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THE CHANGING MORPHOLOGY OF URBAN RETAILING  
IN THE RECESSION

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# THE CHANGING MORPHOLOGY OF URBAN RETAILING IN THE RECESSION

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## 1. INTRODUCTION

In a recent article in 'Retail Distribution and Management', it was reported that the last decade was "arguably the most action packed in retail history." (RDM 1983 p.4). Indeed the term 'marketing revolution' has often been applied to some very radical innovations. (Excellent reviews can be found in Dawson 1980, 1982 and Guy 1980). On top of these innovations have come significant changes over the last five years in the U.K economic structure. Tight Government monetary policy coupled with a world-wide recession has thrown the country into new heights of unemployment and general economic depression. Undoubtedly this new period of recession has also played a significant role in shaping the general directions in which urban retailing has recently moved.

Recent literature on the impact of the recession on retailing has been mainly concentrated in trade and distribution journals. Within this literature, there seems to be a great degree of uncertainty amongst commentators regarding the questions of how the recession is affecting retail trade and how current retailers assess the problems. A commentator in 'Shop Property' seems to neatly sum up the general pessimism during the early stages of the recession,

"Talk to any shop agent about the prospects for 1981 and the usual articulate flow of names, facts and figures, rents and yields will suddenly cease. The confident exposition of the high street gospel will give way to a baffled silence broken only by a series of ifs and buts, leading inexorably to an admission that the way ahead is heavily shrouded in mist. One should tread carefully." (Shop Property 1981 p.12)

However, a far more optimistic atmosphere seems to emerge post 1981. The literature generally reports 1982-1983 as a period of rising sales, culminating in the great Christmas boom of 1982. Churchill (1983) notes how lower interest rates, especially for mortgages and bank-overdrafts, put more money into the pocket of the average consumer. Churchill continues,

"Then the rate of inflation started to fall significantly- a trend which appeared to give consumers confidence in their economic outlook in spite of the continuing rise in unemployment." (p.13)

Also of vital importance was the abolition of hire purchase controls in certain retail sectors, such as electrical appliances, televisions and videos, coupled with the ever-increasing acceptability of credit purchasing. Ross (1983) perpetuates the optimism by suggesting that this spending boom would in fact be sustained over the next few years.

Besides these general reports, there seems to be a great deal of optimism in numerous regional studies. Sands (1981) concludes that Doncaster is 'riding the recession', quoting one agent who claims,

"Retailers always seem to complain about trading figures but the recession hasn't really caused them to shout any louder."

and commenting himself,

"There is always high demand for shops in prime positions and any units that come available are still disposed of fairly readily. Although the attitude of retailers has hardened, the marketability of units has not been affected." (Sands 1981 p.24)

Similarly, Hobday (1982) reports how well the North East had stood up to the effects of the recession. She notes, for example, that despite unemployment of around 15% in Sunderland, there has continued to be a good demand for shop units. However, in the same article she also reports on the problems faced by the retailers in Consett, following that with a later article, Hobday (1983), suggesting the recession has at last caught up with Newcastle.

The general optimism in the trade journals is perhaps not very surprising given the need to maintain sales themselves in more difficult times; who wishes to continually read about doom and gloom? Secondly, and more importantly, many of these studies have been based on what is now happening in the largest shopping centres, which may well mask the real effects of the recession on urban retailing; that is, how has the structure of the smaller shopping centres been affected compared to the larger ones? Similarly, what are the spatial variations across the city given the spatial variations in the changing social geography? It is the aim of this paper to explore these questions more fully.

Before proceeding however, it is of course important to note the great difficulty in isolating the impacts of the recession from other aspects of change. Retail change is without doubt an interplay of forces. Dawson (1982) notes,

"As with the consideration of the consumer institution, the trends in the industry may be related to organisations, technique and environment, but to understand the underlying processes the interactions in the industry have to be understood." (Dawson 1982 p.140)

This is a particularly important point and one which needs to be continually borne in mind.

However, the aim here is to compare the retail structure in Leeds since 1971 focussing on the changing social geography of the area. Can we see any direct or indirect effects of the recession? The first step is a brief look at that changing social geography.

## 2. THE CHANGING SOCIAL GEOGRAPHY OF LEEDS 1971-1981

Before analysing retail change it is necessary to briefly consider the spatial expression of the current recession. This will obviously aid the discussion on retail change for particular centres.

Fig.1 shows male and female unemployment rates expressed in quartiles as a percentage per ten thousand of the population (1971 and 1981), and in quintiles for the change from 1971 to 1981. The ward names are given with their locations in Appendix A. Figs.1a and 1b show the generally higher rates of unemployment in the central and southern wards for both male and females, whilst fig.1c shows that the west and south of Leeds experienced the highest rates of increase between 1971 and 1981.

By 1981 therefore, the wards of highest unemployment were Harehills, Chapel Allerton and University to the immediate north of the city, (all areas now housing high rates of ethnic communities) followed by City and Holbeck, Burmantofts and Richmond Hill to the east and Hunslet and Beeston to the south. As one might expect the lowest rates were found in the more affluent northern suburbs, especially Wetherby, North, Otley, Cookridge and Garforth. (Wetherby showed the highest rate of male unemployment in 1971, a temporary phenomenon caused largely by the closure of the munitions factory at Thorpe Arch). The wards showing the largest increases between the Censuses tend to be the western wards, including Beeston and Pudsey (north and south), and the southern wards of Middleton and Hunslet. Harehills and Chapel Allerton again have high rates of increase.

Fig.2 shows a further indication of the north/south split of affluence in Leeds, plotting 'upper class' and 'working class' concentrations. The 'upper class' band consists of socio-economic groups 1-4 and 13, whilst the 'working class' band consists of groups 7-11 and 15. The values are expressed as rates per ten thousand, with the range again divided into quartiles for the 1971 and 1981 totals and quintiles for the 1971-1981 change.

As with the unemployment figures the north of Leeds comes out to be most favoured in terms of affluence, whilst the south and, to a lesser extent, the west show the greatest concentrations of 'working class'. The highest rates of 'upper class' concentrations are thus Cookridge, North, Horsforth, Moortown, Roundhay and Wetherby, whilst the lowest rates are for Hunslet, Richmond Hill, Middleton, City and Holbeck, University and Seacroft. Not surprisingly the highest rates of 'working class' concentrations are in Hunslet, Middleton, Bramley, Burmantofts and Richmond Hill, whilst the lowest rates are in Roundhay, Moortown, North, Cookridge, Halton, Horsforth and Wetherby.

Once again it is Harehills and Chapel Allerton which have experienced the highest increase in 'working class' concentrations between 1971 and 1981.

These two simple Census variables have thus given a brief flavour of the current and changing social geography of deprivation/affluence in Leeds since 1971. This will be useful for identifying and examining retail change.

### 3. THE DATA TO BE EXPLORED

In order to examine retail change four time periods and thirty three shopping centres have been chosen. (All the data comes from a larger study on retail change, Clarke 1984). The time periods chosen are 1971, 1975, 1979 and 1983: the latter years have been selected to represent the current period of economic recession, whilst 1971 and 1975 have been included to gain some comparisons and thus help to paint a picture of contemporary retail change.

The 1971 data comes from a survey undertaken by the Leeds City Planning Department concerning retailing across the entire City. A similar survey for suburban centres was undertaken by the same body in 1979 and this was used in conjunction with a Goad map for the city centre. (Indeed all the available maps of C.E.Goad were used over time. These are shopping centre plans covering the major centres nationwide. They include information on shop size and ownership and are generally available every two years).

For 1983 the author undertook his own survey, again for all the shopping centres across Leeds. Finally, 1975 data was made up of a combination of Goad maps, land-use surveys (again Leeds City Planning Authority) and 'Yellow Pages'. It provided the least accurate data set, especially for the smaller centres, yet still accounted for between 90-95% of all shops!

The shopping centres themselves were chosen on the basis of size. Centres of generally less than twelve shops were not included. Hence the smallest centre was Selby Road with just a dozen shops and the largest was the City Centre with approximately 950. All the centres can be identified from the map in Appendix B.

### 4. THE RECESSION AND RETAIL MORPHOLOGY

The aim of this section is to examine the changing retail structure of Leeds in light of the current economic recession. Two broad themes will be considered, the first regarding what could be called 'direct' measures of the health of a particular centre and the second to more 'indirect' measures. The former will include vacancy rates and rates of property turnover, whilst the latter is more concerned with the spatial variations of changing patterns between shopping centres.

#### Vacancy Rates

The first and perhaps most obvious 'direct' measure of the health of a particular shopping centre is the level of vacant properties. Fig.3 shows the vacancy rates, (as a percentage of the total number of outlets), for all centres in Leeds in 1971, 1979 and 1983. (1975 has been excluded because of the

inability to distinguish between vacant properties and properties which were simply unidentified). These computer plots will be used throughout the paper. The shopping centres of Leeds 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. They are scaled according to the size of the highest peak).

It is evident from figs.3a-3c that the levels clearly fluctuate from year to year. However, certain trends seem to be emerging by 1983. Concentrating on 1979 and 1983 one can detect three centres which have the highest rates for both years: these are Hyde Park, kirkstall Road and Holt Park. Elsewhere there are relatively high rates in Harehills and the centres of Beeston. The important question is can we find any regularities in this pattern?

Relatively little work has so far been undertaken on vacancy rates, the most well-known being McEvoy's study of Manchester for 1966 and 1971. He concludes that most of his findings were in fact 'negative'. Thus he reports that 'vacancy rates were shown to be unrelated to hierarchical levels' and there was 'no connection with social status' or indeed with population change. (McEvoy 1972 p.66). His one positive conclusion was that 'higher vacancy rates may result from the disappearance of less important shops to a greter extent than major ones', as Berry had hypothesised in 1963 for Chicago. (Berry 1963)

From a purely statistical point of view this paper would agree with McEvoy's conclusions. No statistically significant correlation could be found between any of the above variables and vacancy rates using a standard multiple regression package. (in this case Sellers et al 1979). However, it could be argued that this would be expected given the complex inter-relationships between these variables. This will be explained below as each of these variables is discussed in turn.

The correlation between size of centre and vacancy rates was one of the weakest to emerge from the package: The City Centre had the sixth highest vacancy rate of all centres in Leeds in both 1979 and 1983. With the building of first the Merrion Centre, and secondly the Bond Street Centre, the core of the retail area has shifted over the last ten years or so. The effects of such shifts has been well documented before, (see Bennison and Davies 1978,1980), and in Leeds this also has resulted in the emergence of many so-called 'fringe' areas with much higher rates of vacancy.

This division between 'core' and 'fringe' is no less prominent than on Briggate. (see Appendix C). Briggate is one of two major shopping streets running north to south through the city centre. Northern and central Briggate remain within the retail core, on route to the market and central bus station, and hence the number of vacant properties is very low: only one vacant property in 1983, on North Briggate. Southern Briggate however, is fast approaching something of a retail wilderness with a large number of vacant properties; Of the twenty three properties remaining in 1983, seven are currently vacant.

Away from the City Centre many of the other large centres currently have high vacancy levels. Harehills for example, the sixth largest centre in 1983, had the fourth highest vacancy rate in 1979 and the seventh in 1983. Conversely, Selby Road, Hollin Park and Shaftesbury Corner, three of the smallest four centres, recorded zero vacancy rates for both 1979 and 1983.

Of greater importance for this paper, is the relationship between affluence, social change and vacancy rates. Berry (1963) for his work in Chicago, concluded that vacancy rates were relatively low in high income areas and highest in areas of social change. The relationships here will be explored using percentage 'working class' and percentage of the population in council houses for measures of income, with unemployment and rates of unemployment change (1971-1981) for measures of social change. (Bearing in mind many other variables could of course be used).

Using the multiple regression package mentioned above, current rates of unemployment and percentage change between 1971 and 1981, only explained 10% and 7% of the variance respectively. In section two we saw that current rates of unemployment are highest in Harehills, University, Chapel Allerton, City and Holbeck, Burmantofts and Richmond Hill. Within these wards only Harehills, the City Centre and Hyde Park (University ward) currently have high vacancy rates. The shopping centre at Chapel Allerton has had low vacancy rates throughout the time periods, possibly a consequence of its location at the periphery of the Chapel Allerton ward, and in fact almost in Moortown. The shopping centres of Burmantofts (York Road and Shaftesbury Corner), perhaps more surprisingly, also record zero vacancy rates for 1979 and 1983, whilst Richmond Hill lacks any centre of any important size. Those centres experiencing the highest percentage change in unemployment between 1971 and 1981 were Beeston, Hunslet, Pudsey, Middleton, Harehills and Chapel Allerton. Of these, again only Beeston and Harehills currently have high vacancy rates.

However, percentage 'working class' and percentage occupancy of council houses explained 30% and 24% of the variance respectively, by far the highest of all the variables used. As fig.2 shows, the high percentage of 'working class' persons in most of the southern and inner northern wards perhaps explains the relatively high correlation.

Whilst the social status of an area may be considered important then, so too is the changing physical environment in which it is set. For example, Hyde Park and Kirkstall Road (see Appendix A), are not only in relatively depressed wards but also have faced a local clientele which has been constantly eroded over time. Population change as a variable explained 22% of the variation, which like all the previous variables, is not statistically significant. Interestingly, McEvoy (1972) reported,

"In both 1966 and 1971 the proportion of centres with above average vacancies is similar in areas of both population growth and population decline." (McEvoy 1972 p.62)

Population change, however, seems to be important for the two centres with the highest vacancy rates, Hyde park and Kirkstall Road. Both areas have undergone substantial slum clearance programmes and hence a considerable loss of population. Hyde Park (University Ward) has experienced a 26% loss of population since 1971 whilst Kirkstall Road has lost 16%. (compared to a Leeds average of only 5% loss). Molt Park shopping centre has also recorded a high vacancy rate in both 1979 and 1983. This seems surprising given Molt Park's location in the relatively prosperous ward of Otley, which has also experienced a gain in population since 1971, and the presence of a large ASDA superstore. However, it seems that the high vacancy levels could be attributed to the small number of outlets, (meaning that a high value emerges when only one or two outlets are vacant), and the extremely poor layout of the centre. The superstore is very much to the fore of the centre with the remaining shops forming a corridor which actually leads to a dead end. Consequently the outlets at the rear of the centre receive very little in the way of pedestrianian 'through flow', and it is these shops which have been hardest to rent.

In terms of statistical significance therefore, many of the conclusions, as in McEvoy (1972), have been negative. However, the overriding conclusion is that finding a global or blanket cause for vacancy rates is not possible, given that each centre is in many ways unique. It is necessary to look at each centre individually.

The great problem with examining vacancy rates however, is that it is a very static measure: that is, they are the result of a recording made at one moment in time. If the researcher had visited a centre a month before or after the day he did, he may find very different rates. Perhaps a better indicator of the health of a centre would be the number of times a shop changes hand, or the turnover of ownership. A rather more brief discussion follows.

#### Turnover of ownership

This is the second 'direct' measure of the health of a particular centre and is defined as, the number of outlets per centre which change hands between the various time periods considered. An immediate problem arises since in the four years between each time period the number of changes in ownership may be more than one. However, that is an unavoidable problem without the immense task of collecting annual or bi-annual data.

Fig.4 shows the levels of turnover per centre between 1971-1975, 1975-1979 and 1979-1983. An immediate glance shows that rates have been fairly uniform although more of a pattern emerges for 1979-1983. The highest rates of turnover for the 1979-1983 period were Hollin Park, Hyde Park, Shaftesbury Corner, Seacroft, Harehills, Kirkstall Road and Beeston Hill. It is interesting to note the high turnover rates in centres such as Hollin Park, Shaftesbury Corner and York Road all of which recorded zero vacancy rates for both 1979 and 1983,



stressing the point made above over the importance of the time of the study. Generally the highest turnover rates are in less affluent areas and again percentage 'working class' accounted for 30% of the variance. Population change accounted for 20% of the variance with the remaining variables each accounting for less than 10%.

However, many of the more affluent wards also contain shopping centres that have relatively high rates of turnover, especially for the 1970s. (see fig.4). This is because a relatively prosperous area is likely to attract the interests of multiple retailers and new kinds of outlets, such as services or quasi-retail activities. (see section 5). This is clearly seen in fig.4 where many of the northern suburbs did have high turnover rates between 1971-1975 and 1975-1979.

Hollin Park is the classic recent example. It has the highest percentage turnover of property between 1979-1983 of all the centres in Leeds. This is not because Hollin Park is in a depressed area: on the contrary, it is relatively affluent. It reflects the recent spread of multiple firms and service outlets into increasingly smaller centres in more affluent areas.

To add to the problem of interpretation here, the lowest rates of turnover between 1979-1983 were Middleton, Dewsbury Road (in Beeston ward), Hunslet and Selby Road (Halton ward), the former three being especially low income areas. It is interesting that Middleton and Selby Road are relatively small centres which have been able to preserve an element of stability, possibly because more family concerns are involved. In fact just under 50% of Middleton's tenants have been present since 1971, a remarkably high figure when one considers that of these, only the Yorkshire Bank could be regarded as a multiple group, which are often more synonymous with stability:- Indeed the stability of outlets in Hunslet could be accrued to the large multiple presence surrounding the Morrisons superstore. (see section 5).

Thus, whilst vacancy rates and turnover rates may offer some insights into the health of a particular centre they can, for the various reasons mentioned above, be rather misleading and more difficult to interpret. It seems each centre needs to be assessed on its own merit rather than trying to find global or blanket explanations.

In order to obtain a better picture of the importance of social status and social change to retail change, it is perhaps worthwhile to look more closely at what is happening on the high street, and in particular the spatial variations which have emerged.

## 5. THE CHANGING NATURE OF RETAILING ACROSS THE CITY.

In this section, comparisons will be made between the various shopping centres in Leeds bearing in mind their current and changing social status. It will be argued that the social geography of a particular area has had a marked impact on the location decisions of major retailers. Thus here, we are concerned with more 'indirect' effects of deprivation and recession on retail structure.

Of all the recent changes in the retail environment one of the most dramatic has been the rapid growth of service outlets (or 'quasi-retail' outlets: see Fernie and Carrick 1982), within shopping centres. This growth however, has been far from uniform across the city, and seems very dependent upon the social status or wealth of the surrounding populations. A brief flavour of these spatial disparities now follows. (For a more detailed analysis, see Clarke 1983.)

Fig.5 plots the rise of the most important service outlet, in terms of numbers, the building society. URPI (1980) put forward three basic reasons to account for recent building society growth and expansion:- a rise in personal income since 1960, the vast programme of building society advertising campaigns and the policy of branch expansion onto the high street. The location policies of each society does of course vary, but two general trends are apparent. The larger firms generally aim for nationwide coverage whilst the smaller societies often favour more localised expansion, aiming for saturation representation in areas of more traditional strength. These two strategies can be seen in Leeds, with major societies such as Abbey National, Nationwide and the Halifax, having a handfull of branches whilst the Leeds Permanent and the Leeds and Holbeck have many.

Whichever of these strategies individual societies favour, there are certain locations within a city which are more attractive in terms of capital investment. Societies clearly look first to areas of high status where there are greater proportions of the population which could afford to take on a mortgage, and/or open a savings account. BRMB (1979) estimated that 70% of building society investors were also home owners and that the relative investment penetration levels were greatly above average in the top two social classes, AB and C1. Fig.6 shows the distribution of the population that own their own home and those which rent from the council. Not surprisingly, given the social geography outlined in section 2, the wards of highest rates of owner-occupation are those to the north.

It can be seen from fig.5 and a comparison of figs.5 and 6, that the larger centres, with their larger pedestrian flows, and the more affluent northern suburbs, with their greater rates of owner-occupation, have indeed been more attractive to building societys. This is reflected by a large number of branches in areas such as Horsforth, Harehills, Pudsey, Crossgates, Oakwood and Headingley: by 1983 Horsforth had acquired nine different societies and Crossgates had acquired eight. In stark contrast, areas such as Hyde Park, Kirkstall Road and Beeston Hill have yet to acquire a branch of any society.

The suburban branch location policy of the Leeds Permanent and Leeds and Holbeck however, has meant many smaller, less affluent centres have gained a building society branch, the kinds of centres which elsewhere in the country have been less successful. This is particularly important in Leeds and it is worth quoting the General Manager of the Leeds and Holbeck (Woolin 1983), who 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 base."

The effects of this policy can be clearly seen in fig.7:- it has brought the building society to areas such as Middleton, Beeston Hill, Woodsley Road, York Road and Bramley, which have not attracted any other societies.

Apart from building societies other services have been active too. The expansion of estate agent branches very much mirrors that of building societies, see Clarke 1983, and indeed often provides the outlet for the building society.

Fig.8 plots the rapid suburban rise of travel agent branches during the 1970s as the 'package holiday' has become so popular. Once again, we can see how selective companies have been in locating their stores. The high status northern areas have clearly been most attractive and only Hunslet of the southern wards has a branch. Similarly, the distribution of film processors in 1983 is plotted in fig.9, this being the most recent high street service phenomenon. Again the larger and more affluent suburban centres have been favoured.

Clearly then, the location of a particular centre, in respect to the affluence of the surrounding population, plays a vital role in its ability to attract service outlets. Moortown to the north for example, currently has over half its outlets in the form of services whilst Horsforth and Roundhay are not too far behind. Conversley, Middleton has only 26% of its outlets as services whilst Woodsley Road records 19% and Hyde Park only 18%.

The question which now arises is, what is happening outside the more affluent northern suburbs? First, as we have already seen, there tends to be a greater degree of stability and traditionalism, especially in centres such as Middleton, Dewsbury Road and Selby Road. Elsewhere too, many of the more traditional retail trades are still important. For example, fig.10 plots the decline of the once common grocers shop since 1961. (1961 is used here to give a better flavour of change). From a widespread distribution in 1961 amongst the shopping centres of Leeds, a far

more concentrated pattern has emerged especially within the inner wards and those to the south and east. Similarly, many of these centres also manage to retain a greater number of other more traditional functions such as fruit and vegetables, hardware, menswear and fishmongers. (for more detail see Clarke and Macgill 1983)

However, it was also seen above that the rates of turnover of ownership have generally been relatively high in most of the southern and eastern centres: thus what kinds of changes have been taking place? One outcome of economic recession seems to have been a growing number of shops dealing in 'fancy goods' or 'discount/second-hand goods', perhaps more commonly referred to as 'junk shops'. Fig.11 plots the growing number of these kinds of outlets. It is interesting that their distribution has not changed greatly over time, although more recently there has been a growing number in centres such as Harehills, Armley, Hyde Park, Kirkstall Road and Pudsey. Parts of the city centre (not shown in fig.11) have also experienced a large increase in these kinds of outlets. For example, Boar Lane and the surrounding areas (see Appendix C), which were referred to earlier as 'fringe' rather than 'core' shopping areas today, are now littered with junk or second-hand shops, making use of the availability of much shorter leases.

Included in the definition of discount stores is the ever-increasing phenomenon of the discount supermarket. In terms of nationwide growth, 'Kwik Save' has been the most important in this field although very few outlets exist in Leeds, where independent operators are far more common. Generally these are low-cost stores making profits from selling directly out of boxes, rather than fancy packaging. As they are supermarkets, they still require a considerable pedestrian flow and thus tend to favour the larger but less affluent centres. Armley for example, falls into such a category. Already possessing a 'Kwik Save' store, it has recently seen its Tesco store move down-market in a deliberate policy by the company to provide cheaper goods in less affluent areas. RDM (1983) reported in its commentary section,

"In all probability we will also see emerging a different sort of retail outlet which will cater specifically for the needs of the less-privileged and this is likely to be in the form of a stripped-down, limited range discount store. So far only Tescos with their six value stores in the North-West and Merseyside have started such a chain. But as David Malpas (Tesco company) said, 'the reality is that in areas where unemployment is running at 20% the wife of an unemployed man living on thirty-six pounds a week is not interested in the frills of retailing. To her, refinements are irrelevant.' " (RDM (1983) p.7)

Thus in Armley, Tescos have replaced their traditional lines of merchandise with many cut-price own labels or plain white labels which carry no brand name. They have also re-named the store 'Victor Value'.

In more general terms it is interesting that RDM (1983) go on to report that the large firm will undoubtedly, "as a result of economic and social change, market and merchandise policies to reflect the economic conditions in which individual units operate."

The emphasis so far in the paper has been on the differing fortunes of the more affluent northern suburbs as opposed to the centres in the more depressed southern and eastern wards. However not all of the centres in the latter group have been affected in the same way. One of the most positive ventures concerning retailing in Leeds, has been the alliance between the Leeds Planning authorities and a regional superstore operator, W.Morrison Ltd. The aim has been simple yet effective:- to provide the facility of a superstore within a planned shopping centre. This has often re-vitalised retailing in very depressed areas. For example, Hunslet, with a very high rate of unemployment in 1983, and Bramley, in an area currently experiencing one of the highest rates of unemployment increase, have both benefited from the arrival of Morrisons. The advantage to Morrisons of these areas is very cheap sites with a sizeable, if not affluent, local clientele.

The arrival of the superstore has brought a great deal of stability to retailing in Hunslet and Bramley, and hence correspondingly low vacancy and turnover of ownership rates, with a high proportion of multiple firms eager to take root near the superstore magnet. The relative success of these centres seems to vindicate the policy of Leeds City Planning Authority of not allowing free-standing superstores or hypermarkets, all developments being forced to incorporate other outlets in the form of a district centre. It is also of interest to note that Prestos have recently undertaken the construction of a superstore within a new district centre at Middleton, another area which has suffered greatly through the recession.

Thus the superstore, combined within a district centre, has been extremely important in revitalising retailing in less affluent areas of Leeds, which, if other similar schemes could be set up elsewhere, begins to hit back at the argument against the superstore being only available to the rich, car owning population.

Other centres have responded quite differently to change over the last ten years: for example, Stanningley and Shaftesbury. (the author's own name for a small centre on Harehills Lane [which has a larger centre] surrounding the former Shaftesbury Cinema). As above, Stanningley lies in an area of the highest unemployment growth, whilst Shaftesbury lies in the Burmantofts ward which currently has a high rate of unemployment. In 1971 both centres were very ordinary in that they offered the typical range of goods including grocers, fruit and vegetables, hardware, sweets and tobacco etc. As the 1970s unfolded both centres have been hit by a reduction in local spending power and increasing competition from nearby larger centres.

Faced with this background both centres have become somewhat specialist centres, offering a range of goods not easily found elsewhere in the city. (And hence drawing on a wider catchment area). Shaftesbury for example, now boasts a large gas appliance store, an accessory shop for 'CB' radio equipment, a golf

equipment store, a tile and floor centre and a bed and bedding shop. Stanningley also has obtained a 'CB' radio equipment store, a so-called 'wood-care' outlet (dealing in preservatives) and numerous second-hand and antique furniture stores. Clarke and Macgill (1983) show how these centres, and several others, are very distinctive in terms of the number of functions that are unique to themselves.

Similarly, many outlets in the Chapel Allerton Ward have undergone dramatic change as the social and ethnic character of the area has itself changed. With the influx of a large Asian and West Indian community, many of the shops, not sufficiently clustered or continuous to be labelled as one centre, have become Asian specialist and food stores.

#### CONCLUSION

This paper has been concerned with the changing retail structure within Leeds in light of the changing social geography, and with particular reference to the recent recession. Although many of the changes cannot be isolated from other aspects of urban dynamics, it is clear that the degree of affluence/deprivation of an area, especially as it is perceived by retailers themselves, has had a marked impact on how shopping centres change over time.

It has been argued that whilst measures such as vacancy rates and turnover of ownership provide useful indicators of the current health of a particular centre they can be misleading. It seems more useful to examine what is happening on the high street itself and the spatial variations which arise.

#### Acknowledgements

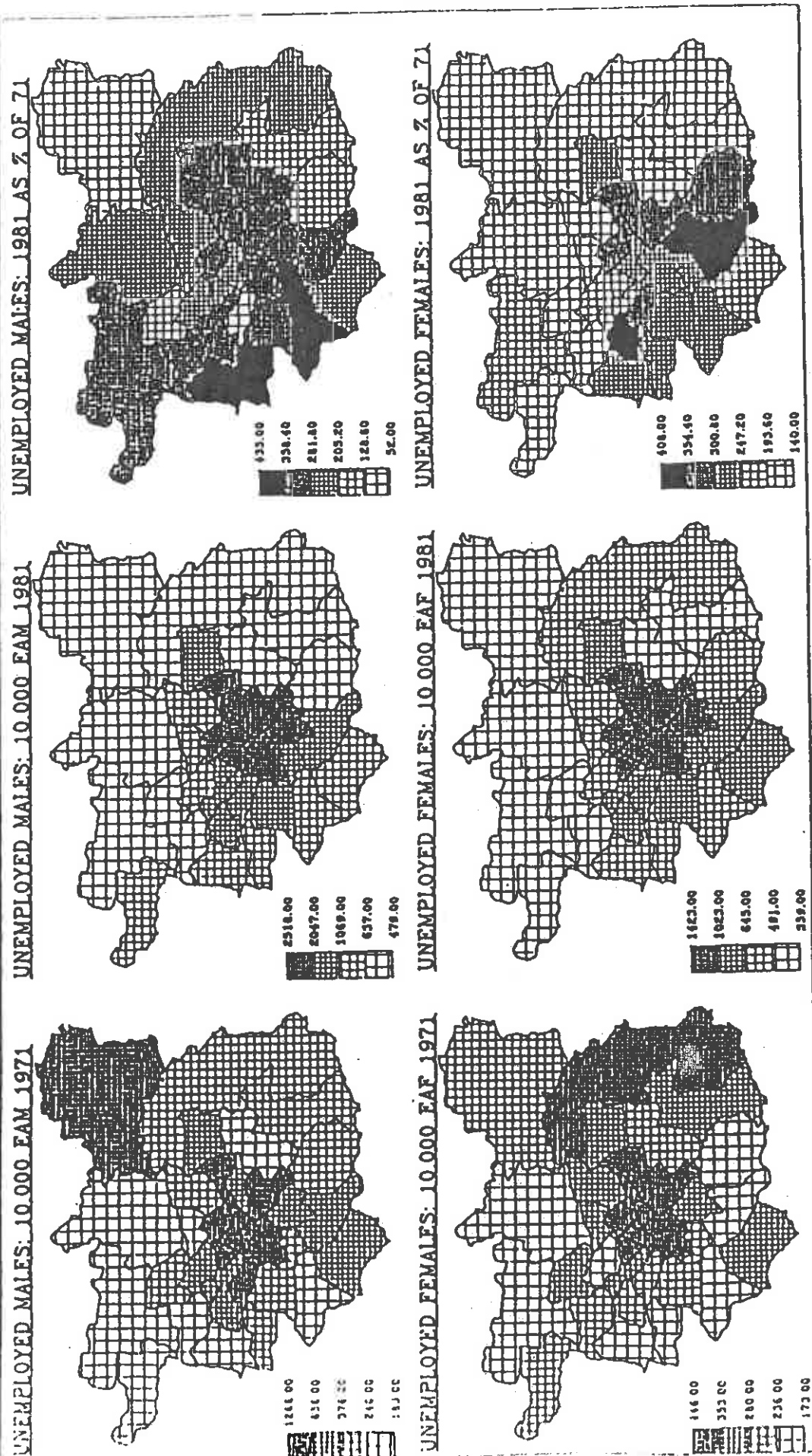
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Source: A. Hirschfield (1984)

Figure 1. Male and female unemployment rates per ten thousand of the population

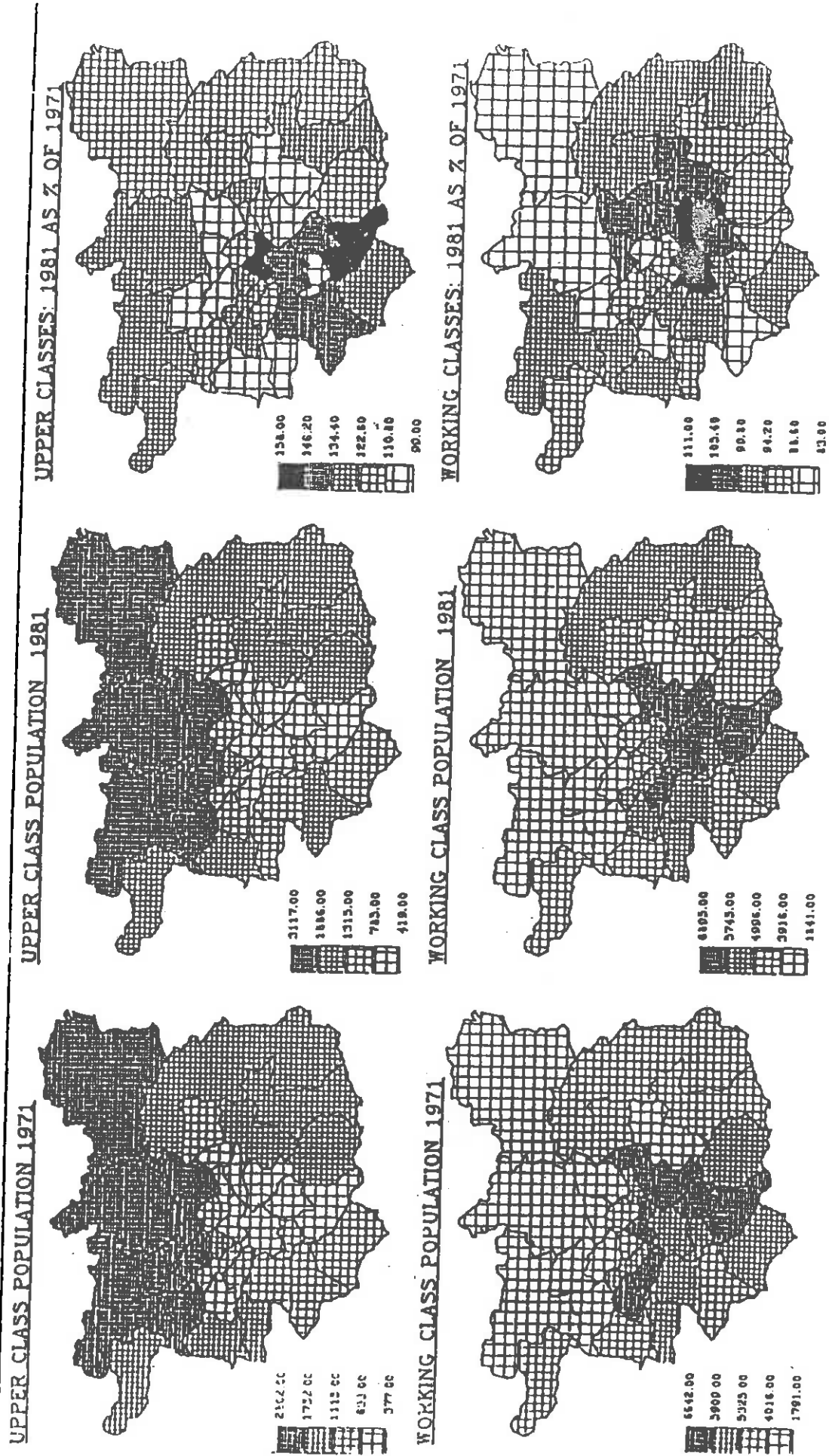
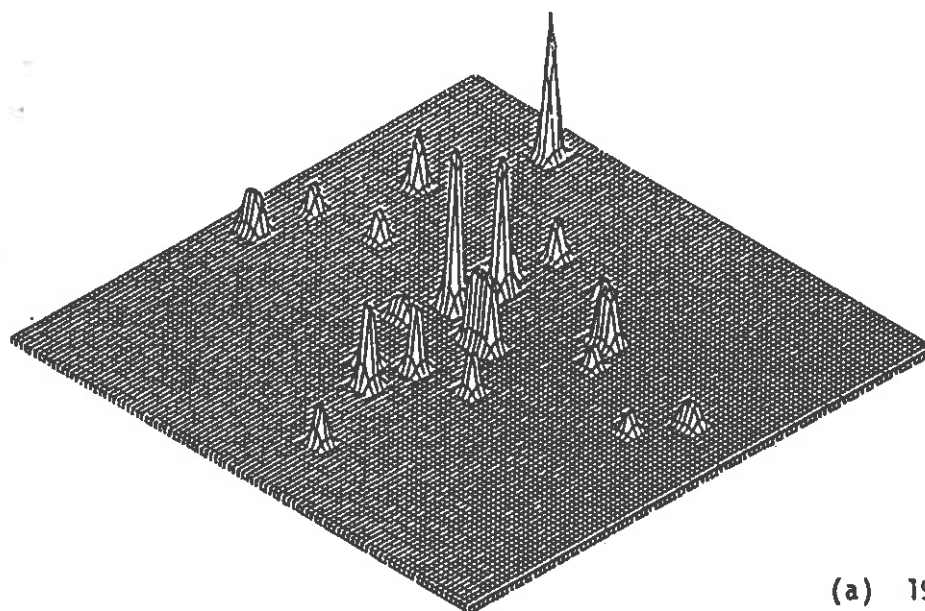
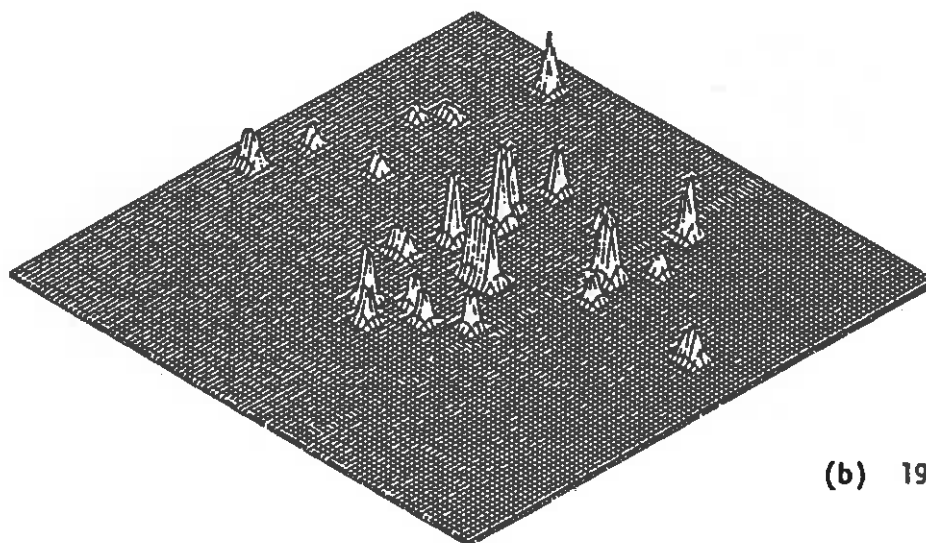


Figure 2. 'Upper class' and 'working class' ratios per ten thousand of the population

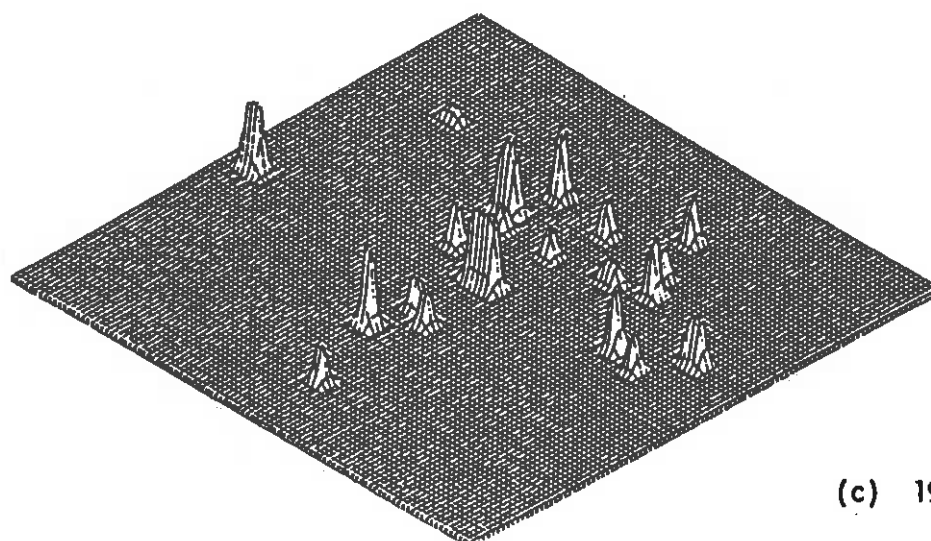
Source: A. Hirschfield (1984)



(a) 1983

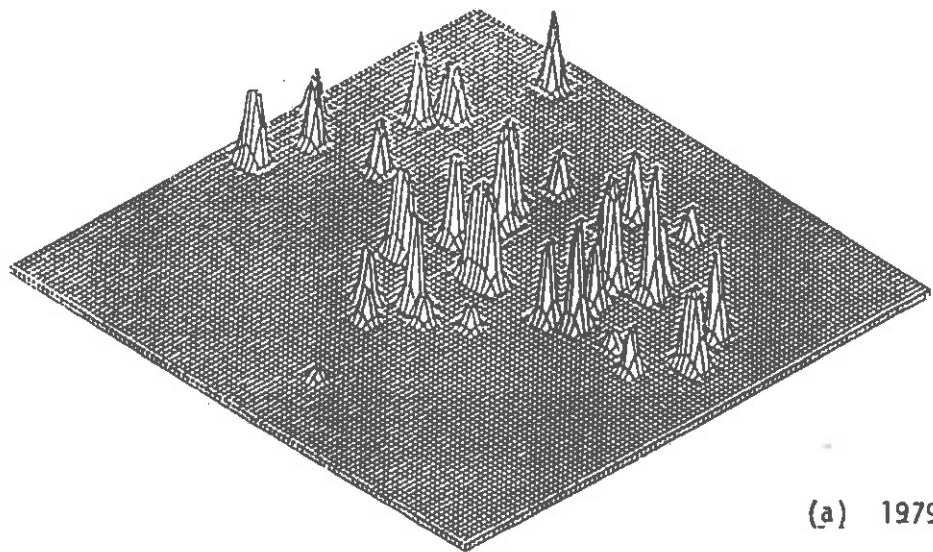


(b) 1979

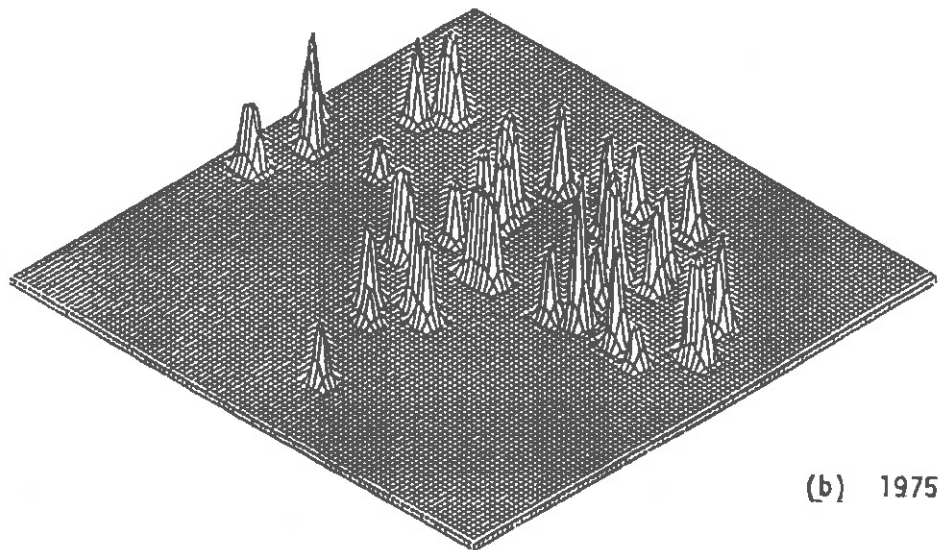


(c) 1971

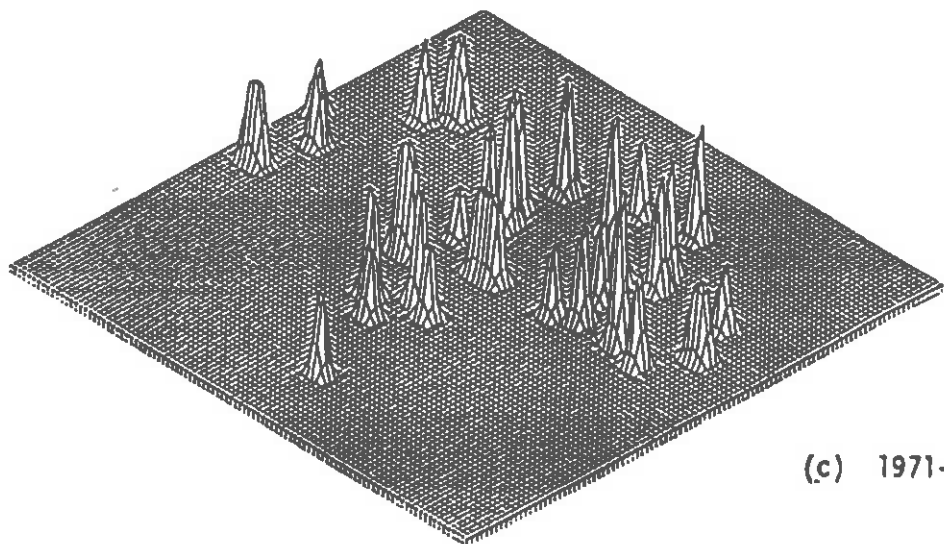
Figure 3. Vacant properties as a percentage of the total number of outlets



(a) 1979-1983



(b) 1975-1979



(c) 1971-1975

Figure 4. Turnover rates of retail outlets

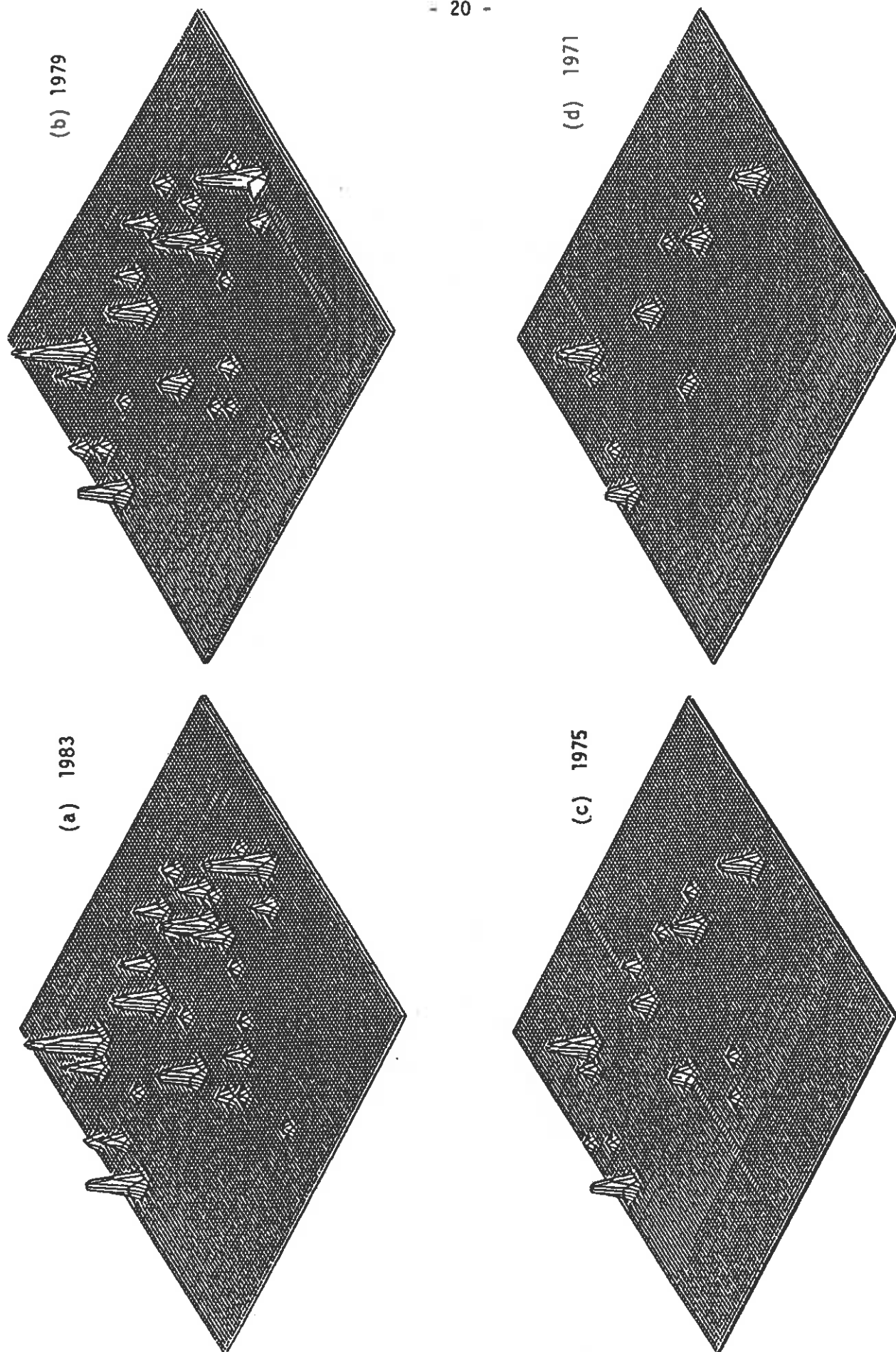


Figure 5. The suburban growth of building society branches

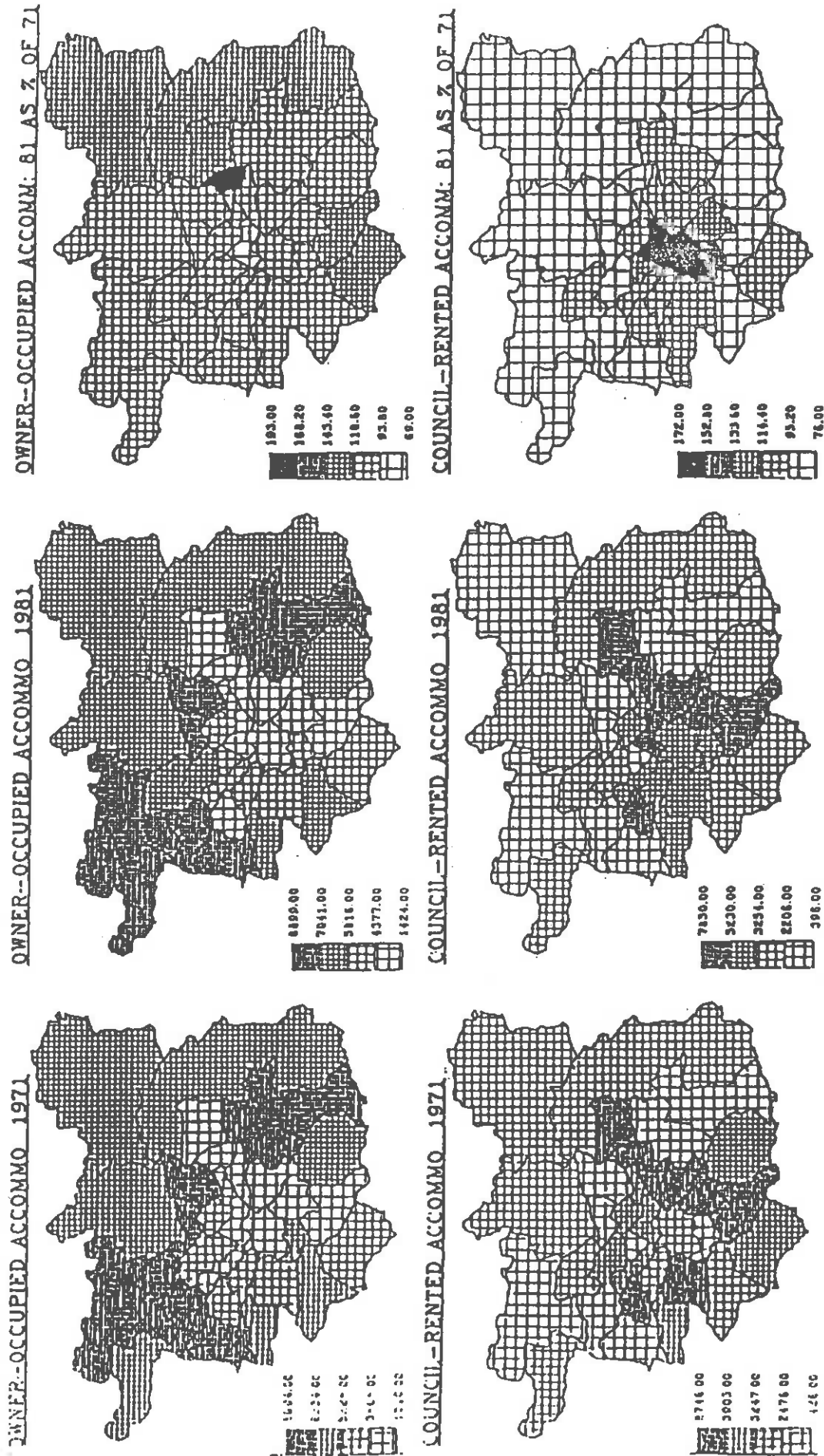


Figure 6. Levels of owner-occupation and council-rented accommodation per ten thousand of the population

Source: A. Hirschfield (1984)



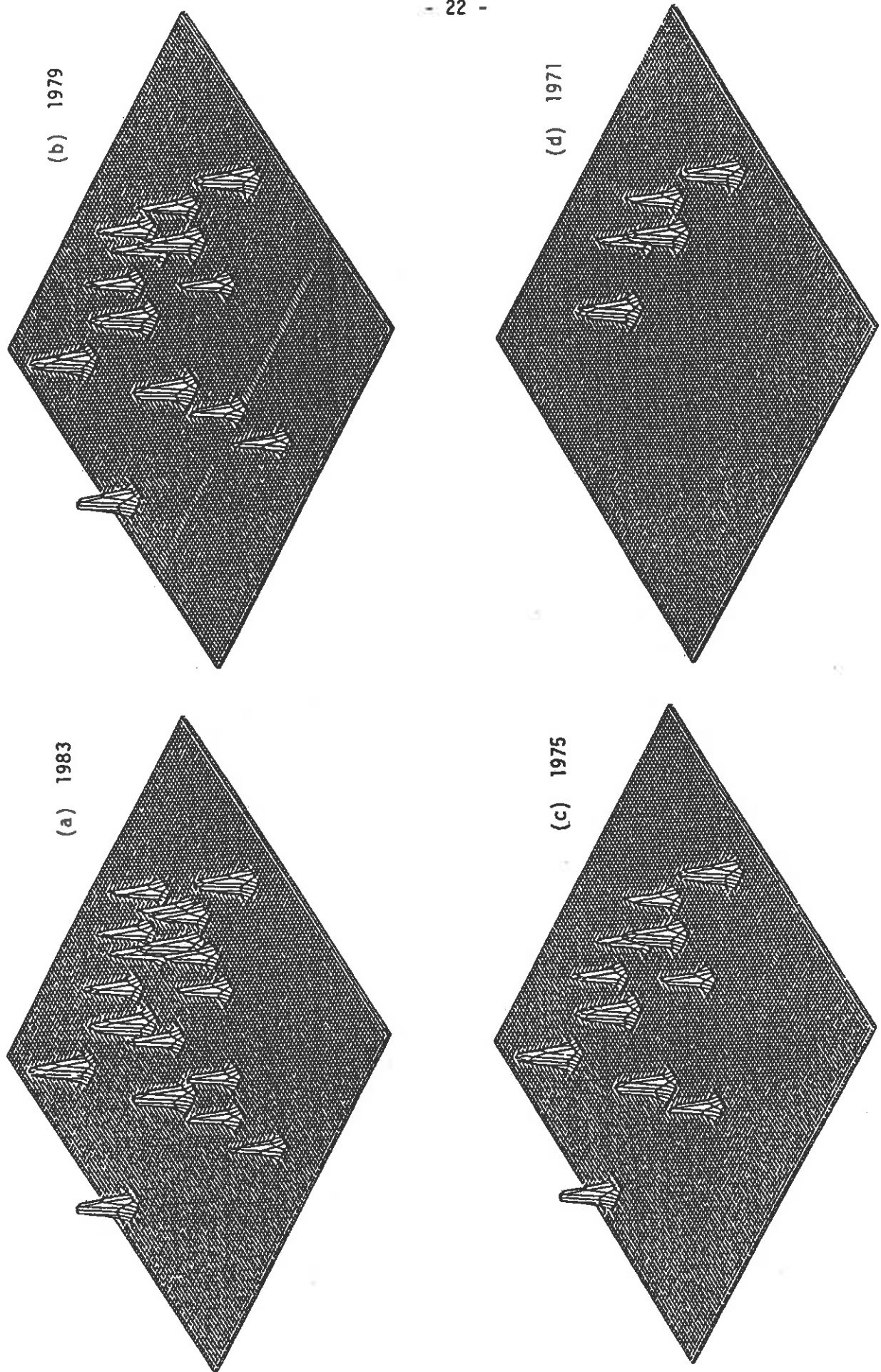


Figure 7. The suburban growth of the Leeds and Holbeck Building Society

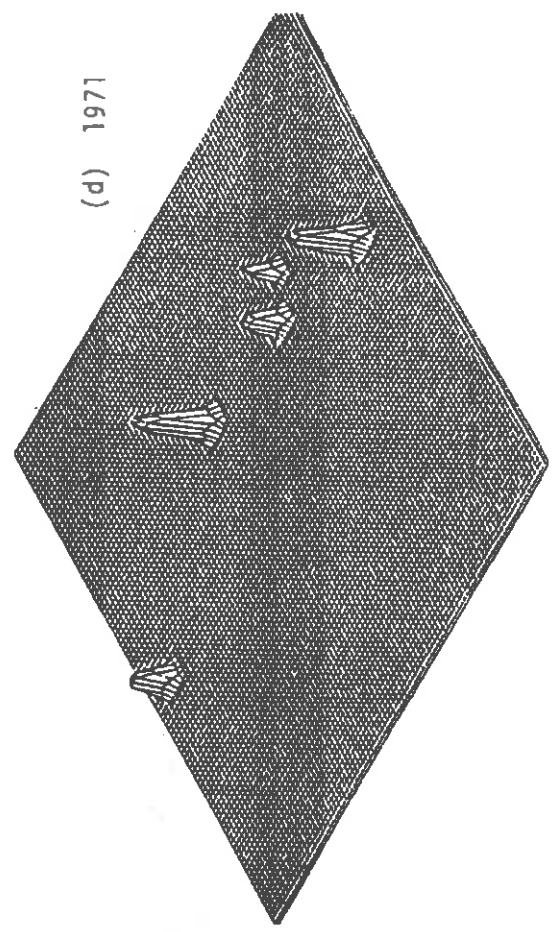
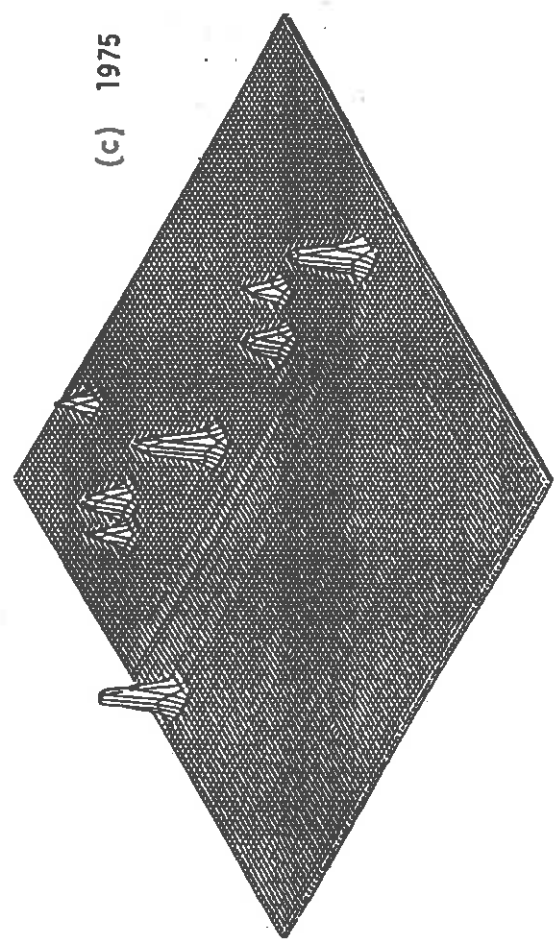
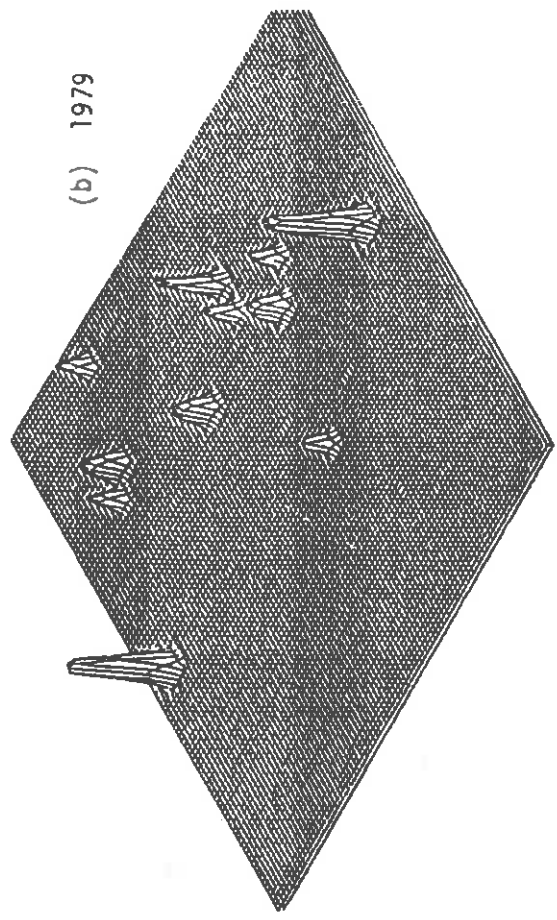
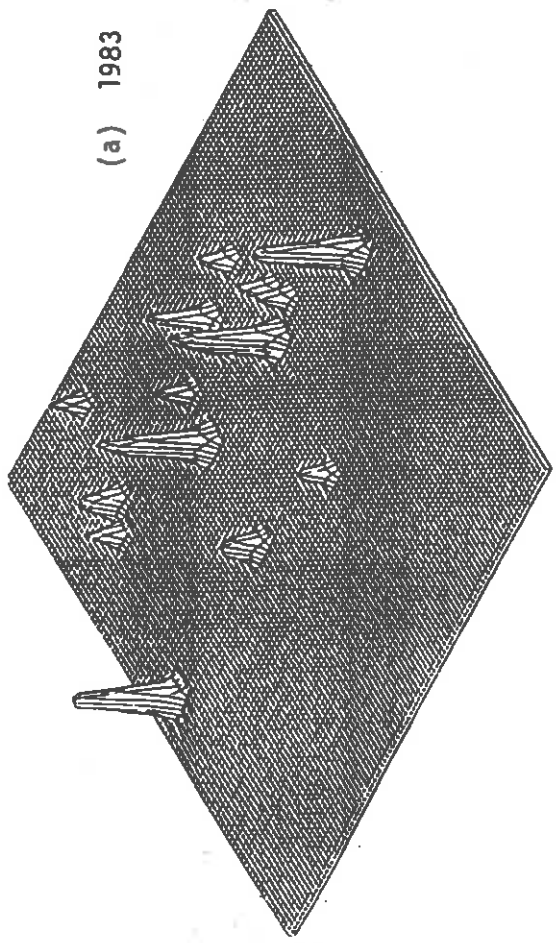


Figure 8. The suburban growth of travel agents



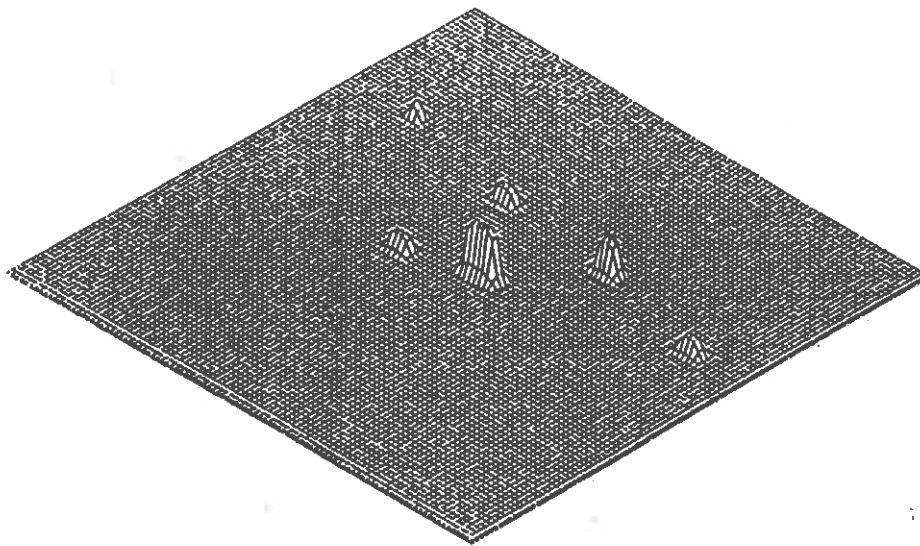
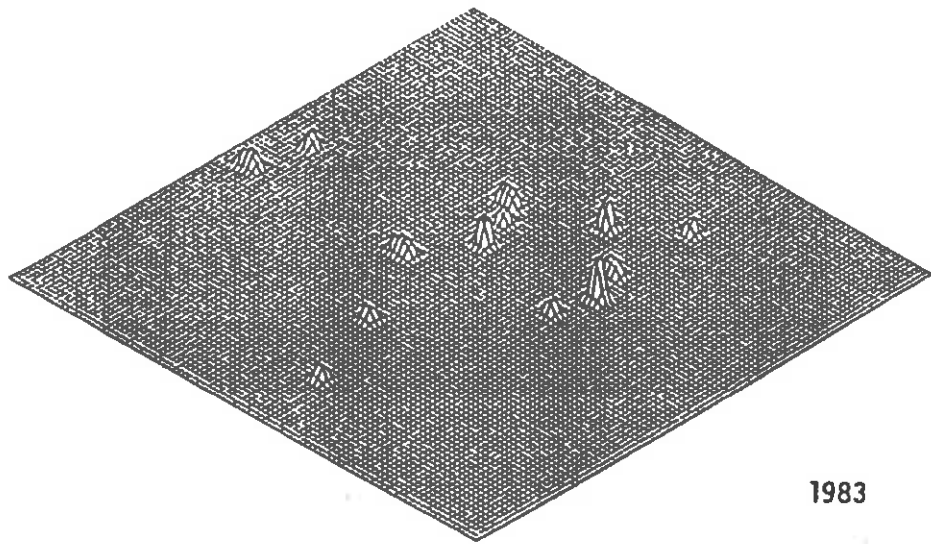
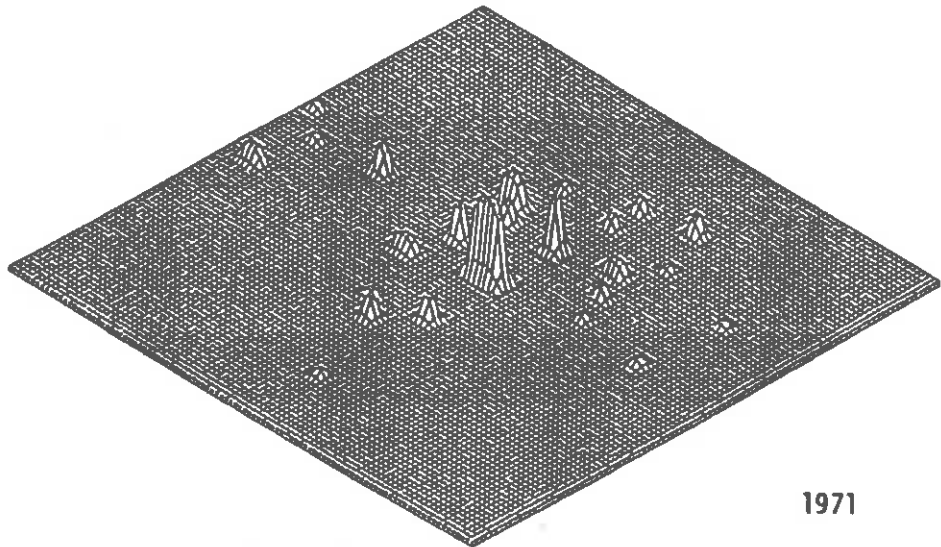


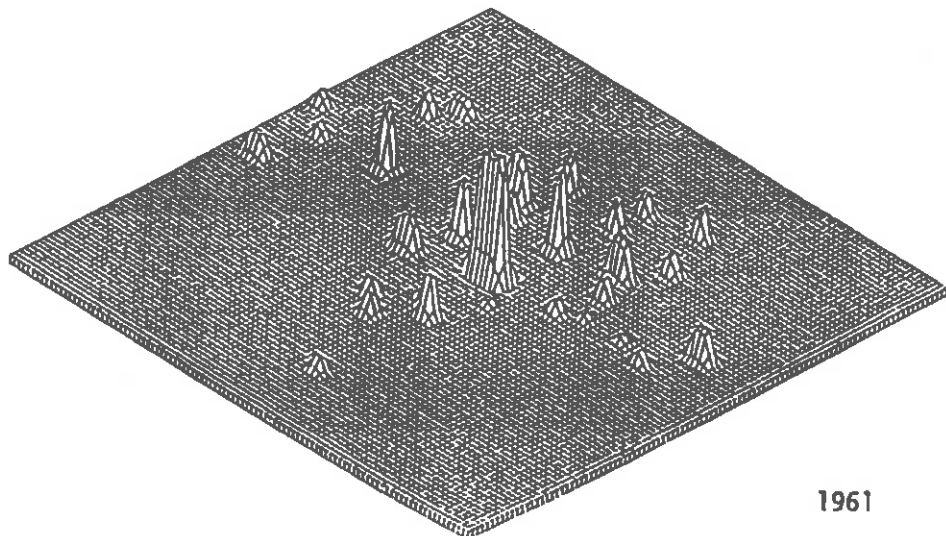
Figure 9.    The distribution of film processors in 1983



1983



1971



1961

Figure 10.    The decline in the number of traditional grocers 1961-1982

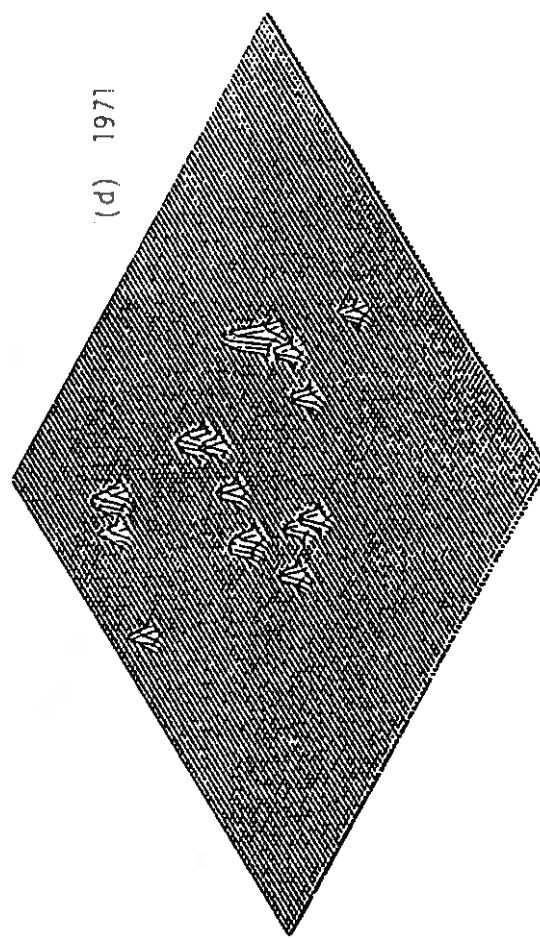
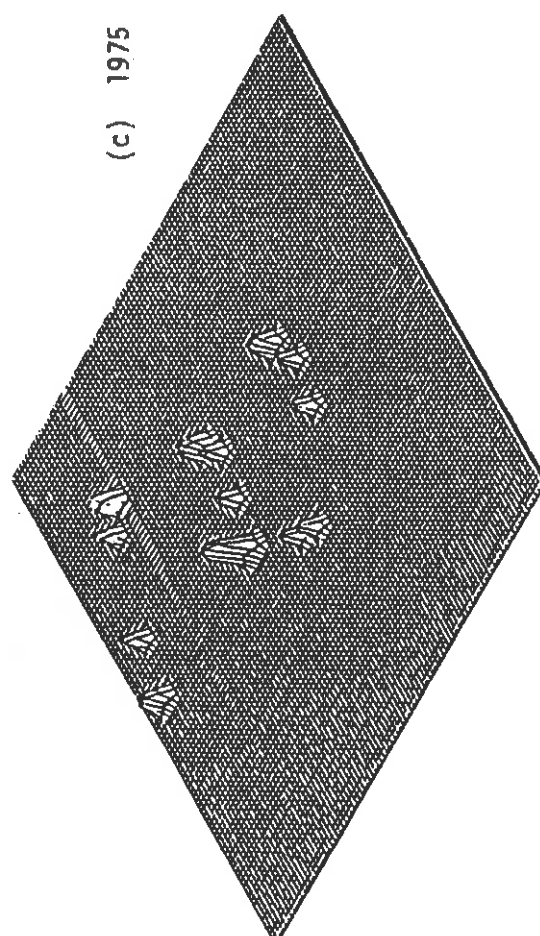
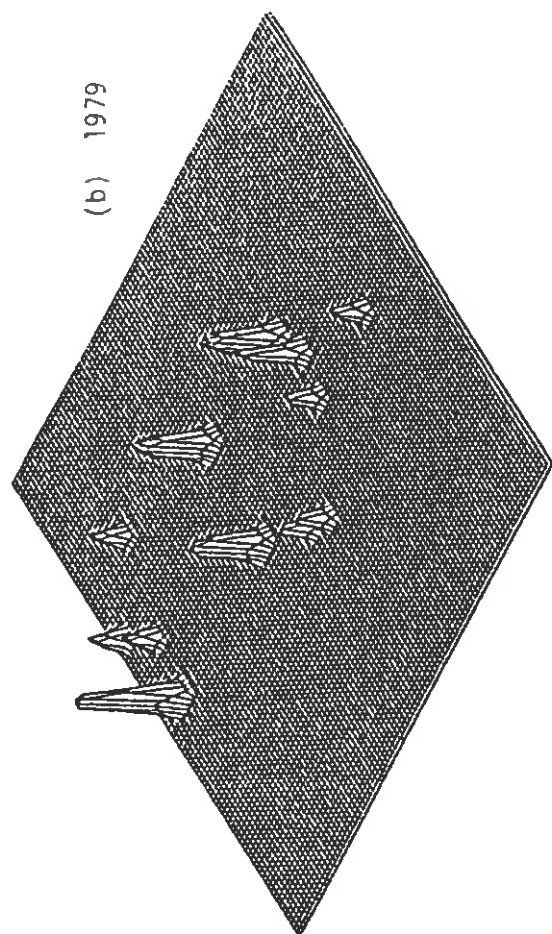
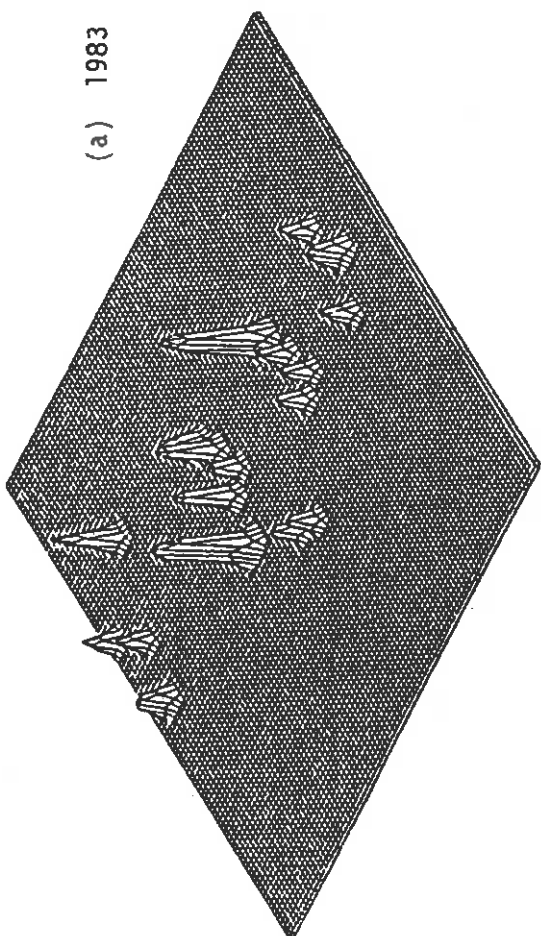
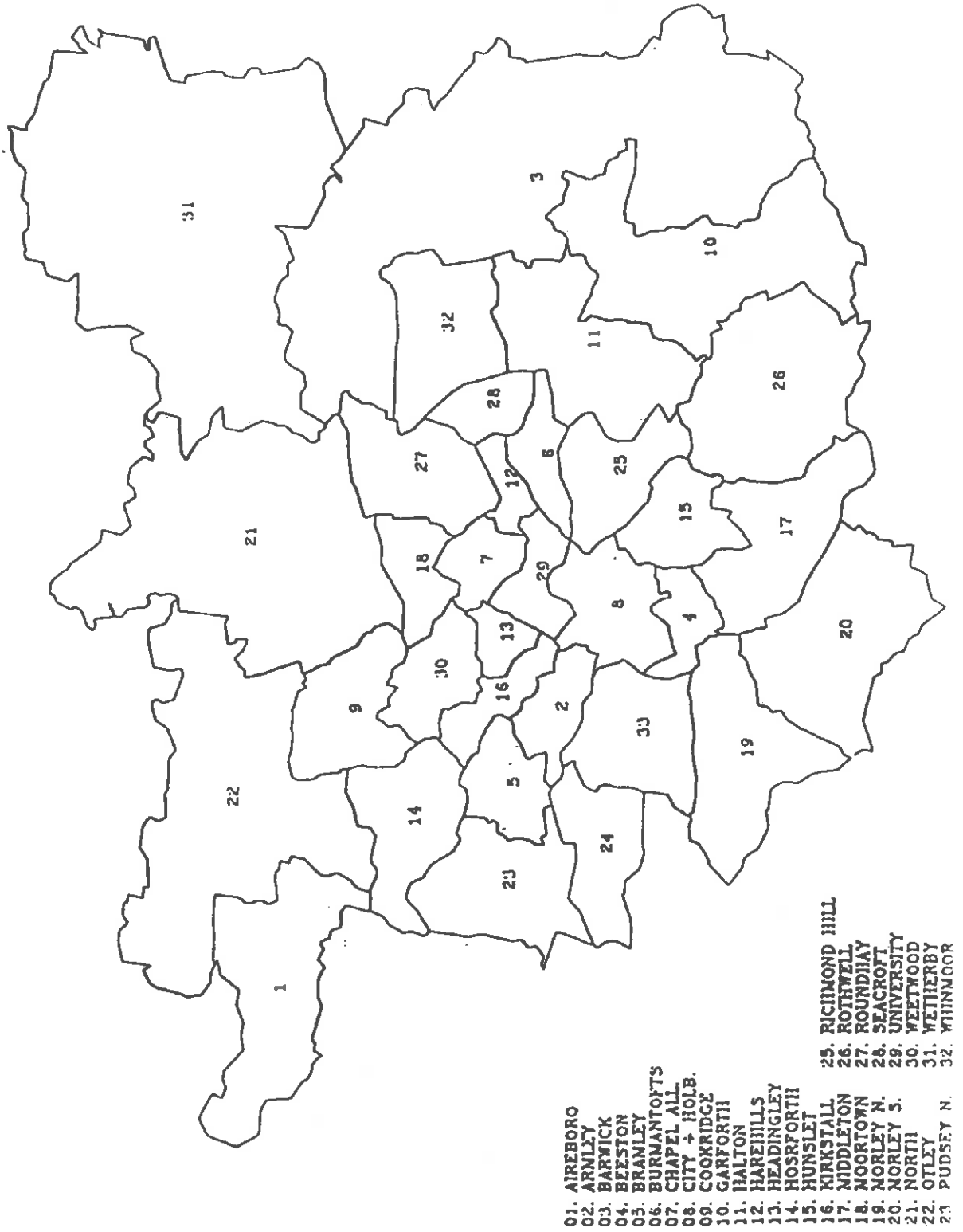


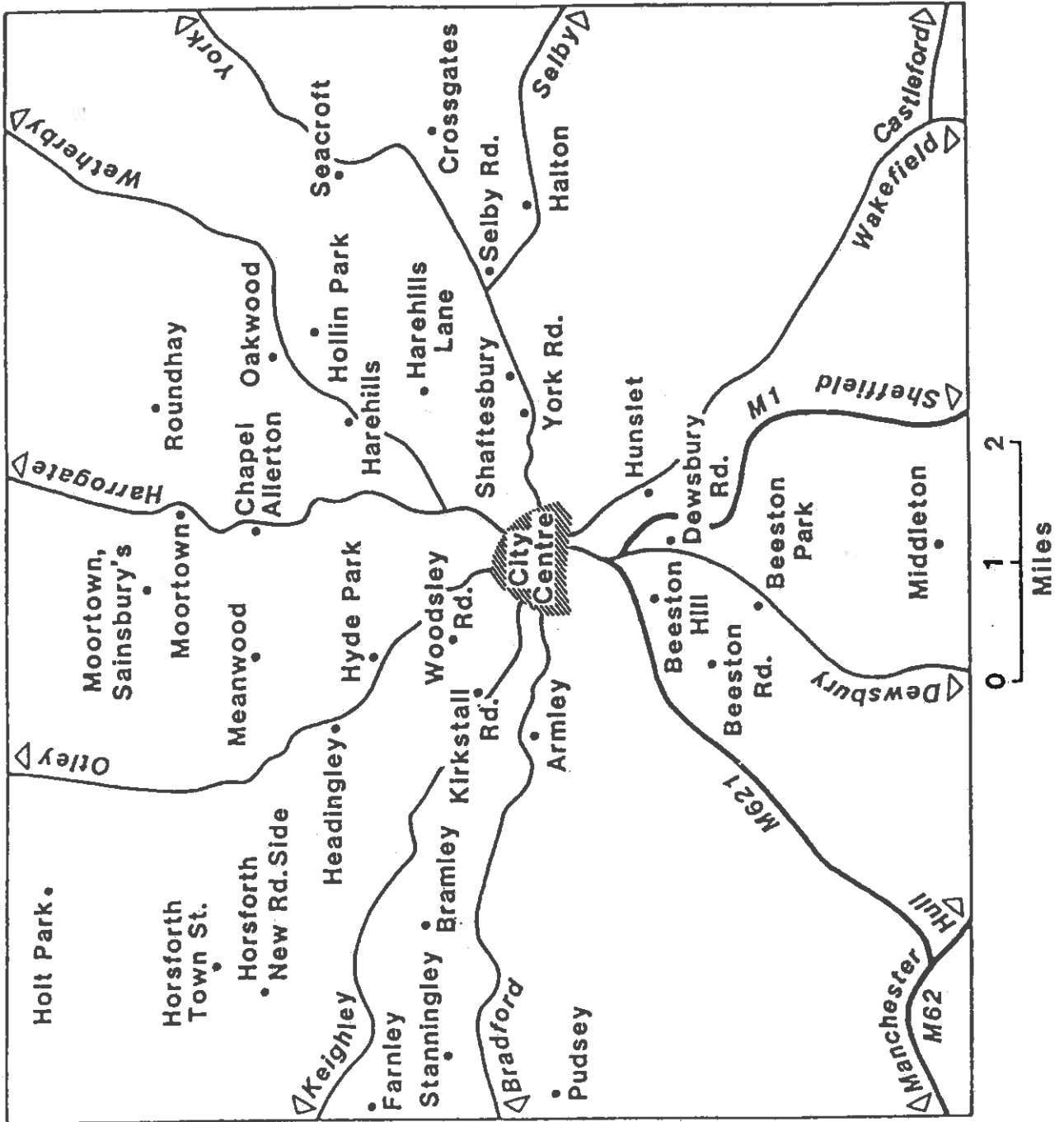
Figure 11. The changing distribution of 'fancy goods' and 'junk' shops

Appendix A

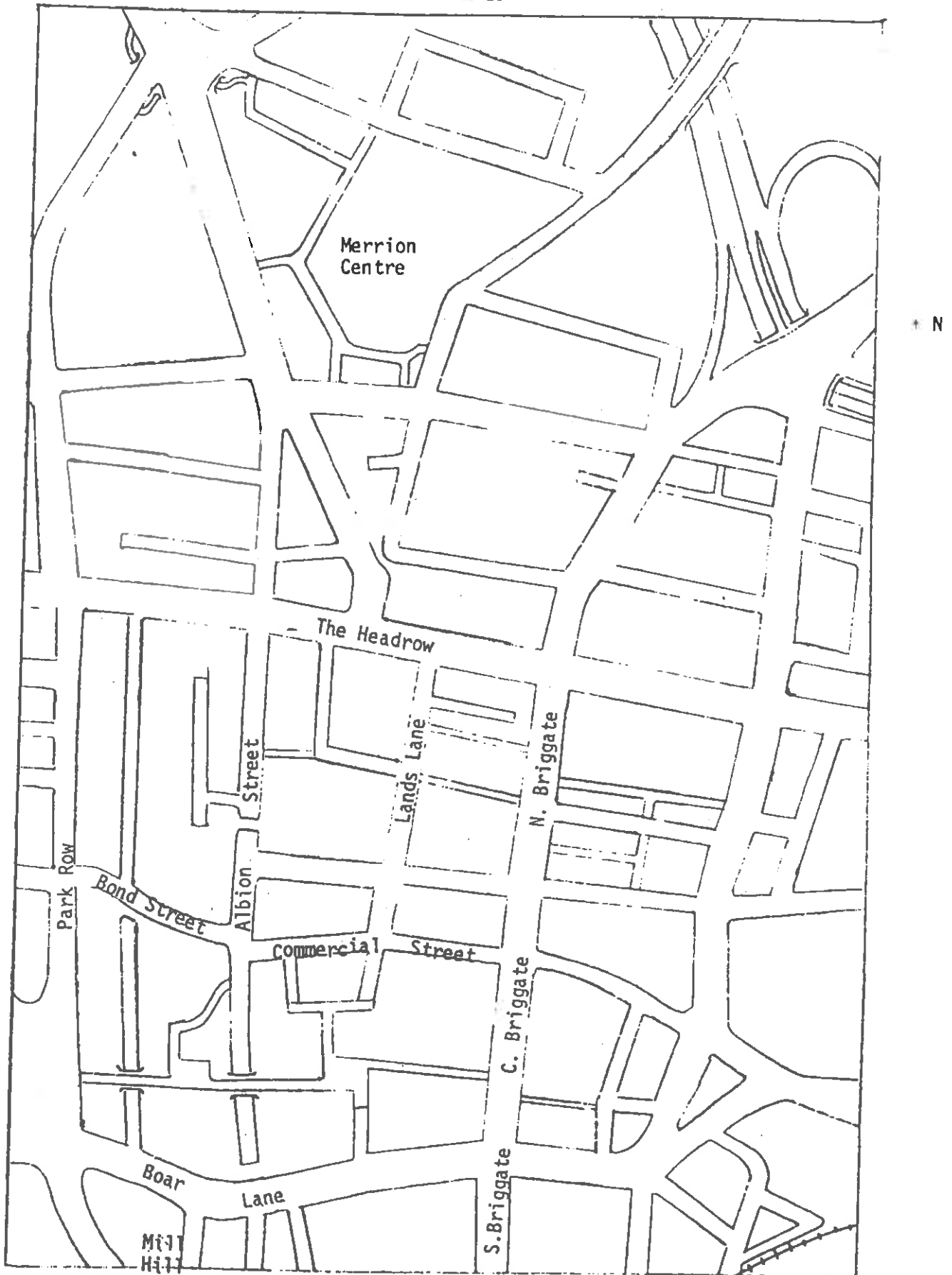
Map to show the nomenclature of  
Leeds wards at 1981 census

from A. Hirschfield (1984)





Appendix B. The shopping centres of Leeds



Appendix C. The retail heart of Leeds City

