
Planning guidance and large-store development in the United Kingdom: the search for ‘flexibility’

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Abstract. An important feature of town-planning practice in Western Europe has been the attempt to control commercial-property development in order to conform with planning principles. The growth history of large stores such as hypermarkets, superstores, and retail warehouses has thus been characterised by disputes between developers and planners. In this paper we examine the responses of large-store developers to UK government planning guidance that retail developments should be of a nature and scale suited to the physical environment of town centres. This goes against some retailers’ preferences for large formats which are generally unsuited to town centres. We explain these two opposed views, devoting particular attention to the retail developers’ case. We then use findings from two interview surveys with selected retailers to explore how far retail developers are prepared to go in compromising their preferred models of store development in line with government policy. Finally we discuss potential effects of recent changes in government policy.

1 Introduction

The events and views discussed in this paper relate to a fundamental issue in land-use planning: tension between the objectives of property developers and of planners. Property developers seek to maximise the return on their investment, which inevitably leads to a search for economies of scale and/or savings in development costs. Planners seek to influence patterns of development in order to achieve wider goals in what they consider to be the public interest. In almost all of Western Europe, there exists legal authority for planning control over property development, ranging from outright bans on development of certain types in certain places, to more-complex systems in which the appearance and site layout of particular developments are negotiated according to a mixture of formal and informal rules (Williams, 1996). The planning system in the United Kingdom falls into the latter category, in its lack of rigid zoning systems, wide-ranging but imprecise policies in development plans, and reliance on long-established concepts such as ‘amenity’ and ‘convenience’ in the control of development (Booth, 2003; Cullingworth and Nadin, 2002, chapter 5).

Partly as a result, central government in the United Kingdom plays an important role in establishing general guidelines for the control of property development, in order to ensure consistency between local authorities in their decisions, and to ensure that other elements of government policy are carried out. Central government’s policies for the content of development plans and for the control of development are set out, in the United Kingdom, in ‘guidance’ notes or ‘statements’ of policy. The best known of these are the Planning Policy Guidance (PPG) series issued in England by the Department of the Environment and its successor ministries. These are now gradually being replaced by Planning Policy Statements (PPS). PPGs and PPSs, and their equivalents in Wales

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and Scotland, are supplemented by occasional 'ministerial statements' made in Parliament or elsewhere, which update or 'clarify' the government's policy in particular respects. Eventually these modifications are incorporated into revised policy guidance or statements.

The tension between private-sector property interests and the wider 'public interest', as defined in government statements, is exemplified in the relationship between parts of the retail industry and the planning system. The search for economies of scale and cost savings has led the industry into developing 'large-format stores', particularly hypermarkets and superstores, which in their pure form, concede little to town planning concepts such as visual amenity or good neighbourliness. In addition, the locations preferred by retailers tend to lie outside existing town and district centres, which planners would regard as more suited to retail development. As elsewhere in Western Europe (Davies, 1995; Evers, 2004; Guy, 1998a; Péron, 2001), retail planning in the United Kingdom has therefore been characterised by disputes between large-store developers and local-authority planners, with central government assuming the role of advisor to both sides as to what might form acceptable compromise in terms of physical appearance and location (Guy, 1994; 1998b; Ruston, 1999). However, central government's stance as a mediator has altered, from a position in the 1980s which many commentators claimed was broadly pro-developer, to the current position in which some advantages of large-store formats are still recognised, but these are subordinated to broader planning principles in the decision calculus (Guy and Bennison, 2002; Wrigley, 1998).

This change in governmental attitude to large-format stores can be traced back to the introduction of 'sustainable development' as a major planning goal in the early 1990s (Owens and Cowell, 2001). Concern over the 'unsustainable' nature of superstores and retail warehouses, which relied almost entirely on private-car travel by customers, coupled with concern over the trading impact of these stores upon town centres, led to policies which specified that town centres should be the preferred location for all types of retail development (Bromley and Thomas, 1993; DoE, 1996; England, 2000). Since 1996, these policies have been reinforced, with the effect that the superstore-development industry finds it increasingly difficult to develop according to their preferred format and location.

Discussion of policy guidance or statements amongst planning researchers tends to focus on their changing content, and their implications for development planning (for example, Harris, 2001; Harris and Thomas, 2004; Tewdwr-Jones, 1997). There has however been little academic research on the private sector's attitudes towards government-policy guidance and advice, recalling the statement that "Research within planning has not produced the necessary research findings for planners to build up a bank of expertise on the impacts of different policies or applications of policy ... Major research studies in planning journals of the impacts of retail change ... are missing from the literature" (Findlay and Sparks, 2005, page 13). Although it is clear from many instances in the practitioner literature that developers are aware of government policy both broadly and in some detailed respects, it is less clear to what extent developers have been willing to tailor their proposals to meet government 'advice'.

In this paper we develop this theme through an examination of the response of the superstore industry to increasingly severe government regulation. In order to reinforce the overall policy to focus new retail and leisure development in town centres as embodied in PPG6 (DoE, 1996), and its successor PPS6 (ODPM, 2005a), central government's advice to retail developers is to be 'flexible': developments should be of a nature and scale which is suited to the physical environment of town centres. Although several major developers specialise in town-centre schemes, others (including some retailers) prefer to develop large-format retail units which are generally unsuited to town centres. Thus there is a conflict between government policy and the preferences of

retail developers. In this paper we explain these two opposed views, devoting particular attention to the case of retail developers, which has been underreported in the recent academic and practitioner literature. We then examine evidence of recent development trends, with the view of determining the effects of the search for 'flexibility'. We explore how far retail developers are prepared to go in compromising their preferred models of store development in line with government policy. Our information is drawn mainly from interviews with representatives of major UK retailers.

In section 2 we explain how UK government policy which encourages 'flexibility' in retail development has changed in the last few years. In section 3 we examine the requirements of large-store developers, and explain why off-centre locations are favoured. In section 4 we examine the extent to which large-store developers have been able to compromise with planning policy, through developing smaller stores and/or developing in town-centre locations. In this section we draw upon questionnaire and interview material gained from two surveys of selected large-store retailers, property developers, and property consultants. In section 5 we examine current development trends involving use of smaller formats and/or central locations, using our interview findings as well as material drawn from the practitioner literature, and in section 6 we draw some wider conclusions.

2 Planning policies for 'flexibility' in retail-store development

In this section we review government policy, since 1996, for retail planning, especially where this concerns the activities of large-format-store developers. These stores include large food stores, usually termed 'superstores', and nonfood, usually termed 'retail warehouses'. These stores are designed for customers to purchase routine or household items in a functional environment which emphasises low prices and convenience (Birkin et al, 2002, chapter 3; Guy, 1994, chapter 7). It is shown that an initial recognition of the advantages of large-format stores was overtaken by an insistence that developers should adapt their product to fit in with the overriding principle of retail development being focused on town centres. Recently, however, new government advice has confused the issue.

In England, the main source of government advice to local authorities and retail developers, at the time of our interviews, was PPG6. This was first introduced as national planning guidance in 1988, and was most recently revised in 1996 (DoE, 1996). Scotland and Wales operate their own planning guidance, which is similar to English policy (Scottish Office, 1998; Welsh Office, 2002).

PPG6 was intended to "sustain and enhance the vitality and viability of town centres" (DoE, 1996, paragraph 1.1), through a combination of encouraging growth and improvement in town and district centres, and restrictions on retail development outside town centres (see table 1, over). It introduced the 'sequential approach', which aimed to minimise out-of-centre development and enhance the vitality and viability of town centres, by directing retail and leisure developments into town and district centres, provided that sites for such development were 'suitable' and 'available'. This policy applied both to local authorities, when selecting sites for new retail or leisure development in their development plans, and to private-sector developers and retailers seeking planning consent for new development.

In PPG6, policy for development of large new stores was unclear. On the one hand, the need for off-centre sites for certain types of retailing was acknowledged. On the other hand, developers were advised to tailor their proposals so that they could be built in a town centre or edge-of-centre location. This led to confusion amongst both planners and retail developers over interpretation of the sequential approach (CB Hillier Parker and Cardiff University, 2004, chapter 2).

Table 1. Retail planning policy guidance and modifications, 1996–2005.

Policy	Date	Source	Relevant quotation
Key objectives of retail planning	1996	PPG6 paragraph 1.1	<p>“To sustain and enhance the vitality and viability of town centres.”</p> <p>“To focus development ... in locations where the proximity of businesses facilitates competition from which all consumers are able to benefit and maximises the opportunity to use means of transport other than the car.”</p> <p>“To maintain an efficient, competitive and innovative retail sector.”</p> <p>“To ensure the availability of a wide range of shops ... to which people have easy access by a means of transport.”</p>
Need for off-centre development	1996	PPG6 paragraph 3.3	<p>“Some types of retailing, such as large stores selling bulky goods, may not be able to find suitable sites either in or on the edge of town centres. In such cases, the local planning authority should still seek to ensure that such developments are located where they will be easily accessible by a choice of means of transport.”</p>
Need for flexibility	1996	PPG6 paragraph 1.12	<p>“The Government recognises that the [sequential] approach requires flexibility and realism from local planning authorities, developers and retailers. Developers and retailers will need to be more flexible about the format, design and scale of the development, and the amount of car parking, tailoring these to fit the local circumstances.”</p>
Sequential approach redefined	2003 (March)	McNulty, Statement to House of Commons	<p>“Where a class of goods is capable of being sold from a town centre location, that is the preferred location for the retail development and [the First Secretary of State] ... will expect to see flexibility in the scale and format of a proposed development to meet that objective. A retailing format [which] can only be provided at an out of town location is not regarded as meeting the requirements of this policy.”</p>
Flexibility on part of developers	2003 (March)	McNulty, Statement to House of Commons	<p>“[The First of Secretary of State] ... will look for evidence of, for example, more efficient design and layout, greater use of multi-storey developments, more efficient car parking provision, mixed-use development and opportunities for home delivery services.”</p>
Sites for large-format stores	2003 (December)	Draft PPS6 paragraph 2.35	<p>“[L]ocal planning authorities should seek to provide larger edge-of-centre sites where appropriate, capable of accommodating larger-format developments.”</p>

Table 1 (continued).

Policy	Date	Source	Relevant quotation
Flexibility on part of local authorities	2005	PPS6 paragraph 3.16	“Local planning authorities should take into account any genuine difficulties, which the applicant can demonstrate are likely to occur in operating the applicant’s business model from the sequentially preferable site, in terms of scale, format, car parking provision and the scope for disaggregation, such as where a retailer would be required to provide a significantly reduced range of products.”
Disaggregation of store offer	2005	PPS6 paragraph 3.18	“A single retailer or leisure operator should not be expected to split their proposed development into separate sites where flexibility in terms of scale, format, car parking provision and the scope for disaggregation has been demonstrated. It is not the intention of this policy to seek the arbitrary sub-division of proposals. Rather it is to ensure that consideration is given as to whether there are elements which could reasonably and successfully be located on a separate sequentially preferable site or sites.”
Control over mezzanine development through planning conditions	2005	PPS6 paragraph 3.31	“Local planning authorities should consider using planning conditions to ensure that the character of a development cannot subsequently be changed to create a form of development that the local planning authority would originally have refused. When appropriate, conditions should be used to: ... limit any internal alterations to increase the amount of gross floorspace by specifying the maximum floorspace permitted (including for example through the addition of mezzanine floors).”
Control over mezzanine development through legislation	2005 (March)	Planning Control of Mezzanine Development, Consultation Paper	“The Government introduced a new clause to the Planning Bill, which is now section 49 of the 2004 Act, to make the creation of additional floor space within a building, such as the installation of mezzanines, subject to planning control. The provision does not seek to prevent such development, but to allow authorities to determine such proposals, in the same way as they would for store expansion involving an external expansion of floor space, which would require planning permission.”

Note: PPG = Planning Policy Guidance; PPS = Planning Policy Statement.

Government interests became concerned however that superstore retailers were still arguing that only out-of-centre sites were appropriate for their needs. A study of the ways in which the sequential approach was being applied at planning inquiries attempted to clarify the question. It suggested two possible approaches (CB Hillier Parker, 2000):

1. The 'format-driven approach': the developer has a preferred format, which, in their view, does not fit into town centres and for which an off-centre location is therefore justified;
2. The 'class-of-goods approach': the view that as such goods can be sold from town centres, even if from several shops rather than one, an off-centre development is not justified.

The 'class of goods' approach found favour in 2000 (DETR, 2001), and a Ministerial Statement to the House of Commons in April 2003 reinforced the 'class of goods' policy (see table 1).

In December 2003 a consultation draft version of the new PPS6 was released (ODPM, 2003). In this document, although the advice to developers to be 'flexible' was reiterated, the advantages to shoppers and the wider economy of large-format stores were also recognised. The 'class of goods' interpretation of the sequential approach was to some extent abandoned (see table 1). These changes reflected pressure from other government departments, particularly the Treasury, which was concerned that UK retailing was not sufficiently productive compared with other Western economies (Guy, 2006).

The definitive version of PPS6 was finally published in March 2005 (ODPM, 2005a). The wording of advice on 'flexibility' is similar to that in the statement of April 2003. However, in line with the decision not to maintain the class-of-goods approach, it was acknowledged that in some cases a retailer's offer could not be realistically 'disaggregated' amongst smaller stores. The guidance indicated that developers must justify their choice of off-centre sites by producing "clear evidence" that any more-central sites are "not practical alternatives in terms of availability, ..., suitability, ... and viability ..." (ODPM, 2005a, paragraph 3.19).

The advice to local authorities in the draft version that large-format stores should be accommodated at the edge of town centres disappeared in the final version of PPS6, to be replaced by a weaker statement that local authorities should acknowledge any 'genuine difficulties' which the retailer may have in carrying out disaggregation. The advice as a whole on 'flexibility' and 'disaggregation' in PPS6 seems to try to accommodate both the position in the 2003 ministerial statement and a degree of concession to developers, with the result that it has been criticised as 'disgraceful' and 'appalling' in its lack of clarity (Holliss, 2005). We may expect further 'clarification' in due course.

An additional concern has been the 'loophole' in planning law, whereby additional sales space can be created within the shell of a building without any need for planning approval, for example by developing a 'mezzanine' in the roof space, unless this is forbidden through conditions imposed on the original planning consent. Following pressure from planning and political interests (for example, Friends of the Earth, 2003), secondary legislation was to be enacted in 2005, to require that mezzanine development should be made subject to planning permission (ODPM, 2005b; Warren, 2005).

However, given the slight relaxation in overall policy in the recent guidance, we can define a period of very tight control as being approximately 2000–04. In the following three sections we examine the response of retail developers to government policy during this period, and in the final section we consider ways in which developers may respond to current policy.

3 The case for large-store developers

The case for large stores lies partly in economies of scale to the retailer, and partly in advantages for the consumer, including increased product range, better choice of brands, and a more spacious shopping environment (Guy et al, 2005). These advantages lead to higher spending per trip and thus enhance the retailers' desire for large-store development.

Large stores do not have to be developed out of centre, but in practice sites which are large enough for a store and its car-parking requirements are often difficult to obtain within town or district centres. In addition, off-centre sites which are well connected to major highways are seen as more accessible for both goods deliveries and customer trips.

Not surprisingly, large-store developers, particularly some retailers, have opposed the increasingly strict policies on off-centre development (for example, Lowe and Reeves, 2000). This could be interpreted simply as a defensive measure from companies anxious to maintain their competitive advantage. However, the companies concerned have tried to develop arguments to show that prohibitions on large-store development can have wider economic consequences.

First, it is claimed that current policy is inconsistent with one of the four objectives of government policy generally—that of maintaining “an efficient, competitive and innovative retail sector” (DoE, 1996, paragraph 1.1). For example, the home-improvement retailer B&Q stated in evidence to a House of Commons Select Committee (2003): “Larger out-of-centre DIY stores can be built and operated at a significantly lower cost per square metre and have higher labour productivity. Within a competitive market, these lower costs will largely be passed on to consumers in the form of lower prices and improved services. Lower prices and improved productivity generate more rapid growth in consumer demand, increased employment locally and faster economic growth for suppliers and for the country as a whole. This in turn stimulates further demand for home improvement products and a consequent requirement for more retail floorspace in all areas, including those of high unemployment. Conversely, if the current planning restrictions on retail warehousing remain in place, and long planning delays continue, the market will expand more slowly and current UK DIY retailers will be faced with the option of buying up competitors' stores, thus further reducing competition and innovation, or investing overseas (as the expansion of operations into town centres is almost always not a viable proposition)” [House of Commons, 2003: Memorandum by B&Q (PCP08)].

Second, it is claimed that building large stores increases the range of goods available at one location and thus reduces consumer travel by cutting out multideestination trips. This argument applies both in the case of the ‘category killer’ large store which aims to sell everything within its product range, and the retail park which offers a wide range of shopping opportunities on one site. Research commissioned by B&Q shows that use of their largest-format stores (‘B&Q Warehouse’) compared with smaller formats can reduce overall car travel (CB Hillier Parker, 2002).

Third, it is claimed that consumers benefit from the larger selection of goods, lower prices, and other advantages of large stores (Guy et al, 2005). Another study commissioned by B&Q made a hypothetical comparison between a typical large-format ‘warehouse’ store and the equivalent sales area using fourteen separate sites in Reading town centre. The study concluded that:

“... the physical, economic and transport implications of attempting to sell the range and volume of goods sold from a single B&Q ‘Warehouse’ from a number of smaller town centre units is likely to be impractical and, would theoretically result in an increase in prices of circa 30%” (CBRE, 2003, abstract).

These arguments were neatly summarised by Marks and Spencer plc in evidence to the House of Commons Select Committee:

“Ultimately most goods can, in theory at least, be sold in town centres and from unit shops in town centres. A DIY store’s offer could be broken down into its component parts, a supermarket’s offer can be split between specialist shops etc. However, this takes no account of the development of styles and formats of retailing that have proved enormously popular with shoppers, are efficient for retailers and provide sustainability benefits by increasing the range and choice within a single unit, thereby limiting the need for multiple trips” [House of Commons, 2003: Memorandum by Marks and Spencer plc (PCP03)].

Thus, the retailers are developing a case which questions the assumptions behind government policy. This case has been made to MPs and government ministers and civil servants on many occasions (Pal et al, 2001). The arguments have on most of these occasions generated little response from government circles, other than reiteration of the need for ‘flexibility’ in development. However, the minor relaxation of policy in PPS6 reflected the influence of these arguments, mediated through Treasury officials during interdepartmental discussions during 2003 (see Guy, 2006).

4 Retail developers’ views on ‘flexibility’

4.1 Introduction

In this section we consider the extent to which retail developers have been prepared to adapt their proposals to meet government policy. As explained above, the need to demonstrate ‘flexibility’ first arose in the mid-1990s, but was intensified in 2000 by the government’s decision to adopt the ‘class of goods’ interpretation of the sequential approach. This meant that the standard product of large single-level stores surrounded by car parking was likely to meet an unfavourable response from local planning authorities.

The discussion below is based upon surveys of major off-centre retailers in the United Kingdom, carried out in 2001 and 2004. The 2001 survey was carried out for the interest group British Council for Out of Town Retail (since renamed Accessible Retail). This is a pressure group of chartered surveyors and property professionals who are involved in superstore development in the United Kingdom. The 2001 survey was designed principally to ascertain the nature and extent of economies of scale in this type of retailing (for further details see Guy et al, 2005). However, we were also asked to investigate whether retail planning policies were seriously restricting the development of superstore formats, both freestanding and in retail parks; and the extent to which retailers and developers had been able to compromise with planning policies. At that time, the government’s intensification of support for town centres had been announced only recently and retailers had not had time to adjust their development priorities. This survey was carried out through interviews and questionnaires, and we obtained responses from seventeen major retailers, all of which trade from large off-centre formats.

In the 2004 survey, carried out through telephone interview and e-mail, we revisited most of these retailers to establish to what extent they had attempted recently a more flexible pattern of store development, in response to government policy which by now was well understood. We also interviewed four property consultants with considerable experience of working with large-format retailers and property developers in attempts to secure planning consents.

The findings reported in this paper are almost entirely qualitative in nature. Our informants were willing to discuss the flexibility issue in general terms and to provide specific examples where their own stores had been affected by this issue. However, they were not able to give quantitative indications of added costs or reduced sales

consequent upon the need to be flexible. This reflects a general difficulty in obtaining any quantitative information beyond what is available from company annual reports and the like. Reasons for this lie in reluctance to divulge such information, but also (apparently) a genuine lack of internal analysis of detailed costs and revenues related to different store types and locations. Or, as one of our property consultant respondents suggested:

“Maybe this is because there aren’t actually any worked examples for them to refer to and they may not have bothered modelling a store which does not actually fit their requirement. Why should they?”

4.2 Findings from 2001 survey

The questionnaire was sent to individually named contacts, responsible for property development and/or planning negotiations, within retail operators which were known to have an edge-of-town or out-of-town component in their portfolios. Of the seventeen respondents to the questionnaire, two represented food retailers, two electrical goods, two do-it-yourself (DIY) goods, seven household goods and furniture, and four were from other types of retail.

With only one exception, all of the retailers in the survey reported that current town planning policy hindered their company’s ability to develop their ideal portfolio of stores. Four main problem areas became apparent to us from previous discussions with our survey sponsors, and we used these to structure the retailers’ comments. The first two relate directly to the flexibility issue and some willingness to compromise in these areas is shown by retailers and planners. The last two problem areas show more-general signs of frustration with what retailers saw as unhelpful or even hostile attitudes amongst town planners.

(a) *Downsizing of proposed new stores to allow development on physically restricted sites*

Four of the respondents regarded this as an issue for their companies, although there was some reluctance to compromise their offers to do this. One retailer mentioned an example in London where they had not been allowed to build the store of the size they wanted, had gone ahead with a smaller store, but almost immediately after it opened put in an application for an extension. One specialised operator reported that their problem was getting units that were small enough, especially on retail parks, whereas another drew some consolation from the fact that smaller sites were easier to assemble and did not attract so much resistance from planners—but nevertheless it was only at the stage of trialling a smaller format in response to this situation, and was not in a position to evaluate its success.

(b) *Development in less-than-ideal locations*

Five of the companies indicated that this had happened, but for most to only a limited degree as it was generally felt not possible to compromise to any major extent given the inherent importance of having the correct location: one mentioned that this “often results in poorly performing stores”.

However, there may be some relationship to the stage of growth a particular company has reached: most of the companies reporting were well established, but there was one which was in its early stages of growth, and where more compromises were having to be made. The particular example cited was a development in a poor area of a large city in need of regeneration:

“it’s a less than ideal location for us at the moment ... a dreadful part of [large city], highly in need of major regeneration, there is an existing retail park there which had two hundred thousand square feet, we took a hundred thousand square foot behind, immediate surrounds of the area are desperately poor Shrinkage is

high but consequently because of that and the reputation of the immediate area your destination customer is almost sceptical about travelling into that store and leaving their car outside, and we went there because there was an existing planning consent ... I do believe that ... it's going to be a long slow haul."

(c) *Delay and inconsistency*

The time delays resulting from the planning process were again mentioned by some respondents under this heading: even if they were not undertaking the main development themselves, issues such as putting in a mezzanine floor into a retail park unit were not always straightforward. Extensions to existing stores was also an issue for at least one retailer, but mentioned primarily in the wider context of the problems of restricted consents, which were sometimes seen to be unnecessarily detailed in their specifications, and lacking any underlying appreciation of either modern retail operations or shopping behaviours.

"Running a planning inquiry is over £200 000 these days. We've actually got the site, we've got the misfortune of holding on to the site, paying interest charges while you're running the planning inquiry, that could treble, quadruple the cost."

Procedural difficulties associated with plans for refurbishment, expansion, or changes in merchandise were another issue for nine of the retailers. The grocery, DIY, and electrical retailers were the ones most affected by these, and they related mainly to the issue of restricted consents, and definitions of categories of good used. A number of respondents expressed very considerable frustration with what they saw as the lack of consistency and arbitrary nature of many decisions on consents. As one put it:

"it always comes back to planning and dealing with local authorities because they just don't have an understanding of commercial reality and the need that if you're going to make a decision then you've got to get on with it and sort it now and not by next Christmas, when the customer has already moved on ... You miss the trend because you just can't move fast enough ... It's a major barrier to being able to satisfy the customer which is after all what we're all here to do."

(d) *The inability to open new stores in particular towns because of planning refusals*

Almost all of the retailers had experienced this consequence, and most provided examples of where it had occurred. As one noted, it is a "common problem", and that "many outstanding requirements are due to this", and three others noted that there is a detrimental impact on their company's growth targets. In at least one case of a rapidly growing company, it was felt that the policy was proving "a major drag on the ability of the company to invest", and that its ideal portfolio of at least another 100 stores to be built in areas where it is currently not well represented was being compromised. There was a considerable degree of frustration expressed by respondents at what they often perceived to be arbitrary and inconsistent decisions:

"There was a store in [town in South West England] which is an existing [Company X] store, which is cash and carry, it's right adjacent to a retail park and down the road from a major supermarket so it's a recognised retail location for the town ... [but] no way would they grant consent, absolutely no way, even though the building was there, hardly any building work needed, car parking there, established, as I said everything was established and they turned it down, that made no sense, rhyme or reason!"

In summary, we found that most of the retailers interviewed were finding increasing difficulties in developing large stores, mainly through the effects of government policy. These difficulties were at times exacerbated by what they saw as a rigid stance against out-of-centre development, imposed by local authorities. We found little evidence that at this time retail developers were attempting to be flexible in response to policy.

4.3 Findings from the 2004 survey

Our second survey was focused mainly on the issue of flexibility and comprised interviews (face-to-face and telephone) with senior staff employed by eleven leading retailers who trade from large-scale formats, and four property consultants with wide experience of the issues concerned. The retailers included food (3), DIY (2), and other out-of-centre nonfood operators (6). Five of these retailers also have a substantial presence in town and district centres. We based our discussions around the following questions:

1. What is your opinion on current government policy for retail development, and how this has changed since 2000?
2. Are you satisfied with the ways in which government policy is interpreted by local planning authorities?
3. The government seeks flexibility in store development (for example, smaller stores, multilevel, fewer car parking spaces, showrooms with delivery options, mixed uses). Is this practical for your company? Can you give examples of actual schemes you have built or intend to build?
4. Do/would such schemes impose extra costs on the company? In what ways?
5. Are such schemes acceptable to your customers? If not why not?

(a) *Opinions on current government policy*

All respondents were aware of the government's modifications of policy from about 2000 onwards, and the class-of-goods approach which required applicants to 'disaggregate' their proposed store offer. Several respondents interpreted this as a tightening up of policy, to the disadvantage of large-format retailers (see table 2 for typical interview statements). However, one respondent (a food retailer) considered that recent changes were "in the sense of clarification rather than any material differences". This concurs with the official ODPM view.

There was a difference of opinion as to whether the implementation of policy, mainly through planning-inquiry decisions, was now more consistent than in the past. One retailer commented that "I think over the last three years [policy] has become a bit more consistent in its application." However, other respondents complained about inconsistencies in implementation, mainly between local authorities but also to some extent between planning inspectors and the ODPM (see table 2).

The partial relaxation of requirements in the draft PPS6 was given a cautious welcome, as it was seen to be a recognition of the requirements of large-format retailers, although there was concern whether this would become official policy.

(b) *Interpretation by local authorities*

Respondents were, as in the 2001 survey, highly critical of the ways in which local authorities interpreted government policy. Some authorities used the guidance to argue for a complete ban on retail development outside existing centres. However, one respondent noted differences between 'southern' and 'northern' local authorities in their attitudes to large-store development: "I think in the north the lure of jobs ... has made [policy] less relevant, whereas in the south there seems to be a stronger will to protect town centres."

Respondents were critical of a lack of consistency between local authorities, and several felt that expertise amongst local authority planners was not sufficiently high to be able to deliver recommendations which recognised the retailer's case (see table 2).

However, our impression from these interviews was that relationships between retailers and local authorities were less confrontational than in 2001. There seemed to be more willingness to negotiate and compromise, partly because central government

policy was clearer, partly because negotiation was preferable to the costs and delays involved in appeal.

The problems noted in 2001, of costs arising from planning delays and the need to appeal against planning refusals, were still very much present for most of the companies interviewed. Indeed, most respondents considered the time taken to process applications had increased. This was a result partly of slow processing by local authorities and partly of increasing delays within the appeal system (see table 2).

It was also noted that the requirements of the sequential approach—particularly the consideration of ‘suitable’ and ‘available’ sites in town and district centres—was adding to the time spent in preparing planning applications.

(c) Implementation of flexibility

Respondents were aware of the need to be more flexible in designing new stores, and had made some adjustments to store formats in order to achieve this. These adjustments followed government advice and included smaller formats, town-centre stores, use of more than one level for sales, and development of mixed-use multilevel schemes. However, no company was happy with the notion of reducing car-parking standards. Use of the Internet and deliveries to the home was for some companies an important part of their operation, but not because of pressure from government. These observations are spelt out in more detail, including extracts from the interviews, in table 3.

There was a general feeling that these adjustments were the result of changes in planning policy and the consequent negotiation with planning authorities. Respondents however claimed that some of these changes would have taken place in any case, as they sought to widen their offer in the face of social changes and new arenas of competition.

(d) Imposition of costs

It was commonly claimed that greater costs were incurred by retailers as a result of the compromises made in the interests of flexibility. One well-known example quoted by several respondents was the B&Q store in Sutton town centre, which is on two levels. This was thought to have been very expensive to develop, compared with that company’s normal single-level ‘warehouse’ offer.

Town-centre developments were criticised as incurring greater capital costs, because of more-expensive sites, delays through site assembly, and higher development costs for more than one level or for a mixed-use scheme (see table 3).

Town-centre retailing could also incur higher running costs, through restrictions on deliveries in town centres, for example the times of day when deliveries are allowed, and the maximum size of delivery vehicles. A further problem arose when car parking for the store was shared with other town-centre users: this created requirements for car-parking provision possibly greater than the store itself needed, and also for systems for charging car-park users, refunding store users, and penalising those who exceeded their stay on the car park. These problems would not have arisen in out-of-centre stores.

One retailer also complained that their town-centre stores were trading less successfully than similar out-of-centre stores, probably because of consumer resistance to paying for car parking, and problems of traffic congestion in the town centre (see table 3).

Multilevel developments elicited a mixed reaction. On the one hand, retailers are seeking to develop mezzanine areas in existing stores, where there is sufficient roof height, and where their offer suits this layout. This may be done in order to sell a larger variety of goods without incurring higher rent, but also to separate staff accommodation from the sales area. On the other hand, purpose-built multilevel stores are

Table 2. Retailers' views on government policy and its interpretation (source: interviews carried out in autumn 2004).

Retailers' perception	Number of mentions (out of 11 possible)	Selected interview quotes
Tightening of policy since 2001	5	<p>"Basically it seems to have tightened up in terms of reinforcing the need to be more flexible in terms of format and reinforcing the protection that already existed in PPG6 towards town centres."</p> <p>"Yes, I think policy has tightened up because what it has meant is that the sort of units that are affordable for us ... have tended to dry up ... [and] we have found it a lot harder to find sites."</p>
Lack of consistency in implementation	6	<p>"About twelve to eighteen months ago there was inconsistency, not just across local authorities looking at our proposals but actually within the ODPM ... through the decisions that we were getting within a fairly short space of time from one another."</p> <p>"When you get to the smaller developments there's no consistency, some local authorities won't apply the [sequential] tests but others will."</p>
More realistic policies in Draft PPS6	5	<p>"This thing about a breakup of a store into different sections, disaggregation, that seems to have bitten the dust and I do sense ... there is some debate now within government as to whether the policy there has been perceived as being strictly correct."</p> <p>"I think with PPS6 it has improved actually and there seems to be more of a recognition now that edge-of-town and out-of-town sites may be appropriate in certain circumstances whereas I don't think that was recognised before. ... I think the planning policy is starting to take account of the need of retailers and the realisation that retailers do need to make a profit as well otherwise they just won't trade from a town."</p>
Lack of expertise in local authorities	4	<p>"With the smaller planning authorities, you've got individuals who are dealing with the whole gamut, retail, residential, industrial, whereas you really do ... need a retail specialist ... or the policy could be quite ineffective."</p>
Worsening planning delays and costs of going to appeal	7	<p>"I think you'll find less and less people are taking appeals because of the need to negotiate ... the general impression is it ain't worth taking to appeal."</p> <p>"The Planning Inspectorate now have thousands of appeals because of the reduction of times for submission from six to three months and are really struggling under the weight of it all ... and the time that the ODPM are taking to turn around decisions certainly hasn't lessened."</p>
Arduous requirements of sequential approach	4	<p>"We've just recently done a scheme in [small town], we're looking at something in the region of twenty-five different sites despite the fact that we were edge of centre, so it's that sort of thoroughness that now has to be bought in and obviously it must add cost to the equation."</p>

Note: PPG = Planning Policy Guidance; PPS = Planning Policy Statement.

Table 3. Retailer's views on flexibility (source: interviews carried out in autumn 2004).

Method of demonstrating flexibility	Number of companies using or considering this method ^a	Costs involved to the companies	Typical comments from interviewees
Build smaller stores	5	Higher development costs in proportion to sales Problems in operating stores outside the standard offer	<p>“We've had to look at opening more stores in a geographic area than initially we would have done, which is one thing that is every expensive.”</p> <p>“There are one or two convenience stores which have become so difficult to operate that we've had to close them.”</p>
Use town centre stores	7	Site assembly costs and delays Higher land costs Restrictions on goods delivery (times, size of vehicles) Access or car-parking problems for customers Reduced sales compared with off-centre stores	<p>“We're really trying to shoehorn developments into smaller and irregularly shaped sites and that clearly brings with it additional costs.”</p> <p>“The other things we're finding extremely difficult in in-town sites is the delivery restrictions and possible trading hours restrictions.”</p> <p>“In [a town] we have two stores of the same size, one on the edge of the town centre that you've got to queue for traffic lights to get to ... the store is exactly the same as the out of town store in terms of range, size whatever but ... the [out of town] store trades at fifty percent more.”</p>
Develop on two or more levels	6	Extra construction costs Loss of sales area Labour costs Consumer resistance	<p>“The construction costs of building a mezzanine to support the type of goods we sell is far more expensive ... and there's extra staffing costs.”</p> <p>“In terms of multi-level, construction costs are above and beyond what would normally be.”</p> <p>“[One of our stores] has two sets of travelators and they take up a huge amount of floorspace.”</p> <p>“The cost of stilts on average is between four and five million pounds, we do save on land costs but I don't think it's of the same value.”</p> <p>“Shoppers are lazy, they don't like going upstairs, we certainly take a significant less amount per square foot upstairs than we do downstairs.”</p>

Table 3 (continued).

Method of demonstrating flexibility	Number of companies using or considering this method ^a	Costs involved to the companies	Typical comments from interviewees
Mixed use, including residential	5	Difficulty in cooperating with residential developers	“Part of our offer is very bulky ... and most people wouldn’t really want to live next to the areas that have to sell those [with] deliveries and fork lift truck movements.” “The residential developers ... just don’t believe there’s a market for people wanting to live above retail premises ... that have loads of deliveries and are in busy footfall areas.”
Reduce car parking	4	Reduced sales Need to share car parking with nonstore users	“[In London] we’re really being squeezed on parking to a level that we’re not sure we can actually make it work.” “It’s not something we like at all because we find there is a direct relationship between the number of parking spaces and the ability of the store to make money.” “In town centres we have to control car parks which is another operating cost.”
Use Internet and/or home delivery	4		“There are various things that we do to enable people to get our goods home without using their car but to be honest most people aren’t going to do it, it’s such an infrequent trip ... probably once every couple of months.”

^a As emphasised during the interview.

criticised because of additional development costs, loss of sales area devoted to lifts and travelators, and additional labour costs.

In summary, the retailers we interviewed in our second survey had understood the recent changes in government policy and had to some extent adjusted their development strategies. There seemed to be some improvement in relations with local planning authorities although delays were still a major cost factor. Apart from food and DIY retailers, all the others were less willing to get involved in planning inquiries because of costs, delays, and the need for many site assessments in order to meet the sequential test. Some of the retailers were prepared to develop smaller and multilevel stores if necessary for entry to a particular geographical market. These could be more expensive to develop, and were seen as less efficient to operate, either because of reduced numbers of lines, or because of loss of sales space. Car-parking provision in town centres also presented some problems.

5 Development outcomes

In this section we build upon the conclusions from our surveys, through a discussion of recent trends in retail development. The source material is taken from practice literature and company statements.

The first question is whether retail developers have significantly adapted to new restrictions, or whether they have simply cut back on development. The report on the 'effectiveness' of PPG6 (CB Hillier Parker and Cardiff University, 2004) showed there had been a downturn in superstore and retail-park development, but not in free-standing retail warehouses such as B&Q stores. These trends would largely predate the imposition of the 'class of goods' rule in 2000. More recently, the takeover of Safeway stores by Morrisons was clearly related to the inability of Morrisons to expand their store portfolio into areas where planning consent for large stores was difficult to obtain.

Two of the major food retailers, Tesco and Sainsbury, have gone on record as broadly accepting the government's emphasis on town-centre development, and have for several years developed smaller edge-of-centre supermarkets, which often anchor other retail development. The few stores such as Tesco Metro developed in the heart of town centres serve a different market (mainly town-centre shoppers and workers) and would arguably have occurred anyway. Asda have been less willing to reduce the size of their food stores, but have in some cases built very large stores as the focus of edge-of-town centre developments, as for example in Llanelli (Thomas and Bromley, 2003).

Government advice indicates four ways in which retail developers are expected to show flexibility in store development. These are the scale of development; use of multistorey instead of single-storey buildings; incorporation of a mixture of land uses into the scheme; and reducing the scale of car parking provision (ODPM, 2005b, paragraph 3.16). Analysis of both our survey responses and the recent practice literature suggests the following.

(a) *Scale and location of development*

There has been increasing development of smaller food stores within or on the edge of town centres, but this has been driven by retailers' diversification strategies rather than being a response to the call for flexibility (Wrigley, 1998). Until very recently there has been little evidence of smaller nonfood stores being considered, other than Asda opening the 'George' clothing-only stores in town centres, of which nine are open or in the development pipeline at the time of writing.

The policy changes in the draft version of PPS6 indicated greater opportunities for large-format retailers to develop at the edges of town centres, but our interviews

suggest that this type of location may not be optimal, particularly if restrictions on car parking are implemented by local authorities.

(b) *Use of multistorey buildings*

The B&Q store at Sutton is often quoted as a desirable example, but there is evidence that development costs were high. Retailers in our survey claim that both capital and running costs of multilevel stores are somewhat higher than is the case for single level.

(c) *Mixed-use developments*

These are becoming more common, particularly among food retailers and in London, where planning policy now requires provision of residential space as part of supermarket schemes (GLA, 2004a). Our interviews suggest that retailers are sceptical about the commercial success of such developments, although Tesco are planning several such developments (*Property Week* 2005).

One retailer, Ikea, have radically altered their store format and location in order to compromise with planning policy. They have been reported as stating: "We really need to operate more stores in this country. It's not about winning or losing, but realising the planning regime as it is. There is little understanding or support for furniture retailers like Ikea in the UK" (Wood, 2005).

Having failed to win consent for several large out-of-centre stores, the company have announced proposals for multilevel, smaller footprint stores contained within mixed-use developments in or close to town centres (Chesters, 2005).

(d) *Reduced car parking*

We found no evidence that retailers are prepared to reduce their car-parking requirements, expect possibly with regard to town-centre schemes. The reduced requirements favoured by the Greater London Authority (GLA, 2004b, annex 4) create some concern, but it is recognised that London residents are more likely to use public transport than is the case elsewhere. However, local authority conditions that car parking in town centres should be made available to nonstore users limit the reduction that can be made.

(e) *Use of Internet and delivery services*

Clearly this would have happened irrespective of planning policy. The food retailers interviewed thought that there was much greater use of internet ordering in London, probably because of traffic congestion. However there is little evidence of retailers yet establishing small 'showroom' premises in town centres, as government policy suggests.

These findings together suggest some willingness amongst large-format retail developers to compromise with government objectives. Although retailers like to claim that their development programmes are consistent with government policy, our interviews, as well as evidence of behind-the-scenes lobbying of government departments (Guy, 2006), suggest that they find the 'town centres first' policy a considerable constraint on store development.

There is clear evidence from our interviews that in partially accepting government requirements on flexibility, retailers are carrying out suboptimal types of development, and/or incurring additional costs. It is clear also that means of continuing to develop orthodox large-format stores are still being found, particularly on previously developed 'brownfield' sites, making use of the government's agendas for 'regeneration' and 'social inclusion' (Guy, 2002; Wrigley et al, 2002).

6 Conclusions

In this paper we have examined the response of one set of private-sector interests to government policy for controlling new property developments, as expressed in planning policy guidelines and their successor statements. The largely qualitative research methods employed have proved successful in summarising industry attitudes and

responses to policy initiatives, but less effective in identifying financial costs and benefits. This reflects not only the unwillingness of the retail industry to divulge detailed financial material, but also the lack of rigorous appraisal of alternative development paths within the industry itself.

Four main conclusions emerge from our two sets of interviews and from the planning and property practitioner literature:

1. The major large-format retailers are well aware of the content of retail planning policy and ways in which it has been changing in recent years. Some of them are prepared to expend substantial time and energy in lobbying government interests, individually or through interest groups.
2. They feel frustrated by a lack of understanding when their proposals are considered by local planning authorities, and by the cost of delays for which both local and national governments are seen as responsible. This view is largely directed at the ways in which policies are implemented, rather than the policies themselves. One might add that the retailers generally make little effort to understand typical local authority attitudes.
3. Since about 2000 there has, however, been a partial acceptance of the government's requirement that developers of large-format stores show flexibility and tailor their product to the town centre or edge-of-centre environment. This process is still in progress, with recent announcements of scaled-down stores and mixed-use developments.
4. It is also clear that the search for flexibility is leading to increased costs in both store development and store operation. The recent relaxation of some elements of government policy is welcomed but does not amount to a return of what the retailers see as the much more liberal situation of the early 1990s.

The recent partial abandonment, in PPS6, of the 'class of goods' criterion in the sequential approach will be welcomed by large-store developers, as will the advice to local authorities to show greater understanding of the requirements of the retail industry. In practice though, local authorities and central government are likely to continue to insist that developers make every effort to use town-centre sites, tailoring their product to match, despite the extra costs involved. Disagreements between the two sides are likely to be exacerbated by the unclear advice on 'disaggregation' included in PPS6 (Holliss, 2005). A likely outcome in the longer term is that the development of watered-down versions of large-format stores in town centres will meet increasing opposition, on grounds of incompatibility with the traditional town-centre environment, generation of excessive amounts of car traffic, and concern in some quarters over the further growth of multiple retailing in town centres (for example, CPRE, 2004; New Economics Foundation, 2004).

Further research will be needed to investigate the responses of the retail industry to the new PPS6 and other policy changes; particularly from retail property developers, as opposed to retailers who develop their own premises, with which this paper has been mainly concerned. In the wider context, research into the attitudes of other sectors of the development industry towards government policy, particularly some of the more-detailed and more-complex aspects of policy, would help inform future revisions. We suggest that the qualitative methods used in this paper are appropriate for this purpose.

We finish with a broader conclusion. The recent history of retail development in the United Kingdom has been characterised by a lack of 'meeting of minds'. Despite the attempts of retail interests to participate in policy formulation (Pal et al, 2001), there is little evidence that planning policymakers in central and local government are concerned with questions of retail efficiency and competition (Findlay and Sparks, 2004; Guy, 2006; Guy and Bennison, 2002). The retail interests we interviewed feel that the UK government's 'town centres first' policy is creating a trend towards

inappropriate and inefficient development of 'scaled down' large stores in congested central locations, and reduced opportunities for innovation and competition in multiple retailing. Most town planners and politicians would consider that this (if it is really the case) may be a fit price to pay for protection of our town centres, but the debate continues to be based around anecdote and assertion (on both sides) rather than on solid evidence.

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