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RETAIL COMPETITION AND THE PLANNING SYSTEM

Exploration of the planning system and its role in promoting and enhancing retail diversity in town centres – a case study on Dalston

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Being a Dissertation submitted to the faculty of The Built Environment as part of the requirements for the award of the MSc. Spatial Planning at University College London: I declare that this Dissertation is entirely my own work and that ideas, data and images, as well as direct quotations, drawn from elsewhere are identified and referenced

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ABSTRACT

Since the 1990's, the UK's retail landscape has seen a drastic decline in independently-owned shops while multiple retailers increasingly dominate. This paper adds to the debate on the contributions to diversity and consumer choice made by independent shops and goes further to examine the role played by national retail planning guidance (PPS6 – planning for town centres), in contributing to their decline in the town centre environment.

A case study approach on Dalston, an East London town centre undergoing early stage regeneration is used to holistically examine the importance of the independent shop to different stakeholders and assess how PPS6 is being applied by the Local Authority. To rationalize the processes and highlight the main issues fuelling this debate, current regeneration proposals for the area were analysed; interviews with independent retailers and 55 consumers were undertaken and secondary data from reports was examined.

The research shows that in regenerating the shopping area, independent retailers were lost and no consideration was made for their relocation or protection. The study further reveals that consumers in the area highly value independent shops in Dalston, particularly for their low-value and specialist ethnic provision. These reflect the socio-economic makeup of Dalston's catchment and to contribute to consumers' perception of the unique identity and character of this town centre. Consumers, though not opposed to the need for the area's regeneration, felt that it was important for the retail landscape to have a mixed provision of independent and multiple retailers.

As a discipline, planning seeks to balance economic, social and environmental concerns in order to encourage sustainable development. The approach used to guide the council's assessment of the retail proposals, guided by PPS6, undervalued the social contribution made by independent shops, to the vitality and viability of the town centre.

The paper concludes that, left unchecked, the current planning framework encourages the creation of monopolistic "clone towns", and in so doing, contradicts one of its main objectives – to create and maintain sustainable, diverse communities.

1. INTRODUCTION

In recent years, the UK's retail landscape has changed dramatically. Many British high streets, once populated by a diverse mix of shops... convenience stores, small shops, tobacconists, green grocers, butchers, fishmongers and the list goes on... many of which were likely to be locally owned, are rapidly being replaced by chain stores – supermarkets, global fashion outlets and fast food chains (NEF 2004). The success of these corporate retail giants has led to a homogenising effect on the physical outlay of towns. The outcome ... Britain is breeding "Clone Towns" (NEF 2004) as the shops and outlets which once gave Britain's high streets diversity, character and distinctiveness disappear.

Having ensured their market dominance by strategising for mass appeal, the chain store's position has recently become an even greater concern as retailing strategies increasingly incorporate the sale of items outside of their generalist provision. Known food retailers (e.g. Tesco, Asda) in particular have begun to provide a broader range of goods to their customers, encroaching on more of the available retail markets.

Planning as a profession is tasked with ensuring the creation and maintenance of sustainable, diverse cities and towns. Diversity in shopping places is needed to reflect the different groups of people within communities, offering 'genuine choice' to meet consumers' diverse interests, needs and demands (ODPM 2005, FOE 2005).

Many studies agree that small shops better provide this diversity in consumer choice when compared with their multiple equivalents (All Parliamentary Small Shops Group 2006, Coca-Stefaniak et.al 2005, NEF 2005). However, as multiple retailers increase their hold on the markets they serve (e.g. large grocery retailers account for ~85% of total UK grocery sales), there is potential for these chain stores, with their strong brand identities and readily available capital, to spawn a retail future which lacks this diversity. Facing such harsh competition, smaller, independent retailers, unable to fight "head on" with these retail giants, often have to adopt new retailing strategies to survive (NEF 2005). More often however, their inert susceptibility and vulnerability to change, has meant that many independent retailers are submitting to the pressures and competition they face, unable to survive against the "big boys".

The loosing battle of the small businesses (independent retailers) has however been documented in recent times, showing no positive signs of recovery. Over the last 25 years alone, Britain has lost over 30,000 independent retailers (NEF 2003). An investigation into the future of small shops across the UK (All Party Parliamentary Small Shops Group 2006), led to the production of the report, titled "High Street Britain: 2015" which predicted a dull future for independent shops. Independent convenience shops were not considered likely to survive by 2015 while independent newsagents have even darker futures, unlikely to survive at all. The report argued for the need to protect diverse forms of retail citing the social and economic benefits which such diversity brings to a community.

Another report by the think tank the New Economics Foundation (NEF 2004), entitled "Clone Town Britain" investigated the role and impact of chain retailers, concluding that these stores are damaging to the local economy, local identity and social inclusion.

The grocery market is perhaps one of the key retailing industries whose growing dominance has most contributed to the changing face of Britain's high streets. Investigations of the grocery market, undertaken by the Competition Commission, an independent body charged with ensuring and encouraging fair competition between companies in the United Kingdom was hoped to reveal and provide recommendations which would reveal the intensity of the retailing problem and provide key recommendations to facilitate a regulated approach to retailing. Their report (Competition Commission 2008) proposed the incorporation of a "competition test" in the planning assessment process. Such a test would be designed "to establish how many outlets a retailer has in a particular area and favour an application from a competitor if it was deemed there were too many..." (Competition Commission 2008).

Aim of study

Through in-depth analysis of the case study of an East London town centre, Dalston, this research will attempt to examine the approach taken to development and regeneration by one local authority in order to assess whether existing practices in planning foster or discourage diversity in the current retail context. This research approach will be used to explore changing consumer behaviour and preferences and to gain greater insight into the role and importance of the independent retailer versus the multiple retailers in both the retailing environment and as a contributor to the unique character and fabric of centres. Finally, the study aims to contribute to the debates on local identity and diversity and in so doing, assess the role of planning in retaining and protecting such diversity.

The study is guided by the following key objectives:

<u>Objectives</u>

1. To assess the changing face of retailing and understand the driving forces shaping this change
2. To understand consumer behaviour and to identify the importance and value of local identity to the consumer
3. To understand the role and importance of the town centre, the independent shop and the multiple retailer in order to gauge their importance and their contribution to the urban fabric of Dalston.
4. To assess the existing planning policy framework geared toward retailing in town centres to ascertain whether its focus is fit for purpose and consider whether the current planning policy focus on form not extent is adequate.

The following *research questions* have been formulated to guide the investigation of these objectives:

Objective 1	• How has shop ownership/occupation changed over the last 7 years? (although a 10-year period would have been ideal, data is only available for 7 years) • How has the shopping area evolved historically?
Objective 2	• What are the current consumer attitudes and patterns of consumption? • What do consumers value in their retailing environment?

Objective 3	• Are independent shops were important to Dalston consumers?...If so, why independent shops were important • Who are the existing shops serving? • What (if any) services do Dalston's independent shops provide that multiples do not? • How have independent shops provided these services? (What makes them unique?)
Objective 4	• What is the existing planning policy framework guiding retailing? • How well does the existing planning policy framework address the needs of local communities?

Background

1. THE RETAIL PLANNING FRAMEWORK

Retail planning in the UK is guided by Planning Policy Statement 6 (PPS6) – Planning for Town Centres (ODPM 2005). PPS6 has evolved to provide guidance aimed at the sustainable promotion and creation of "vital and viable town centres" in order to ensure the development of "successful, thriving, safer and inclusive communities". This "town centre first" approach focuses on the protection and enhancement of town centres, encouraging retail development to locate centrally and imposing greater restrictions and limitations on developments proposed outside the centre.

PPS6 requires new retail development proposals for town centre sites to be assessed based on the scale of the proposal (the amount of floor space to be provided) and the accessibility of its location. PPS6 also gives more minor recognition to the need to consider local issues and material considerations which may include: physical regeneration, employment, economic growth and social inclusion (ODPM 2005).

2. THE CASE STUDY – DALSTON

Town: Dalston

Borough: London Borough of Hackney

Issue: Town Centre Regeneration – on the road to lost identity?

Figure 1: The London Borough of Hackney (Dalston area highlighted in green)

Source: London Borough of Hackney (2007)

Dalston in context

Dalston is an inner London neighbourhood located in the east London Borough of Hackney. It is one of London's top priority areas for investment and action following the Mayor of London's commitment to its renewal in response to high levels of deprivation and social inclusion in an inner London Borough. Reflecting this, Dalston has been designated as a "major" centre and an "area for regeneration" in the London Plan (GLA 2008). Since this designation, Dalston has been targeted for large scale investment aimed at boosting its profile, accessibility, image and saleability.

Today, Hackney boasts one of the most diverse populations in London, with the most recent census stating that 41% of the populace are of a non-white background, the 6th highest ranking in London (London Borough of Hackney 2006). The 2006 borough economic profile recognised the largest minority ethnic groups include Other Whites (12.26%), Black Africans (11.98%) and Black Caribbean people (10.29%) (London Borough of Hackney 2006). A fuller picture of the socio-economic break-down of the area is provided in the appendices.

2. LITERATURE REVIEW

The literature review has been divided into themes reflecting the key objectives in order to identify the key issues facing town centre development and local distinctiveness.

Historic evolution of British Shopping places – the rise of the multiples (retail saturation)

The British retailing industry has evolved over time working to optimise economic prosperity as the world around it changed. In their studies of the 'evolution of shopping places' authors agree that there has been a decline through time, of numbers of independent retailers as multiple retailers have increased (Simms 2007, NEF2002, NEF 2004, GUY 2006). Two hundred years ago, Simms (2007) states that Napoleon called England 'a nation of shopkeepers'. BCSC (2007) noted that until the middle of the twentieth century, the retail market was relatively diverse with a large number of different independent retailers dominating high streets. Today however, there is often an unbalanced concentration of market share in the hands of a few top retailers.

Simms (2007) noted that the supermarket multiple philosophy began life in the US during the first World War classically competing by cutting staff numbers and 'lowering' its 'profit margins' then compensating by buying from suppliers in bulk and selling quickly and cheaply. Guy (1994) observed that in the UK, the 1960's saw the emergence of the first fully enclosed shopping centres, followed by a surge in shopping mall development within town centres during the 1960's and 1970's. GLA Economics (2006) noted that by the mid 1960's waves of retail decentralisation started to occur with food and convenience retailing moving largely from town and city centres into out of town supermarkets and hypermarkets. This was followed in the mid 1970's by a move of comparison goods retailers (e.g. electrical goods, DIY equipment), opening up retail warehouses on industrial estates. By the 1980's a further shift occurred, often attributed primarily to a changing planning framework. The Planning Framework which Schiller (1987 in BCSC 2006b) noticed became more "market-led", favoured retail development, enterprise and the generation of employment, and led to the further emergence of retail warehouse parks and greater numbers of out of town shopping centres. These provided a full range of both convenience and comparison goods under one roof (Schiller 1987 in BCSC 2006). This favourable development climate, coupled with an intense property boom created a seemingly prosperous landscape for the retailing industry. The 1980's also saw the increased diversification of retail development.

By the 1990's however, economic recession, coupled with a move by the UK government to tighten regulation on out of town retail development through its planning guidance – Planning Policy Guidance 6 (PPG6) (DOE 1993), brought retail decentralisation to a halt and saw the end of the boom in retail warehouses. It should however be noted that some critics like Clarke et al. (1997) claim that the slow down in large scale developments was inevitable given the fact that suitable sites were becoming increasingly hard to find

Government guidance was responding to what was seen as a negative trading impact on the trading capacity of exiting town and district centres as a result of out of town development, which was further compounded by shop closures and the widespread degradation of the physical environment in many areas (BCSC 2006). Their response in 1996 was the revised PPG6 which placed a renewed focus on town centres. A further revision to the guidance in 2005, now renamed Planning Policy Statement 6(PPS6), retained this town centre focus but incorporated other issues to clarify the position with regard to "the sequential approach", the treatment of "need" and relationships with policies for social inclusion and urban regeneration (Guy 2007). The success of planning guidance since PPG6, in refocusing development on town centres has been heralded by many commentators (Bach 2001 in Dixton and Marston 2003) however, Oughton et al, (2003) realised that the change to a "town centre first" policy focus, caused the retail landscape to change considerably, with a steady rise in town centre activity taking root throughout the late 1990's. Today the BCSC (2006) notes that the cumulative impact of these changes has meant that many of the UK's shopping places have become dominated by chain stores, particularly in the comparison goods market, with a small number of large retailers (multiples) dominating the shopping environment. Inevitably, this has resulted in a loss of independent retailers.

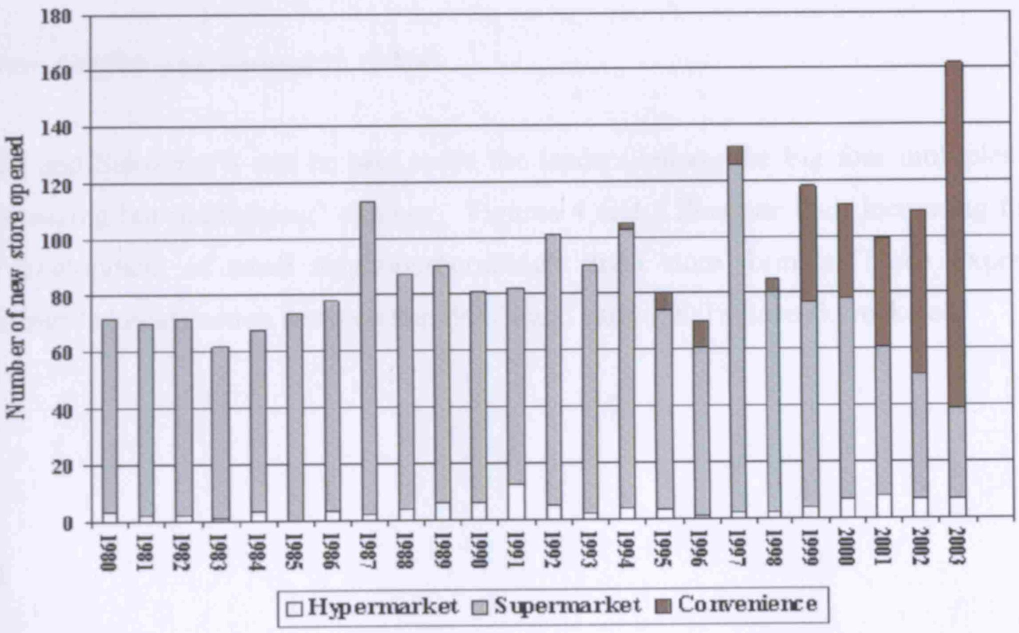
In an attempt to assess the true impact of the latest planning reforms on retailing with particular focus on the impact on the independent retailers in our town centres, attempts will be made in this study to re-assess the latest retail planning guidance (PPS6).

Multiples encroachment on the town centre

Between 1982 and 1990 the UK's top five grocery retailers increased their cumulative market share from under 25% to 61% of national sales (Wrigley, N. in Rosemary et.al 1993). The latest figures revealed that in 2007, on a national scale, large grocery retailers accounted for ~85% of total grocery sales, 65% of which were accounted for by four large grocery retailers – Tesco, Sainsburys, Asda and Morrisons (Verdict, UK Grocery Retailers 2008, p44 in Competition Commission 2008).

Griffith and Harmgarti (2004) noted that since the 1990's there has been an increase in the number of smaller store formats such as convenience stores, being opened by these four large retailers when compared with supermarkets and other large store formats (see figure 2). As this phenomenon becomes more widespread, the debate relating to the homogenisation of shopping places continues to be fuelled (BCSC 2006).

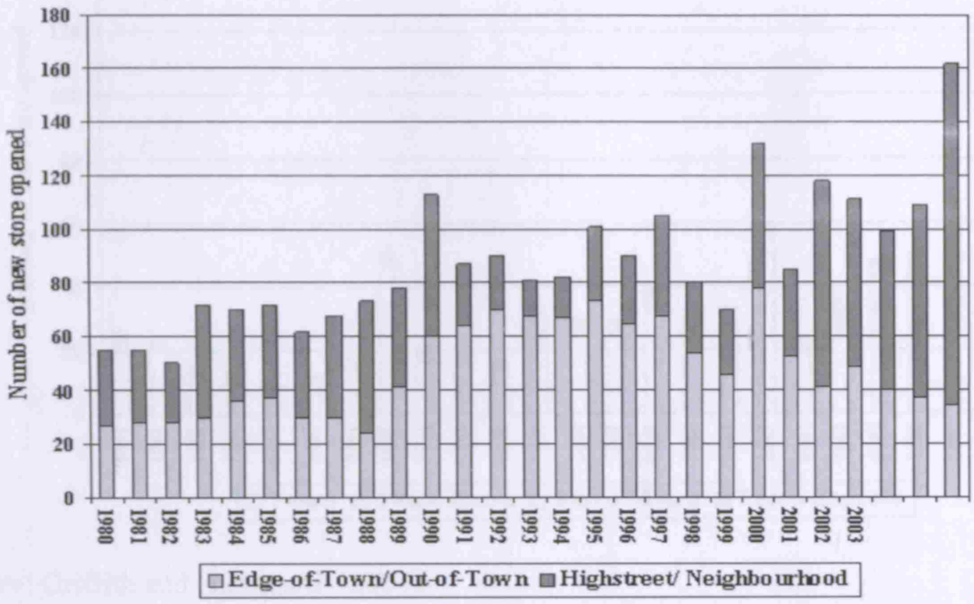
Figure 2: Store openings by store type



Source: Griffith and Harmgarti (2004)

Griffith and Harmgarti (2004) also observed that the changing retailing strategies of these multiples has meant that apart from reduced store size, stores are increasingly being opened in town centre, high street and neighbourhood locations (see Figure 3). This is in contrast to the older strategies which focused on large scale, out of town and edge of town centre development, typical of their early beginnings formats Griffith and Harmgarti (2004)

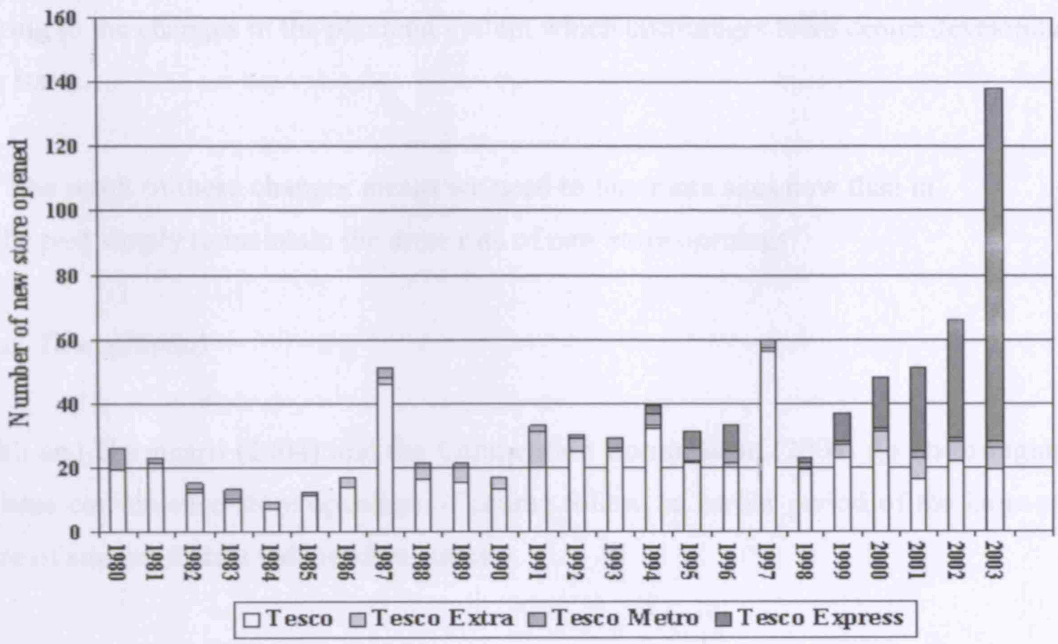
Figure 3: Store openings by location (big four)



Source: Griffith and Harmgarti (2004)

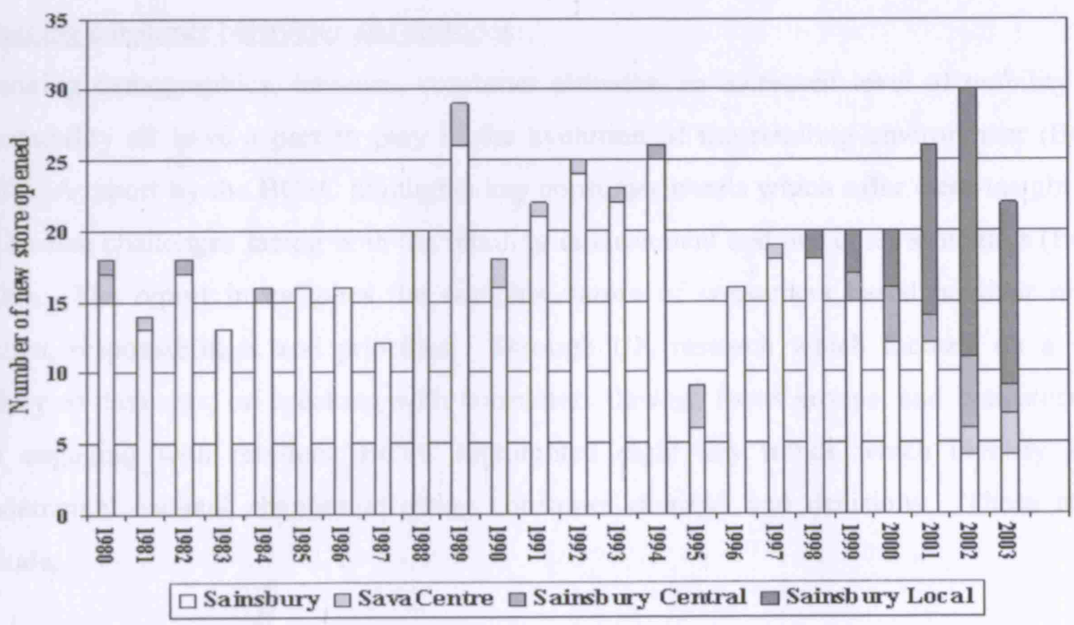
Tesco and Sainsbury's can be said to be the leaders among the big four multiples in this "downsizing but multiplying" strategy. Figures 4 and 5 illustrate their increasing focus on the development of small neighbourhood/high street store formats (Tesco Express and Sainsbury's Local) which between the 1990's and early 2000's have skyrocketed.

Figure 4: Store openings by Tesco Stores



Source: Griffith and Harmgarti (2004)

Figure 5: Store openings by Sainsbury Stores



Source: Griffith and Harmgarti (2004)

This trend and increased town centre prevalence looks set to continue as is reflected in Tesco's manifesto which highlights to its customers a key to their town centre strategies: Referring to the changes in the planning system which encourages town centre development, Tesco states...

> "The result of these changes means we need to buy more sites now than in the past simply to maintain the same rate of new store openings"

Source: Tesco(2008a)

Griffith and Harmgarti (2004) and the Competition Commission (2008) go on to highlight that these convenience store openings of course follow an earlier period of the large-scale closure of smaller format independent stores.

It should however be noted that the changing face of the retailing landscape in our town centres has not been solely down to changes in the planning system, encouraging these retail giants to increase their dominance of the retail industry. Changes in the economic climate and further more, changing consumer behaviour and attitudes have also played an important role in shaping this new retailing landscape (BCSC 2007).

<u>Changing consumer behaviour and attitudes</u>

Changing demographics, incomes, consumer attitudes, an increased level of mobility and accessibility all have a part to play in the evolution of the retailing environment (BCSC 2007). A report by the BCSC highlights key consumer trends which offer clear insight into the human challenges facing both the retailing environment and our cities structures (BCSC 2006). The report investigates the complex nature of consumers based on their needs, desires, responsibilities and priorities. Through UK research which focused on a wide variety of data sets, on speaking with consumers through focus groups, and brainstorming and engaging with retailers, BCSC highlighted eight key trends which identify some fundamental societal changes affecting consumer demand and decisions. These trends include:

1) "Connectivity – a more connected society means consumers are exposed to a wider cultural sphere, have broader tastes and can take advantage of non physical methods of purchasing
2) Abundance – consumers have more things than they need so persuading them to buy more comes down to stimulating wants and desires
3) Wellness – people are more health conscious
4) Demanding – today's consumer expects more and will readily defect from retailers or shopping places which do not deliver on these expectations
5) Post materialism – people today are more ethically and socially aware and increasingly willing to base purchasing decisions on these convictions
6) Pressured – people have less time and more stress hence increasing emphasis on convenience
7) Limelight syndrome – shoppers increasingly look for status, recognition and self-esteem in their shopping and leisure habits
8) Jaded – people are bored with shopping and retail and will increasingly look to spend their money in other consumption –based activities"

Excerpt from BCSC (2006)

The report also highlights the need for recognition that "many shopping places can no longer be all things to all people and that they need to focus in on certain consumer groups or certain types of retail trips" (BCSC 2006). Consumer needs also seem to reflect a requirement for shopping places to differentiate themselves much more than they do at present, with consumers increasingly requiring distinction, and shopping places which both stand out from the crowd and boast a good tenant mix (BCSC 2006). This research adds to the social argument against "clone towns" and the current state of retailing, evidencing the need to retain diversity in the retail environment, if only to satisfy the changing desires and needs of the consumers for which it provides.

In conclusion, this review of the literature has highlighted the following key findings:

- In the retailing landscape, multiples have increased both in numbers and in their dominance of the grocery retailing market shares.
- Independent shops have in contrast, decreased in numbers
- Retailing strategies have shifted focus from out of town to the town centre

- Changes in the Planning Policy framework have facilitated this town centre shift
- Changes in consumer behaviour, demographics and habits are instrumental in changing the face of the retailing environment
- Consumers' desire diverse, multifaceted shopping environments.

3. RESEARCH DESIGN AND METHODS

This project combined data from both primary and secondary sources in an effort to gain a holistic understanding of the issues facing the retailing environment. In order to assess the relative roles and importance of the small independent retailer when compared with multiple retailers, a case study approach was used to analyse one shopping area (Dalston), known to be undergoing rapid change in respect of its retail offer was assessed.

As a methodology, the case study approach offers a method of triangulation (Tellis, 1997). When looking at singular areas, it is "a research strategy which focuses on understanding the dynamics present (Eisenhardt K, in Huberman and Miles, 2002) and enables the researcher to consider all relevant stakeholders and the interactions between them in a particular case (Tellis, 1997). Case studies have been found to have many advantages when investigating real situations where a researcher may need to respond to "the multiplicity of perspectives present..." (Adelman et al., 1976). This method of analysis also has the added benefit of allowing the researcher to consider alternative approaches during the investigation in response to new information which may emerge throughout the course of the study.

The Dalston Shopping Area in the London Borough of Hackney was chosen as it represents a major shopping area, with a strong, predominantly independent retailer representation that has been identified in the London Plan as an area to undergo regeneration. Current development plans for the area include the incorporation of an underground line (Transport for London project for the extension of the DLR) and development of large scale mixed-use development projects (London Borough of Hackney 2008b).

This research relied heavily on secondary data sources which, supplemented by primary research, enabled a clear picture of the issues and challenges facing the Dalston retailing environment to be assessed. The following section provides an in depth explanation of both the data sources and approaches used in analysing the secondary data available. The primary research undertaken to supplement gaps in current consumer and retailer attitudes as well as to provide an updated retail land use survey is explained later.

<u>Main Secondary Data Sources</u>

1. Experian GOAD survey data (covering 2001 and 2007)

N.B. All data analysis is original work done undertaken by the researcher.

This is Retail Survey data detailing existing shops in the Dalston/Kingsland area, specifying street names, property numbers, names of trading companies, classifications based on multiple outlet or independent shops, floor space data, details of the primary activity in the store, the classification of units according to the Use Classes Order, and the GOAD subclass (convenience, comparison, retail, service, vacant premises etc.). A snapshot of the data provided via this source is provided in the appendices.

Limitations: Multiples are classified as any store which is part of a network of 9 or more outlets nationwide. This criterion differs from other reports used (e.g. FOCUS reports categorise multiples as having 5 or more outlets). This project adapted by accepting that every multiple listed would be defined similarly in other reports.

2. Local Authority Commissioned Surveys (2005)

Roger Tym and Partners Retail and Leisure Capacity Study (May 2005) – includes a visitors survey, health check survey and- household survey

- Household Survey

  This survey analysed a representative sample of 1200 households in a defined study area (in 12 different geographical zones around Hackney – including all of Hackney and a small number of wards in Islington and Tower Hamlets), based on the perceived spheres of influence of Hackney centres (catchments).

- Visitor's Survey

  This profiled the visitors to existing centres in the borough to assess each centre's function and role. This included face to face surveys in Dalston and other centres. The data gathered in this survey included visitor residence, visitation reasons, 'the amount of expenditure made on comparison and convenience goods' by these visitors.

- Health Check

  Data from various surveys based on 'key performance indicators of town centre vitality and viability' noted in PPS6.

3. Local Authority publications

4. FOCUS Data (www.focusnet.co.uk)

FOCUS, an online facility providing data on town centres, provided demographic, socio-economic and commercial property perspectives of the town centre

Limitation: Data provided relates to the borough of Hackney. A detailed focus on Dalston's shopping area was missing. Where useful, generalisations have been used.

5. Census Data

Provided socio-economic data on the case study area.

6. Local Authority Planning Applications, decision notices and Committee Reports

Limitation: Reports compiled by local authority planning officers for public viewing do not necessarily provide complete detail on the ins and outs of the pre-determination negotiations and discussions. Reliance on this data without supplementing this with an interview with the case officer may therefore not reveal all elements of the planning considerations.

<u>Primary Data Sources</u>

1. Retail Land Use Survey

The three main permanent (non-market) shopping streets were identified as Dalston Lane, Kingsland Road, Kingsland High Street and Stoke Newington Street. These streets were identified as those with the majority of shops from GOAD data. GOAD data was also used as the foundation for a further retail land use survey which I undertook on 25th July 2008 to provide the most up-to-date picture of the units present and their status of activity (e.g. trading or vacant).

The survey was undertaken on a weekday at 12:30pm (during and after lunch), to ensure that the clearest understanding of the trading status of each premises was attained. It was considered that at this time, most shops which were actively trading would be physically open while vacant shops had shutters down or were boarded up. Where the trading status seemed ambiguous, clarity of the trading position was provided either by closer inspection of the property e.g. where no furniture present within premises, padlocked doors, or overly dusty units, or where necessary, the shop owners/assistants of neighbouring premises were asked about the trading position of adjacent units.

2. Shoppers Survey

Based on the hypothesis that Independent shops are important to the retail provision available to shoppers in the Dalston Shopping Area, a shoppers survey (questionnaire) was undertaken to gauge customer opinions of the retail provisions and to ascertain what these shoppers valued in the Dalston shopping experience. Because the approach required a more exploratory and inductive examination of the function and role of the retailing units in the area, a qualitative study approach was employed.

The questionnaire was designed to meet key objectives aimed at closing the gap in quantitative data on customer attitudes to independent shops in this specific locality.

Respondents' were asked four questions:

1. Why do you usually come to Dalston rather than anywhere else to shop?
2. If the shopping area was to be rebuilt, what type of shops would you prefer to see?
3. Where would you go to get the items currently attained in Dalston (only asked if respondent believed in response to question 2, that only "well known" shops should be placed in Dalston)?
4. Where do you live?

Respondents' ethnicity and gender were recorded for social analysis. Full details of each question and the responses received, have been published in the appendices.

In total, 55 interviews were undertaken. The results of the survey are tabulated in the appendices. The shoppers' survey was undertaken on a Saturday from 11am, a time when the shopping area is known to truly active. As Dalton's retail offer includes the high street stores, a shopping centre and a market (which trades during the week but trades for the longest period on a Saturday), a Saturday was purposely chosen as the test date, likely to represent the period with the highest footfall. To provide representative data, the sample was acquired from a range of locations around the identified streets and within the Kingsland Shopping Centre. Attempts were made to question every 5th adult encountered, regardless of gender or ethnicity to ascertain a truly random sample. In the early stages of data collection however, it became clear that often times, the 5th person chose not to respond. Therefore, the sampling method was changed on the day and every person encountered was asked to participate in the survey. Those who agreed were sampled. Additionally, in an effort to improve the diversity base of responses, extra effort was made to engage relatively equal numbers of males and females and with persons of ethnicities differing from the majority.

Respondents who indicated that they do not shop in Dalston and were perhaps only utilising the area as a transit point were not included in the survey results. Question 1 was deliberately left open-ended in order to make it devoid of categories. As such, respondents freely admitted their main reasons for shopping in Dalston.

3. Shopkeeper Interviews

Once the project aim was established, to ensure that objectives were properly focused, shop owners and shop keepers/managers were interviewed in a semi-structured format, with the structure of interviews focusing on their responses and the issues that were more important to them. They were questioned at a time when shops were deemed to be quieter (Saturday 9:30am). These choices had the advantages of keeping their full attention and not biasing the issues they were most concerned with, as well as the reasons why.

Disadvantage - The interpretation of these interviews was subjective and as the day went on, keeping their attention was more difficult. The objectives chosen are a partnership of my original ideas and theirs

<u>Assessment of Committee Reports, Planning Applications and Decision Notices</u>

In considering development proposals, Local Authorities are statutorily required to publish the details of such proposals along with a report detailing how the proposal was considered. It was necessary to obtain and analyse committee reports, planning applications and decision notices relating to the main regeneration proposals already underway in the town centre.

This was done to gain insight into the Council's approach to assessing town centre development proposals which hold a strong retailing aspect; to understand the planning debates emerging from all sides (the council, the public, the retailers and other key stakeholders); and to understand the weight placed on debates around retailer representation in the town centre.

Two major mixed-use development schemes with planning permission were identified - Dalston Square and Dalston Junction Interchange Scheme - and the details related to their planning applications were obtained.

Both applications were decided by a planning committee hence the committee reports were available on the council's website. Documentation relating to the decision notices and legal agreements (Section 106) were obtained in person from the Council's planning department. Particular attention was paid to the sections of the reports which highlight consultation responses and the planning officers' response to them, in an attempt to understand the rationale and considerations applied.

Methodology advantages, disadvantages and limitations

The method used for the Retail Land use survey worked very well to identify the vacancy levels of retail units. By using GOAD data as the basis for my own survey, I was able to make a direct data comparison with previous years.

To gain consumer opinion, the quantitative approach of questionnaires was used as what needed to be understood was better known. The advantage was that 'interviews' were concise and quantifiable.

As noted in the shoppers' survey, the sampling method was changed on the day as the previous sampling methodology was found in practice to be time consuming. This was found to be because of both the chosen day (prime shopping day – Saturday) and time (peak shopping time) of the survey. The initial method had accounted for large numbers of people but not peoples' mood and perceived time availability (people were rushing around!). By changing the sampling method to base it on consumer willingness to participate, I was able to maximise responses. However, because of the level of targeting used in the new sampling method, the ethnic and gender proportions of respondents may be skewed.

During the analysis of the data, it was felt that question 3 of the shoppers' survey (see appendix) should have been asked of every respondent, to gain a stronger understanding of the 'value' of Dalston's specific retail offer to consumers. This would have identified the distance customers would have had to travel to obtain similar items, which, if assessed alongside a question about their willingness to make such a journey, may have better contributed to the debate on the niche role of Dalston's retail offer.

4. *PRESENTATION AND ANALYSIS OF CASE STUDY RESEARCH MATERIAL*

This section is divided into 3 sub-sections exploring the current character of the Dalston shopping area, the possible future of the same and the role of the planning framework in shaping this change. The aim is to investigate how planning guidance shapes town centre retail development and whether the planning system fosters or discourages diversity in Dalston's retailing environment.

4.1 DALSTON - CURRENT CHARACTER OF THE SHOPPING AREA

4.1.1 Overall Retail Picture

As a centre, Dalston supports 49,500 sqm gross of ground floor space. Of this, 42, 200 sqm is utilised for retail (Tym and Partners 2005). The main focus of the district's retailing activity centres around three key forms of retail offer:

- Kingsland Shopping Centre
- Street level shopping frontages
- Ridley Road Market

Kingsland Shopping Centre, opened in 1989, is Dalston's only covered shopping centre, providing 11,152sqm of retailing space (Focus 2008). It provides Dalston's only attempt at a more "modern" retail provision.

The street level shopping frontages are dominated by small retail units. A typical snapshot of the street level retail offer would include discount stores, low price independent fashion retailers, beauty/hairdressing salons, designer clothing shops, specialist ethnic food shops, butchers and fishmongers (based on GOAD data and my retail land use survey).

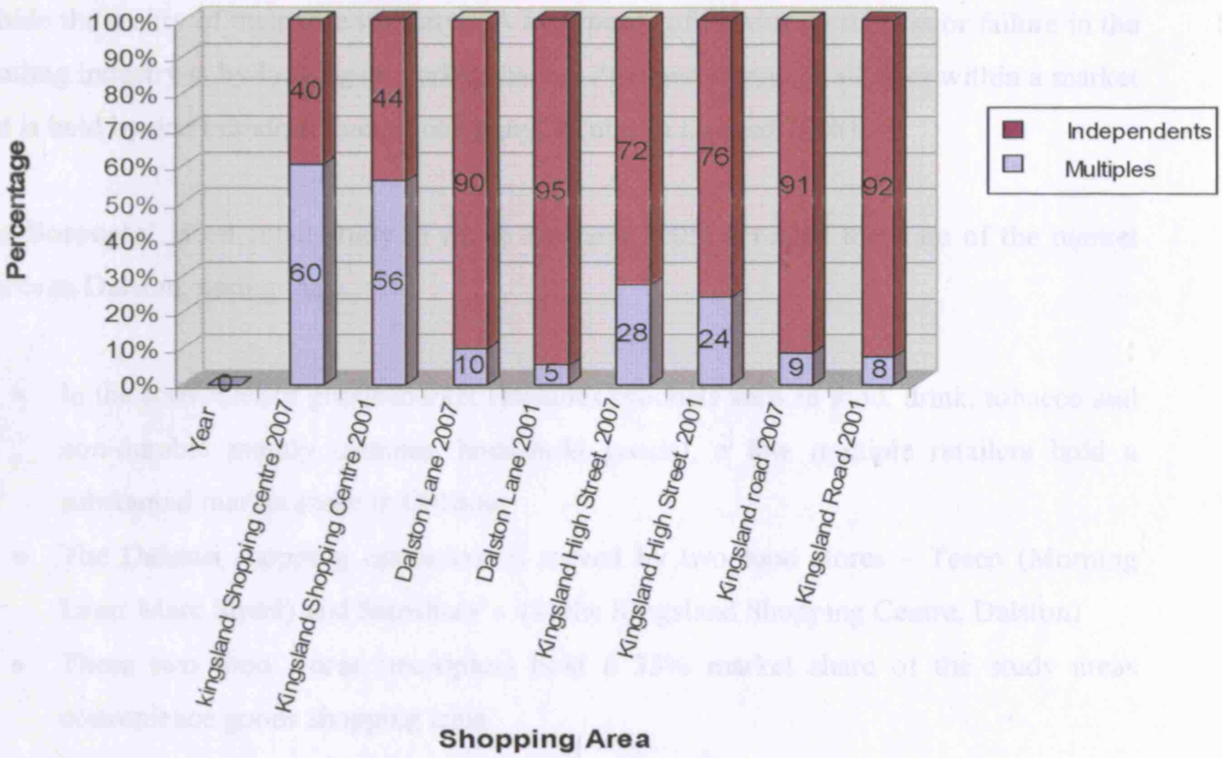
Ridley Road Market is identified as an important key attraction to the centre (Roger Tym 2005). Wikipedia (2008) paints a picture of its provisions highlighting... "Fruit and vegetables, some fairly exotic, are available at low prices, and the local halal butchers, clustered around the high street end of the market, are hard to beat in terms of price". The market also sells clothes and bric-a-brac.

For the purposes of this study, further analysis of Dalston's retailing environment will focus on Kingsland Shopping Centre and the three main shopping streets - Dalston Lane, Kingsland Road and Kingsland High Street.

4.1.2. Independent retailers physically dominate the shopping environment

Figure 6 depicts my analysis of the Goad retail dataset showing the changing proportions of independent and multiple retailers occupying Dalston's main retailing streets between 2001 and 2007. Although there was a slight decrease in the number of independent retailers relative to multiple ones over that 6 year period, the proportion, particularly on street level shopping frontages (main shopping streets) still vastly favoured independent retailers. In 2007, over 90% of the occupied retail units on Dalston Lane and Kingsland Road were independent shops. The balance between independents and multiples also remained relatively stable to 2007, painting the picture of a thriving independent retailing industry.

Figure 6: The changing face of Dalston Shopping Area Multiples vs. Independents (2001 - 2007)



Based on original analysis of Goad Data and original land use survey (2008)

According to the Hackney Health Check report (Tym and Partners 2005b), this physical dominance of independent retailing shops can be partially explained by the historical presence of the smaller shop units that characterise Dalston's street level shopping environment. These, coupled with affordable rents are more appealing to the small independent shop retailers as multiple retailers often require large floor plates (Tym and Partners 2005). This physical makeup however, has been criticised as a handicap to "Dalston's ability to compete with other major centres in North London" (Tym and Partners 2005).

4.1.3 The hidden dominance of the multiple retailers

The physical dominance of the independent retailers on the shopping streets however can act to hide the reality of their true viability. A key means of measuring success or failure in the retailing industry is by looking at market shares - "the percentage of all sales within a market that is held by one brand/product or company" (Tutor2u Limited 2008).

The Boroughs' latest retail study (Tym & Partners 2005) revealed the state of the market shares in Dalston, noting that...

- In the convenience goods market (includes products such as food, drink, tobacco and non-durable mainly cleaning household goods), a few multiple retailers hold a substantial market share in Dalston.
- The Dalston shopping catchment is served by two food stores – Tesco (Morning Lane, Mare Street) and Sainsbury's (in the Kingsland Shopping Centre, Dalston)
- These two food stores (multiples) hold a 35% market share of the study areas convenience goods shopping trips.
- Both command ~ 50% share of primary trips from convenience goods from their local zones
- Residents show strong customer loyalty to these stores. Half of all households *only* use one of these stores and other households spend on average 60% of their total convenience goods expenditure in the primary location

On the basis of this market share analysis, the physical illusion of independent shop dominance is quickly overturned; revealing that the multiple shops are dominating the Dalston's retailing landscape.

Since the Boroughs' last retail study (Tym and Partners 2005), Tesco has opened another town centre store "Tesco Metro" on Kingsland High Road. On the basis of their track record, it can be expected that as more of these and other multiple owned stores open in and around the Dalston shopping area, these multiple retailers, already holding a large share of their retailing markets, will continue to increase their hold, reducing the market share available for existing independent retailers. The concern here is that as independent retailers hold on to less and less of the market share, their viability becomes increasing compromised. It is likely that, unable to support the continuance of their businesses under such harsh conditions, more independent shops will continue to be lost.

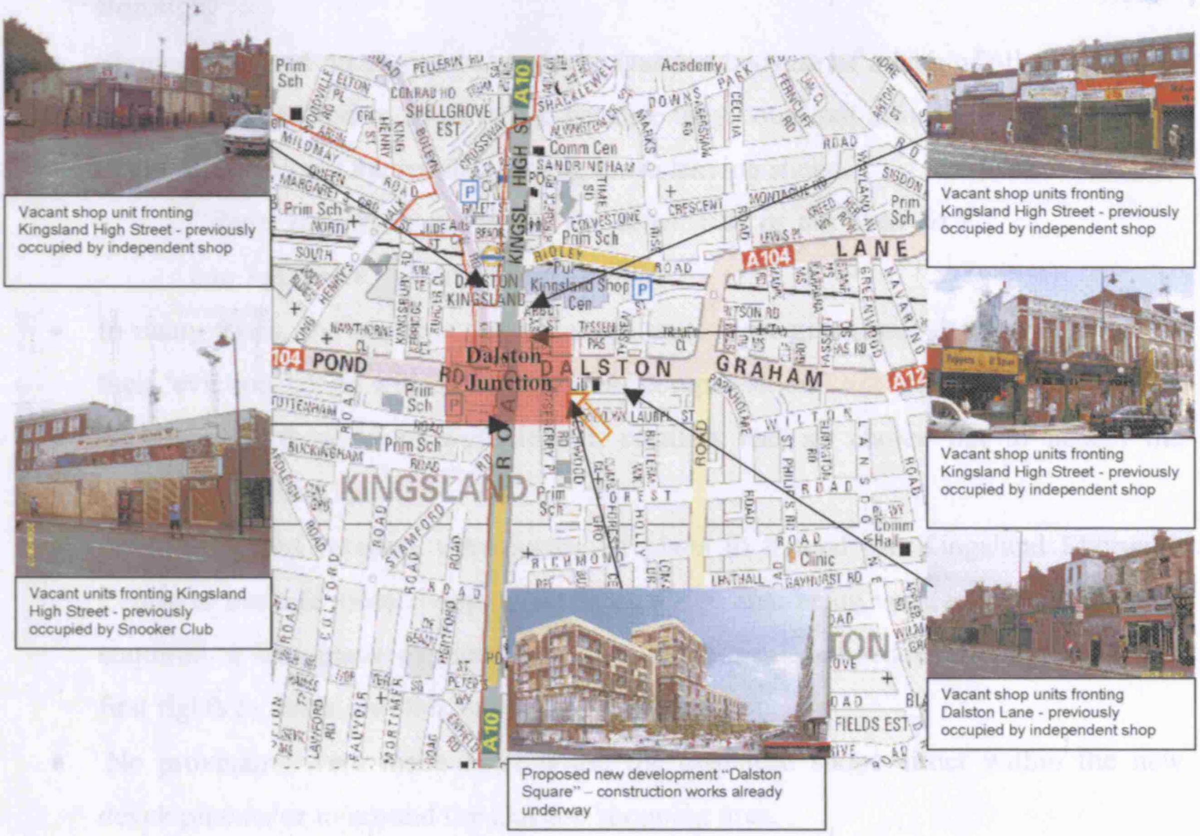
4.2. DALSTON- POSSIBLE FUTURE OF SHOPPING AREA

In the last year (2007-2008), large scale regeneration efforts have rapidly changed Dalston's retailing landscape. This is likely to have a dramatic impact on Dalston's future character. This section of the study aims to assess: the physical changes to the retailing environment resulting from these recent regeneration efforts; the way in which key regeneration proposals for the area were considered and implemented using the current planning framework and; consumer opinion and reactions to the regeneration activities underway. This assessment should enable me to better understand what factors contribute to Dalston's "identity" and in so doing, understand the conflicts around the issue of identity in light of current regeneration programmes.

4.2.1 Current Regeneration Strategy: Making way for the regeneration programmes

Figure 7 provides a graphic representation of the current state of a major part of the town centre retailing area

Figure 7: Images of the retail frontages around Dalston Junction – the main target area for regeneration efforts



Source: Data and photos from my retail land use survey

Noticing an apparent dead physical state of what should be, a vibrant, active retailing portion of the area, I felt it necessary to ascertain, first hand, the sequence of events leading to the rapid reduction in occupied units in this area. Probing interviews conducted with some of the independent retailers occupying units close to the affected sites, exposed the nature of what I would term a "clear out" strategy, used in the first stages of implementation of the regeneration programmes.

The "Clear out" strategy:

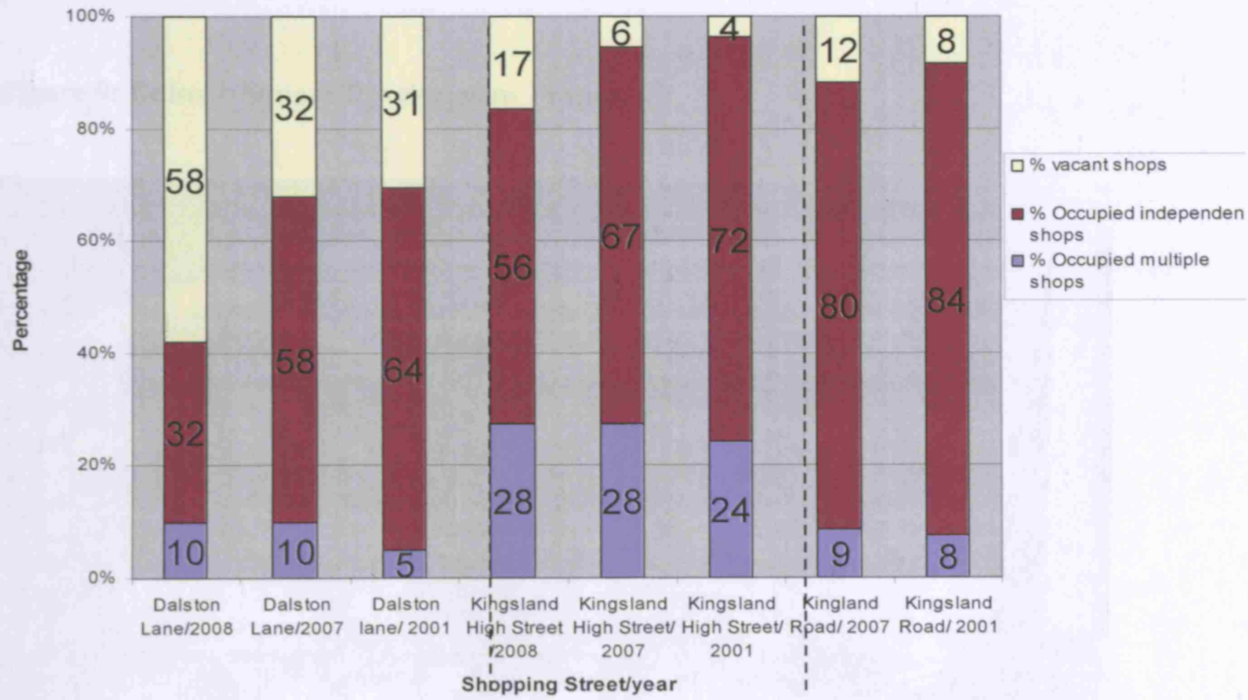
- Many of the vacant retail units with frontages onto Kingsland High Road had been 'bought out' by Transport for London (the land owners – currently in the process of extending the East London Line as part of a scheme to improve links to East London).
- Some of the displaced independent shops have relocated to units around the Dalston shopping area; however, the majority have left the area and in many cases, left the Borough.
- Shopkeepers had no choice but to leave Dalston because of a lack of other available units in the area and in some cases, because they could not afford the rents attached to available units. One retailer, among those leaving stated...

  "Rents are much higher on the other side of the road so I can't go there" (independent retailer)
- In many cases, the occupiers of the retail units were given only 3 months notice of their 'eviction' along with some financial "compensation".
- As many of these units were leased, retailers had no choice but to accept the compensation and leave.
- Some displaced retailers were aware of plans to extend the Kingsland Shopping Centre to provide more shopping facilities in the area being vacated....although they enquired, it was made explicit that they (as the displaced retailers), were not given first rights to move into this future new development.
- No provisions were made to re-house the displaced shops either within the new developments or in/around the Dalston shopping area.

"We've had a shop here for 13 years and it's been great. At least we still have two other shops in other centres Walthamstow and Romford so we will be fine. It's a shame to leave here because business was good, but when you have to go, you have to go!" (Independent shop manager)

My quantitative analysis of the occupancy levels of shops on the three main shopping streets (Kingsland High Street, Kingsland Road and Dalston Lane) using Goad data and my current retail land use survey, provided the concrete evidence to back up the anecdotal information from the retailer interviews, showing a sudden doubling in shop vacancy levels between 2007 and 2008 on these streets (see Figure 8). Dalston Lane is the most heavily affected street, showing a 26% reduction in proportions of occupied shops between 2007 and 2008. Further assessment on the basis of retailer representation, shows an obvious trend in that the shops vacated were previously occupied by independents. The trend was reversed in terms of the proportions of multiple occupied units in these streets. As the units have remained unoccupied, it is safe to propose, in the context of the interviews and regeneration proposals for the area, that these units are not to be re-occupied. These activities act to re-iterate the vulnerable nature of independent retailers highlighted in previous studies (NEF 2005, Smith and Sparks 2000)

Figure 8: Changing occupancy levels of retail units on Dalston's main shopping streets between 2001 and 2008



Source: Based on original analysis of Goad Data and original land use survey (2008)

4.2.2 Current Regeneration Strategy: Regeneration Schemes

4.2.2.1 Dalston Square – planning application and permission

A major new development comprising large scale housing, cultural facilities and retail provisions is currently under construction in central Dalston. A partnership among the local council, Transport for London, a major residential developer and the London Development Agency saw planning permission attained in 2006 for a mixed use scheme known as Dalston Square. This is the first of an expected influx of large-scale developments in central Dalston whose cumulative impact could change the area drastically. Dalston Square is analysed here in order to understand the approach taken by the local authority and the level of consideration given to the impact of these proposals on Dalston's retailing structure, particularly with regard to the mix of independent and multiple retailer provision.

Figure 9: Dalston Square Development Proposal

Source: Dalston Square (2008)

Dalston Square – the proposal

The mixed use scheme is to comprise the following:

- 244 residential units
- 1711 sq m of class A1 (Retail), A2 (financial and professional services), A3 (restaurant/café), A4 (Drinking Establishments) floor space.
- 424 sq m of B1/D1 floor space (Workshop, Studio, Community)
- 3168 sq m of D1 floor space (Library and Archive)
- 4900 sq m public open space
- 65 car parking spaces
- 4 motor cycle parking spaces
- 244 cycle parking spaces

Source: London Borough of Hackney planning application no. 2006 0886 decision notice

The scheme's retail provision is in the form of four "retail shells" of varying sizes. Future proposals will be allowed to subdivide these shells only if there is a mix in unit sizes provided. This is one way in which the planning department is currently able to have an input into the possible retail mix. Occupancy of these retail shells in terms of the retailer representation (multiple vs. independent retailer) is not monitored by either the local council or the original developer. Attempts were made to find out who would be occupying the units, however, telephone correspondence with the developers revealed that the units were sold on to a private retail company who will independently sell them on, in accordance with retail practice.

In negotiating to maximise the community benefits attained from this proposal, a legal agreement (Section 106) was entered into between the council, the developer and the London Underground Ltd. However, this agreement focussed only on seeking contributions for a proposed open space – This and affordable housing were the two "public goods" focussed on as the planners sought to 'maximise' community benefits.

Dalston Square - Assessment of committee report

Within the officer's report for consideration of the proposal's acceptability to the planning committee, little emphasis was placed on external objections to the proposed retail element of the scheme. These concerns included recommendations for supporting provisions to be made to ensure the continued existence of independent shops within the development site.

Dalston Square – Consultation

In objecting to the Dalston Square redevelopment scheme, a local pressure group "Organisation for Promotion of Environmental Needs Ltd (OPEN)" raised the following concerns:

- *"The scheme has no proposals to retain a proportion of lettings for small businesses, creative industries, community organisations or for the local community.*
- *OPEN is generally not in favour of large-scale national multi-national retail spaces uses.*
- *The influx of national retailers may result in limited employment opportunities"*

Source: Committee Report dated 13.07.2006 re: appl. No 2006 0886

Although raised in the objections, the proposals' impact on Dalston's retailing environment was not considered to be a major issue. In fact, the case officer accepted that...
"The inclusion of retail floor space seeks to **promote the retail attractiveness** of Dalston Town Centre. The quantum to be provided is relatively modest and would not draw consumers away from the existing shopping areas in the town centre". It can be argued that this comment highlights a restricted and almost single minded approach taken in considering the impact of the retail aspect of the scheme. The almost "tick box" approach to its consideration highlights a lack of insight or concern in relation to the long term social impact of the scheme on the retailing character of the area. Although raised in objections, no steps were taken by the local authority either directly or indirectly, to address this public concern. These concerns recognised and placed value on the social and deeper economic impact of the scheme and its potential to degrade some of what may be considered both a strength in the retailing character and in the opportunities made particularly available to the small business owner, specially so in Dalston.

Interestingly, according to the committee report, although consulted, no comments were received during the consultation from the Council's Economic Development or Regeneration departments - the two departments whose remit should have raised such concern and perhaps provided for or considered options for offsetting these social costs. Based on this information, the need to protect local independent shops, although raised as an issue by community groups, was not considered , be it in directly (by the planning department) or indirectly (by other socially or economically responsible departments consulted).

4.2.2.2 Dalston Junction Interchange (DJI) Scheme

Another scheme which incorporated the demolition of aspects of the existing retail provision, gained approval for 180sqm of community uses and 1,500sqm of commercial floor space (A1/A2/A4/A4/A5) is the "DJI" scheme. Cumulatively, these two schemes provide a range of commercial unit sizes, which will potentially attract a number of different commercial tenants.

Retail-related objections to this scheme highlighted the following issues:

- *Concern over the loss of local business & employment*
- *Potential for impacts on existing traders due to increased rents in the area*

Source: Committee Report dated 30.03.2006 re: appl. No 2005/2840

Again, the planning officers' responses showed a similar lack of concern in regard to the loss of independent traders...

"The proposal has incorporated a mix of non-residential uses. These are located predominately on the ground floor...the inclusion of these uses will **create an active frontage** along the ground floor of Block 1 and ensure that there is activity around the station entrances. The inclusion of retail floor space will seek **to promote the retail attractiveness** of Dalston Town Centre whilst not being a significant shopping centre and thereby drawing consumers away from the already existing shopping areas provided in this town Centre".

Source: Committee Report dated 30.03.2006 re: appl. No 2005/2840

Again, this highlights an almost mechanical approach to the retailing aspect of the scheme and identifies the community's concern around the changing retailing face of the Dalston landscape.

4.2.3 Consumer Preferences – a search for Dalston's identity

In their research on marketing identity, Erickson and Roberts (1997) recognised that "*Identity can refer to those aspects which make a place identifiable or unique but can also refer to the way individuals or groups identify with a place*". On the basis of this argument, this section aims to explore consumer preferences and desires with regard to Dalston as a place, in an attempt to hone in on what gives Dalston its 'identity' from the retailing point of view.

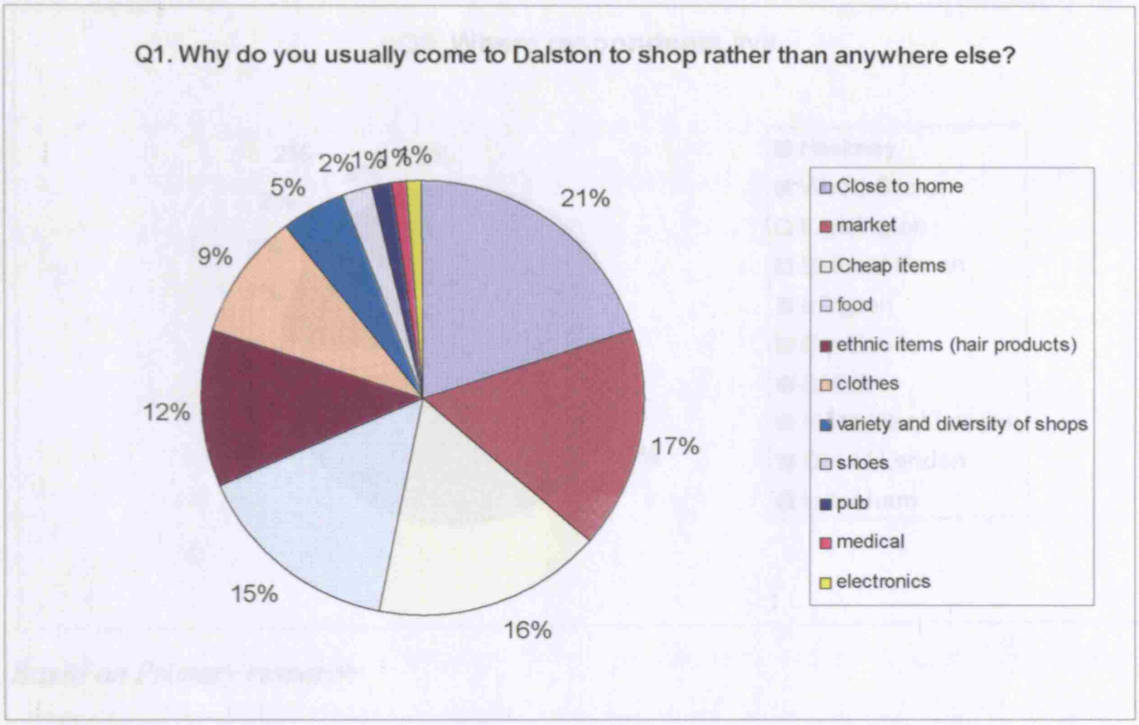
In April 2008, the council undertook a community consultation exercise aimed at informing the early stages of a proposed masterplan for Dalston. 69 people responded to a questionnaire. The exercise revealed the following trends:

When asked what they liked about Dalston town centre, respondents highlighted ...

1. The Ridley Road Market was an important aspect of the town centre (42% of respondents noted this)
2. Diversity and the multi-cultural community are important to local residents (35%).
3. Independent shops were also highlighted as a key aspect of Dalston which respondents liked (17%)

My primary research aimed to further supplement this data in order to gauge how consumers saw Dalston and what they valued about it as a retailing destination. As depicted in Figure 10, customers shop in Dalston because of its proximity to their residence (21%), the market (17% - mainly for food items), and food in general.

Figure 10: Consumer responses – Reasons why customers shop in Dalston

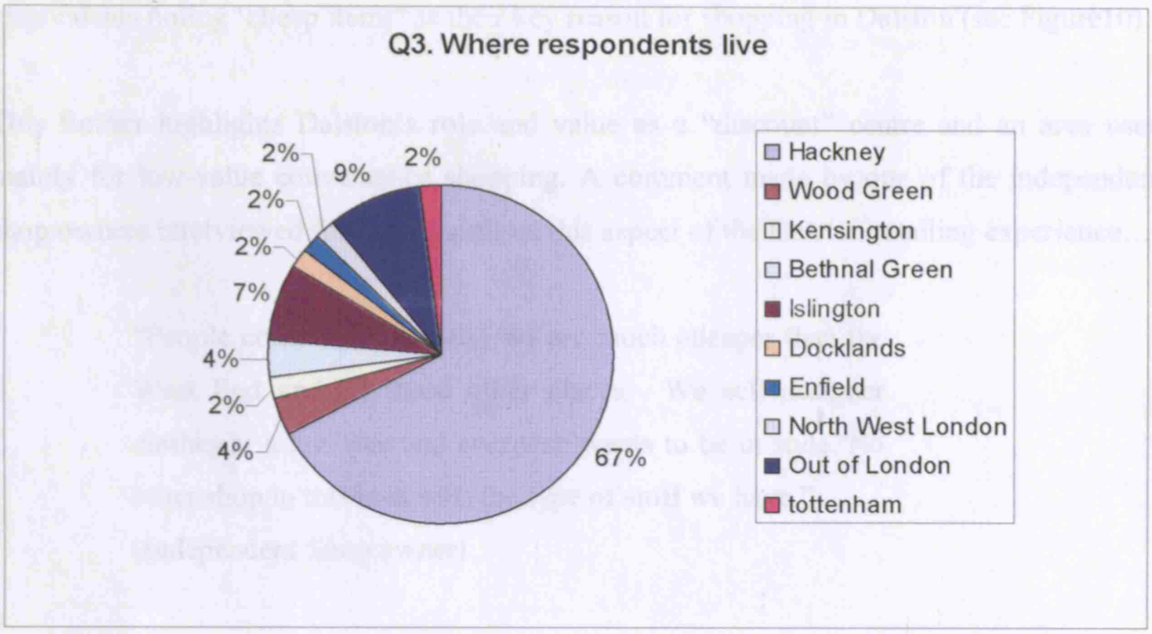


Based on Primary research

Quite a high proportion of persons (12%) indicated that there key reason for shopping in Dalston was because of its specific provision of 'ethnic items'. Further probing revealed that these included African /Caribbean food items, and black hair and beauty products. The responses to my survey in some ways reflect the points highlighted in the council's community consultation exercise though neither the council's consultation exercise nor the work covered in the council's retail study (Tym and partners 2005) focussed any questions on the diversity of goods offered.

The results of my shopper's survey also highlights that Dalston's sphere of influence seems to be quite local, with 67% of respondents hailing from within the borough (see Figure 11). This finding mimics the findings of the council's retail study which noted that Dalston's retail draw was heavily locally skewed.

Figure 11: Shopping survey respondents' places of residence



Based on Primary research

<u>Dalston – a place for bargains</u>

10% of respondents to the council's household survey (Tym and partners 2005a) identified competitive pricing as an important draw to the Dalston shopping area. When asked to rate surrounding shopping areas based on their preferred shopping destination for good prices, consumers voted the Dalston shopping area as first choice (see Table 1).

Table 1: Residents' preferred shopping area for good prices/discounts

	Residents' Preferred Shopping Area for good prices/Discounts (%)			
Shopping Centre	**1st choice**	**2nd choice**	**3rd choice**	**Average of 3 choices**
Dalston/Kingsland	10	27	15	17
Other	9	13	12	11
Mare Street	8	17	10	12
Wood Green	8	29	15	17
West End	3	18	4	8
Angel	3	14	16	11
Total no. of responses	78	214	111	
Total no. of responses (as a % of all responses)	6%	18%	9%	

Based on data from Tym and Partners (2005a)

My shoppers' survey, undertaken 3 years later, still highlights this niche role with 16% of respondents noting 'cheap items' as their key reason for shopping in Dalston (see Figure10).

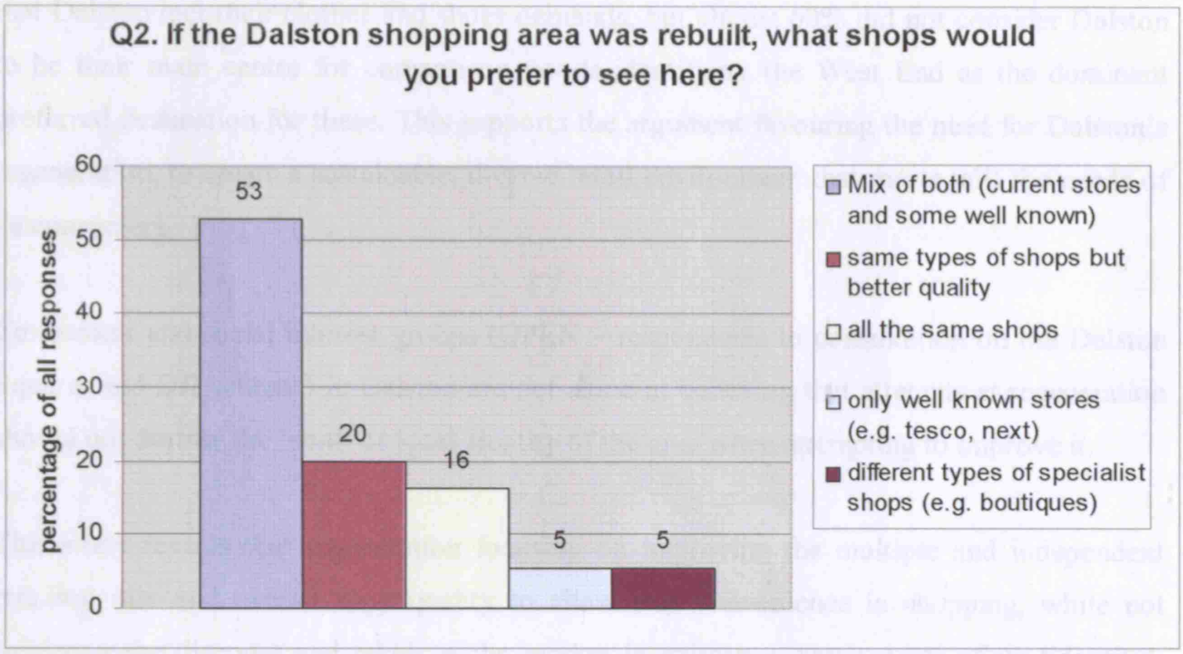
This further highlights Dalston's role and value as a "discount" centre and an area used mainly for low-value convenience shopping. A comment made by one of the independent shop owners interviewed further epitomises this aspect of the Dalston retailing experience...

> "People come to us because we are much cheaper than the West End and all those other places. We sell designer clothes at a low rate and everyone wants to be in style. No other shop in this area sells the type of stuff we have."
> (Independent Shop owner)

Figure 12 depicts customer responses to my survey with regard to preferred retail mix. Given the fictional opportunity to create a town centre that would best meet their needs and desires, most respondents (53%) to my shoppers survey preferred a retail landscape offering a **mix** of both shops similar to what is currently offered (physically independent retailer majority) and more well-known stores (multiples). This indicates that there is some level of customer satisfaction with the current retail offer. These responses correspond with visitor views attained through the Council's visitors' survey (Tym and partners 2005c) which found that a third of all visitors to Dalston thought that the centre needed no improvement, indicating a high level of satisfaction with it.

36% of respondents to my shopper's survey also wished to maintain the existing shop types. Of that group, about 56% ideally wanted the existing shops (independent) to be of better quality instead of wanting multiples to move into the area.

Figure 12: Customer retail preferences



Based on primary research

An assessment of responses to The *Council Community Consultation exercise* (*London Borough of Hackney 2008a)* highlighted the desire for better quality of shops as the third most supported improvement required in the town centre, with many respondents also wanting to preserve the "sense of atmosphere", specifically stating their desire for " no clone town" (*London Borough of Hackney 2008a)*. The full responses to the questions considered for the purposes of this study from the Council's community consultation exercise have been tabulated in the appendices.

Of the respondents to my survey, only 10% wanted a complete change in what was currently offered, with half preferring only well-known (multiple) stores and the other half, desiring independent stores that were entirely different to what is currently offered.

The majority of views however, echo the concerns raised during the public consultation on the Dalston Square and DJI Schemes previously discussed, highlighting the perceived value Dalston's consumers place on what Dalston already offers- its 'local identity' and character strongly influenced by the presence of the independent shops.

The Council's visitors survey (Tym and Partners' 2005) revealed that 40% of visitors found that Dalston met their clothes and shoes demands, but almost 60% did not consider Dalston to be their main centre for comparison goods identifying the West End as the dominant preferred destination for these. This supports the argument favouring the need for Dalston's regeneration, to create a sustainable, diverse retail environment that meets (all) the needs of its consumers.

Consumers and social interest groups (OPEN – respondents to consultation on the Dalston Square and DJI scheme) in Dalston are not alone in believing that attempts at regeneration should not destroy the 'soul' or local identity of the area when attempting to improve it.

This study reveals that regeneration focusing on improving the multiple and independent retailing mix and overall shop quality to allow true convenience in shopping, while not removing the discount and ethnic niche market in existence, key aspects of its 'identity', would ensure that the Dalston of tomorrow would not alienate the current low-income mainly immigrant population of consumers for whom Dalston's retail offer is important.

Experts agree that the retailing industry should both provide for and reflect the social diversity of its customers. Graham Lancaster, Chairman of Euro RSCG Biss Lancaster, a leading retail expert was quoted as saying *"Shopping places will need to become much more in touch with the multicultural world we live in and embrace our rich diversity of language, culture, traditions and religions"* (BCSC 2007). It is especially important in areas undergoing sudden change through regeneration that the projects aim both to ensure the happiness of and cater to the needs of the consumer, in order to avoid the often easily achievable regenerative pitfall – gentrification. The influx of more affluent persons in the residential elements of developments like the Dalston Square project and the increased accessibility of the town centre will naturally create rapid changes in retail plot value which will aid in the further loss of many of the current independent retail shops, unable to afford it.

Spatial Planning as a concept seeks to balance social, economic and environmental concerns. On these bases, it could be argued that the role of retail planning in meeting key government objectives "to promote and enhance existing centres.....enhance community choice...meet the needs of the entire community and particularly socially excluded groups" (ODPM 2005) justifies a planning response to this identified concern.

My analysis of consumer preferences when compared to the revealed approach to retailing provision in regeneration taken by Hackney Council indicates an undervaluing of the social cost such regeneration schemes can have on Dalston. No provisions have been made in regeneration plans to ensure that existing independent retailers, which consumers identify to be important in their social identification of the Dalston shopping environment, are considered or provided for to ensure their continued viability. There is concern that large scale regeneration, following the current approach highlighted by this case study, could potentially damage the niche identity which Dalston has organically developed over the years.

Regeneration attracting inward investment is arguably the most significant means of facilitating economic development, particularly in areas which exhibit limited scope for more locally-based investment opportunities (Paddison 1993). Such investment tends to come from organisations with well thought out centralised economic models, able to react quickly to maximise investment opportunities – usually, the multiples.

Often, such marketing methods are criticised for their strong economic focus which largely overlook any wider societal implications (Paddison 1993). With regeneration efforts guided in principle by such concepts, they are often faced with balancing two different objectives - Serving the "wellbeing of the individual customer and/or that of society at large" (Paddison 1993). This dilemma forms the crux of this discourse...Who do you provide for?

So what's so special about independent retailers?

Independent shop's smaller formats, localised business strategies and lower product turnovers, by comparison to multiples, make them both reflective and dependent on the social and demographic identity of their areas (NEF, 2004 and Coca-Stefaniak, 2005).
Also, although multiple retailers generate greater economic wealth, a much lower proportion of this money benefits the local area than it does with independents. Multiples' centralised approaches also mean that profits are not spent in the local area, and their economic model of low staff numbers and high product turnover mean that fewer jobs are available to local

people with them than with independents (NEF, 2004; Simms, 2007). The socio-economic contributions of Independent retailers to their communities are further detailed in Table 2.

Table 2. Summary of aspects where small independent retailers play an important role

Area	Description
Socio-economic elements	
1. Consumer behaviour	Consumers may still use small independent shops in three instances: _ when it is the only outlet available (mainly rural areas) _ for 'incidental' or emergency purchases (i.e. convenience buying) _ to purchase products otherwise not available elsewhere (e.g. speciality shop)
2. Economic links with businesses	Links with other businesses in terms of services (e.g. legal advice, tax services, etc) and networks. This level of embeddedness has been cited as a reason for small retailers to participate in Town Centre Management schemes
3. Resident community	Contributing to the fabric of communities with a sense of identity and place for their inhabitants by providing an economic 'glue' for local residents.
4. Employment	Small shops can be a 'seed-bed for entrepreneurship' due to low entry barriers and the prevalence of self-employment in this sector.
Sector issues	
5. Diversity of choice	The diversity and 'colour' offered by (mainly specialist) small retailers may result in a competitive advantage for an area in terms of its differentiation from the more standardised retail landscapes of most high streets, especially when the retail provision can be grouped into clusters or strips.
6. Dynamism	Small retailers can provide a test-bed for new retail and product ideas. Their better understanding of the local market and customer service needs can be a potential source of competitive advantage.

Source: adaptation of table from Smith and Sparks (2000)

4.3 THE PLANNING POLICY FRAMEWORK - THE DRIVING FORCE FOR RETAIL CHANGE?

Retail planning's focus on investment and fast economic growth currently impacts on employment patterns as noted above. Guy (2007) critiques the planning system in its treatment of such issues noting that "the balance between 'new jobs' provided by the new development and jobs lost in existing shops affected by trading impact – is not usually considered". He also concludes that the "impact of planning policies on retail innovation and productivity are rarely fully understood by planners" (See Table 3)

Table 3: The impacts of retail development

Category	Negative Impacts	Positive Impacts
Economic	• Loss of trade in existing centres	• Improvement in scale, structure and diversity of centre (where retail development is in-centre)
	• Diversion of retail investment from existing centres	• Employment gains and income multiplier effects
Social	• Increasing disparity in access to retail between social groups	• Improvement of access to retail in areas of social exclusion
Environmental	• Increased vacancy levels and /or poor quality shops and services	• "Planning Gain" associated with proposal
	• Increased traffic	• Remediation of contaminated land
	• Other consequent environmental deterioration	• Visual improvements

Source: Based upon BDP Planning (1992:37-8) in C. Guy (2007)

In considering proposals with an impact on their town centres, local authorities are guided by the national guidance provided in Planning Policy Statement 6 (ODPM 2005). Paragraph 3.4 of PPS6 highlights that in assessing proposals for new retail developments within the town centre, local authorities should consider the scale (amount of floor space provided) and the accessibility of its location. Unlike their out of town counterparts, town centre retail developments are not required to produce impact assessments considering their overall impact on the town centre itself (Tym & Partners, 2005).

Instead, their impacts would be assessed on the basis of the results of the local authorities own evidence base. PPS6 requires that Local Authorities monitor the vitality and viability of their town centres through regular town centre "health checks", which should, amongst other things, monitor the "diversity of main town centre uses" (based on number, type and amount of floor space) and "retailer representation and intentions to change representation" (includes the monitoring of the types of retailers represented and the demand for retailers wanting to enter, exit or change their representation in the centre). The onus is on the Local Authority to undertake and evaluate proposals in light of the results of such checks.

In this context, Hackney Council's approach to the assessed regeneration schemes followed the guidance in PPS6 and in so doing, placed little consideration on the social importance of protecting a balanced retail offer (in respect of provision for independent versus multiple retailer shops).

The guidance however is set to change. Recognition by the government of the need to protect small shops has this year, spawned the production of revised town centre guidance - PPS6, which in July 2008 was published for public consultation. The revised guidance, does propose the incorporation of a more rigorous impact assessment which would require developers to consider "retail diversity, consumer spending, loss of trade, impact on town centre investment and scope for regeneration and job creation, to ensure that central areas are protected against harmful schemes" (Planning 2008).

On a regional level, the newly elected London Mayor (Boris Johnson) has also proposed new planning priorities aimed at ensuring the development of a 'diverse, dynamic retail sector' (GLA2008a). Proposals for better use of Section 106 legal agreements, which is currently heavily used in negotiations between developers and planners in the provision of low cost hosing, to be extended to the retail environment in the provision of affordable small shop spaces.

Whether these proposed changes go far enough to address the issues raised in this study however, is questionable.

5. CONCLUSIONS AND RECOMMENDATIONS

The planning system is charged with the role of balancing social, economic and environmental concerns in guiding the creation of sustainable communities. This study highlights some of the conflicts and conflicting demands around this discourse and questions whether planning goes far enough to achieve this balance in the retailing environment.

Dalston serves a very diverse population but its catchment is small. Previous sections have shown the necessity for regenerating the shopping area, to boost its sphere of influence and therefore its economic viability. However, local consumers believe that the identity and character of this area are unique to it and should be retained. This identity and character are defined at least partially by independent shops, the diverse market, the range of specialist (ethnic) products provided in the centre, the availability of cheap items and the cultural and ethnic mix of people created by this environment. These same consumers want regeneration to provide better quality small stores (independent) and a mix of these with multiples.

The current regeneration efforts in Dalston have already drastically reduced the numbers of independent shops in what has historically been an independent shop haven. The numbers of multiple retailers on the other hand have increased in direct relation to changes in National Planning Policy Guidance policies encouraging 'town-centre first' retail development. This guidance was found to currently lack the scope to preserve a balanced retail provision. Assessment of PPS6 has revealed that it places great emphasis on economic and environmental aspects of retailing but less on "social cohesion and inclusion", "the social fabric of communities" (ODPM 2005a).

Whether these are issues which can be clearly addressed in the context of policy is a question which perhaps requires more consideration. The question of whether or not local authorities should be allowed to discriminate in the interests of encouraging competition and stimulating or maintaining a more balanced retailer make up requires further thought.

In this context, the recommendations put forward with regard to policy making or content will take a broad approach rather than provide definitive reforms. Each recommendation responds to a key issue raised which, although they relate specifically to the case study site, relate to concepts used in planning in the UK as a whole. On this basis, the recommendations can be implemented on a much wider scale.

Recommendation 1:

PPS6 should be reconsidered to incorporate some aspect of competition without causing micromanagement in retail provision. Recognition of the role played by independent retailers should be considered in an attempt to encourage and support more sustainable, balanced retail development. Competition can be considered as a key indicator within the Health checks, particularly with respect to the proportions of independents to multiples.

Recommendation 2:

On-site or off-site relocation of displaced units should be provided perhaps through the use of planning obligations (Section 106 agreements) requiring the developers to consider and provide for them.

Recommendation 3:

Local Authorities should consider implementing town centre management schemes creating partnerships to best communicate all aspects of stakeholder interest and a manager to monitor the health of individual town centres more locally. Town Centre Management Schemes imitate the management model used for shopping centres ((Wells, 1991; Guy, 1994 in Otsuka, Reeve 2007) and provide a tailored approach to management of the economic, physical and social aspects of the "high street". This management structure is based on public/private sector partnerships/collaboration and could provide the impetus and natural surveillance required to ensure that future development better reflects the community, its needs and identity.

Recommendation 4:

As highlighted earlier, Hackney Council is currently creating a master plan for Dalston. This is an opportunity to consider in greater depth, Dalston's identity and what it gains from its current retail offer and mix (independent and multiple provisions). This should be guided by broad consultation distinguishing between the views of independent and multiple retailers as well as consumers, residents and other stakeholders. Planners involved could investigate whether there is a need to re-provide / provide for independent retailers to protect the niche identity of Dalston.

To aid in the protection and enhancement of retail diversity, a zone could be designated within the town centre, strictly for independent retailers. Based on the retailing model used successfully by street markets and shopping centres, by clustering such units together in one area, the area should benefit from economies of scale, ensuring their continued viability.

Future research

- Reconsideration of use-classes and the way that planning assesses retail provisions.
- Use the case study approach to juxtapose different retailing environments in a variety of communities to assess the issues revealed here on a larger scale in order to gain a greater understanding of the relationship between independent stores and their contribution to local identity. The question here would be...If people are deprived of one element or the other (multiples or independent shops), would all the community needs still be met?

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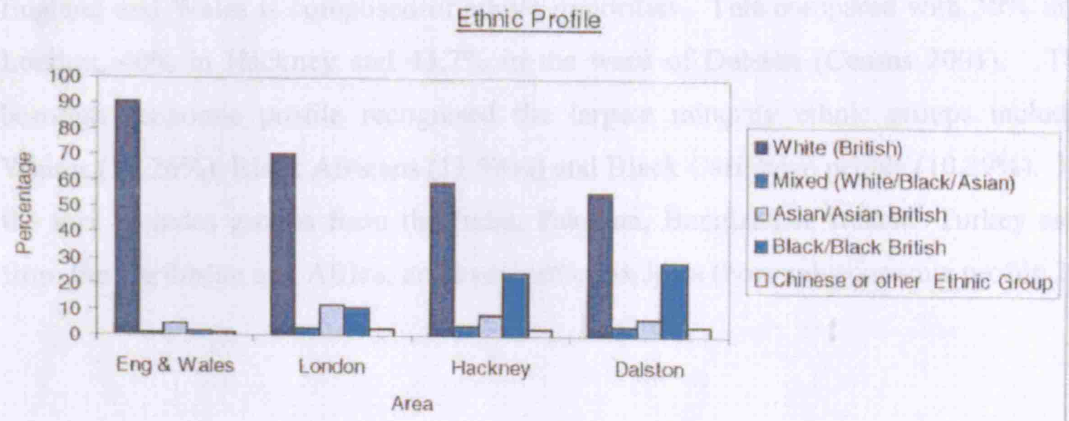
Other Data Sources

- Office of National Statistics: https://www.nomisweb.co.uk
- Focus: www.focusnet.co.uk
- Experian Goad

APPENDICES

Appendix 1: Dalston - A Socio - economic profile

Figure 13: Ethnic Profile of Dalston in context of national and regional Figures



Source: Census 2001

<u>Dalston – a deprived ward</u>

The Index of Deprivation which provides an indication of the level of deprivation of areas, based on analysis of super output areas indicates that the ward of Dalston is composed of 7 Super output Areas (SOAs). The index is a weighted aggregate based on 7 different indicators assessing quality of life. In Dalston, all 7 SOAs fall within the top 20% most deprived areas in England. (Dalston ward profile 2007). Overall, Hackney contains the second highest number of the most deprived SOAs in the country (14%) of any London borough.

Of note among the deprivation indicators, the unemployment level for the borough stood at 11.4%, 6% above the average for Great Britain and 4.6% above the London average.

Historically, the London Borough of Hackney has housed large numbers of working class, immigrant populations (Mander et al.2002 and http://www.Hackney.gov.uk/xp-factsandFigures-history last accessed 12/09/08). Today, Hackney boasts one of the most diverse populations in London, with the most recent census stating that 41% of the populace are of a non-white background, the 6th highest ranking in London.

Dalston's goods and services focus particularly on the needs of the working class Afro-Caribbean, African, Asian, Turkish and Cockney populations of the borough (Mander et al. 2002). In 2001, the Census profiled Dalston in the context of its ethnic profile. 9% of England and Wales is composed of ethnic minorities. This compared with 30% in Greater London, 40% in Hackney and 43.7% in the ward of Dalston (Census 2001). The 2006 borough economic profile recognised the largest minority ethnic groups include Other Whites (12.26%), Black Africans (11.98%) and Black Caribbean people (10.29%). However the mix includes groups from the India, Pakistan, Bangladesh, Ireland, Turkey as well as from the Caribbean and Africa, and even orthodox Jews (borough economic profile 2006).

Appendix 2: Shoppers Questionnaire

1. Why do you usually come to Dalston rather than anywhere else to shop? (First two responses listed)
2. If the shopping area was rebuilt, what shops would you prefer to see here?
    a) The same shops
    b) Same types of shops but better quality
    c) Only well known STORES (e.g. tesco, next)
    d) A mix of BOTH (current and well known stores)
    e) Different types of specialist shops? (Boutiques, clothes stores from other countries)
3. If "C", where would you go to get what you get in Dalston now?
4. Where do you live?
5. Gender
6. Ethnicity

Appendix 3: Responses to Shoppers Questionnaire

Q1. Why do you usually come to Dalston rather than anywhere else to shop?

Reason	No. of Times Mentioned	No. of times mentioned (%)
Close to home	17	20
market	14	16
food	13	15
Cheap items	14	16
clothes	8	9
ethnic items (hair products)	10	12
variety and diversity of shops	4	5
shoes	2	2
pub	1	1
medical	1	1
electronics	1	1
TOTAL	85	

Q2. If the shopping area was rebuilt , what shops would you prefer to see here

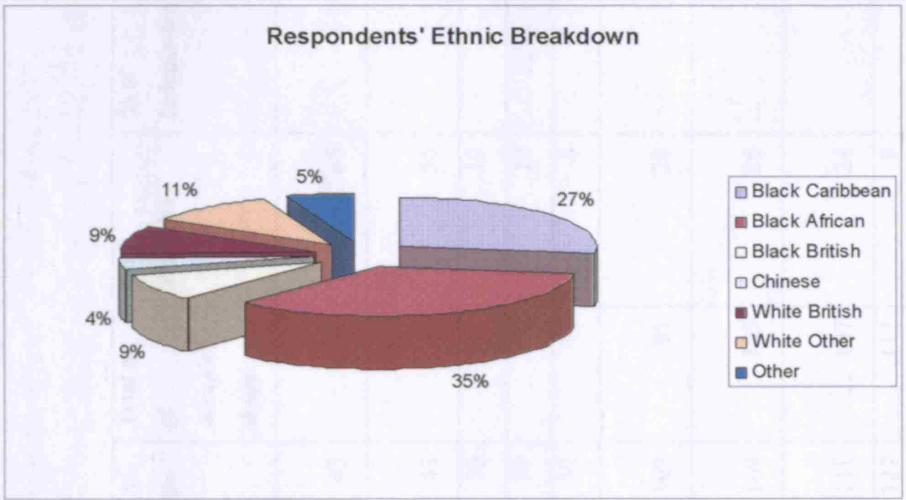
Preferred shops	No. of responses	Percentage
Mix of both (current stores and some well known)	29	53
same types of shops but better quality	11	20
all the same shops	9	16
only well known stores (e.g. tesco. next)	3	5
different types of specialist shops (e.g. boutiques)	3	5
TOTAL no. of responses	55	

Respondents area of residence

	No. of responses	percentage
Hackney	37	67
Wood Green	2	4
Kensington	1	2
Bethnal Green	2	4
Islington	4	7
Docklands	1	2
Enfield	1	2
North West London	1	2
Out of London	5	9
Tottenham	1	2
TOTAL	55	

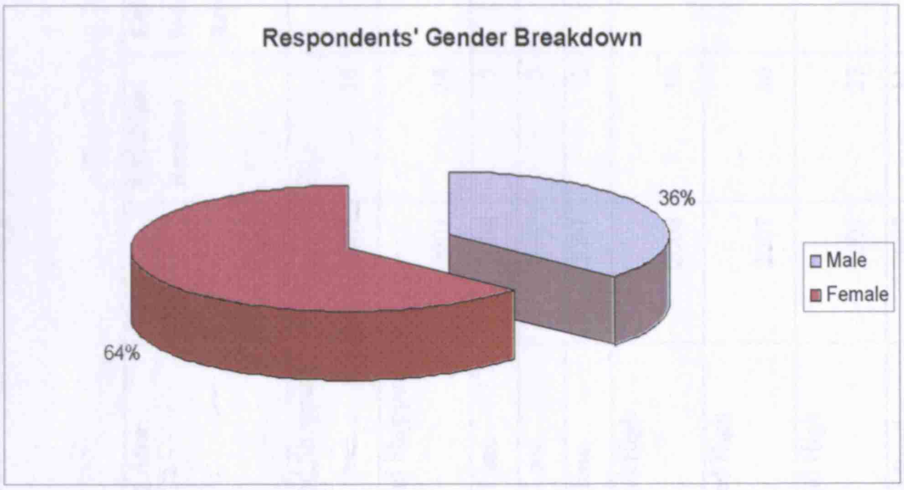
Ethnic Breakdown

Ethnicity	No. of respondents	percentage
Black Caribbean	15	27
Black African	19	35
Black British	5	9
Chinese	2	4
White British	5	9
White Other	6	11
Other	3	5
TOTAL	55	



Gender Breakdown

Gender	No. of respondents	percentage
Male	20	36
Female	35	64
TOTAL	55	



Appendix 4: Dalston Shopping Area retailing analysis - Independent shops vs. multiple

Shopping Area	Year	# Multiple Retailers	# of Independent Retailers	# of vacant shops	Total no. of shops	Total no. of occupied shops	% of Multiples	% of Independents	% Occupied multiple shops	% Occupied independent shops	% vacant shops
Kingsland Shopping centre	2007	26	17	1	43	42	60	40	60	37	2
Kingsland Shopping Centre	2001	24	19	2	43	41	56	44	56	40	5
Dalston Lane	2008	5	45	29	50	21	10	90	10	32	58
Dalston Lane	2007	5	45	16	50	34	10	90	10	58	32
Dalston lane	2001	3	56	18	59	41	5	95	5	64	31
Kingsland High Street	2008	30	79	18	109	91	28	72	28	56	17
Kingsland High Street	2007	30	79	6	109	103	28	72	28	67	6
Kingsland High Street	2001	27	84	4	111	107	24	76	24	72	4
Kingland Road	2007	11	116	15	127	112	9	91	9	80	12
Kingsland Road	2001	10	123	11	133	122	8	92	8	84	8

Source: Personal analysis of Experian Goad Data (2001 and 2007) and personal shopping survey (2008)

Appendix 5: Excerpt from Goad survey spreadsheet for the Dalston shopping area – Surveyed in 2007.

Fascia	Holding Company	Street No	Property	Street	Town	Postcode	Primary Activity	Goad Sub Class	Category	Floor space SqFt	Floor space SqMt	Locality	Secondary Activity	Use Class	Region	Trading Fascia	Multiple Fascia
Dorothy Perkins	Arcadia Group	37 - 38	Kingsland Shopping Centre		Dalston	E8 2LX	Ladies Wear	Comparison	Ladies Wear & Accessories	1700	160	Kingsland High Road		A1	Greater London	Dorothy Perkins	Dorothy Perkins
3 Store	Hutchison 3G UK	4	Kingsland Shopping Centre		Dalston	E8 2LX	Telephones	Comparison	Telephones & Accessories	1100	100	Kingsland High Road		A1	Greater London	3	3 Store
Bright House	Vision Capital	19 - 21	Kingsland Shopping Centre		Dalston	E8 2LX	Furniture	Comparison	Furniture General	2800	260	Kingsland High Road	Electrical & Gas Appliances	A1	Greater London	Bright House	Bright House
H Samuel	Signet	7	Kingsland Shopping Centre		Dalston	E8 2LX	Jeweller	Comparison	Jewellery, Watches & Silver	1500	140	Kingsland High Road		A1	Greater London	H Samuel	H Samuel
5th Avenue	Non Multiple	9	Kingsland Shopping Centre		Dalston	E8 2LX	Ladies Wear	Comparison	Ladies Wear & Accessories	1100	100	Kingsland High Road		A1	Greater London		Non Multiple
Leyland S D M	Leyland S D M	2 - 26		Bentley Road	Dalston	N1 4BY	DIY	Comparison	DIY & Home Improvement	11800	1090	Kingsland High Road		A1	Greater London	Leyland S D M	Leyland S D M

N.B. For presentation purposes, some of the categories usually found in the datasheet have been omitted

Appendix 6: Excerpt from the Community Consultation Exercise undertaken by the London Borough of Hackney in April 2008 to inform early stages of a Dalston Masterplan.

- The exercise was undertaken to find out from the local community, what issues were important and how they would like to see the Masterplan's move forward.

Question 1: What do you like about Dalston town centre?	
Relevant Responses	**Number of Hits**
Ridley Road Market	29
Diverse and multi-cultural community	24
Local character/vibrancy	21
Historic buildings	13
Independent shops	12
Cafes and restaurants	10
Shopping/local amenities	8
Transport links	7
Other - miscellaneous comments	15
Other comments: specific answers	**Number of Hits**
Rio Cinema	4
Overall potential	3
Central location	3
Everything	1
Affordable	1
St Mark's Church	1
Arcola Theatre	1
Library	1
Total Number of respondents	66/69
Question 2: What would you like to change/improve about the town centre?	
Relevant Responses	**Number of Hits**
Safety and security issues - more policing	18
Cleaner/tidier	17
Better quality shops	16
More public/open space	12
Pedestrian space to be improved	8
Improve run down/derelict buildings	7
More trees	6
More parking	5
Better quality cafes	4

Better cycle routes/facilties	4
Improved Gillett Square	4
More art/culture	4
Refurbish historic buildings	4
Other - miscellaneous comments 3	32
Other comments: specific answers	**Number of Hits**
Better transport links	3
Youth centre/activities for young people	3
More kids/families facilities	3
More street lighting	2
Less traffic congestion	2
Better nightlife	2
Connection from market to shopping centre	2
Build modern, design-led buildings	2
Less concrete	1
Improve Dalston Kingsland Station	1
Restoration rather than demolition	1
Discourage prostitution and drug trade	1
Increase town centre residential population	1
Improve Birkbeck Mews	1
Get rid of Ridley Road Market	1
More community involvement in planning	1
Improve market storage area	1
Respect for local ethnicities	1
Height limit to new developments - no high-rise	1
Get rid of Library	1
Ridley Road Market should be improved - Chapel Market in Angel a good example	1
Total Number of respondents	66/69
Question 8: Are there any other comments you would like to make about your town centre?	
Majority Responses	**Number of Hits**
Preserve sense of atmosphere - no clone town	10
Preserve historic buildings - theatre was knocked down previously	9
Sanitisation of Ridley Road Market needs improving and safety at night	6
Safety and security issues esp. at night	5
More facilities for families/children needed	4
Civic identity needed - art/local culture	4
Involve the local people more in consultation (e.g. interactive plans and comments online – one survey is not enough)	4

Balance needed between large and small retail units	3
Other - miscellaneous comments	26
Other comments: specific answers	**Number of Hits**
More parking needed	2
More support/provision needed for artists/cultural community	2
Ensure Dalston Sq safety at night	2
Less traffic congestion needed	2
Town centre needs to offer more variety to local residents	1
More space needed for small local businesses	1
Utilise empty retail units for housing	1
Provide facilities for the community	1
Wine bars and clubs bring problems to the area	1
More provision for new families e.g. schools	1
A bus route link to Stratford	1
New developments should not block views	1
More leisure facilities e.g. gym	1
No gated communities	1
No more betting shops	1
More facilities for disabled and elderly	1
Concern about transient nature of future development	1
Don't push out existing traders	1
Better pedestrian environment needed	1
Public toilets needed	1
Existing library should become a music centre using saved pieces from theatre	1
Sort out squats and derelict housing	1
Total Number of respondents	58/69

Source: *www.Hackney.gov.uk dalston-community-consultation-feedback-and-analysis.pdf -*