

The National Retail Planning Forum

Secondary Shopping TOWN CENTRE DYNAMICS A

Research Scoping Paper

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INTRODUCTION

1. We were instructed in May 2000 to prepare a 'Research Scoping Paper' which considers the effect of town centre dynamics on secondary shopping. This Paper complements another such Paper on 'Retail Capacity and Need' in relation to secondary shopping, prepared by Roger Tym & Partners. The overall aim of both Papers is to assist the NRPF to identify research priorities in relation to secondary shopping, and ultimately to commission targeted research. The work set out in this Paper is our response to the 'research outline' prepared by the NRPF.
2. It is not clear to us from the research outline why the NRPF has chosen to study this topic. Reading 'between the lines' of the research outline suggests that the NRPF perceives there to be a lack of knowledge of the subject. However, it does not spell out why there may be a need to fill this gap, or what problems are occurring as a result of the lack of knowledge. Our assessment is that there may be a perception that 'the market' is failing to maintain the quality and performance of secondary shopping areas; and that policy responses by government and local planning authorities to this perceived failure may not be adequate or appropriate.
3. The research outline loosely categorises secondary shopping as:
 - Town centre fringe
 - District centres, and
 - Local shopping.

It does not include the town centres of small towns and villages, eg 'market towns', about which there is currently a lively debate elsewhere. Thus the loose definition applies mainly to larger towns and cities, ie those which are large enough to have identifiable prime and secondary shopping streets, and separate district centres, and local shopping in addition to the town centre. In relation to this Paper on Town Centre Dynamics, the first category identified by the NRPF (town centre fringe) is the most relevant; and we have concentrated mainly on it. District centres and local shopping may be affected by the dynamics of what happens in town centres; but more in relation to retail capacity and impact, than to policies for development, regeneration and management within town centres.

4. Before proceeding further, it is useful to review briefly the historical context of the present situation. In previous centuries, when populations were much smaller, and the general standard of living was much lower, there were far fewer goods and services available to the general public, and town centres were smaller and more compact than they are today. Put simply, there were far fewer shops; and those were often concentrated around an historic market square or important cross roads. All were within easy walking distance of each other, so whilst location on the Square or High Street was important (rather than elsewhere), it did not matter too much where on the High Street or Square a shop was located. In the late 19th and 20th centuries however, massive urban growth and unprecedented growth in the availability of goods and services, meant that town centres also grew dramatically. The result was that location within a town centre became increasingly important to business prosperity; and differential retail property markets

developed in recognition of the advantages of the most favoured retail locations within a town centre.

5. Into this situation came three major innovations which had a profound effect on shopping patterns. Two of these were technological, and the other was social/economic. The two technological innovations were the motor car and refrigeration; whilst the social/economic one was greatly increased female employment. Thus, in former days, men were the breadwinners and women kept house; and women had to shop nearly every day for perishable foods, on foot, and in their nearest local shops. Now however, distance is not an obstacle, neither is storage of perishable foods but time and convenience are at a premium. The result has been the massive growth of large food superstores, located for maximum car accessibility, and catering for the bulky weekly or fortnightly shop by offering everything under one roof. In consequence, historic local shopping parades and indeed town centres in large and small towns, have seen a substantial decline in their local food and convenience goods shops. In town centres, these have been replaced by durable goods shops; but in local shopping areas, the loss of these historic 'anchor' retailers has resulted in high vacancy, change of use to non-retail uses, and decay and demolition.
6. For superstores, accessibility by car is key; and in a town where there is more than one, they will tend to have overlapping town-wide catchment areas. So post war hierarchical principles of town planning, based on town, district and local centres have broken down under the onslaught of the motorcar, and its servant the superstore. Whilst local parades and corner shops can often still survive on walk-in and quick-stop passing trade, the planned district centre is the level in the hierarchy which has come under the most pressure as a result of these trends. Unless they are anchored by a full range superstore, district centres tend to be fragile as retail centres — although they can provide important low cost accommodation for specialist 'destination retailers' (eg a company selling parts for classic sports cars, or catering for an esoteric hobby), which have a wide catchment area.
7. In most towns, the response of the local planning authority has been to try to 'have its cake and eat it'. In other words, free standing out of centre superstores have been permitted, but maintenance of district centres is retained as an important policy objective; despite that fact that the former tends to make the latter obsolete. That may not matter if the Local Plan is flexible to permit change of use to non-retail uses within the district centres, so that they can evolve in accordance with market forces, and find a new role. In many Local Plans, that is not the case. Similarly in town centres, most Local Plans define primary and secondary retail frontages, and then proscribe change of use to non-retail uses, or the degree of such change which will be permissible, even in the defined secondary areas. This suggests that the policy response to the retail trends we have outlined needs to be overhauled, if change is to be harnessed for good, and depressed secondary shopping areas regenerated. Our work in this Paper therefore approaches the subject of Town Centre Dynamics and Secondary Shopping from the point of view of regeneration and enhancement, rather than from analysis and knowledge for its own sake. Our emphasis is on the research needed as the basis for regeneration, and for defining an appropriate policy response to identified problems, so that town centres as a whole can function optimally, and district and local centres genuinely serve local needs.

8. Following this introduction, we set out the results of our literature review. We then discuss the issues and questions in the NRPF's research outline. This is followed by our suggested research brief, in which we describe the priorities for further research. The Paper ends with our overall recommendations for the commissioning of further research.

LITERATURE REVIEW

9. Within the time and budget available for preparing this Paper, it has not been possible to undertake a comprehensive review of all literature relating to secondary shopping. Instead, in accordance with the approach outlined above, we have focused mainly on the key studies, reports and policy documents which have shaped the approach to retail and town centre planning, regeneration and management over about the last ten years. These have been considered in broad chronological order. They represent an up to date and evolving body of knowledge and best practice, which post dates the 'step change' in shopping patterns outlined above. They are listed in full in the accompanying Bibliography.
10. First of these was 'Vital and Viable Town Centres — Meeting the Challenge'¹⁾, commissioned by the Department of the Environment. It was intended to research and provide a framework for best practice in town centre enhancement and regeneration. Its commissioning was the result of a recognition in government that out of centre shopping had been let rip and was starting to cause problems for town centres — problems which were compounded by the then deep recession. That recognition also resulted in the publication of the previous version of PPG6 of July 1993⁽²⁾, which was produced in parallel with the research, and drew upon it.
11. 'Vital and Viable Town Centres' concluded (inter alia) that the keys to town centre prosperity lay in the four A's, viz Attractions, Accessibility, Amenity and Action; and that these should form a framework for evaluation of town centres and the basis for strategies and action plans for town centre improvement. Thus it proposed town centre 'health checks' to establish the vitality and viability of town centres, and described potential indicators to be measured as part of this process. Some of the indicators were adopted by government, and included in Figure 1 of PPG6 of July 1993; which for the first time set out in government policy guidance a method of measuring and monitoring town centre performance.
12. Clearly this was a substantial step forward. However, the indicators suggested, and incorporated in that version of PPG6, were focused somewhat more on prime rather than secondary shopping. Thus Fig 1 of previous PPG6 refers to shop vacancies in the prime retail area. In the current version of PPG6 (June 1996) (3) the guidance in Fig 1 on indicators of vitality and viability is slightly more balanced. It refers to prime shop rents, but also vacancies in prime and secondary shopping areas. 'Vital and Viable Town Centres' was concerned with town centres as a whole, and did not examine the differences in performance between prime and secondary shopping streets in the town centre, or concern itself with the health of district or local centres although in categorising town centres it did distinguish 'suburban centres' (in metropolitan areas) as a separate category.

13. In 1993-4, the House of Commons Environment Committee undertook a wide ranging inquiry into retail planning and development. This was based on the consideration of evidence submitted by interested parties, many of whom were also questioned in person by the Committee. The Committee also appointed its own specialist retail advisors, and went on a number of study tours. The result, published in October 1994 as 'Shopping Centres And Their Future'⁽⁴⁾ was a set of conclusions and recommendations to government covering most aspects of retail planning and development. However, within the wide ranging report, there was little examination of the role and function of secondary shopping. The Committee did conclude that 'there is a need for a more proactive approach to addressing the shrinkage of retail functions and areas in town centres. We recommend that the Department, local authorities and the retail profession work in partnership to identify different roles for declining town centres and to develop policy in this field' (paragraph 102).
14. The 'Government's Response'⁽⁵⁾ was published in February 1995. In relation to paragraph 102, it stated that 'The task for finding new roles for declining town centres is essentially a local matter' (paragraph 93). It then went on to set out the government's approach of deregulation to facilitate changes of use within declining shopping areas; and its desire to promote mixed-use developments in town centres (paragraphs 94 and 95). No further research was undertaken or promised in relation to this issue.
15. The current version of PPG6 was published in June 1996. The major change from the previous version was the introduction of the sequential approach to the location of new retail development, and refinement of the tests to be applied to proposed new developments in assessing potential harm which they might cause to town centres. Secondary shopping was not specifically dealt with in any detail; and district and local centres were third in the sequence of acceptable locations under the sequential approach, after town centre and edge of centre sites. The indicators of vitality and viability set out in Figure 1 were refined, and vacancy in secondary shopping areas as well as in prime areas introduced. Overall, there was a greater emphasis on diversity of uses comprising a 'critical mass' of attractions in a town centre, thus reducing the need to travel, and enabling one trip to serve several purposes — which are important planks of sustainability policy. This potentially places a greater emphasis on the value of secondary shopping in a town centre, to provide for needs which cannot be met in the prime retail areas.
16. In November 1996, the BCSC published the results of its commissioned research into 'Town Centre Futures: The Long Term Impact of New Developments'⁽⁶⁾ This looked at a number of case study towns over a fifteen year period from 1980 to **1985**, to try to establish the causes and consequences of the observed changes over that period. It concluded (inter alia) that there had been a 'growing concentration of retailing and investment along the prime pitch at the expense of secondary shopping areas'. Also (in relation to 'health checks'), 'trends in secondary streets should not be overlooked as an important component of the centre as a whole'.
17. The report also concluded, 'There is a need to exploit the potential of secondary shopping streets for alternative uses. Demand for shop units is now being squeezed between a shrinking supply of prime units both in and out of town centres. This is driving prime property prices up at a time when retailers cannot pass rising costs on to the consumer. A number of important questions need to be addressed. What is the long-term future of secondary shopping areas? Are rises and falls in their popularity a part of the natural

evolution of town centres and should it be allowed to continue? Do we need to encourage specialist independents, financial services, charity shops, leisure uses, housing etc. in secondary areas to provide alternative use for unsuitable retail property? Local authorities need to be alert to these problems and flexible policies are needed to identify and accommodate change'.

18. The BCSC report was one of the first to consider trends in secondary shopping (as well as in prime) as a result of economic trends and competition from new retail developments. Whilst it posed a number of important questions, it was reticent about practical solutions. However, it does provide some pointers for future research and policy development, particularly the issue of acceptable alternative uses for declining secondary retail property.
19. Flowing on from the House of Commons Environment Committee's support for town centre management (TCM), and the government's support for it in PPG6 of June 1996, 'Town Centre Partnerships'(7) was commissioned by the ATCM and the Department of the Environment. It was an 'action research' project, designed to establish what was current best practice, and test out ideas in a range of different types of town centre. It was not an 'academic' research project, but more of an advocacy document. It was based on a large number of case studies, some in detail and others more sketchy. Because it considered mainly town centres as a whole, it did not specifically research how town centre partnerships could benefit secondary shopping areas. The report was virtually an update of 'Vital and Viable Town Centres' (being led by the same lead consultant, Urbed); but suffered from trying to present an idea in every paragraph. As a result, whilst it provided a wealth of information, it was rather unstructured, and has probably not been as influential as its sponsors hoped. It clearly lacked academic rigour.
20. Subsequently, 'Town Improvement Zones'(8) was commissioned, as an attempt to lay down a framework for long term 'sustainable' funding of TCM. This report reviewed and evaluated a number of possible models for TIZ schemes; and then made recommendations for the introduction of TIZs, and their criteria for establishment and success. One of these was there should be clearly perceived needs in the area to be defined, which a TIZ would be able to satisfy by providing additional services. This sounds rather like the secondary shopping areas of many town centres — although because of their property ownership structure, they would not fit well with the criterion that there should be a limited number of major stakeholders providing most of the financial support.
21. It was hoped that the TIZ report would lead to government support for the legislation needed to make TIZs a reality. This did not happen. The studies and reports which followed therefore concerned themselves mainly with identifying and advocating 'best practice' in town centre regeneration, management and development. The two principal studies are 'New Life for Smaller Towns — A Handbook for Action'(9) commissioned by Action for Market Towns; and 'Investing in the High Street — Good Practice Guide'(10) by the Civic Trust Regeneration Unit. The former is a set of ideas and principles drawn from the experience of the authors (Urbed again) and a large number of somewhat superficial case studies; whilst the latter describes the results of the CTRU's 'Centre Vision' programme of town centre regeneration. Neither is strictly speaking a research based document, but both are advocacy documents. Neither deals specifically with secondary shopping as an area of special need — although both deal to a significant degree with small town and district centres, many of which are secondary shopping in the terms

of the NRPF's research outline. 'Caring for our towns and cities'(11) by Boots The Chemists (which predated the above two publications) described itself as 'A definitive practical manual documenting the key issues which contribute to the vitality and viability of our towns and cities'. It too was an advocacy and guidance document rather than a research study, which did not distinguish secondary shopping in its approach to town centre management and regeneration.

22. Further important documents are 'A Guide to Good Practice'(12) in TCM by the ATCM and 'Key Performance Indicators'(13) also by the ATCM. The former sets out a number of examples of good practice covering a wide range of aspects of TCM, together with some general principles deduced from them. The latter sets out a detailed framework for 'benchmarking' and monitoring town centres on a systematic basis, so that their performance can be comprehensively measured and tracked as an essential management tool. Neither deals specifically with secondary shopping, although both include guidance which can usefully be applied in the regeneration of secondary shopping areas.
23. It is clear from our literature review that there has been very little 'academically respectable' research on town centres and retail planning over the last ten years or so, which has been widely published or has influenced practitioners. In general, the professional press has tended to be mainly 'newsy' in its treatment of topics, and (not being refereed), has given little space to genuinely academic research. Thus the planning press has focused on what is happening in the evolution and application of planning policy; and the property press has provided mainly market commentary. Whilst in addition to the most influential documents discussed above, there has been academic research, little of this has seeped out to practising professionals in planning, retail development and town centre management. In contrast, the documents discussed above were widely commented on in the professional (rather than academic) press, and are well known to practitioners.
24. Within these well known and influential documents, there has been little treatment of secondary shopping as a distinct category of location with particular problems and needs. Whilst there are well known and established tools for assessing secondary shopping (for example some of the PPG6 Figure 1 indicators, and the Key Performance Indicators proposed by the ATCM), these tools have not yet been applied to secondary shopping in any systematic way. There is therefore a substantial lack of knowledge (other than the experience of practitioners and much market comment), backed by academically sound research, of how town centre dynamics affect secondary shopping and its relationship with the more successful prime retail areas. This strongly suggests that research should focus on the relationship between prime and secondary shopping in the context of town centres as a whole; and be aimed at understanding the particular problems faced by secondary shopping areas, and defining appropriate policy responses and ameliorative actions.

ISSUES ARISING

25. In this section, we attempt to provide preliminary answers to the questions posed in the NRPF's research outline or where this cannot be done, to indicate the research which would be needed to provide those answers. It is important to remember, however, that secondary shopping is not homogenous. It differs substantially from town to town; and

even within a single town there may be more than one different type of district or local shopping centre. This suggests that research should be based on a sample of towns of different types, so that it leads to sets of principles which can be applied in different circumstances, rather than a 'one size fits all' approach.

The role of secondary shopping

26. The role of district and local centres vis-à-vis the town centre could be assessed by:

- Estimating their sales for different categories of goods, based on the data in existing household interview surveys of shopping patterns, and comparing this with the estimated sales in the town centre, derived from the same source data.
- Comparing the representation of different types of retailers and service businesses with those in the town centre. This could include comparing the floorspace for each use, numbers of units, and retailer type (ie multiple or independent).

Recent trends in those roles could be established by analysing historic data on retailer representation, for example historic Goad data, or floorspace data held by local authorities.

27. Within town centres, data (current and historic) on retailer representation, shop floor space, pedestrian flows, rents and yields, new developments, traffic management schemes, etc, could establish the relationship between the prime and secondary retail areas, and how this has changed in recent years.

Changes of use

28. In the sample towns, the analysis above will indicate what changes of use have occurred. An assessment of market demand for a range of uses would be needed, to indicate what future changes may be possible. This would need to be based on interviews with local commercial agents; and details of recent market transactions. Assessing whether possible changes are desirable is more problematic, and likely to be largely a matter of professional judgement against an evaluation framework.
29. Currently, 'planners' objectives' as expressed in Local Plans are substantially based on resisting or at least controlling change. Thus most Local Plans define prime and secondary shopping frontages; and then have policies along the lines of 'planning permission will not be granted for changes of use or developments which would result in more than x% of properties in the prime frontages and y% in the secondary shopping frontages being occupied by non A1 retail uses'. Non retail uses are thus seen as disadvantageous — mainly because they are perceived as breaking the continuity of the browsing experience for the shopper, and resulting in dead frontage or cut-off points beyond which shoppers will not go. Of course, this is a simplistic response, which ignores the fact that many non-retail uses are substantial generators of pedestrian traffic in their own right, for example café/bar units, or banks and building societies. It also usually takes little account of the functional relationship and linkages between the prime and secondary shopping areas in individual town centres.

30. Research in the sample towns could therefore focus on the extent to which such policies have actually operated in practice, and on the degree to which they have been supported by Planning Inspectors. It could also be aimed at documenting the actual Outcomes in terms of how secondary shopping streets have changed their composition over time; and the effect this has had on pedestrian flows and property prices (for example). This should enable some general principles to be deduced, for application as appropriate elsewhere. It should also enable the current simplistic Local Plan policies to be refined.

Property ownership

31. Within the sample towns, the pattern of property ownership in identified secondary shopping areas could be established by access to Land Registry records. A sample survey of the property owners could then be undertaken to establish their experiences, perceptions and intentions. In all probability, this work would indicate a highly fragmented pattern of ownership, which in itself would tend to inhibit step change unless compulsory purchase was applied. Analysis of the ownership pattern would provide pointers to the degree of change which is likely to be possible; and to the degree to which the designation of a TIZ (for example) would be a practical possibility as a new initiative for regeneration.

Vitality and viability

32. Measuring the vitality and viability of secondary shopping on its own is notoriously difficult, partly because data is more sparse than for prime shopping. Thus for example, there may not be a very active property market in secondary shopping streets, and thus little evidence of market transactions from which absolute levels and trends can be established. The factors underpinning the vitality of secondary shopping can sometimes be deduced from case studies, but are unlikely to be readily measurable. It is axiomatic that it is shops which attract shoppers. The retail health of the town centre as a whole, including that of its secondary shopping areas, therefore depends upon it having a 'critical mass' of a balanced and integrated range of accessible shopping and service facilities and other related attractions. The secondary shopping areas are an important component of this critical mass, because they are able to provide shops and service businesses which complement those in the prime retail areas. Thus the health of the secondary shopping areas within a town centre is in most cases likely to be inextricably linked with that of the prime areas in the context of the town centre as a whole:
33. Research in the sample towns should therefore be aimed at identifying obstacles to integration of the secondary areas with the prime areas and the causes of any fragmentation. It should also investigate the effects of loss of key attractions or 'anchors', or the introduction of new ones. The appropriate policy response may well then be altered traffic management, introduction of a new pedestrian generator such as a bus interchange or a car park, or enhanced on-street quick stop parking; rather than retail frontage policies in the Local Plan.

Stability and sustainability .

34. The research outlined above will go some way towards indicating what has actually been happening in the secondary shopping areas of the sample towns. However, it does not. address the health and stability of the retailers and service businesses located in those

areas. A high proportion of those businesses are likely to be independents rather than multiples. In the USA, the experience of the Main Street Programme has been that regeneration efforts in small 'downtowns' need to be focused on assisting local independent businesses to improve their attractiveness and profitability, in parallel with improving the shopping environment. This is also true in secondary shopping areas in Britain. Research therefore needs to include a sample survey of local independent businesses in the identified secondary shopping streets, to establish their needs and perceptions, and the obstacles to profitable operation which they face. This could be supplemented with in-depth interviews with a smaller sample to probe responses in more depth. The results should enable town centre partnerships to fine tune their action plans, for example by including innovations such as business mentoring or consultancy services for local independent businesses.

Data sources

35. The main data sources will be likely to include:

- Experian Goad
- The local planning authority
- Local commercial estate agents
- Pedestrian Flow data archives
- On Street inspections
- The Land Registry
- Bespoke surveys, eg of property owners, and local independent businesses
- Existing household interview surveys of shopping patterns

The main weaknesses in these sources are that the quality of the data will be variable, and its availability may be patchy. Time series data may also not be readily available except for very recent years. There will also be a lack of property related data in secondary shopping areas.

RESEARCH PRIORITIES

36. We consider that research should be based on a sample of towns, in which the above issues can be explored in as rigorous a way as possible. The sample should embrace a range of town types. The aim should be to investigate trends in and the future potential of the secondary shopping in each town; and then to deduce from that case study material more general principles which can be applied elsewhere. Investigating a range of town types may result in sets of principles, rather than a single set which is universally applicable — although some principles flowing out of the research may be of wide application.

37. In essence, the research priorities are:

- To formulate criteria for identifying secondary shopping in each town
- To design tools for measuring the characteristics and performance of secondary shopping, including trends

- To apply those tools to each case study town
- To deduce principles or sets of principles for regenerating or enhancing secondary shopping, which are of wider application
- To assess the future of secondary shopping in the case study towns and nationally, in the light of recent trends and anticipated national social, demographic, economic, technological, political and retail trends
- To formulate appropriate responses by policy makers and regeneration agencies.

38. Within this general approach, key issues will be:

- How secondary shopping areas can identify niche markets for their services, and exploit their unique 'personality', so as to develop a role which is complementary to rather than competitive with prime retailing; or in the case of district and local centres, with larger centres nearby.
- How independent retailers and service businesses in secondary shopping areas can be assisted to improve their attractiveness and prosperity; and new start-ups encouraged
- How appropriate new development can be attracted, so as to increase the critical mass of attractions commensurate with the identified roles and functions of secondary shopping areas.
- What action should be taken by the public and private sectors in partnership to secure long term prosperity of secondary shopping, and its contribution to the attractiveness of town centres as a whole.

RE COMMENDATIONS

39. We recommend that the NRPF narrows the scope of the research to focus it on secondary shopping within town centres, and exclude district and local centres. They have significantly different characteristics and suffer from somewhat different problems. The needs of such centres could well form a separate research project.
40. The fundamental aim of the research should be to identify what needs to be done to make the secondary shopping areas in town centres contribute as much as possible to the attractiveness, vitality and viability of the town centre as a whole.
41. We recommend that the research be based on a sample of case study towns covering a full range of town types.
42. The research should be as academically rigorous as possible, rather than mere recitation of anecdotal examples, 'action research' or advocacy, as has been the case with some of the previous studies referred to in our literature review.

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(APPENDIX – COMMISSIONING STATEMENT)

**National Retail Planning Forum
Secondary shopping scoping research outline
Town centre dynamics**

Objective

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 town centre dynamics on secondary shopping (the subject of this brief), while the other reviews retail capacity and need.

Terms of reference

For present purposes it would be unhelpful to be overly prescriptive in the definition of ‘secondary’ shopping. The term 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 within a town in terms of the profile of products, retailers and shoppers?
- 2 How might this role change
 - in the medium term; and
 - in the long term?
- 3 How should changes of use in secondary retail locations be managed? In particular,
 - what alternative uses are deliverable?
 - to what extent are these alternatives desirable?
 - to what extent can market forces be directed to achieve planners' objectives?
- 4 Who owns secondary shops, what attracts owners to the sector, and what is the attitude of property owners to changes of use?
- 5 Where changes of use have occurred,
 - what examples can be found of successful and unsuccessful transitions?
 - what are the ingredients of success?
- 6 To what extent is the vitality of secondary shopping underpinned by
 - the strength of the local economy;
 - the health of 'prime' shopping;
 - the scale and composition of the secondary shopping offer;
 - accessibility; and
 - other (non-retail) footfall generating uses?
- 7 What factors are most likely to undermine the vitality of secondary shopping? In particular, how do new shopping centre developments affect secondary shopping?
- 8 How stable and sustainable is the secondary retail offer? In particular, is 'negative demand' (the desire of retailers to leave their existing premises) a significant phenomenon, and can it be assessed?
- 9 What data resources are available to help understand town centre dynamics (with particular reference to secondary shopping), and what weaknesses can be identified?

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 NRPF 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.