

Additional factors that affect High Street performance: as identified by HSUK2020 partners

Cathy Parker, Nikos Ntounis and Simon Quin



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Foreword

In this document, you will find 50 factors you identified as influencing high street performance but missing from the list of 166 factors you reviewed at our last meeting.

Thank you very much for this additional information, it is very valuable and will help improve the quality of the forecasting model.

We have revisited the literature to see what research exists regarding each of the factors you identified. You will see in the discussion below references to articles by name(s) and date that provide relevant commentary. Further details on each of these articles are listed in the reference list at the back. Where we have found evidence in the literature for the factor it has been included in the next stage of forecasting model development (although it may be termed slightly differently). This next stage utilises the Delphi Technique, an established method to get consensus amongst experts. Top UK academics and experts in High Street performance have agreed to establish a hierarchy of order amongst the factors we have all identified impact on the High Street.

Where we have not found evidence in the literature we suggest this topic be included in the future research agenda that we are also developing as one of the outcomes of this project, as well as re-visited at the intervention stage of the project, when we investigate strategies for repositioning, reinventing, rebranding and restructuring the High Street. The 50 additional factors are discussed in alphabetical order.

We hope this helps shed some light on the factors you identified as impacting upon your High Street's vitality and viability. As always we welcome your feedback and suggestions.

Cathy Parker, Nikos Ntounis and Simon Quin

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c.parker@mmu.ac.uk

n.ntounis@mmu.ac.uk

simon@placemanagement.org

Our High Street UK 2020 Partners

Partner Locations

Alsager	June Buckley	projectsalsagerp@gmail.com
Altrincham	Hazel Kimmitt	hazel.kimmitt@trafford.gov.uk
Ballymena	Sean Trainor	sean.trainor@ballymena.gov.uk
	Sharon Scott	sharon@placesolutions.com
Barnsley	Anne Untisz	anneuntisz@barnsley.gov.uk
	John Orchard	john.orchard@urbeto.co.uk
Bristol (St George)	Jason Thorne	jason.thorne@bristol.gov.uk
Congleton	Jackie MacArthur	jm@congletontowncouncil.co.uk
Holmfirth	Margaret Dale	margdale@btinternet.com
	Andrew Jackson	andrew.jackson@kirkless.gov.uk
Market Rasen	Sadie Richardson	mrbigapprentice@gmail.com
	Sara Scott	sara.scott@brandthing.co.uk
Morley	Rachel Kennedy	morleyevents@live.co.uk
Wrexham	Angela Evans	angela.evans@wrexham.gov.uk
	Isobel Garner	isobel.garner@wrexham.gov.uk

Academic

Institute of Place Management	Simon Quin	simon@placemanagement.org
Manchester Metropolitan University	Cathy Parker	c.parker@mmu.ac.uk
	Lynn Martin	l.martin@mmu.ac.uk
	Donna Towe	d.towe@mmu.ac.uk
	Nikolaos-Foivos Ntounis	n.ntounis@mmu.ac.uk
Nottingham Trent University	Kim Cassidy	kim.cassidy@ntu.ac.uk
University of Dundee	Deborah Peel	d.peel@dundee.ac.uk
University of Manchester	John Pal	john.pal@mbs.ac.uk
University of Leicester	Mihalis Kavartzis	mk302@leicester.ac.uk
University of Oxford	Jonathan Reynolds	jonathan.reynolds@sbs.ox.ac.uk

Industry

Centre for Cities	Paul Swinney	p.swinney@centreforcities.org
Go Local	Simon Jose	info@golocalnorth.org
Local Creation	John Wonnacott	john.wonnacott@localcreation.co.uk
New River Retail	Paul Wright	pwright@nrr.co.uk
Retail Champion Wales	Phil Smith	phil@smithpersonal.co.uk
Springboard	Diane Wehrle	diane.wehrle@spring-board.info

Websites

Economic & Social Research Council	www.esrc.ac.uk
Institute of Place Management	www.placemanagement.org
Manchester Metropolitan University	www.business.mmu.ac.uk
Business School	
Centre for Retail, Place and Consumer Change	www.business.mmu.ac.uk/crpcc

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Factors

1. Ability to change

"Many large retailers in Britain have been highly adaptive to regulatory change, able to alter scale, format, location, and branding" (Hall, 2011). There is a lot in the literature about how adaptive retailers are to change, but less about how town centres etc. adapt to change. Whilst the symptoms of change may be studied (e.g. vacancy rates), the causes of change are less understood. "While rents represent demand and supply forces, they do not explain underlying economic fundamentals driving change" (Goetzmann & Wachter, 1995). So that suggests adapting to change is difficult if there is poor understanding of the factors underlying change. There is some literature on the ability of locations to change "retail change should mirror urban change" (Jones & Orr, 1999) but the term used is flexibility.

Ability to change is represented in the Delphi Technique as 'flexibility' after Roberts et al. (2010).

2. Baby change/Toilets

There are a few sporadic comments about the needs of families for baby rooms, baby-sitting services and diaper changing rooms on the high street or in shopping centres (Jones, 1990; Cohen, 1996; Reimers & Clulow, 2000), but these factors are either a part of a centre's infrastructural services/amenities or its overall convenience. Studies of these 'hygiene' factors conclude "car-parking, toilets, cash-dispensers or guides cannot compensate for a suboptimal tenant mix or atmosphere" (Teller, 2008).

The absence of decent quality public toilets and baby-change facilities has been suggested as making urban space unwelcoming to women (Greed, 1996). Children's perceptions of and concerns about town centres, including the facilities they offer, appearance, maintenance and potential threats were explored by Woolley and colleagues (Woolley, Dunn, Spencer, Short, & Rowley, 1999; Woolley, Spencer, Dunn, & Rowley, 1999). The need to encourage town centre visits by the elderly through provision of facilities (toilets, benches, lighting etc.) was researched by Gilroy (2008).

Toilets and baby-change facilities will be included in the Delphi.

3. Balance between types of outlet

We found 26 studies that investigated retail diversity. This measures the variety of comparison goods outlets. Many studies identify the importance of 'tenant mix' (e.g. Teller & Schnedlitz, 2012). We propose to use established terms such as diversity, mix and range of shops in the forecasting model to represent the balance between the type of shop. There is less in the literature about diversity across types of outlet (or balance between them) but lots of studies that investigate linked trips and other types of offer, such as leisure.

This represents 'monofunctional vs multifunctional' purpose and mixed-use and both terms are included in the Delphi Technique.

4. Barriers to entry and expansion

As far back as 1961 Jane Jacobs noted that "recent emphasis on entrepreneurs and innovation as sources of economic growth has led to the renewed recognition of city centers", thereby positioning centres as locations for entrepreneurship and innovation. However, the structure of many retail centres would seem to be barriers to entry for new entrants whilst also not supporting retail expansion. We deal with each of these in turn. We have found plenty of evidence that "landlords prefer multiples" Golisinski & West (1995). "Britain has a group of national durable multiples which dominate comparison shopping to an extent unmatched elsewhere" (Schiller, 1994). However, Wrigley & Dolega (2011) believe that policy proposals and instruments that aim to remove or reduce barriers are unlikely to be best achieved by attempting to reset town centres/high streets to their configurations before the partly regulatory-induced (town-centres-first) and partly consumer-lifestyle-induced (convenience culture and on-line e-retail) reconfigurations of the past decade.

The particular barrier to entry for new entrants is the difficulty with which they can rent retail floorspace in areas associated with the highest footfall. Clarke, Bennison, & Pal (1997) noted the difficulties associated with entering an already established area in terms of size and location. These spatial, and most times finite, structures act as barriers to further accumulation (Harvey, 1985) and affect the High Street's competitive strength and future strategic options. The lack of new entrants may be having a detrimental effect as "urban husbandry (place management) seeks to strengthen existing assets prior to adding new elements, typically by involving many entrepreneurs". (K. A. Robertson, 1999).

Barriers to entry will be included in the Delphi.

Moving on to expansion. Again we have evidence that the structure of existing locations can act as a barrier to expansion. "Location strategies of multiples have shifted the retail center of gravity away from the High Street" (Karamychev & van Reeve, 2009). However, there is evidence of expansion of specific sectors on the High Street, e.g. convenience stores and independent stores; Local Data Company's Openings and Closures 2013 report has covered the rise of independents on the High Street (over 2000 stores) and the exiting of multiples towards out-of-town retail parks and agglomerations. The convenience sector has also expanded its presence on the High Street, and whilst there has been criticism of the dominance of multiples in this sector, a relatively old Competition Commission report that concluded that it could "not find any significant distortions in competition between large grocery retailers and convenience store operators. "As a result, it did "not consider that the expansion into convenience store retailing by large grocery retailers such as Sainsbury's and Tesco is having an adverse effect on competition" (Competition Commission, 2007, p. 14). Wrigley et al. (2009) suggested that the opening of a big supermarket in the city centre can generate urban buzz (Storper & Venables, 2004) and positive spill over effects to the High Street as a result of 'linked trip' behaviour. However, they found it can also accelerate the exit of small stores from isolated/peripheral elements. A 'non causal linkage' between growth of population and household income in the catchment area and supermarket entrance and increased trade is supported by Experian/Goad and highlighted in Wrigley et al.'s (2009) work. Significant increases in the number of small stores can be seen in town centres/high streets with a more slowly growing catchment which was simultaneously experiencing population-composition change in terms of increasing ethnic diversity. For example, increases in independent convenience stores are linked to catchment-area expansion of Central/Eastern European, Asian, and other groups; what Guy (2008) refers to as the 'Polish grocer' effect. In conclusion, Wrigley and Dolega (2011) proved that higher floorspace occupancy by key/'magnet' retailers on the High Street does not affect expansion, and also increases resilience. In addition, we will be investigating the role of management in reducing barriers to entry and expansion. Business improvement districts are engaged in various business retention, expansion and attraction efforts (Gross, 2005).

The Delphi Technique includes the specific barriers to expansion we find evidence of, such as planning.

5. Business rates

There is an ongoing talk about the re-evaluation of business rates, and several high profile reports (e.g. the Grimsey Review 2013) call for drastic measures in the business rates system before it is too late for the high street. The University of Liverpool and Local Data Company are investigating factors that affect business rates (occupation, vacancy rates and rents) and their preliminary analysis highlighted the disproportions in rents, vacancy rates and business rates. De Magalhaes's (2012) work highlights the relationship between BIDs and business rates; De Magalhaes claims that BIDs exist as a way of generating a small amount of surtax on business rates, which can be re-invested locally according to priorities set by the BIDs' members. He also highlights the problem with redistribution of business rates to local authorities, which has nothing to do with the place's priorities. The CLG (2011) report also presents a government plan that will allow local authorities to retain a part of the income generated by business rates to reinvest in their own economic development priorities. Secondary shopping areas seem to suffer the most from the business rates system, and this was recognised in a scoping paper by Tym et al. (2000) who called for business rates revisions in these areas. Also, Findlay & Sparks (2009) raised their concerns on business rates and argued if they are well matched with buying power of users and types of retailer.

Business rates will be included in the Delphi Technique.

6. Business support

The shopping centre management, town centre management and place management literature argues that management can and should involve business support interventions, such as training and advice. Place management, centre management and town centre management are included in the Delphi Technique. Nevertheless, we appreciate that the existence of these structures does not guarantee business support, therefore this is an area for further research.

7. Collaboration

Sweeting (2002) notes that "local leaders have to play the roles of entrepreneur and facilitator; generating consensus/collaboration" but there is little evidence to link collaboration between stakeholders and retail centre performance, although this premise is central to much of the town centre and place management literature.

Collaboration will be included in the Delphi Technique.

8. Communication

As part of a town's/city's marketing communications, communication strategies need to highlight retail change and need to encourage customers to change their shopping habits in a way that will sustain such change (M. H. Kirkup & Rafiq, 1999; Warnaby, Bennison, & Davies, 2005). Communication between traders is poor. A study by Parker et al (2005) showed that only 40% of SME traders were in any sort of network to receive information about their sector or location. See collaboration, engagement and networks.

Communication practices are included in the Delphi Technique.

9. Connectivity

We have evidence that connectivity impacts on retail centre performance. "1% increase in connectivity with the neighbourhood in which the shop is located commands a 17% premium in unit rent prices" (Nase, Berry, & Adair, 2013).

Therefore, connectivity is included in the Delphi.

10. Cultural facilities, culture and cultural policies

Again, there is evidence of the positive impact of culture. For example, Lea, Jones, & Bylov (2003) see downtown health is a factor of public transit/access/parking, residents, workforce, retail and services, culture, tourism, cleanliness and an absence of crime.

Culture is included in the Delphi technique.

11. Customer service and response

Whilst there are lots of articles on customer service and performance at the level of the individual retailer there is less at the level of the location. We found evidence that "the level of satisfaction with the global service offered by a mall plays an important role in the consumer's behaviour" (Léo & Philippe, 2002). For planned shopping centres, customer service is a big part of the centre's post-opening operations (Warnaby, Bennison and Davies, 2005) and this is measured as part of centre image. There is also evidence that the level of service quality provided by centre management is the most powerful way of enhancing brand attitudes (Roberts, Merrilees, Herington, & Miller, 2010).

'Service quality' and 'centre image' are used in the Delphi.

12. Disposable income

The relationship between catchment income and performance is well established. There is a correlation between a population's income and retail sales at total (Ferber, 1958) and per capita levels (Liu, 1970). We use the dominant term 'income'.

Income is included in the Delphi.

13. Diversity of use

See 'Balance between type of outlet' and 'mixed use'.

14. Engagement and engaged businesses

Engagement is recognised as factor in the literature, in terms of businesses engagement in place management partnerships and/or place-decision making. Important to the small town response to change is the quality of local governance and if they are "partnership rich" (Edwards, Goodwin and Woods, 2003).

Small businesses are embedded in the community and have a greater investment in the well-being of local residents and this provides an entrepreneurial culture that provides the capacity for a community to self-develop (Blanchard, Tolbert, & Mencken, 2011a). Community participation in local problem solving is more evident where there is a small business environment (Blanchard & Matthews, 2006).

The coming together of community members to work collectively can promote community and individual health (Glaeser, Laibson, & Sacerdote, 2002) and even happiness (Islam, Merlo, Kawachi, Lindström, & Gerdtham, 2006). Termed "collective efficacy" (Domínguez & Arford, 2010; Blanchard et al 2012) such an approach can promote walkability and community safety (D. A. Cohen, Finch, Bower, & Sastry, 2006). Citizens should have the right to change the city (Harvey, 2003) as well as a right to the city.

Therefore we will investigate engagement in the Delphi as well as partnership, governance, communication and networking.

15. E-tailing

E-tailing is investigated in the literature, both through the impact of the internet, and the availability of alternative channels. For example, Kirkup & Rafiq (1994) note 'it is not as easy to find retail tenants as it used to be', blaming competition, recession and types of retailing.

E-tail is included in the Delphi.

16. Finance and other resources to change

Stubbs, Warnaby, & Medway (2002) proposed that a towns' ability to implement effective strategic analysis was hampered by a lack of time and finances. Robertson (1999) comments that empty streets and vacant buildings stand as reminders of decades of disinvestment and shift of people and capital to the suburbs. Reynolds & Schiller (1992) note retail investment in central area comparison goods has been concentrated in metropolitan/major regional centres. The main term in the literature that 'captures' investment is regeneration.

Therefore, regeneration is the factor that is included in the Delphi Technique.

17. Fragmentation in town centres and measures to mitigate them

The literature concludes that retail fragmentation is inevitable; but its extent/form must consider the public interest (urban liveability) not just business interests. Fragmentation is often studied over larger areas e.g. "fragmentation of retail centers exists with a tunnel effect of road infrastructure to traverse non-valued areas" (Graham & Marvin, 2001). The upshot of which "results in large travel distance for shopping purposes and greater automobile dependence" (Rotem-Mindali, 2012). Fragmentation within centres was also part of Hart et al.'s (2014) research, and LDC's heat maps were used to highlight hot-spots and cold-spots in a 4-week period. There are two very distinct clusters of high activity. Linking these with sector-related data shows the highest frequency of shopping in fashion outlets (Primark, Next and New Look) and other multiples (Argos, Boots and Wilkinsons). Few customers venture to a retail park on the edge of town during a town centre trip. Analysis also shows that clusters of vacant units are reflected by areas of low customer activity. There is a need to maximise the customer's town centre activity, as visitors to town centres need reasons to divert from their habitual shopping routes which they use to predominantly visit the multiple stores in primary shopping areas. Customers are often pleasantly surprised by what they find if they stray from their regular pattern and appreciate the independent stores and different atmosphere provided by secondary streets. Therefore, the merchandising techniques that retailers use to stimulate customer circula-

tion should be employed on a town-wide basis to attract shoppers to quieter areas and turn retail cold-spots into hot-spots. This can be done with the hosting of special mini-events, better signage, better communication and advertising (Hart et al., 2014).

Fragmentation will be included in the Delphi.

18. Health

We could not find anything in the published literature relating the health of the catchment to High Street performance, although car ownership and usage is a common denominator in the decline of both. Kärholm, Nylund, & Prieto de la Fuente (2014) say “managing retail transformation in a sustainable manner is becoming increasingly urgent if we don't want to be car-dependent”. Quite a lot of work has investigated ‘food deserts’ and the absence of access to fresh food to the non-car owning population, and links to other concepts such as social exclusion. There is a strong correlation between health and income, but health is obviously a key component of quality of life – so please see discussion under that section too. The provision of health care facilities in town centres is also covered under diversity of use, mixed use, linked trips and integration of public services.

Healthcare is included in the Delphi technique.

19. Heritage/Leisure/Tourism

Town centres, high streets and downtowns are often the centre for tourism and heritage (Hernandez & Jones, 2005). Howard (2007) investigated Shopping 'leisure', identifying three important factors. 1. Ambient (seating, eating etc). 2. Magnet (cinema, event). 3. Heritage (tourism). However, genuine heritage is often commodified by urban designers and can lose authenticity through conservation work. Historic environments are not merely appreciated for their quality, future value use and distinctive character (Biddulph, 2011). To manage the town centre experience effectively, the combination of attractions that achieve most synergy for that location need to be identified. The character and tradition of a town centre may be valued more highly than concerns for central parking. Researching consumers' ‘touch points’ for a town centre could generate new opportunities for shoppers to celebrate the local heritage of specific streets or buildings, for instance, by creating a ‘heritage’ access route from outlying car parks with supporting signage, seating, and historical information points (Hart, Stachow, & Cadogan, 2013). Also, place management models implemented by local retailers, people and town centre managers can merge heritage-led local identity, social cohesion and local retail (Coca-Stefaniak, Parker, Quin, Rinaldi, & Byrom, 2009). Regarding tourism and heritage, there is evidence that many towns, despite being not being labelled as visitor attractions, have some scope for developing a tourist function, usually related to the towns' heritage (Powe & Hart, 2008).

Findlay and Sparks (2009) treat tourism as an optional city specific indicator (along with evening economy), and a 1992 BDP/OXIRM planning authority survey found out that authorities believe that seasonality and impact of tourism is an important indicator of viability and vitality on a town centre. Tourism seems to be an important factor of retail restructuring in areas; Vias (2004) highlighted that between 1988 and 1999, many rural towns in America shifted away from extractive economies to service industries (recreation & tourism). Shopping is considered as one of the most popular leisure activities and has an effect on tourism as well, with tourists/visitors spending 24% of their money on food, 19% on clothing, and 11% on a souvenir when on a tourism day trip (Robertson & Fennell, 2007). Regional Shopping Centres are often part of tourism campaigns and are the most likely a reason to visit a city. Leisure, tourism and heritage are factors that affect the town centre's health check (Peel, 2003) and must be communicated via marketing, promotional and branding activities (Kavaratzis, 2004) in order to enhance the High Street's profile.

Tourism, heritage and leisure are all included in the Delphi.

20. Inertia in terms of mindsets and people

‘Planning’ is the main arena in which town-centre decision making has been studied. The literature is often quite critical of local retail planning, saying that the response of Local Authorities has often been to prevaricate in the face of major applications and that when decisions are eventually made, they can often be inadequate. However, Larkham & Pompa (1989) note that local planning authorities dealing with major retail proposals do so under severe financial & time constraints. Town centre decision making is an under-researched area, and it is one the research objectives of the HSUK2020 project to understand more about it. Therefore, we hope

our partner towns will allow us to study how decisions are made in their local areas, so we can add this knowledge to the academic literature. All data supplied will, of course, be anonymised, so the identity of the location or respondent will not be identifiable.

21. Information

The literature makes quite a lot of reference to the availability of information but the lack of application in locations. Failing to understand quantitative market information may lead communities into what Milder (2005) calls the "decorated coffin" trap. Information and decision-making are linked, for example, Larkham and Pompa (1989) in their analysis of planning decisions note "it is extremely difficult to prove adverse effects on the town centre, given the minimal information in an outline planning application". The type of information towns access and how this information is used will be researched within the HSUK2020 project.

Information availability and information use are both included in the Delphi.

22. Internet connectivity

Surprisingly enough, internet availability on the High Street is not considered a factor of High Street performance. This might be due to the continuous rise of Smartphone users, who normally have an available data plan. An Experian study (2012) highlighted the following statistics that have potential significance for the High Street:

- 73% of connected smart phone users use their phone while shopping
- 45% of mobile users in the UK aged 16 and above use a smartphone
- 69% of smartphone users regularly surf the internet
- 71% of smartphone users search to find information about goods and services after seeing an advert
- m-commerce is expected to rise to 7% by 2016.

The Internet has become a serious threat for retailers on the High Street, as the numbers of online shoppers and those who engage in "showrooming" are constantly increasing (Hart et al., 2014). Frequent e-shoppers were most likely to change their purchase behaviour at city centre stores as a result of e-shopping. Thus, the more people buy online the fewer purchases they make at city centre stores. The negative impact of online buying on city centre purchases, however, depends on the retail category (Kwan et al., 2007). Retailers who sell CDs, videos, and DVDs, books, travel, hardware, and software have seen a catastrophic impact of online buying on their sales. However, frequent online searchers tend to make more shopping trips than infrequent online searchers (Kwan et al., 2007). This finding was not expected, since it is assumed that online searching would facilitate reaching a purchase decision, which would result in fewer shopping trips. Perhaps people use the internet to help them decide which products to choose, but still shop in-store to have a look at the product before buying it either online or in-store. People who shop often in-store also buy often online. The results suggest that, probably, these people buy at least as often in-store as online rather than using in-store shopping as a means to orient themselves to products they ultimately purchase online. It seems that individuals who like to shop will do so in various ways, using different shopping modes. No direct effect of online searching on online buying was found, although there is an indirect effect via in-store shopping: people who often make shopping trips (such as frequent online searchers), also often shop via different channels as a case of generation rather than substitution.

What does this mean for the High Street? M-commerce offers opportunities for innovation on the high street. As such, engagement with this technology may afford an important means to boost the vitality of our town centres (Experian, 2012). The Grimsey Review already highlighted the need for a networked High Street based on broadband and 4G technology:

"We can find a path with new technologies to create the best combination of both physical and virtual shopping through the hybrid high street. This considers the need for convenience and value, but also for the social aspect of face-to-face communing. One approach is to focus on offering a framework that retail, services and town planners alike can use to develop flexibility and rapid response ammunition to adapt to whatever the next wave of changes are coming to the high street." (Grimsey, 2013, pg. 17). Integration of broadband technologies means that an increase in the number of mutual connections between the nodes or network participants (retail, services, local government, job centres and all others) can be achieved in the High Street. The more mutual

connections, the more adaptive the high street network becomes in response to changes in the success of individual shops and services (Grimsey, 2013). In this respect, town centres can become virtual marketplaces so that customers have the latest information regarding the availability of stores, products, brands, services and events. A central, one-stop town centre website would ensure that the internet supports rather than supplants the town centre experience, but it must be well publicised and optimised for easy use (Hart et al., 2013, 2014).

Integration of the virtual and physical marketplace is an underdeveloped area and there is no knowledge of success in high street performance due to WiFi availability in the city centre. Free WiFi and networking opportunities that arise from this investment could signal a step towards becoming a smart city, such as Santander in Spain, which uses sensors connected to fibre networks to record data about the city and its surroundings. It then allows citizens the use of applications to allow them to process the information how they see fit (McDonald, 2013).

Internet connectivity will not be included in the Delphi Technique as we have no evidence for its effect. We do think it is an important area for further research.

23. Investment and Finance

See 'Finance and other resources to change'.

24. Knowledge in local people, decision makers, businesses

There is clearly a realisation in the literature that whilst there is knowledge, it is not always reaching the right people. For example, Hall (2011) asks "how do we recognise local forms of knowledge and resource networks that emerge outside of less culturally dominant value systems?" And also notes that "markets surveys, land-value analyses, market data & legal expertise reflect knowledge/power only available to large retail firms". Raye (1989) suggests that many centres have been designed by developers and their architects without the benefit of advice from knowledgeable management.

What we do not have is evidence of local knowledge making better high streets, and this is one of the issues we will research in this project, when we follow up the impact of the project on the 10 town centres involved.

25. Leadership

The Nolan Committee identified the 7 key principles of public life. Selflessness, integrity, objectivity, accountability, openness, honesty and leadership. Tony Blair (1998) said "local management represents the future of urban leadership where recognised leaders fulfil the community leadership role". Collaborative learning and associational working have been identified as important factors in comprehensive place leadership (Gibney, Copeland, & Murie, 2009). The qualities and difficulties of leadership in producing in creative cities is discussed by Landry (2000) (pages 108-110). It has also been noted that "...effective leadership is one of the factors that explains how and why some localities are able to adapt to and exploit the opportunities afforded... by the modern world – and may also partly explain why some places are better able to minimise the disruption that change brings" (Collinge, Gibney, & Mabey, 2010).

Leadership will be included in the Delphi Technique.

26. Liveability

There has been evidence that successful places are those that fine-tune their trajectories, urban policies and investment priorities in order to maintain and expand their assets, be they physical, social, cultural or of any other nature. In downtown areas, this involves historic preservation, truly convivial public spaces, good walkability, public transportation, properly managed parking, and an urban environment that is attuned to the needs of its users (Balsas, 2014). Downtown revitalization professionals are familiar with the changes in the environment and the population and are encouraged to nurture all the city residents and business owners, in order to enhance the long-term liveability of downtowns and their adjacent neighbourhoods.

Researchers from Australia identified more than 100 indicators that are associated with health and well-being and enhance a place's liveability (Whitzman et al., 2012). They categorised them in broad policy areas:

- Education

- Crime and Safety
- Employment and Income
- Entertainment, Leisure and Recreation
- Food and Shops
- Healthcare and Social Services
- Housing
- Natural Environment
- Public Open Space
- Social Cohesion and Community Engagement
- Transport

Balsas (2004) compared North American and European KPIs, including population demographics, employment; retail vacancy, performance and sales; car parking; footfall; crime safety; cleanliness, tourism and evening economy, and concluded that no standard way of measuring liveability exists yet, and that town centre liveability indicators should provide the principal qualitative and quantitative data input of the health check. It is advisable that a phased approach is adopted. It is important to start with a collectively agreed set of core indicators that can be built upon year after year. KPIs allow planners to monitor progress in achieving a liveable city centre.

Liveability will be included in the Delphi.

27. Location of employers

The literature notes the changing spatial patterns of employment. "Employment decentralized between the 1970s and 2000s and a growing share of jobs located away from CBDs" (Kures & Ryan, 2012). Researchers (e.g. Powe and Hart, 2008) have identified employment as a function for towns – and its impact on town centre performance, and there is evidence from Canada (city of Kitchener) that the Number of Employees working downtown is considered a viability and vitality indicator under the visitors category (Balsas, 2004; Findlay and Sparks, 2009). People who work in the city centre can offer a steady stream of income for retailers on the High Street (Teller & Elms, 2010) and the High Street needs to accommodate them as they are daily place users (Shaw & Williams, 1992). Some authors explicitly associate New Urbanism with facets of neo-liberal gentrification, such as the revanchist city (Smith, 1996) and the luring of homeowners and employers back from the suburbs in order to keep taxes low and cities safe, thus improving the business climate (Kenny & Zimmerman, 2004). However, high rents or high employment density can have adverse effects on the High Street (Whitehead, Simmonds, & Preston, 2006).

Location of employers will be included in the Delphi.

28. Measuring economic impact/value

Measuring economic impact and value is researched under 'regeneration'. For example, Hemphill et al, 2004 identify five regeneration KPIs: economy and work; resource use; buildings and land use; transport and mobility and community benefits. There is a view that regeneration should correct the adverse impact of market forces within deprived urban areas and stimulate urban land and property markets (economic impact/value). However, how much measurement actually takes place is doubtful. Much of the supporting evidence (for the success of regeneration) is narrowly focused, subjective or anecdotal (UK Parliament, 2003). Whether towns that measure economic impact/value do better is unknown. What is better? Peel (2003) argues that "the conceptualisation of town centre success in TCM is too narrow - focused on economic indicators not social vitality/justice." There is quite a lot of discussion of the use of KPIs in TCM, but no evidence as to whether it improves performance.

The use of performance indicators will be included in the Delphi.

29. Media coverage

In his study of Cardiff, Selby (2004) found an association between negative images of Cardiff and representations in the mass media.

The literature on place branding studies the 'gap' between reputation and reality, and it is an area we will be covering when we get to the interventions stage of the project.

We will include media coverage in the Delphi.

30. Mixed use

Hall (2011) defined an urban high street as a linear aggregation of mixed uses and mixed users. See discussion under 'balance of outlet'. In recent years, there has been a return to urban settings along main streets and the total recreation of complete urban districts in suburban, often affluent, neighbourhoods (Padilla & Eastlick, 2009; Pryor & Grossbart, 2005). These mixed-use developments include not only retail, but also offices and even housing. They are called lifestyle centres and they are intended to recreate walkable open-air shopping environments (Balsas, 2008; Greco, 2009).

Rogers (1987) identified that the retail component of mixed-use developments in the US has much in common with city centre shopping schemes in Britain and, in fact, they represent an attempt to re-create the rich blend of synergistic activities found in many city centres throughout Europe. Drawing on the work of Findlay and Sparks (2010), Wrigley and Dolega (2011) stated that the differential changes in retail/service-unit vacancy rates experienced across UK town centres and high streets as a result of the macroeconomic shock of global economic crisis, can be viewed as a product of filtering that shock through the existing economic structures of the town centres/high streets themselves. That is to say, through their pre-existing mix of businesses, the relationships and interdependencies between those businesses, and through local institutional structures supportive or less supportive of their business-practice environments and entrepreneurial cultures. Additionally via the way that process is translated into wider retail and property industry assessment of the likely trajectories of growth of the town centres/high streets. There are numerous cases of unsuccessful mixed-use developments though. In the case of Tempe (US), Conrad (2008, pp. 274–276) has argued that the Tempe system of mixed-use developments exhibits low resiliency because it was not based on organic growth, it did not increase mixed-income opportunities, nor did it contribute much to neighbourhood completeness, scoring points mainly in terms of its pedestrian and transit orientation. Mixed-use city centres have to base these developments in the centre's organic and authentic characteristics (Warnaby, 2009) and not try imitating 100% the mixed-use nature of the shopping mall or retail park (Reimers, 2013).

A mixture of uses has economic benefits and ultimately maintains the image of the downtown as the centre of the community. Furthermore, there is evidence that downtown business districts can also benefit from joint marketing and central retail management (CRM) efforts such as those often practiced by shopping centres with a common owner (Padilla & Eastlick, 2009; Page & Hardyman, 1996; Warnaby, Bennison, Davies, & Hughes, 2004). In other words, downtowns may experience positive returns from operating somewhat like suburban shopping centres, but within a unique, mixed-use environment. A broad mixed-use approach also requires additional expertise and knowledge of commercial market evaluation and broader economic development strategies. A comprehensive approach to market analysis may also necessitate the involvement of a large number of downtown stakeholders, perhaps with competing ideas and goals. Consequently, the current blend of downtown economic revitalization strategies complicates the market analysis process, especially for organizations with minimal expertise, capacity and funding (Kures & Ryan, 2012).

Mixed-use is included in our Delphi Technique – as well as linked shopping trips and multifunctional versus monofunctional offer.

31. Networking

Hall, 2011 asked "how do we recognise local forms of knowledge and resource networks that emerge outside of less culturally dominant value systems?". This is a real challenge. How much does informal activity that is not measured (or funded) impact on high street performance? A community's social capital and established networks are perceived to be important resources (Kures and Ryan, 2012).

Networking will be included in the Delphi.

32. Neutral space/public space

Jackson (1996) notes "shopping centers have substantively compromised democratic public space". In addition, Steel and Symes (2005) concluded in their work that BIDs and other development groups, though often successful in regenerating and improving city cen-

tres, privatise public spaces and leave no room for local governments and people to act. Whereas, friendliness, public spaces and architecture are major components of satisfaction with a shopping place (Léo & Philippe, 2002). Consumers' image of town centres is shaped by the physical appearance represented by the public space in terms of buildings and landmarks, community artworks, and historical associations (Gentile, Spiller, & Noci, 2007; Runyan & Huddleston, 2006). While the assortment dimension represents increasingly homogenised stores and high streets (Dawson, 2002), character or tradition potentially distinguish one town centre from another and enhances the consumer experience (Hart et al., 2013). Issues of standardisation and placelessness (Relph, 1976) from redeveloped public spaces have been noted (Biddulph, 2011), so careful planning is probably needed in order for public spaces to become a competitive advantage of the High Street.

Different perceptions of public space usage are expressed by Watson (2009). In her study of eight markets across the UK, she highlights not only the highly varied forms of social interaction in marketplaces, but also the mediation of differences across class and ethnicity, because of the amalgamations of work, convenience, and leisure that allow for an ordinary but expansive sense of public space, which supports the idea of a multi-cultural High Street with varied public spaces.

We include public space in the Delphi Technique.

33. Night-time economy or Evening economy

We have used night-time and evening economy synonymously in our review, as both terms seem to have the same meaning for researchers. Biddulph (2011) argues that night-time economy offers an alternative city centre market to the inner neighbourhoods or suburban offer. In Liverpool for example, the development of the night-time economy in areas like Ropewalks, although attracting and serving some overnight or weekend visitors, would appear to be targeted mainly at the local population. Perhaps that is why Night-time/Evening Economy is also used as an optional specific indicator for town centres. Jones, Hillier, and Comfort (2004) noted that, whilst many modern pubs / bars and fast food outlets are specifically aimed at evening trade – and prolonging the opening hours of the town centre – they offer little to daytime vitality and indeed, in some cases, can lead to anti-social behavioural problems which can often damage the image and perception of a town centre rather than enhance it. Jones et al (2004) focus on the specific problems facing small and medium size towns in the face of increased competition from out of town and edge of centre retail developments, as well as from larger towns higher up the retail hierarchy. There are social dis-benefits of the growth of city night life, (Jones, Hillier, and Turner, 1999), and frequently night-time entertainment on the High Street exhibits dislike and negativity, mainly from local people.

Evening economy is included in the Delphi.

34. Opening hours/availability

In their analysis of 25 shopping centres vs 14 shopping streets, Reimers and Clulow (2009) found that ALL malls satisfied ALL criteria for extended trading hours - compared to only 2 of the 14 streets. Obviously, being open and available is fundamental to performance. Longer opening hours and pleasant environment in newer shopping facilities have also shrunk town centre performance in Scottish towns (Findlay and Sparks, 2009). Yavas (2003) found trading hours to be one of the more salient influences on patronage – ahead of entertainment and other hedonic factors. Consequently, the High Street seems to be less convenient in satisfying people's needs for extended opening hours and has an obvious disadvantage. But if retailers do extend opening hours, there is no guarantee that the town centre's performance will increase. On the contrary, Auport (2005) highlights that a tight labour market, extended opening hours and the need to open on Sundays have all contributed to a significant increase in retailers' labour costs. Perhaps altering of shopping hours, as suggested by Brown (1992) can become a more sustainable solution for the High Street.

Opening hours is included in the Delphi.

35. Opportunities to experiment/pop ups

Whilst we will be including flexibility – opportunity to experiment and the flexible use of space has not been widely researched. In retail property terms experiments are risky – for example, in a Scottish shopping centre, 84 per cent of the net lettable area was occupied by low risk retailers (Hutchison, Adair, & McWilliam, 2008). The literature clearly demonstrates that landlords prefer certainty over innovation. Nevertheless, Neal (2013) makes references to innovativeness and new ideas that can improve the High Street offer.

Opportunities to experiment will be included in the Delphi

36. Ownership

The shopping centre literature tells us having ownership of retail centres means they can be managed more easily. Retailers in shopping centres have to comply with the conditions of leases – this might be opening hours, product range, merchandising standards etc. In addition, the overall ‘brand’ of the shopping centre is owned – therefore can be managed. However, we have no evidence on whether the concentration of ownership is good or bad for high street performance. We would suggest that a future research study could test the ownership fragmentation/ concentration continuum against secondary, historical data, such as vacancy rates. High Streets signified by fragmented ownership may be more resilient, in that individual units adapt more quickly to market demands.

Centralized retail management (CRM) or town centre management (TCM) is an attempt to apply the organizational advantages of an enclosed shopping mall to a group of independent and disparate downtown merchants. Operating on the premise that the whole is greater than the sum of its parts, CRM helps independent downtown commercial enterprises unite together to co-ordinate market analyses, promotions and advertising, special events, uniform hours, appearance standards for storefronts and window displays, security and maintenance. It involves a formal agreement amongst downtown merchants and building owners that acts as a covenant controlling aspects of retail operations on which consensus has been reached. Usually CRM (TCM) is administered by a private non-profit organization, such as a downtown association, merchants’ association or chamber of commerce (Robertson, 1997).

Property ownership is included in the Delphi.

37. Performance Indicators

See measuring economic impact/value.

38. Planning blight

Imrie & Thomas (1997) noted ‘very little has been written about perceptions of, or impacts of, CPOs [Compulsory Purchase Orders] in recent years’, but they did undertake a study which demonstrated their impact on SME retail performance in a secondary shopping area in Birmingham, means we can include CPOs as a factor in the Delphi. For Raco (1997, p. 398), whilst the ‘scope for a small locally based pressure group to influence institutions of [CPO] governance is relatively limited’, if effectively organised they may have a degree of influence. According to Imrie & Thomas (1993, p. 96) ‘the redevelopment of AW[Atlantic Wharf, Cardiff Bay] proceeded with little notion of how to manage the ‘fallout’ and the diverse problems which confronted its previous occupants’. A key difference between this period and the 2000s was the way in which the focus of regeneration has been extended to include city centres during the past decade (A. Tallon, 2009). What remains uncertain is whether CPO processes continued to be ‘insensitive and highly disruptive to existing businesses’ (Adams, Disberry, Hutchison, & Munjoma, 2002, p. 156). Early in this period Adams et al. (2002, p. 160) reported that ‘state intervention in the land market remains relatively rare because (of) the complex and often lengthy nature of compulsory purchase’ orders. Towards the end of the decade, Jones (2007) commented that: ‘CPOs have become the primary means of land assembly for regeneration schemes, and many local authorities and development corporations are now using such powers. The “Summer Row” scheme entered a dormant phase which prevented longitudinal approach for analysis. It was also realised that the CPO process would be difficult to investigate where contractual arrangements prevented businesses from openly discussing their compensation package (Henderson, 2011).

Planning blight will be included in the Delphi.

39. Quality of life

There is a political dimension to the town centre performance. “Conservative focus is economic ‘viability’ and social ‘vitality’ of town/city centres. Labour’s spotlight is on ‘liveability’” (Peel, 2003). Some researchers would argue that the search for a better quality of life has taken people away from urban centres. Suburban retailing increased due to consumer mobility and income, better quality of life at the edge of cities and lower costs (Birch, 2009). The literature sees quality of life as the ‘end state’, rather than a means to better high streets. Attractive, fashionable retail centres are thought to have a direct effect on inhabitants’ perception of local quality of life (Razin, 2007). Town centres have a critical role in promoting quality of life for older people encouraging moderate exercise (Andrews, 2001) and interaction (Farquhar, 1995). Attractiveness of urban environment is a key reason for older people choosing to live in city centres

(Tallon & Bromley, 2004). Cities need to be places of desire, memory, play and celebration (Sandercock & Lyssiotis, 2003).

Town centres have symbolic importance to the local community, providing it with sense of identity and common purpose (Guy, 1998) and can “improve the human condition” (Mitchell, 2009).

We suggest the contribution that High Streets make to quality of life is a more important measure of performance, rather than a factor that influences high street performance. We will not be including quality of life as influencing factor in our model. We feel this is a more sustainable conceptualisation as it puts quality of life at less risk of being subverted under economic targets.

40. Retail gravitation

This is included as ‘centre size’ as we are interested in the ‘pulling power’ of locations, not just retail.

41. Risk aversion

See discussion about opportunities to experiment. Town centres are very risk averse areas. “Developers hold the trump card in negotiations - saying they will not invest until ‘levels of risk are reduced’” (Peter Jones, Comfort, & Hillier, 2003) by Local Authorities, who are even more risk averse. However, it is likely Local Authorities feel slightly more confident taking risks that will generate investment. Local Authorities will go on determining retail and leisure provision by accident in reaction to private sector proposals (Guy, 2006).

Property owners are also very risk averse. The literature suggest that larger landlords will be willing to take more risks – “the scale of a shopping centre can allow landlords to accept extra risk in tenant selection as risk is spread” (Hutchinson et al, 2008) however, in reality, the largest shopping centres have the lowest risk tenants. A town’s propensity to take risks has not been studied, although Wrigley and Dolega (2011) found no relationship between “local supportive or unsupportive institutional factors” but we suggest that risk and decision making is a useful avenue for further research.

42. Signage – interpretive panels and links to Google maps

Orientation and flow and signage is studied in the literature – so this is included in the Delphi.

43. Social enterprises

De Magalhaes (2012) mentions Blackpool BID which has a social enterprise status and has secured access to variable amounts of governments grants to fund specific projects such as care for the homeless and shelter for street drinkers. Also, the Localism Bill will permit ‘communities’ to draw up ‘neighbourhood development plans’, build small developments, and establish social enterprises and community groups to provide services (Hall, 2011). Therefore, in small town centres, this could be really useful for the vitality and viability of their High Street.

Social enterprise will be included in the Delphi.

44. Public sector dependency

Public sector dependency is not studied in the literature – although catchment income and the number of households in receipt of benefit has been shown to influence high street performance. Many public services have decentralised (hospitals, schools) – moving to edge of town or even out-of-town locations. This obviously has an impact on town centre performance.

Integration of public services is included in the Delphi, as are linked trips and catchment income.

45. The implications of theme on town centre / high street renewal

‘Themed’ renewal, based usually on architectural heritage or on a site of historical significance, (e.g. a canal basin intersection) has been studied in the USA – these areas are termed ‘festival marketplaces’. Robertson (1997) notes “successful festival markets have a large regional population, an historic district near the downtown and existing tourists”.

Aspects of ‘theme’ are captured in the Delphi through various factors namely, atmosphere, attractions, heritage and tourism.

46. Upper floor usage (e.g. housing)

European planners have favoured high-density models of urban development, with residential flats above commercial units. The UK has followed US models of lower density developments, favouring suburban (flat) development over urban (upper-floor) development. Nevertheless, one of the basic laws of retailing, the Hotelling model, relates that the density of stores to customer density.

Upper-floor usage will be included in the Delphi.

47. Traffic

Shopping centre consumers point to traffic and insufficient parking as main reasons for disliking shopping streets (Ozuduru, Varol, & Yalciner Ercoskun, 2014). In the 1960s, virtually all major urban centres undertook redevelopment schemes to create planned pedestrianised shopping malls (C. Jones & Orr, 1999). Pedestrianised areas have the potential to bring about an increase in footfall for retail services of between 20% to 40%, which is the range reported by Hass-Klau (1993) from her analyses in Germany and the United Kingdom, and which is also consistent with the mean value of about 32% which was calculated from other studies of footfall impacts (Gehl & Gemzøe, 1999; Pearson, 2000). For impacts on retail turnover, a mean increase of about 17% was calculated and a range of 10% to 25% is suggested, based on studies by Newby (1992), Hass-Klau (1993), Saretzki and Wohler (1995) and the European Federation for Transport and Environment (2002a & 2002b). The calculated mean for the impact of a pedestrianisation scheme on retail rents is about 22%, and it was felt that a reasonable range is in the order of 10 to 30% (Hass-Klau, 1993; Colliers Erdman Lewis, 1995; Hass-Klau, C., Crampton, 2002). In relation to the impact on the retailing sector, the literature considers impacts in terms of footfall, turnover and rents. In this case, it seems likely that the major effect of pedestrianisation must be in terms of attracting more shoppers to visit the location, which in effect is measured by footfall. The increase in turnover then results from having attracted more shoppers and the increase in rents results from increased competition among retailers to locate where higher turnover can be achieved (Whitehead et al., 2006).

Pedestrianisation is included in the Delphi.

48. Transport mode choice

The more shopping opportunities one can reach within 10 min by bicycle, the less often one searches online (Kwan et al, 2007). Bicycle use and walking are also bound to distances to retail activity; Krizek and Johnson(2006) found that distances to retail and bicycle facilities are statistically significant predictors of choosing active modes of transport at close distances (e.g. less than 200m from retail establishments for walking and less than 400m to reach a bicycle route or cycleway for cycling). This suggests that cycling routes can potentially play an important part on transport mode choice to the city centre. However, barriers to cycling or walking such as traffic volume, poor lighting and lack of safety can deter increased use of these choices (Lee & Moudon, 2008). Policies that aim to reduce single car commute trips to a problem area (city centre) to achieve both environmental and congestion benefits are also evidenced in the literature (Ison, Rye, & Marsden, 2006). At least in the US context, a common response to parking restrictions, charges or cash-out initiatives is a switch to car pool. Shoup's review of the implementation of parking cash-out at eight firms (where commuters are offered the option of a cash alternative instead of their parking subsidy) found that "the number of solo drivers to work fell by 17% after cashing out. The number of carpoolers increased by 64%, the number of transit riders increased by 50% and the number who walk or bike to work increased by 39%. Vehicle-miles from commuting to the eight firms fell by 12%" (Shoup, 1997, p. 201).

Transport mode choice is included in the Delphi as accessibility (by various transport modes).

49. Unfair competition

Unfair competition has been studied in the retailing and planning literature, where large retailers use their significant financial advantage to invest in studies to support their development plans and also can afford to challenge Local Authority decisions on appeal. Practices are not illegal, but could be perceived as unfair. In Cardiff, a study found only 46% of off-centre non-food retailing was in areas identified by the local development plan (Guy, 1998). Again not illegal, but smaller retailers lack the capital to build retail sheds on out-of-town areas where land is cheap and are not invited to rent such space from retail property developers. Remember, "it is not

the function of the planning system either to inhibit commercial competition or preserve existing commercial interests' (DOE, 1986).

Unfair completion will be included in the Delphi

50. Walkability

US shoppers find regional malls inconvenient places to shop because of the extensive walking distances from parking lot to shops (Rogers, 1987). There is quite a lot in the US literature about "walkable urbanity" and its importance to downtown regeneration. Dense, mixed-use neighbourhoods encourage people to walk to work, to shop, to go to school and for other utilitarian purposes (Ewing, Schmid, Killingsworth, & Zlot, 2008). Unsafe environments, physical barriers such as busy roads or the basic design of an area can all discourage walking (Haklay, O'Sullivan, Thurstain-Goodwin, & Schelhorn, 2001; Ross & Mirowsky, 2001). Walking promotes community health and well-being (Ross & Mirowsky 2001) and travelling in vehicles does the opposite (Frank et al., 2006). Time spent in cars can increase obesity and increase Body Mass Index (Frank, Andresen, & Schmid, 2004, Frank et al 2006).

There is an association between the concentration of small businesses and entrepreneurial culture with lower rates of mortality, obesity and diabetes (Blanchard, Tolbert, & Mencken, 2011).

Walkability will be included in the Delphi.

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