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FASHION BUSINESS AND PROMOTION

FINAL MAJOR PROJECT - ADM60051

The future of the High Street:
Is the High Street viable in its current form and does it really serve the needs of the consumer?

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Figure 1

ABSTRACT

This study is to assess through primary and secondary research whether today's High Street retail space is viable in its current form and does it really serve the needs and wants of the consumer.

Chapter one discusses the evolution of the high street and the impact it has had on bricks and mortar retailing. Chapter two looks to establish the consumers wants and needs from a shopping experience, primarily through primary research which is also summarised in the attached excel spreadsheets.

The aim of chapter three is to understand the Online retailing market with Chapter four reviewing the impact of visual merchandising on consumer shopping habits. Here the psychological aspects behind visual merchandising is also reviewed.

Chapter five, gives consideration on how the high street can ensure long term and ongoing success.

The conclusion of this project is that the high street is facing major challenges, but the consumer still enjoys the physical shopping experience. By looking to combine, build on and learn from the online offering, the retail space can once again flourish. Not in its exact current form but with enhancements and innovation it can look to meet the wants and needs of the 21st century consumer.

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- Participants of my questionnaire

- Participants in my observation

- Participants in my focus group

And all the authors of the articles used throughout this study.

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Bricks-and-Click-Store:
A retail business that offers its products to consumers through a store facility and the internet.

Bricks-and-mortar-store:
A retail business that has a physical appearance, as opposed to an internet-based company (eg: department stores, mass merchants, specially stores, boutiques, discount stores and outlet stores located in buildings).

Retailer:
A business that sells products to the ultimate consumer and can include the vast range of brick-and-mortar-stores (eg, department stores, mass merchants, specially stores, boutiques, discount stores and outlet stores) as well as catalogue and online stores.

(Granger, M. 2007).

FIGURE 2

FIGURE 3

FIGURE 4

INTRODUCTION

The aim of this study is to assess as to whether the high street retail sector is failing in its current form and how it may need to evolve its physical space in order to meet the consumers ongoing and future needs.

The face of the high street is changing, with many established brands closing stores, such as Coast, Debenhams, Karen Millan, Mothercare.
There is a rapid decline in footfall with consumers choosing to purchase online rather than visit the high street. Working for a luxury brand in a high street setting, has led to an interest into why the consumer appears to be turning their back on the high street and moving to other ways of shopping (such as online). A reduction in footfall and the increase in online shopping, questions the motivation and rationale of the consumer in not using the high street and what would reverse an apparent trend of decline.

Chapter one will investigate the evolution and history of the high street and will examine through primary and secondary research factors that contribute to the perception that the high street is failing.

In chapter two, by exploring a consumer's wants and needs it will determine if the high street can evolve and adapt to meet the changing needs of the consumer and will provide an insight into its future state. Consideration as to why some stores are thriving on the high street when others are not, and how some are assessing and reacting to their consumers wants and needs through innovation and creativity.

Chapter three will explore the online sector and investigate how the online and high street retailer can work collaboratively.

Through secondary research, chapter four will look to gain an understanding of the impact of visual merchandising on a consumer and how stores are evolving their bricks and mortar stores to ensure they are providing a true retail experience.
The research will help to give an insight into why online shopping has become a threat to the high street and how stores can combine the online shopping experience with their established high street offering in order to meet all consumer's needs.

An investigation into how technology and sustainability can shape the future of the retail sector on our high street will be concluded within chapter five. This in conjunction with how government and councils can assist the retailer will determine the long-term future of the retail sector on the UK High Street.

In order to gain insight as to the perception of a failing high street and how it may need to change to meet the ongoing and changing needs of a consumer, a number of research methods have been used.

A number of research methods were used within both primary and secondary research methods.

For the primary research it was important to gain a wide range of views and opinions from different age groups and genders to ensure that the information was representative of the consumer population and not distort the overall results.

METHODOLOGY

PRIMARY RESEARCH

Online questionnaire

An online questionnaire was shared across social media channels, LinkedIn, a Student Dissertation forum, office email circulation and high street face to face questioning. This was to ensure that the views of a broad demographic of individuals were obtained, including age and gender.

Observation within a High street Retail Setting.

A day was spent observing the footfall across a department store on a high street along with questioning of the store's consumer to gain their thoughts on the changing high street and what changes, if any, could be made to enhance the retail experience on the high street.

Interviewing managers of concessions within the department store.

Interviewing managers to gain their feedback on the footfall across their concession and how they were performing for year on year sales; along with how they viewed the current state of the high street and what, as experts in the retail sector, they felt was needed to ensure profitability and growth.

Interview with retail expert and retailer author – Huw Hughes- across LinkedIn.

Approaching an established retail author to gain his insight on the changing face of the high street and his thoughts on its future.

Focus Group

Discussion with six females with an age range from 17- 58 to gain their thoughts on high street vs online shopping.

SECONDARY RESEARCH:

Websites, Online Journal, Reports
Sources such as Government reports, Retail Gazette, LSN, Mintel, BBC News, Forbes, Market Line and Financial Times

These were used to gain professional information on the area being discussed, with appropriate referencing throughout.

Books:

Bricks and Mortar in the 21st Century by Tina M Lowrey.

An oversight of the bricks and mortar offering within the 21st century high street.

Fashion, the Industry and its Careers by Michele Grainger

This was used to assist with definitions.

Fashionopolis – The Price of Fast Fashion and the future of Clothes by Dana Thomas

This was used to understand more about fast fashion, sustainability and innovation within the fashion industry.

CHAPTER ONE

TO INVESTIGATE THE EVOLUTION OF THE HIGH STREET AND THE IMPACT IT HAS HAD ON BRICKS AND MORTAR RETAILING

CHAPTER 1.1

"The retail sector is the part of a country's economy that is made up of businesses that sell goods through stores and through the internet to the public"

– The Retail Sector. (Dictionary.cambridge.org, 2019)

FIGURE 5

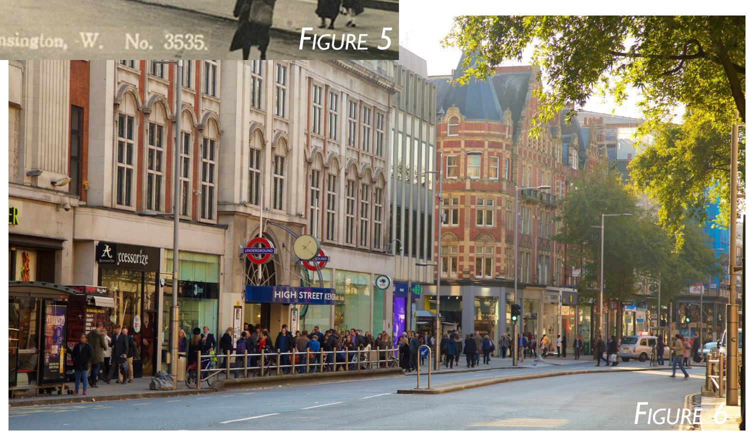


FIGURE 6

THE HISTORY OF THE HIGH STREET

The UK high street forms part of this retail sector. It first came into existence in the 1870's, due to urbanisation. This resulted in people no longer being able to grow their own food, so they had to go out and buy it, first from market stalls which then turned into shops. During the early twentieth century shopping became really popular, with shopping turning from a necessity to a leisure activity. The rise of the 'Votes for Women's Movement' saw women wanting places to go on their own in their leisure time and 'retail therapy' was born. (Company, 2019).

During this time people 'fell in love with the high street' The high street was once the heart and soul of a town- 'the butcher, baker and candlestick maker'. Britain was a rich country with people wanting to spend money on the high street in shops that were filled with luxuries. (Turn Back Time: The High Street Edwardian, Episode 2, BBC1, 2011)

Now, the UK high street has an uncertain future; the impact on the economy through factors such as BREXIT, the change in consumer behaviours, the advancement of technology and the rise of online shopping, has raised the question of how our high street will adapt, tackle these issues in order to evolve. (Retail Think Tank KPMG| Ipsos Retail Performance, 2018).

CHAPTER 1.2

ECONOMY FACTORS

Changes and challenges to the UK economy has had a knock-on effect to the high street. A joint report by 'KPMG and IPOS Retail Performance Think Tank' detailed some factors that may have had a negative impact and include:

- Brexit uncertainty
- Changing in consumer shopping habits
- Too many physical stores
- Many retailers having high levels of legacy debt affecting their profit margins
- High retail rents and rates

(Retail Think Tank KPMG| Ipsos Retail Performance, 2018).

A government report also details the impacts of business rates on high street retailers.
For example; The online retailer Amazon pays just 0.7% of its actual turnover in business rates compared to 7% for the high street retailer New Look and 3% for the department store Debenhams.

The government report detailed that there was an unfair playing field for the high street retailers against the online retailer. Some of the recommendations within this report included;

- A review of the impact of business rates on businesses
- A consideration into a rate allowance (similar to income tax allowance) for high street retailers
- A reduction in business rates for retailers in high streets and town centres
- An increase in the 'future high street' funds
- A 12-month holiday for high street retailers from any increase in rates
- Taxing of online sales that could supplement high street business rates
- Introducing how business rates are calculated for the warehouses of online retailers which is based their turnover.
- Replacing business rates with a sales tax or an increase in VAT
- Introducing an online sales tax that would supplement the existing business rates system
- 'Green taxes' on deliveries and packaging.
- A full review into business rates and business taxation.

Rental payments are also an issue for business with the likes of New Look paying 10% of its turnover in rental payments impacting its operating expenditure and increasing its profit margins thus impacting their overall profitability.

The report also detailed that long leases and 'upward-only rent reviews' caused rents to rise to a level that no longer reflected the market and in the case of Debenhams, resulted in them paying above the market price for rent for two thirds of its stores. (Parliamentary Business, 2019).

FIGURE 7

FIGURE 8

CHAPTER 1.3

POSITIVE ASPECTS OF THE HIGH STREET

Many positive attributes come from the high street. Primary research into the consumer outlined that they enjoyed being able to browse items in stores and liked that they were able to purchase items straight away without having to wait for delivery. Feedback also indicated that stores that created more of a community feel are the most successful- the new Primark in Birmingham was deemed a standout store due to the vast amount of services they offer. (See Appendix 1)

Another example of a positive movement on the high street is the collaboration between bricks and mortar stores with online retailers. The fast fashion brand 'In The Style' have teamed up with the supermarket chain ASDA to create 'duel-branded lorries to strengthen their distribution deals'. This deal has allowed customers to receive their parcels next day at their local ASDA store for just 99p. This initiative encourages people to come into store to collect their items thus paving the opportunity to shop. (Whelan, G, 2019).

By collaborating with successful online retailers, it will give bricks and mortar stores the opportunity to benefit from the popularity of the online retailer bringing consumers into the high street stores.

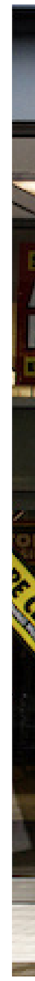
A number of high street brands do offer the click and collect service and it is usually cheaper than the cost of home delivery- this shows that businesses are already noticing future trends that consumers will be demanding. (Retail Think Tank KPMG| Ipsos Retail Performance, 2018)

The report by KPMG and IPSOS retail highlighted the opportunity of the click and collect service, providing the retailer with significant cost benefits against home delivery and the opportunity of the integration of the shopping experience when collecting from in store. (Retail Think Tank KPMG| Ipsos Retail Performance, 2018)

Amazon have also begun to introduce pop up stores in struggling towns and cities. ***"This concept will provide online businesses with a tangible platform to trade in a high-impact retail area."*** They hope to help smaller, struggling businesses by bringing people to the high street and showcasing the benefits of the online-instore shopping experience. (Garcia, F, 2019).

We have seen a large amount of store closures in the last five years, but from research it seems that a lot of stores are closing in expensive cities such as London and opening in smaller and cheaper towns. This may have something to do with the rent that businesses have to pay. This is an indication that the whole high street may not be failing but stores are being more savvy as to where they choose to do business. (PwC, UK 2019).

CHAPTER 1.4



NEGATIVE ASPECTS OF THE HIGH STREET

FIGURE 9

One of the most tangible negative aspects of the UK high street is the amount of store closures and empty retail units.
With the rapid number of stores closing, it is becoming more evident that something needs to change. In the first half of 2019, there were 2,868 store closures, (this is the most during the past five years) however with stores opening, the overall NET figure was 1,234. (PwC, UK 2019)
Studies have shown that from March 2016 to 2019, UK retail lost 106,000 jobs and it is predicted that in the next decade retail will have 900,000 fewer jobs. (Simpson, E. 2019)

Research found that:
- The majority of stores didn't offer anything out of the ordinary to encourage consumers to come into the store. (See Appendix 2)
- The shopping experience needs to alter to match the wants of their consumer and a 'tangible experience' this were found in reports conducted by both the researcher and external parties. (Retail Think Tank KPMG| Ipsos Retail Performance, 2018
- The cost and lack of parking turns people off visiting their high street (See Appendix 1)

CHAPTER 1.5

HOUSE OF
FRASER
SINCE 1849

THE DOWNFALL OF DEPARTMENT STORES: HOUSE OF FRASER CASE STUDY

FIGURE 10

Opening in 1849, the House of Fraser that once thrived has seen very unsettling times. In May 2018, staff were preparing to lose their jobs as the store fell into administration, However, it was purchased by Sports Direct International CEO Mike Ashley, with the vision to make the store the 'Harrods of the high street'. (Houseoffraser.co.uk. 2019)

Since buying House of Fraser, Mike Ashley admitted that he has lost more than £1million per week. (Simpson, 2019) From observations of the researcher working in a concession within a House of Fraser store, footfall has decreased significantly since the buyout resulting in the weekly year on year sales reducing. (See Appendix 1)

From consumer engagement, feedback was that the shopping experience 'felt sad' and the atmosphere in store was compared to a 'ghost town'. Contributing factors were given as the lack of music and the type of products being offered in store- 'there was nothing new'. The store was 'outdated'. (See Appendix 3)

Mike Ashley's new concept store 'Frasers' will open in January 2020 in Wolverhampton which will include product from Sports Direct, Flannels and House of Fraser- this store will be the first of its kind and really define as to whether department stores can continue to thrive in the current market. (Guttridge, R, 2019)

CHAPTER TWO

TO ESTABLISH THE CONSUMERS WANTS AND NEEDS FROM A SHOPPING EXPERIENCE

CHAPTER 2.1

FIGURE 11

FIGURE 12

UNDERSTANDING THE CONSUMER


FIGURE 13

What consumers want from a shopping experience has changed. Studies by 'Disney|ABC Television, Omnicom Media Group and Insight Strategy Group' have shown that consumers want brands to be 'cool, reliable and authentic' and have 'an understanding of age and where people are at in their life stage'. (McAteer, O, 2018)

Brands now more than ever need to understand their consumers. For example, if brands want to target millennials, they need to ensure their marketing is unique and interesting. This generation are extremely tech savvy and spend money in indulging in experiences.

A brand that has an excellent understanding of their consumer is Ted Baker. They have been identified as the second largest specialist retailer with an annual growth of 11%. They have achieved this growth as they have a 'strong lifestyle proportion' and an 'exceptional understanding of their consumer'. By having this understanding, they have been able to build brand loyalty which is representative in their sales. (Dover, S, 2018)

CHAPTER 2.2

FIGURE 14

CONSUMER DEMAND FOR SUSTAINABILITY AND TRANSPARENCY

Sustainability is something that is now demanded by the consumer. According to a study conducted by Mintel, 22% of consumers said that they would pay more for clothing that is sustainable with a further 30% of people saying they consider landfill waste when purchasing clothing. However, 79% said they find it difficult to find sustainable clothing. (Baram, C, 2019)

Leaders in this sector are Zara and H&M. Zara and its parent Company Inditex, are known for being leaders in their ability to respond and stock fashion trends along with their skills in adapting to multi-channel shopping behaviours. (PwC, UK 2019) However, they are also a retailer that has announced new sustainable retail practices. It has promised that by 2020 "all of its stores will be eco-efficient and free of all plastic bags" and by 2023, "all single-use plastics will have been completely eliminated for customers' sales, and none of Inditex waste will go to landfills". (Baram, C, 2019)

H&M, the 4th leading specialist retailer are also one of the leaders in creating sustainable collections. They have launched a 'product transparency initiative' on their websites, allowing consumers to know everything about the products they are buying. Primark are following their lead and have been more sustainability conscious and transparent by releasing reports on the location of their manufactures factories. (Baram, C, 2019)

CHAPTER 2.3

WHAT ARE CONSUMERS DEMANDING?

Research has outlined consumers wants. This includes:

Convenience:
Consumers are wanting convenience over anything else. They want to be able to purchase items quickly and efficiently. A report by Liz Bacelar (a pioneer in forging the gap between fashion and technology) stated that even when purchasing luxury brands the consumer does not want substandard technology impacting how quickly they can complete their purchase. They want to be able to complete their purchase as quickly as possible. (Suhrawardi, R, 2019)

A study conducted by the researcher: 'The future of the high street Consumers' thoughts and opinions' - outlined some key findings about what consumers want out of their shopping experience. (See Appendix 1)

The top three 'wants' of a consumers from a 'high street' shopping experience were;
- "a good experience",
- "being able to try items on"
- "having more choice on the high street".

Another factor that came from this primary research is that clothing available on the high street is of a "better quality" (See Appendix 1)

Further research found that people between the ages of 45-54 visited the high street more than the younger generations. This was described as a more age conscious activity to do.

From a focus group, when asked "where do you buy clothing" 60% said "on the high street", with one lady saying she does but "no longer enjoys the experience as its all the same." (See Appendix 4)

Reasons that influenced people to shop:	
Online	**Instore**
Mood	Prefer to try items on
Time	Price
Convenience- easy to find product	Promotion
Easy Access	Leisure Activity
"shop anywhere at anytime"	Quality
Can get items fast	Traditional
Influencers	Convenience – work in town
Social Media	Interaction with sales associates
Weather – if bad shop online	Experience
	Weather- if good shop on the high street

(See Appendix 1)

CHAPTER THREE

TO UNDERSTAND THE ONLINE RETAILING MARKET

CHAPTER 3.1

Figure 15

WHAT IS CURRENTLY HAPPENING WITH ONLINE RETAILING?

What consumers want from their shopping experience has developed and changed.
Primary research has shown that what consumers like about online shopping include, ease of access, convenience, easy to find products "shop anywhere, at anytime" and items that can be delivered quickly. (See Appendix 1)

Online retailing has been a major factor in the development of the retail landscape over recent years, changing the way consumers shop. Online retailing has the ability to incorporate a wide variety of product with fast delivery times making the online shopping experience one of convenience. (Lim, S. and Srai, J,2017)
With online retailers not having a physical presence on our high streets, fixed costs of renting in premium locations are not issues that they need to consider unlike bricks and mortar stores. This factor has allowed brands such as Pretty Little Thing and Boohoo to become leaders in the UK and Amazon a leader globally. (Marketline, 2017)

However, according to 'Online Retail Index', as of September 2019, whilst online sales have increased 0.6%, which is above the 3-month average, the percentage doesn't achieve the six- and twelve-month predictions. This indicates that online retailing is not thriving as it once was. Overall the clothing retail industry saw a drop of 1.2% year on year which is the first negative in over two years. (Jahshan, E, 2019)

Research has shown that the drop of online spending has come from factors such as retailers decreasing the amount of discounting that they do. In the past, consumers typically enjoyed shopping around trying to find the best prices on items, however with brands decreasing the amount of times they discount it has made consumers buy product when they see them. (Dover, S, 2018)

An app built through a smartphone allows consumers to try on clothes 'virtually' instead of just online in order to see what they look like on your body shape, as well as the material and how they fall. The London College of Fashion found that 60% of items bought online are returned thereby having this advancement in technology they believe that this will overall improve consumers shopping experiences. (BBC Click, 2019)

CHAPTER 3.2

FIGURE 16

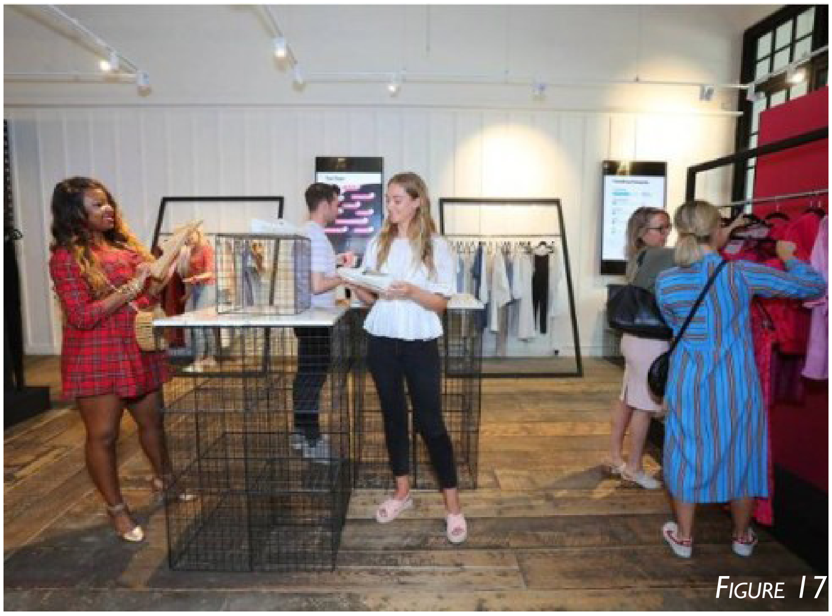


FIGURE 17


FIGURE 18

BREAKING THE BARRIER BETWEEN ONLINE AND BRICKS AND MORTAR

Predictions from research conducted by KPMG and Harvey Nash indicates that by 2024, one in five jobs, equivalent to 500,000 jobs will be replaced by robots due to the rapid increase in the development of artificial intelligence (AI).

With rapid change in the retail sector, businesses are concerned that humans do not have the skill set to do the jobs that the retail sector is now demanding. Because of this, it is reported that 45% of businesses have already begun improving their AI technology, as well as 25% of businesses outlining that they have already begun 'piloting process automation'. (Stevens, B, 2019)

AI is not only becoming increasingly popular with the back of house operations but with stores too.
Recently a pop-up store called 'The Trending Store' which was the first store to be powered by AI opened in London's Westfield Shepherds Bush Shopping Centre.

The concept of the store was to use technology to scope the latest trends via social media and be able to send consumers to stores in the shopping mall that harboured these products. This feature made a consumer's shopping experience quick, easy and convenient.

A trend that has arisen over the past few years according to 'Mintel's Trend Guide' outlines that consumer's want 'shortcuts in their decision making' and through the use of social media they collect and analyse data so that they are able 'cut out the noise' of unwanted products in store. 'The Trending Store' took this trend on board to create their concept. (Viberg, E, 2019)

CHAPTER 3.3

Figure 19

BUSINESSES THAT USE THE E-COMMERCE CHANNELS: NEW LOOK CASE STUDY

New Look- Analysis of profitability over the last two trading years:

New Look is a fast-paced fashion retailer, trading from 489 shops across the UK. Whilst for financial year 2019 (FY19), total revenues decrease by 3.9%, due to the restructuring of the business in 2018 the actual operating profit was a positive £30,814,000 (from an FY18 £45,312,000 loss). (NewLook Annual Report 2018/2019, 2019).

There was a decrease in standalone e-commerce sales of 7.2% along with web site traffic. However, e-commerce sales through key e-commerce partners such as ASOS and Zalando increased 11% from FY18 with mobile app sales also increasing, and now accounting for 10% of all online sales. Overall New Looks online business improved by 78% from 2018.
This is an example of how, through collaboration with existing successful online retailers and the development of a good mobile app, a brand can increase its online sales. (NewLook Annual Report 2018/2019, 2019).

Click and collect' sales accounted for 41% total of all e-commerce sales (FY18 36%) and 64% of all e-commerce returns were made in store (FY18 57%). (NewLook Annual Report 2018/2019, 2019).

The company are focused on aligning the in store and online service ensuring that customers are receiving the same price and opportunities regardless of what method of shopping they choose. The click and collect service along with the online in store return service has helped to drive footfall into their shops.
They are looking to enhance the in-store shopping experience throughout 2019 and are launching an order and deliver in store to ensure the customer experience is relevant and accessible to all. (NewLook Annual Report 2018/2019, 2019).

This is an example of how a retailer can adapt to a consumer's change in shopping habits and how the online and high street shopping experience can align. (NewLook Annual Report 2018/2019, 2019).

CHAPTER FOUR

TO UNDERSTAND THE IMPACT OF VISUAL MERCHANDISING ON CONSUMER SHOPPING HABITS


NETFLIX
STRANGER THINGS
RUN
TOPSHOP
TOPMAN
NETFLIX
STRANGER THINGS

FIGURE 20

The use of Audio Visual (AV) Technology is an important method of engaging with the consumer.
AV engages with an individual's emotion, evoking a change in their mood, even making them 'feel good'. By attracting their attention, it creates in an interest in what is being promoted, raising the imagination of the consumer - imagining themselves wearing the product or outfit making them more likely to purchase the item(s). (Reynolds, M, 2019)

A Drapers article in 2019 discussed why the Oxford Street branch of Topshop is such a success compared to other Topshop stores.
It discussed the vibrant posters urging shoppers to 'snap and share' - taking photos of themselves in-store to share online. The loud and atmospheric feel of the store with live DJ's give the consumer more of an experience and a reason to shop there.
The visual merchandising is seasonal and relevant. Innovative ideas such as a virtual waterslide and 3D scenes from 'Stranger Things' look to engage the consumer offering them more than the mundane and dated offering of their sister company Miss Selfridge occupying the space next door. (Sutherland, E, 2019)

This all contributes to the positive psychology behind the shopping experience.

Figure 21

Figure 22

Figure 23

CHAPTER 4.1

Studies into how to deliver successful instore merchandising have used 'behavioural science' to understand the impact in store merchandising has on the consumer. Whilst the use of colour, store layout and video displays can influence the shopping experience, there are other factors that can also provide a positive experience. (Krywulak, C ,2017)

The aim of the visual merchandising is to inspire the consumer and to help create a positive impression of the brand whilst increasing the amount spent.
Tracy Flynn Downing from a leading visual merchandising Company -Ace Designs details

"small details make the largest impact" "the angle of a shirt displayed on a table creates the illusion of something laid back as opposed to something crisp and structured"

It can create an image for the consumer so they actually visualise where they would wear an item.

"roll up the sleeves and you are going for a breezy walk along a beach"

Good Visual Merchandising can transport you from simply viewing a piece of clothing to imagining yourself actually wearing it and the occasion where you would. (Visual Retailing, 2017)

FIGURE 24

FIGURE 25

PSYCHOLOGY BEHIND VISUAL MERCHANDISING

First impressions really count. A shopper on average spends fifteen seconds at a display noticing less than 40% of the products on display, therefore visual merchandising should be set up to create a memorable first impression. New products and best sellers should be displayed at the front of the store attracting the consumer. (Krywulak, C ,2017)

Good signage is also key as consumers don't want to waste time. The consumer generally looks left to right when entering a store so signage should be at eye level giving clear instruction as to the department's location. (Krywulak, C ,2017)
(Using the 'Rule of three') is a proven successful way to display items
By displaying in sets of three - 3 products different heights side by side draws the consumer to the display. (Chen, N, 2015)
The Pyramid principle' has the largest item as the centre piece with smaller items displayed on the outside of the centre piece. (Chen, N, 2015)

Using the senses of the consumer - items to feel, touch, unfold gives the consumer a connection to the item. (Krywulak, C ,2017). Studies have shown that curved displays, open shelving encourages the consumer to pick up and feel a product enhancing the shopping experience. (Krywulak, C ,2017)

Another way to increase sales through visual merchandising is by using a method known as 'clustering'. Research shows that 80% of all purchases are on impulse.
Creating a 'scene' and showing the consumer ways to wear items together entice them into buying whole collections as opposed to just one item.

Debra Templar owner of the Templar Group says –

"visual merchandising can transform a shopper into a buyer" "The power of visual merchandising is silent selling at its best"

The consumer in 2019 has so much choice that they are looking for a shopping experience and Visual Merchandising is a way of facilitating more than just buying an item. (Visual Retailing, 2017)


Figure 26

Primary research conducted by questioning Huw Hughes (a Retail Expert) who has written for Fashion United concurred with the importance of visual merchandising and the importance of the physical experience of the store. (See Appendix 5)

"At the moment, yes. It's hard to say how long the trend will last but it's noticeable that a lot of the retailers thriving right now are focusing on making their physical stores attractive, fun and engaging places to visit. Stores that go the extra step to entice customers to visit and to stay inside will beat ones that offer no real benefit to online competitors."

CHAPTER 4.2

Figure 27

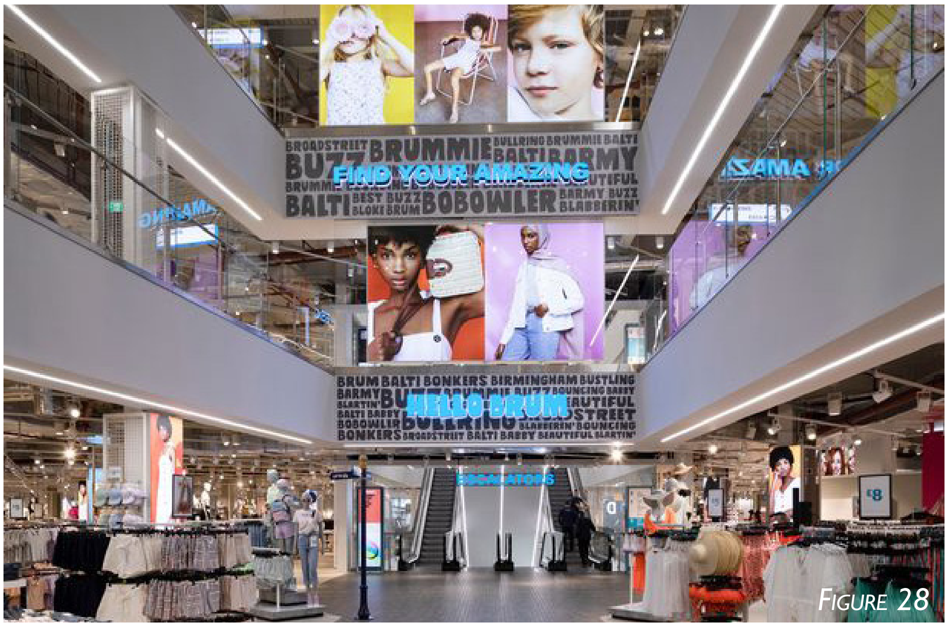


Figure 28

Figure 29

THE PHYSICAL STORE

Both Primark and H &M in Birmingham both have adopted this philosophy.
H & M have their new lines displayed in the store window as well as being on display as soon as you walk in. (See Appendix 6)
Primark have their 'Stacey Solomon' collection and those items that have been featured in Glamour magazine are in a prominent position at the front of the store. (See Appendix 6)

Primark has a clear focused business model; they have taken the time to understand their customer and built their business around it. The new store 'inspires the consumer to browse' and 'experience retail' and given them the opportunity to increase sales through the 'emotional spending' of their customer. (BBC News, 2019)

It houses an official Disney café, restaurant, barber shop, beauty studio along with the full range of Primark fashion and homeware.
The Disney café is strategically placed on the same level as the kids wear department utilising 'family footfall' to both aspects.

The new store is light and airy, using visual merchandising to create a journey throughout the store, using 'Trending Now' displays to utilise the concept of 'Clustering' enticing the consumer to increase their spend. (Nazir, S, 2019, 1)

In 2018, a trend that seemed to arise was a gradual move back to physical stores but with a new look to the stores. (Marketline, 2018, 1)

The report by KPMG also forecast that the fast-developing trend of online shopping (currently 18% of all retail sales) over the next 5 years will see a swing back to the physical shopping experience. Consumers will not only want a more tangible experience, but they will also become more aware of the environmental impacts of home delivery as well as realising the 'social, sensory and practice benefits of real shopping'.
(Retail Think Tank KPMG| Ipsos Retail Performance. (2018).

CHAPTER FIVE

TO CONSIDER HOW THE HIGH STREET CAN ENSURE LONG TERM AND ONGOING SUCCESS

CHAPTER 5.1

Figure 30

GOVERNMENT FUNDING

"Our high streets are right at the heart of our communities and I will do everything I can to make sure they remain vibrant places where people want to go, meet and spend their money. This scheme is going to re-energise and transform even more of our high streets- helping them to attract new businesses, boost local growth and create new infrastructure and jobs"

– Boris Johnson. (Wood, Z, 2019)

To ensure that our high streets are able to succeed in the long run, they need to be able to adjust in order to match with the modern way of shopping- this could be done using government funding and through the use of technology to create stores that offer an innovative experience.

This said scheme is to put £1billion into towns and cities across the UK in an attempt to regenerate them and help tackle the problem of retail sales moving online. (Wood, Z, 2019).

Sixty-nine high streets across the UK are due to get this funding. The Midlands are set to receive the most amount of money with £21.1 million; this will be used to restore and preserve classic historic towns. (ITV News, 2019) The amount of money that has been proposed to be given indicates that our high streets require immediate help. A similar scheme "Save the high street" conducted by Mary Porta failed, with 1 in 5 shops closing in our towns since 2012. Porta outlined that substantial help was never given and the government never put measures in place to ensure it succeeded. (Morley, K, 2017)

The idea that the government is backing the new grant needs to have a plan in order for it to be achieved.

FIGURE 31

I think business rates should be lowered so retailers aren't driven into the ground by taxes. The playing field needs to be levelled between online and physical retailers, one way would be through a tax on online retailers. When it comes to fashion, I think better sustainability standards could help high street fashion retailers. I think if more regulations were implemented concerning sustainable manufacturing and ethical working standards then fast-fashion companies would no longer be able to churn out t-shirts for a few £ a pop. This would then increase their price points and align them more with those of other high street retailers."

"Across the country, local councils have taken action into their own hands, buying and regenerating shopping centres. It's a risky move though as much of the money they get is borrowed and they can't be guaranteed a return on investment." "I do think the government and local councils, if they work together, can help it through this difficult period."

- Huw Hughes a retail expert has confirmed the need for councils to do more to help retailers on our high streets. (See Appendix 5)

CHAPTER 5.2

WHAT ARE BRANDS CURRENTLY DOING?

Stores are ensuring they can withstand the current market by creating stores that use new technologies and experiences to encourage the consumer to their physical stores. Toys R Us, Selfridges and Zara are all examples of this.

Toys R Us

In April 2018, the brand Toys R Us closed its doors, after falling into administration. (Rutter Pooley, C., 2018) Since their collapse, their parent brand 'Tru Kids Brands' opened new concept stores in Texas and New Jersey in the US, which were a series of 'immersive smaller spaces'.

These spaces were designed to be highly interactive and allow children to try before they buy. By changing the store from its traditional concept made it more engaging for the consumer. Vibu Norby, CEO of b8ta says "The new Toys R Us stores will be the most progressive and advanced stores in its category in the world". (Houghton, L. and Friend, H, 2019)

FIGURE 32

Zara’s click and collect

Zara introduced a pop-up store in Westfield shopping centre, London, stocking ‘online exclusives.’ This allows the consumer to see these exclusive items in a ‘physical setting’ and order the online items into store.

This idea allowed Zara to intertwine their online and physical retail space, becoming a ‘service led space that supports e-commerce habits’. They work with online rather than against it. (Scott, R. and Walker, J, 2019)

By doing this shows one of the many reasons upon why Zara are a brand that continually performs well in the retail sector. (Dover, S, 2018)

FIGURE 33

FIGURE 34

Selfridges in incorporating a cinema and skate bowl

Selfridges has taken a different approach to increase their consumer footfall. They are set to open a permanent cinema that can be accessed from both the street and the store. This concept is being introduced in order for them to continue to broaden its 'experimental retail offering.' (Whelan, G, 2019)

This isn't the only innovative experience that Selfridges offers. In October 2019, they introduced a permanent skate bowl which they used to showcase their new 'designer street menswear space'.

Previously the brand 'Vans' created something similar, whereby they combined retailing with a skate park to turn 'shopping' into a retail experience. (Lowrey, T, 2008).
These new innovative spaces are essential in providing the consumer with new and exciting experiences. (Whelan, G, 2019)

Selfridges aren't just introducing experiences to their stores but are also making efforts with their e-commerce channels to tackle the factor of failings in department stores. Through shipping product to over 130 countries, it has 'boosted its popularity'. Positive responses have resulted in department store John Lewis to follow in suit. (Marketline, 2018, 2)

FIGURE 35

FIGURE 36


FIGURE 37

CHAPTER 5.3

The demand for transparency has become increasingly popular over the past few years. Consumers are becoming more aware of issues and like brands to be transparent with them through outlining where items are made and how they are made. Consumers are constantly 'concerned over issues such as fair labour, sustainable resourcing and the environment' therefore brands are needed to be honest to gain consumers trust. (Amed et al., 2019)

London Fashion Week used a panel discussion called '#positivefashion' to outline the importance of sustainability and how the retail sector needed to take 'immediate action'. The idea that we need to "turn sustainability from a niche to a norm" was outlined. With London Fashion Week being one of the largest fashion events in the world, it sent out a message to what direction the fashion industry is heading in. (Nazir, S, 2019, 2)

Stella McCartney is one designer who has sustainability at the forefront of her designs. In 2005 she designed a capsule collection for H&M using organic cotton and with her collaboration with Adidas she insisted on no PVC. In 2017 her Adidas Boost X sports shoe was made with thread and yarn made from plastic recovered from the Ocean. She encourages the consumer not to buy fast fashion. (Thomas, D, 2019).

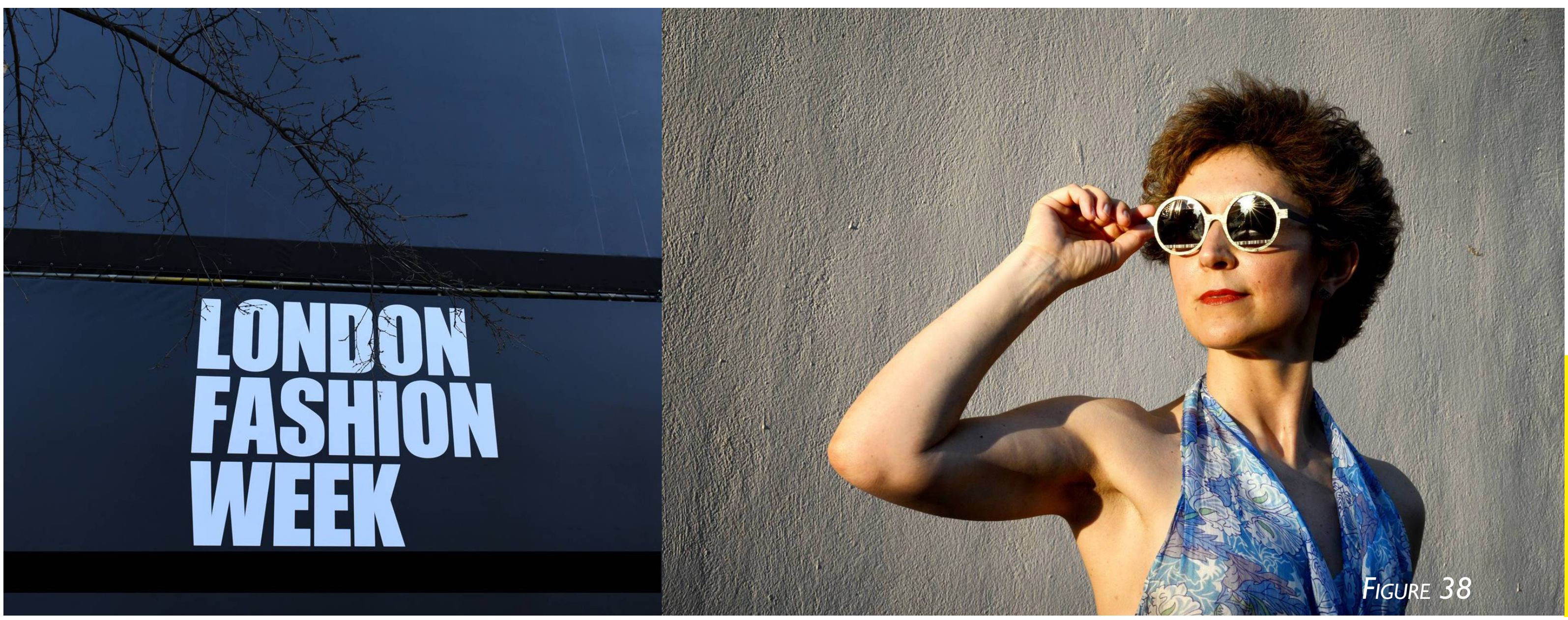


Figure 38

THE NEED FOR SUSTAINABILITY

FIGURE 39

FIGURE 40

"Instead of buying five hundred things for x amount, ie fast fashion- buy fewer things that will last longer and serve you well for a long period of time"

- Stella McCartney
(Thomas, D, 2019)

CHAPTER 5.4

Figure 41

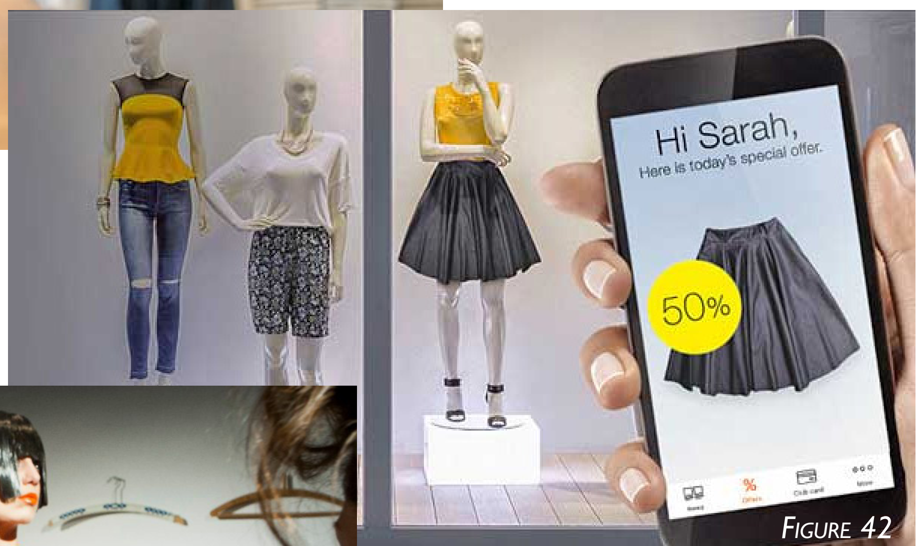


Figure 42

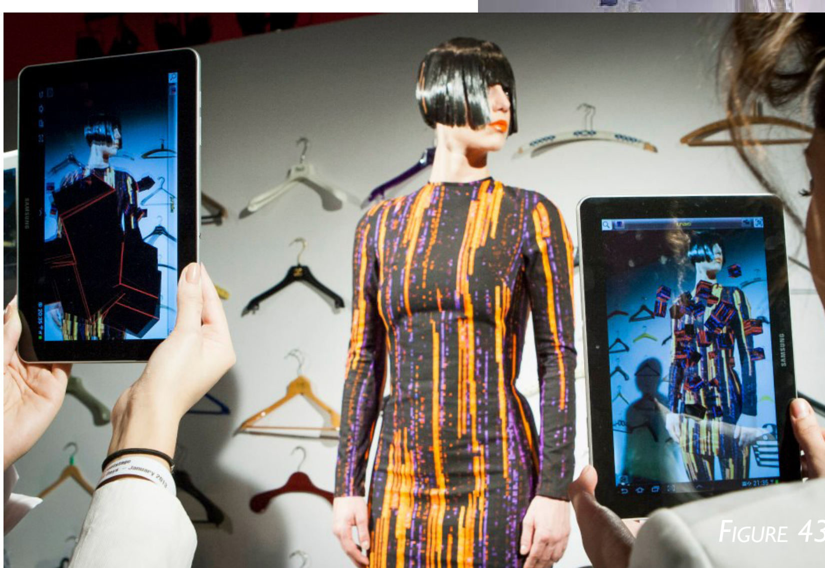


Figure 43

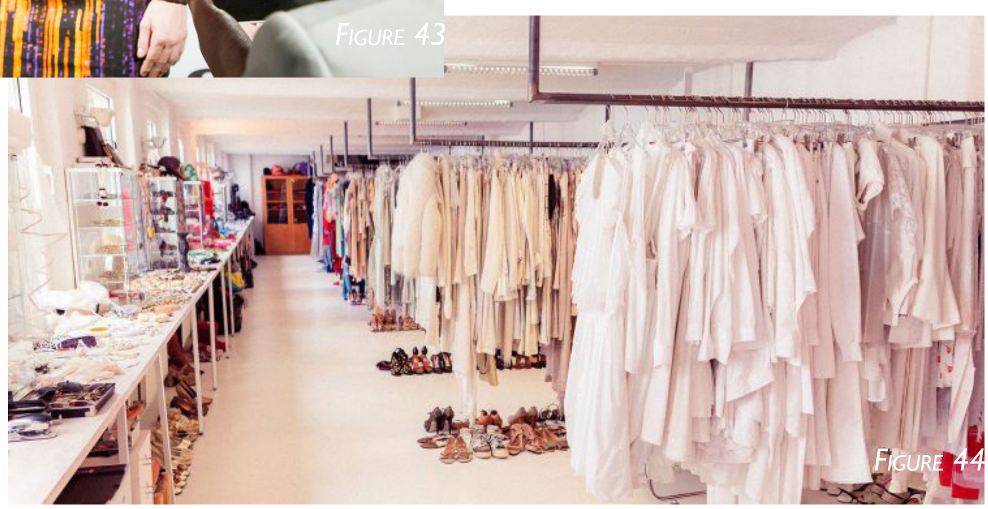


Figure 44

THE NEED FOR TECHNOLOGY

The need to enhance the shopping experience ultimately comes down to the advancements in technology. One aspect of this is virtual reality, that will allow the shopping experience to be smoother and more efficient. (Marketline, 2018, 3)

Virtual reality has become increasingly popular over the past few years in sectors such as gaming but has recently took its place in the fashion industry.
Previously, using virtual reality in the fashion industry was a difficult and lengthy process to do, however, with technology found by 'The London College of Fashion'. They have been investigating how 'mixed reality' can change the online shopping experience for when consumers need to try on clothes.

Apps in the retail sector are not just used for virtual reality, brands using them are becoming increasingly popular.

High Street stores are beginning to use them to incorporate an online experience within their stores to ensure that consumers buy items that they want even if stores don't have it physically in stock. (Marketline, 2018, 4)

Examples of brands that take this approach include; Topshop, Office, Schuh, Zara, Next and Kurt Geiger. All of these brands go above and beyond to make sure that consumers are always getting what they want out of their shopping experience. (See Appendix 6)

A new, smaller trend that is slowly beginning to grow is the renting of clothing. This concept is done by consumers renting items of clothes through monthly subscriptions, whereby of three items can be purchased each time. This feature allows consumers to always have the latest fashion trends whilst be environmentally conscious. (Houghton, L. and Hawkins, A, 2019, 2)

CONCLUSION

Is the high street failing?
In conclusion it can be ascertained that there are challenges for the high street, ranging from economic factors to the changing wants and needs of the consumer. From primary research we can conclude that the consumer still takes enjoyment from the shopping experience. They enjoy browsing and trying on items.

This high street shopping experience aligns to the reasons behind its evolvement back in the 1900's; individuals enjoying the shopping experience, shopping for leisure as opposed to need.
Looking at secondary research some high street retailers are adapting to the threat of online shopping by looking to embrace the online flexibility into their bricks and mortar store.

One interesting perception gained from primary research is that high street retailers offer a better quality of product compared to online retailers. However, in many instances the product is the same.
As more and more individuals are becoming increasingly environmentally conscious, retailers have the opportunity to build on this quality perception resulting in a positive concept for the high street shopping experience.
By incorporating the advancements in technology such as purchasing in store, having goods delivered to store through click and collect and in store returns, support the conclusion that the consumer has no issue going onto the high street, it is more the aesthetics of the high street offering that has resulted in a decline.

The likes of Primark have adapted to enhance a consumers shopping experience by , adopting better Visual Merchandising and store layouts and offerings within their stores.

FIGURE 45

Primary and secondary research has also shown that high overheads such as rent, and rates have also had an impact on high street retailers. The government and local councils need to provide more solutions to support the high street retailer. The government paper has certainly made these recommendations.

Primary research has shown that the consumer likes the experience of shopping, to browse and try items on and they perceive clothing from the high street is of a better quality. Stores can build on this. We have recognised that the consumer uses online shopping but also uses click and collect. An option is for stores to combine the two more. Buying products online but collecting and having good facilities to try on could potentially reduce the need to hold so much stock, therefore reducing the shop square footage and rent and rate costs, thus reducing fixed cost which could result in an increase In profitability.

In conclusion, it is evident that today the consumer has more and more choice on how they choose to shop.
The facility to shop online is a major threat to the high street. However, we know that consumers still value the high street shopping experience so by combining and embracing both aspects of shopping, retailers have a real opportunity to future proof their high street presence.

FUTURE RECOMMENDATIONS

This study has raised questions on how enhancements can be made to the high street shopping experience to ensure it meets the wants and needs of today's shopper and be sustainable for the shopper of tomorrow.

Future studies into the following areas will assess how the current and future needs of the consumer can be met by the High Street retailer.
These include:

1

Enhancements to the 'Click and Collect' experience whilst utilising the convenience of 'online shopping' with physical 'bricks & mortar' instore shopping. As mentioned in the study, Amazon are a brand that have previously utilised the online and physical shopping experience, when they opened stores in towns that had a struggling high street. The idea was seen to be popular and successful which is why there is a definite need to combine the two.

2

Retail spaces to become more innovative through using virtual reality and through the use of more retail space to engage with the consumer, thus turning 'shopping' into more of a leisure experience. Through incorporating the ability to 'see' what clothes look like on the body before actually trying them on, is a concept that many retailers have the ability to utilise in order to make the shopping experience more innovative.

3

As the study outlined, consumers demand convenience. This demand can be addressed if brands use apps in retail stores to offer the consumer a chance to order product if what they want is not directly in front of them. Already a number of retailers are currently using apps, but more retailers could be utilising them in order to ensure the shopping experience of the consumer is as easy and convenient as possible.

4

The idea of rental clothing to engage with the consumer's desire to embrace sustainability. The concept would be for the consumer to rent clothing as opposed to purchasing outright. They could 'rent' an item for a set period of time. This would allow them to have access to the very latest fashion trends, possibly even designer brands at a more affordable and cost-effective price. This could provide a forward thinking and innovative experience that could ultimately be developed in the future for high street brands. This would make shopping more sustainable, since there would be less fast throw away fashion and certainly a concept worth future research.

5

Greater efforts of brands being more conscience of the consumers growing desire of sustainability and the transparency of brands in the manufacturing process. Brands that showcase where items are made and what they are made from are seen to be the brands that are favoured by consumers allowing them to thrive in the retail sector. The study shows that two brands that are excelling are Primark and H&M who are open and transparent. Future research into the importance of this area to the consumer should be explored.

6

The development of AI within the retail sector has been discussed within this study. As a growing trend, future research in how AI can assist both the retailer and consumer is an area for exploring. For example, if AI was so advanced that it could recognise individual categories of shopper as they entered a store and target them with relevant product, how would this affect the shopping experience, and would it increase profitability for the retailer? With continual advancements in technology this is a concept that is worth exploring.

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This website was used as it helped when trying to understand what current brands are doing to their stores to make them more appealing. From this document, Topshop was the brand that was used as an example.

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(Stevens, B, 2019) 500,000 UK retail jobs to be replaced by robots by 2024 - Latest Retail Technology News From Across The Globe - Charged. [online] Latest Retail Technology News From Across The Globe - Charged. Available at: https://www.chargedretail.co.uk/2019/10/24/500000-uk-retail-jobs-to-be-replaced-by-robots-by-2024/ [Accessed 6 Nov. 2019].

This website was used because it gave an insight into what will be predicted to happen in the future as well as how these predictions are effecting the retail sector now.

Thomas, D. (2019).
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This book was used as it gave the information into the future of the fashion industry. This gave me the ability develop ideas further within the study.

(Turn Back Time: The High Street Edwardian, Episode 2, BBC1, 2011)
Turn Back Time: The High Street Edwardian Episode 2 (BBC1). (2011). [video] BBC One: BBC. Available at: https://vimeo.com/39304268 [Accessed 16 Nov. 2019]

This video was used because provided knowledge into what the high street was like in the past. It was interesting as it showcased modern day people attempting to replicate the past. Even though it aired in 2011, the context is about the history of the high street so still holds great relevance.

(Viberg, E, 2019)
(Viberg, E, 2019) First AI powered store is launched at Westfield Shepherd’s Bush, London - 26th July 2019. [online] Mintel Academic, p.1. Available at: https://academic.mintel.com/display/967068/?highlight#hit1 [Accessed 2 Nov. 2019].

This report was used because as Mintel is handy source when looking for reliable data. It showcased what is currently happening in stores and how AI is beginning to have more of a presence in our retail stores.

(Visual Retailing, 2017)
(Visual Retailing, 2017) Visual Retailing — 7 Inspiring Visual Merchandising Tips from Leading Experts. [online] Available at: https://visualretailing.com/blog/2017/8/7-inspiring-visual-merchandising-tips-from-leading-experts [Accessed 21 Nov. 2019].

This website was used because it allowed insight into what the best visual merchandising techniques are to be used in a store to engage consumers- these tips allowed me to support points made and expand research further. Even though the information is from 2017, the information is still relevant.

(Whelan, G, 2019)
Whelan, G. (2019). Selfridges to open a cinema. [online] Drapers. Available at: https://www.drapersonline.com/news/latest-news/selfridges-to-open-a-cinema/7037513.article [Accessed 7 Oct. 2019].

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Wood, Z. (2019). Boris Johnson gives struggling high street fund pre-election boost. [online] the Guardian. Available at: https://www.theguardian.com/business/2019/aug/26/struggling-high-streets-fund-increased-to-1bn [Accessed 10 Oct. 2019].

This website was used because as it gave an insight into what the government are doing to tackle the issue of high streets that are struggling. As the information came from The Guardian, the facts gained are reliable and accurate.

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APPENDICES

APPENDIX 1

A questionairre was produced by researcher and was answered by 100 people.
The name of the questionairre was The future of the High Street: Consumers' thoughts and opinions.
It was shared across social media channels, LinkedIn, a Student Dissertation forum, office email circulation and high street face to face questioning. This was to ensure that the views of a broad demographic of individuals were obtained, including age and gender.

The results have been calculated and put in percentages to show the clear seperation of opnions.

2. Age Range	
16-24	41%
25-34	20%
35-44	12%
45-54	17%
55+	10%

1.What gender you identify by?		
Male	Female	Other
32%	68%	N/A

3. Where do you mainly purchase items of Clothing	
High Street	46%
Online Retailer	54%

4. Does this method of shopping change dependant on the occasion you are buying for	
Yes	35%
No	49%
Sometimes	16%

5. What is the main influence for your method of shopping	
Trying on/feeling & seeing the item	37%
Convenience	34%
Leisure & social activity	9%
Variety of product on offer	7%
Price & Promotion	6%
Weather/Mood	4%
Other	3%

6. What are the factors that are most important to you when shopping?
Results in order of preference:
Value/Pricing
Convenience
Quality
Experience
Variety on offer
Sustainability
Styles on offer

7.What are you expectations from an online and high street shopping experience	
Try on	**16%**
Layout of store & ease of naigation	4%
Value for money	4%
Available choice	16%
Good shopping experience	20%
Quality of product	10%
Convenience/quicker to buy	10%
Visual merchandising/seeing/feeling the trend	8%
Customer service	12%

8.What changes (both positive and negative) have you experienced on your high street over the past 5years?			
Negative		**Positive**	
Too many shops closing	38%	Better stores/ layout and displays	24%
Not enough choice and poor quality	31%	More variety	18%
Throw away fashion	7%	None	13%
Too expensive	5%	Social experience/leisure activity	11%
Poor parking	4%	Better delas & competaitive pricing	10%
Poor customer service	5%	Less crowded	8%
Too quiet	4%	Sustainable clothing ranges	7%
None	4%	Better customer service	6%
Other	2%	More innovation	3%

9.What would be the one change you would make to your high street	
Different type of shops & more targeted choices	47%
Better in store experiences & e-commerce experiences	37%
More sustainable type shops	4%
Cheaper rents	4%
Free parking	8%

10.Do you believe that the high street shopping experience will ultimately be replaced by online shopping?	
Yes	**54%**
No	**46%**

APPENDIX 2

Observation- House of Fraser Store managers and staff members

Footfall the the store – extremely quiet, limited people shopping

There was a lack of music in the store. The product in store felt very confused, a lot of product consisted of 'typical' sports direct product such as tracksuits and sports wear but right next to it had classic mature women's clothing brands.

Nothing felt new in store, the stock was from last season.

Staff felt uneasy and have been feeling unsettled with the current state of their store. They feel that their jobs are at risk and have seen the high street deteriorate considerably.

The store has seen changes according to staff. For quiet a months they haven't had any music playing which left the store an a boring and awkward place to work. "You only have to move and you feel like everyone can hear what you're doing".

Managers- Footfall has decreased sufficiently over the past four years . Targets are becoming harder to beat year on year. Summer period this year has been slow. Music being off has only amplified how quiet the store has become, however the lead up to Christmas is also busier than the rest of year.

APPENDIX 3

Observation- House of Fraser Wolverhampton Consumers

Talking to consumers they told me that the department store felt 'sad' and it was a shame that such an iconic store was becoming a ghost town.

Other people told me that:

- "Its never been this bad"
- "I've been shopping in this store all my life (50+years), I remember the days that it thrived and was so busy, it's so sad we haven't got this anymore. It's hard to watch the store fail"
- "It's so quiet"
- "It's doesn't feel like a department store any more, it just feels like an extension of sports direct"
- "Having no music is making the store feel more depressed- it's kind of awkward"

After discussing with customers about the upcoming closure of Debenhams across the street (House of Frasers biggest competitor) and was the space HOF was moving as a new concept store 'Frasers', they felt 'excited' and 'intrigued to see what was going to happen'.
They hoped that this change would increase the footfall in the town as over the past five years they have seen the shopping experience become one that they didn't want to be part of.

Even though they were worried about the change and felt upset that the iconic Beatties building g was being left behind, being in the newly developed Mander centre would be a move in the right direction. After it was due to close last year, they are just happy it's being saved, no matter the location,.

APPENDIX 4

Focus Group- Thursday 21th November 19
Wombourne, United Kingdom

Participants:
Nancy [63], Danni [32], Gail [56], Georgia [17] & Leanne [29]

Q1. Where do you buy your clothes?
N- high street
D- High street
G- High Street
G- Online
L- Online

Q2. Why do you use that method?
N- I always have- wouldn't shop on the computer as I don't trust them. Have to say I no longer enjoy the experience as its all the same. There's nothing new
D- I like having a wonder
G– something to do
G- clothes are cheaper and more on trend
L- more choice and more convenient

Q3. When you go into a store what do you or would you like to see?
N- It's all on one level and easy to find things
D- Bigger sizes available and advertisements that feature larger women
G- When they have lots of different brands all under one roof
G- When there is something going on instore like DJ's. Have you been to Topshop in London, I love that shop. It's my favourite and go to shop when I'm in London. Nothing round here is like that.
L- I like to the outfits put together on mannequins

Q4. How do you see the future of the high street?
N- The same really
D- more independent stores on the high street catering for the larger woman
G- Think they need to sort out the empty before they do anything else- its off putting
G- Make the high street a day out rather than just a boring shopping street
L- Think online will take over as its cheaper

<u>APPENDIX 5</u>

Interview conducted: 11th November 2019- 3.54pm with
Huw Hughes, Fashion United, Retail Expert

Code:
HL- Holly Lacey, Researcher
HH-Huw Hughes, Retail Expert

HH- Hi Holly, Hope you had a nice weekend. I've written up answers to the questions you provided. I'm not sure how they will be used so I haven't written them in the most polished way possible, they're more stream of thought. Also as I think you can guess I only write about fashion retail - admittedly that does span quite a lot of retail and touch on a lot of the issues you asked about but I don't have as wide a knowledge of the overall retail industry as others might have). Let me know if you have any follow-up questions or if you want me to clarify anything for you!

HL- What are the 3 most significant changes you have seen across the high street over the last five years?

HH- Reduced footfall, more store closures, more experiential stores.

HL- Do you feel that visual merchandising and in-store experiences are a major factor in the success of a retail business? If yes why?

HH- At the moment, yes. It's hard to say how long the trend will last but it's noticeable that a lot of the retailers thriving right now are focusing on making their physical stores attractive, fun and engaging places to visit. Stores that go the extra step to entice customers to visit and to stay inside will beat ones that offer no real benefit to online competitors. Of course, trying on clothing is also a benefit of brick-and-mortar stores, but with the increasing frictionless of deliveries and returns, this factor isn't as important as it once was.

HL- What would you say are the major factors that contribute to high street store closures?

HH- More shoppers are shifting online for lower prices and more convenience. An increase in competition from online fast-fashion giants. Falling footfall. Increasing business rates.

HL- Do you feel that online shopping is a major contributing factor to the recent failures of high street stores?

HH- Absolutely. The convenience of shopping online paired with the low prices offered by online retailers is leaving many physical retailers struggling to keep up.

HL- From your knowledge of the retail sector do you feel that the 'high street' will remain in its existing form ten years from now?

HH- I think it is hard to say but I would guess that it will look very different in ten years from now. I think many old retailers will be forced into administration - we're already seeing this at an alarming rate. I also think the trend of experiential retail is only going to increase. I think stores will decrease in size and hold less inventory than they do today, instead focusing more on customer experience and personalised services such as styling consultations, repair and returns.

APPENDIX 5 CONTINUED

HL- What changes (if any) do you feel is needed across the high street in order to ensure long term success?

HH- (These are all very speculative because it is such a multifaceted and complex issue that spans the whole of retail and I only really focus on fashion but here goes): I think business rates should be lowered so retailers aren't driven into the ground by taxes. The playing field needs to be levelled between online and physical retailers, on way would be through a tax on online retailers. When it comes to fashion, I think better sustainability standards could help high street fashion retailers. I think if more regulations were implemented concerning sustainable manufacturing and ethical working standards then fast-fashion companies would no longer be able to churn out t-shirts for a few £ a pop. This would then increase their price points and align them more with those of other high street retailers. In general, I think high streets need to be converted into hubs where people want to visit, hang out and explore, not simply places to buy things and leave. If they are only the latter, then online will come out on top. They should become communal places with engaging and interactive stores.

HL- Do you feel that local councils and planners play a contributing factor in the success of a 'high street' and what could they do to assist the retailer?

HH- Yes. Across the country, local councils have taken action into their own hands, buying and regenerating shopping centres. It's a risky move though as much of the money they get is borrowed and they can't be guaranteed a return on investment. 8. In your opinion is the 'high really street failing as reports have claimed? If yes, what would you say are the contributing factors? It depends on what you mean by failing. I think it is certainly struggling. I think that if it continues the way it is going, with the number of administrations, job cuts and store closures, then it's future is bleak. I do think the government and local councils, if they work together, can help it through this difficult period. How exactly, is hard to say.

APPENDIX 6

Observation walking around city centre – Birmingham

After walking around the town centre of Birmingham, looking at the visual merchanting of the stores of Primark and H&M both have all of their new lines at the front of the store, right by the entrance. In Primark, the Stacey Solomon collection was at the fore front. These lines were also in Glamour magazine.

Brands that I found used an online apps included: Topshop, Office, Schuh, Zara, Next and Kurt Geiger. The apps allowed you to order stock into store if they didn't have the product available to buy.