

Housing, Regeneration and Planning



The Scottish
Government

Literature Review: Policies
Adopted to Support A Healthy
Retail Sector and Retail Led
Regeneration and the Impact of
Retail on the Regeneration of Town
Centres and Local High Streets



**LITERATURE REVIEW: POLICIES ADOPTED TO
SUPPORT A HEALTHY RETAIL SECTOR AND
RETAIL LED REGENERATION AND THE IMPACT OF
RETAIL ON THE REGENERATION OF TOWN
CENTRES AND LOCAL HIGH STREETS**

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1 EXECUTIVE SUMMARY

1.1 Communities Analytical Services, on behalf of the Regeneration Division of the Scottish Government, commissioned the Institute for Retail Studies at the University of Stirling to provide a literature review of the policies adopted to support a healthy retail sector and retail led regeneration and the impact of retail on the regeneration of town centres and local high streets. This literature review (which was to focus on literature relating to the UK) was requested to meet three objectives:

- Identify what a healthy/vibrant town centre/local high street looks like;
- Identify, in the UK, what policies/approaches have been implemented to: (a) Support a healthy retail sector in local high streets and town centres, and (b) Undertake retail led regeneration;
- Explore what impact retail has had on the regeneration (in its widest sense – social, economic and physical) of town centres and local high streets, and how this has impacted on the wider community.

1.2 The review of the literature began from two key bases. The National Retail Planning Forum Knowledge Base (www.nrpf.org/biblio.htm) includes some 2000 entries on retail planning and related topics including urban regeneration. The Institute for Retail Studies resource centre at the University of Stirling has an extensive collection of material. Electronic access to various other sources, including local authority materials available in the public domain was also utilised. The National Retail Planning Forum Briefing Paper *Retail-led Urban Regeneration* provided the framework for this review.

1.3 There is a literature base on the broad subject area of town centres, regeneration and retail-led regeneration. This literature has a number of characteristics which affect the focus and content of this review. In particular, many of the changes to high streets and town centres can be small-scale and incremental, and even if presented under a redevelopment, renewal or regeneration umbrella, tend not to be researched in terms of approaches and impacts. Such studies as there are, tend to focus on large-scale schemes and out-of-town developments and are often carried out in isolation and at one point in time. Comparative, systematic and longitudinal research on policies and approaches, changes and impacts, as well as management structures and partnerships, is lacking.

1.4 **Identify what a Healthy/vibrant Town Centre/local High Street looks like:** Vibrant and healthy town centres and high streets take many forms and come in many shapes and sizes. Town centres are generally higher-density, mixed-use, accessible centres with a sense of local place and community. Key dimensions of a healthy town centre include being places with identity and legibility, places which are well connected, convivial and where retailing is conspicuous, compatibility of functions

within the place, being competitive and having a coordinated strategy. Within that the key dimensions of a healthy retail sector include good retail mix, choice, diversity, anchor stores and preferred shopper formats and fascias, low vacancy rates, low turnover, good physical fabric, competitiveness and capacity for change.

1.5 Policies and Approaches to Support a Healthy Retail Sector in Local High Streets and Town Centres, and to Undertake Retail Led Regeneration:

The variability in town centres and high streets and in their contexts and situations means that policies and approaches to town centres and high streets come in a variety of forms. These range from the formal strategic planning, through management approaches and partnerships such as town centre management and BIDS, to a myriad of local smaller initiatives and schemes. Town centres are at the heart of policy, but an understanding of the impact of the approaches and policies is difficult as the base line understanding of the situation of town centres and high streets is somewhat underdeveloped. This means that it is difficult to compare the trajectory of high streets and town centres over time and on a comparable basis. There is currently a lack of systematic research on the approaches and policy adopted towards town centres, their management and regeneration. In terms of retail-led regeneration, there can be disputes over what may be seen as conflicting policy. Many regeneration proposals have to “work” around the local situation to identify what will be allowed. Partnerships at various levels appear to be fundamental to achieving outcomes, but in the literature there is not much detailed assessment of policy effectiveness or partnership working, and the material appears partial, piecemeal and subjective.

1.6 The Impact of Retail on the Regeneration of Town Centres and Local High Streets, and the Impact on the Wider Community:

Large-scale and out-of-town retail-led regeneration appear best placed to deliver targeted outcomes, though it is recognised that the literature is slanted towards such schemes. Employment outcomes are the most obvious example. Wider regeneration outcomes are limited with image of an area and its integration into the wider urban area most significant. These can create consumer and investor confidence in much the same way as town centre retail development. This is harder to measure, particularly in the short term. In terms of impact it would seem that retail-led regeneration can offer major benefits, but these do vary. However we do not have enough “before and after” studies to be sure of impacts in different circumstances and over time, and particularly in terms of town centres. All retail-led regeneration will not deliver the same outcomes or produce the same impacts (whether positive or negative). Research has produced ambiguous findings on retail-led urban regeneration; this mix of outcomes may derive from an inadequate understanding of the process of regeneration in very different areas. Much of the research has focused on food-led regeneration, with less consideration of other types of schemes.

2 INTRODUCTION AND APPROACH

'Regeneration means broadly the physical (re) development or renewal of land already used for urban purposes: such land is usually termed brownfield. There is a strong connotation of reviving the local economy and providing new jobs, through the development itself, through linkages with existing firms, and through stimulating further (re)development.' (Guy 2006, p.214).

- 2.1 Communities Analytical Services, on behalf of the Regeneration Division of the Scottish Government, commissioned the Institute for Retail Studies at the University of Stirling to provide a literature review of the policies adopted to support a healthy retail sector and retail led regeneration and the impact of retail on the regeneration of town centres and local high streets. This literature review (which was limited to the UK) was requested to meet three objectives:
- Identify what a healthy/vibrant town centre/local high street looks like;
 - Identify, in the UK, what policies/approaches have been implemented to: (a) Support a healthy retail sector in local high streets and town centres, and (b) Undertake retail led regeneration;
 - Explore what impact retail has had on the regeneration (in its widest sense – social, economic and physical) of town centres and local high streets, and how this has impacted on the wider community.
- 2.2 The work has been structured in two parts. First, a literature review was undertaken. This used the sources accessible through the University of Stirling and which formed the basis of previous work on related subjects by the authors for the National Retail Planning Forum and Business in the Community. The review covered both academic literature (books, journals, reports) and practitioner material (planning reports, trade press, and relevant associations). The literature review was as comprehensive as possible given the two-week timescale. Secondly, this literature was assembled against the objectives outlined above. Commentary and conclusions were then drawn.
- 2.3 Town centres and high streets in Scotland (and the UK) have been the focus of concern for some time (e.g. Distributive Trades EDC 1988, URBED 1994, Sparks 1998, New Economics Foundation 2004, Carmona et al 2004). Land-use planning policy is focused on a “town centres first” principle and there has been encouragement for improving the vitality and vibrancy of town centres for many years. A number of approaches have been adopted. Nonetheless town centres remain a concern. Likewise, “high streets” are seen as the natural focus of retailing and a core of town centres, but consumers and retailers have shown a desire to use out-of-town and other off “high street” facilities (including the internet), leading to periodic concerns about the “health of the high street” (e.g. All Party Parliamentary Small Shops Group 2006). One reaction to these concerns has been a focus on regeneration of

land, centres, areas, districts and streets, with retailing being seen as an important regeneration component or indeed the lead sector (BITC 2007).

- 2.4 The term regeneration and the involvement of retailing in the regeneration process can be clouded by terminology. Because regeneration has a high profile, retail development of many shapes and sizes has tried to play a “regeneration card”. As such the term regeneration has perhaps been over-extended and over-used. There are a number of delivery mechanisms for improvements in high streets and town centres, including but not limited to town centre management and improvement programmes, townscape and streetscape enhancements and recently, Business Improvement Districts (BIDs). As can be appreciated the scale of such schemes and regeneration attempts varies enormously (Table 2.1). Partly as a consequence it might be expected that the literature base is similarly variable.
- 2.5 This literature review incorporates three types of retail involvement in regeneration (Table 2.1). Its focus on retail-led regeneration seeks to investigate the evidence on the specific contribution of retailing and what retail-led regeneration offers that other involvements of retailing does not. The focus is on town centre regeneration, though other locations are also considered. Previous literature reviews on retail-led urban regeneration and underserved markets (Findlay and Sparks 2007, 2008a) have drawn a number of conclusions. Retail-led regeneration is believed to have the potential to engage retailers in regeneration. Retail investment can be used as a way of changing, making and improving places. There would appear however to be no single retail regeneration model. Whilst studies do not yet offer adequate explanations of necessary and sufficient conditions to maximise results, they do serve to pinpoint the questions to be asked and the potential which might be achieved. Retail-led regeneration has been primarily an urban based phenomenon and it is unclear how the concepts transfer to other types of locations with very different characteristics. Retail development may have much to offer in smaller towns and market towns even if not formally termed retail-led regeneration, although the evidence base for this is sparse.

Table 2.1 Retailing and Regeneration

Retail-led Regeneration	Retailing is the lead in the regeneration partnership
Retail Component	Retailing is a key and important component of the regeneration plan
Retail Development	The development is not part of a regeneration agenda but it has a regenerative effect

3 WHAT DOES A HEALTHY/VIBRANT TOWN CENTRE OR LOCAL HIGH STREET LOOK LIKE?

3.1 Town centres come in many shape and sizes. The term town centre itself tends to be used to encompass everything from city centre to local or district centre. At all levels however there is concern over the “health” of the town centre. There are various definitional approaches to town centres, but perhaps it is more appropriate to focus on the components that are generally agreed to make up a town centre, noting however that the strength or even the presence/absence of such components will vary by situation, scale and level. Town centres generally include (e.g. SPP8 - Scottish Government 2006, PPS6 - ODPM 2005, ATCM 2006):

- Leisure, retail, entertainment and cultural facilities;
- Business, office and other employment opportunities;
- Public and private services;
- Residential opportunities;
- High density, mixed-use and sustainable developments;
- Quality, design, sense of place and focus on public realm;
- A place for the local (and other) community.

3.2 Defining town centres in these terms helps emphasise the differing scale of centres and the varying degrees of activity, diversity and sustainability of each location. Identifying what makes a healthy town centre is thus dependent on the history, scale, strategy and situation of each centre itself (as most centres operate in some form of network and/or perceived hierarchy). A healthy, vibrant town centre is thus dependent on the context, as well as the operation, of the various constituent components of the town centre.

3.3 There is no doubt however that healthy and vibrant town centres are important for the nation and its constituent communities. “Town centre first” has become the key mantra of land-use planning. The town centre is recognised as having a number of advantages, not least its multi-use complexion and focus for public sector transport (and other access). However the state of town centres has been a cause for concern. A number of management approaches have been introduced to improve their operation (e.g. Town Centre Management and more latterly Business Improvement Districts). Retailing is an integral part of town centres and high streets, though it is not a sufficient activity alone in most cases. The potential of retailing in regeneration has been recognised, not only in town centres, though there has been particular debate over the role of retailing in regeneration of town centres and high streets. This debate has stalled over a number of issues including over-simplification of causes and effects. This has in part diverted attention from a more holistic view of the town centre.

- 3.4 The identification of the components of a healthy town centre might seem straightforward. It is however not so. It is not helped by the fact that there has been little monitoring in, and amongst, towns and cities which would permit a distinction to be made between macro (i.e. national level changes such as a recession or the closure of a major high street chain) and micro (i.e. local population, access, competition etc) changes. Some planning and monitoring is highly impressive, but this does appear to be the exception rather than the rule (e.g. Aberdeen City Centre Urban Realm Strategy) and comparisons across centres and over time are limited. This is despite many calls for regular monitoring (e.g. URBED 1994, Evans 1997, Hargest and Wallace et al 2007). The discussion below is informed particularly by the broad literature on the topic, including on policy ambitions (Sparks 1998, DETR 2000, Conservative Parliamentary Enterprise Group 2008) and practice guides (e.g. Scottish Government 1999, URBED 1997, 2005, Department for Social Development 2007, ODPM 2007). It also draws on academic research on regeneration (Evans 1997, Carley et al 2000) and retail change (Dawson 2000, DTI 2004, Guy 2006). Several topics have been considered through National Retail Planning Forum studies including for example access to town centres and secondary shopping (Davies 2002, National Retail Planning Forum 2004). Hargest and Wallace et al (2007) have outlined the key performance indicators for towns based on established vitality and viability indicators. From the wider literature on changing consumer society, research by Fyfe (1999) and Miller et al. (1998) provided insights into how meanings attached to shopping and places of shopping change.
- 3.5 The UK Government White Paper Planning for a Sustainable Future (HM Government 2007) set the agenda of making successful places as a key planning goal. This holistic approach offers an understanding of what a successful place (town centre) might look like. Five areas seem important:
- Places
 - Getting to places
 - In the place
 - People and places
 - Making places
- 3.6 Retailing plays a significant role within town centres and the vitality of the town centre is linked to the health of the high street. Because of the overall focus of this literature review, the five areas above are considered in Table 3.1 in the context of retailing in town centres. The issues identified however are equally important for other town centre components and the table should be read in that light.

Table 3.1 Retailing in a Successful Town Centre or High Street

Places	
Identity of the place	Does the retail offer match this identity?
Attractive spaces within the centre	Do retail spaces contribute to and enhance the attractiveness of spaces within the centre architecturally and in terms of urban design? Does the retail space engage with consumer in a way which will capture attention?
Movement within a centre should be easy	Do different retail spaces connect with each other in a logical and straightforward way? Is the retail centre permeable?
A place that is legible	Is retailing where you would expect to find it? Are different types of retailing made visible?
How can the centre accommodate change?	Is there scope to accommodate new retail formats in an integrated way?
A place with diversity and choice	Does retailing offer an appropriate level of diversity and choice?
Getting to Places	
A place that is well connected	How accessible is retailing to different groups from different areas by different modes of transport?
Access is convenient	Within the town centre is retailing convenient to range of transport? Is parking available near to the shops? Is transport and parking used to encourage trade in a way that is helpful to retailers?
Access is comfortable	Are there 'shatter zones' which people have to cross between transport links and retail areas? Are there missing links between transport nodes and retail areas? Is there enough parking space? Does public transport match well with different town centre uses by time of day?
Access is convivial	How well matched is access to the way that people will use the retail functions of the area in terms of expected dwell time for different retail trips? Does access maximise the time people will spend in the town centre? Are parking charges and transport costs appropriate to spend levels?
Access is conspicuous	Is the retail potential obvious before customers have to commit to the town centre?
Access and change	Will accommodating new retail developments change existing access in a positive way for all retail areas?
In the Place	
A variety of town centre uses	How does retail match with the rest of the town centre uses?
Night time economy	Does the retail mix fit with the entertainment functions of the town?
Office economy	Are retail enterprises well located to service workers in the town centre?
Tourism	In thinking about town users are suitable facilities provided for tourists?
Centre that is competitive	Is there enough flexibility to ensure everyday

	needs are also catered for in accessible way? How much outshopping occurs and what is the potential for retail clawback and place switching?
Centre that accommodates change	Can land assembly be used to insure that change is well integrated?
People and Places	
Target population	Who are the potential users either resident or commuting?
Market	Who are the potential users either resident or commuting? Does retail provision match customer base in terms of potential spend? How do different retail spaces match different population groups?
Conviviality	Does the retail offer meet the service expectations of consumers? Are linked trips catered for?
Making Places Work	
Planning for town centres	Is retail planning in tune with wider planned change? Is residential expansion aligned with retail expansion in terms of choice and diversity? How is retail change engaged with the changing network of centres? How is change perceived?
Business rates	Are these well matched with buying power of users and types of retailer?
Partnerships	How do partnerships engage existing and future retailers?
Town Centre Management	Could town centre management be better used to manage change and regeneration?
A joined up strategy	Are decisions on transport and retailing coordinated?
BIDs	Would a BID be appropriate?
Traders associations	Does the traders associations have any place in the decisions which are being taken regarding retailing in a town centre?
Local community partnerships	What are consumer concerns about retailing and how can these be taken on board?
Local enterprise	Does the retail profile attract new investment?

3.7 Town centres are affected by the nature of places and how places are positioned in the network of centres. The significance of various sectors and their interactions will affect the character of a place. These also affect the potential for regeneration to alter (the perception of) places. Access to a place is key to the environment. The diversity and range of uses and activities which take place in a town centre give it character. The population attracted to the town centre provides the market opportunity for retailing and other uses. The activities which come together to organise and manage places provide a sense of energy, direction and professionalism.

- 3.8 Across Scotland there appear to be many healthy and vibrant town centres, with somewhat differing characteristics. Equally there are many others with difficulties and problems. Any approach can not be prescriptive. The interactions amongst different activities and the very real challenge of ensuring that these activities build together and are coordinated and well matched are fundamental. Table 3.1 lists some of the issues which need to be resolved to achieve a well-functioning town centre. The balance amongst these factors will vary from place to place. The accommodation and management of change in the town centre will be crucial in ensuring that change in one area or component does not compromise the functioning of another. Issues over access, design, image or management can prejudice the vibrancy of the whole or a part of a town centre. In a place-competitive environment customers often choose amongst places. Their choices will be based on both macro (e.g. access) and micro (e.g. a particular shop) aspects of the town centre environment. This goes beyond janitorial activities of streetscapes to the way centres are managed, their conviviality, identities and wider vibrancy. A good town centre is a focus for the community on many levels and activities (and not solely retailing), providing a sense of place.
- 3.9 Town centres vary in their activities and scale. The scale of the problems and opportunities are also variable. The strength of a town centre comes from a holistic perception. Thus the problems to be tackled may vary enormously in scale. A good town centre is more than the sum of its parts and needs to be designed, maintained and repaired with this overall viewpoint in mind. The local context and the network of centres will also play a role in this. In some cases this involves a radical solution of large scale development but in other situations it is a minor local issue that needs resolving. Such issues may involve collaboration for improvement as much as physical improvement itself.
- 3.10 The health and vibrancy of the retail sector contributes significantly to the town centre's image and economic well being. Measuring retail vibrancy and vitality has been the subject of a major report to the Scottish Government (Hargest and Wallace et al 2007). The details of this need not be repeated here. Table 3.2 highlights key aspects of the retail profile and raises issues which underpin the success of the retail sector in a town or centre. These are posed as questions, as different centres have different histories and different potential. Failure to address these questions can prejudice successful retailing. For example the lack of a major foodstore in a market town or deprived area can lead to outshopping. Poor urban fabric can lead to retail blight. The lack of new retail space can inhibit the development of the right sizes of stores to meet modern needs. The lack of suitable space for local and independent retailers hinders diversity and "difference". Awareness of drivers of retail change in assessing likely patterns of change is important. There is a substantial literature on this topic (e.g. Dawson 2000). Key drivers of change include innovation, sector concentration, productivity and changes in the supply chain (DTI 2004). These drive

different retail property and location priorities and thus high street and town centre success.

Table 3.2 Key Factors for Retailing in Town Centres

Retail mix	Is the centre convenience or comparison based?
Choice	What level of multiple representation is there?
Diversity	Are independent businesses profitable or subsistence? What is the target market of independent businesses?
Anchor stores	Which stores are performing an anchor role?
Vacancy rates	Are there persistent vacancies leading to retail blight?
Turnover	What are levels of retail turnover?
Physical fabric	Is the physical fabric in good condition? Have the units the capacity to be modernised or meet modern requirements (eg units of 200sq m minimum for multiple retailers)?
Competitiveness	How competitive is the centre?
Customer loyalty	Are customers loyal to the centre?
Capacity for change	Is retail blight recognised and change planned? What attention do problems receive? Are there goods missing from the profile which would enhance attractiveness? Is there sufficient retail confidence to attract new business? What churn is occurring and what does it represent in terms of retail change? Are properties owned or leased and how will this affect a centre's potential? How easy is it to pursue new business models?

3.11 A vibrant town centre will be one where there is an environment which seeks to maximise the impact of its components by ensuring that ongoing activities are compatible, access issues are resolved, there is a match amongst different town centre activities, design issues ensure legibility and where coordinated management and planning occurs in an effective way. Change must be planned for and managed so as to sustain consumer and business confidence. Awareness of business drivers and consumer preferences must be maintained and engaged through the planning process and in understanding the significance of change on the vibrancy of the centre. Above all a vibrant town centre should be a place for the local (and other) community in which they take pride and seek involvement for multiple activities.

4 POLICIES AND APPROACHES TO SUPPORT A HEALTHY RETAIL SECTOR IN LOCAL HIGH STREETS AND TOWN CENTRES, AND TO UNDERTAKE RETAIL LED REGENERATION

- 4.1 The history, context and relative health of high streets and town centres demands responses proportionate to the scale of the issues and problems. These vary from small scale initiatives such as individual shop improvements through to major urban centre regeneration. Town centres and high streets traditionally have been at the heart of the land-use planning system and form the cornerstone of the local strategy. However achieving a healthy high street and town centre has also been addressed by a number of other policy initiatives. These have varied from the introduction of town centre management and BIDS, but also include various other smaller scale initiatives and partnerships at a local level (e.g. shop front improvements). The degree of engagement at the local level also varies significantly. The literature on such policies is rather scarce when compared to the literature on planning policy and large scale, often out of town retail development. In particular the literature on the numerous small scale local schemes and minor improvements (which are increasingly presented by public bodies as “regeneration”) is almost non-existent. Whilst there is literature noting policies expressing support for the local shop and the high street, there is little detailed research on the impacts of these policies and on identifying systematically cause and effect of policies and approaches. Our literature review has been obviously skewed by this coverage.

Support for Town Centres and Retailing

- 4.2 The general planning policy framework for Scotland is known and is not the detailed focus of study here. There have been reviews of the functioning of the planning system both generally and specifically in terms of retailing policy (CB Hillier Parker et al 2004). The policy is focused on “town centres first” and encourages local authorities to assess, evaluate, plan and manage their town centres and high streets. Some Scottish authorities are seen in the literature to have taken on this responsibility e.g. Scottish Borders Council 2006, Aberdeenshire (e.g. Blaxter 2007, Hargest 2007, Wheeler 2007, Wilson 2007). Structure and local plans fit within this over-arching framework and follow this national policy and encouragement. More ad-hoc development and regeneration initiatives sit under, and sometimes outwith, these broad plans e.g. BIDS. It is recognised that out-of-town retailing exists, and has a place, and an impact on town centres, but that debate is not the focus here.
- 4.3 At a local level supporting a healthy retail sector involves clear forward planning, as achieved through the strategic plan, and business support. Strategic plan-making is required to think clearly about the network of centres and the role of retailing in town centres and local economies. It is required to make decisions about what retail space should be made

available at which centres in the network. Within town centres and edge of centres plan-making is charged with identifying whether there are adequate suitable sites for anticipated levels of retail expansion and new format development. Impact of out-of-town developments on high streets and town centres is considered. Hargest and Wallace et al (2007) were critical of the methods used for establishing what retail provision might be planned for. They made various recommendations regarding schemes such as RECAP which take into account actual shopping patterns rather than assumed shopping patterns and actual trading performance rather than the use of national metrics. There is also a need to think about the space that modern retailing requires to function both in quantitative and qualitative terms and the amalgamation of spaces providing the quality of the town centre or high street as a whole.

- 4.4 Retail planning has delivered an increasing level of retail space within town centres (CB Hillier Parker et al 2004), though there remains a strong out-of-town element. Land assembly is increasingly important in ensuring site suitability for preferred retailer formats in town centres. Compulsory Purchase Order powers have been increased and are being used more than previously. Redefinition of town centre boundaries can also be an important part of strategic retail planning, as if a town centre is constricted it may be difficult to fit new larger spaces into the centre (Guy 2007). This recognises the role for edge-of-centre development in assisting town centre activity.
- 4.5 Town centre retail development does not come under the same scrutiny as applications for non-preferred locations. Permission is generally more easily achieved, as the development is appropriately located and in line with policy. Depending on the scale of the development, and much retail development in town centres is incremental, this in turn means that the potential effects may be less than wide ranging. However retail development in a town centre can cumulatively achieve similar image transformation to that of an off-centre retail-led regeneration scheme by the renewal of the vibrancy of a town centre. Galashiels would be an example (Findlay and Sparks 2008b) where the impacts of development are felt widely.
- 4.6 Town centre retail development may not have only a positive effect on existing retailing or the configuration of a town's retailing area. Depending on the scheme itself, some may have negative effects and others may do little to make a town centre more vibrant (e.g Bromley and Thomas 2002 discuss Llanelli). Retail planning with the emphasis on town centres focuses on specific types of location, and for a long while policy has been to stop out-of-town development and encourage town centre activities. Encouragement however has often taken the form of words or very piecemeal initiatives. Planning agendas are now moving towards place based thinking with an emphasis on how a development will deliver a more successful place. This view of the place as important has lead to the branding of towns and the encouragement of particular types of retail operations e.g. as in Castle Douglas as a

Food Town. Work on branding and marketing of town centres (e.g. Warnaby et al 2005) suggests that more attention should be given to the role of retailing in the place marketing mix. There is however no comprehensive review of such approaches. Some commentators have seen the town centre emphasis as leading to the neglect of other retailing locations (Papas 2007) whilst secondary retailing has undoubtedly not always been accorded importance (National Retail Planning Forum 2004).

- 4.7 Other regulatory processes include use classes. A change of use class requires planning permission. Most changes in shop ownership would not require this. Consequently much change takes place without direction. Such changes take place at the level of individual units but cumulatively they can potentially change the nature of the town centre and impact on the perception of its retail vibrancy either positively or negatively. Use classes have been used to restrict change of use on retail warehouse parks to prevent them becoming out of town high streets. Where such restrictions do not exist retail warehouse parks may divert trade from town centres (Guy 2003, Thomas et al 2006).
- 4.8 Management of the town centre through business support comes in a number of different forms. Town centre management has been implemented in some places, though approaches and impacts appear to vary. It has a role to play in seeing the town centre as a functioning whole. BIDS are currently developing within Scotland and show an appetite for private involvement in managing business areas. The literature on Town Centre Management is mainly concentrated on toolkits and best practice material, with the Association of Town Centre Management acting as a forum for sharing experience (e.g. ATCM 1998, 2000a, 2000b). It does not seem that there has been a systematic, longitudinal review of the impact of town centre management. Those commenting on the subject have concluded that management of a town centre is a necessary but not sufficient condition to generate a healthy town centre (Hogg et al 2000, 2007, Peel 2003). BIDS differ from town centre management crucially in the involvement of local businesses. Because they are so recent, evaluation of their impact has not yet been developed. As BIDS areas are often non-standard, they will be difficult to evaluate from secondary data sources. In the literature for England and Wales (Hogg et al 2003, Jones et al 2003), concern has been expressed over the level of user involvement in the process (Guy 2006). Many of the BIDS mentioned on the BIDS websites (<http://www.ukbids.org/>, <http://www.bids-scotland.com/>) tend to cite positive impacts and factors, but in the UK, and particularly Scotland, the evidence is not yet available for full evaluation.
- 4.9 Whatever the approach, the role of partnerships is vital (ODPM 2005, PriceWaterhouseCoopers 2008). They appear to be fundamental to town centre management and BIDS, and working together is a theme in most development literature. The Conservative Party Enterprise Group (2008) have suggested another management concept 'Community Hub

Enterprise Areas' as a more community and retail-focused approach, but again it requires partnership and collaborative working. Some local authorities have taken specific initiatives such as the themed towns initiative (Wilson 2007). In all cases there is a need for discussion, collaboration and partnership, but the literature on what works and how in this subject area is rather limited.

Regeneration and Retailing in Town Centres

- 4.10 Regeneration as a term gets used in a variety of ways, and these have changed over time. A plethora of initiatives have been used to achieve regeneration agendas. These often exist in isolation. Joining them up is not straightforward and sometimes controversial, despite the broad policy statements on regeneration. For a long time retailing was not recognised as being part of the regeneration agenda, though this has changed. Within this changing and complex environment the way that the retail component relates to regeneration has also evolved. No one retail-led regeneration model exists in planning terms. Provision of retail facilities is not usually the main motive for retail regeneration but has arisen through pro-active retailer initiatives. Similarly retail development does not usually prioritise regeneration agendas, but can provide regeneration benefits. SPP8 noted that regeneration is encouraged in order to create town centres that are attractive to investors. It acknowledges however that not all activities may be suited to the town centre and makes provision for remedying access to shopping. However some projects have struggled to be acceptable as regeneration projects and many projects in town centres may aid regeneration, but tend not to be thought of in those terms, or to be subject to assessment in this way.
- 4.11 The term regeneration can now mean many (different) things to many (different) people. Regeneration is now used to encompass many activities from the effective rebuilding of an urban centre, through the visual improvement of a streetscape, to the redevelopment or refurbishment of a single small shop or shop front. Attempting (or expecting) to write policy to encompass all these dimensions would seem to be fruitless. Some of these "regeneration" schemes would of course not be subject to individual evaluation of impact. Moreover however, the ability to assess and compare impact across town centres is frustrated by this variation in scale and type of project. Some policy, impact analysis and activities are easier than others and thus tend to be focused on in the literature e.g. large scale and superstore type development.
- 4.12 The regeneration agenda emerged in planning policy terms in PPS1 in England and SPP1 in Scotland. Other parallel policies such as the National Strategy for Neighbourhood Renewal and the establishment of regeneration companies were also drivers of regeneration agendas. However both PPS6 and SPP8 have policies which may inhibit retail-led regeneration. This has proved frustrating for a number of regeneration companies. These companies often had a regeneration agenda and a plan for the development of a particular site. Key to the proposal was a

major retail development. This is often the case as retail firms (typically superstore operators) have been looking for development sites and have capital financing. However such developments can run counter to the specification of the sequential test and proposals can be refused despite the claimed regeneration benefits. Some proposals have faced a long process of appeal and inquiry before gaining permission (Smith 2005, BITC 2007). The very close scrutiny of these proposals has meant that they have to justify their regeneration case. Some retailers such as Tesco have gained credibility through their programme of targeted regeneration goals (Tesco 2002). Other applications have been accepted through a process of negotiated change of original outline permission or because a compelling regeneration case has been made. Table 4.1 summarises the very different perspectives of retailers and local authorities. Table 4.2 summarises the literature that informs the discussion below on retail regeneration and planning policy.

Table 4.1 Retail and Local Authority Concerns

Retailer Concerns	Local Authority Concerns
Ambiguity in planning	Town centres first policy
Caution about plans which take a long time to get approved	Consistency in decision making, costs of appeals or inquiries
Make decision not on deprivation needs of an area but on options	Resolving deprivation will be a priority but retailing will be only one part of solution
Preferred business formats are critical part of the proposal	Think about network of centres
Social agendas will be secondary to the business strategy	Answer to local traders and community
Negotiate specific applications	Limited expertise on retailing
Land assembly	Do not pursue regeneration through cumulative planning applications
Answer to shareholders	Integration with other objectives

4.13 It remains unclear how far the regeneration case can be made for an application diverging from the development plan and not in line with the sequential approach. SPP8 does note that remedying a quantitative or qualitative deficiency can be a reason for divergence from the plan. However this applies only to deficiencies identified in the plan. The text does not mention regeneration and arguably regeneration requires more than remedying a deficiency which might be achieved through a much smaller intervention. Definitions of qualitative and quantitative need tend to relate to floorspace and spend but not shopper preferences or the extent to which space is fit for purpose. There is therefore some issue over what might be acceptable. Regeneration is one of four stated conditions and the text does not indicate that this will be accorded precedence over the other conditions which may or may not have been met. In particular the size needed to achieve significant regeneration gains may conflict with issues on the impact on the network of centres. The English policy does not go as far as the Scottish policy and this has frustrated some regeneration schemes (BITC 2007).

4.14 Retail-led regeneration has thus been accused of being a tactic employed by retailers to ‘get round’ planning policy and continue the retailer’s programme for new store building and market share expansion. Non-central sites are often less expensive and offer greater store dominance. The scale of development proposed has often been problematic in terms of retail policy. Retail-led regeneration requires a substantial capital investment and the store proposed may intend to recruit consumers from an area wider than that defined as deprived or in need of retail investment. Of course this in many ways is consistent with the regeneration agenda as the changing image of an area may be a regeneration objective in itself. Retailer initiatives to counter this perception have been seen in the example of Tesco Regeneration Partnerships which through the establishment of a model of regeneration sets out a project with defined and realistic regeneration goals which plays to the regeneration policy and offers planners the opportunity to make exceptions to the retail policy. There are a number of such developments operating in Scotland.

4.15 In retail planning terms regeneration is contextualised within the concept of the town centre and the network of centres, and it is accepted that networks of centres can change over time. Recognition of the potential of retail-led regeneration should inform plan makers to the possibility of incorporating the idea into their networks of centres. This is the case in Scotland, but even so improved understanding of the potential of retail-led regeneration would better inform policy and decision-making.

Table 4.2 Retail Regeneration and Planning Policy

Study	Research Question	Location	Type of Study	Findings
All Party Parliamentary Group 2007	Relationship between planning policy and regeneration	UK	Government Inquiry – transcripts of evidence	The criteria and approach to deprived areas leaves them on the sidelines of current retail policy and projects with positive regeneration impacts find planning policy and bureaucracy a barrier.
Boler, B. 2008	Planning policy and regeneration	UK	Workshop/conf erence	This presentation develops the argument that many deprived areas lie outside town centres but that town centres are the preferred locus of development in retail planning policy. Case studies of the planning debate over store development in deprived areas and the benefits which can be achieved as a result of these developments are presented.
Coe, P. 2008	Making retail-led regeneration	Co. Durham	Planning document	Planning studies from a regeneration company perspective

	work			
Dibb, G. 2008	National policy context	UK	Conference	The official view of how policy meshes together in a retail regeneration context
Guy, C. 2001	Retail-led regeneration and PPG6	UK	Commentary	It is suggested that the regeneration argument may be being used as a means of countering the sequential test. If the regeneration argument is going to be sustained significant social and employment gains need to be demonstrated.
Guy, C. and Bennison, D. 2007	Formats and planning guidance	UK	Research paper using interview data	The opposing views of planners and developers with regard to retail development are counterpoised.
Papas, C. 2007	Planning policy and deprivation	UK	Short article	States position that town centre planning emphasis leading to neglect of other areas.
Rich, T. 2008	How revisions to PPS6 affect the regeneration agenda	England	Conference	Official position on way that proposed policy changes will impact on opportunities for retail-led regeneration through greater attention to qualitative factors.
Smith, A. 2005	How a retail-led regeneration scheme gained permission	Dalton Park, Co. Durham	Research paper	An examination of the planning process which took place in the case of Dalton Park and the interpretation of different aspects of the application.
Wrigley, N. 2002	Food deserts and retail planning policy	UK	Research paper	Traces how the concept of food deserts came onto the political and research agendas as food desert captured the imagination of policy makers. Policy got ahead of evidence based research.
Wrigley, N. et al. 2002	How retail-led regeneration came about	Seacroft, Leeds	Research paper	Expediency or the most appropriate form of retail development for deprived areas. The article examines the case for large food retail store development in Seacroft.

4.16 The literature contains a number of case studies of regeneration schemes. These are discussed in terms of impact in section 5 of this review. Table 4.3 examines how these schemes came about. The regeneration schemes in the table vary in terms of scale and retail component. Common themes in these examples include the recognition of a “problem”, the development of partnerships to deliver the solution, the involvement in some of major private stakeholders and the requirement for funding to begin the process. Some have been delivered

strategically through the planning process, whereas others are outside such mechanisms. Formal monitoring of impact over time and against “control” situations has not been undertaken in most cases and so policy effectiveness is highly subjective.

Table 4.2 Development origins of Selected Retail Regeneration Schemes

Development/Initiative	How development came about
West Quay, major town centre shopping centre, Southampton	Regional planning guidance had identified Southampton as a priority area for regeneration. The City Council was extremely keen to see the town centre redeveloped. Initially smaller projects had been suggested but these did not materialise. West Quay is a private sector led development but one which gained the backing of the City Council and which their strategic retail planning had prepared for.
Tesco, St Rollox, sub-centre superstore	Retailer-led regeneration project as part of Tesco’s regeneration programme. Springburn had been identified as lacking convenience provision in 1992 and the intention was to expand the existing shopping centre but this did not happen. Outline retail planning permission existed for the St Rollox site but not for a major foodstore. This was renegotiated by Tesco and a regeneration partnership set up to maximise benefits, particularly in terms of employment, for the surrounding area.
Merry Hill, Out of town regional shopping centre, Brierley Hill	The original shopping centre began as a retail park on an Enterprise Zone. It has since been enlarged and redeveloped and extended. Planning permission was not always straightforward with plans being called in. Merry Hill sought to become recognised within regional spatial strategy as a town centre but failed. The setting up of the Black Country Consortium which is a public private partnership and the Brierley Hill Regeneration Partnership enabled the centre to become recognised as a force for regeneration within the area.
Bullring, major town centre development, Birmingham	The Birmingham Alliance was a partnership set up to redevelop the Bullring. It brought together two property developers and a major investment Fund. They worked with the City Council to ensure alignment of commercial, social and economic interests in the redevelopment including provision for the city’s market.
Castle Vale, shopping centre development in sink estate, Birmingham	Castle Vale Housing Trust was formed in 1993 with government and European funding. Sainsbury’s were invited to tender for the revamping of the shopping centre. The Housing Action Trust was later dissolved and a number of trusts established to take forward improvements for the community and local environment funded from the redevelopment receipts.
Glasgow Fort, sub-centre shopping centre	The Glasgow Fort Partnership was set up to maximise opportunities from the Glasgow Fort retail development. Under the ‘Linking Opportunity and Need’(LOAN) agenda the Glasgow East Regeneration Agency entered into partnership with the developer, marketing agency and employment agencies. A small amount of funding was obtained from the European Social Fund.
Border small towns, market town initiative	An initiative by South of Scotland Alliance, COSLA, Scottish Borders Council and Dumfries and Galloway. The initiative arose following a conference on small towns under threat. The aim of the initiative is to develop whole town strategies cutting across existing sectoral approaches to small towns in terms of responsible departments, existing initiatives and sources of funding.

Aberdeenshire Council	A conference on small towns highlighted strategies these towns could take. One example was themed towns. Castle Douglas food town, Wigtown, book town and Kirkcudbright artist's town. These came about through a series of local authority rebranding of towns to create a speciality market which would increase trade to the towns. The projects are community-led. They have received funding from the local authority and other sources including European funding.
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4.17 Partnerships and collaborative working are at the heart of many of the projects that have come to fruition. But not all partnerships will be the same or be of equal success. URBED (2005) produced a set of principles that can help in this respect. They indicated that town centres are assets to be managed and thus there need to be a focus on centres at 'tipping points' and not after decline has set in. This suggests careful and sustained monitoring of performance. Regeneration is a holistic process which occurs over a long period. It tends to work when expertise is built through sustained collaboration, and through the encouragement of interactions. One core element is the need to create confidence to attract investment and thus it is important to keep things as simple as possible. Like much of the work in this area, this approach is strongly informed by a number of projects in which the authors are involved or have knowledge, but it is not fully grounded on a systematic review of what works in partnership terms and what does not work, and an understanding of why this might be.

4.18 The summary on policy for town centre retailing is:

- Town centres are at the heart of policy
- Scale and context matters significantly to town centres
- Better understanding of the attributes of town centres is needed in order to allow comparison over time
- Various management approaches to town centres have been implemented
- There is currently a lack of systematic research on the approaches and policy adopted towards town centres, their management and regeneration.

4.19 The summary on policy on retail-led regeneration is:

- There can be disputes over what may be seen as conflicting policy agenda
- Many proposals have to "work-around" the local situation to identify what will be allowed
- Partnerships at various levels are fundamental to achieving outcomes
- Projects developed tend to stress (supposedly) demonstrable impacts and benefits
- There is an emphasis on the quantitative rather than the qualitative impacts (or "hard" versus "soft" benefits)

- Assessment of policy effectiveness is partial, piecemeal and subjective

5 THE IMPACT OF RETAIL ON THE REGENERATION OF TOWN CENTRES AND LOCAL HIGH STREETS, AND THE IMPACT ON THE WIDER COMMUNITY

- 5.1 One of the key problems in assessing impact is the variability amongst the evidence and case studies. There is some academic research and also reports by developers and retailers. In terms of the literature review, local authority material is scarce. There is a mismatch in volume of material between local authorities and developers/retailers. There is a lack of shared experience. Small scale projects are rarely evaluated. The evidence base is variable in quantity, quality, approach and detail. What literature there is tends to focus on large scale and/or out-of-town situations, meaning that there is a lack of published evidence over the range of retail regeneration approaches and impacts in town centres, including the recently developed BIDS. Table 5.1 summarises the potential outcomes of retail-led regeneration and retail development projects, as covered in the literature. It provides the structure for this section of the review. The approach taken is to present the discussion supported by a table of the key references and their contribution.

Table 5.1 The Potential Outcomes of Retail-led Regeneration and Retail Development Projects

<p>Outcomes: Retail Structure</p> <ul style="list-style-type: none">• The outcomes of retail-led regeneration initiatives will reflect the nature of existing retailing, the place specific regeneration needs and the way the development is carried out.• Retail churn is an outcome of retail regeneration. The extent of churn, the length of time it lasts and the final impact on existing retail structures will depend on the variety, fabric and 'health' of existing retail structures. The fit of new developments with existing ones will impact on the regeneration outcome.• Retail change through new retail representation or retail formats may re-vitalise an area. <p>Outcomes: Business Development</p> <ul style="list-style-type: none">• Weaker economic environment poses particular challenges to investors.• Working in these environments requires understanding of business models by local authorities <p>Outcomes: Employment</p> <ul style="list-style-type: none">• Employment impacts will depend on the employment needs of an area (but aspects such as job security and skills must be part of the equation). The jobs may also provide a stepping stone back into work <p>Outcomes: Community</p> <ul style="list-style-type: none">• Affordability of fresh foods• Increased accessibility of fresh foods <p>Outcomes: Wider Regeneration</p> <ul style="list-style-type: none">• Retail-led regeneration has a catalyst effect on getting regeneration started through rapid injection of capital and site reclamation• There is no guarantee that retail-led regeneration will attract other uses but there are examples where it has done so successfully <p>Achieving Regeneration</p> <ul style="list-style-type: none">• Partnerships will vary in how much they are developer or local authority led
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| <ul style="list-style-type: none">• Creating confidence is a key (but hard to measure) output from retail-led regeneration |
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Outcomes: Retail Structure

- 5.2 There has been much debate over what level of retail investment was appropriate in terms of retail-led regeneration. This has been couched from both the perspective of existing retailers fearful of the impact on their businesses and from the perspective of what consumers might want. Research in terms of consumer preferred options would seem to favour superstores as far as food retail provision is concerned. Initially, social inclusion/exclusion agendas in terms of retail-led regeneration had suggested that smaller retail investments might be more appropriate. Ethnographic and survey research suggests that this is not so. In poorly provisioned areas consumers tended to shop outside the area for food, seeking out large foodstores for their weekly shop. For a few groups there is some evidence that other retail formats will meet specific needs, but overall the business format of the large foodstore offers a wider range of affordable fresh foods. Store switching also indicates that a large foodstore can clawback consumers to a deprived area. The extent to which this strengthens community identity and cohesion is less easy to measure.
- 5.3 One of the greatest concerns expressed when retail-led regeneration is suggested is the impact that the new developments will have on existing retail structures. The issue is not straightforward. There are a number of key dimensions to the problem. The nature of existing retail structures will affect the extent to which the new retail development will compete with, add to or replace the existing retailing in an area. There is also the issue of which other retail areas might be affected, related to the scale and location of the development. Additionally there is concern over the way that an area will respond to change both in the short and long term. In areas where retailing is poor in terms of physical fabric, potential for building adaptation, lack of multiple retailers and poor range of fresh products, new developments have the potential to improve the retail performance and act for the retail sector in a regenerative way. Evidence suggests that new retail developments result in churn as places and existing retailers adapt to the new development. Churn can involve relocation of retail outlets or changing uses of retail outlets. It can also be observed in rental values before and after the opening of a new development. The extent of churn, the period over which it occurs and the nature of churn in terms of what shops close or open is not currently known from published sources.
- 5.4 Some commentators think that local retailers may lose substantial trade volume which threatens profitability. Acceptable levels of impact are difficult to determine. A 20% trading impact measure is often found for food retailing but this is not meaningful even if could be proven, without knowledge of the sustainability and profitability of existing retailing. Many shopkeepers say that they will not be able to exist after a new large

store opening, but appear still to be trading some time later. Inevitably there will be store casualties but it is hard to determine how many of these reflect more general trends or poor store management. There is some evidence of the loss of high street pharmacies where large new foodstores with instore pharmacies open. Some types of smaller foodstores such as bakeries seem to be relatively unaffected. The Competition Commission (2007) suggest that claims (e.g. by the Association of Convenience Stores) of widespread decline in smaller stores consequent on new store opening are wrong. These results underline the need for more detailed analysis, less overarching statements about widespread decline and that a more local consideration is required.

- 5.5 In the case of town centre shopping developments, integration into the urban fabric and the way that the new development blocks or facilitates interaction with the rest of the town centre will be important. Increasingly development is being better designed to be an integral part of a town centre or high street, rather than simply be a place in the town centre or high street. The impact on retail structures of such schemes is not clear, though most large schemes are predicated on attracting “new” multiples to the development or town and improving the “ranking” of the place.

Table 5.2 Retail Structure

Study	Research Question	Location	Type of Study	Findings
Boarnet, M. et al. 2005	Economic cost benefit analysis of retail development in a local economy	US	Empirical research	The article argues for the use of economic cost-benefit analysis in the evaluation of a proposed supercenter. 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.
Cummins, S. et al. 2005b	Impacts of food retail-led regeneration	Glasgow	Survey based research	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.
Federation of Small Businesses 2006	The impact of supermarket development on small retailers	Dumfries Alloa Dingwall	Sector based study	Declines in independent shops are attributed to the arrival of supermarkets

Guy, C. 2002	Shopping patterns in deprived area	Seacroft, Leeds		Guy presents results on the types of shops where people actually purchased their main food shopping and how they perceive their shopping trips. The majority travelled to a superstore which was outwith the Seacroft area. 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
Guy, C. 2004	How do neighbourhood stores contribute to food provision in deprived areas?	Cardiff	Research Paper based on field work	The fresh food offer in neighbourhood stores is often limited and in the case of symbol group stores expensive.
Guy, C. et al. 2004	Access to food retailing	Cardiff	Research paper based on field work	Data for a twenty year period is used to assess changing accessibility. 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 Enumeration Districts have become worse off in terms of access to high quality food retailing.
Hitchman, C. et al. 2002	How do people in poor areas shop?	UK	Research monograph based on interview and food diary data	A key finding is that small shop provision in deprived areas would not offer low income families the type of shopping opportunity they require.
Lowe, M. 2005a	Integration of retail developments	West Quay, Southampton	Research paper	The article evaluates the role of the scheme in promoting urban regeneration concluding that it has been successful adding to the city centre's vitality rather than transferring shopping from one part of the city centre to another.
Lowe, M. 2005b	Impact of a new retail development on use of other areas of the city	West Quay, Southampton	Research paper based on shopper surveys	Explores the synergistic relationships between West Quay and the rest of the city centre, vacancy rates in the town centre and improved perceptions of the city centre as a retail/leisure destination. Footfall figures and shopper responses indicated wide use of both the new and existing

				centre of the town. The new centre has not created retail blight in other parts of the town centre.
Whelan, A. et al. 2002	What are shopper preferences in regeneration areas?	Seacroft, Leeds	Research paper based on focus groups	Families with older children, for example, favoured going to a major superstore for their weekly shopping but those with toddler age children sought cheaper alternatives and were less concerned with diet and food quality.

Outcomes: Employment

- 5.6 Retail-led regeneration has almost always made the case that the new development would alleviate problems of unemployment in the local area by creating new jobs, improving skill levels and by reducing unemployment, often amongst the local, long-term unemployed.
- 5.7 There are studies which give the numbers of new jobs which retail-led regeneration has created and the ability to move people from worklessness to employability. The nature of the partnerships developed has generally included job agencies and local colleges which will be involved in the recruitment and training process. There have been attempts to quantify retail employment outcomes through the use of job multipliers to take account of the construction jobs involved and other ancillary jobs in for example servicing the retail development. Such studies tend again to be focused on large-scale and/or out-of-town superstore development.
- 5.8 The literature would suggest that immediate local employment objectives are fulfilled. A major development such as the Bullring would employ a substantial number of people e.g. 2500, with about 50% from groups in need of employment. A superstore development could provide 300 or more jobs with 66% take up from unemployed groups in a deprived area recorded. More disputed is the extent to which displacement of jobs occurs and whether, as new jobs are created, others are made unemployed. There is not much good evidence to affirm or dispute this. There has been discussion about the jobs created, contending that they are only part time and that retail does not offer “good” employment. Employability can however be increased. It does seem that retention rates of employees in retail-led regeneration schemes are reasonable. What limited evidence there is suggests that the employment created would be justified in regeneration terms for the immediate areas.

Table 5.3 Employment

Study	Research Question	Location	Type of Study	Findings
Dixon, T. 2005	Does retail regeneration create real employment benefits	UK	Research paper	Calls for better measures of employment impacts of retail-led regeneration to give a broader picture of retail change
Dixon, T. and Marston, A. 2003	Employment multipliers and retail led regeneration	Aberdeen Norwich Bristol	Research paper	A significant review of the role of retailing in regeneration and as an economic driver in the context of urban regeneration. It includes useful review material on retail industry performance and the policy environment. The focus of the report is the section on property end employment multipliers from retail-led regeneration. Attempts to quantify impacts are included.
King Sturge 2006	Contribution of retail employment to regeneration	UK	Lobby group paper	Puts forward the case for retail employment potential in retail-led regeneration
Mitchell, A. and Kirkup, M. 2003	Developing skills and employment benefits	Castle Vale, Birmingham	Research paper	The Sainsbury's development has had appositive impact on employment.
Roberston, J. and Fennell, J. 2007	What are the economic effects of shopping centres?	Metro Centre Braehead Meadowhall Bluewater Cribbs Causeway Merry Hill Lakeside	Developer review	Job displacement is relatively unimportant in comparison to job creation.

Outcomes: Community Impacts

5.9 It is not entirely clear what community outcomes might be anticipated from retail regeneration. Impacts on perceptions of town centres are rather limited. Provision of more affordable foods is often cited as a community outcome of a superstore intervention. In many ways the community aspect has become displaced by the health agenda. This has sought to establish whether improved access to fresh foods through new supermarkets could change dietary behaviour. Both the Seacroft study and the St Rollox study focused on health impacts. Opinion remains divided about the outcomes, but suggests that any effects would be small and specific to defined groups. The St Rollox case study did show that psychological health was improved, which in itself is significant in a regeneration context.

- 5.10 Changing customer patronage can also have a community benefit. Clawback of customers can engender a renewed identity for a community. This has been shown to occur in the case of Tesco regeneration stores where outshopping was common. Where a retail development brings together a new set of customers it can also reduce social exclusion. The localised employment base also adds to a sense of community involvement.
- 5.11 Other community impacts could follow through Section 106 or equivalent agreements (Section 75 in Scotland) whereby environmental improvements may be part of the project. This would seem to be an important potential component of place improvement. Additionally retailers engage in some form of relationship with the community, often becoming involved in organising community events. They may also be involved in trying to change local behaviours. Boots, for example, in Glasgow Fort has become involved in a health improvement programme. It is also argued that the increased employment lifts some of the households out of the poverty trap. Usually schemes are in place to ensure that those moving into training and work are not worse off than when they were on benefits.

Table 5.4 Community Impacts

Study	Research Question	Location	Type of Study	Findings
Cummins, S. et al. 2008b	Switching and social exclusion	Glasgow		Clawback and switching to the Tesco superstore occurred decreasing outshopping.
Cummins, S. et al. 2005a, 2008a	Food deserts and health	Glasgow	Quasi experimental intervention	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. et al. 2005b	Health impacts of retail-led regeneration	Glasgow	Survey based research paper	This article reports on the findings of a study of a food retail intervention in Springburn in Glasgow. Retail change, diet, self-reported health, perceptions of the environment and psychological health were investigated. The study observed some positive impact on the existing retail structure and weak improvements in diet and psychological health. A control area was used in order to take account of background changes.
Findlay,	Retail	Galashiels	Survey	Clawback occurred in Galashiels

A. and Sparks, L. 2008b	network impacts of retail development		based research paper	following new retail development. At the same time the development led to outshopping from other Borders towns concentrating retailing in Galashiels in preference to other centres.
Kyle, R. and Blair, A. 2007	Appropriate fresh food provision	Sandwell	Research paper	Shop heterogeneity is important as different consumer groups use different shopping strategies.
Lavin, M. 2005	Providing healthy foods; what type of format works best?	US	Research paper	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.
White, M. et al. 2001	Is access an issue in healthy eating?	Newcastle	Research report	The study was unable to establish a relationship between retail provision and diet although unhealthy eating was associated with living in a deprived area.
Wrigley, N. et al. 2003	Do shopping interventions impact on health?	Seacroft, Leeds	Research paper based on survey data	Some limited impact on improved diet for a few of those with poorest diets was observed following the store opening. Switching occurred from discounters.
Wrigley, N. et al. 2002	What shopping factors influenced diet?	Seacroft, Leeds	Research paper based on survey results	No association between transport and diet was found. Some association between store selection and diet occurred. Store switching from discounters improved diet for a few people.

Outcomes: Business Development

5.12 Retail-led regeneration arguments have in some cases been realigned under the Under-served markets banner, organised by Business in the Community. This extended initiatives to set up regeneration companies to attract businesses to deprived areas. The Under-served markets programme was broader than retail, but it also developed the retail strand. The practitioner focused approach sought to see what worked and how to marry the different needs of business and community in terms of the challenges presented by working in weaker local economic environments. The reports which resulted from this highlight the areas where local authorities and retailers needed to come together to make a difference by pinpointing their different agendas and concerns. This was important work as it emphasises feasibility and the need to move to understanding how to maximise potential benefits of retail-led regeneration. The key references to this work are Under-served Markets: retail and regeneration (Business in the Community 2007) and the various conference papers and presentations that have formed part of the “roadshow” (e.g. Boler 2008, Dibb 2007, Lee 2007, Rich 2008, Smith 2007, Sunter 2008).

5.13 Retail regeneration offers the opportunity for an area to gain new retail formats and new retail representation, though there remains concerns over impacts. Retail-led regeneration may be important in modernising retail sectors and in creating local and investor confidence. These have not been planning priorities but retail formats are important parts of retail business operations. Putting together the partnerships, developing the local benefits and cutting through policy problems take time, but appear to be essential. Analysis of what makes a successful partnership is less common.

Outcomes: Wider Regeneration

5.14 Community involvement is a key element of retail-led regeneration. Most retail regeneration engages in some community involvement. Place identity and image are important. Arguably the visibility of a major retail development will improve the image of a place through the association of a major developer or retailer with the place. This is seen as an expression of business confidence in an area. This confidence adds to the sense of place for the community. Synergy with other sectors seems limited. In particular retail regeneration has had limited interaction with local suppliers. The leisure sector offers the most obvious regeneration synergy particular in the context of a diverse range of town centre uses. Studies indicate mixed responses to this. The necessary and sufficient conditions for wider regeneration remain poorly understood but the need for a long term perspective is important.

Table 5.5 Wider Regeneration

Study	Research Question	Location	Type of Study	Findings
Brierley Hill Partnership 2007	Has Merry Hill led to other regeneration in the area?	Merry Hill	Review evaluation	Although Merry Hill initially came in for criticism over impact on Dudley town centre, this report affirms that the area has benefited in terms of employment, improved image and other investment as a result of the Merry Hill shopping centre investment.
Guy, C. 2007b	What wider effects can be expected from retail-led regeneration?	Cardiff	Research paper with case studies	Examples are used to show how retail led regeneration has kick-started regeneration and created increased confidence. In the case studies other regeneration in the area did not always follow as anticipated.
Lowe, M. 2007	Is retail-led regeneration a catalyst for other development?	West Quay, Southampton	Research paper based on interviews	The regeneration role of West Quay is broadly regarded as highly successful and has a very positive effect on Southampton in a number of tangible ways.
Roberston, J. and	What are the economic	Metro Centre Braehead	Developer review	Retailing offers the opportunity to establish an area as a

Fennell, J. 2007	effects of shopping centres?	Meadowhall Bluewater Cribbs Causeway Merry Hill Lakeside		proven location for inward investment.
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Achieving Regeneration

5.15 In the tables above, a number of case study examples have been included. The evidence however is partial and conclusions often rely on few case studies. Their importance should not be stretched beyond the evidence collected. The balancing act required to make retail-led regeneration work will always involve both positive and negative outcomes. Maximising potential benefits can best be achieved by looking at how the development will address the key issues addressed throughout this section. This type of framework is required for a more finely tuned approach to retail-led regeneration to be adopted. Not all areas require regeneration on the same scale or seek to achieve the same goals. They do not start from the same place or advantages/disadvantages. The difficulty of drawing comparative tables of research findings suggests that is essential to conceive of regeneration effects rather than an all encompassing view of regeneration.

5.16 Evaluation of progress is critical but often lacking. Examples would be the study of Brierley Hill (Brierley Hill Partnership 2007) and the recent case study of Glasgow Fort (Scottish Government 2008). These are distinctive in respect of the fact that they are focused on the regeneration impacts and process rather than being linked to other agendas. Evaluations of this kind must be encouraged if best practice is to be established.

Table 5.6 Achieving Regeneration

Study	Research Question	Location	Type of Study	Findings
Business in the Community 2007	Food retail-led urban regeneration	UK	Good practice guide	This paper is a guide to what can be achieved in attempting to instigate food retail-led regeneration in the context of current planning guidance. It raises questions which should be asked to maximise returns to an area from retail-led regeneration projects in the context of under-served areas. Sections in the report consider the potential of retail-led regeneration, the challenges of retail-led regeneration,

				encouragement of investment and working within the planning regime. Boxed case studies give cameos of specific examples of good practice.
Emery, J. 2006	Making partnerships in retail-led regeneration work	Bullring, Birmingham	Developer perspective	The Bullring in Birmingham offered through the partnership project a unified direction which has facilitated the implementation of the project. Engagement with the local community has been important in the project with ideas about design and also tenant mix emerging from this process. Permeability of the centre has been a key aspect of the design as has the inclusion of mini pitches.
Lowe, M. 2005a	How can retailing deliver successful places	West Quay, Southampton	Research paper	The regeneration role of West Quay is broadly regarded as highly successful and has a very positive effect on Southampton in a number of tangible ways.
Mitchell, A. and Kirkup, M. 2003	Regeneration agencies and stakeholders	Castle Vale, Birmingham	Research paper	Cooperation between agencies and stakeholders is the key to successful retail-led regeneration
Otsuka, N. and Reeve, A. 2007a	Can town centre management assist regeneration?	Reading Birmingham Doncaster Wigan	Research paper	Through community-led initiatives town centre management can reduce inequalities between advantaged and disadvantaged areas.
Otsuka, N. and Reeve, A. 2007b	Can town centre management assist in regeneration?	UK	Research paper	Different regeneration agendas have different potential to use town centre management
Scottish Government 2008	How can regeneration benefits be maximised?	Glasgow Fort	Regeneration partnership review	Evaluation of how regeneration worked identifying what can be learnt
Smith, H. 2008	How can retailing's contribution be maximised in a regeneration project?	Leicester	Conference /Workshop	Retailing is key to regenerating an under performing city centre.

5.17 The key issues arising from this consideration of impact are:

- Retail-led regeneration can offer major benefits, but these do vary

- There is an insufficient number of studies of the different types of retail regeneration being promoted and achieved within town centres
- There are not enough “before and after” and/or comparative studies to assess impact
- All retail-led regeneration will not deliver the same outcomes or produce the same impacts (whether positive or negative)
- Research has produced ambiguous findings on retail-led urban regeneration; this mix of outcomes may derive from an inadequate understanding of the process of regeneration in very different areas
- Much of the research has focused on food-led regeneration, with less consideration of other types of schemes
- Qualitative dimensions of impact need to be considered as well as the quantitative ones.

6 CONCLUSIONS

- 6.1 The literature on the issues of healthy town centres and high streets and on retail-led regeneration is somewhat variable. It derives from a variety of authors and situations. There are issues over the coverage of the literature in terms of scale and type of high street, town centre and retail regeneration scheme. It is hard to draw firm conclusions from the literature. At one level we perhaps should expect this as the situations themselves vary so much.
- 6.2 However, there is an argument that the knowledge base of these subjects is hampered by an overall data inadequacy that is long standing. It is not routine to monitor town centres and high streets in a uniform and regular pattern and to undertake research in a suitable longitudinal way against specific and common criteria. Better retail monitoring could deliver benchmarking for assessing retail change. Some data sets are now being made available for England and Wales (see <http://www.planningstatistics.org.uk/>). Concepts such as retail vulnerability and retail churn are relatively unexplored. Reliance on case study data means that we know what questions to ask rather than having a template to work from.
- 6.3 Vibrant and healthy town centres and high streets take many forms and come in many shapes and sizes. Town centres are generally higher-density, mixed-use, accessible centres with a sense of local place and community. Key dimensions of a healthy town centre include being places with identity and legibility, places which are well connected, convivial and where retailing is conspicuous, compatibility of functions within the place, being competitive and having a coordinated strategy. Within that the key dimensions of a healthy retail sector include good retail mix, choice, diversity, anchor stores and preferred shopper formats and fascias, low vacancy rates, low turnover, good physical fabric, competitiveness and capacity for change
- 6.4 The variability in town centres and high streets and in their contexts and situations means that policies and approaches to town centres and high streets come in a variety of forms. These range from the formal strategic planning, through management approaches and partnerships such as town centre management and BIDS, to a myriad of local smaller initiatives and schemes. Town centres are at the heart of policy, but an understanding of the impact of the approaches and policies is difficult as the base line understanding of the situation of town centres and high streets is somewhat underdeveloped. This means that it is difficult to compare the trajectory of high streets and town centres over time and on a comparable basis. There is currently a lack of systematic research on the approaches and policy adopted towards town centres, their management and regeneration. In terms of retail-led regeneration, there can be disputes over what may be seen as conflicting policy. Many regeneration proposals have to “work” around the local situation to

identify what will be allowed. Partnerships at various levels appear to be fundamental to achieving outcomes, but in the literature there is not much detailed assessment of policy effectiveness or partnership working, and the material appears partial, piecemeal and subjective.

- 6.5 Large-scale and out-of-town retail-led regeneration appear best placed to deliver targeted outcomes, though it is recognised that the literature is slanted towards such schemes. Employment outcomes are the most obvious example. Wider regeneration outcomes are limited with image of an area and its integration into the wider urban area most significant. These can create consumer and investor confidence in much the same way as town centre retail development. This is harder to measure, particularly in the short term. In terms of impact it would seem that retail-led regeneration can offer major benefits, but these do vary. However we do not have enough “before and after” studies to be sure of impacts in different circumstances and over time, and particularly in terms of town centres. All retail-led regeneration will not deliver the same outcomes or produce the same impacts (whether positive or negative). Research has produced ambiguous findings on retail-led urban regeneration; this mix of outcomes may derive from an inadequate understanding of the process of regeneration in very different areas. Much of the research has focused on food-led regeneration, with less consideration of other types of schemes.

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