National Retail Planning Forum

SECONDARY SHOPPING:

RETAIL CAPACITY AND NEED -A SCOPING PAPER

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INTRODUCTION

1.1 The National Retail Planning Forum (the NRPF) commissioned Roger Tym & Partners to produce this scoping paper in order to facilitate follow-on research. We have focused on issues relating to the interface between the operation of the planning system and the capacity or need for different types of secondary shopping. The NRPF is particularly interested in:

- the current and future role of secondary shopping at different levels of the retail hierarchy — secondary areas of town centres, district centres and local centres;
- the extent to which market failure exists and whether it is possible, or desirable, to manage the promotion and decline of different types of secondary shopping locations; and
- the capacity for different types of secondary shopping location, taking account of changes in government policies with respect to the use of the car and charges in technology, particularly e tailing.

1.2 The purpose of the scoping paper is not to provide answers to these issues, but to advise on the extent to which they can be answered by further research and what the future research priorities should be.

1.3 At the outset, we advised that there is a need to develop an analytical framework, prior to undertaking future research. The framework, amongst other things, should help to:

- define ‘secondary shopping’, distinguishing between secondary shopping towns and secondary shopping areas, and then between ‘place’ and ‘activity’;
- assess the causal factors which have resulted in the so-called ‘polarisation’ trend, whereby the larger centres in the retail hierarchy have attracted investment and gained market share at the expense of the smaller towns, district and local centres; and to
- assess whether market failure can be proven to the extent that public sector intervention, particularly through the land use planning system, is justified on the basis of the socio-economic and environmental externalities arising from the market failure.

1.4 The latter is critical; it is of key importance to understand if the market has failed, what the problems are and whether these problems be resolved through the operation of the planning system, or through other forms of public sector intervention.

1.5 The remainder of the paper is structured as follows:

- Section 2 provides an overview of the research which has been undertaken;
- Section 3 sets out our recommended research priorities; and
- Section 4 makes some suggestions with respect to the next steps in the research process.

2 LITERATURE REViEW

2.1 In undertaking the literature review we have been assisted by the Department of Retailing and Marketing at the Manchester Metropolitan University. The bibliography is set out in Appendix 1. We have used both academic and trade press databases.

2.2 The brief helpfully draws the distinction between place — town centre fringe, district centre, local centre and activity — grocery shopping, other convenience shopping and comparison goods purchases from independent retailers. Nevertheless, the literature review confirms fourfundamental points:

I) no adequate definition of 'secondary shopping' appears to exist;

ii) there has been very little direct research into the issue of secondary shopping, with most commentary found to be anecdotal, or as a result of spin-off from other research programmes;

iii) most of the direct research which has been undertaken in relation to secondary shopping pre-dates the acceleration of out-of-centre development which commenced in the late 1970's, and which caused a change in the focus of research to the issues relating to the impact of out-of-centre formats on town centres as a whole; and

iv) many commentators have suggested that the disproportionate amount of investment which has occurred in prime town centre redevelopments in the mid to late 1990's has caused highly competitive effects on secondary areas, sometimes in a similar way to the out-of-centre competition.

The Consequences of Decentraiisatian

2.3 Schiller (1986) identified three waves of decentralisation:

- the first involved the development of over 700 food superstores In out-of-centre locations from the late 1970's to 1994;
- the second involved the development of out-of-centre retail parks aimed primarily at retailers of bulky goods such as DIY, furniture and carpets; and
- the third involved the development of out-of-centre regional shopping centres for comparison goods retailers and leisure operators.

2.4 Other commentators, particularly Femie, have identified the development of factory outlet centres, or designer malls, as the fourth phase, but the flow of outlet centres has been reduced by the change in government policy since 1993. The key point, however, is that decentralisation has been almost exclusively a movement of multiple retailers. There have been significant consequences for the independent retailers left behind. For example:

- the overall number of single outlet retailers has declined by nine per cent from 225,900 businesses in 1980 to 205,600 in 1991, and the decline is particularly pronounced in the food sector with the number of single outlet operators falling from 81,835 to 1980 to 56,440 in 1991, a decline of 31 per cent;1

- by 1993, 39 per cent of all English parishes had no permanent shop (RDC, 1993); and

Source ONS SDA2S Business Monitor Retailing

- the market share of single outlet retailers had declined from 32 per cent of national turnover in 1990 to 25 per cent of national turnover in 1991 .2

2.5 These fundamental changes in the structure of retailing and the leisure industry will have had differential impacts on different types of secondary location. However, there has been very little direct research into these differential impacts, apart perhaps from the work undertaken by CB Hillier Parker in relation to the impact of large foodstores on market towns and district centres. However, even this research acknowledged that impacts '... will vanj depending on the particular concerns facing these centres'.

Types of Secondary Location

Town Centre Fringe

2.6 Retailers, planners and property agents usually talk of secondary locations without differentiation, other than that they are peripheral to 'prime locations'. This is unfortunate in that earlier research in Newcastle-upon-Tyne (Davies and Bennison, 1978) found that different types of secondary streets were performing different types of functions. Moreover, the same researchers found that secondary streets are the first to suffer the competitive effects of new deveIopment, whether the latter is located within the centre or outside it.

2.7 The concern with the competitive effects of out-of-centre development led to a switch in policy in the 1993 version of PPG 6, away from 'laissez-faire' to a more balanced approach. This was soon followed by PPG 13 (1994) and then by the 1996 version of PPG 6, which moved decisively against out-of-centre development with the confirmation of the sequential approach. The early to mid 1990's also witnessed a major impetus to the town centre management movement (1CM), although this typically involved partnerships between the public sector, the major multiple retailers and the major town centre property investors. TCM's focus of concern was the regeneration of town centres as a whole, rather than an attempt to improve secondary shopping areas per se or to seek to look after the interests of independent retailers of convenience and specialist comparison goods. Moreover, the focus of concern of many 1CM stakeholders has recently shifted to the assessment of the effectiveness or otherwise of such schemes, given the considerable amounts of money pumped into them by the multiples.

2.8 Whatever the policy climate, however, it seems that there has always been a demand and a need for secondary shopping streets in town centres. Many independent comparison traders retail specialist goods, but with turnovers and profit margins which are unable to support prime rental values. Where successful regeneration of such streets occurs, there is often a displacement issue as a result of impact on rental values. However, there has been little or no systematic research on this issue.

District Centres

2.9 District centres typically provide a range of retail, leisure and other services, but they are usually anchored by a fcod supermarket. The Somerfield and Kwik Save facias are particularly associated with district centres, with over 1,200 outlets remaining despite their merger. These and other smaller operators such as the Coop have been increasingly squeezed by the growth in market penetration of the big five food retailers — Tesco, Asda, Sainsbury, Safeway and Morrisons.

2.10 However, the change of national planning policy climate has caused renewed retailer interest, not only in free-standing rural district centres, but also in urban district centres. Investment interest in the latter reflects the current focus on urban containment and the urban renaissance advantages arising from the development of polycentric urban areas, as advocated by the Urban Task Force and the European Spatial Development Perspective.

2 Source ONS SDA25 Business Monitor Retailing

2.11 Moreover, the interest of the Competition Commission in relation to food retailing, and press interest in local food monopolies is likely to exert further pressure for renewed interest by the leading food retailers in developing smaller stores in district centres.

Local Centres

2.12 There has been little recent **work that** has tackled the specific issues of local shopping and local shops. The latter may be defined as those selling predominantly lower order goods to customers living within a convenient travelling distance of the retail premises — **a** definition which may apply to both urban and rural situations. Thus, although Smith and Sparks (2000) have investigated the role and function of the independent small shop in Scotland, their definition included small shops selling higher order goods. Peston and Ennew (1998) draw the distinction between 'convenience stores', which are part of a chain and 'neighbourhood stores', which are independently owned. They suggest that the latter have potential to further develop home delivery services.

2.13 The now defunct Rural Development Commission has documented the decline of village shops across England and has provided good practice advice for traders. The Village Retail Services Agency (VIRSA) and the Countryside Agency have also helped to develop good practice projects, such as the village shop in Litton in the Derbyshire Peak District

2.14 The leading national food retailers have also recently developed a strong interest in local shopping, with Sainsbury and Somerfield supplying their own brand products to village shopkeepers. Sainsbury has stated that it intends to open 200 convenience 'local' stores by 2002, although only eight have opened to date.

2.15 Despite these initiatives, however, the role of local shopping has been neglected in the academic literature. The NRPF's research interest is therefore particularly timely.

Secondary **Shopping** Activity

2.16 Secondary shopping activity is concerned with the purchase of convenience-type goods, whether groceries or lower order comparison purchases. The Institute of Grocery Distribution (IGD) suggests that 'convenience'; is a mode of shopping, rather than a type of shop, so that can take place in a variety of locations — local shops, local centres district centres, petrol stations and town and city centre supermarkets. The IGD identifies three types of convenience shopping behaviour.

- top-up shopping buying general groceries between major shops;
- 'distress' shopping — a sudden unexpected requirement for a specific item; and
- impulse shopping — unplanned purchases for 'treats'.

2.17 However, there has been little academic research into secondary shopping activity as a mode of shopping, although Thomas 1993 found that '... car ownership is a principal determinant of major variations in shopping behaviour'. This suggests that transport policy which increasingly seeks to deter demand for car travel could have important implications for the future need or capacity for retail space arising from secondary shopping activity.

2.18 The new discount retailers — Aldi, Lidl and Netto — may have had the potential to alter secondary shopping actMty by encouraging two-stop shopping — a major visit to a supermarket, followed by a top
• up of certain lines in the discount outlet However, this phenomenon has not be researched in detail and evidence remains anecdotal.

2.19 In addition, the Tesco Metro and Sainsburj Central formats in city and town centres have been targeted by workers on lunch breaks and on the journey home. These formats have enabled the major operators to defend their market shares, whilst at the same time being more likely to comply with planning policy.

2.20 However, there is a big debate concerning the potential future impact on secondary shopping activity — and in turn on the demand, or need for secondary shopping floorspace — which is likely to arise from the e-tailing revolution. All of the leading food retailers are aiming to expand their home delivery services, but attempts to quantify the extent of the potential market have proved, so far, to be fraught with difficulty. E-tailing also has significant potential for specialist independent traders, provided their goods are suited to the medium. However, others have emphasised that the goods likely to be affected most — books, CD's and food tend to be retailed from prime locations so that the impact on secondary areas may not be as great as feared.

Conclusion

2.21 There has been very little direct research into secondary shopping locations, or into secondary shopping as an activity. We turn now to our recommendations for research priorities.

3 RESEARCH PRIORITIES

3.1 Given the absence of academic research into secondary shopping over the past 15 to 20 years, there are huge gaps in knowledge. However, the greatest difficulty we have faced in drafting the scoping paper has been the absence of a theoretical framework for assessing the issues and the tack of definition of the secondary shopping 'problem'. There has always been secondary shopping in urban areas and these evolve from generation to generation in response to market forces, so does market failure exist, and what evidence is there to suggest that the aggregate supply of secondary shopping areas are growing, or that they are in excess of demand? Furthermore, the 'problem' needs to be defined for different types of secondary shopping location and for different types of secondary shopping activity.

3.2 Given the lack of definition of the 'problem', it is hardly surprising that shopping need, or capacity stud ies very rarely give specific consideration to the demand for secondary shopping locations, although such studies often conclude that district and local centres should be consolidated, or provision made for their contraction by encouraging non-retail uses.

3.3 Moreover, much of the anecdotal evidence is yet to be proven. For example, it is frequently asserted that a polarisaflon process is occurring in most regions, whereby the larger centres are growing stronger at the expense of the weak. We have undertaken some preliminary testing of this hypothesis for the North West the West Midlands and the South East. This has been achieved by comparing the size of each of the centres in each region as measured by the Management Horizons index — with the average prime yield for each centre in 1999, and with the percentage change in average yield from 1994 to 1999. Wefound that

- there appears to be a statistically significant correlation co-efficient in each region for size of centre compared to current yield — the larger the centre, the lower the yield, as expected; but that

- there is no statistically significant relationship between size of centre and percentage change in yield — which would be expected if the polarisation trend is significant — although there is a weak relationship which suggests that yields in th e North West and West Midlands have improved more in the larger centres than in me smaller centres.

3.4 We recommend, therefore, that the first research priority after sorting out matters of definition matters with respect to 'place' and 'activity' should be to develop a series of hypotheses for subsequent testing. For example, the one hypothesis in relation to secondary shopping locations might be that there is an excess of supply of secondary shopping tioorspace in town centres and that this situation has arisen precisely because of interference in the market by the planning system — which often seeks to protect units from change of use. Conversely, it could be argued that the over-supply is a reflection of a planning system which has insufficient compulsory purchase powers, or whatever.

3.5 So far as secondary shopping as an activity is concerned, one hypothesis might be that apparent consumer preferences for, say, shopping in local centres is more a reflection of car ownership and other socio-economic constraints than actual choice. Conversely, it could be hypothesised that the apparent preference of the majority for shopping in food superstores is merely a reflection of the lack of choice of alternatives in the local area, as a result of the earlier competitive impact of the superstores.

3.6 In short, we consider that the topic of 'secondary shopping' is too extensive to tackle as one subject. The issues need to be disaggregated in order to be investigated properly.

3.7 Particular research priorities should include:

- the medium to long term impact on demand for secondary shopping activity as a result of changes in transport policy;

- the impact of e-tailing on different types of products;
- the role of specialist ethnic retailing, particularly in suburban district centres;
- the potential role of community development partnerships in promoting local loyalty initiatives and community enterprise schemes which may involve local credit unions;
- making distinctions between the role of district centres within large urban areas and free-standing rural district centres;
- **how** local retail strategies could be made to integrate with, and compliment, local/neighbourhood regeneration strategies which are being promoted by Policy Action Team 4 (PAT 4, neighbourhood management) of the Social Exclusion Unit;
- the relationship between the performance of secondary retail locations within major urban areas and neighbourhood crime;
- the fiscal measures which may help manage secondary shopping areas, such as revisions to business rates, changes in investment policy on the part of banks and other city institutions and the small loans guarantee scheme operated **by the Social** Exclusion Unit's Policy Action Team (PAT 3, business); and
- how the planning system can most usefully react to the problems identified during the first stage of the subsequent research.

4 NEXT **STEPS**

4.1 We have concluded that the topic 'secondary shopping' is too vast to tackle as one subject. There is clearly a necessity to distinguish between the planning considerations affecting the demand for secondary retail accommodation in the fringe areas of large town and city centres, compared to the issues faced in urban district centres, which, in turn, will be different to the issues faced by district and local centres in rural areas. Similarly, the issues will differ for different types of secondary shopping activity, particularly the distinction between grocery shopping and comparison purchases from independent traders.

4.2 We have also concluded that the 'problem' of secondary shopping has been insufficiently defined, or developed. It may be useful, therefore, to use the seminar to be held on 20 June 2000, to help to develop some hypotheses for subsequent testing. We could also invite feedback on the practicality of measuring the extent to which the overall quantum of secondary shopping provision, particularly within cities and major urban areas, has grown as a result of the relatively relaxed planning climate which prevailed up to 1993; and the extent to which the current policy climate — with its emphasis on urban containment mixed-uses and residential development in town centres — may help to bring the supply and demand for secondary floorspace more into balance.

4.3 We propose to use the time between now and the 20 June 2000 to obtain some feedback on this paper from a range of retailers, town centre managers and town planners, with which we have regular contact

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(APPENDIX – COMMISSIONING STATEMENT)
National Retail Planning Forum
Secondary shopping scoping research brief
Retail capacity and need

Obj ective
An NRPF Steering Group has been set up to identify priority research issues in relation to secondary shopping, and ultimately to commission targeted research. As part of this process it is intended to undertake two scoping studies to identify priority areas of focus for subsequent major research projects.

One scoping paper will consider the effect of retail capacity and need on secondary shopping (the subject of this brief), while the other reviews town centre dynamics.

Terms of reference
For present purposes it would be unhelpful to be overly prescriptive in the definition of 'secondary' shopping. The tenn may relate to place or activity. The following are regarded as falling within the terms of reference for the anticipated scoping papers.

In terms of **place** the emphasis should be on:

- town centre fringe;
- district centres; and
- local shopping.

In terms of **activity** the emphasis should be on:

- retail mix dominated by convenience shopping and/or independent comparison retailers

The scoping paper should include:

- a literature review, outlining the contribution of past research to an understanding of the issues highlighted;
- an analysis of strengths and weaknesses in available knowledge of these issues amongst

  planning practitioners, retailers and other investors;
- an assessment of the effectiveness of planning policy in the context of these issues;
- recommended research priorities to address current policy weaknesses (including any relevant topics not already highlighted by the Steering Group); and
- recommended research methodologies for follow-up studies

Main areas of emphasis

1 What role does secondary shopping currently fulfil in the retail hierarchy? In particular, what is the role of
- small towns;
- district centres; and
- neighbourhood shopping?

2 How might this role change
- in the medium term; and
- in the long term?

3 Do shopping capacity studies for new developments adequately consider the impact on
- fringe parts of major centres;
- smaller towns within the catchment of major centres; and
- district/neighbourhood centres within a town?

4 To what extent is it possible (or desirable) to manage the promotion and decline of shopping locations in the retail hierarchy?

5 How much secondary shopping currently exists and how much is needed at different levels in the retail hierarchy?

6 To what extent are food superstores (including hard discounters) and the major operators' new 'local' formats a suitable substitute for traditional forms of local convenience shopping?

Full answers to the above questions are clearly beyond the remit of a scoping paper. The emphasis at this stage should be on determining the extent to which the above questions ***can*** be answered, with an indication of how this might be achieved. Where the available information is limited, the practicality and priority of plugging information gaps should be considered.

The researchers appointed to undertake these scoping studies should have specialist knowledge in the areas identified, and be prepared to offer their own considered views, as well as drawing on the views of others.

The commissioning of the scoping studies and their output will be monitored and reviewed by the Steering Group.

Timetable

The NRPF Board is anxious to progress with this scoping research quickly in order to initiate the follow-on research as soon as possible. As such, the scoping papers will be required for the Board's consideration by Friday 9 June 2000.