

WORKING PAPER 379

THE EXPANSION OF SERVICE OUTLETS ACROSS THE CITY

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### Overview

Of all the recent changes in the retail environment, one of the most fascinating has been the rapid growth of quasi-retail or service outlets in our shopping centres. Keith Waterhouse, in a recent newspaper column, provides a neat summary of how the changes appear to someone outside the retailing or planning profession; "Look up an old Kelly's directory of only twenty or thirty years ago and you'll be astonished how much the old place (the High Street) has changed - far more than you realised. Where there was once a solitary travel agents, if that, there are now half a dozen. The Misses Tonks' secretarial agency has blossomed out into half a dozen temps' bureaux; the old Lyon's teashop into half a dozen junk-food dispensaries; the old circulating library into half a dozen video centres. And still room has to be found for the betting shops, the bureaux de change, the space invaders arcades, the do-it-yourself shops - and whatever comes next in the passing show of passing trade". (p.10, 1983).

Whilst many authors have commented upon the rise of service outlets on our High Streets few studies have approached the subject in any depth. The unit of Retail Planning and Information (URPI) documented the general rise in their 1977 Information Brief and have since supplemented this with various reports on specific aspects of the growth of services (eg. URPI, 1979, 1980a, 1980b, 1980c). However there seems to be three important reasons for considering the topic in far greater detail. Firstly the URPI work has been based on centres contained in 'Newman's Annual Retail Directory' which are all of large size (the minimum threshold of entry being fifty outlets). No author has yet investigated the changes in centres of less than fifty outlets. Secondly the URPI work has been based on a nationwide coverage of centres and no attention has been focussed on a detailed case-study for a particular city or region. Thirdly the time seems ripe to update and draw attention to the significant changes since 1977, the last five years or so having proved to be the most dynamic as far as service outlet infiltration.

Thus in this study we will investigate the rise of services across the city of Leeds since 1960, focussing on some thirty-one centres defined in this area, and concentrating specifically on 1961, 1971 and 1982 but expanding on these key years where appropriate. The size of centre chosen range from the City Centre with its total number of shops today around nine hundred to the smaller centres of only fifteen to twenty outlets. The centres are

identified in Appendix A, but to help the clarity of this paper, the character of centres referred to will be briefly mentioned where appropriate in the text. Those activities labelled as services rather than traditionally retail are also appended (Appendix B). In Section (A) a general overview of the rise of service outlets in Leeds will be presented followed in Sections (B) and (C) by an analysis of the rise of specific service functions.

(A) The rise of service outlets

The URPI survey of 1977 provides us with a neat overview of national trends since 1965. Figure 1 illustrates the steady rise of service outlets in these larger centres throughout the late 1960s and early 1970s. To make a comparison with national trends, the rise of services for Leeds as a whole and then for selected centres are shown in Figure 2. These centres were chosen to give a fair representation of both size and location.

Bearing in mind the slight discrepancy between the actual years studied, the overall Leeds total for 1961 and 1971 does not differ too greatly from the URPI national figures although Leeds does seem to be slightly higher. More interesting is the rapid post-1971 increase for Leeds which is clearly not reflected in the URPI figures up to 1976. This again emphasises the importance of the last five years in terms of substantial change in the High Street or shopping centres.

Figure 1. The growth in retail and service outlets 1965-1976  
(from URPI Survey, 1977)

	<u>% Retail</u>	<u>% Services</u>
1965	80.1	19.9
1969	78.9	21.1
1973	77.2	22.8
1976	76.6	23.4

Figure 2. The rise of services in Leeds (total) and for selected centres

<u>Centre</u>	<u>% of service outlets</u>	
Leeds (total)	1961	18.78
	1971	24.78
	1982	34.57
City Centre	1961	21.42
	1971	28.25
	1982	41.18
Crossgates	1961	16.12
	1971	26.53
	1982	32.02
Moortown	1961	22.58
	1971	31.42
	1982	51.43
Hollin Park	1961	18.18
	1971	18.75
	1982	33.33
Armley	1961	17.10
	1971	20.58
	1982	31.13
Middleton	1961	13.33
	1971	16.66
	1982	26.08
Woodsley Road	1961	10.00
	1971	16.66
	1982	19.04
Hyde Park	1961	6.80
	1971	21.05
	1982	18.42

It is worth looking more closely at the rise of service outlets in particular centres, because, as Figure 2 shows, there is wide variation in growth rates between the various centres.

The City Centre has, throughout the time period considered, always been above the Leeds average and to a certain extent this is not surprising given that a large number of cafes, restaurants and financial institutions have always been synonymous with the City Centre and coupled with the general rise of newer services. What is interesting however, is the spatial representation of service outlets across the City Centre with the pattern of 1982 serving as a good illustration. By 1982 the heart of retailing activity in Leeds centre can be identified around a roughly rectangular area incorporating Bond Street (with its new indoor centre), Albion Street, Commercial Street, Lands Lane and Briggate, bounded by Boar Lane to the South and the Headrow

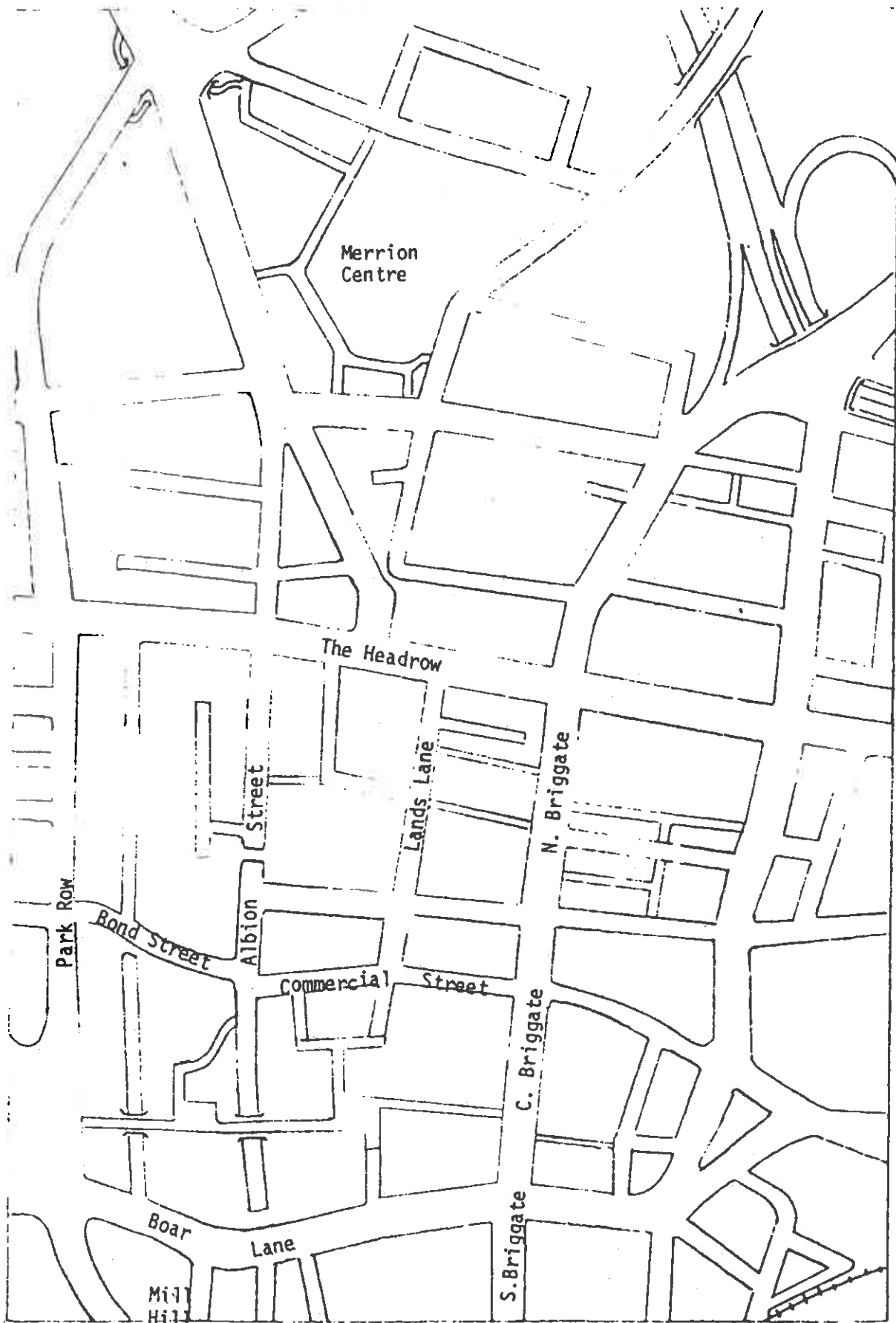


Figure 3.      The retail heart of Leeds City

to the North (see Figure 3). Within this rectangular area the number of service outlets remains remarkably small. Figure 4 illustrates this with reference to Commercial Street.

Figure 4. Service outlets in the heart of the central shopping area - Commercial Street

1961 retail functions = 25, services = 3 or (10.71%)  
1971 retail functions = 26, services = 5 or (16.12%)  
1982 retail functions = 27, services = 6 (18.18%)  
(vacant or unknown properties not included)

Thus it is apparent that the central core area is still dominated by department stores, jewellers, boutiques, shoe shops, etc. Away from this retail core area the number of service outlets greatly increases. It is well documented (eg. see Bennison and Davies 1978, 1980), that whenever such a polarization towards such a location occurs then so-called 'fringe areas' begin to develop where perhaps pedestrian flows are greatly reduced, and key retail multiples dwindle in numbers. Boar Lane and its southern vicinity is beginning to fall into just such a category. Its apparent decline is shown not only in the growing number of fancy goods or discount stores but also in the larger number of cafes, restaurants and take-aways. Similarly Mill Hill (see Figure 3) now only comprises of an insurance office, an employment agency, a pizza restaurant, an amusement arcade, a bookmakers, two public houses and a record shop having recently boasted furniture, D-I-Y and electrical shops. This division between core and fringe areas is no less prominent than on Briggate. As Figure 3 shows Briggate is one of two central north-south focal routes running through the city centre. North and Central Briggate remain within the retail heart area and once again the number of service outlets is very low, only 11% of the overall total. However Southern Briggate seems to be fast approaching something of a retail wilderness, with a large number of vacant properties and a larger number still having met the bulldozer; here 39% of its remaining outlets are in the hands of service functions.

The small percentage of service outlets in the retail heart of Leeds centre are generally made up of financial institutions, cafes/restaurants and the growing number of agencies and bureaux. The encroachment of financial institutions has not as yet been as forceful as in other urban areas and this may well be due to planning restrictions as well as a lack

of suitable vacant properties. Indeed Fernie and Carrick (1982) note,

"Leeds City Council are more sympathetic to encroachment of restaurants, cafes and public houses in prime central shopping areas than they are to building societies or estate agents which they consider more acceptable in secondary shopping areas". (p.14).

Apart from planning restrictions the relative lack of service outlets in prime retail areas is also a function of the very high rents these sites afford. Thus as retailers move out of our so-called fringe areas entrepreneurs often see the opportunity for restaurants, cafes and leisure services in areas which can still attract a certain amount of passing trade but where rent values are considerably lower. Those that can afford the higher rent prime sites are, of course, the large multiple financial agents and it may well be that Leeds City Council will have a hard fight in the future to keep levels of occupancy down. Albion Street (see Figure 3) is already beginning to soak up the 'overflow' from more traditional financial areas of the city such as Park Row and East Parade (see Figure 3 and also Section 8).

Outside the city centre the rise of service outlets is far more closely connected with the rise of financial institutions and one might expect the more affluent suburban areas to have higher rates of service occupancy (see for example Section 8 for the location policies of building societies and estate agents). A brief examination of the remaining centres in Figure 2 illustrates this point.

Crossgates is one of the largest suburban centres and consequently retains a larger number of purely retail occupations such as boutiques and shoe shops, etc., and the level of service occupation remains fairly close to the Leeds average. The layout of service outlets within Crossgates raises an interesting planning problem. Planners and shopkeepers have always tended to feel that too many service outlets detract from the overall attraction of a particular shopping centre and place unfair pressure on local traders in terms of the rent they can afford. (A theme echoed widely at the URPI workshop convened in 1979). It is extremely difficult to measure the impact of a large number of service outlets without detailed questionnaires of both consumers and retailers, yet many planning authorities have still tried to restrict their growth normally with the aid of the Use Classes Act which requires planning permission to be sought for retail to service

(or office) change (see Stocks (1979)). In Crossgates the Planning Authorities together with the development company have been successful at keeping service outlets from the Arndale Centre, the main under-cover pedestrian precinct. However this has resulted in a proliferation of service activities outside the main precinct so much so that the large 'magnet' stores of Woolworths and Safeways are now sandwiched between three banks, two building societies, a laundrette, a gas showroom, a restaurant and a bookmakers.

Moortown (see Appendix A) lies to the north of Leeds and is in an area of general affluence and, with that, contains a large Jewish population. The number of service outlets has always been high in Moortown but currently over 50% of its outlets are thus occupied. This is by far the highest percentage for any of the centres investigated, with a high number of financial institutions, travel agents and dry cleaners.

Hollin Park is an interesting centre in that the expansion of services has occurred far more recently. Figure 2 illustrates the phenomenal growth since 1971. This reflects the ever increasing tendency for smaller centres to benefit from the branch expansion programmes of many of the multiple service concerns. Again Hollin Park lies in a fairly prosperous area.

At the other end of the scale centres such as Armley, Middleton and Woodsley Road have tended to attract far less service outlets (see Figure 2). Armley though, remains close to the Leeds average being a very large suburban centre and hence able to draw upon a large pedestrian flow. Middleton lies to the south of Leeds (see Appendix A) and, because of its generally low levels of affluence and high proportion of council houses, has been seen as a poor investment by the major service institutions. Woodsley Road also has particularly low levels of service outlets, lying as it does in an inner-city low income area with a large Asian community.

The final centre referred to in Figure 2 is Hyde Park which is interesting because it is the only centre in the study to have experienced a decline in the number of service outlets. Hyde Park has been declining as a centre for some time due to the growth of facilities at nearby Headingley (see Appendix A) and its close proximity, on numerous bus routes, to the city centre. The general decline of Hyde Park as a centre and the presence of a large student population has resulted in a crop of antique and second-hand furniture stores, bookshops and sport and leisure goods outlets.



Clearly then, the location of a particular centre in respect to the affluence of the host population, plays a vital role in its ability to attract service outlets. Before analysing the rise of particular services in more detail it is worth looking more closely at the overall pattern of change.

URPI (1979) identified the major growth areas in service outlets and some of the results of this national survey are illustrated in Figure 5 below.

Figure 5. Percentage change in the number of service outlets between 1965 and 1976

Employment agencies	+	833%
Take-aways	+	700%
Building societies	+	283%
Travel agents	+	252%
Betting offices	+	164%
Insurance and money agents	+	118%
Cafes and restaurants	+	50%
Estate agents	+	48%
Opticians	+	3.5%
Launderettes	-	10%
Shoe repairers	-	30%
Dry cleaners	-	45%

(abstracted from URPI (1979))

It is apparent from these figures that the largest growth areas have been the financial sectors and the take-away/eating out food sectors. Figure 6a plots the fortunes of numerous functions in Leeds since 1961. Thus a butcher's shop was present in thirty-one centres in 1961 and so on. Figure 6a clearly supports the URPI findings, showing the success of bookmakers, building societies, opticians and estate agents. Employment agencies, video hire outlets, film processors and travel agents have also experienced phenomenal growth, in percentage terms, although are not as widespread as yet. For example, since only 1979, film processors have increased by 900% and video hire outlets by 1400% (see Section C). It is also interesting that launderettes and dry cleaners have not declined in importance since 1961 unlike the centres examined by URPI. This may simply be due to the smaller size of many of the centres chosen for our analysis.

It is clear from Figure 6a that the phenomenal growth of service outlets has not been matched by non-services or purely retail functions. The exceptions to this have been supermarkets, frozen food outlets and car accessories. Also evident is the rapid decline of more traditional

high street functions such as drapers (soft furnishings), hardware stores, sweets/tobacco, fishmongers and general grocers. Butchers, bakers and greengrocers (fruit and veg. in Figure 6a) have managed to retain their importance, satisfying daily demands for perishable goods, but the demise of the independent grocer is particularly apparent, with the arrival of first the supermarket and then the superstore. Where the small independent grocer has survived it is often with the help of voluntary group organizations (Spar, Mace, etc.) or through the attraction of offering an extra service such as free home delivery (eg. Groococks in Headingley).

The decline in the number of grocers since 1961 has been plotted in spatial terms in Figure 6b (these computer plots will be used throughout the paper). The shopping centres have been located exactly on a square zoning grid and the peaks represent the number of outlets for a particular activity in a particular location. Obviously, the higher the peak the more outlets present. Figure 6b then shows how the number of grocers has declined and how that decline is spatially represented. For further analysis of non service outlets see Clarke and Macgill (1983).

Having examined the general rise of service outlets it is now appropriate to investigate the rise of certain services in more detail.

## (B) The rise of financial institutions

### (i) Building societies

Figures 5 and 6, in Section A, showed how much building societies have grown in importance on the High Street and indeed, in terms of actual number of outlets, building societies have shown the greatest growth. (Here outlets refers to both full branch outlets and agencies within solicitors, insurance, estate agents, etc.).

URPI (1980c) have put forward three basic reasons to account for recent building society expansion and growth. Firstly, there has been a rise of personal disposable income since 1960 providing more money to save. High inflation rates during the 1970s provided incentive to borrow, especially for long term assets such as houses, and for those who wishes to save, to invest in schemes which kept apace with inflation. Bradley (1979) notes the beauty of building society saving schemes offering relatively high interest

Figure 6a. The changing nature of functions in the shopping centres of Leeds, 1961-1982

<u>1961</u>	<u>1971</u>	<u>1982</u>
Butcher (31)	Baker (31)	Baker (31)
Baker (30)	Hair Salon (31)	Hair Salon (30)
Fruit and veg. (30)	Butcher (29)	Chemist (30)
Hair Salon (30)	Chemist (29)	Butcher (29)
Grocer (28)	Fruit and veg. (28)	Bookmakers (28)
Chemist (28)	Drapery (26)	Fruit and veg. (26)
Bank (23)	Bank (25)	Building society (26)
Drapery (23)	Grocer (24)	Bank (25)
Hardware (22)	Bookmakers (22)	Fish and chips (23)
Sweets/tobacco (22)	Laundrette (21)	Opticians (23)
Fish and chips (19)	Fish and chips (21)	Dry cleaners (19)
Bookmakers (18)	Hardware (20)	Laundrette (18)
Dry cleaners (17)	Dry cleaners (18)	Chinese take-away (17)
Plumbers (16)	Opticians (18)	Estate agents (16)
Shoe shop (15)	Sweets/tobacco (17)	Hardware (14)
Laundrette (13)	Shoe shop (196)	Jewellers (14)
Opticians (12)	Supermarket (14)	Travel agent (14)
Co-ops (11)	(excluding Co-ops)	Frozen foods (14)
Cafe (10)	Cafe (13)	Restaurant (13)
Jewellers (10)	Jewellers (13)	Drapery (13)
Assurance/Insurance (9)	Plumbers (13)	Shoe shop (13)
Shoe repairs (9)	Co-ops (11)	Supermarket (13)
Fishmongers (7)	Restaurant (11)	Grocer (12)
Building society (6)	Shoe repairs (11)	Insurance/Assurance (12)
Estate agent (6)	Insurance/Assurance (10)	Car accessories (11)
Car accessories (5)	Frozen foods (10)	Fast food (10)
T.V. rental (5)	Building Society (9)	Video hire (10)
Frozen foods (5)	Car accessories (9)	Co-ops (10)
Restaurant (3)	T.V. rental (9)	T.V. rental (9)
Travel agent (3)	Chinese take-away (9)	Cafe (8)
Supermarkets (1)	Estate agent (8)	Sweets/tobacco (7)
(excluding Co-ops)	Fishmongers (7)	Shoe repairs (6)
	Travel agent (6)	Plumbers (6)
	Fast food (5)	Film processors (5)
	Employment agency (1)	Job centre (5)
		Fishmongers (2)

(abstracted from Clarke and Macgill (1983))

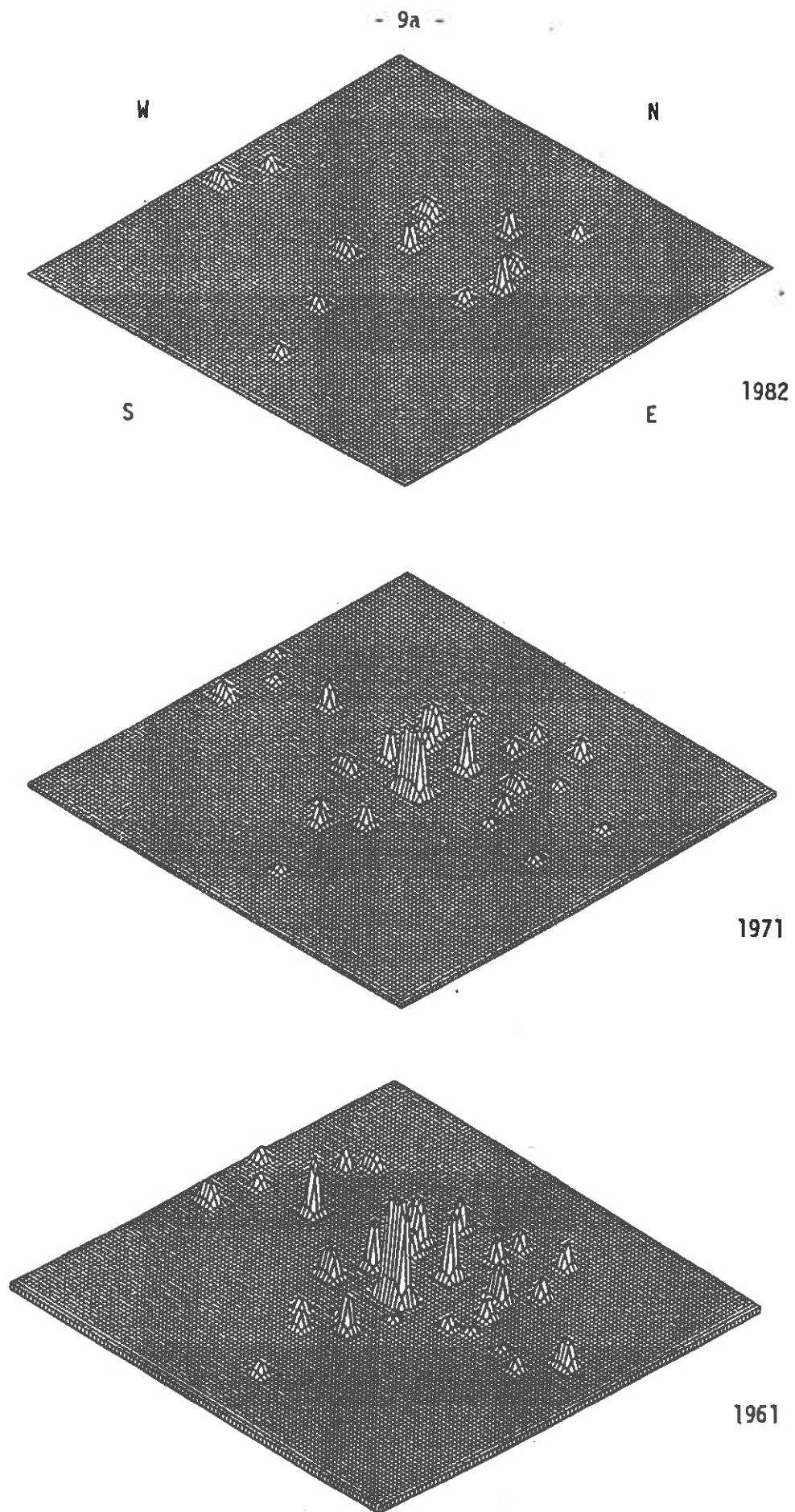


Figure 6b.    The decline in the number of traditional grocers 1961-1982

rates with greater security and simple investments that can possibly be linked to future home loans. Indeed the ease with which money can be withdrawn and deposited has led to Samuel's (1979) reference to the "small man's bank". Secondly the vast programme of building society advertising campaigns led many of the major companies to become household names in a very short period of time, and thirdly, the policy of branch expansion, which is the main purpose of this paper, has led to greater ease of access for potential and actual customers. Boleat (1978) comments,

"Clearly building societies have been achieving a far greater market penetration and this must be some vindication of the policy of branch expansion". (p.10).

A combination of these factors has thus led to an increase in households short term financial assets held by building societies, increasing in fact from 24% in 1966 to 39% in 1975 and to approximately 50% today.

Having briefly looked at the reasons for building society growth we now need to ask the questions, why do societies demand high street locations and what criteria do they use for selecting particular shopping centres? The major reason for high street locations has been the increased dependence within the societies upon over-the-counter trade, particularly in suburban branches. Indeed URPI (1980) estimated that in suburban branches, direct over-the-counter business would account for 70-80% of business. This dependence upon over-the-counter trade leads the building societies to seek prime retail positions, close to major traders and at good interceptor positions where pedestrian flows will be at a maximum. The argument simply runs that, like their competitors the major clearing banks, societies cannot expect people to visit branches in inaccessible places. Similarly the societies are equally adamant that ground floor premises should always be used within the prime retail centres. Bradley (1979) explains,

"Most people would be prepared to go to the third floor back office to obtain a mortgage but in competing for savings and investment societies need ground floor premises like our competitors".

Fernie and Carrick (1982) also note the importance of window displays at ground floor level to the success of a particular branch.

The locational policies of each building society will of course vary but some general trends are discernable. URPI (1980) note that there have been two distinct development strategies. The first strategy involves the notion of national coverage and is the primary aim of the top UK building societies. Of the top five societies (including Leeds Permanent) interviewed by URPI, all stressed that they wanted to be represented in as many of the major centres nationwide as possible, and as they became saturated, to expand in larger suburban areas. Davies and Davies (1980) quote two building societies who adopt this national approach,

"We firmly believe all members want and expect to find our offices in convenient and well sited locations in most towns of the country" (Abbey National Building Society, Chairman, April 1979).

"There is no doubt that the demand for the Society's services fully justifies the opening of further branch offices in carefully selected towns and much of the success of the Society in recent years is attributable to the policy of branch and agency development throughout the country" (Cheltenham and Gloucester Building Society, President's Report for 1978).

The second strategy is generally more favoured by smaller companies and this involves regional or local saturation policies. That is, to locate branches where they will obtain saturation representation in areas of traditional strength. The Leeds and Holbeck Society is particularly important in this respect. Indeed Woollin (1983) explains,

"Leeds is our home city where we are well known and from the point of view of advertising there are advantages in having a concentration of branches rather than the same number of branches thinly distributed around the country. Also, branches located in suburban areas are generally easier to control and administer and therefore cheaper. As we are a Leeds based organization it is logical to devote a large part of our resources to branch development in the Leeds area. In this way we are able to satisfy the requirements of our members who dislike travelling to the city centre and also attract business from the public at large for the same reason. We place a great deal of importance on servicing our existing customer." (Leeds and Holbeck Building Society, private communication from the General Manager).

Whichever of the strategies societies favour there are certain general locations (whether they be large or small) which are attractive in terms of investment in capital. Most obviously societies first look to areas of

high status where there are high proportions of the population which could afford to take on a mortgage and buy their own houses. BMRB (1979) estimated that 70% of building society investors were also home owners, and that the relative investment penetration levels were above average in the top two social classes, AB and C1. The URPI (1980) study also confirmed that all societies they interviewed pointed to the importance of the presence of home owners and young people. A second major factor which can affect investment in a particular centre is the amount of competition or the number of building societies already present. This is difficult to quantify in that larger more affluent areas are far more capable of supporting a large number of societies whereas many smaller centres can only effectively support one or two branches. This will be seen in more detail for Leeds shortly.

Given these general rules each society will also have an internal set of rules or procedures to meet before deciding on investment. For example Ransome (1983) briefly notes the procedure of the Leeds Permanent,

"The decision process leading to buying prospective branch premises is exhaustive and culminates in a decision whether to buy or not to buy by our Board of Directors. Amongst the information they will require is a reasonable base of investors already within the catchment area, demographic information and building society trends. Most of this information is then run through a computer and a printout is received which will show an assessment of costs and receipts for the particular premises. This information is used, together with the knowledge and experience of a senior member of staff, to decide, initially, upon the Society's prospects in that area". (Leeds Permanent Building Society, private communication with the Operations Officer).

With the above as background a consideration can now be made of the rise of building society branches in Leeds. Figures 7a and 7b indicate the rapid expansion of building society branches in Leeds since 1961.

Figure 7b. The growth of building societies branches in Leeds 1961-1982

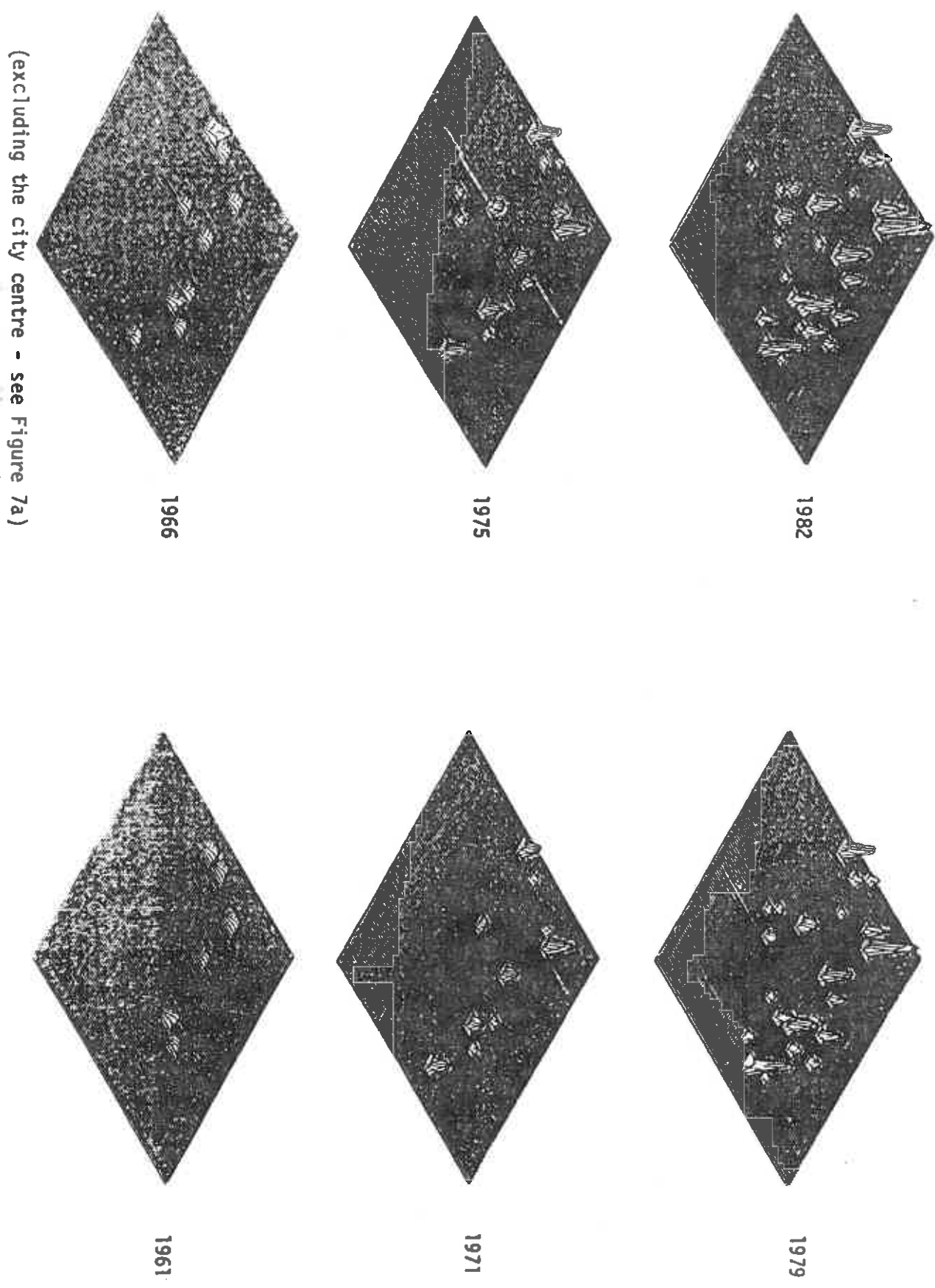




Figure 7a. Building society branch expansion in Leeds, 1961-1982

	<u>City centre branches</u>	<u>Suburban branches</u>
1961	6	7
1966	7	11
1971	9	18
1975	19	29
1979	27	70
1982	31	85

From Figure 7a the expansion since 1975 is clearly striking! Figure 7b plots the spatial expansion of building society branches since 1961. Whilst the number of branches have increased rapidly the growth has been far from uniform across the city as a whole. In the city centre branch concentration has occurred in an area between the main office sector to the west and the main retail sectors of the centre. Thus a clustering effect has emerged along East Parade and Park Row and more recently along Albion Street, Bond Street, Albion Place and the Headrow (see Figure 3). Indeed by 1982, 80.6% of all city centre branches were concentrated in these areas. However, as mentioned in Section A, the expansion into the retail heart areas has already begun.

The suburban expansion of branches can be examined with particular reference to the two local firms, the Leeds Permanent and the Leeds and Holbeck Societies. Figures 8a and 8bi, 8bii (Figures 8) illustrate the rise of branch outlets in Leeds across suburbia for these two societies.

Figure 8a. The rise of local building societies in Leeds

<u>Leeds Permanent</u>	<u>Leeds and Holbeck</u>
<u>1961</u> Harehills	Oakwood, Harehills, Headingley
<u>1966</u> Additions: Pudsey	- - -
<u>1971</u> Additions: Headingley, Crossgates, Horsforth Town Street, Armley, Halton (agency)	Crossgates, Chapel Allerton
<u>1975</u> Additions: Dewsbury Road (agency)	Meanwood, Horsforth Town Street, Armley, Beeston Park, York Road, Pudsey (agency)
<u>1979</u> Additions: Harehills Lane, Hunslet, Chapel Allerton, Moortown, Bramley	Moortown, Middleton
<u>1982</u> Additions: - - -	Hollin Park, Harehills Lane, Dewsbury Road, Roundhay  (1983 - Woodsley Road)

Figure 8b(i).      The suburban expansion of the Leeds Permanent Building Society

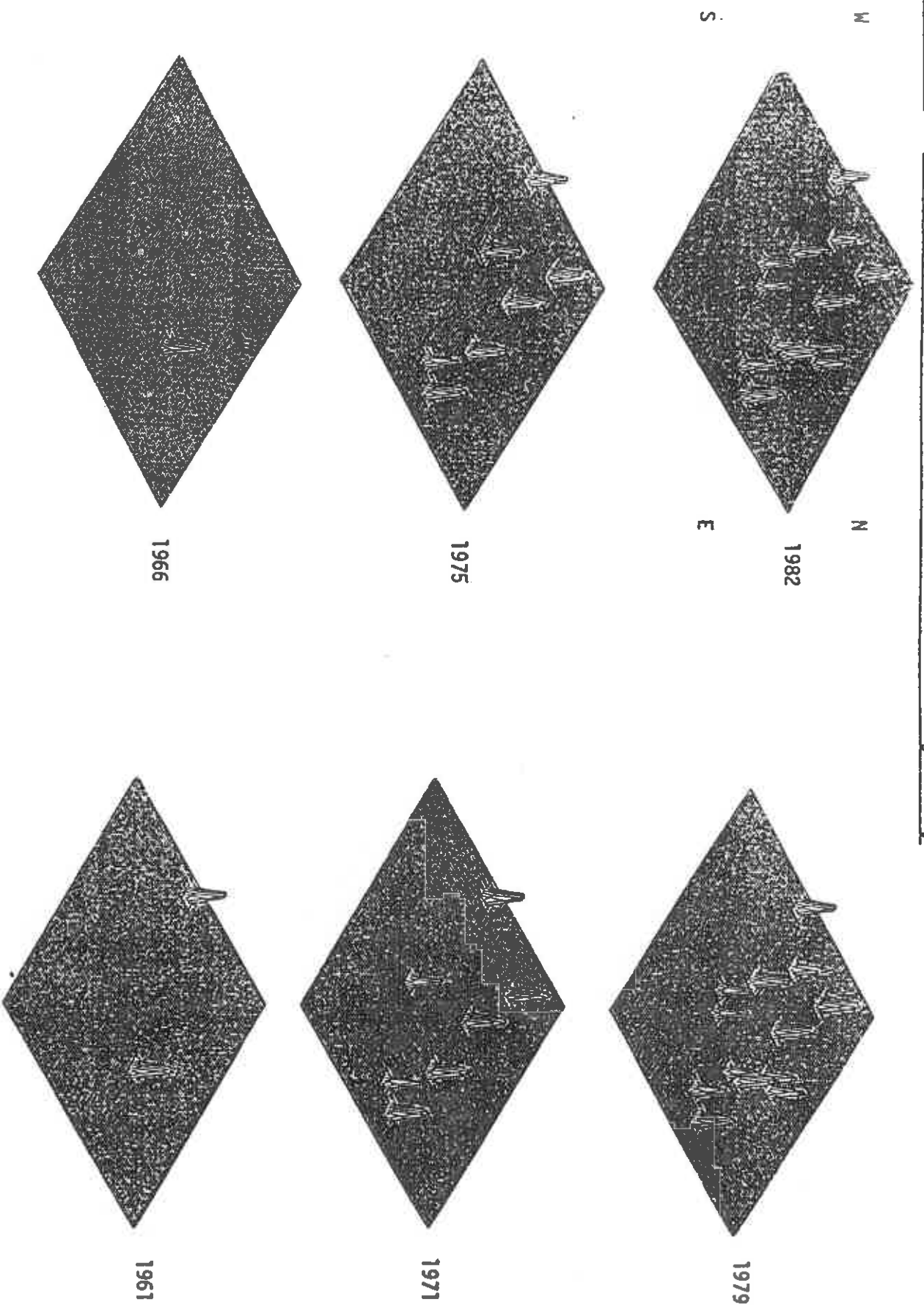
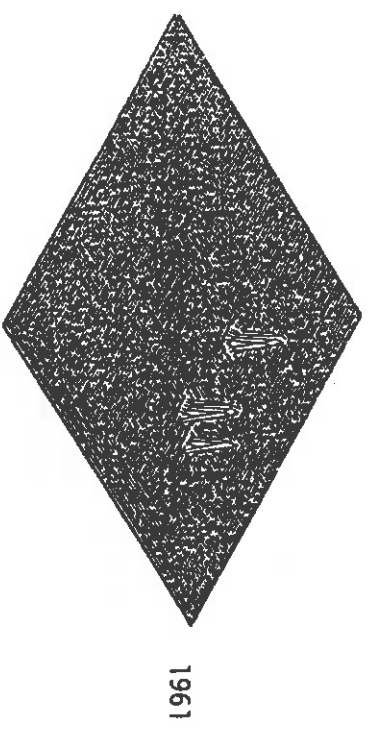
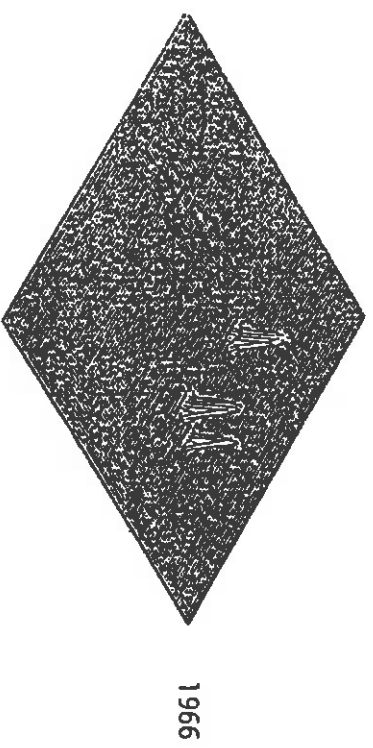
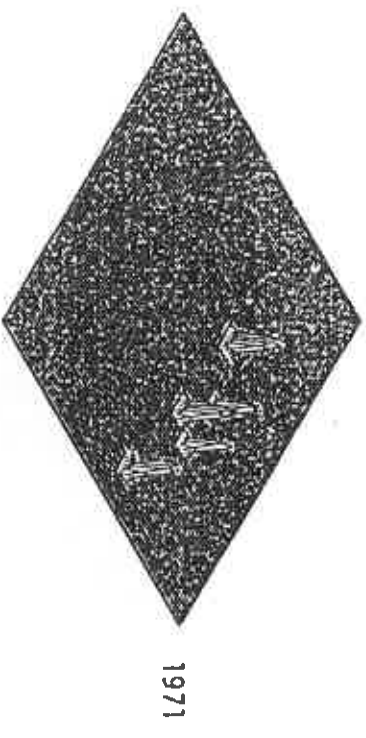
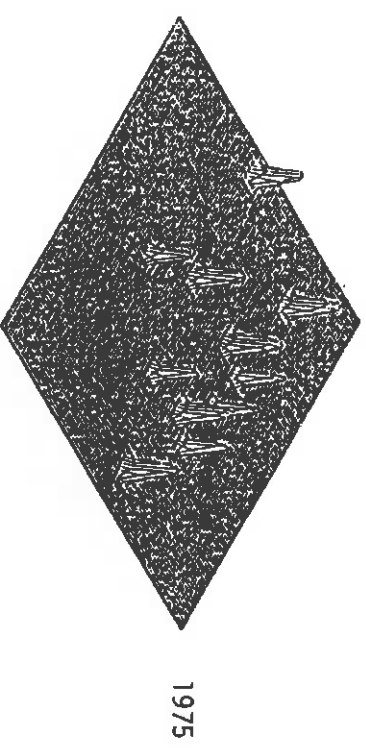
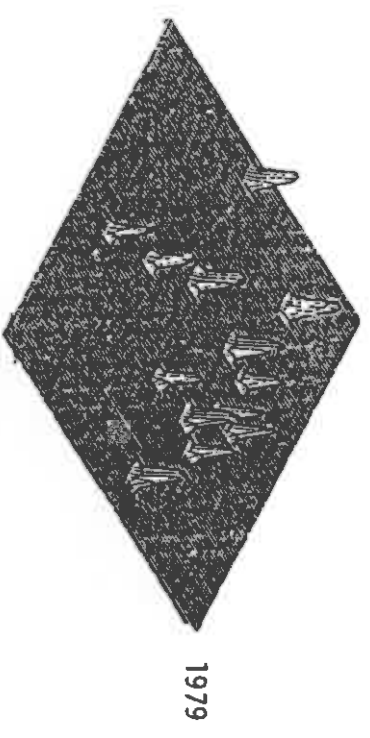
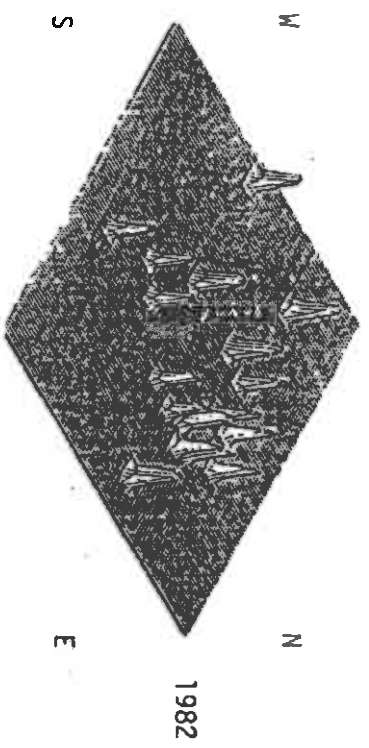


Figure 8b(ii).      The suburban expansion of the Leeds and Holbeck Building Society



The history of building society branch expansion in Leeds clearly illustrates many of the assessment techniques mentioned above. The growth of the Leeds Permanent Society seems very straightforward - that is occupancy of the largest centres first. Thus by 1971 the Leeds Permanent is represented in all the top six suburban shopping centres. The Leeds and Holbeck Society seemed to have a slower growth rate with only two new branches between 1961 and 1971. As Figure 8 shows the real growth period for the Leeds and Holbeck begins after 1971 with a substantial suburbanization policy. Thus by 1982 the two local firms have achieved a very wide coverage in terms of branch location.

Alongside the two local firms, other societies had also begun to infiltrate the Leeds savings market, although most developments were post-1971. By 1982 thirteen other societies had at least one branch in the shopping centres of Leeds. Figure 9 below shows how the Abbey National and Halifax building societies, for example, have become well established by 1982.

Figure 9. Branch location of the Abbey National and Halifax Building Societies by 1982

<u>Abbey National</u>	<u>Halifax</u>
Crossgates	Crossgates
Harehills	Harehills
Horsforth Town Street	Horsforth Town Street
Oakwood	Oakwood
Armley	Harehills Lane
Horsforth New Road Side	Dewsbury Road
Moortown	Halton
	Pudsey

Figure 9 shows the policies of the two firms have been rather different. The Abbey National society has preferred to concentrate on the more affluent northern suburbs together with its long standing branch at Armley. The Halifax however seems to have chosen a policy of 'wider coverage', in that many more points of the compass have been selected.

Generally speaking however, it can be seen from Figures 8 and 9 that the larger centres, with bigger catchment areas, and the more affluent northern suburbs, with their larger share of owner-occupation, have been more attractive to building society management. In Leeds this is thus reflected by a large concentration in areas like Horsforth, Crossgates, Oakwood and Headingley. Indeed by 1982 Horsforth had attracted nine different building societies and

Crossgates, eight. In stark contrast, areas such as Kirkstall Road and Hyde Park have yet to acquire a branch of any society. However, Woodsley Road has just acquired a branch of the Leeds and Holbeck and it will be interesting to see how this branch fares in such a low status area.

Another notable exception to the suburban expansion has been Seacroft. In 1982 Seacroft could be identified as the eighth largest centre in Leeds (based on the number of different functions it offered) yet had only one society present and no branch of the two Leeds societies. (The society present being the Leicester Building Society). Seacroft is a planned, purpose-built centre of the mid-1960s and has been managed since then by the Leeds City Planning Department. Given the dilemma facing planning authorities mentioned in Section A as regards service expansion, it is perhaps not surprising that Seacroft has few societies being the centre which has been the easiest to control, and hence the easiest to refuse planning permission for. On the other hand Seacroft is not such a high status area of Leeds, lying in close proximity to a large council housing estate, and as such may not be as attractive to the societies themselves.

In regards to planning concerns, it is interesting to examine which kind of retail functions have been most affected by the emergence of building society branches. It was mentioned in Section A that many planners and retailers have been concerned as to the impact on the small retailer yet as URPI (1980) comment,

"Although there is evidence of building societies and other businesses outbidding retail businesses for premises there is no evidence to suggest that refusing planning permission for building society use would envisage smaller retail shops to stay in business".

However, it is possible to examine which kinds of function have been replaced by building society branches. Figure 10 plots the change.

Figure 10. Percentage land-use for sites currently occupied by a building society branch for previous time period considered in the survey

Traditional retail functions	32.8%
Other service functions	20.3%
Vacant properties	20.3%
Always building society	10.9%
property non-existent	11.0%
Charity shop	3.0%
burnt out	1.7%

The most striking feature of Figure 10 is that less than one-third of properties acquired by building societies were previously traditional retail functions. Of this 32.8% a wide variety of functions were involved, with butchers, general clothes shop and electrical shops being the most affected. As Figure 10 also shows 20% of new branches were previously vacant. This is a surprisingly high figure but care must be taken with interpretation. For example, it is impossible to know how long premises were vacant for, within the time-periods considered. A shop recorded vacant in 1979 could have been vacant since 1975 or indeed could have changed hands more than once since 1975! (However Samuels (1979) also notes the possibility of premises being vacant for a long time). It is worth emphasising at this point that the current levels of vacancy in centres which have acquired building society branches are no higher than those recorded for the 1960s and early 1970s. Indeed those centres which today have high vacancy rates are Kirkstall Road and Hyde Park where no society branches are present!

Figure 10 also shows that around 20% of building society branches were formerly service outlets themselves. There is a great advantage in obtaining a site formerly owned by a service provision, because no planning permission is required, under the Use Classes Order, for a change of function. Thus former banks, bookmakers and dry cleaners are ideal locations for prospective building society branches. Although banks themselves have been remarkably stable in number since 1960 two particular branches, one in Armley and the other in Chapel Allerton, have been taken over by a building society. This has occasionally worked the other way around, as Davis and Davies (1979) note. Branch closures have been rare for building societies yet in certain centres branch re-location has occurred as a society moves towards a more central location. For example, when the Leeds Permanent moved to a more central location in Harehills, the property was taken over by the Habib Bank, who as before would then not require planning permission.

Having examined the rise of building society branches in some detail we can now look rather more briefly at the rise of other financial institutions.

#### (ii) Estate agents

As Figures 5 and 6 in Section A showed, the expansion of estate agents branches has had a significant impact on the high street, although falling well below the phenomenal rise of building society branches. The URPI survey of 1977 (see Figure 5) showed that between 1965 and 1976 the rise

in the number of estate agents branches was of the order of forty-five percent. Figure 11 below, shows an increase of over one hundred percent between 1971 and 1982 in Leeds.

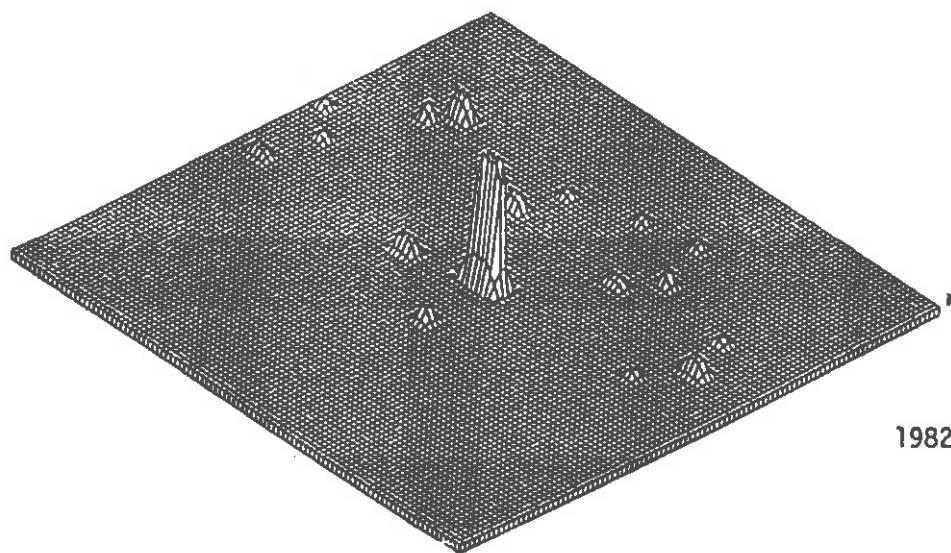
Figure 11. The rise of estate agents branches in Leeds

	<u>City branches</u>	<u>Suburban branches</u>
1961	8	8
1966	9	11
1971	6	12
1975	8	13
1979	10	23
1982	16	27

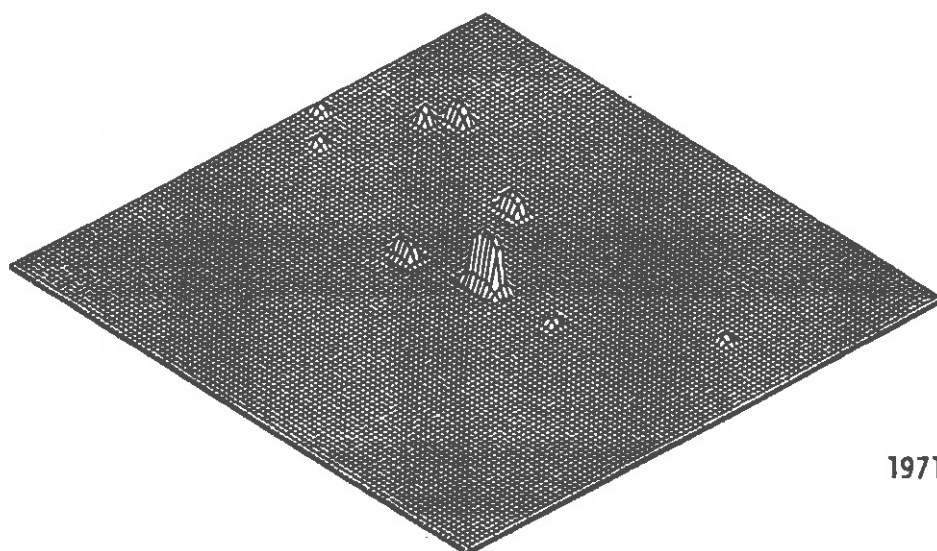
The suburban expansion of estate agents branches very much mirrors the rise of building society branches especially in terms of the centres selected (see Figure 11b). Again the importance of owner-occupation rates and socio-economic status are clear to see in the site selection procedures of estate agents. After all, the rise in residential estate agency is due to the increase in owner-occupation and the large increases in house prices experienced during the early and mid 1970s (see URPI 1980b, Hamnett 1982). Thus societies or agents look for areas of high owner-occupation rates. Also important in site selection, seems to be the so-called turnover for an area or the number of times a property comes up for sale, and the presence of any major housing development which will obviously provide long term business potential (for a fuller description see URPI 1980b).

Given this locational criterion it is not surprising to see Crossgates and Horsforth having the most suburban branches by 1982. However the distribution of estate agents branches is not as concentrated as the distribution of building society branches. Indeed many agents may well prefer a busy main road location to a pedestrianized shopping precinct. The success of a particular branch often solely depends upon its window display and the ability to attract 'window shoppers' outside hours of opening. Thus a location in a small parade of shops on a busy main road may be very attractive to estate agents. Indeed, for those branches which are located within shopping centres a peripheral site near or on the main road axis is often more desirable.

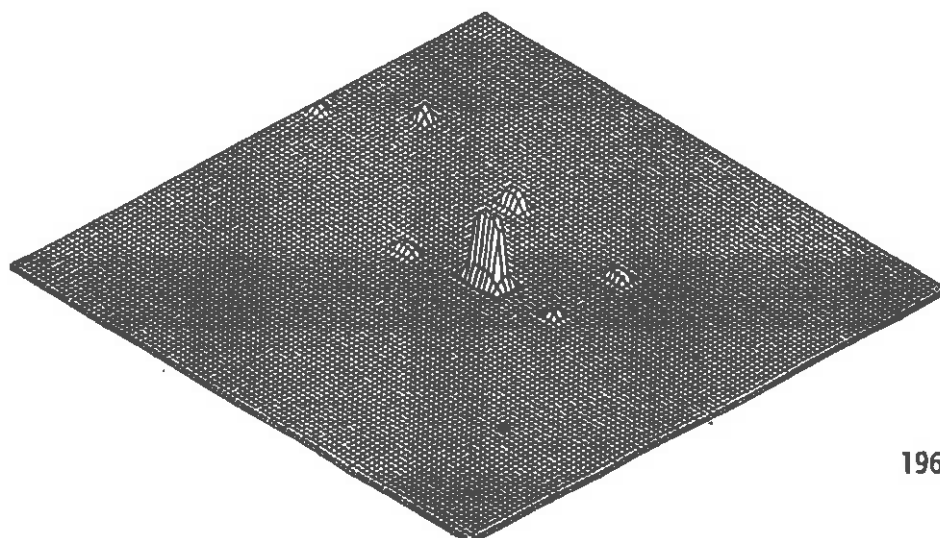
Thus more flexible location policy of many estate agents often also favours building societies, giving them the opportunity to be represented in areas which would not support a full building society branch, or where they



1982



1971



1961

Figure 11b. The expansion of estate agent branches across Leeds



are uncertain as to the full market potential. The estate agent thus acts as an agent for a particular building society. This is especially the case for non-local firms who may be entering the area for the first time or are not certain as to how many of its branches the area could support. In Leeds the two local firms do not need this kind of support quite as much, but the non-local firms depend upon agency support outside the major suburban centres. For example, the Halifax Building Society has just three full branches at Crossgates, Headingley and Pudsey whilst the other seven Leeds branches are all agencies. Similarly of the seven branches of the Bradford and Bingley Building Society only Pudsey is not an agency. However, whilst estate agents can afford to be more flexible in terms of branch location, shopping centres still tend to be the most favoured location especially for the larger firms, where at least a large and steady flow of pedestrians passing the branch is guaranteed. Indeed it is the policy of some agencies to aim to solely develop within shopping centres, eg. Winston (1979),

"Apart from seeking offices in the shopping centres of towns in which they were not represented, Mann and Co. have on several occasions sought to move to such centres from an existing office elsewhere in the same town. They do this because they invariably find that better trading positions produce improved business results".

It is finally worth noting that the past growth in branches in the smaller suburban centres seems likely to increase. As URPI (1980b) comment, "the opportunities are still seen for the one-man single branch business where market and local conditions are right. For the larger firms the satellite network of branch development is seen as offering considerable operating and cost advantages in the future".

### (iii) Other financial institutions

To complete this section it is necessary to note the rise of other, less popular, financial institutions such as insurance and assurance offices, solicitors and the new range of offices offering credit and loans often simply referred to as 'money shops'.

Insurance, assurance and solicitors offices have always been an important part of the office sector of cities but are now beginning to branch out onto more traditionally retail environments and it is the latter which is of interest here since city centre sites are still more office than retail (especially

first and second floor offices). Figures 12a and 12b plot the rise of these kinds of phenomenon on the high streets of our suburban centres. The rise of solicitors offices has tended to be steady with an exceptional expansion from 1975 to 1979. The insurance/assurance branch expansion has been rather more sedate and this is partly because firms such as the 'Prudential' and the 'Brittanic' have favoured locations within major shopping areas as far back as 1960 (albeit mainly secondary positions).

Figure 12. The rise of solicitors and insurance/assurance offices across Leeds suburban centres

	<u>Solicitors</u>	<u>Insurance/Assurance</u>
1961	4	12
1966	5	11
1971	6	15
1975	7	17
1979	12	18
1982	14	17

Finally, it is worth noting the rise of the so-called money shops (first referred to in Bird and Smith (1983)). The money shops are a recent innovation from America (Boston Money Shops being an example of one of the largest operators in the country), and are generally finance companies offering loans to the general public often against limited security. Bird (1983) has commented that because credit buying has become more respectable it is not surprising that finance companies have decided to enter into competition with banks and building societies more forcefully and hence also look to higher street locations.

So far these institutions are only present in the large shopping centres across the country and are represented in Leeds by companies such as H.F.C. Trust and Avco Trust. However it may not be long before they too begin to spread across suburbia.

(C) The rise of non-financial service outlets

(i) Bookmakers

The major URPI study of 1977 (see Figure 5) identified a growth in the number of betting shops, between 1965 and 1976, of the order of 160 per cent, the fifth largest rise of all the services considered. When considering the rise of betting offices in Leeds however, we are faced not with a growth in the total number of outlets but a decline. Figures 13a and b (Figure 13)

plots the fortunes of the betting office in Leeds since 1960,

Figure 13. The number of betting offices 1961-1982

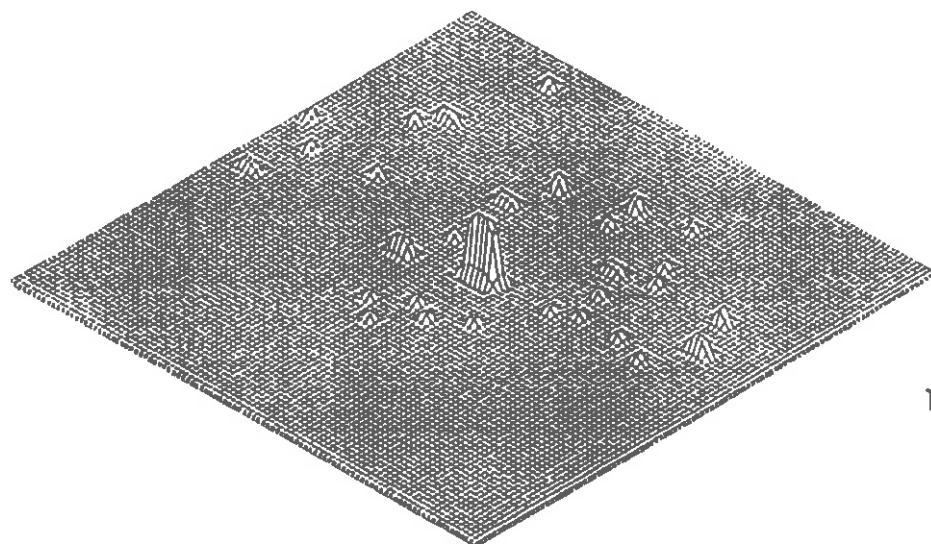
	<u>City centre</u>	<u>Suburban</u>
1961	21	28
1966	20	29
1971	16	34
1975	12	35
1979	10	34
1982	10	33

Thus, as Figure 13 shows, only forth-three outlets are present in 1982 compared to forty-nine in 1961 (for our centres considered). However, these figures do mask some important facts.

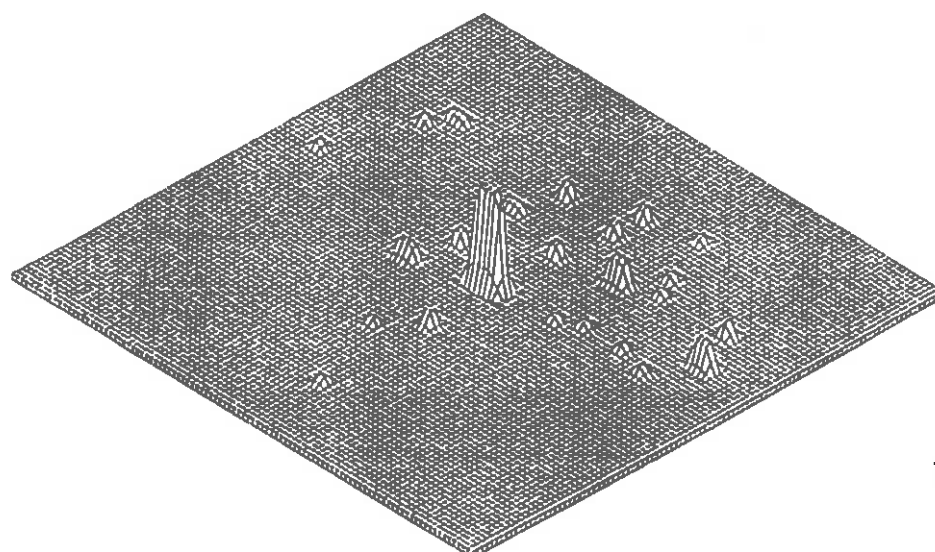
Before 1960 betting offices were not permitted to operate beyond the confines of the race course and therefore obviously do not appear on the high street. However, following the Betting and Gaming Legislation in the early 1960s, we see a sudden and rather dramatic appearance of outlets in principal shopping areas, indeed, as early as 1961 (see Figure 13). All the early betting offices were independents and generally opened wherever they could get good premises, be it high street or back street. The high number of betting offices in the city centre also gives us some clues to the suburban pattern. That is the early suburban pattern of betting offices was very much concentrated in the inner city areas and city centre fringe areas. For example, as Figure 13b shows, only eighteen of our centres in 1961 possessed a betting office yet twenty eight outlets were present outside the city centre. This is because of the concentration in areas such as Hunslet, Kirkstall Road, Armley, Harehills, Chapeltown and York Road.

By 1971 the trends towards de-centralization were well underway. With inner-city clearance projects and the consequent running down of inner-city shopping centres, betting offices were becoming more widely spread across the city. Thus by 1982, twenty nine suburban centres possessed betting offices. This expansion was not only due to inner city clearance programmes. Equally important were the rising suburban population, the rise of multiple groups in bookmaking, the impact of more stringent planning regulations (often resulting in only one outlet per centre and hence expansion) and the introduction of racing coverage on television (increasing the popularity in betting).

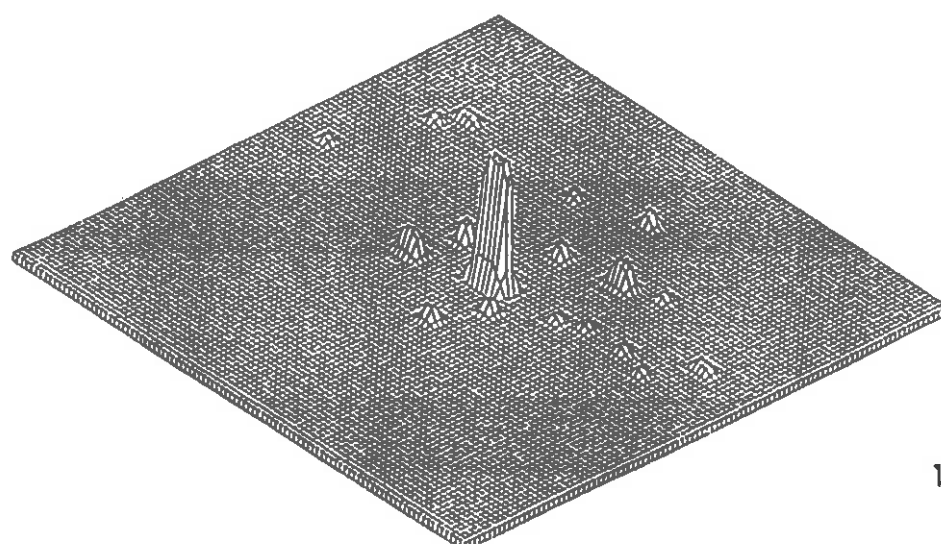
The decline of the independent bookmaker was rapid in the late 1960s



1982



1971



1961

Figure 13b.    The distribution of betting offices in Leeds 1961-82

and early 1970s. The first multiple firm to have an impact in Leeds was 'Windsors' who themselves had been taken over by William Hill by 1971. So dominant have the multiples become, we can now see the industry generally run by the so-called 'big four', Mecca, Ladbrookes, William Hill and Joe Coral. Figure 14 shows today's percentage ownership figures for betting offices in Leeds.

Figure 14. The ownership of betting offices in Leeds 1982

William Hill	51.2%
Peter Smith	11.6%
Ladbrookes	11.6%
Joe Coral	11.6%
Independents	9.3%
Mecca	4.6%

Thus by 1982 William Hill Ltd. had become by far the most dominant firm in Leeds. Peter Smith Ltd. is the second largest being a substantial regional company rather than a national one.

As the multiple groups have taken a stronghold on the betting industry they have brought in far more rigorous location strategies and a greater desire to be sited in as many centres as possible rather than concentrated in few. As URPI (1980a) comment,

"In common with many other service businesses, betting office companies realise the opportunities to be gained from adopting a more sophisticated trading image and are anxious to become an accepted part of shopping centres".

Moreover, in order to obtain a site within a shopping centre the companies have to prove to the licensing authorities that there will be sufficient demand for their services which is not already met elsewhere. This helps to explain why only one betting office is present in each centre. Also, of course, the companies have to obtain planning permission to open a betting office which helps local authorities to keep a check on the expansion of outlets.

In this connection with planning contracts it is interesting that the URPI (1980a) survey comment,

"All companies had experienced difficulty in obtaining premises in purpose-built managed shopping centres ... where entry had been gained into a managed shopping centre it has usually been as a result of difficulties that the developer has had in letting the units to retail companies".

However, in Leeds it seems that companies have been very successful in managed shopping schemes. For example the new centres at Bramley, Hunslet and Holt Park all contain, and have contained from their first days, a betting office whilst Ladbroke's have been successful in opening two offices in Seacroft Civic Centre, where indeed, only one building society has been accepted. It would seem that betting offices fit in well to managed shopping schemes in that they are quite keen on more peripheral sites which are more likely to be offered where rents are much lower and other retailers may not be so interested. Also peripheral sites are often closer to public houses where betting offices can draw upon the large, predominantly male clientele, yet still enjoy the steady pedestrian flow of the shopping centre.

(ii) Cafes, restaurants and take-aways

Figure 3 showed that of all the service sectors, one of the fastest growing has been the cafes and restaurants (50% increase between 1965 and 1976) and more recently take-aways (700% increase) section. The so-called 'eating out' food sector comprises of a number of different sections, and the growth of each section is plotted for Leeds in Figure 15a below. Figure 15b shows the spatial expansion of one sector (restaurants).

Figure 15a. The rise of the 'eating out' food sector 1961-82  
(in numbers of outlets)

	<u>Cafes</u>		<u>Restaurants</u>		<u>Traditional chip shops</u>		<u>Chinese take-away</u>		<u>Take-away</u>	
	<u>City</u>	<u>Sub.</u>	<u>City</u>	<u>Sub.</u>	<u>City</u>	<u>Sub.</u>	<u>City</u>	<u>Sub.</u>	<u>City</u>	<u>Sub.</u>
1961	29	12	8	5	6	27	-	-	-	-
1966	31	14	6	8	6	28	1	7	1	2
1971	41	16	19	15	3	34	3	12	3	7
1975	24	10	21	17	3	37	4	13	7	12
1979	18	11	22	18	4	36	3	19	9	11
1982	21	10	28	21	4	38	4	17	8	13

As Figure 15a shows the eating-out food sector has not expanded uniformly. The number of cafes has declined since its peak in 1971. This coincides with the decline of the traditional tea shop, such as Lyons, and the once popular milk-bar. Restaurants (see Figure 15b) on the other hand, have experienced quite a rapid expansion both within the city centre and the suburban centres, as too have the Chinese take-aways

22a -

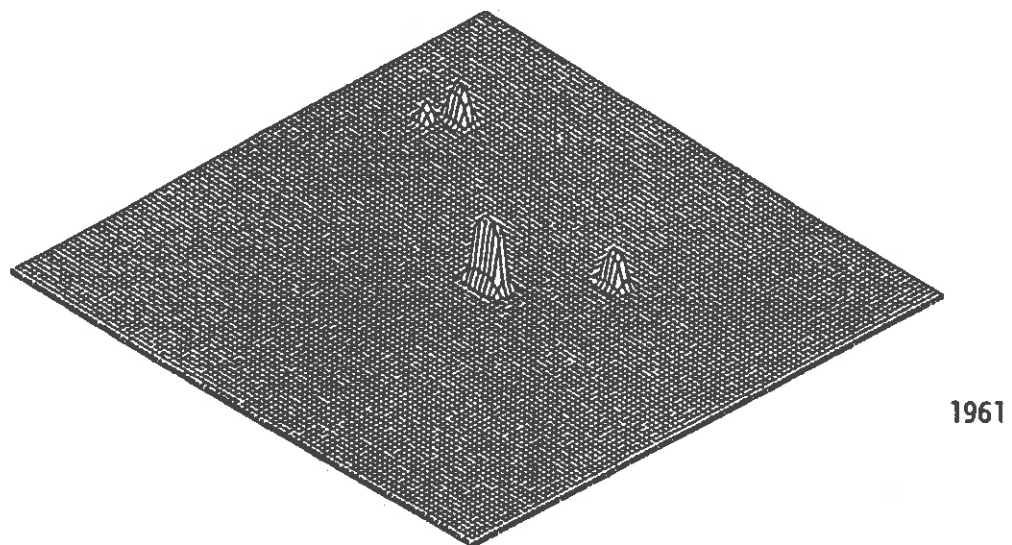
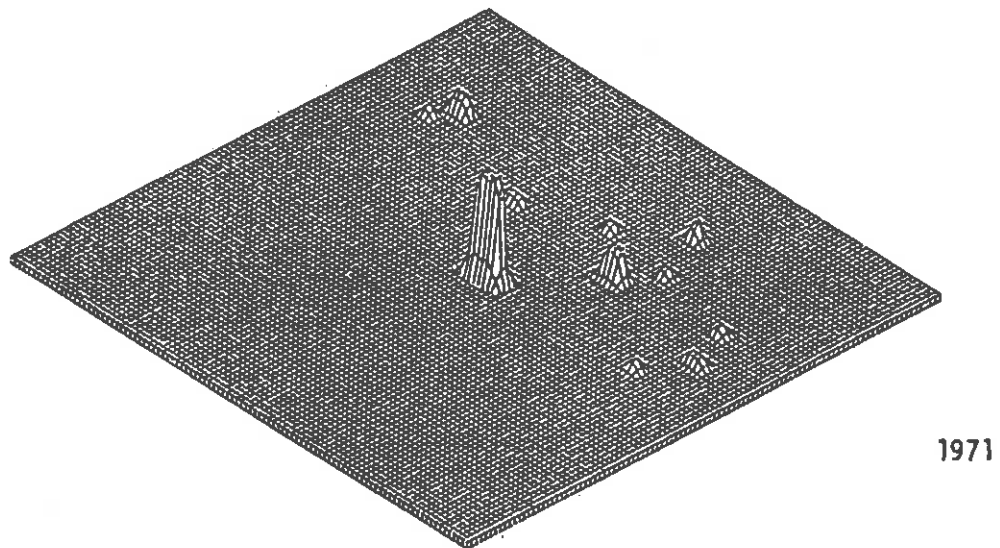
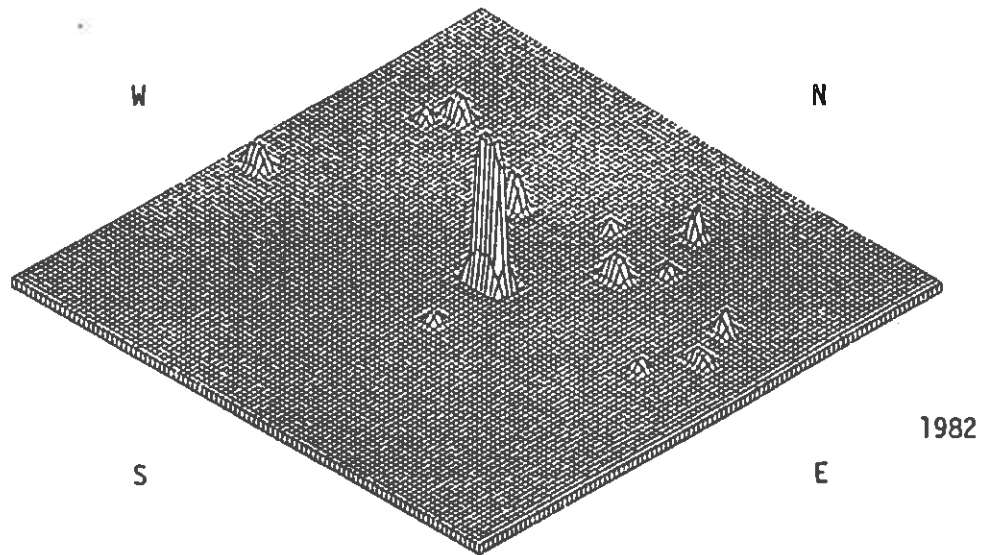


Figure 15b.    The distribution of restaurants in Leeds 1961-82

and the take-aways in general (the latter associated with the so-called 'fast food' sector, primarily dealing in hamburgers, beefburgers, etc.). Quite surprisingly perhaps the traditional fish and chip shop has also retained its importance on the high street.

Catering is clearly very important to the viability of a shopping centre especially in those centres which attract a large percentage of car-borne shoppers who may be away from home for some time. Indeed, Schiller has even postulated that a hotel and restaurant index be incorporated into spatial interaction models in order to produce more realistic attraction parameters (Schiller, 1972). Similarly Coombes (1980) comments,

"A shopping centre without good catering is clearly a poor attraction to a customer planning to spend anything over two hours in the place. And even for a shorter time, good catering has plenty of opportunity to encourage impulse sales".

Coombes goes on to quote Orchard-Lisle who claimed he was "finding nationwide that catering exerts a material pull to shopping centres and that lack of this provision can influence a housewife to shop elsewhere".

To capture something of the growth of this sector attention will now focus on the relatively new trend of providing 'fast food' or simply referred to as take-away in Figure 15a. Smale (1980) defines a fast food outlet as a place "where a customer is served within five minutes of entering the outlet, even at peak periods". In order to achieve this most outlets have only a limited product range, ranging from hamburgers and beefburgers to chicken and chips, and a systematised production process.

Two broad outside stimuli are generally seen to have stimulated investment in this sector of the food industry. Firstly broad demographic changes, with an increased amount of single and smaller households, and secondly a change in general lifestyle patterns where eating out has become an accepted way of life, even fashionable in some circles, and convenience foods have become popular.

Because this kind of operation is expensive and because these operations rely to a large extent on impulse buying the operators tend to look for prime high street locations where a large pedestrian flow is guaranteed (even if this means paying rent in excess of £25,000 in some areas).



Having decided on a prime site within a shopping area there is still the problem of actual site selection. For a general location policy it is interesting to quote Smale (1980) of Wimpey International,

"Our site selection criteria are still in their infancy and based very much on human experience on what similar sites have achieved in the past. We eventually hope to have a better model which would fit in the relevant criteria and project the sales that would be achieved. At present we consider such things as customer counts, other multiple retailers, car parking, entertainment, etc. ..."

It seems then that the locational policy of a fast food operator may not be so different as every other service operator!

Once again however, it should be noted that fast food outlets will present problems to a local planning authority, with planning permission the first hurdle to be overcome. The basic problems which planners foresee with fast food outlets are congestion, in terms of parking facilities, appearance, smell and fumes, litter and general effect on the character and amenity (see Hilton (1980) for a review of the problems).

It is undoubtedly true that there will always be a role for catering facilities within shopping centres. It is fitting to leave the last words to Coombes who confidently predicts that, "the impetus of new catering techniques sparked off through 'fast food' developments will have considerable relevance to the exciting possibilities for catering within the retail scene" (1980, p.27).

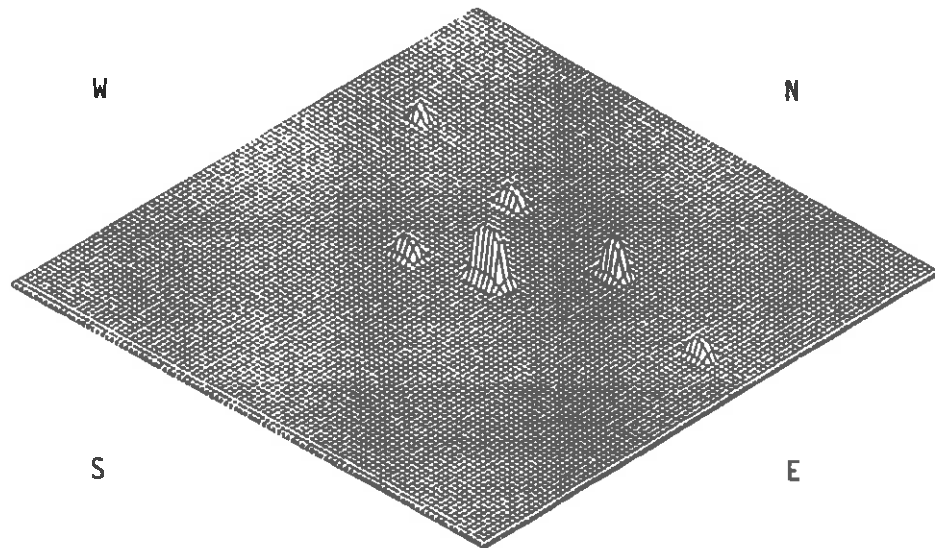
### (iii) Videos and instant prints

In Section A it was mentioned that many of the important changes in the service sector expansion on the high street have been post-1977, or the time of the URPI survey. The rise of video shops and instant print shops has taken place only over the last few years as Figures 16a and 16b show.

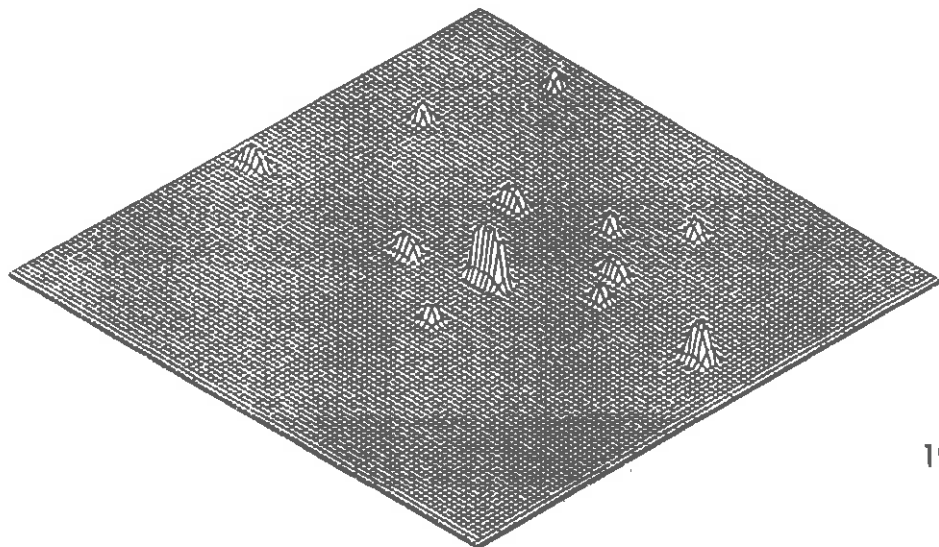
Figure 16a. The rise in the number of video and instant print outlets

	<u>Video outlets</u>		<u>Instant print shops</u>	
	<u>City</u>	<u>Suburban</u>	<u>City</u>	<u>Suburban</u>
1979	1	-	-	-
1982	3	14	3	6

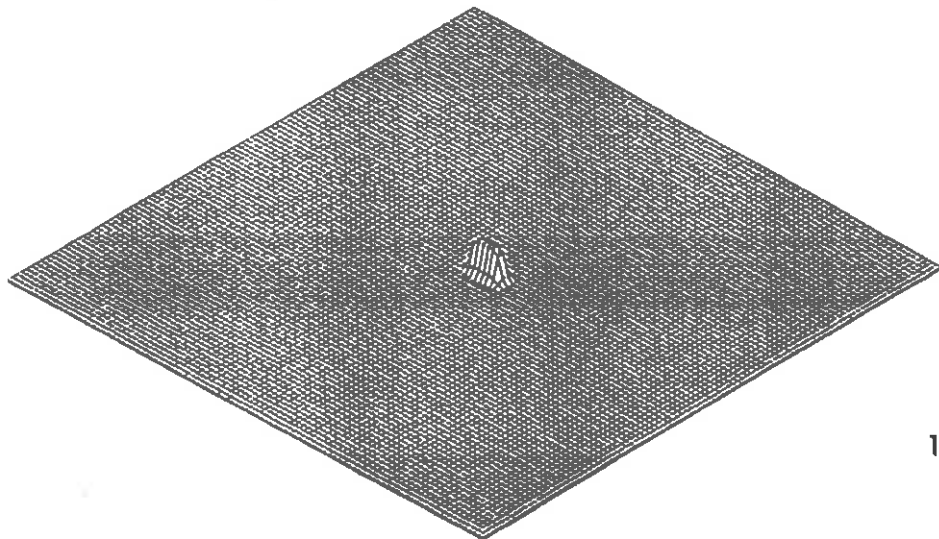
- 24a -



The distribution of film processors, 1982



1982



1979

Figure 16b. The expansion of video outlets

The rapid post-1979 rise of video outlets has been due to the equally rapid rise in home entertainment facilities of which the video is just one aspect. However, with the rise of much cheaper Japanese machinery, and the increasing ability for consumers to rent machinery, has come a subsequent demand for films and tapes and hence outlets to provide them. The majority of video outlets are so far run by independents, a feature of the newness of the industry, yet some firms have also "jumped onto the bandwagon" by devoting part of their stock to video films.

In Section B an examination was made of the functions which had been replaced by building society branches. Due to the newness of video outlets it is apt to undertake a similar examination. Figure 17 plots the kind of functions which have been lost to the seventeen outlets currently open in our shopping centres.

As Figure 17 shows, the loss of traditional retail functions has been a lot higher in comparison with the loss to building societies shown in Figure 10.

Figure 17. Types of functions replaced by video outlets in Leeds shopping centres, 1982

<u>Traditional retail functions</u>		58.82%
Menswear	2	
TV rental	2	
Wool/drapery	3	
Ladieswear	1	
Craft shop	1	
Car accessories	1	
<u>service functions</u>		5.88%
Hair salon	1	
<u>vacant properties</u>		17.64%
plus	<u>floorspace allocated to video hire</u>	17.64%
Record shop	1	
Travel agents	1	
D.I.Y.	1	

This may well be due to the inconsistencies of the Use Classes Act. Under this Act, it will be remembered, building societies required to obtain planning permission in order to transfer a retail outlet into a branch office (although societies would argue their operations were more like a traditional shop, with the buying and selling of money, than an office!).

However, under the same Act, a transfer from retail use to video tape hire does not require planning permission and therefore operators have found it relatively easy to convert traditional retailing premises.

Outside shopping centres the growth of video outlets has been just as rapid. For example one of the largest operations in Leeds is currently the "Armley drive in video library" which has preferred to locate away from the main shopping areas. It began its operation in a small, single unit office-like development approximately half a mile from Armley shopping centre on the main Leeds to Bradford trunk road. Due to an intense local advertising campaign it soon built up a large clientele, concentrating its attack on low rental charges, easy access and, especially, excellent car parking facilities (hence the term 'drive in'). With rising popularity Armley video library was forced to look for alternative accommodation and was successful in obtaining a much larger, warehouse-type outlet where it could provide not only a vast increase in its range of stock and car parking facilities but also a children's playground and reception area.

The growth of video outlets has almost been matched within shopping centres, by the growth of instant print shops or film processors. In comparison with video operators, the instant print market has been dominated by the multiple groups. 'Supersnaps' has been the most important group in Leeds. It is interesting that these groups have also demanded prime retail sites in the centre of the main shopping areas. Clearly they feel maximum pedestrian flows are vital to success. Thus, currently only the major suburban centres of Horsforth, Armley, Crossgates, Headingley and Harehills have attracted instant print shops (see Figure 16b).

The rise of print shops was generally aimed at cutting off the virtual monopoly held by major film companies and leading chemists. It is interesting though to quote Keith Waterhouse's view again,

"The most surprising high street innovation is the rise and rise of the instant print shop. A few years ago the demand for high street printing shops was on a par with the demand for high street aircraft hangars. Then instant printing was invented - and the supply spawned the demand!"

#### (iv) Travel and employment agencies

Finally, a consideration can be given to travel agents and employment agents which are also high on the URPI list of major service

expansions (see Figure 5).

Figure 18a plots the rise of both activities in Leeds, whilst Figure 18b plots the spatial expansion of travel agents.

Figure 18a. The growth of travel and employment agency outlets in Leeds

	<u>Travel agents</u>		<u>Employment agents</u>	
	<u>City</u>	<u>Suburban</u>	<u>City</u>	<u>Suburban</u>
1961	7	5	-	-
1966	7	6	-	-
1971	13	8	3	-
1975	18	11	5	-
1979	19	16	4	-
1982	22	22	5	-

As figures 18 show the rise of travel agents has been rapid during the 1970s especially in terms of suburban expansion. Once again the early centres selected were the largest and more affluent areas although by 1982 a more widespread coverage had been achieved. Undoubtedly the rise of the 'package holiday' throughout the 1970s has instigated this high rate of growth.

The rise of employment agencies has so far been restricted to the city centre in Leeds and seems to be less vigorous than the findings of the URPI survey (see Figure 5). However, coupled with the growth of employment agencies, has been the expansion of job centres. The job centre was the creation of the Manpower Services Commission in the early 1970s, the first branch opening in Reading in 1973. By 1982 nationwide expansion had been rapid and Leeds currently boasts branches in the city centre and at Pudsey, Seacroft, Bramley, Horsforth, Hunslet and Crossgates. Robinson (1979) stresses that because the aim was to promote non-Governmental, non-institutionalised centres they ought not to be tucked away in back streets - hence their prominent high street locations. Indeed Robinson quotes R. Hardman of the Evening Times,

"the Manpower Services Commission is well on the way to becoming one of the largest retail chains in the country".

27a -

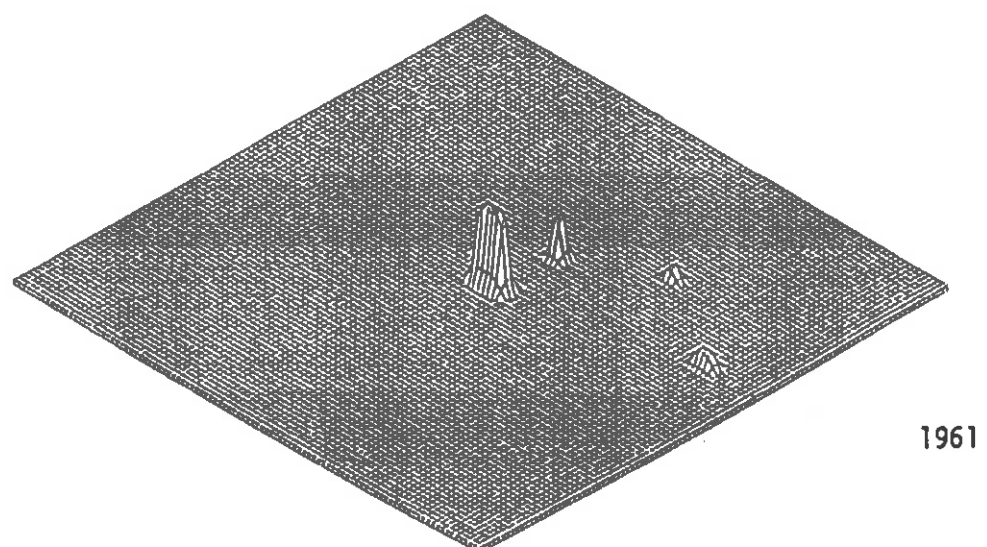
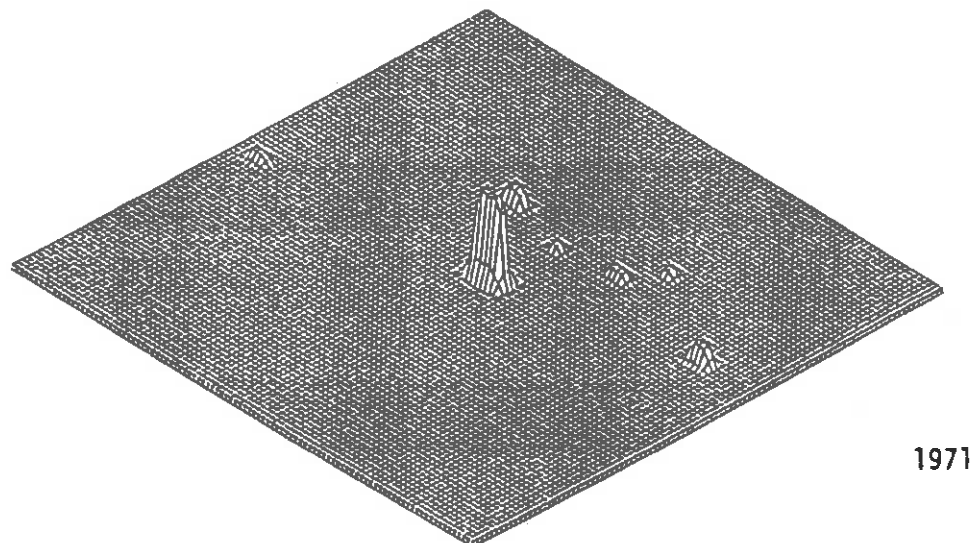
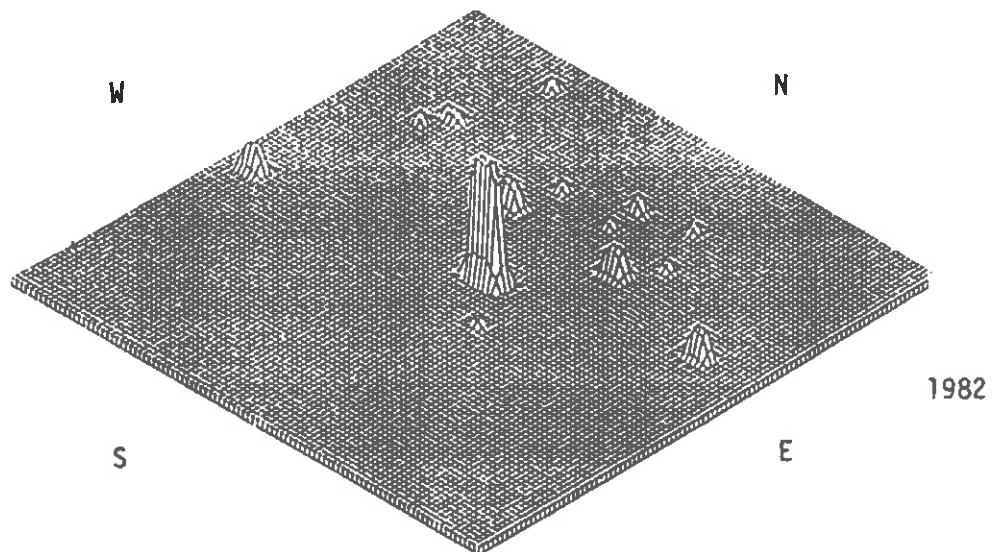


Figure 18b.    The expansion of travel agents in Leeds 1961-82

### Conclusions

This study has focussed on the rapid growth of service outlets in Leeds since 1961 aiming to bridge a gap in the literature since the URPI study of 1977. Having noted some of the reasons for this rapid growth and some of the planning issues, one is left pondering on the overall impact on the high street, both to consumers and retailers. It has already been mentioned how difficult it is in fact to measure the impact but perhaps two of the more obvious indicators would be vacancy rates and rates of turnover.

Figure 19 shows the levels of vacancy and the levels of turnover for the centres previously used in Figure 2, from 1971 onwards (reflecting the most buoyant period of service expansion).

Berry (1963) in his classic study of Chicago concluded that vacancy rates were higher in lower income areas and in areas of social change. This seems a logical argument in that these kinds of areas are more prone to uncertainty especially in times of recession. In Leeds this is partly confirmed by Woodsley Road, which we could define as a low income area, and Hyde Park, which has certainly seen a period of important social change (physical decay, re-development and slum clearance, influx of ethnic minorities, etc.). Thus we can see these areas with a generally high level of vacancy rates.

However McEvoy (1972) concluded, for his study of vacancy rates in Manchester, that "Berry's suggestions that the level of vacancy rates is connected with the social status of an area was not confirmed" (p.66). McEvoy himself however seemed unable to put forward any positive reasons himself. This is a little surprising in that McEvoy talks of the changes in the retail system and vacancy rates as separate issues whereas clearly they are vitally linked. For example, Figure 19 shows Hollin Park and Crossgates as having fairly high levels of vacancy. These are two areas which have experienced rapid service expansion since 1971 and consequently will have higher rates of re-occupancy. This is also reflected in the turnover rates for the centres selected. Those centres which have experienced rapid expansion of services must have experienced a significant turnover of properties. However, the high turnover rates of Armley, Woodsley Road and Hyde Park (shown in Figure 19) still seem to give support to Berry's original conclusions of 1963.

Figure 19. Vacancy levels and rates of turnover in selected centres in Leeds, 1971-1982

	<u>Percentage of outlets changing hands</u>		<u>Percentage of outlets vacant at time of study</u>	
City Centre	1971-75	50.92	1971	8.69
	1975-79	40.82	1979	7.61
	1979-82	32.81	1982	6.74
Crossgates	1971-75	23.80	1971	4.76
	1975-79	26.49	1979	3.33
	1979-82	24.18	1982	1.96
Moortown	1971-75	20.00	1971	2.85
	1975-79	25.71	1979	2.85
	1979-82	22.85	1982	0.00
Hollin Park	1971-75	50.00	1971	6.25
	1975-79	17.64	1979	5.55
	1979-82	38.88	1982	0.00
Armley	1971-75	39.21	1971	0.00
	1975-79	29.12	1979	2.94
	1979-82	30.47	1982	1.90
Middleton	1971-75	38.88	1971	5.55
	1975-79	25.00	1979	10.00
	1979-82	4.34	1982	4.34
Woodsley Road	1971-75	41.66	1971	12.50
	1975-79	34.78	1979	0.00
	1979-82	23.80	1982	4.76
Hyde Park	1971-75	52.63	1971	2.63
	1975-79	26.31	1979	10.53
	1979-82	36.84	1982	15.78

(1975 not included because  
several outlets are  
missing)



Yet, in terms of the effect of service expansion on retail functions within shopping centres, the examination of Figure 19 seems rather misleading. That is, we would expect high rates of turnover in those centres experiencing rapid service expansion as that transformation takes place. Perhaps it is more appropriate to examine the turnover rates of those properties which have remained purely retail. Figure 20 plots the turnover rates for non-service outlets for a selection of centres which currently have a high rate of service expansion.

Clearly, from Figure 20, the figures for the rates of turnover are extremely varied across the selection of centres, making generalisations difficult. Moortown and Horsforth New Road Side tend to go against the general pattern however, being the only centres to experience higher rates of turnover for the period 1979-82. All the other centres have shown a marked reduction. Couple this with the generally lower vacancy rates for 1982 shown in Figure 19, and there does not seem to be much evidence supporting the idea that service outlets have been detrimental to the viability of today's shopping centres. Perhaps the only conclusive evidence could come from actual monetary turnover figures although again variations in these over time might be due to other factors than service expansion.

Given this above, one wonders whether the so-called 'problem' of service expansion really exists at all. Indeed Fernie and Carrick (1983) are beginning to come to this conclusion, after many years of investigating planning responses to quasi-retail expansion. Refreshingly, from a planning point of view, Stocks (1979) seems in little doubt as to the role of services on the high street,

"Any professional planner must firmly say that shopping centres are also service centres and the two functions must live and grow together".

Having examined the growth of service outlets up to 1982 the final question indeed seems to be, can traditional retail outlets keep apace as stocks would like? This should encourage further work in the future.

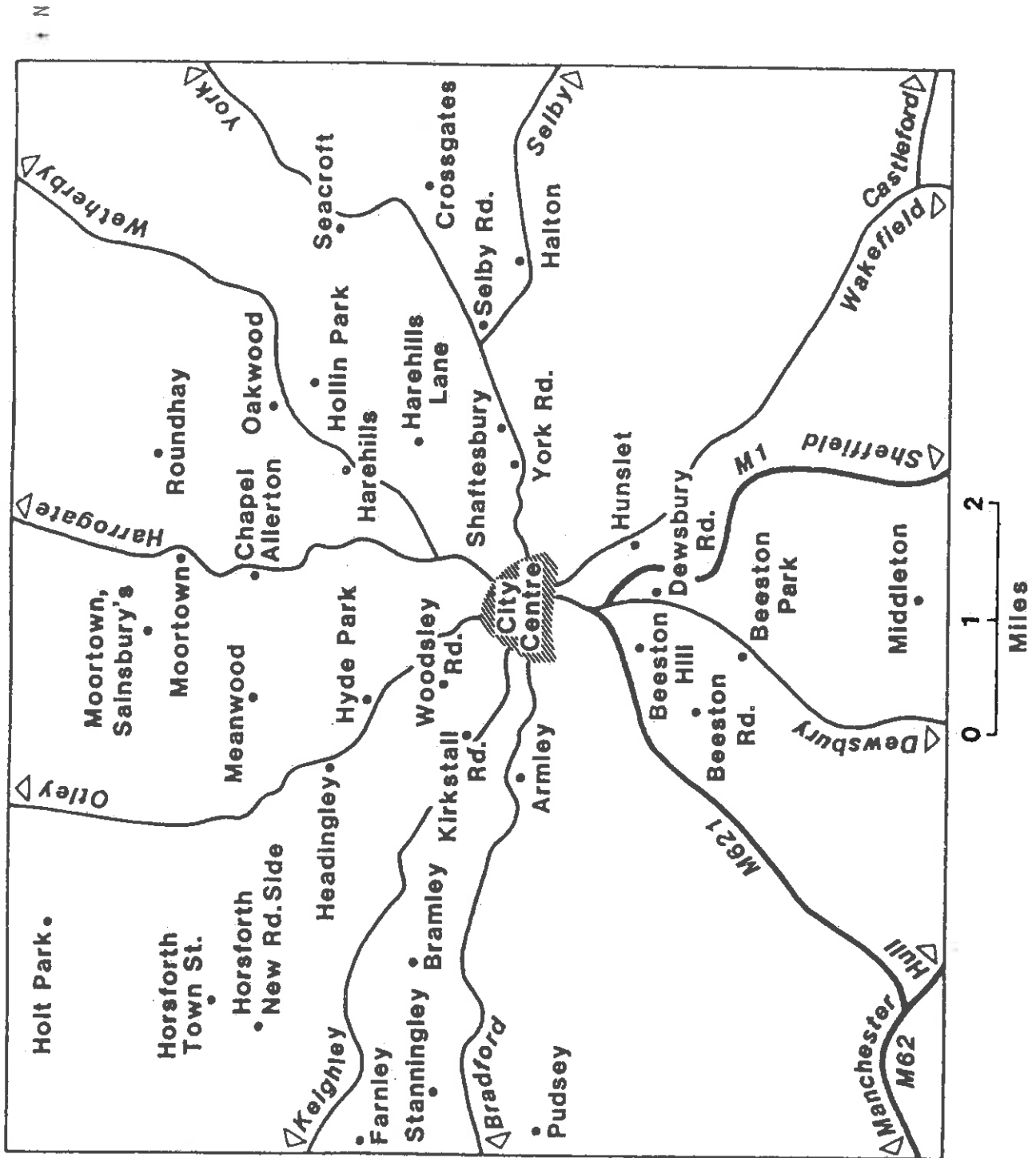
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Figure 20. Turnover rates of non-service retail outlets in selected centres of Leeds, 1971-82

	<u>% of outlets changing hands</u>	
Crossgates	1971-75	23.89
	1975-79	29.80
	1979-82	24.24
Moortown	1971-75	11.11
	1975-79	31.57
	1979-82	33.33
Headingley	1971-75	26.96
	1975-79	25.00
	1979-82	20.93
Horsforth Town Street	1971-75	27.02
	1975-79	48.64
	1979-82	18.75
Horsforth New Road Side	1971-75	21.62
	1975-79	30.76
	1979-82	33.33
Roundhay	1971-75	57.14
	1975-79	29.41
	1979-82	15.78
Oakwood	1971-75	40.90
	1975-79	37.50
	1979-82	20.83
Hollin Park	1971-75	57.14
	1975-79	30.76
	1979-82	16.66

Appendix A. The shopping centres of Leeds



Appendix B. Service functions identified in the survey

Building societies	*
Estate agents	*
Insurance/Solicitors outlets	
Travel agents	
Dry cleaners	Ø
Launderettes	Ø
Shoe repairers	
Hair salons	
Employment agents	*
Job centres	
Book makers	Ø
Video outlets	
Film processors (instant print shops)	
Cafes	Ø
Restaurants	Ø
Chinese take-aways	Ø
Fast food take-aways	Ø
Traditional fish and chip shops	
Driving schools	*
Gas showroom	
Electricity showroom	
Banks	*
Opticians	
Amusement arcades	Ø
Hearing aid service	
Photographers	
Health studio	
Photocopiers	
Removal offices	
Finance agents or money shops	
Public houses	Ø

\* classed as offices under the Use Classes Order 1972

Ø unspecified uses under the Use Classes Order 1972

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