

Changing geographies of retail: does the high street have a future?

Rikhil Morjaria

University of Reading

Abstract

The high street is perceived as being at the heart of the community. However increasing pressure from larger shopping centres and online retailers threaten high streets and are seen to be behind a recent decline of traditional retail spaces. This report evaluates the methods that councils and other economic development organisations are using to promote traditional high street retail environments. It focuses on two important time periods in the retail calendar, Christmas and Black Friday 2014. Fieldwork was conducted in 15 town centres in South East England, which included interviews with town centre managers and planners as well as observations of promotional events and activities. I found that involving the community in events and initiatives is an important way to add vitality back to the high street however more needs to be done on a national level in the form of cutting business rates and amending planning policy. Whilst the threat from online retailers can have detrimental effects on the high street, this can be minimised by using the Internet alongside physical retail stores and offering more than just a basic service to increase customer satisfaction. Significantly retailers must adapt to changing environments and meet customer's needs by meeting their aspirations from retail shopping.

Keywords: Economic Geography, Black Friday, High Street, Online retailing, Retail, Town Centre

Introduction

In the UK retail methods have been constantly changing since the mid-1960s aiding consumption (Thomas, Bromley and Tallon, 2004). Alternative methods have risen from the growth of households with a car and the rise in large scale shopping environments such as superstores and out of town retail parks. Planning policies that favour shopping centre developments have been identified as a serious threat to high street retailers as they deter consumers away from the high street stores and have a negative implication on the community (Gransby, 1988). Due to on-going pressures from the Internet and other methods of shopping, the high street needs to “increase the value they provide to the customer” and shopping events and promotional initiatives are a key way of engaging consumers with independent retail stores and the traditional high street (Kumar, 1997; 4).

To inject vitality back to the high street, it is argued that focusing on creating a social space rather than a “retail attractor” aids progression to minimise the impact from threats to physical retail stores (Griffiths et al., 2013; 2). Town centres will benefit from finding a way to alter the image of high streets to make it a more attractive retail space and reports such as by Portas (2011) lay out a series of recommendations to make the high streets more appealing to consumers. Using case study examples, this

study will predominately be looking at the effectiveness of these initiatives on local high streets and the implications for retailers.

Literature Review

2.1 Threats to the high street

Dawson (1998) refers to the high street as an entity that we maintain for nostalgic reasons however we still keep despite the changes. Furthermore it is suggested that high streets “are losing individuality” (Dawson, 1998; 3). Jackson (1998) suggests that shoppers are deterred from high streets due to crime and beggars and that you are six times more likely to be affected by this compared to a shopping mall. The shopping experience is one that is critically examined, and it has been studied that consumers still value the face-to-face assistance from store staff, the ability to see and touch a product before they purchase and the overall “social interaction” that retail stores offer (Kim and Kang, 1997; 6). The expectations of consumers are consistently changing and retailers need to respond and meet their needs.

The growth of technology and use of the Internet has given rise to online shopping and the development of e-commerce. Weltevreden (2007) discusses the use of the Internet in retail, has the potential to alter shopping methods and in 2005 online shopping contributed to 3.1% of total expenditure in retail. However the Internet also has the means to complement shopping in store through consumers searching for goods online and then going in-store to purchase. The growth of e-retailing will lead to the need for continuous investment to the high street for “constant renovation and reinvention to remain attractive” (Burt and Sparks, 2003; 9). The advantages of online shopping are accessibility, direct communications, cost savings and new markets (Doherty, Ellis-Chadwick and Hart, 1999) and whilst the social experience of shopping in physical stores cannot be replaced, the threats described, “cannot be readily ignored” (Doherty, Ellis-Chadwick and Hart, 1999; 4).

2.2 The Portas review

The Portas review was an independent report published in 2011 to discuss the decline of high street shopping over the past few years. The review aimed to set out a structure that would give the “high street a fighting chance” and discusses a series of 28 recommendations that she suggests will help to establish growth for high street shopping (Portas, 2011; 4). Out of the 28 recommendations, business rates was one that was seen to be the most significant due to their high expense and can contribute a high percentage of a retailers costs (DCLG, 2013). There was an emphasis on modelling the high street around the changes in consumers’ preferences and adaptation was key.

While the review has emphasised the need for change, only 12 town centres were selected to receive government funding as ‘Portas Pilot towns.’ The aim of a Portas Pilot town was to re-image the town centre in order to enable an increase in retail shopping on the high street. In a BBC report that looked at the initial success of the Portas Pilot town scheme a year after The Portas Review was published, in 7 of the towns shop vacancies had decreased however overall the number of shops that have closed increased. In 10 of the government funded towns, had an overall fall in the

number of occupied retail units with more units closing than opening. Only 2 towns showed progress a year after the initiatives discussed in the review were enacted (Fenwick and Browning, 2013).

In July 2012, there was an increase in the number of towns that would be funded by the Portas Pilot’s scheme bringing the total to 24 (Tripline, 2014). In April 2014, changes were made to business rates that lead to greater support for small businesses in the form of a discount. Parking enforcement was relaxed in town centre areas on a case-by-case basis. Key local stakeholders were given a greater say in their town centres and there is an emphasis on local leadership. Greater support was given to local markets through a national campaign in May 2014. Finally there was a reduction in the red tape for planning (through easily allowing the operation of ‘pop-up’ stores), which allows for development in town centres easily (Gov.uk, 2012).

2.3 Future of the high street

From the evidence, it is suggested that consumers want an “engaging experience” when they go shopping (Niehm et al., 2007). Using evidence from a study in Singapore, Ibrahim and Wee (2003) researched the creating a shopping experience as a means to satisfy consumers. Figure 1 shows the conclusions from their study and the factors that contribute to a positive shopping experience. It shows that to create a ‘shopping experience’ that retailers need to comprehend what customers want to feel when they shop in store (and potentially detract from online shopping). Figure 1 also shows the importance of transport links to maximise comfort and how the retail space can include ‘value-added features.’

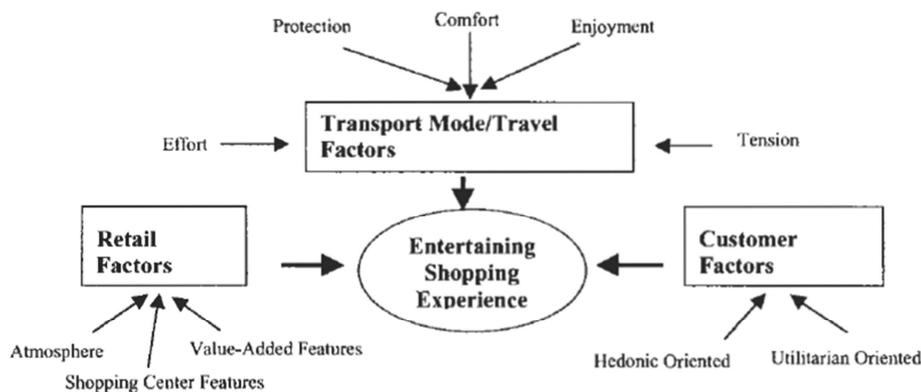


Figure 1: Model showing an entertaining shopping experience (Ibrahim and Wee, 2003; 22)

Kang and Kim (1999) also discuss the positive role of entertainment in a shopping environment in response from competition from new retailing methods. Thomas and Bromley (2002) identify a spiral of decline for retail in small towns and this has resulted from the emergence of superstores and threats from shopping centres. In addition it is stated that development in retailing methods has lead to loss of the social aspect for the community however there is a need to maintain the “vitality and viability of traditional town centres” (Thomas and Bromley 2002; 25). The vitality and viability of town centres is an important concept when considering the future of the high street as it signifies the extent to which a town centre is busy and viability signifies the level of investment that comes in.

Whilst retail shopping on the high street is a key factor in bringing an increased footfall to a town centre, there is an importance of offering more than just a shopping environment for consumers and entertainment can add significant value to the “commercial viability” to help sustain the high street (Page and Hardyman, 1996; 2). The decline of town centres can have an added impact on employment, the appeal to the area, and the competition of prices.

Methodology

The main aim of this study is to investigate the effectiveness of the recommendations set out by Portas and if this has enhanced the high street. Data was collected over a 2-month period with Black Friday and Christmas 2014 as the chosen case studies. The area of study selected was the towns and cities in the Home Counties.

Black Friday is the day after Thanksgiving and is considered a significant shopping event in the United States. Many retailers host extended shopping hours and promotional offers during the day. The increase in online shopping has allowed Black Friday to become a phenomenon globally.

Interviews were conducted with town centre managers, managers of bid projects, marketing managers for shopping centres and members of local councils. This was done to gain a better understanding of the decision-making process for promotional activities and if there was a perceived benefit to retail stores. Table 1 shows which town centres interviews were obtained from.

	<u>Town Centre</u>	<u>County</u>	<u>Identifier</u>	<u>Organisation</u>	<u>Role</u>	<u>Date</u>	<u>Methodological Notes</u>
1	Basingstoke	Hampshire	I1	Destination Basingstoke	Administrator	January 2015	Phone interview
2	Canterbury	Kent	I2	Canterbury BID	Administrator	January 2015	Phone interview
3	Colchester	Essex	I3	Colchester Borough Council	Council Official	January 2015	Phone interview
4	Crawley	West Sussex	I4	Crawley Borough Council	Local Economy Manager	January 2015	Phone interview
5	Dorchester	Dorset	I5	Dorchester Town Centre	Town Clerk	January 2015	Email Interview
6	Eastbourne	East Sussex	I6	Eastbourne Town Centre	Administrator	January 2015	Phone interview
7	Guildford	Surrey	I7	Experience Guildford	General Manager	January 2015	Phone interview
8	Luton	Bedfordshire	I8	The Mall	Marketing Manager	January 2015	Phone interview
9	Maidstone	Kent	I9	Local Council	Council Official	January 2015	Email Interview
10	Reading	Berkshire	I10	Reading CIC	Communications Manager	December 2014	Email Interview
11	Watford	Hertfordshire	I11	Watford Council	Town Centre Manager	December 2014	Phone interview

Table 1: Table showing a list of interviews conducted and identifiers that will be used within the study

An observation study was carried out in Reading to examine the promotional activities during Black Friday and witness if there was an impact. Furthermore in-store sales were compared with online sales to see if there was a difference. During the Christmas period an observation study was undertaken to identify the activities that were taking place in the town, noticing if there was a perceived effect on footfall and any other general observations of the effect of ways to promote the high street to consumers. During the observation study, identified any changes in the town centre (e.g. parking initiatives or pop-up stalls) and examining any other ways of attracting consumers to the town. Table 2 shows which town centres an observation study took place in and compares this to the town centres where interviews took place.

<u>Home County</u>	<u>Town Centre</u>	<u>Interview</u>	<u>Observation Study</u>
Bedfordshire	Luton	X	
Berkshire	Reading	X	X
Buckinghamshire	Milton Keynes	X	
Essex	Colchester	X	
Hampshire	Basingstoke	X	
Hertfordshire	Watford	X	X
Kent	Canterbury	X	
	Maidstone	X	
	Rochester		X
Middlesex	Wembley		X
Oxfordshire	Bicester		X
Surrey	Guildford	X	
West Sussex	Crawley	X	
East Sussex	Eastbourne	X	
Greater London	West End		X
(Dorset)	Dorchester	X	

Table 2: Table showing which studies were conducted at each town centre

Results & Discussion

4.1 Opinions of the Portas Review

Interviews conducted inferred a very mixed response over the Portas review. “Good ideas however cost to independent retailers” (I1, 2015) “solutions are in local engagement and ownership” (I2, 2015). Many town and city centres have formed a Business Improvement District in response to the review for example in Canterbury and during the interview stated they have seen a difference on the high street (I2, 2015). One of the most significant factors that have been established as an outcome of the Portas report is the need for business rates on the high street to be fairer. In recent national government policy business rates have been tackled however high street retailers still believe more could be done in reducing rates. From interviews

conducted, it has been found that business rates comprise of a high percentage of costs for retailers. By reducing these rates would allow retailers to keep prices steady for consumers and focus on the customers needs than covering costs.

Whilst the recommendations in the Portas review were welcomed and accepted by many of the town centres, they believed that more had to be achieved on a national level through business rates and planning policy to make a significant difference to retailers on the high street. Dobson (2012), stresses the importance of independent retailers in the economy and despite changes by the UK government, planning policy still remains an issue with large superstores taking dominance. Whilst the Portas review discusses the need for funding to aid the promotion of high streets, from the evidence collected there is a theme that town centres are resorting to involving the local community instead in the form of choirs and bands. This is not only a cheaper option however it is also one that encourages community spirit and involvement further providing vitality into the town centre. Literature by Clarke, Kirkup and Oppewal (2012), supports the recommendations of the Portas review and discusses the importance of town centre management and evidence was seen in several town centres where this idea had been taken up. Town centre management allowed retailers to have a greater voice in the decision making process for initiatives and events for the high street and more involved in the schemes that would help to increase footfall. Whilst many of the interviewees agreed that online shopping was a threat, very much like Portas (2011) they suggested that there were other factors that were having a greater impact on independent retailers (as previously highlighted). As part of her recommendations Portas (2011) encouraged the high street to create a dynamic mix and this has been seen in Watford where they are currently undergoing a development involving new entertainment facilities. The Portas review is perceived to be an ideal starting point, to aid town centres to provide regeneration back to the high streets.

4.2 Creating a shopping Environment

From the data collected, it was evident that promotional activities during the Christmas period are still used in attracting consumers to the high street. Table 3 shows a summary of the events held in the town centres in each of the Home Counties. For high streets, activities and initiatives that help to promote the town centre during particular periods is a method of creating a shopping experience. In turn this will help to attract consumers and create a buzz in the area, giving the high street sustainability.

<u>Town Centre</u>	<u>Late Night shopping</u>	<u>Carol Singers</u>	<u>Christmas event</u>	<u>Dancers</u>	<u>Charity</u>	<u>Christmas lights</u>	<u>Gift Wrapping</u>	<u>Choirs/Orchestra</u>	<u>Fireworks</u>	<u>Parking Initiatives</u>	<u>Santas Grotto/Characters</u>	<u>Market</u>
Basingstoke	x	x	x	x	x							
Bicester						x				x		
Canterbury						x		x				
Colchester			x			x						
Crawley			x			x		x	x	x		
Dorchester						x						
Eastbourne			x		x		x				x	
Guildford			x			x				x		x
Luton	x	x	x		x	x	x				x	
Maidstone												
Milton Keynes												
Reading		x	x		x	x			x	x	x	x
Rochester			x		x	x		x				
Watford	x				x	x	x			x	x	
Wembley	x											
West End	x	x	x		x	x						x

Table 3: Table showing the Christmas events held in town centres

One general outcome from the interviews across many of the town centres, is that money is limited (e.g. in Basingstoke) to offer free events and promote Christmas and activities have scaled in comparison to previous years. In Maidstone, due to budget constraints they didn't hold a Christmas campaign in the town centre and "instead left it up to the shopping centres" (I8, 2015). In Watford, their ideas however came from a cultural leaders group, which is a variety of stakeholders that have an influence over the way in which the town centre is managed. Making decisions in a consortium together with retailers is a common theme and this was found in Colchester where a one-off Christmas event was held. At the council they believed that there was a feel good factor attached to promoting the high street and was a way to encourage consumer spending.

Christmas in general can be considered a boom period for the high street, however with the development of shopping methods has led to increased competition amongst different types of retailing. Except in the case of Maidstone as they decided to hold no Christmas initiatives or events, it is clear that the high street managers and councils still value the high street as a viable and significant shopping method due to them spending money on these events discussed with many spanning over the whole festive period. The report by Portas (2011) identified that people's expectations when they shop, are changing over time and that the high street has to meet these new expectations to continue to thrive. Council officials and town centre managers identify the need to arrange attractions to bring in the mix of people associated with families and children and this supports the concept by Gregson and Lowe (1994) stating that the differences in shopping methods differs by different classes. Fyfe (1998) examines the experience of going shopping and the importance of enhancing people's perceptions of the high street and physical shopping in general. From the data collection, there is evidence that retailers have attempted to enhance the experience for consumers through the use of initiatives such as Christmas lights, choirs and festival food stalls. In the case of Reading the marketing campaigns that take place during this time "generally do create some extra footfall" (I10, 2014). Fyfe (1998) continues on to explain how the high street is becoming more of an informal scene and with street events as a key method of attracting passing consumers is an evident way to add vibrancy to the high street.

From the observation study and witnessing the general impact of initiatives over the Christmas period there is reasoning for argument that they have an influence on footfall on the high street. In Watford, the local market had moved from a segregated area near the Intu Watford shopping centre to on the main high street. Even the council believed that the "relocation of the market had a positive influence on footfall" (I11, 2014). By hosting the local market on the main high street, this counteracts with Dawson (1998) as this demonstrates how independent retailers can still have predominant standing in physical retail methods. The market can be viewed as a nostalgic shopping method by associating this with the high street and the significant increase in footfall witnessed shows that in this scenario the market proved to be a method of adding vitality to the high street. Jackson (1998) discusses how the negative impression of the high street can push consumers towards shopping centres due to crime and beggars, however from research in Watford suggests that the council are marketing the high street towards a more family friendly environment with the

market and events that target children. The evidence of creating a safe environment has the means to give confidence back to consumers and encourage shopping on the high street. This safe environment enhances the shopping experience and this has been a predominant outcome through the research.

4.3 Effectiveness of Black Friday on the High Street

Many retailers found Black Friday as a pivotal moment in the start of their Christmas shopping period with a representative from Luton stating, “it was the start of the Christmas shopping period” (I8, 2015). In shopping centres, the perceived impact was far greater, with queues from 2am and The Mall in Luton opening from 4am to allow some of the larger stores to begin opening their stores early and leading to a rise in footfall.

During the observation study in Reading, there was a lot more offers in The Oracle shopping centre compared to the high street. The majority of the major retailers held a sale during Black Friday including those that didn’t publicise this nationally such as Hollister or Bank Fashion. The value of the sale varied between 10% and 50% in store and generally the shops weren’t as busy as expected just through observing. Looking at the high street, there was clearly an increased footfall than there normally would be. In addition in practically all cases, the sales in stores mirrored the sales online except for Game that kept online and in-store sales separate. This year sales were up by 22% compared to last year and this shows a greater impact of Black Friday this year (BBC News, 2014).

Due to Black Friday generally being restricted to a 24-hour sale period, many consumers resort to online shopping due to the convenience and to avoid the long queues. Many of the online sales started at midnight and lasted over the weekend in comparison to in-store where majority of stores in Reading held sales only for the day. Spring-board.info (2015), found that due to Black Friday, the Christmas footfall had shifted from December to November with the rate of change increasing by 9.4%, which was an increase from the previous year (3.5% growth). Shopping online can’t be underestimated and in particular literature such as Hart, Doherty and Ellis-Chadwick (2000) explores the convenience for e retailing, which is backed in the observation study where stores such as Next and Schuh used online shopping to support their stores.

The literature concludes that retailers need to capture consumers and entice them to stay longer in stores, and this can be through discounts and incentives (Boyd Thomas and Peters, 2011). This concept links back to the initiatives that were run over the Christmas period that help to attract consumers to the high street.

4.4 Impact of Christmas led activities on the high street

Majority of the town centres that I spoke to, believed that the promotional activities in place over the festive period attracted a greater footfall to the high streets. In Canterbury, they recognised a 10% increase in December and believed that the Christmas lights contributed to this growth (I2, 2015). In Colchester, they found that consumers felt good about being in the town centre through the added atmosphere and the festive lights had a significant impact. Creating an atmosphere in the high street

seems to be beneficial and can lead to a busier period for the retailers than normal with footfall increasing drastically. Some activities such as the half marathon in Basingstoke however, had a different objective than increasing footfall and was used as a means to raise money for charity. However in Basingstoke they found that whilst the footfall increased, many didn't spend as much money as was anticipated. In Luton, there was a greater perception that the initiatives to create a "greater experience for consumers" had a positive impact on independent retailers (18, 2015).

It is perceived that Christmas will always bring a higher footfall to town centres due to the increase in demand for consuming, however the success of Christmas on retailers does vary. The initiatives in place (such as the grotto, or food stalls) gave consumers that feeling that they were gaining more out of the experience as they weren't just going to the high street to shop. The attractions for Christmas created a positive festive feeling around the town centre and allowed for the public to feel they were benefiting particularly if the event was free. This correlates with Kim and Kang (1997) who state that shoppers want to feel "a return on the investment of time" and this can be witnessed when people can visit the high street and benefit from the local events at the same time. One of the most recognised outcomes from the study over Christmas was the involvement of the local community. In examples such as in Basingstoke local choirs performed at the high street Christmas event. Whilst it may be perceived that this was simply a money saving idea it can also further satisfy the public if they know locals are performing and increase footfall further to the area on that day due to local people that want to support the community. During the festive period community spirit can be valued as a key identity and is a positive way to attract consumers to the high street. This way of considering the community in the high street is reinforced In Allies and Morrison Urban Practitioners (2013) and as well as the high street being referred to as way to identify the community it can also represent a social space to gather and a bring everyone together. That feeling of using local groups in Christmas initiatives is becoming evermore popular due to the low costs of providing entertainment and the support chain they bring.

Conclusion

The literature heavily suggests that the high street is continually under threat and that retailers need to adapt to offer greater convenience for consumers. This was shown through using the Internet as a compliment to physical stores with many advertising 'click and collect' or in-store returns and this suggests a greater convenience for consumers (Weltevreden, 2007). Furthermore creating an experience in the town centre was deemed as a pull factor to reinvigorate the high street and sustain growth. In general the events and initiatives that took place in town centres over the Christmas period were a key determinant in bringing an increased footfall to the high street.

Events held over the festive period ranged from basic Christmas lighting around the high street and carol singers to Santa's grotto and themed stalls. Involving the local community in these kind of events was deemed important in bringing a positive festive spirit however also is a way of cutting costs on entertainment. The focus of events and activities during the festive period can be viewed as creating a further experience for the shoppers and this supports literature that infers this. Black Friday is

another recent initiative that has caught on from United States and can be signified as the start of the Christmas shopping period. Many retailers who participated in this Black Friday sales, witnessed an influx of extra customers and benefited from the national media coverage on this event. However whilst this can bring an increased footfall for stores during the end of November, it was mentioned that it could deter shoppers after the Christmas period.

Whilst some of the recommendations by Portas (2011) could be considered unsuitable, after speaking to councils and organisations, it was established that the Portas review was a good starting point for high street development and can be considered as a way to boost localism by giving the community a greater voice in managing their town centre. The review was widely accepted however two key recommendations were identified by retailers as significant – reduction in business rates and altering planning policy. It was stated that by acting upon these two policies alone from a governmental alone would benefit high street retailers and give them a fighting chance. In many of the case study examples there was an appointed town centre or local economy manager whose role is the look into sustaining the future for the high street and evidently the local councils still value the high street as a significant shopping method. The government has evidently seen the imperative nature to support high streets and funding has been given through the Portas Pilots scheme and changes over business rates and planning policy have been put in place however from interviews conducted that is still not enough.

From the research conducted there is evidence to suggest that the high street is sustainable with the correct management and adaptations. Input is required by varying stakeholders (such as governments, local councils and centre managers) to achieve the conditions for a vibrant high street. Furthermore the high street suffers from high costs and lacking resources, with the correct support (especially for independent retailers) can help the high street to thrive and meet the recommendations as set out by Portas.

Author Profile

Rikhil Morjaria graduated in 2015 with an Upper Second-Class honours degree in Geography and Economics from The University of Reading. This research was carried out as part of the final assessment for this degree and modified the year after, specifically for GEOverse.

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