

# **Under Served Markets**

## **A Working Introduction to Research**

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# **Under Served Markets: A Working Introduction to Research**

The USM handbook draws on the experience of practitioners and also on the emerging research base. The public policy environment set the context for early research with an emphasis on the social exclusion agenda and subsequently the health agenda. Current studies now offer much research which can usefully inform policy makers and practitioners. Importantly the research base has assisted in moving the debate from pre – and mis- conception to a more nuanced understanding. Retail-led regeneration is a complex issue and there is a diversity of types and dimensions of retail-led regeneration. Research shows that these intimately affect the outcomes of retail-led regeneration for an area, its retail structure and its residents. The USM handbook recognises this complexity and diversity and translates it into questions practitioners should ask in order to get to grips with this complexity. There are still many gaps in the research but challenges to policy are already evident.

A schema has been drawn up below and the relevant research findings highlighted. A full listing accompanies the schema. The schema draws on an understanding of the literature and the research findings. It incorporates the possibility that regeneration and food provision in under served markets can fulfil a variety of goals and be achieved in different ways.

All references listed in the schema are hyperlinked to the entry in the fuller listing of relevant references. The full list comprises the following sections:

- **General and Theoretical Studies**
- **Policy and Strategy**
- **Key Studies**
- **Additional Research Findings**

Decisions	Key Considerations	Research References	Findings
<b>Planning Framework</b>	Role of Centres in an Urban Network	<a href="#">PPS6</a> , SPP8 <a href="#">Guy</a>	
	Local ←————→ Regional	<a href="#">Cummins et al.</a>	USMs can be served by regeneration initiatives which will either supply their needs or draw them into the wider urban economy. A brand superstore would often for example be expecting to draw trade from a wider area.
<b>Priorities for area</b>	Welfare (Affordability/Budget, Diet, Shopping patterns)	<a href="#">St Rollox, Glasgow</a> <a href="#">Seacroft, Leeds</a> <a href="#">Newcastle</a> <a href="#">Hitchman et al.</a>	It would seem that diet will not be altered except for a very few particular groups. A high proportion of shoppers will be already shopping outside the area in superstores but a new store can clawback 30-40% of these. A distinction between spend and patronage should be made by store type.
	Economy (Employment, Boost to local economy, Clawback, Existing retail structure)	<a href="#">Cummins et al.</a> <a href="#">Dixon and Marston</a>	Existing retail structures should be taken into account. These may be at a low starting level and a new store will have no significant negative impact but actually boost local retail. Multiplier effects might be expected due to increased wealth through employment. Much existing fabric is unsuited to modern space

			requirements.
	Environment (Other projects to improve environment, Travel options, Perception of area)	<a href="#">Cummins et al.</a> <a href="#">Guy</a>	Perceived health can be affected
<b>Types of retail development</b>	Small scale ↔ Large scale		
	Voluntary Cooperative, Neighbourhood retailing, Discount Store, Superstore, Shopping Centre	<a href="#">Guy</a> <a href="#">Freatly and Hare</a> <a href="#">Wester Hailes</a> <a href="#">Lavin</a>	Small community based developments can meet specific local needs in terms of service provision but are unlikely to have a major regenerative impact on the local economy or employment. Larger retail developments are likely to fulfil a wider range of objectives particularly in area based terms.
<b>Organisation</b>	Single retailer ↔ Multi Retailer	<a href="#">Boarnet</a>	Multi retailer developments will involve a wider range of company policies which are harder to integrate with local objectives but not all single retailer developments will match the locality equally well.
	Partnerships, Recruitment, Training, Community Relations, Planning Gain	<a href="#">Tesco Regeneration partnership</a> <a href="#">West Quay</a> <a href="#">Mitchell and Kirkup</a>	Integrated training and recruitment can be achieved so as to ensure those in a community most in need of employment are catered for. This requires an understanding of skill levels and socio-demographic characteristics of potential or desired workforce.

# References

## General and Theoretical Studies

Boarnet, M., Crane, R., Chatman, D. and Manville, M.  
Emerging planning challenges in retail; the case of Wal-Mart,  
**Journal of the American Planning Association**, 71(4), 2005, 433-451.

The article argues for the use of economic cost-benefit analysis in the evaluation of a proposed supercenter. It is shown that supercenters such as Wal-Mart can have differing economic impacts. Because they offer lower wages than other types of retailers and because they offer cheaper food there are implications for the communities concerned and local incomes. In a better off area the effect will be to reduce income levels and local tax returns whereas in another area it might increase local incomes and make food more affordable. Such economic calculations are not normally part of land use decision making but it is pointed out in the article that these are important considerations and that outcomes will not be uniform but will vary depending on the retailer, existing store profiles and consumer income group. The example is from California but the conceptual aspects are of significance.

Caraher M., Dixon P., Lang T. and Carr-Hill R.  
Access to healthy foods: Part I. Barriers to accessing healthy foods: differentials by gender, social class, income and mode of transport.  
**Health Education Journal**, 57, 1998, 191-201.

Carley, M., Kirk, K. and McIntosh, S.  
**Retailing, sustainability and neighbourhood regeneration.**  
York: Joseph Rowntree Foundation, 2000, 79p.

The report begins from the premise that the revitalisation of local areas in deprived parts of cities is worsened by the lack of adequate retail facilities. Retailing is a regenerative force in areas of social exclusion. 14 initiatives involving refurbishing of retail parades, precincts and market halls, rebuilding shopping centres on estates and the creation of new high streets are reviewed. These provide examples of good practice and are instructive in highlighting the factors which need to be addressed from a policy perspective. In each case study key questions were investigated. Retail questions included the impact on vitality and viability, relationships between existing retailers and the new development and the retail offer. Social, environmental and managerial issues included relationship to the community, community involvement, design, travel issues and training and employment.

Cummins, S. and Macintyre, S.  
Food deserts: evidence and assumption in health policy making,  
**British Medical Journal**, 24<sup>th</sup> August, 2002, 436-438.

This paper challenges the use of the concept 'food desert' suggesting that the extensive use of the term has given it legitimacy even without adequate evidence that food deserts actually exist. Despite the lack of evidence based research about food deserts policy is already being implemented which assumes that they exist. The article

concludes not that food deserts do not exist but that the evidence that they exist and that the policies being implemented are correct simply does not exist.

Dixon, T. and Marston, A.

**The role of UK retailing in urban regeneration,**

Reading: The College of Estate Management, 2003, 142p.

A study of the impacts and effects of urban regeneration on urban vitality and viability with detailed case studies of major retail developments in town centres and an exercise to calculate multiplier effects in terms of employment and the local economy.

Donkin, A., Dowler, E., Stevenson, S. and Turner, S.

Mapping access to food at the local level,

**British Food Journal**, 101(7), 1999, 554-564.

A quantitative method is developed to measure access to food shops at the local level. Food shops were mapped, walking distances calculated and socio-economic profiling carried out in areas of deprivation in London. In this way it was possible to establish a measure of the nature of access to food shops in such areas.

Findlay, A.M. and Sparks, L.

**Food deserts,**

London: National Retail Planning Forum, 2006 (Retail Briefing Paper 2)

Key findings and themes from recent research on food deserts are summarised and a listing of references, research contacts and web sites included.

Guy, C.

**Planning for retail development,**

London: Routledge, 2007, 292p.

This book includes two relevant chapters: Chapter 8 - Social exclusion, access to shopping and retail policy and Chapter 9 - Urban regeneration and retail policy. These synthesise the thinking behind current policy and evaluate its impacts from a retail planning perspective.

Hitchman, C., Christie, J., Harrison, M. and Lang, T.

**Inconvenience food: the struggle to eat well on a low income,**

London: DEMOS, 2002, 63p. 1841800503

The results of an in-depth study of coping strategies for buying food on a low income. Shopping strategies in relation to budgetary constraints and travel solutions for obtaining shopping are discussed. Travel often posed problems but frequently it was the journey from the bus stop to the house which was most problematic. One stop solutions are attractive to these groups as only one cost is incurred in shopping. From a planning perspective a key finding is that small shop provision in deprived areas would not offer low income families the type of shopping opportunity they require.

Lang, T. and Caraher, M.  
Access to healthy foods: Part II. Food poverty and shopping deserts: what are the implications for health promotion policy and practice?  
**Health Education Journal**, 57, 1998, 202-211.

Lavin, M.  
Supermarket access and consumer well-being,  
**International Journal of Retail and Distribution Management**, 33(5), 2005, 388-398.

This study is contextualised in the UK literature as well as the US literature on the link between food accessibility and healthy eating with particular reference to the appropriateness of a large supermarket intervention in a deprived area. In considering whether this was an appropriate intervention the author concludes that the expertise of a larger company (in this case Pathmark) was more likely to be able to ensure the supply and management of the fresh food sector and procurement of healthy foods than a locally based initiative or smaller scale development.

Wrigley, N.  
'Food Deserts' in British cities: policy context and research priorities,  
**Urban Studies**, 39(11), 2002, 2029-2040.

## **Policy and Strategy**

Acheson, D.  
**Independent inquiry into inequalities in health**,  
London, TSO, 1998

Department of Trade and Industry  
**Business investment in under-served markets: an opportunity for businesses and communities**,  
London: DTI, 2002, 50p.

Office of the Deputy Prime Minister  
**Planning policy statement 6. Planning for town centres**,  
London: ODPM, 2005, 36p. (Available at [www.odpm.gov.uk](http://www.odpm.gov.uk)) 0117539392

Office of the Deputy Prime Minister  
**Tackling social exclusion: taking stock and looking to the future: emerging findings**,  
London: ODPM.

Social Exclusion Unit  
**National strategy for neighbourhood renewal: policy action team audit**,  
London: Cabinet Office, Social Exclusion Unit, 2001, 14p. Available on-line from [www.cabinet-office.gov.uk/seu/2001/pataudit/13.htm](http://www.cabinet-office.gov.uk/seu/2001/pataudit/13.htm).

Wanless, D.

**Securing good health for the whole population.**

Report for HM Treasury, 2004. Available for download from

<http://www.hm->

[treasury.gov.uk/consultations\\_and\\_legislation/wanless/consult\\_wanless04\\_final.cfm](http://www.hm-treasury.gov.uk/consultations_and_legislation/wanless/consult_wanless04_final.cfm)

## **Key Studies**

### **1. St Rollox, Glasgow**

Cummins, S., Petticrew, M., Higgins, C., Findlay, A. and Sparks, L.

Large scale food retailing as an intervention for diet and health: quasi-experimental evaluation of a natural experiment,

**Journal of Epidemiology and Community Health**, 59, 2005, 1035-1040.

Findings from the study of a food retail intervention in Springburn in Glasgow used a 'quasi-experimental' design to ensure that changes in the intervention area were not merely symptomatic of broader changes. The potential impact on diet as the result of food retail interventions had important implications. No impact on diet was uncovered but an improvement in psychological health was discovered.

Cummins, S., Petticrew, M., Sparks, L. and Findlay, A.

Large scale food retail interventions and diet,

**British Medical Journal**, 330, 2005, 683-684.

This article reports on the findings from the study of the large scale food intervention in Springburn in Glasgow. The conclusions suggested that there had been no significant impact on diet as a result of the store intervention.

Cummins, S., Findlay, A., Petticrew, M. and Sparks, L.

Healthy cities: The impact of food-retail led regeneration on food access, choice and retail structure,

**Built Environment**, 31(4), 2005, 288-301.

The paper arises from a study of diet and health related effects of a superstore in a deprived area of Glasgow, Springburn. The paper specifically presents the results of the impacts on retail structure showing that the superstore has not led to the closure of existing retail outlets, even in the fresh food sector, but has stimulated retailing in the area with lowered vacancy rates and greater retail employment in the area.

### **2. Seacroft, Leeds**

Guy, C.

Arid debates,

**Town and Country Planning**, 71(10), 2002, 246-247.

People living in deprived areas often seem to have lower levels of nutrition. Guy presents results from Seacroft in Leeds on the types of shops where these people actually purchase their main food shopping and how they perceive their shopping trips. Interestingly the majority travelled to a superstore which was outside the Seacroft area. The travel did not seem to be perceived as a particular problem. Variations in nutrition seemed to be linked to social characteristics. The article concludes that people living in 'food deserts' find superstores to shop in. It also suggests that indeed superstores are their preferred shopping environment and that PAT 13's recommendations for small scale local retail development would not have met the needs of these areas in terms of the costs of foodstuffs.

Whelan, A., Wrigley, N. , Warm, D. and Cannings, E.  
Life in a 'Food Desert',  
**Urban Studies**, 39(11), 2002, 2083-2100.

Wrigley, N. , Guy, C. and Lowe, M.  
Urban regeneration, social inclusion and large store development; the Seacroft development in context,  
**Urban Studies**, 39(11), 2002, 2101-2114.

The main focus of this article is a discussion of the planning context of large store development in deprived areas or food deserts. Then the question of whether these stores are the most appropriate solution or merely a matter of expediency is tackled.

Wrigley, N. , Warm, D. and Margetts, B.  
Deprivation, diet and food retail access: Findings from the Leeds 'Food deserts' study,  
**Environment and Planning A**, 35 (1), 2003, 151-188.

The study of Tesco in Leeds Seacroft district has suggested that this non-health intervention may have had a positive if modest impact on the health at least on the margins. This paper examines the effect of the store on the groups who switched to shopping in the new store. The majority of these were switching from limited range discounters. In aggregate terms little impact on diet was found after statistical analyses but more detailed analysis showed that there was an impact on those who had had the least healthy diets when they switched from a limited discounter to Tesco. Groups who switched from one Tesco to another showed no change.

Wrigley, N. , Warm, D., Margetts, B. and Whelan, A.  
Assessing the impact of improved retail access on diet in a 'Food Desert': A preliminary report,  
**Urban Studies**, 39(11), 2002, 2061-2082.

A presentation of results from the study of Tesco in Seacroft in Leeds. No association between diet and access to a car or transport to a store could be found. The type of retail outlet patronised by respondents was found to be important. Those patronising limited range discount stores for fruit and vegetable purchases appeared to have a less good diet. Switching away from these stores following the opening of Tesco appears to result in some improvement for those formerly with the worst diets.

### 3. Cardiff

Guy, C.

Neighbourhood retailing and food poverty: a case study in Cardiff,  
**International Journal of Retail and Distribution Management**, 32(12), 2004, 577-581.

Within the context of the food desert debate the role of neighbourhood stores contribute to food availability and in particular fresh food availability. This article looks at the role of neighbourhood retailing in providing a healthy diet in deprived areas. The fresh food offer in neighbourhood stores is often limited and in the case of symbol group stores expensive.

Guy, C., Clarke, G. and Eyre, H.

Food retail change and the growth of food deserts: a case study of Cardiff,  
**International Journal of Retail and Distribution Management**, 32(2), 2004, 72-88.

Accessibility scores are calculated for access to food retailers in Cardiff. It is shown that a divide in access scores has developed between better off and deprived areas. The conclusions were somewhat mixed. Large food store development has not only benefited the higher income areas although increased access has been greater in these areas. Many of the poorest EDs have become worse off in terms of access to high quality food retailing.

Guy, C. and David, G.

Measuring physical access to healthy foods in areas of social deprivation: a case study in Cardiff,  
**International Journal of Consumer Studies**, 28(2004), 222-234.

### 4. Newcastle

White, M., Bunting, J., Raybould, S., Adamson, A., Williams, I., Mathers, J.

**Do food deserts exist? A multi-level geographical analysis of the relationship between retail food access, socio-economic position and dietary intake,**

London: Food Standards Agency, 2001. (Available online at

[www.food.gov.uk/science/research/researchinfo/nutritionresearch/foodacceptability/n09programme/n09projectlist/n09010/n09010r](http://www.food.gov.uk/science/research/researchinfo/nutritionresearch/foodacceptability/n09programme/n09projectlist/n09010/n09010r) )

Report of the Newcastle based research project into differential access to food outlets. Relationships between access and socio-economic variables show that for most people there is access to modern food retail outlets although some people have to travel to achieve this. They were unable to establish a relationship between retail provision and diet although unhealthy eating was associated with living in a deprived area.

### 5. Castle Vale

Mitchell, A. and Kirkup, M.

Retail development and urban regeneration: a case study of Castle Vale,  
**International Journal of Retail and Distribution Management**, 31(9), 2003, 451-458.

Castle Vale is a deprived and neglected estate in Birmingham. A regeneration programme has been in place in the area since 1993. The retail development which included a major Sainsbury's store is evaluated. The contribution to employment and the associated skills training were important. The cooperation between the regeneration agency and other stakeholders is critical in delivering appropriate policies and ensuring that the potential benefits of a major retail development to regeneration can be achieved.

### **Additional Research Findings**

Clarke, I., Hallsworth, A., Jackson, P., De Kervenoael, R., Perez del Aguila, R. and Kirkup, M.

Retail competition and consumer choice: contextualising the 'food deserts' debate,  
**International Journal of Retail and Distribution Management**, 32(2), 2004, 89-99.

A key issue in the debate has become the issue of choice rather than mere provision with the further dimension of access to choices. Choices are located in specific social contexts as well as spatially specific places. It is the contrast between consumer defined choices and provision. In this respect the existence of certain stores does not necessarily mean that they are in competition with each other even if they are located in the same area, and conversely nor does it mean that an urban regeneration initiative will necessarily provide the choice suitable to a given community or subset of consumers.

Curtis, S., Cave, B., Coutts, A.

Is urban regeneration good for health? Perceptions and theories of the health impacts of urban change,  
**Environment & Planning C: Government & Policy** 20, 2002, 517-534

Freathy, P. and Hare, C.

Retailing in the voluntary sector: the role of the Scottish food co-operative,  
**European Journal of Marketing**, 38(11/12), 2004, 1562-1576.

Lowe, M.

The regional shopping centre in the inner city: a study of retail-led urban regeneration,  
**Urban Studies**, 42(3), 2005, 449-470.

Retailing should it is concluded be seen as a critical part of 'the urban' and is a prerequisite to the agenda of delivering 'successful places'.

Lowe, M.

Revitalizing inner city retail? The impact of the West Quay development on Southampton,

**International Journal of Retail and Distribution Management**, 33(9), 2005, 658-668.

Morning Noon and Night Ltd: retail provision in disadvantaged neighbourhoods, **Renewal.net Case Study**, 2003, 7p. (available from [www.renewal.net](http://www.renewal.net))

This study details the decision and outcomes of Morning Noon and Night's project to build a new store in Wester Hailes in Edinburgh. The impact of the store on this deprived area is outlined. A key part of company strategy is to be at the heart of the local community, employing local people and buying as locally as possible. The development brought to Wester Hailes a much needed retail outlet providing extra functions such as an ATM. The development is seen as a success in terms of proactive community, public and voluntary sector cooperation with the private sector.

Rex, D. and Blair, A.

Unjust deserts: food retailing and neighbourhood health in Sandwell, **International Journal of Retail and Distribution Management**, 31(9), 2003, 459-465.

Southampton West Quay development and West Quay local recruitment, **Renewal.net Case Study**, 2003, 7p., 7p. (both available from [www.renewal.net](http://www.renewal.net))

The success of the job matching scheme operated by Hammerson Properties UK is outlined. Some 3,500 jobs were created by the development. 2,500 jobs were new retail jobs and more than half of these were filled through the job matching scheme. 900 local unemployed people found jobs at West Quay. The role of the developers is underlined. A check list of key points in how this was achieved is included.

Tesco Stores Ltd

**Tesco Regeneration Partnerships Evaluation report 07:99-06:02 - the story so far.**

Cheshunt : Tesco Stores Ltd, 2002.

Tesco Stores Ltd

**Tesco Regeneration Partnerships - the story so far.**

Cheshunt : Tesco Stores Ltd, 2002.