 (Generation Y) are more willing to make impulse purchases (NRF Foundation, 2014).

### 5.3. Divide in perceptions of retailers

The complexity in the relationships and differing perceptions and behaviours of stakeholders goes beyond the divide between retailers and visitors as the traders themselves are also split. It is interesting to note that a number of specialist businesses have not been severely affected by the areas poor condition. Secondary areas are described as providing enhanced opportunities for new businesses (GVA, 2015; Harris, 2015) however established retailers in the case study were found to only require limited footfall. Businesses had relocated to the area because they only wanted to target specific customers, acting as a destination. Retailers situ-

ated in streets with less than 50% pedestrian priority surfaces were found to rank pedestrianisation lower than those in pedestrianised areas as they perceived the road to be an asset for drive-by purchases. Store type was also a varying factor, with charities opposed to pedestrianisation as they required vehicular drop-offs, whilst cafés and restaurants were found to favour such a scheme. Retailers were shown to be mixed over whether to utilise a pedestrianised area and this would allow a free opportunity to strengthen the link between their environment, creating a living space to meet visitor needs (Gehl et al., 2006; Machado et al., 2013). If however they are unwilling to occupy the space and create this connection, the merit of such a scheme is diminished. This unwillingness to change was also shown by the 36% of traders unwilling to alter trading hours (something 85% of visitors were in favour of). This can be understood with independents less flexible and often operated by a single individual (British Retail Consortium, 2016), however one must consider that those participating in the survey were predominantly more enthusiastic traders, willing to spend time on regenerating the sector and so if altering trading hours were to be pursued it is likely that a greater percentage would not follow suit. If a large proportion of retailers were not to undertake the initiative there would be an increase in closed businesses, making the area appear less desirable. These findings revealed that a large proportion of retailers were opposed to any changes to their default behaviour. Economic theory states that people act with rational self-interest, opposed to change while living in the moment, reliant upon memories (Samson, 2014). This uncertainty appears to be a major factor, with many retailers swayed by memories of past changes to the environment leading to falls in footfall. Subsequently they are more inclined to opt for a continuation of the norm, where no current behaviours for retailers and most importantly visitors are restricted, as they perceive that consumers have a preference to adjust rather than adapt, as they have witnessed this in the past. This fear of uncertainty can also explain why retailers ranked larger scale interventions poorly and preferred static interventions over active and spatial improvements (**Figures 3 and 6**).

This divide in retailers was further emphasised by 40% wishing to restrict vacant retail usage which gives a reason for why these areas remain the same as there are two fundamentally different population groups. Despite prioritising interventions for vacant stores (**Figures 3 and 6**) many retailers wished to pursue the default, even though they had stated it not to be working. The divide in retailers wishing to attend trader association meetings is also a concern as it has been reported that improved communication among stakeholders allows a retail area to better respond to visitors (Machado et al., 2013; Medway et al., 2000). Difficulty in attending meetings can be understood due to limitation for SMEs with previous research showing that many traders find it difficult to collaborate with each other due to financial and time constraints (Hall, 2015; LSE Cities, 2017) however the finding that 40% would never attend regardless of incentives is troubling as Hall (2015) states, business associations are places where retailers are able to engage in change.

Interviews found retailers to be highly dissatisfied, however this has not prompted grassroots action, instead many have become opposed to drastic change. This fear of uncertainty can be understood, but if businesses are unwilling to change their behaviour it is difficult to suggest governance invest in reinvigorating retail spaces as for consumers to change their visiting behaviour they require retailers to change. Secondary areas need to promote adaptability and flexible mixed-usage of space and research from the HS2020 project in Market Rasen (Theodoridis et al., 2017, p. 386) has shown that without stakeholders agreement on the regeneration approach any change implemented will be short-lived. To develop a shared understanding of regeneration, and to promote organic change and take pressure away from top-down methods secondary areas need to be understood at an individual scale to understand the perceptions and behaviours of those occupying the space.

## 6. Conclusions

While there has been much work on classifying retail centres (Andres Coca-Stefaniak, 2013; Quin, 2016), this study has shown the conflicts that arise within. Other secondary streets will differ and to determine the typology of a retail street would assist in determining what measures should be taken. In a primary retail street almost all shops are large chains, however in secondary streets there is a greater mix of typologies and so a classification of secondary retail streets akin to those for entire retail centres, should be researched further. Added to this, there is currently no key performance indicator that measures retailers' behaviour and willingness to adapt. If practice is able to understand the specific dynamics of the retail area they may be able to enact sustainable change as they will have a greater understanding of retailer response.

This study has shown the challenges of engaging with retailers and visitors and the complexity of undertaking interventions in the interest of all parties. Visitors have shown that they require improvement to secondary retail environments beyond the aesthetic but this can only be achieved through retailers adapting their offering. Governance invests in a retail area in order to stimulate retailers to inhabit and connect their premises with the street creating a more diverse environment. In certain environments traders may be willing to adapt as a group but if the stakeholders have developed a level of helplessness an alternate approach is required. The implementation of temporary small-scale interventions, trialling schemes such as pedestrianisation, would educate and broaden retailers. If stakeholders see how their environment can be adapted they may have an increased desire to take ownership of the street and become more willing to adapt assisting in a more collaborative approach to the regeneration of secondary areas.

Enforcing a regeneration strategy that does not match the area is not an adaptable solution, whereby past history and retail typology are key determinants on retailers thinking and as a result, behaviour. Portas (2011) stated that one cannot and should not endeavour to save every retail street and before intervening, one needs to

determine whether secondary areas are satisfying specific requirements and are adaptable to the changing nature of retail and the diverse requirements of visitors. By determining the capacities and perceptions of stakeholders one can discern the appropriateness of interventions understanding whether a secondary area requires enhanced opportunities or capabilities to enact and support sustainable regeneration.

## Note

<sup>1</sup> Censuses of the two shopping centres were undertaken in April 2015 and they were used for comparison as they were the largest inner-city shopping centres to follow West Quay with Basingstoke's Festival Place (93,903 m<sup>2</sup>) opening in October 2002 and then Birmingham's Bullring (115,200 m<sup>2</sup>) opening in September 2003.

## Acknowledgements

This work is part of the activities of the Energy and Climate Change Division and the Sustainable Energy Research Group at the University of Southampton ([www.energy.soton.ac.uk](http://www.energy.soton.ac.uk)). It is also supported by EPSRC under grants: EP/J017698/1, Transforming the Engineering of Cities to Deliver Societal and Planetary Wellbeing, EP/N010779/1, City-Wide Analysis to Propel Cities towards Resource Efficiency and Better Wellbeing and EP/K012347/1, International Centre for Infrastructure Futures (ICIF).

## Competing Interests

The authors have no competing interests to declare.

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**How to cite this article:** Turner, P, Bahaj, A and Teli, D. 2018. Aspirations of Retailers and Visitors Towards the Regeneration of Declining Streets in Cities. *Future Cities and Environment*, 4(1): 14, 1–12, DOI: <https://doi.org/10.5334/fce.45>

**Submitted:** 21 March 2018

**Accepted:** 01 June 2018

**Published:** 15 June 2018

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