Cluster 1: Local retail & service centres (1189 centres)

Small local centres typically located in larger urban areas half of which are in Greater London (599 centres). Large number of local competitors. Highly independent with limited offer which typically is oriented towards household and consumer services serving local communities. Also of high importance is local leisure offer, in particular there is highest proportion of cafes, fast food and take away food outlets and pubs; also popular amongst betting shops, chemists plus hairdressing and health & beauty salons. Large corporate stores almost non-existent. Their catchments are relatively small and on average comprise higher income patrons; however, the average unemployment and crime density are high too.

1.1 Diverse urban service centres (328 centres)

Slightly more upmarket minor district and local centres in densely populated urban areas (approx. 200 in Greater London). More diverse than the remaining sub-clusters and they mainly comprise independent retailers and small multiples. These centres are popular with health & beauty salons, especially hairdressers, independent fashion shops, florists and newsagents. Also household services such as dry cleaners, locksmiths and consumer services including estate agents, banks, post offices are popular occupiers. Convenience retail offer includes some convenience stores, CTN stores and supermarkets; particularly high proportion of wine and spirits stores. Also higher proportion of betting shops, pubs, cafes, fast food takeaway outlets and comprise a number of restaurants.

1.2 Local urban convenience centres (535 centres)

These centres are typically located within the primary and secondary urban areas. They typically comprise a mixture of small independent retailers, service and leisure providers. Popular local leisure and entertainment destinations typically comprising fast food take away outlets, betting shops and pubs but fewer restaurants. Second important function is convenience with provision of groceries typically comprising a multiple convenience store or a small supermarket and a number of other stores such as chemists. Also some comparison retailing is present such as electrical appliances stores, household goods and charity shops. Lower number of off licence stores, charity shops and health & beauty outlets.

1.3 Inner urban service centres (326 centres)

Typically, very small local centres and shopping parades (23 units on average) very specific to the UK's largest inner urban areas, predominantly Inner London (203 centres). Highly independent offer but less diverse. Usually, these centres are dominated by restaurants, takeaway and fast food outlets, independent coffee shops and pubs but also household services such as laundrettes or drycleaners. Retail function (A1) is of marginal importance in these centres with few comparison and convenience goods shops although it typically comprises a small convenience store. Also substantially fewer bookmakers, health & beauty salons or charity shops than in other supergroups of this cluster. Lower vacancy rate

Cluster 2: Retail, shopping & leisure parks (274 centres)

These are out-of-town centre comparison-oriented destinations with convenient parking facilities. The offer is dominated by large multiple retailers with high proportion of anchor stores, large mass but also value brand retailers typically merchandising house, clothing and electrical goods. Leisure offer is also present and is dominated by chain restaurants and coffee shops. The vacancy rate is typically low and number of service providers is very limited.

2.1 Retail shopping & leisure parks (97 centres e.g. Aintree Liverpool)
Retail and shopping parks with broader offer and higher number of stores, more dominant around the major urban areas therefore have larger catchments and may face stronger competition from other comparison retail destinations; slightly higher vacancy rate. Alongside the usual retailers such as DIY, furniture or electrical appliances they also more likely to comprise a department store such as M&S, Matalan or John Lewis Home. They also contain a higher proportion of mass brand fashion and footwear retailers as well as large multiple chemists, sport and recreational goods and restaurants. Very low proportion of DIY and household goods stores.

2.2 Less diverse retail shopping & leisure parks (177 centres e.g. Botley Rd Oxford)
These retail and shopping parks are distributed more evenly around medium and large urban areas, on average they are slightly smaller and contain less diverse retail offer concentrating around DIY and household goods stores, furniture, electrical appliances and supermarkets. There are more consumer and household services present such as travel agents, locksmiths or auto services as well as health & beauty outlets. The leisure offer is less important and comprises fast foods outlets, chain coffee shops and some chain restaurants.
There are fewer department stores, fashion and footwear retailers.

Cluster 3: Leading comparison & leisure destinations (446 centres)

Located across the country, typically these are the main retail centres in a particular urban area including some larger market towns. Top shopping destinations with comprehensive retail and leisure offer serving large catchment areas. Typically, they are home to large multiple retailers and service providers including department and various anchor stores. Mass retailers, value and premium brands are well represented. Retail diversity is high; these centres are well-known destinations for fashion, footwear, electrical appliances, sport & hobby goods. Also strong destinations for services such as health and beauty s, business services and leisure including bars, restaurants and entertainment -often national chains.

3.1 Premium shopping & leisure destinations (217 centres e.g. Central London, Central Manchester, Southampton, Norwich, Oxford, Horsham, Herford, Nantwich, Wells, Stirling)
The top shopping destinations with largest catchments offering all types of retail and services including large proportion of anchor stores, premium, mass and value retailers. These are the top regional city centres and major sub-regional centres but also the more affluent market towns with premium retail and leisure offer (most of which are located in southern England). Very high diversity of both retail and services, with particularly good representation of fashion retailers including premium brands and department stores, furniture stores, jewellers, health & beauty salons and fitness centres. Good convenience retail offer with numerous convenience stores, some supermarkets and wine and spirits stores. Very strong representation of various leisure units including many national chain restaurants (Italian, Indian, Chinese, British, American), take away outlets, bars, pubs and coffee shops. Also high on consumer services such as banks, travel and estate & letting agents. Higher quality accommodation more 3-4 star hotels. Relatively low average vacancy rate.

3.2 Mass market & value retail large centres (193 centres e.g. Luton, Ilford, Hastings, Southend, Boston, Crewe, St. Helens, Blackpool, Bradford, Falkirk)
Major semi-regional centres and less affluent market towns serving slightly smaller and less affluent catchments than cluster 3.1. They offer broad retail and service offer tailored to a more value oriented customer as the catchments are on average less affluent and are characterised by higher unemployment rate. As such there is smaller share of anchor stores, upmarket fashion retailers, but also national coffee chains or restaurants. The proportion of restaurants is half of that of premium destinations and most popular include Indian, Italian, and Chinese. Instead, the proportion of discount stores, betting shops, charity shops and fast food outlets is higher. Also grocery retailers, household goods and electrical appliances stores are more popular than in cluster 3.1. Other popular occupiers include banks, estate agents and mobile phone stores. These centres have higher average vacancy rate.

3.3 Affluent/premium retail destinations (36 centres e.g. Trafford Centre, Cheshire Oaks, Bicester Village, Whitely Village, Kensington High Street, Knightsbridge)
Relatively small number of centres with more affluent catchments, typically located in the vicinity of larger urban areas. Majority occupiers are multiple retailers including both large chains such as department stores and small multiples such as fashion boutiques. They often specialise in more premium clothing and footwear goods, beauty products, gifts and speciality goods such as fashion accessories, jewellers, souvenir shops, interior designers, shirt makers or decorative glass sellers. Can also be home to newsagents and numerous restaurants (most popular are Iranian, Afghan, Mauritian and Vietnamese) and coffee shops predominantly large national chains. Very low presence of all types of value retailers, charity shops, betting shops, mobile phone shops and DIY & household goods. Also the share of fitness centres, household or consumer services and public houses is very low. Low average vacancy rate.

Cluster 4: Primary food and secondary comparison destinations (559 centres)

Predominantly larger district centres, suburban and coastal towns. They are relatively diverse and usually comprise a good mix of multiple and independent retailers and service providers. Typically, they are the main district centres in a particular urban area being the hubs for food retailing and secondary comparison goods. These centres are often home to various supermarkets, value brand and mass retailers such as house goods, chemists, charity shops. Also household services, fitness centres, cafes, pubic houses and fast food outlets are relatively popular occupiers. Catchments are of medium size and on average not very affluent, relatively high vacancy rate.

4.1 Smaller vibrant urban destinations (179 centres; e.g. Cosham, Portsmouth; Kemp Town, Brighton; King's Cross, London; Kidlington, Oxford; Acton, London; Harborne, Birmingham;)
Predominantly located in urban densely populated areas, smaller and have on average slightly less affluent catchments than cluster 4.2, but they are nevertheless vibrant centres with low vacancy rate. They are less important destinations for comparison shopping although some value oriented outlets may be present such as Peacocks, Home Bargains, Savers or Superdrug. More typically both the big 5 supermarkets and/or hard discounters will be the key anchor stores. Popular with chemists, CTNs, wine & spirit stores and computer shops. Strong hubs for various services too such as hairdressing, health and beauty, fitness centres, mostly

independent coffee shops, local pubs, take away outlets, independent restaurants (most popular are Indian, Italian and Vietnamese).

Low proportion of anchor stores and DIY and household goods stores. Also fewer fashion stores, mobile phone shops, discount stores or pawnbrokers and business services such as recruitment services, estate or travel agents.

4.2 More affluent district destinations (243 centres; e.g. Allerton Rd, Liverpool; Knutsford; Whitby; Bedminster, Bristol; Harpenden; Clapham Junction; Hove)

These are major district centres in larger urban areas with more affluent catchments and some attractive market towns. They comprise a good share of independent retailers and they are characterised by high diversity and relatively high vacancy rate. They are popular with mass brands and value oriented comparison goods in particular household goods and fashion but also they are home to a large number of charity & second hand shops and booksellers. They also may be home to some premium brands. In terms of convenience retail these centres are dominated by convenience stores, delicatessen, grocers and wine & spirit stores. Popular location for various service providers such as hairdressing, health & beauty salons, dry cleaners and consumer and business services including banks and estate agents. Strong hubs for local leisure with a wide selection of restaurants (most popular are Indian, Italian, Vietnamese), but also pubs, chain fast food outlets, coffee shops and tea rooms both corporate and independent. Noticeable presence of art galleries, art dealers and fitness centres.

4.3 Urban value destinations (137 centres; e.g. Dunstable; Merthyl Tydfil; Dewsbury; South Shields; King's Heath, Birmingham; North End, Portsmouth)

It's a mixture of suburban/urban district centres and market towns often in less affluent areas such as Welsh Valleys, post-mining towns of the North West, Central Belt in Scotland or East and North London. The crime density, unemployment and vacancy rates are higher. These centres are slightly less diverse and are popular locations for comparison shopping with a number of anchor stores comprising usually both value and mass brands such as clothing, electrical appliances and household goods. High number of pawnbrokers, nail salons, opticians and mobile phone shops. Other retailers that are more popular include discount supermarkets, bakers, tobacconists, card shops and charity shops. They also provide strong convenience goods offer with the major supermarkets present. Some financial and consumer services present too such as banks, recruitment or estate agents. There are fewer restaurants (especially French, British or Japanese) or coffee shops, however there is high proportion of fast food outlets and local pubs.

These centres have very low proportion of premium brands and fitness centres.

Cluster 5: Traditional high streets & market towns (642 centres)

Typically, smaller high streets located in suburban and rural areas, diverse but specialising in convenience goods and household services. Grocery shopping with traditional butchers and bakers and consumer services destinations facing less competition from other centres. High in local retail diversity, especially convenience goods, typically anchored by a supermarket, also popular with charity shops, cafes and chemists. Low unemployment and crime, med income, vacancy rate below the national average.

5.1 Traditional high streets of rural Britain
(108 centres; e.g. Tenby, Glastonbury, Buckingham, Rye, Settle, Royston, Windermere)
These are typically market towns in more rural and often touristy areas away from the major urban areas (no presence in any major urban area). Larger catchments, less competition, low population density and very low unemployment rate. They are the most diverse centres in cluster 5 in terms of both retail and services. There is a very high share of independent retailers but they are also home to some comparison goods multiples. local consumer services including banks, estate agents and health & beauty shops. This centres are also popular with independent comparison goods retailers such as fashion, footwear, gift, sport goods & hobbies shops, books, craft and art stores, jewellers and charity shops. Also higher proportion of bakers, butchers, confectioners and health food product sellers. In addition, the number of accommodation units is substantially higher than in any other subgroup of cluster 5. Strong leisure offer, especially in terms of independent cafe & tea rooms, twice as many pubs as in other subclusters, also popular with bars, independent restaurants and brasseries (Indian, British and Chinese). Lower proportion of value brands, fitness centres but slightly higher vacancy rate compared to other centres in cluster 5, although slightly below the national average.

5.2 Suburban & market town high streets (210 centres e.g Ashford, Surrey; Shoram by Sea; Hythe, Hampshire; Westbury on Trym, Bristol; Neston, Cheshire; Woodstock, Oxfordshire)
Mainly suburban centres and market towns, small and located in the commuter belts around the major cities. Slightly smaller, less diverse, relatively high proportion of independent retailers but there is a good representation of multiple stores predominantly symbol convenience stores, mid-size supermarkets, chemists and most of all chain charity shops. Popular also with consumer and business services such as banks, post offices, estate agents and health and beauty shops (hairdressers, barbers and opticians), also printers and antique dealers are common in these high streets. High number of entertainment units of which bookmakers are the most popular. In terms of leisure a relatively good representation of traditional pubs, cafes, and independent restaurants, lower proportion of takeaway outlets.
Overall, these centres have fewer comparison goods retailers, particularly DIY and household goods stores. Low vacancy rate.

5.3 Diverse & affluent urban leisure destinations
(165 centres e.g. Clifton, Bristol; Moseley, Birmingham; Battersea, London; Hale, Manchester; Ecclessal Rd, Sheffield, Highgate, London; Esher, Surrey)
Predominantly urban traditional high streets within the major cities and larger towns with more affluent catchments. Catchments densely populated with large number of competitors. Diverse centres with higher proportion of household goods, also fashion boutiques and speciality shops such as antique or furniture stores. Popular convenience destinations with convenience stores, grocers, delicatessen and wine & spirits stores. Strong leisure offer especially independent fast food outlets, independent cafes & tea rooms and restaurants (Indian, Italian, Turkish, Japanese) - highest number of these units within cluster 5. In terms of services, there are high proportion of health and beauty salons, dry cleaners and there is good representation of letting & estate agents. Lower proportion of comparison goods retailers, value brands and health & beauty shops.

5.4 Indie & value oriented high streets (159 centres e.g. New Ferry, Wirral, Lower Irlam, Manchester; Hyson Green, Nottingham; Burry Rd, Luton; Barking Rd, London; Birstall, West Yorkshire)

Mainly urban and suburban small high streets with slightly less affluent catchments and higher proportion of ethnic diversity/disadvantaged population. Centres with diverse retail offer with largest proportion of independent retailers often value oriented. They typically contain higher proportion of household goods retailers but also discount stores and are strong local hubs of consumer services. Large number of convenience stores, grocers; also DIY stores, ethnic retailers and fitness centres are popular.

Leisure offer largely consists of fast food & takeaway outlets, and independent ethnic restaurants (African, Pizzerias, Turkish) however their proportion is slightly lower.

Although hairdressers are popular, overall there is smaller proportion of health & beauty shops, wine & spirit stores, comparison goods retailers and multiple retailers.

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Table 1 shows characteristics of the broad clusters organised around the four domains that were examined: composition, diversity, function and economic health. There is further variation across the sub-clusters which is not captured in this table.

Also there is an element of scale that hasn't been captured but is clearly visible in Cluster 3, especially 3.1 – top shopping destinations. There is a number of smaller town centres especially in the more affluent parts of the country such as Reigate, Petersfield, Market Harborough or Witney that are included in that cluster. This is mainly because they have similar proportions of various retailers, brands (premium, mass, value) or multiple vs. independent split as the much grander destinations such as Liverpool, Glasgow, Southampton or Norwich. This has been exacerbated by incorporating local scale when examining various proportions of retail types, their diversity or existing competition. Perhaps disaggregating this sub-cluster by size would be of further benefit.

Table 1: General characteristics of the broad clusters

Cluster	Composition	Diversity	Function	Economic health
1	hospitality services	low	local leisure and hospitality services	average
2	comparison hubs	low	general non-food shopping	good
3	retail/leisure hubs	very high	comprehensive shopping and leisure	average
4	Convenience/secondary comparison hubs	high	Food and local leisure	below average
5	Convenience shopping and consumer services	average	Food, specialists, leisure	above average