

Far from the ‘Magic of the Mall’: Retail (Change) in ‘Other Places’

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Abstract: A pre-occupation with the 'new' and a focus on corporate retailers and spaces has led to a lack of consideration of change and issues in secondary or 'other places' of retail. Using a longitudinal survey methodology, data on retail stock, churn, vacancy and use are considered for one such 'other place' – Shettleston in Glasgow. The data show complex dimensions and aspects of vulnerability and resilience, compounded by reactions to exogenous retail and other economic and social changes. Far from being 'seedy, pre-historical backwaters', Shettleston and similar 'other' places can be vital, local centres playing a variety of useful roles. They require support and attention every bit as much as more high profile town centres and high streets.

Keywords: Retail, Town Centres, Vacancy, Tesco, Shettleston

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The death of the high street and the decline of the town centre have been widely debated, with the finger of blame being pointed to decentralisation of economic activities, as with regional shopping centres and food and non-food superstores and changing consumer behaviours (Dawson, 1988, British Retail Consortium, 2009, Department for Business, Innovation and Skills, 2010, 2011, Portas, 2011). This polarisation between traditional town centres and off-centre or out-of-town modern retail development is misleading, however, as much retail activity still takes place in local centres, local high streets and parades and other often overlooked locations. We know little about retail change in these locations (Findlay and Sparks, 2008a).

In both the media and the academic literature there is ambiguity over terminology amongst high streets, town centres, district centres and city centres. Planners designate centres within larger conurbations as having town centre status. These are sometimes described as district centres. However these 'town centres' are usually regarded as secondary retail locations, though secondary locations also include parades of shops, neighbourhood retailing and periphery streets in 'major' town centres. All may, or may not, be viewed as high streets. Such subsidiary places have often been overlooked, due to a focus on town centres, modern decentralised locations and corporate retailers. They are commonly regarded as backward and problematic. Being neither new, nor the focus for urban regeneration, secondary spaces, such as local centres, have become the 'other place' for retailing.

This focus on town centres and modern decentralised spaces has produced a lack of knowledge about contemporary retail change in these 'other places' of retail. In this paper we seek to rectify a small part of this, by considering retail change in a secondary location, developing an understanding of how these changes can be measured and understood. This involves longitudinal work in a specific

location. The paper thus provides contributions to methodology, conceptualisation, measurements and implications in contemporary retail change.

We begin by discussing issues in retail change and retail places. We then present the research context and methodology. A data analysis section follows, with discussion and conclusions closing the paper.

RESEARCH CHANGE

Few studies of secondary shopping have been undertaken; the 2004 study commissioned by the National Retail Planning Forum is an exception (CB Richard Ellis, 2004), though there are some land-use planning focused studies (Guy, 2010, Coyle and Flowerdew, 2011). Everts and Jackson (2009), developing ideas of historicisation, show how some types of retailing are regarded as historical, or of the past, even though they are still in use. This concept applies, however, as much to retail places as to retail formats. Certain types of consumption spaces can be regarded as historicising; they continue to function and there is something to learn from such places, but they are perceived as being in the past, perhaps incorrectly as they are often key hubs for local communities providing accessible local services (London First Retail Commission, 2009).

Consumption places have become historicised for several reasons. First, they are victims of the waves of development, both in town centres and out-of-town, which have privileged the 'new' and focused on destinations, as opposed to localisation. This is a real change, but can be overstated. This is compounded secondly by the scope and nature of data collection on retailing. The demise of the Census of Distribution after 1971 (Sparks, 1996) and the political dismantling of local authority capability in this field since the 1980s, diminished the availability of spatial retail data. This data gap has been only partially filled by private retail data sources. Spatial retail data collection has become largely privatised (Experian GOAD and The Local Data Company being key players in the market). These organisations seek to meet market demand for data and thus focus on national multiple retail

outlets and larger/or discrete centres i.e. the formats and places for which demand is commercially viable (as opposed to interesting, useful or local). As a result, data is not collected on many secondary retailing areas, or for dispersed neighbourhood retailing. Coverage is partial in all senses of the word (Hallsworth et al., 2010, Hallsworth, 2010), with benchmarks calculated on 'mainstream' areas, which are only part of the picture (Guy, 2011).

Additionally, there is less engagement in secondary areas by large institutional property investors and thus limited new development (Jones, 2010). Neglect of certain types of areas because they are not of interest to the private sector has led to these areas/places being perceived as anachronistic and as misfits with contemporary retailing. However whilst there is a fascination with the new and the different, the reality is that many of these 'forgotten' places hold meaning for consumers in their daily lives and routines. This may not be the nature of every such place, but for some they are crucial to their local neighbourhoods. Conceptualising and understanding these places is thus important, particularly in the face of substantial retail change.

Much research on retail change has taken either an economic or a cultural perspective (Wrigley and Lowe, 2002). The lesson from both is that retail spaces, and the use of these spaces, are not theoretically bounded and that retail spaces have both an economic and social role, demanding study at a variety of scales and from different theoretical standpoints.

Cultural studies have focused on meaning and identity through ethnographic approaches. Reading the street and urban spaces, cultural studies engage with how people use spaces in relationship to how they feel about them and how their identity fits within them (De Certeau, 2002). A worked example of this (Wood Green) is given in the study by Miller et al. (1998). Fyfe's (1998) collected papers on the theme of 'The Street' together highlight the importance of understanding sociality i.e. the interaction and cooperation in the practices of everyday life (Shields, 1992, Wrigley and Lowe, 2002) as a key characteristic of successful streets. This is in counterpoint to an economic reading of

change and place which focuses on the viability of businesses and formats and their financial success or otherwise.

Most studies of retail change in town centres have been undertaken within planning authorities or by consultants. This has meant that most studies are land-use planning policy driven and often lack a theoretically informed context. More specifically there has been a lack of studies which theorise across retail change in terms of common threads or approaches. The recent paper by Wrigley and Dolega (2011) is an exception. It studies the impact of recession in town centres by considering the relationship between vacancy and certain geographic characteristics of towns, to establish a typology of places based on theories of resilience. However this work does not cover the sorts of secondary or 'other places' considered here.

There is thus a need for studies which report on retail change in these 'other places' s. Such locations are part of the wider picture of retail change and they matter to local communities and concepts of place. Retail change is an on-going process and the impacts of these changes need to be better understood. As a first step in considering retail change in this way we need to identify the dimensions and measures of change in places. Too often change is not explored contemporaneously (and then has to be (partially) rebuilt, made difficult by the data issues raised above) or is reduced to recollections from surviving local consumers (who often express nostalgia for places). Understanding retail change in 'other places' should instead begin with 'mapping' that change over time and measuring it in various ways. The process of mapping and measuring in a systematic, contemporaneous, longitudinal way allows us to answer our research questions:

- What changes can be identified in a secondary retail location, and what are the appropriate dimensions of these changes?
- How can we explain the direction and extent of such local changes by reference to exogenous and other factors?
- What are the conceptual and other implications of such work?

METHODOLOGY AND MEASUREMENT CONCEPTS

As outlined above, there are data issues to be confronted in such research. A starting point in overcoming these is to focus on a local area and to put in place a systematic detailed, bottom-up data collection process. The research reported here began in 2001. Our initial interest in inner suburban areas in Glasgow began when Tesco was seeking permission for a store in Shettleston, as monitoring retail change must be a precursor to understanding the impact of change (Cummins et al., 2005a). The primary data used is survey work on retail premises which has been carried out annually over the last 11 years. The same personnel have undertaken the survey work each year, bringing consistency of data collection as well as an in-depth first hand knowledge of the area. The survey work itself involves walking the streets of the selected area, carrying out a census of retail units. Data have been routinely collected on location, fascia, occupancy, vacancy and retail line of business. Given the part time opening of some shops several visits are made on different days of the week to ensure that the surveys present an accurate picture of which stores are trading. This base data forms the core of this paper, though clearly other calculations and measures can be generated from this (see below). Additionally, official data such as Annual Business Inquiry (ABI) data and Valuation Office Agency (VOA) data have been used. VOA data offers snapshot data on floorspace, rateable values and ownership type. ABI data provides information on employment and data units at a variety of geographies including post code level. Other private data sources are not available for the reasons noted above (Figure 1).

Data on perception of the area is limited. A questionnaire survey was undertaken in 2001 including questions on how people felt about the area as part of wider research on self-reported health, eating habits, shopping preferences and economic profile (Cummins et al, 2005b). A strong identity with Shettleston was observed. It is accepted that further research on perceptions and feelings would complement this initial benchmark.

The study location is Shettleston in the east end of Glasgow, defined as a town centre by Glasgow City planners. This is a classic 'other place', as will be shown later, though it is not positioned here as an exemplar. The study area is designated as postcode G32, which includes Shettleston Road, a major shopping street and the smaller shopping street Tollcross Road, as well as small parades of shops and stand alone stores. This postcode designation is a functionally coherent area of study, as it is bounded by major arteries to the south and north, an area of industrial land to the west and the distinctly socially different area of Baillieston to the east. Use of a defined statistical unit allows use of additional data sets such as ABI.

The absence of on-going data monitoring of retail change means that questions of timescales become significant. Impacts of new retail developments are not routinely subject to before and after studies and where such studies are undertaken the timescales for monitoring the intervention appear arbitrary. Here the decision has been taken to collect data on an annual basis for at least a decade, which appears to make this study unique.

Having collected the data, issues of measurement arise. In work for the Scottish Government and for the National Retail Planning Forum, Findlay and Sparks (2009, 2010) have argued for the importance of using informative measures of change. Key measures of retail change might include consideration of the definition of retail stock, churn, categorisation of vacancy and use categories.

Determination of retail stock often lacks definition. Figures on retail vacancy rates do not normally state what definition of retail stock they relate to, making benchmarking and comparative analysis problematic. Specifically, the inclusion of service activities in retail unit count remains unclear, with different analysts using different definitions of retail stock. VOA data and the survey data can be compared for Shettleston. Key differences surround the inclusion as retail units hot takeaway food, betting shops and financial services, which are not regarded as shops by VOA.

Churn monitors the level of change which may be ongoing in a retail setting. Vacancy rates do not necessarily mirror churn. Churn can be measured not only in terms of the number of units changing type of goods sold over a period of time, but also in terms of change in trading name or fascia.

The categorisation of vacancy is important in understanding its impact. What constitutes vacant is often an overlooked question. Vacancy can include obsolescent property, deliberate vacancy, short term vacancy and long term vacancy. Indicators such as length of time properties remain vacant and the number of properties becoming vacant can determine whether vacancy is an increasing problem or whether there is cumulative decline (Katyoka and Wyatt, 2008, Teale, 2009, Findlay and Sparks, 2010, Guy, 2011).

Use categories can identify both broader categorisation by convenience, comparison and service uses as well as detailed use of the unit and operating fascia. This permits changes in the function of the area to be distinguished from changes within these categories. It relates to aspects of churn.

In all these measures there are additional associated aspects which allow a finer grained analysis.

For example, whilst the dimension of time is clearly significant in understanding change, so too is the location within the survey area.

RETAIL CONTEXT: SHETTLESTON

‘In some parts time has stood still. Stroll down the Shettleston Road, one of its seedy arteries, and you will find yourself in another era – pre-Blair, pre-Thatcher, virtually pre-war’ (Tweedie, 2008, quoted in Mooney, 2009, 439)

Shettleston, the focus of this study, is a designated centre in Glasgow. Glasgow as a city has undergone a major transformation in the post-war era, as waves of economic and social change have altered the nature, make-up and (self)perception of the city (Pacione, 2009). Within Glasgow, Shettleston is one of the inner urban centres, perhaps most buffeted by change at one level (the people, industry and its place), yet retaining its core structure (the Shettleston Road artery). Despite

retail transformations elsewhere in the city over a long period of time (Pacione, 1979, 1982), Shettleston, has, until very recently, not been subject to major investment and development.

The area has some 28,000 residents and is highly multiply deprived (the highest Carstairs-Morris Depcat value of 7). It has the worst mortality rates in Glasgow, and has been widely reported as the only area where life expectancies are falling (Shaw et al. 2005). The external perception of the area is presented in the quote that opens this section, reinforced by the disparaging stereotype 'Shettleston Man' (Smith 2008 in Mooney, 2009): 'this individual has low life expectancy. He lives in social housing, drug and alcohol abuse play an important part in his life and he is always out of work. His white blood cell count killing him directly as a result of his lifestyle and it's lack of purpose' (p.443). The area retains much of its original character with the tenemented street Shettleston Road forming the core retail area (Figures 2 and 3). Less dense council housing forms the majority of the area, with only a very few high rise blocks.

The Annual Business Inquiry lists 5506 retail data units in Glasgow (Local Authority) in 2008. Of these 874 are in the city centre (15.87%). This is a comparatively small proportion. Major shopping centres such as Braehead (only partially in Glasgow) and Silverburn bring that total to 21% and East Kilbride adds a further 4.5%. This still leaves the majority of retail units in Glasgow outwith the main shopping centres. The Annual Business Inquiry figures used here refer to the SIC code for retailing and thus do not include other service uses found in the high street. ABI data relate to active businesses and thus give no indication of levels of vacancy.

Figures for retail employment show that of the 62622 retail employees in Glasgow, 20.26% of all jobs are in the city centre postcodes G1 and G2, rising to 36% of all employees if Braehead, East Kilbride and Silverburn are included. The size of the retail enterprises in the major centre is proportionately greater in employment terms than in other areas. Whilst the bigger businesses are in these centrally planned retail areas, a majority of retail employees are still found in other parts of the city. ABI data on retail employment excludes self employment, so that retail outlets run as family businesses are

excluded from the data (both number of units and employment). Figures in the recent DTZ report to the Scottish Government on the economic importance of retailing in Scotland show that estimates of self employment in retailing vary greatly from year to year; and given the small sample frame it is difficult to be confident of the size of this labour force or how it varies from area to area, especially when dealing with small areas (DTZ, 2011).

There are 108 retail businesses listed for G32 (Shettleston) in ABI in 2008 (152 units in 1998). This represents employment of 816 people (1.3% of all retail jobs in Glasgow). ABI data for Glasgow shows that between 1998 and 2008 the majority of postcodes showed a decline in retailing. The areas which showed an increase were those in the centre of Glasgow, areas with new developments such as Braehead, Silverburn and The Fort, the West End and East Kilbride. Of those areas showing a decline, Shettleston had greater decline than other areas. Inner city suburban areas generally showed a decline in the number of retail units. The total retail floorspace in Shettleston is an estimated 30,000 sq metres and the total rateable value £3.7m. Of that, 4500 sq metres are in the Tesco store and a further 2000 sq metres in older Coop stores (Institute of Grocery Distribution figures). The Tesco store opened in the summer of 2003 and was a significant development, being located just off Shettleston Road on Old Shettleston Road. The VOA figures show that Shettleston has 3.6% of Glasgow City retail units, but that they were worth only 1.2% of the total rateable value. This proportion of retail units contrasts with the ABI figure of 2% of retail units, suggesting a high presence of tertiary activities.

The picture drawn by official statistics is thus of an old traditional area in decline, but one where there remains a considerable number of retail units, presumably used by various populations. These stores appear to be small in nature, quite numerous, yet with low rateable values. It is a classic overlooked 'other place'.

RETAIL CHANGE IN SHETTLESTON

Shettleston in Glasgow is, like many other relatively deprived innersecondary locations,

nevertheless, an area with a significant retail stock. Lambie the butcher, Chinwags, Hooked in Scotland, Honest John's, Bone Sweet Bone and Hugs n' Stuff may not have the familiarity of better known fascias and brands, but have local importance. The area is only a short bus ride from the Forge Shopping Centre and in the other direction the more recently opened Glasgow Fort. It is well connected by public transport to Glasgow city centre.

Our survey work shows that the retail stock over the period 2001-2010 comprised 338 units including forecourts. There has been some slight loss in this overall figure due to combining of units or their conversion to units which no longer could become retail units again. There is no agreed method over what should be counted as retail stock, when properties should be no longer considered part of the retail stock and which uses should be included in the retail stock. ABI data does not include forecourts for example although the majority of these will have some sort of shop premise. VOA data retains the term shop in the majority of cases where a property still has the potential to be used as a shop and is not in currently in any other use. Although the survey data was collected independent of the VOA data (which in 2001 was not widely available) the figures obtained for the retail stock from the survey work and those obtained from VOA were broadly the same. The VOA retail stock in 2011 was 290 units. From the survey, a further 28 units were included in the retail stock figures which had fallen out of retail use and 4 units had been demolished over the period. These figures conceal processes of amalgamation and/or subdivision of units which have taken place during the 11 years. Table 1 presents the composition of the retail stock for 2001 and 2011.

The retail stock therefore represents three times the number of units which ABI records as being in retail use. Clearly in calculating vacancy rates confusion over what is counted as retail stock will inevitably lead to considerable variations in vacancy rates. The comparability of vacancy rates published by different organisations is unclear, as the basis on which they are calculated differs from provider to provider. In Shettleston there was a 12.5% vacancy rate based on the units in retail use

in 2011 (a rate the same as the Local Data Company calculates for Scotland as a whole). However there is room for considerable ambiguity over which premises are included, as there were 28 units in non-retail uses, but which form part of the retail stock and may at some point in the past 11 years have had a retail use (and therefore could again). For example constituency offices are often set up in shop units, as are credit agencies and housing association offices. If the figure excludes such premises then the vacancy rate would drop to 11.3%. Other uses such as betting offices often are ambiguous; increasingly these are setting up in high street locations due to the changes in use class category, but it is unclear whether they are routinely counted as part of the retail stock on which vacancy figures are based. The categorisation of eating establishments also varies. In Shettleston, on our data the average retail vacancy rate for 2001-2011 was 10.8% of retail stock. The 2011 rate is therefore above the average rate.

Vacancy itself is an ambiguous term (Findlay and Sparks, 2010). Here, units which were vacant (non-occupied) at the time of survey are recorded as vacant. However, this is insufficiently nuanced.

Vacancy can be used to refer to units which have been left vacant for a given period of time, such as three months, rather than being recorded as vacant when they are only in the process of changing hands. In practice, units were checked for this contingency. Persistent vacancy may be an indicator of retail obsolescence. Of the units which were vacant in 2001, only 2 were still vacant in 2011, one possibly a deliberate vacancy. The VOA data lists vacant units as those where the owner is seeking a new tenant or owner. Units where the owner continues to pay rates although the units are not trading as a shop, are not listed as vacant by VOA. Some may be used for storage; others unused.

Floorspace data showed a preponderance of vacant units in the smallest shop unit size-band; 80% of vacant units had a floorspace of less than 50 sq metres. This might suggest that despite being part of the retail stock, these units are functionally unsuitable for present day retail uses.

In Shettleston the proportion of multiple retailers is less than 10% (excluding betting shops and forecourts). Subway, Boots and Greggs have recently opened outlets in the area. Owner occupied

business property is significant with 46.9% of VOA listed retail stock being owner occupied. This reduces business mobility, although it was noticeable in the VOA data that there were owners who were trading from a leased shop of a different size in the same street as the property they owned. There was some institutional ownership, but more commonly units were owned by individuals. The dispersed ownership has implications both for achieving unit sizes which are commercially viable in the current retail environment and for general coordination and management. There has been combination of units where a set of units together became vacant or where a shop was able to takeover the adjacent unit. Unit sizes are small, with 80% less than 80 square metres, the generally recognised size definition of small shops (Figure 4). Rateable values are also low, only 4% of units having rateable values of over £25000 and thus eligible to pay full rates. Over 80% have rateable values of less than £6000 with 92% of units in the small business rates exemption category (Figure 5). More than half the owner occupied properties were in the smallest units. These figures suggest structural problems with the retail stock.

Tesco opened a major store in the area in 2003 so it might be expected that vacancy rates would show its impact. However, data suggest that the Tesco opening has not been the cause of retail vacancy in Shettleston (Figure 6). The lowest number of vacancies occurred in 2008, just before recession took hold. The 2011 number of vacancies remains lower than that of 2001. It might seem that Tesco had a positive effect on the area in some respect. Within the area average vacancy rates were 12.5% for the central retail area on Shettleston Road and 11.2% for the rest of Shettleston, but the overall pattern of change was similar in both areas.

Figure 7 assesses the length of time property has been vacant. This shows that vacancy for periods of at least three years are not new in Shettleston but, that as recession has hit, extended vacancy has become more common. Figure 7 suggests that 2011 was characterised by an increasing rate of new vacancy as well as longer term vacancy, probably reflective of the economic recession, and the

difficulty small businesses have in starting up in recession or in raising capital, as well as lower consumer spend.

Churn is an important but little used metric of activity in studying retail change, with thus not national benchmarks. Churn was measured as the number of units changing fascia or use between two consecutive survey periods (Figure 8). Levels of course might be slightly higher as some units could change more than once between surveys. There are several ways churn could be measured, but in this case it refers to change of fascia or type of goods sold. Over the period 2001-2011 an average of 10.8% of units changed in this way each year. Churn can be seen to be higher in the period around the time of the opening of the Tesco store. The impact of a major new store opening may thus be felt in the disruption the opening causes in the existing retail structure, with some businesses deciding to close ahead of the opening and the perception of the type of activity viewed as then viable changing (in that churn increased but vacancy did not). The number of small businesses selling low value products which have remained in business throughout the period is surprising.

There has throughout the period been a decline in convenience retailing in Shettleston with a net loss of 21 units or 22% of convenience units (Figure 9a). Scottish level; ABI data would have suggested that such a decline would be expected. This decline is steady across the eleven years. Of the various specialist retail categories two show a consistent decline over time – butchers and off licences (Figure 9b). Off licences showed the biggest decline, losing 7 units (a third of all convenience units closed) over the period. The relationship between the Tesco opening and closures of specialist food outlets is far from clear from Figures 9a and b, with trends probably already in place before the opening. Establishing a link between the decline in convenience units and the opening of Tesco is far from straightforward. These figures hide the churn in the system prior to the Tesco opening, with the closure of some convenience stores and the subsequent take up of units by new convenience store operators. Spatially there was a change in the street with convenience units, in particular the

butchers, at the western end of Shettleston Road furthest from Tesco being the ones to close. This was also an area where enhanced vacancy occurred. It would seem that Tesco resulted in a refocusing of Shettleston Road around the Tesco store and associated retailing (a micro locational concentration). This has been observed in other studies (Wrigley et al. 2010) but it is not true in all cases. Further from Tesco, on Tollcross Road, there was little change in the provision of convenience retail. The opening of the Tesco forecourt appears to cause the closure of two other forecourts, one in 2004 and one in 2005.

There has always been dispute about the time frame needed to assess impact. The data here suggests that there is a need to look at much longer term trends (including before opening) and to match these with national trends. In the case of butchers, there has been a steady decline in the number of butchers. Using ABI statistics as a guide it might have been anticipated from national data that in an area with 108 shops there would be 3 butchers. This suggests that perhaps there was a pre-existing oversupply of butchers. In a neglected area, where structural change has not occurred for a long period, it might be expected that system shocks on development will be extreme.

However Shettleston still has 7 butchers; several of which are longstanding and have been there for over 30 years. This suggests particular patterns of demand and thus resilience.

Comparison retailing on the other hand has maintained a fairly even number of outlets in the area though a dip does seem to occur, not after the opening of the Tesco store, but in 2009 (Figure 10). The area would appear to have been unaffected by the opening of the Glasgow Fort, probably given the already accessible Forge Shopping Centre and the accessibility of central Glasgow.

A key part of every commercial centre is the service sector (CB Richard Ellis, 2004). Tertiarisation has increased in Shettleston (Figure 11) from an already substantial base. In Shettleston the tertiarisation comprises hairdressers, tanning and beauty salons, takeaway hot food, repair outlets and health related activities. Valentine (1998) identified eating in the street as a change in the code of civility across the UK and thus the meaning of the high street. In 2011 in Shettleston there were

49 hot food takeaway shops, 6 sandwich shops, 7 cafes and 36 hairdressers. These are places to 'hang out' and meet people and in terms of 'sociality' they contribute much to the street. There are 16 public houses on the shopping streets in Shettleston. All these units are excluded from the analysis in ABI. Some 30 or so years ago it was a common sight on the streets of such areas in Glasgow to see women out in the street in their dressing gowns, curlers and bedroom slippers collecting a few items from a local convenience store or ctn. The street was to the local population of Shettleston an extension of their home representing an identity with the street which is more domestic than public, a contrast with other literatures on the street (Wrigley and Lowe, 2002). The carry outs today appear to be the equivalents.

DISCUSSION

Although ABI data would suggest a very significant level of retail decline in Shettleston in a decade, this was not matched by on the ground survey work focused on capturing nuances of stock, vacancy, churn and use. Shettleston is instead characterised by a significant change in the use of units, with a transition from retail to service uses. Exogenous change (the Tesco development) seemed to stem retail decline in the area, although at the same time it generated considerable upheaval, measured as churn, and resulted in a locational refocusing of the area. Perhaps, surprisingly, more recent recession has not touched the area in the ways that primary retail locations have experienced, possibly due to the more localised or subsistence type of retailing involved and the lack of exposure to the failure of multiple retailers.

There are different perspectives from which to interpret the changes observed in Shettleston. Economically the tertiarisation of the high street is clear. A more anthropological or cultural approach identifies tertiarisation as a new form of sociality, and a remaking of the place in terms of the way the street is used for social interaction. Tertiarisation maintains Shettleston as a local hub, offering opportunities for new forms of sociality. In planning terms the potential impact of new retail developments and their relationship to existing uses is vital. Given calls for changes to use classes to

manage town centres (Portas, 2011), caution may be advised to ensure that such changes do not destroy the essence of secondary retail locations (Bagwell, 2011).

Many of the changes observed resonate with trends noted by Wrigley and Dolega (2011). The data show that tertiarisation is not a response to recession, but is a long established trend. Shettleston and areas like it were not included in Wrigley and Dolega's (2011) analysis (Scotland was not included) and indeed the data for Shettleston would not fit their typology because vacancy rates actually fell between 2006-2007 and 2008-2009 from 12.3% to 9.9%. Wrigley and Dolega (2011) interpreted change in terms of adaptive resilience to the recession, by which they inferred that retailing would not revert to a previous pattern after the recession, but would accommodate change. Staying with the vulnerability and resilience framework we would prefer however to borrow a more macro environment idea framed on risk (Cordina, 2004). Risk is a function of exposure (vulnerability) minus coping ability (resilience), so that the greater the exposure the greater the required coping ability. Exposure is defined in terms of openness to exogenous shocks and coping ability is defined in terms of management of risk factors. In a retail or town centre context the openness spectrum would range from places with a low level of multiple retailers serving the needs of locally based customers for everyday goods to commodified centres dominated by international specialist retailers selling high end goods to customers from a very wide area. The coping ability required to service these very different types of centre are very different. The so-called 'Singapore paradox' that a highly exposed economy can mitigate exposure by policies that build great resilience, succeeding not because of but in spite of their exposure, demonstrates a more complex relationship between vulnerability and resilience. Matching exposure and resilience is key to place based strategies for town centres. In Shettleston arguably risk had been heightened in 2001 as it no longer adequately met local needs. The arrival of Tesco, through its micro-location and the particular size of store, reduced that risk, but did not at the same time increase its exposure. The centre has not been 'managed', adaptive behaviour has occurred, but exposure has been minimised by the localness of that behaviour; indeed Tesco through 'clawback' (i.e. the process by which potential customers

return to regular purchasing in a location after previously shopping in another location (Findlay and Sparks, 2008)) re-emphasised localness. Shettleston is not immune however to exogenous shocks and the challenges of recession are becoming evident.

CONCLUSIONS

'Other places' of retail have been ignored in favour of new malls and city centres for which there is more data available. Given the scale and local importance of secondary centres they should be a more central part of the wider study of retail change. We set out to achieve three research aims. We have identified the changes occurring in one such 'other place' and outlined the dimensions of change. In doing so, we have provided a new contribution in terms of methodology and data measurement. Secondly we sought to explain the changes identified and have done so in terms of exogenous change and long-run resilience and adaptation. Our contribution lies here in the development of measurement tools, their conceptual linking and in extending concepts of resilience. Thirdly we aimed to draw out implications and we point now to two:

- (a) It is only possible to understand change in an area if the data is longitudinal and systematic. There is an appetite for policy initiatives in retail places, but given the lack of research there is a real danger that we are unable to assess the effectiveness of these, nor to consider unintended consequences (Douglas Wheeler Associates et al, 2011). We need detailed systematic comparable data, with measures developed along common widely understood principles. Such data might additionally beneficially focus on local perceptions of changing places.
- (b) Areas such as the one studied here are not necessarily as problematic as perceived and provide ongoing functions. They may be different and adjust in different ways, but nonetheless they require understanding and assessment on their own terms.

This paper has argued that there is a need to remember that these 'other places' of retail matter not just as targets for regeneration projects or historicised 'pre-war seedy arteries' from the past, but as local functioning places. Trends in these places do not necessarily follow wider trends. Their capacity to accommodate change is different. Tertiarisation of secondary retail locations should be interpreted in terms of the way that it reinforces local high streets and town centres. People express multiple identities in their choice of type and location of shopping and local centres remain important, probably even more so for communities with lower spending power and more limited mobility.

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Figure 1 Data Sources and Measures

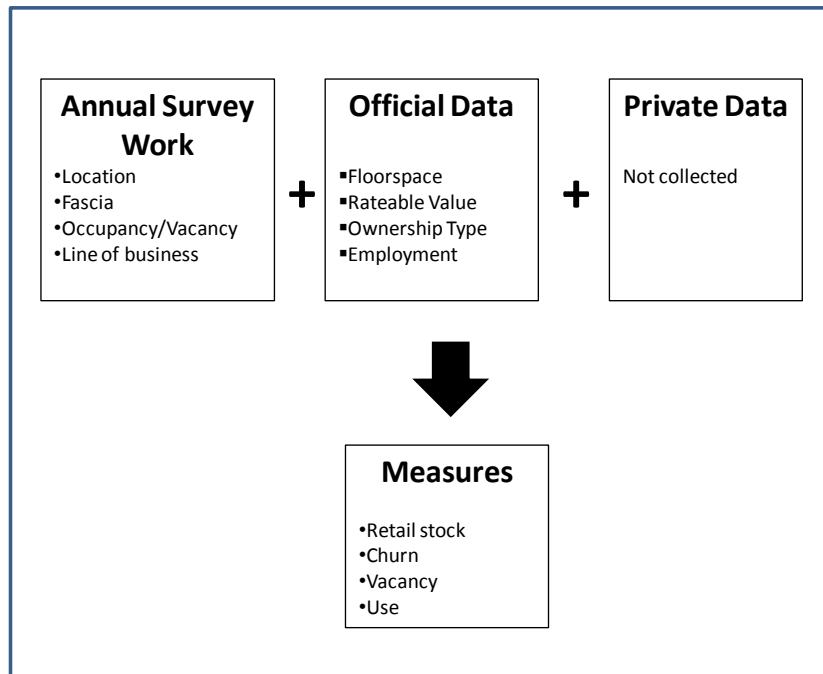
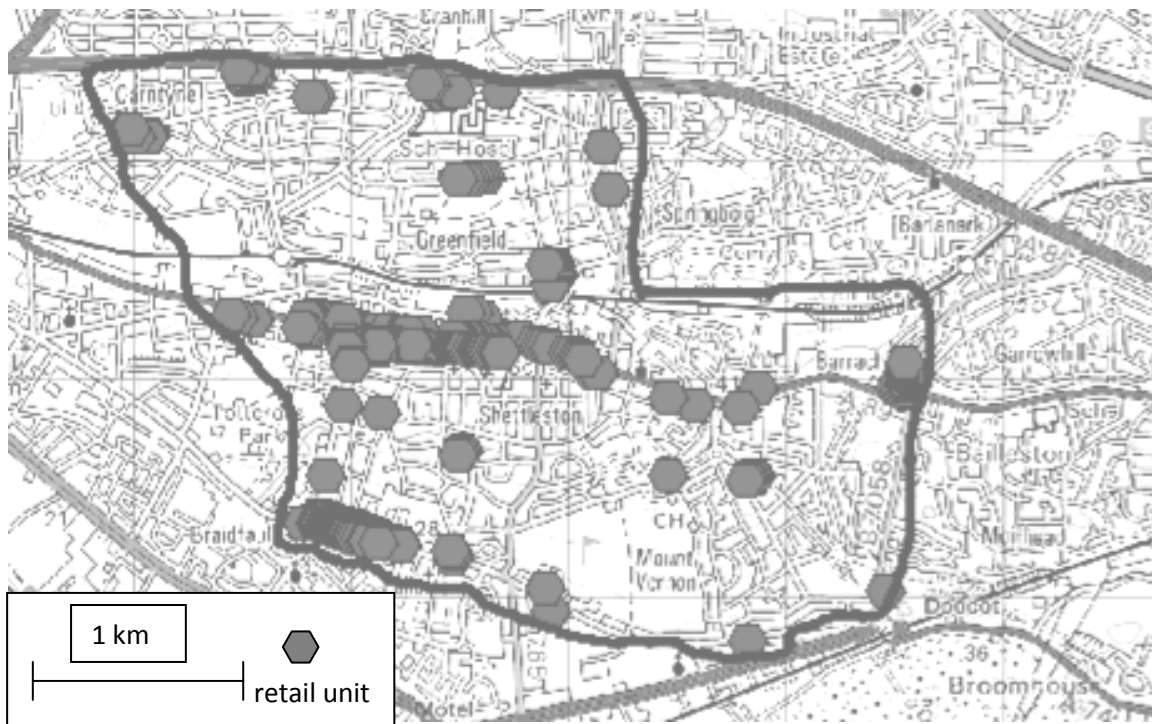


Figure 2 Map of Shettleson: Retail Units

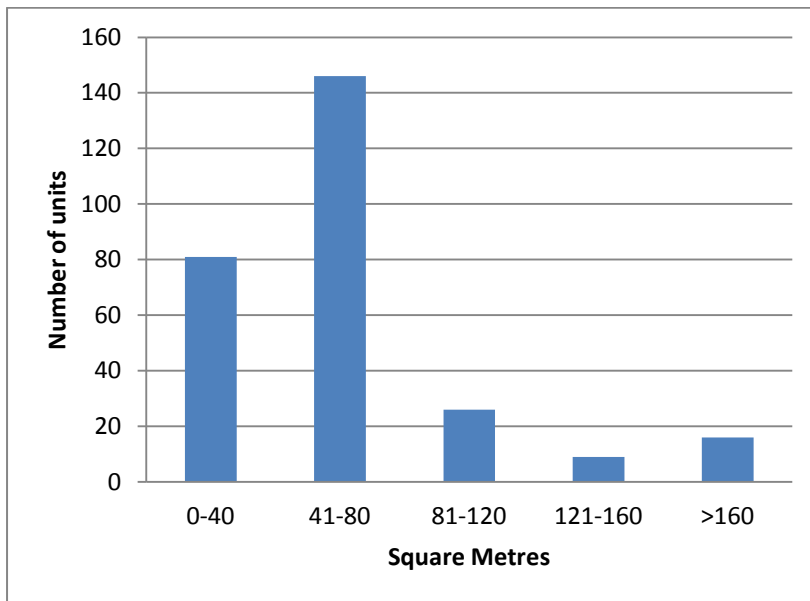


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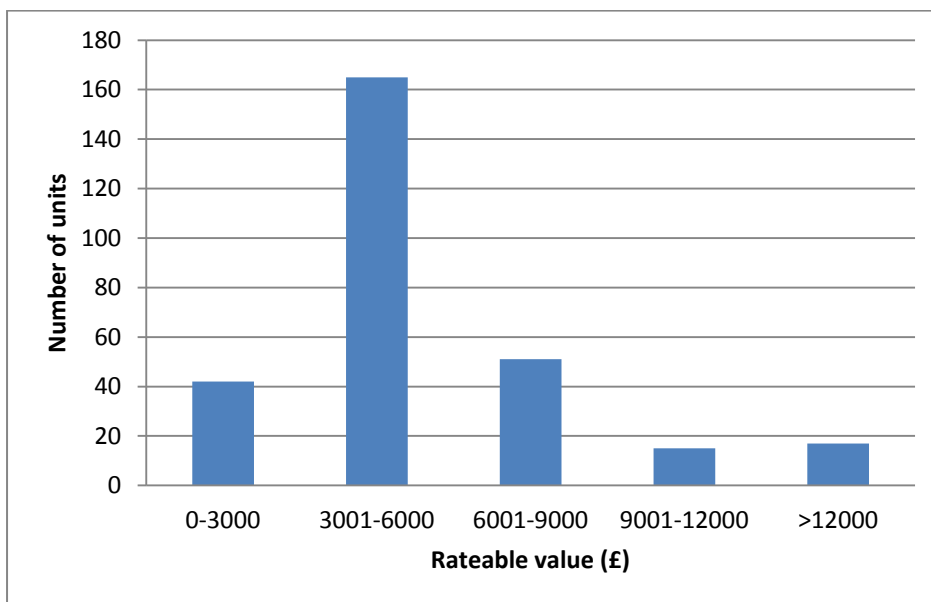
Figure 3. Photograph of Shettleston Road.

Figure 4 Retail units in Shettleston by size category (sq metres)



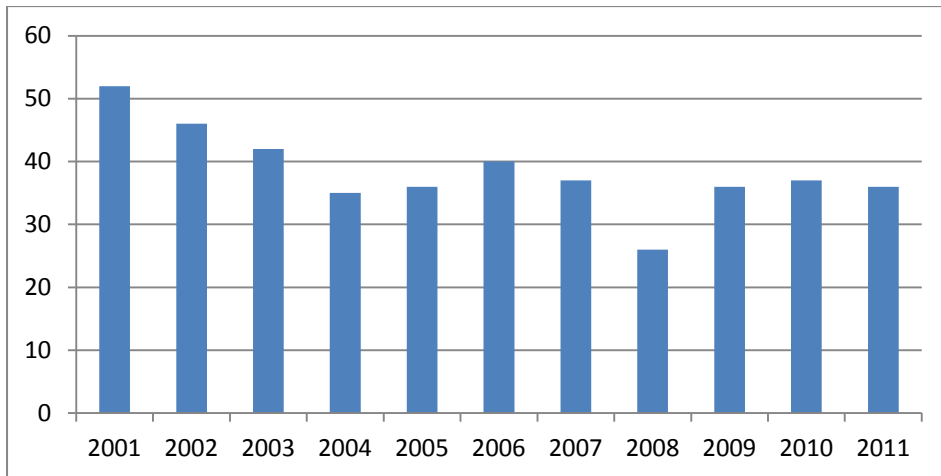
Source: Valuation Office Agency

Figure 5 Rateable Values of retail properties in Shettleston, 2010



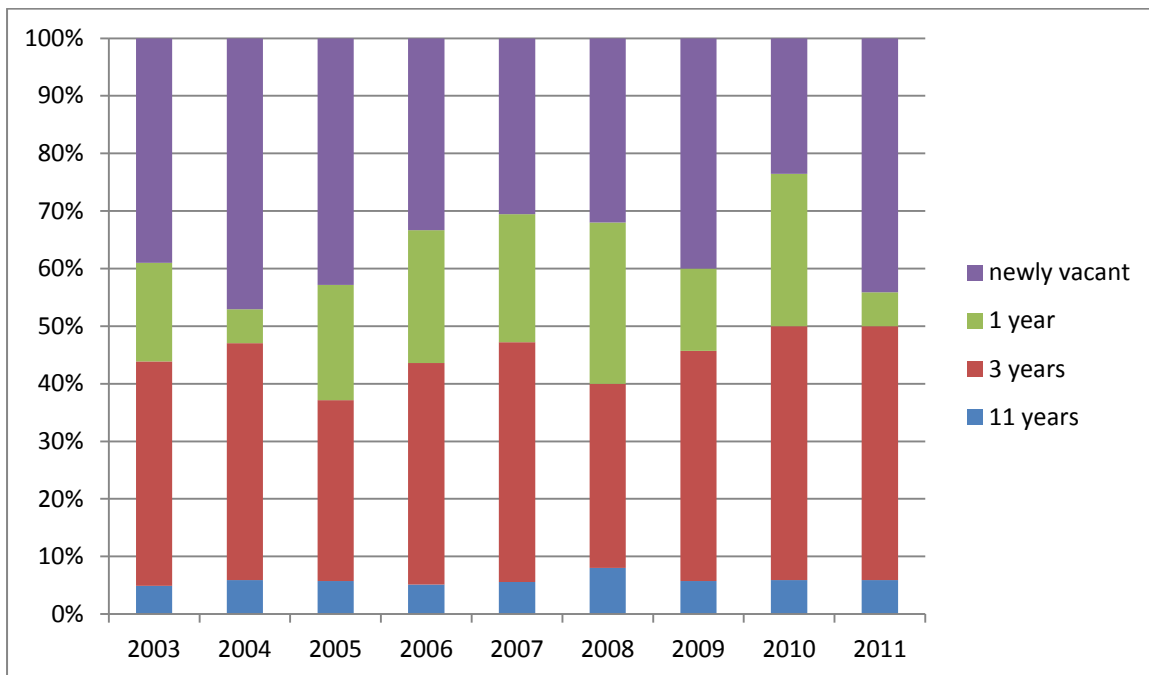
Source: Valuation Office Agency

Figure 6 Number of Vacant Retail Properties, Shettleston



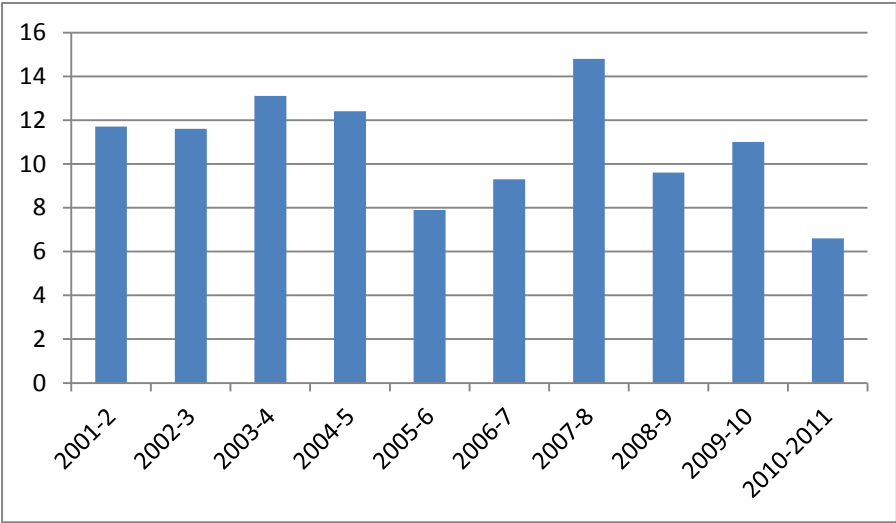
Source: Authors' Surveys

Figure 7 Complex retail vacancy, Shettleston



Source: Authors' Surveys

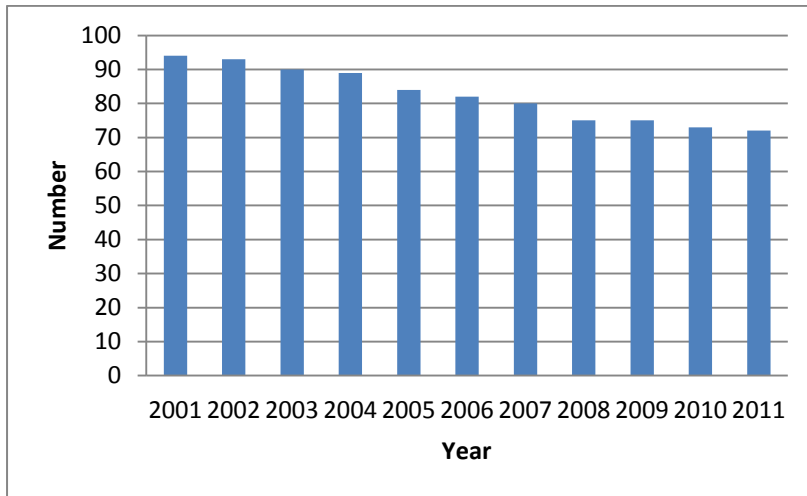
Figure 8 Level of Churn, Shettleston



Source: Authors' Surveys

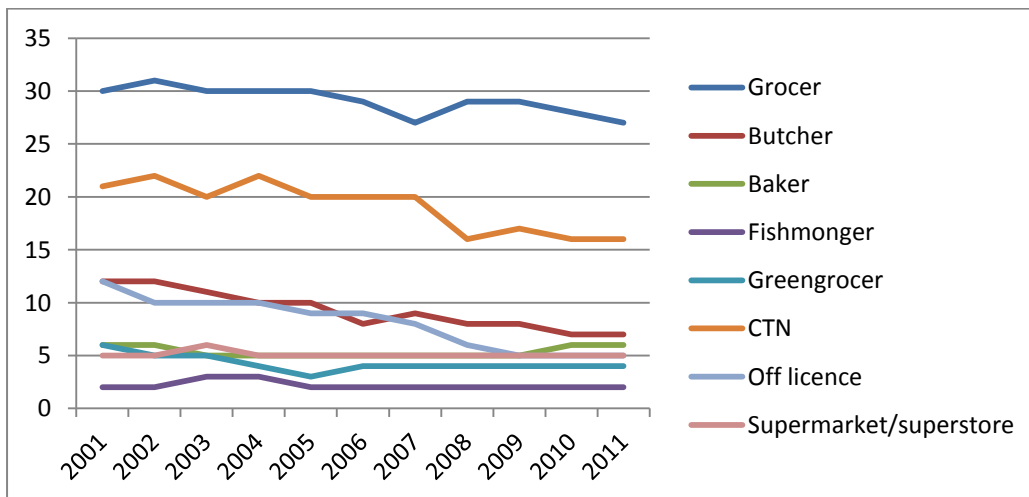
Figure 9 Convenience Retailers, Shettleston

a) Number of retailers



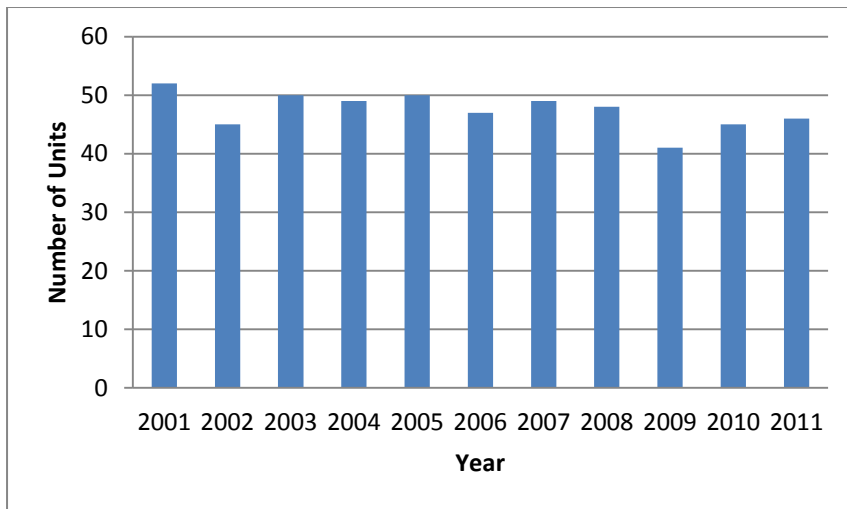
Source: Authors' Surveys

b) Type of goods



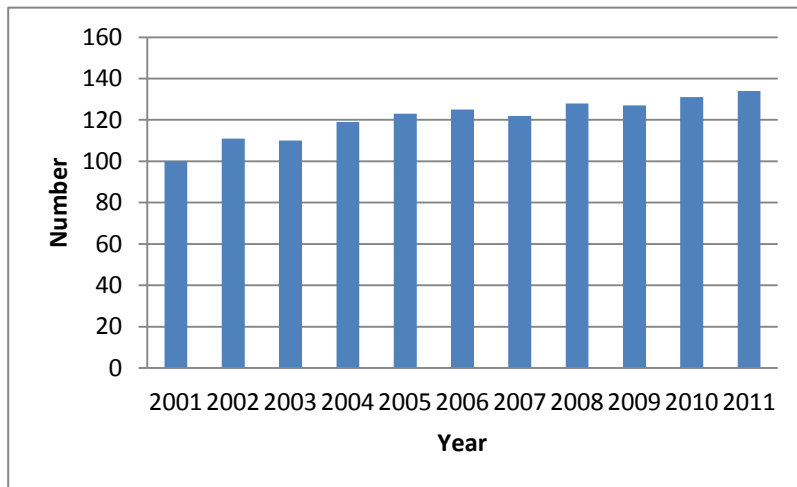
Source: Authors' Surveys

Figure 10 Comparison Retailers, Shettleston



Source: Authors' Surveys

Figure 11 Service Activities, Shettleston



Source: Authors' Surveys