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INTRODUCTION

The NRPF has requested a scoping paper to determine the nature of the research which needs to be undertaken to:

- establish how the retail leisure mix currently works and how this may be expected to change in the future;
- enable best practice! policy development in terms of sustaining and enhancing the economy and attractiveness of urban structure and town centres.

In considering the issues, we have taken into account the following objectives as specified in the NRPF brief:

1 To consider the following range of retail/leisure activities and their significance for the research project: catering facilities; children's fairground facilities; cinemas, theatres, ice rinks, bowling alleys, health/fitness centres, and other sports facilities including football stadia; and heritage attractions.

2 To review the field of research undertaken in relation to retail/leisure developments.

3 To consider whether retailing by itself should be considered as a leisure activity.

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4 To consider the geographic scope of activities from town centres to out-of-centre locations, including outlet malls.

5 To take into account that new larger types of activities are now subject to the sequential approach set out in PPG6 which applies to all town centre type major travel generating issues.

7 To consider the importance of the ‘evening leisure economy’ and the potential linkages/relationships to retail activities.

8 To consider the significance of small towns in the retail! leisure field as well as large city centre/out-of-centre facilities.

To achieve the objectives above we review relevant research that has taken place in four broad fields:

- consumer behaviour
- central place studies and geography
- management and design of shopping centres
- policy — town planning, retail development and town centres and thinking about these four areas makes clear the various questions which need to be asked on the topic, and the various stakeholders who have differing interests in the answers. However, before we go on to review the literature in these fields it is necessary to define the leisure market and examine its interface with retailing.

THE LEISURE **MARKET**

Defining the leisure market

FIG1: LEISURE IN

- READING
  - Books
  - Newspapers
  - Magazines
- HOME ENTERTAINMENT
  - Television
  - Video
  - Audio Equipment
    - CDs and Cassettes
    - PCs and Software
- HOUSE AND GARDEN
  - Do-it-yourself
  - Gardening
- HOBBIES AND PASTIMES
  - Photography
  - Toys and Games
  - Pets

FIG3 LEISURE

EATING AND DRINKING

Eating Out

Beer
Wine and Cider

NEIGHBOURHOOD LEISURE
Local Entertainment
Gambling
Active Sport

HOLIDAYS AND TOURISM
Sightseeing
Holidays in UK
Holiday Overseas
Foreign Tourism

The Leisure Industries Research Centre (LIRC,2000) defines the leisure market as as the sectors recorded in Figures *1* and 2.

Figures 1 and 2 here

The market is split into Leisure in the Home and Leisure Away from Home. Leisure in the Home comprises four broad sub-sectors: reading, home entertainment, house and garden, and hobbies and pastimes. Each of these sub-divides further into smaller leisure markets so that reading is split into three sub-markets: books, newspapers, and magazines. Figure 3 shows the split in consumer spending between the different sub-sectors of the Leisure in the Home market with home entertainment the largest sub-sector followed by house and garden.

Figure 3 here

sub-sectors, home entertainment, house and garden, and hobbies and pastimes, are often grouped together on retail warehouse parks, that together make up a ‘shopping for leisure’ venue. This type of venue, however, is not normally considered as relevant to the leisure and retailing discussion by retail researchers, though it would be by researchers studying the leisure market.

The fourth sub-sector, reading, is provided for in every town centre, both large and small, by newsagents and bookshops. Although we tend to think that these retailing outlets are fairly standard and conventional, and have little to contribute to the leisure and retail discussion, there have been fairly radical changes in one of these, bookshops, over recent years to make the retail experience more of a leisure activity in itself. New US style shops have posts, in-store computer system, spacious selling areas, coffee-bars and internet café. This development indicates that it may be a mistake to ignore the Leisure in the Home sector when discussing the relationship between leisure and retailing.

The Leisure Away from Home sector comprises three sub-sectors: eating and drinking, neighbourhood leisure (including local entertainment and sport), and holidays and tourism. Again each splits into several sub-markets. All the activities mentioned in Objective I above fall into this sector. Figure 4 shows that eating and drinking dominates the Leisure Away form Home sector accounting for 56% of consumer spending in this sector. The second largest sector is holidays and tourism (29% of the sector). It is interesting that most attention in the retail/leisure discussion has focussed on by far the smallest sector in consumer expenditure terms, local entertainment, which includes cinemas, theatres, health and fitness clubs, ice rinks, bowling alleys, and other urban entertainment attractions.

Figure 4 here

Figure 5 shows that the Leisure Away from Home sector dominates the leisure market accounting for 73% of the total.

Figure 5 here

Characteristics of leisure spending

Over most of the post-war period leisure spending has grown at a slightly faster rate than consumer spending in total so that leisure spending grows as a percentage of total spending. In 2000, leisure spending accounted for 29% of total consumer expenditure. Despite the long-term trend for leisure spending to increase its share of consumer expenditure, another characteristic of leisure spending over the post-war period has been its volatility. In general, leisure spending has grown more rapidly than the economy when the economy is growing strongly, but when the economy declines the fall in leisure expenditure is also greater. This is shown in Figures 6 and 7 for the eating out and sport market. This volatility in leisure spending has had a dramatic effect in the pattern of investment in leisure property in the past, where the swings of growth and decline have been even more exaggerated. During the late 1 980s, for instance, with strong growth in consumer spending, it was relatively easy to raise capital for any leisure investment. The collapse of many of these schemes in the early 1 990s, meant it was almost impossible to raise money for any investment in leisure development in the early 1990s.

However, since the mid-I 990s, this pattern has disappeared as Figures 6 and 7 illustrate. Since 1995 the British economy has started to behave out of character. Serious over-heating has been avoided and so has the need to reduce such over-heating by pushing the economy into recession. Large swings in the economy have been flattened out and we seem, at least for the moment, to be able to have steady growth, low inflation, and relatively low unemployment (by recent historical standards) at the same time. Figure 8 shows that this is particularly good news for the leisure sector. In such circumstances, leisure spending continues to grow at a faster rate than consumer spending in general so that a widening gap opens up as Figure 8 shows. Reduction in the cyclical swings in leisure spending is likely to also reduce the swings in investment in leisure development.

The leisure/retail interlace

The discussion above has shown that there is a substantial overlap between the retail and leisure sectors. Retail is all about consumer spending and any sector that accounts for 29% of consumer spending is obviously closely tied in with the retail sector. In this section, however, we will concentrate on those leisure sectors that constitute spending on leisure activities and analyse the interrelationship with the retail sector. This means concentrating on the leisure services (rather than goods) sector of the leisure market, in particular on eating and drinking out, cinema, theatres, ice rinks, bowling alleys, health and fitness clubs, and heritage attractions.

Most of the discussion about leisure and retail is concerned about adding leisure and entertainment to the retail mix and this will be the focus of this section. However, it is important to note at the outset that the opposite is increasingly common: that is, retail is often added to a leisure development. A particular example of this is the Heron City concept in continental Europe. Also major leisure attractions, such as special events or festivals, have an important impact on the retail sector. The Euro 96 football tournament brought 280,000 additional overseas visits to the UK spending an average of £77.00 per day, 40% of which went on shopping and food and drink. Thus the retail/leisure interface is broader than adding leisure to the retail mix although the rest of this section is concerned with this.

Cox (2001) presents a useful model of the retail/leisure interface in Figure 9. She categorises a spectrum of motivations for shopping/leisure behaviour with ‘purposeful shopping’ at one extreme and attending a ‘leisure event’ at the other. In between she has ‘leisurely shopping’ towards the ‘purchasing’ end of the spectrum and ‘browsing and grazing’ towards the ‘entertainment’ end. She argues that purposeful shopping is not likely to involve any leisure. Such shopping has been referred to as ‘hit-and-run’ shopping. Certain things need to be purchased and the object is to purchase them as efficiently as possible with minimum time expenditure. At the other extreme if the prime motivation is to attend a leisure event, such as going to the theatre, there is not likely to be any retail expenditure associated with that type of visit. It is in between these two extremes: ‘leisurely shopping’, with a stronger purchasing motivation, and ‘browsing and grazing’, with a stronger leisure motivation, that we see the interaction between retail and leisure.

A related approach is that of Schiller (1999) who agues that ‘mainstream retailing’ (consisting of routinely and regularly purchased goods) is increasing being put under a time squeeze, partly because of longer working hours and higher female participation rates in the labour market, and partly because holidays and other leisure activities are taking an increasing share of consumers' time and money. He introduces the concept of 'leisure shopping' which is the mirror image of mainstream retailing: 'Here the outing is not so much a means to an end as the whole point, and shopping, though important, is only part of the experience. All sorts of things may be bought but there is no list to tick off. People do not go to Covent Garden to buy a silly T-shirt, they go because of the atmosphere and end up making a purchase'. Shiller's 'leisure shopping' equates with Cox's 'browsing and grazing'. To be a leisure shopping destination, there must be an attractive environment and a good mix of eating and drinking establishments since this is the key leisure element for leisure shopping. Schiller argues that the growth of leisure shopping is good news for town centres since these are more attractive venues for leisure shopping than out-of-town centre locations, and are increasingly the location for the siting for eating and drinking establishments of all types. This suggests that the crucial element of the leisure market for retailing is the largest sub-market of leisure, eating and drinking out. The influence of the other areas of leisure, such as cinemas, theatres, ice rinks, and health and fitness clubs is likely to be secondary to the retail sector as many visitors to these leisure attractions are likely to be at the 'leisure event' end of Cox's motivational spectrum, whereas the key area for the leisure/retail interface is the 'browsing and grazing' segment.

RESEARCH REVIEW

Consumer behaviour

Relevant research on consumer behaviour relating to leisure and retail can be found on a variety of themes. In the marketing and marketing research fields, there is a very large volume of practically-oriented work on identifying and categorising purchase behaviour and on segmenting consumer groups. It is here that questions about shopping as a leisure activity are sometimes dealt with. At the simplest level, ad hoc surveys of various kinds have asked consumers whether they regard shopping as a leisure activity, if so what sorts of shopping, how much time they spend on it, and so on. Long time series data and large scale studies are lacking however, except in Henley Centre's leisure trends (1999). Work on consumer lifestyles might be expected to tell us more about interest in various leisure activities and about values and interests which may relate to use of commercial leisure facilities or the likelihood of interest in leisure shopping; in fact it seems that little is directly focused on such issues. Most of the data here Is proprietary, belonging to firms such as ACNielsen or Experian. Time series data, tracking changes, are not common.

A body of academic anthropological and sociological work on shopping has developed recently. It deals with the experience of shopping, and with the nature of consumption in terms of their significance for personal identity and social relations. (e.g. Miller 1999, Glennie 1996, Jackson et al 1995). Such work sometimes helps us understand something of the way that consumers behave, but is not directly policy or management related. An important point for us here is the way it helps to understand the real meaning of the shopping experience for individuals.

A few studies in the large field of consumer psychology relate to leisure and retailing. The most significant work for our purposes is that which attempts to identify and measure motivations for shopping. Note that most work relates either to product purchasing decisions or to store choice decisions and not to shopping that is shopping trips involving multiple choices about destinations, activities and purchases. Some interesting work has developed concepts about, and ways of measuring, consumers' non-utilitarian values — in other words the pleasure of shopping rather than the economic outcomes. (e.g. Babin et al 1994). In general, much is model building work about individual choice decisions which is interesting but of little help to us with regard to overall, economy level changes in behaviour.

Although there are frequent references to the notion in commercial and academic literature (e.g. McCarthy 1990, Cavanagh 1996, Timworth 1998, Wood 1999), just a few studies really confront, in empirical terms, the nature of shopping as leisure activity and what it means for businesses and for policy makers. Tauber (1972) discussed eleven motives for shopping:

role playing diversion learning about new trends physical activity self gratification sensory stimulation
social experience outside the home communication with others with similar interests peer group attraction
enjoying status and authority
pleasure of bargaining

A study by Buttle & Coates (1983) attempted to validate these motives, and produced some evidence of how these sociological or psychological concepts were played out in reality by shoppers. Carr identified a continuum of activities between shopping as a leisure activity and shopping as a functional activity which seems a useful model (1990) and Cox's recent work (op.cit.) is in a similar vein. A key factor is attitude to time by different consumers on different occasions, and there has been some work exploring this (e.g. Davies 1 994, Whysall 1991.)

Some useful conceptual frameworks therefore exist, and some tools for measurement. However we lack:

- good, overall quantitative data on consumer retail trip behaviour and spending, distinguishing types of leisure-retail behaviour
- time series studies, showing how attitudes and behaviour have changed, and are changing (with the possibility therefore of forecasting trends)
- studies linking the psychological with the managerial, ie exploring how consumers with different leisure shopping attitudes and values, or on different leisure shopping occasions, react to different 'offers' in town and shopping centres

Centre studies

The stream of largely geographical work on town centres ought to be useful in considering the way the retail/leisure mix works. The shopping area at the heart of a settlement is taken as something which helps define the standing of a settlement, but many other functions can be taken into account in assessing the town's overall role and function. The essence of such work is to measure the 'centrality' of a place, the functions provided there and the extent of the hinterland where it has influence, or for which it provides central services. There is assumed to be a size - function relationship, with larger centres providing more services and drawing on a larger hinterland. Centres with leisure functions as well as retailing might have a different function in their catchments and an overall wider 'draw'. There has, surprisingly, been no general study of the pattern of urban areas, or hierarchy of UK town centres, since those by Smith (1968, 1970, 1978) until Hall et al this year.

Carruthers (1957) and Thorpe (1968) dealt with the hierarchy of shopping centres. Modern 'rankings' of shopping centres, (e.g Schiller 1985, Reynolds & Schiller 1992, Management Horizons 1999) owe much to this sort of research. They however focus only on conventional retailing, and not leisure or other facilities. Discussions of the interaction of functions, and the multi-functional nature of centres are rare in recent academic work on retailing. Hall et al's recent work however re-examines the hierarchy of town centres, using indicators of urban status taking a range of functions and services into account (including theatres, cinemas, football clubs and television studios) and comparing this with a new ranking of retail status. This work shows the dramatic rise in status of southern and market towns, decline of medium sized industrial and coastal towns, and relative changes among the biggest cities up to 1998.

Further work needs to be done to investigate the leisure and retail combinations which might be related to these changes in the fortunes of different sets of urban centres.

More particularly, we need research to establish whether the introduction of new leisure facilities, and different types of leisure retailing, into centres has of itself contributed to the alteration of the hierarchy and changes in the health of centres — and if so how?

A further question is whether the growth of leisure and leisure retailing in towns is a counterweight to the growth of out of town retailing; or not? If one third of retailing is now out of town (Verdict; DETR; no official figures) how much leisure retailing and how much leisure activity overall is out of town?

Management

The third field of research we have identified relates to management. It concerns of course mainly purpose built centres/ malls. What leisure facilities could be incorporated in malls? How can they be designed? What are the effects on customer behaviour? What are the financial implications? What are the implications for management practice in terms of opening hours, car park management and so on? There is quite a lot of anecdotal comment and owners of centres of course have done their own market related research.

The late I 980s and ‘90s brought a surge in proposals for large out of town developments in the UK and saw a parallel rise in interest in incorporating idntiflable active leisure facilities in malls. Numerous articles and briefings in the trade press and from property consultancies have described and! or counted leisure uses in shopping centres - particularly purpose built, new centres. Potiriadis (1988) and McCarthy (1990) for example gave the designer’s and developer’s rationale for the new combination. OXIRM carried out some research on the trends and the reasons for it (Howard 1990.) This work also identified three models of leisure shopping centres:
- ambient leisure (explain more...
- magnet leisure in new mall
- heritage-destination leisure

Lichfleld in the same publication identified three shopper needs which centres could provide for

- relief
- distraction
- attraction

This conceptualisation provides one framework for analysing the kind of leisure which is or can be integrated with retailing, (as distinct from leisure which does not, or cannot, fill these roles.)

The concepts exist. They are seem intuitively realistic; they or ideas which are recognisably similar are used in shopping centre management and in policy discussions. However, what we lack is

- the application or testing out of the concepts to provide a different shopping centre classification or hierarchy
- ‘global’ research to identify the actual nature of the leisure offer in town centres, in purpose built centres, and in different types of centre, at present

Generalisable findings and macro-level assessments of what works and what is going on do not really exist for the UK however. Harrison (1990) identified leisure facilities within ‘major’ purpose built schemes in the UK and elsewhere, set out some of the major issues and collected what little published evidence there was at this stage. OXIRM examined the effects on customers of the combination at the Metro Centre and later at Meadowhall (Howard 1992). This work summarised the hypotheses in the management/development world as to what impact the combination might have (or was intended by developers to have!) and tested them out for just these two centres. The hypotheses were that the leisure retail combination might:

extend a catch ment area encourage visitors to stay longer encourage visitors to spend more draw extra visits attract the target customer better

In the case studies it was concluded that the leisure retail combination provided a marketable image — and that marketing or the image overall meant that the centres were very successful.

Unfortunately little research has followed up this initial work. It is the comparative work which is most needed. The hypotheses have not been tested out for different kinds of leisure and different sorts of centre. Again, we have the situation where the framework exists, but the overall empirical work has not been done. What is needed is research to establish, or collect together the data from many individual centres so that the patterns may be established:

- how do different types of leisure retailing combination perform? how do different sizes and location of centre perform on these characteristics?
- how does this ‘offer’ relate to returns on investment, retail health and to centre health.

Note that good research on these questions should use ‘controls’, ie make comparisons among the performance of centres with and without certain kinds of leisure-retail combination. Descriptions of catchments or spending etc., etc., for particular centres would not be sufficient to answer the questions.

Parallel work can be envisaged for traditional town centres.

Work is also needed to collect data on the development and financial aspects of the combination. The OXIRM work focused on markets and customers, not on cost or return on investment.

Policy studies

The fourth area is policy: town centre management, retail and leisure development planning. Some key pieces of relevant work relate to policy matters: on the 24 hour city or the evening economy (eg Jones, Hillier, and Turner, 1999); on urban design and mixed uses in centres; on the vitality and viability of town centres.

A key piece of work was URBED’s Vital and Viable Town Centres (1994). A stream of work continues on this theme, on town centre health, on the impact of town centre management and so on. On the subject of leisure URBED commented:” the most successful places, like historic towns, have created a synergy between their visitor appeal or their arts, culture and entrtainment offer, and shopping, which has enabled them to support more facilities than their population on its own could afford” (pare 2.44, quoting English Tourist Board.) The evidence quoted to support this view is anecdotal but it does seem to be widely accepted. What is clear is how this synergy may be created in centres which are less dominated by tourists. Can all centres create this attractive synergy? Urbed’s model is that a healthy town centre depends on accessibility, amenity and attractions. Attractions include arts, culture and entertainment — with ‘diversity’ and ‘critical mass’. We have a good understanding of levels and kinds of retail attraction (from work on the urban hierarchy) — and of how retail mix works. But we have no parallel research to help understand the arts, culture and entertainment mix and their levels of attraction in town centres. Nor do we have research on which activities depend on a link with a retail offer, in what ways, and which do not. Nor yet is there good analytical work regarding the way some retail activities benefit from co-location with some kinds of leisure activities in towns.

There are further questions about the relative importance of leisure and new leisure offers compared with retailing in town centres. Much retailing is now outside town centres. Some town centres are healthier than others. Can leisure help maintain customer and investor interest in the fabric and economy of town centres, while much retail interest is now elsewhere? Ravenscroft et al (2000) have recently cast doubt on this idea: suggesting that leisure businesses simply colonise areas no longer required for retailing, are not sufficient to ensure the viability of centres, and signal little more than a delay in decay.

The questions raised by their case studies need further investigation. Their methods need extending — they depend on a geographical study of land use succession. Town centre investors and managers will require a more rounded study taking into account economic outputs.

Town centre health checks have begun to be be common. Few yet have much information about changes over time. Relative, comparative studies are few and limited in scope— none really give a broad view. Little focuses on understanding the real role of leisure in town centres. The most significant comparative study (Lockwood 1999) focused on management initiatives, not leisure/retail or similar questions about the actual nature of centres. The priorities for town centre management research have not so far included retail-leisure questions.

A RESEARCH AGENDA

This research review has indicated a wide variety of research that gives some insights into the relationship between leisure and retail. However, much of this research has been done to answer different research questions than the ones raised in the introduction to this paper. The conclusion must be that the research evidence to answer some of those questions simply does not yet exist. We have indicated some of the most significant gaps.

Out of the four areas of research reviewed above, we suggest that new research in the consumer behaviour area is likely to yield the highest returns on research investment. The starting point for such research should be the spectrum of shopping/leisure behaviour concept developed by Cox (2001) as shown in Figure 9. The research should be designed to answer the following questions:

- Over an average week how many trips of each of the four types is made?
- What is the average time spent on each type of trip?
- What is the average expenditure associated with each type of trip?
- Which trip types are growing, which declining, and which are static?
- Can we identify the distribution of trip types with particular lifestyle groupings?
- Which destinations (eg town centre, out-of-town, large cities, smaller towns) are associated with which type of trip?
- What is the association with ‘purposeful shopping’ and ‘leisurely shopping’ with leisure?
- What is the association between ‘browsing and grazing’ and visiting a ‘leisure event’ and retail?

A second type of research should also considered. This would be comparative research on shopping and town centres. It should attempt to measure the amount of leisure activity in different centres, categorise it, relate it to patterns or ranks of retail activity, and above all relate it to measures of centre health. There would be considerable data problems, which we would be interested to discuss.

In conclusion: what is missing from the existing research is specific research targeted at the leisure/retail relationship. The conceptual framework for doing this research already exists. The research now needs to be carried out.

February **2001**

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(APPENDIX – C0MMISSIONING STATEMENT)
THE NATIONAL RETAIL PLANNING FORUM

BRIEF FOR SCOPING PAPER TO EXAMINE THE RELATIONSHIP BETWEEN RETAIL AND LEISURE DEVELOPMENT.

October 2000

1. Aim of the Scoping Paper

The National Retail Planning Forum (NRPF) wishes to commission a research project into the relationship between retailing and leisure developments. As a preliminary approach to this project the Forum requires a Scoping Paper in order to establish the nature and direction which that research project should take.

The combination of retail and leisure facilities in this country has grown rapidly during the 1990s following the earlier trends in the United States. It has emerged from the concept of shopping itself being regarded as a leisure activity and has resulted in a wide range of facilities in an attempt to boost footfall, loyalty and of course spending in both the retail outlets and the leisure activities.

Leisure facilities can range from catering establishments, including cafes through fairground type facilities, cinemas, theatres etc to tourist attractions.

The location of new larger types of activities is now subject to the sequential approach set out in PPG 6 which applies to all town centre type major travel generating uses.

The aim of the Scoping Paper is to determine the nature of the research which needs to be undertaken to :-

I Establish how the retail/leisure mix currently works and how this may be expected to change in the future.

2 Enable best practice/policy development in terms of sustaining and enhancing the economy and attractiveness of urban structure and town centres.

2. Background

The NRPF was established in June 1995 on the initiative of a group of leading multiple retailers. Its Briefing Note No 2 (March 1 995) stated that: -

> *"The NRPF is being promoted because there is a perceived need for a vehicle to promote a dialogue between the key players in the retail industiy, principally: retailers, property interests, local government, central government, the academic sector and consumers. The NRPF will provide an ongoing focus for debate and in formation gathering, which does not exist at present it will concern itseff with matters relating to the planning, land use and development process.*

The NRPF Research Committee is currently undertaking a research programme focused on five areas: Accessibility, Bibliography of Retail Research, Secondary Shopping, Retailing/Leisure and Retail Statistics.

3 Objectives

To consider the following range of retail/leisure activities and their significance for the research project:

- Catering facilities, of some format, are present in most types and sizes of shopping centre and include cafes, licensed premises and restaurants as well as food courts found in some of the larger centres.

- Children's fairground facilities have been included in some larger centres to provide activities for family shopping trips

- Larger facilities in the form of cinemas, theatres, ice rinks, bowling alleys, leisure and health/fitness centres are present in many existing large shopping centres but have also been incorporated in a number of new in-centre mall developments as well as out-of-centre developments including retail parks. Several new and existing football etc stadia are also being developed with other leisure and retail facilities.

- These larger facilities are designed to attract their own traffic (leisure only) as well as dual-purpose traffic (leisure and shopping together) and perhaps passing trade.

- The heritage/leisure function assumes that shops and restaurants will not only capture trade from the leisure traffic but that the heritage/leisure facilities will also appeal to shoppers.

2 To review the field of research undertaken in relation to retail/leisure developments.

3 To consider whether retailing by itself should be considered as a leisure activity.

4 To consider the geographical scope of activities from town centres to out-of-centre locations, including outlet malls.

5 To take into account that the location of new larger types of activities is now subject to the sequential approach set out in Planning Policy Guidance Note 6 and applies to all town centre type major travel generating uses.

6 To consider the impact which the various forms of leisure development may have upon existing town centres and whether there is potential for leisure activities to undertake a role of "anchor activity" in shopping centres where traditional anchor retail stores are in decline.

7 To consider the importance of the “evening leisure economy” and the potential linkages/relationships to retail activities.

8 To consider the significance of small towns in the retail/leisure field as well as large city centre/out-of-centre facilities.

4 Presentation

The Scoping Paper will be presented to the Board of the NRPF by the Chair of the Research Committee.

5 Operation

1 Timescale : The Scoping Paper should be available for presentation to the Board of NRPF in **2**

Reporting : The project is being managed by a working party of NRPF (chair Mike Brown).

6 Communication

This should generally be through the Secretary of the NRPF. The chair of the working party can be contacted on technical matters:

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