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CENTRE FOR THE STUDY OF RETAILING IN SCOTLAND

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An Introduction to CSRS Research

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ABSTRACT: The Centre for the Study of Retailing in Scotland (CSRS), established in 2002, aims to enhance the knowledge and understanding of Scotland's retail sector. Research activities to date include: the creation of the Scottish Retailing Bibliography – an electronic resource of existing material about retailing in Scotland; development of a GIS of Retail Provision – a spatially referenced database of retail outlets in Scotland; and development of a Shopping Panel – to provide a regular survey of fashion buying and shopping behaviour. This paper discusses the methodology of each research component, outlining research purposes, aims, progress to date and future plans.

KEYWORDS: Scotland; Retailing; Databases; Bibliography; Geographic Information Systems; Consumer Behaviour

An Introduction to CSRS Research

Retailing is an important and vibrant sector of the Scottish economy. Despite its contribution to everyday life, sparse and incomplete data and a lack of national focus inhibit the understanding of the sector in Scotland. There are features of the sector which are different from elsewhere and which reflect Scottish life and culture. The Centre for the Study of Retailing in Scotland (CSRS), a partnership amongst the Universities of Stirling, Edinburgh and Strathclyde, was established in 2002 (funded by the Scottish Higher Education Funding Council – SHEFC) to provide a resource to support and develop research on retailing in Scotland.

The primary purpose of CSRS is to **enhance the knowledge and understanding of Scotland's retail sector**. To achieve this, CSRS set four primary objectives:

- (1) To create and maintain a retail database for Scotland
- (2) To develop and extend existing research resources through electronic provision
- (3) To create a community of researchers in Scotland
- (4) To train future researchers in retailing.

Activities to date relating to objectives one and two are discussed in this CSRS Research Paper in Retailing. In particular, the three main components of the research to date are introduced:

- The Scottish Retailing Bibliography
- A GIS of Retail Provision in Scotland
- A Fashion Buying and Shopping Behaviour Panel

The Scottish Retailing Bibliography

Why do we need a Scottish Retailing Bibliography?

Retailing in Scotland has for some time been outperforming retailing in the rest of the UK. The sector since 1997 has produced a higher turnover than all other service industry sectors in Scotland (Scottish Executive, 2003). It accounts for 6.6% of total Scottish GDP (Scottish Executive, 2003) and employs one in ten of the nation's workforce (Scottish Retail Consortium, 2003). The importance of the sector to the economic affairs of Scotland is evident. In addition, the social and cultural aspects surrounding the activity of shopping make the retail sector without doubt a significant contributor to Scotland's economic, social and cultural life, for residents and visitors alike.

However, researchers interested in the sector face a fundamental problem. Data about retailing in Scotland are scarce and there is no collated source of available material on Scottish retailing. Retail academics and practitioners in Scotland have created and accumulated a variety of publications about retailing in Scotland. There are many libraries stocking retail publications and an increasing number of databases incorporating retail documents. Nonetheless, there is no database of Scotland-specific retail material. Considerable effort must be expended simply to find out what has been published about the sector, let alone understand and analyse what this material is 'saying'. Researchers depend upon access to a dispersed set of data and information sources, with all the time and costs this incurs.

The Centre for the Study of Retailing in Scotland (CSRS) was formed to enhance the knowledge and understanding of the retail sector in Scotland. The Centre by

definition is a disseminator of information. The importance of a 'knowledge bank' for *all* parties interested in retailing in Scotland has therefore been a priority for CSRS.

What is the scope of the Scottish Retailing Bibliography?

In establishing the scope of the Scottish Retailing Bibliography (SRB), a number of decisions had to be made. It was agreed that there should be no restriction on the time **period** covered and so all publications, irrespective of date, are included.

Historically, hard copy documents were the sole concern of researchers. However, researchers have for some time been faced with a plethora of electronic data, including PDF files, web pages and CD-ROMs. The SRB places no restrictions on **format** and incorporates material published in all formats.

The issue of **content** or coverage is the measure for a publication's inclusion or exclusion from the SRB. This point may appear obvious. However, frequently databases and other bibliographic listings cater predominantly for either academics or practitioners and/or the media as though they did not share common interests. Academic researchers may limit or indeed exclude non-academic works considering them at worst irrelevant or at best simply a summary reporting of something that has already happened. Similarly, practitioners or those working in the media may discard academic works considering academic output as esoteric or otherwise inaccessible. This situation exists despite an increased blurring between the roles of these groups in recent years.

In the construction of the SRB, we argue that it is the nature and purpose of the research that determines the relevance of material. The SRB therefore aims to include all material written about Scottish retailing and shopping activities. Works written by authors from all backgrounds are relevant as long as the content is rooted in Scottish retail.

Finally, there is the issue of **sources**. The vast array of sources and the dispersion of and accessibility to material was a driving force in the desire to create the SRB. Sources vary from narrow, subject or organisation-led literature databases and document type listings to wider multi-subject and multi-document sources. Academic, national and regional libraries, personal library collections, online academic and non-academic databases and local, regional and national government documentation listings are all relevant here.

Fundamentally, the SRB aims to be comprehensive, incorporating a wide range of publications ranging from books and journal articles to conference proceedings and newspaper items. Neither the author, the format nor the date determines a publication's relevance, but rather the content (retailing in Scotland) is the absolute determinant for inclusion in the SRB.

How has the data collection process been managed?

CSRS commenced the SRB data collection process in September 2002.

There were emerging management issues and general areas of concern during the search process. First, the search process ensured that keywords, subjects, titles and abstracts, where available, were searched for a host of potentially suitable terms and not simply for 'retail' and 'Scotland'. Where necessary,

documents were manually checked for relevant sections, chapters or subject matter.

Downloads from different online sources generated listings in different styles. Lists were therefore painstakingly reformatted to enable uniform presentation of material.

The use of various sources and search techniques naturally created duplication of entries. Publications, particularly mainstream documents and documents written by prolific authors on Scottish retailing, surfaced repeatedly. Care was taken to eradicate such duplications from the SRB.

Data collection has become easier with the influx of online resources. This in itself however creates a problem. Increasingly organisations adopt a short-term view, perhaps as a result of file space limitations or simply to keep sites fresh. This results in documents being posted online for short periods only. Because of this and the necessity for any database to be under constant review and subsequent updating, CSRS has a monitoring and review policy. Too many databases are created with great attention placed on their formation but then fail to deliver in the long-term because they are never updated and eventually become obsolete. The SRB is updated regularly to maintain its relevance and reliability. A full update was completed in January 2004. The database now totals 964 entries.

How is the information presented?

A potential danger with such a wide-ranging scope is that the bibliography becomes unwieldy for the researcher. Early considerations were therefore given to the presentation of the SRB. Having experienced the problems associated with

some other databases and considering the user-friendly intention of the SRB, it was vital that information was presented in as much detail as possible and in a style best suited to the material. It was also essential that the SRB was easily accessible.

There are a variety of document types in the SRB. Each publication is allocated a document type and within this, each entry lists the information relevant to its type. For example, conference proceedings display dates and venues and book chapters display chapter and page numbers.

In addition to the bibliographic fields of author, title, date and publisher and the document type specific data, where possible and relevant, each entry lists total page numbers, number of words (for trade and media articles) and an abstract outlining the primary content of the publication. The use of abstracts aims to facilitate faster identification of relevant publications.

An additional benefit of the SRB is the inclusion of a list of locations where each publication can be found. CSRS has access to many of the listed publications and where this is the case, it is recorded. However, whether held by CSRS or not, each record presents a list of holding libraries and where relevant a URL address.

A clear aim of CSRS was that the SRB be as accessible as possible to *all* persons interested in retailing in Scotland. A bespoke online search programme was completed in September 2003, at which time the SRB was made available online. The SRB is posted on CSRS's website www.csrs.ac.uk and can be accessed by any individual with a web browser and searched using a simple or advanced search facility.

The Simple Search facility enables the researcher to search the database for a word or phrase, either in all fields or in the abstract/description, author, title or journal title fields. The Advanced Search facility allows multiple word or phrase searches, again in all fields or in the abstract/description, author, title or journal title fields, and enables the researcher to narrow their search further by publication type, year of publication and as regards trade periodical and newspaper articles, by word limit (word boundaries can be imposed to include or exclude articles of particular lengths).

What does the future hold?

Any bibliography is a work in progress. A database is only really useful if it is reliably maintained. The SRB does not 'add' to Scotland's retail knowledge per se as it is a listing of existing publications. What it does offer is an unique and important resource. CSRS has created a comprehensive online bibliographic database of material about retailing in Scotland and presents this information to the researcher, whether independent, organisation-based, academic or otherwise, as a one-stop shop for existing literature about this important sector.

Updating is continuing. We also expect that some material has been missed from the SRB. If you are aware of 'gaps' then please email CSRS at info@csrs.ac.uk.

Having established the SRB, CSRS is carrying out a detailed analysis of the publications listed in it. What does it tell us about the sector in Scotland? What does it tell us about the state of research? And conversely, what does it not tell us? It is acknowledged that gaps exist in our knowledge of the sector in Scotland, hence the wider aim of CSRS to unite those with a common interest and promote research activities. Analysis of the SRB will identify research gaps and potentially help direct future research activities.

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A GIS of Retail Provision in Scotland

A Retail Database for Scotland

In October 1998 a revised form of central government guidance on Town Centres and Retailing (NPPG8) was issued by the Scottish Office Development Department. In the autumn of 2002 the Scottish Executive hosted a retail seminar to assess the need for updated research on the effectiveness of the policy and in December 2002 it issued a brief for consultants to study the effectiveness of NPPG8.

The consultancy report for the Executive has now concluded (Scottish Executive, 2004) that there **is** a need for a national retail data source to be established to provide information to aid in a number of decision-making areas such as retail impact assessment, town centre monitoring and retail planning applications.

One of the aims for CSRS was to study the feasibility of creating and maintaining a retail database for Scotland for use by academic and professional groups. A key element of this retail database was the creation of a spatially referenced database of retail provision across Scotland.

This section of the paper describes the current state of development and usage of a geographic information system (GIS) of retail provision. To study the feasibility of the GIS required an examination of the practicality, costs and demonstration of value of various procedures. Several processes have been covered including:

- data collection by different techniques of field survey, use of secondary sources from trade groups and direct collection from firms;

- data analysis by various statistical procedures within, and outside of, a geographic information system (GIS);
- data representation and classification of retail type;
- and evaluation of GIS software for data collection, representation, management and analysis.

A GIS of Retail Provision in Scotland

As is widely cited (e.g. Jones and Simmons, 1987), the location of retail activity through retail units is of fundamental importance to the success of a retail enterprise. The majority of research into retail location has been at a regional and urban scale. Given the importance a few metres difference in location can make, or the presence/absence of competitors or complementary activities the intra-centre level of investigation, i.e. within shopping districts, is relatively under-researched (Brown, 1992).

Location continues to remain, and may possibly even increase, in importance to retailing as reflected by the recent considerable strengthening of primary zone rental rates, decline in tertiary rates but an increase in the variety of potential locations (Dawson, 2000). The increase in e-retailing in some sectors and changes to transport infrastructure are just two of many other environmental factors that will also affect the importance of location to retailing.

The data held within the retail provision GIS is available for a number of uses. The aim is to analyse the spatial dynamics of the Scottish retail sector and specifically to examine **intra-centre retail composition** of both **planned centres** and **unplanned districts**.

Historic data will be important for developing an understanding of which centre compositions are or are not dynamically stable. Any snapshot will contain retailers operating units in certain positions that are unrepresentative and unstable.

Delimiting retail centres and understanding appropriate typologies within retail centres will also be important. For instance certain types of retailer such as mobile phone and accessories retailers now appear to be important constituents of retail centres in their own right whereas few retail classifications have yet developed to distinguish them.

The development of the GIS and subsequent research will hopefully inform specific Scottish policy legislators and centre management operators as well as providing advice for retailers themselves as to the potential of new sites.

It has been estimated (Dawson, 2000) that there are approximately 25,000 retail units [SIC52] across Scotland. Using a wider definition, around 10,000 have been surveyed for the retail provision GIS (RPGIS). The approach has been to collect three different views on retailing across Scotland. There are overlaps between the views but these are useful for validation and checking. The views are:

1. Urban focused retailing
2. Format focused retailing
3. Multiple focused retailing

Urban Focused Retailing

In total 8637 units across 4 different areas have been surveyed over the spring and summer of 2003 representing a number of different urban retailing environments:

- a large, east coast conurbation – Edinburgh – 6698 units;
- a medium sized, west coast urban area – Paisley/Renfrew – 1015 units;
- a medium conurbation – Inverness – 729 units;
- and a small conurbation – Cupar – 195 units.

The following data have been collected by unit:

1. Geographic position to the nearest metre,
2. Unit Occupancy,
3. Shop Name,
4. Address,
5. Postcode,
6. Type of Retail 1, 2 and 3 – these variables have been captured as long strings of text categories selected by surveyors from a list. They need extensive recoding and consistency checking to carry out useful analysis.
7. Floor Level – pseudo-numeric – contains a lot of string entries and multiple entries within the same field.
8. Floorspace – numeric sq m estimated.
9. Frontage – numeric m. estimated.

The data have been collected through street front surveys utilising both paper based methods and handheld GIS units based on Compaq iPAQs. These units allow local maps to be displayed that can then be directly annotated by

surveyors. It was decided not to use a GPS-based system as they can be difficult to use in urbanised areas, especially those with multi-storey levels, as the radio signals get diffused by buildings and produce inaccurate location readings. All surveyors are trained in a strict methodology to maximise data quality and consistency.

Format and Multiple Focused Retailing

Data have been collected on three main retail formats: Food Superstores; Retail Parks, and Shopping Centres.

Data on food superstores have been collected from the Institute of Grocery Distribution (IGD) who maintain a UK wide, food store database. 492 records have been identified for Scotland with the following content variables:

- Fascia = Nominal
- Company = Nominal
- Multiple/Independent/Co-op = Nominal
- Open Date
- Town
- County
- Region
- Country
- Postcode
- Gross Area = sq ft
- Sales Area = sq ft
- Car Park = Integer (num spaces)
- Checkouts = Integer
- Petrol = Y/N

Data have also been collected on 75 retail parks and 88 shopping centres across Scotland containing over 3000 retail units with information on location, size, facilities and other key figures.

Data have been collected on the shop networks of the 27 largest retail firms by floorspace in Scotland amounting to 1471 records.

Additional Data Sources

There are other potentially important sources of data for a national retail provision database. Surveying street front retailing and retailing from planned centres will capture a large proportion of retail activity. However there are other formats of increasing significance.

Permanent sophisticated retail units are developing associated with a variety of cultural, leisure and tourism (CLT) sites such as museums, theatres and historic buildings. Other non-traditional sectors such as hospital retailing may also be worth surveying.

Non-permanent events too offer retailing opportunities – both of the CLT variety such as craft fairs and festival retailing and of the more traditional variety such as farmers' markets and car boot sales.

The RPGIS has also been enhanced using the annual Scottish Retail Development Survey. The survey is a co-operative effort between local authorities and the Scottish Executive Development Department. It involves the monitoring of all retail developments over 1,000 sq. m (gross) which are recorded as 'active' by local authorities during the calendar year. The survey for 2000 has been used to demonstrate the rate of new retail floorspace approval at local authority level by

both base population and also indexed by the existing sales base in that local authority. The unavailability of figures on sales below that level and postcodes of new developments restrict any more detailed analysis being carried out.

Data have also been obtained from City of Edinburgh Council. They were collected in 1996 and there are therefore large discrepancies with CSRS data. It covers a smaller geographic centre than CSRS and is less geographically precise because retail units are located by postcode delivery point rather than by individual location co-ordinates.

Data are also available from local authority valuation boards – see for example: <http://www.grampian-vjb.gov.uk/val-roll/vr-search.htm>. There are confidentiality issues here but for a national retail database these may be surmountable.

Retail directory data is available to provide a valuable historic resource for 26 town centres across Scotland.

The RPGIS will be enhanced in 2004 through resurvey of certain data sources. Other data variables not collected in the 2003 survey may also be added. Ethnic retailing may be of interest to members of CSRS. Retailers' use of mezzanine flooring is also becoming a topical subject for planning authorities.

The issue of collecting more data for the retail provision GIS can be seen as a cost/resource trade-off to determine the boundaries of a multi-dimensional hypercube. The dimensions include:

- geographical coverage - what percentage of Scotland?
- geographical accuracy – to the nearest metre?
- longitudinal frequency – at what time interval?

- format coverage?
- feature richness – linking store location to characteristics of the firm?

What data will be collected will be determined by its cost, quality, ease-of-access/use and value.

Next Steps

There is a need to show value from the existing data that has been collected. Rigorous analysis is also important to inform future data collection processes. Analysis has commenced on the micro-scale location of planned and unplanned retailing areas in Edinburgh, using techniques such as nearest-neighbour analysis.

It has been decided to resurvey some of the existing urban areas in 2004 begin to provide longitudinal analysis potential and help establish a more stable view of the urban retail picture. Longitudinal data will also allow impact analysis and rate of change analysis.

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A Fashion Buying and Shopping Behaviour Panel

Introduction

This component of CSRS work involves the establishment of a consumer panel, initially in the Glasgow area, to provide longitudinal data regarding customer buying patterns and attitudes towards the fashion retail sector. The aim is to develop a database that can act as a research resource and which can be analysed to understand the shopping processes of Scottish consumers, consumer attitudes towards fashion brands and retailers and to identify the nature of changes in consumer buying behaviour in the fashion sector.

Approximately 100 members will be recruited to the panel. Members are being selected from a broad spectrum of the community in order to reflect different consumer groups. These groups include women with families, the disabled, retired men, students, young professionals, internet and ethical consumers. We are encouraging a mix of both male and female respondents as well as a range of age groups to join. Data will be collected from the Panel on a regular basis.

Methodology

An initial pilot period was used to test the efficiency and effectiveness of various consumer diary methods. These methods included:

- **written diaries** involving pre-produced question sheets in order to ensure consistency in the data collected;

- **audio diaries** using tape recorders or weekly recorded telephone interviews;
- **electronic diaries**; and
- **audio visual diaries** using web cam technology.

The written, audio and electronic diaries proved successful with respondents reporting the ease with which these diaries were completed. Unfortunately, the web cam method encountered numerous problems, including short recording periods, participants' need for access to a computer with a large hard drive, a large amount of free memory space and a fast processor, and access to the internet. The main obstacle to the success of this technology however, was participants' reluctance to use it. As a result diaries are now written, spoken or electronic.

The diary, regardless of the data collection method used, was designed and implemented in the same way. First, participants complete a brief questionnaire to provide some background personal information and their attitudes towards shopping. They then begin the diary keeping period, which lasts for four weeks. It was decided this was a suitable period to gain useful information as it is long enough for participants to have made a shopping trip, but also short enough to maintain participants' interest. Participants are asked to complete a full diary entry, which includes sections detailing both positive and negative aspects of their trip, as soon as possible after each shopping trip. We class a shopping trip as any excursion where the participant was in a retail outlet, either traditional or online and whether they purchased an item or not. As the interest is in the locations visited and the experiences of consumers in addition to purchasing patterns, this is seen as the most accurate way to gain the maximum amount of information.

Each participant is asked to record the same type of information, regardless of collection method. A question sheet was designed and reproduced to suit each recording method.

- **Written Diary** – a pro forma and enough copies for ten shopping trips is supplied in a ring binder.
- **Audio Diaries** - those using tape recorders are provided with a summary of the pro forma, and those being telephoned to collect data also followed this summary.
- **Electronic Diary** – the original electronic copy of the question sheet is emailed to the participants to complete on their computer and return by email.

This consistency between methods ensures that the data collected can be compared and analysed.

Progress to Date

A **women with families** group have completed two diary periods to date. In the first session all participants used written diaries, and for the second session audio diaries were employed. Half used a tape recorder/dictaphone and the other half employed the weekly recorded telephone interviews. For those using the telephone interview method, a day and time was agreed for the researcher to telephone. Each interview lasted between two and five minutes depending upon the amount of shopping the participant had done in the week leading up to the interview. The telephone interview was recorded using technology which plugs straight into the telephone. All the interviews were transcribed.

A **disabled** group have also completed an initial session. There was a wider mixture of recording methods used in this group. Most participants chose the written method, while others preferred to completed the dairy electronically and returned it by email. The audio tape recorder/Dictaphone method was also selected by a few participants.

Diaries have been completed for two separate **student** groups. These were recruited from Masters students at Glasgow Caledonian University and undergraduate students from the University of Stirling. These all took the form of written diaries.

Future Goals

A number of objectives still need to be completed in order to meet the main aim of this project. First, the existing written diary entries are being entered onto the computer in order to analyse them using various software packages such as NVivo and SPSS. This will ensure consistency in analysis and enable comparison between the transcribed audio diaries and the written diaries.

Secondly, we are in the process of recruiting further panel members in order to reach our full allocation of 100 participants. Current recruitment focuses on the final allocation of retired men and young professionals, in addition to recruiting a full allocation of the two newest groups, internet users and ethical consumers. Through CSRS's involvement in another project we have gained the contact details of many ethical consumers who may be interested in taking part. Those who live in Scotland are being contacted and invited to participate. This should hopefully lead to a full allocation in this group.

One of the main aims of this research is to gain longitudinal data regarding consumer shopping patterns and attitudes towards fashion shopping. In order to achieve this aim, further diary periods are being completed by all groups.

Lastly, the rich data collected thus far by means of the diary method have raised some further research questions. In order to gain a better understanding of the issues that have arisen, and to achieve further insights into individual's experiences of shopping, existing members have been invited to take part in an in-depth interview. The information gained through these interviews will also aid in the alteration and improvement in the design of future diaries.



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