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THE CHANGING EXPRESSION OF SMALL-SCALE RETAILING IN THE CITY, 1955-1983

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INTRODUCTION

The aim of this paper is to explore retail change in a section of North Leeds between 1955 and 1983 with particular attention focussing on the fortunes of the local or small shop. By concentrating on this sector of the retail environment of Leeds it is intended to complement earlier research which has primarily focussed on changes within and between the principal shopping centres of the city (eg. Clarke 1984a, b, c and Clarke and Macgill, 1984). Whilst much has been written on the problems facing the small shop, few detailed studies have been explicitly attempted. Indeed Kirby (1974) notes, in connection with the growth of larger stores

"The corollary to larger stores is usually a decline in the number of outlets, and although retailers are convinced that a massive reduction in their numbers is taking place, there have been no detailed studies of the rate at which change is occurring. Similarly, even if numbers are declining rapidly, it is not known whether all trades are affected, whether the decline is restricted to small grocery outlets, ... The reasons for this dearth of information are numerous but one of major importance has been the lack of reliable data on which empirical studies could be based." (p.15).

In terms of particular trades, it should be noted that a number of national studies are available, but these are very restricted in both their nature and content. (Yet see for example Anon (1977) for chemists, Thorpe (1977) for toys, and various URPI studies for individual goods, ie. URPI 1980a, 1980b). For local shopping overall, Guy (1983) has recently examined methods of assessing access to changing local shopping, opportunities in his study area of Reading. However, the dynamics involved cover only the period 1976 to 1980.

In this paper detailed information concerning small-scale retailing will be examined for a section of North Leeds, with particular attention focussing on changes in both the numbers and types of outlets.

DEFINITIONS AND DATA

For the purposes of this paper two different base years will be considered, namely 1955 and 1983. This reflects the belief that some of the most dramatic events have occurred in retailing over the last twenty to thirty years and the concern to approach the question of how the small shop has been affected by these changes. It had been hoped to capture the dynamics of change in more detail using 1971 as a third time base (a retail survey conducted by the Leeds Planning Department). However after a detailed investigation, there was felt to be too many areas of uncertainty connected with the completeness of this particular survey. Thus, in order to avoid making false assertions through incomplete data the planning survey has not been used here.

Whilst it seems intuitively easy to picture, many authors have had problems in defining what is a small shop. Dawson and Kirby (1979) finally settle for the following

"A small shop in Britain is a retail establishment of any form of organization (but most commonly independently owned) with an annual sales figure of less than approximately £100,000 (late 1970s prices) (£50,000 in 1971) and having fewer than ten employees. They may be located anywhere but are usually not in prime city centre sites or in major shopping centre developments. Small shops are typified by a mix of common operational and economic processes and are faced by a common set of problems." (p.3).

For our purposes we will be examining all shops, whatever the form of organization, outside the major shopping centres within our study area (see introduction for references concerning change within these centres). The vast majority of these conform to Dawson and Kirby's definition of a small shop. The obvious exceptions are the co-operative supermarkets and more recently a superstore on the Leeds Ring Road. However, to give further insight into the kind of stores we are primarily concerned with here and to help conjure a better visual image it is worth quoting Sibley (1975)

"The small shop in the city is characteristically associated with high frequency and short distance trips. Particularly in the older and poorer areas of the city, the small size and spacing of shops is related to pedestrian movement and the inability of a household to store goods in large quantities, making frequent trips necessary. However, since it is often located within walking distance of home, the small shop has the virtue of being convenient for all consumers because patronage does not depend on the availability of a car or public transport, and the limitations that it can only offer a restricted range of goods." (p.3).

Data for looking at change in Leeds comes from two sources. Analysis of the pattern of small shops in 1955 derives directly from a study undertaken in that year by Frank Leeming (please refer to 'Acknowledgements') written up in Leeming (1959). In this study Leeming compiled a complete inventory of retail facilities in a section of North Leeds:

"During the summer of 1955, a detailed house-to-house survey was made in a northern segment of Leeds of the distribution of each of 129 categories of retail shopping and service facilities. The schedule of categories used was based on that adopted in the Board of Trade Census of Distribution of 1950; but large and fundamental modifications were made in the schedule while the scope of the Leeds survey was much wider than that of the Census." (Leeming, 1959, p.134).

The present author in the summer of 1983 completed the same house-to-house survey. The major item or function offered at each outlet was recorded as Leeming had. However, in his study Leeming also counted all occurrences of facilities offered within a particular shop rather than simply the main item. More recently Dawson (1982, p.116) has also emphasised the growing importance of what is commonly termed 'scrambled merchandizing'. The main item or function has only been considered here however both to speed up the process of data accumulation and to simplify the interpretation of that data. Although it is acknowledged that some detail has been lost it is still held that the extensive nature of both of these surveys provides an excellent opportunity for a detailed examination of change across a section of the city.

Figure 1 shows the area under consideration. As the map shows, the study area comprises a large section of North Leeds primarily between the main Otley and Harrogate Roads, and covers a region between the city centre and the northernmost suburbs. Within such an extensive region there is great social diversification, providing in turn very different retailing environments.

"The area was chosen for the experiment in full awareness of this high degree of physical fragmentation and social diversity. Its character has probably given rise (as was expected) to many interesting points in the results; but a greater degree of regularity in results might have been achieved in a less complex area." (Leeming, 1959, p.138).

THE CHANGING SMALL-SCALE RETAILING SECTOR OF NORTH LEEDS

In his paper, Leeming identified an inner and outer area of North Leeds where the patterns of retailing were very different (Leeming 1959, p.138 onwards). The inner area was characterised by densely packed terraced housing and large numbers of shops whereas the outer area was less densely housed and shopped. Similar conclusions were reported in other studies too. (eg. Parker for Liverpool, 1962). Thirty years on it seems possible, with the benefit of hindsight, to identify three core areas for this study. These three areas are marked on Figure 1 (as i, ii, iii). Area (i) has experienced rapid shop-loss between our two base years; Area (ii) has enjoyed a certain degree of stability in terms of shop numbers whilst Area (iii), the most northerly section, has actually seen an increase in the number of small shops.

Within Area (ii) there are currently (as in 1955) four main shopping centres, Headingley, Chapel Allerton, Meanwood and Hyde Park Corner (the latter relatively small compared to the other three). This very much reflects the first suburban 'ring' of retail facilities. In order to concentrate on the small shop environment, change within these four centres has been discussed elsewhere and the interested reader is referred to Clarke and Macgill (1984) for general functional and hierarchical change, and Clarke (1984a, 1984b) for service and 'multiples' penetration levels. It is appreciated that omitting these centres here does weaken the direct comparison with Leeming's original study. (Leeming 1984).

Area (i) : Decline

Area (i), shown in Figure 1, is of course the classic inner city area which has, since 1955, lost an increasing share of its population and has been subject to major re-developments. The area in 1955 was characterised by very dense housing, predominently terraced, with a high number of 'back-to-backs'. Groups of these terraces would often have similar street names, coining local expressions, such as the 'Brudenells', the 'Mexboroughs', etc. (see Figure 1). Within the whole of this area in 1955 Leeming (1959) notes

> "The most important area singled out in these districts is the zone lying along the main thoroughfare from Hyde Park Corner through Sheepscar to North Street. This zone contains four of the seven largest groups *1 in the whole segment *2 and consists of a nearly continuous belt of shops more than one and a half miles long." (p.146).

The continuous belts of shops which Leeming refers to were common throughout the area in 1955, many being strung-out in classic 'ribbon' fashion. That is, the major streets leading to and from the city centre and the major east-west connections, were lined with long runs of shops. Davies (1974) notes

> "For the most part, ribbons in British cities constitute the oldest and most blighted retail configurations to be found, and they reflect mainly on a former uncontrolled marketing response to public transport staging points with only relatively little recent adaption to the needs of consumers using private vehicles." (p.94).

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*1 Small clusters of shops

*2 ie. the inner city area

In between these major routeways were the rows of terraces with their typical 'corner shops', quite literally at the end of each terrace. One or two outlets would also be sandwiched in the middle of the terraces. Even in 1966, Cox could still note the importance of these kinds of outlets in satisfying local demands

"Closely related as they are to their markets, they are still influential enough in some towns to drain off large shares of the potential market from the town centre, particularly in foodstuffs." (p.13).

In 1955 the total number of shops in Area (i) was 951. Given the above background it is not surprising that many of these were generally of rather low quality serving the surrounding lower class clientele. The range of goods on offer was however extremely wide. Table 1 shows the range and number of different kinds of functions present in this area in 1955 and 1983. The number of grocery stores is immediately striking (backing up Cox's comment on the importance of foodstuffs). This of course was before the major impact of supermarkets and hence most groceries were still bought in the small or local shops. Cheer (1957) also noted the dominance of grocery shops in his study areas of Hampshire, explaining

"In addition, it was noted that the first choice of most corner shopkeepers was of a general grocer's shop. For the amateur who seeks to augment a pension or a husband's income, the keeping of everyday articles comes easier than specialising, and to the more experienced shopkeeper the advantages of spreading any potential loss over the widest possible range of goods and the quick return of a little profit over a comparatively small outlay are appreciated." (p.16).

The exception to the small grocery store was the larger Co-operative store. As Table 1 shows, no fewer than nine were present in Area (i) in 1955. The Co-op store was the first or early version of the supermarket in many cases. Jefferys in 1954 noted that

"Already many societies are prominent in opening self-service units in the grocery and provisions trade, and the Co-operative organization of the distribution of bread and milk is ahead of most." (p.115).

Jones (1980) also notes how important Co-op stores have been in the development of inner city areas.

Table 1 shows that alongside the large number of grocery stores in 1955 were also many other kinds of food-stores. Thus greengrocers, butchers and off-licences were prominent in the hierarchy of functions as were the more specialist fish and chips and sweets and tobacco. Alongside these traditional foodstuff outlets are a number of other traditional kinds of retail outlets:- chemists, hardwear, electrical goods, drapery and lingerie.

The number of service activities is quite high even in 1955. The early forms of services were shoe repairs, general repairs, cafes, dry cleaners and launderettes (see Table 1). At the lower end of the hierarchy are a number of more specialist activities which could only survive without much competition, especially being in such close proximity to the city centre. Good examples include, sport and camping goods, jewellers, travel agents, bridalwear, art materials/pictures and one of the last pawnbrokers in Leeds.

The kinds of activities present in the retailing environment often give a sound indication of the ethnic characteristics of the surrounding population. Thus in this area in 1955 we see seven Kosher butchers still in business. This is very much less than say, fifty years earlier. In the late nineteenth and early twentieth centuries the area between Sheepscar and the University (see Figure 1) was a thriving Jewish neighbourhood. By the late 1950s many had migrated to more affluent suburbs. Connell (1970) notes

"But the majority of the elite had moved north to Moortown Corner, where the first synagogue was established in 1945, and in the 1950s further north to Alwoodley and Sandmoor on the very edge of the city and into some of the areas of highest social status in Leeds" (p. 54)

Some of the poorer Jews did remain for much longer however in Sheepscar and Chapeltown. Apart from Kosher butchers the presence of a large Jewish population also brought a large number of shops and businesses connected with clothing (especially on North Street which linked Sheepscar to the City Centre - the 'Leylands' as it was formerly known). Thus in 1955 there still remained thirty ladieswear outlets, seventeen menswear or tailers and twenty-seven general clothing shops (men, women and childrenswear). Some of these kinds of businesses had become much larger of course, epitomised by Montague Burton who was able to build a large clothing factory in Harehills and then open up a new Jewish Community in the Harrogate area (Connell, 1970).

So much for the pattern of shops in 1955. By 1983 the total number of outlets in Area (i) had been greatly reduced, from 951 to only 149. The areas most effected by the decline have been the triangular region between Sheepscar, Woodhouse Street and Woodhouse Lane and the region surrounding (and particularly to the south of) the University (see Figure 1):- i.e. the immediate inner-city areas. The number of shops in the other regions of Area (i) have also declined but in far less drastic a manner.

Table 1 also lists those activities present in 1983. It is interesting that grocers still dominate the 'hierarchy' although only nineteen stores remain. Similarly the other principal foodstuffs are relatively dominant, especially butchers, green-grocers, bakers and sweets and tobacco. It is clear, however, that the nature of retailing in Area (i) has greatly changed. Many of the shops now offer a whole new range of goods and services.

It is apparent from Table 1 that the presence of new ethnic groups have been important in influencing retailing in the area. In particular Area (i) has witnessed a large increase in its Asian population which has transformed much of the Chapeltown and 'Brudenells' areas (see Figure 1), and in part accounted for the greater degree of retail stability in these two regions. Many of the remaining grocers in these areas are now in the hands of Asian entrepeneurs, as are many other functions:- Table 1 shows how important Indian restaurants have become in the overall hierarchy. Similarly, for example, the one listed accountants/building society agent is in the 'Brudenells' area and is Asian owned (a rare occurence in the financial market). It is also interesting that the building society represented here is the Leicester, an area with one of the largest Asian populations in Britain.

Dawson and Kirby (1980, p. 175) note that the importance of Asian retailing has not had great coverage in the literature. Most work to date has been undertaken by McEvoy, Cater and Jones (see for example, Cater and Jones, 1978; Cater, 1979; Cater, Jones and McEvoy, 1982; McEvoy, 1984). Generally the Asian community look upon retailing as an important step in establishing their community and of advancing in British society. They are often prepared to work long hours, thereby increasing the degree of convenience to local customers, and generally stock a wide range of goods. (The latter is important in that the local Asian clientele can be served with goods not available in local supermarkets or superstores.) Thus many Asian grocers are keen to expand into other product lines, making modern-day grocery stores more like the traditional village store of yesteryear. For example it is now not unusual to see videos for hire within Asian grocers (which causes problems to the simple classification of activities adopted here). In these ways then, formerly unprofitable grocery outlets can be maintained as viable concerns. Cater and Jones (1978) also stress the important cultural benefits of Asian shops, suggesting they perform a similar cultural function to Mosques and Sikh temples.

Whilst noting the importance of ethnic retailing the continuing loss of Jewish establishments, as they progress northwards, should also be noted.

Apart from Asian concerns there are also a number of other important changes. Table 1 shows how the number of 'fringe' of sporadic activities has increased:; 'CB' radio equipment, french polishers, alarms, upholsterers etc. In this latter category also comes the solitary 'Private' sex shop, traditionally located in areas of 'dubious character' (see Royle, 1984, for a recent discussion).

Apart from these fringe activities we also see further evidence of retail decline. Thus of the 150 outlets still standing in 1983, nine had been converted to purely wholesale use, five currently stood vacant, a further two were vacant and clearly waiting demolition and one lay temporarily burnt out.

The decline on the scale shown here seems drastic when compared to the national average. Dawson (1983) indicates an approximate fifty per cent reduction in the average number of independent shops across the country as a whole (450,000 in 1950 to 230,000 in 1981). In this study, we have seen a reduction of around 84% in Area (i). What reasons can be put forward for a decline on this scale?

It is perhaps generally true that the reasons for the demise of the independent small shop are numerous and that no reason can be singled out as dominant (Dawson, 1983). Undoubtedly, however, of greatest importance here has been the huge decline of population caused by vast slum-clearance programmes which have devastated much inner-city housing. (The population in Area (i) has declined from approximately 15,000 in 1961 to 6,700 in 1981.)

The speed of this demolition since the 1950s has at times been breathtaking. Indeed it is interesting to note that "the relatively instantaneous depopulation of a city's inner core after centuries of lively inhabitation" is one of Amson's (1975) list of discrete or rapid changes in urban systems.

On top of these changes have come vast new road-widening schemes and the subsequent creation of a number of inner-ring roads or urban motorways - in Leeds, for example, the huge 'Sheepscar Interchange system', in the heart of Area (i). Also the expansion of the University and Polytechnic has caused much re-development within the area (Leeming, 1984). The consequences of these planning legislations have thus been immense. Further proof and comment come from Kirby (1975):

"At the same time, in urban areas, re-development and slum-clearance schemes have undoubtedly resulted in the destruction of many small, back-street shops, and as the density of shopping provision in the newly developed suburbs is usually much lower than in the older parts of the towns, a net reduction has occurred." (p.488)

and, more strongly, from Lock (1976):

"Clearance schemes have either extinguished small shops altogether or - somehow more cruelly - have marooned them in a sea of dereliction and have stripped their customers off to new estates. Then there has been the negative side of the planners work, which is the blight they have caused to shopping frontages thanks to extravagent road-widening schemes" (p. 207).

Such schemes therefore have been instrumental in the decline of retailing environments in inner-city areas. As we have seen, where the small shop survives it is often in the form of new organizational structures such as Asian retailing) or through more specialised functions. It has also hastened the decline of the traditional 'corner shop', that being synonomous with end-terraced housing. This still survives in parts of Leeds (for example the 'Brudenells' - see Figure 1) but more generally it has led Branston (1980) to interestingly speculate

"There is much comment that the corner shop is extinct. The 'corner shop' is a definition most misleading in the context of today's problem. The 'corner shop' was a product of Victorian development. Many streets of terrace houses had a shop at the end, literally a corner shop. That was a kind of shopping that was developed to meet social and economic need, a commercial need of the past and it is gone. So people who talk about 'corner shops' should remember that it is an extinct kind of shopping and doesn't really enter into our considerations today". (p. 24)

This discussion on changes to the urban environment and hence, ultimately, population, is made more interesting when the concept of 'shop per head' is examined in more detail. Table 1 shows a detailed breakdown of the number of shops in each category per ten thousand of the population in Area (i). In 1955 we see that the 951 shops in Area (i) served a population of approximately 15,000; thus the number of shops per ten thousand of the population was of the order of 630. This ratio had been reduced to 220 by 1983 (note these are very high rates indeed, even in 1983, when compared to the rest of the city - see Tables 1 to 3). Thus not only had the number of shops overall declined but so also had the number of shops per ten thousand of the population. Thus the decline was both relative and absolute, with a 65.07 per cent reduction in the number of shops per ten thousand of the population. The interested reader can examine similar relationships between shops per ten thousand of the population for all the activities listed in Table 1. Examining the number of shops in this way provides an interesting picture of retail change. Clearly where a certain function is no longer present in 1983 then there has been a 100 per cent decline, whereas a new facility in 1983 records an infinite percentage increase. More interest develops in between these extremes. For example although there was one art materials/pictures outlet in Area (i) in both 1955 and 1983, the number of art material outlets per ten thousand of the population had increased by 116 per cent by 1983!

Whilst planning legislation has obviously been important in the immediate inner-city areas there are other explanations to offer regarding the declining numbers of small shops elsewhere:- both here in the remaining regions of Area (i) and in parts of Area (ii) (see Figure 1) where the urban environment has been relatively more stable. Many of these reasons are covered in the literature on small shops in Britain and so only a brief synopsis will be given here. The interested reader can find great detail in the references cited.

One of the reasons commonly put forward for retail failure at this scale are the inadequacies of retailers themselves. Often the borderline between success and failure is small (especially in areas of great social change) and only the hardy entrepreneurs can survive. Kirby (1980-A) neatly sums up these inadequacies

"On the basis of the evidence available it would appear, though, that many small retail firms are under-capitalised from the outset and that very few new entrants have any experience of retailing, have any training in retailing or have any awareness of the modern methods in retailing or running a business. As a consequence, many small shops appear to be badly maintained, ill-equiped, poorly managed and ill-suited to their roles in the total retail system". (p. 5)

Many shop-keepers do find their entrepreneurial life short lived. The team of sociologists in Edinburgh (Bechhofer et al, 1971, 1974) back up many of Kirby's (1980) assertions with a questionnaire study of retailers. They found high rates of turnover in ownership patterns of small shops in Edinburgh with a large number of stores changing hands every six to twelve months.

Whilst the whole field of small-scale retailing is often vulnerable the small shop-keeper has also discovered other retail trends impinging on his ability to stay in business. The increasing nature of competition from larger stores has been the subject of a number of studies. As early as 1962 McClelland was speculating on the likely impacts of new supermarket developments. Since then superstores and hypermarkets have also appeared bringing increased economies of scale for both producers and consumers and associated cheaper running costs, and buying costs etc. Dawson and Watkin (1976) remark

"One of the fundamental changes which occurred in retailing, throughout Europe, during the 1960s and 1970s was the general increase in the scale of operations, both of establishment and organization" (p. 76).

Similarly Kirby (1975) notes

"One of the chief reasons for the decline of the small retail unit is an awareness on the part of the operator and the consumer of the advantages to be gained from economies of scale". (p. 497)

With economies of scale and the tendency towards larger stores comes the problem of 'scrambled merchandizing' where larger stores stock a range of goods rather than one or two main functions or activities. Kirby and Law (1981), through their questionnaire of small retailers, felt 'scrambled merchandizing' to be a "death knell" for the small retailer (p. 18).

In this study region, Area (i), it is difficult to measure the impact from larger stores over and above the loss of outlets through slum-clearance programmes (although note the shops per ten thousand of the population ratios). However, there have been an increasing number of supermarkets built within the larger shopping centres (Clarke and Macgill, 1984) which must have had an impact, especially when one considers the increased car-ownership statistics since 1950. A more mobile population can, of course, participate in fewer shopping trips to larger stores some distance away. This point will be taken up again in the next section.

Alongside the problems arising from local Government plans and increasing competition comes a mass of National Government legislation which has also hit the small retailer (Berry, 1978; and McClelland, 1972, provide useful summaries). The abolition of retail price maintenance, for example, meant that larger stores could pass on the savings made from economies of scale to the consumer with obvious consequences for the small retailer unable to buy in such large quantities. Similarly the introduction of selective employment tax (Reddaway, 1970; Berry, 1978) and value added tax (Davies, 1975; Thorpe, 1975; Kirby and Law, 1981; Berry, 1978) have also had considerable impacts on small retailers.

The problems and policies affecting the small shop are neatly summed up by Dawson and Kirby (1977 and 1979). The brief discussion has been important here to acknowledge the fact that not all the blame for the decline of the small shop in Leeds can be pinned on slum-clearance and local planning decisions. Much of the above discussion is also particularly relevant to the next section where we consider a more stable urban environment and the changes which have occurred there.

Area (ii) : stability

As Figure 1 shows, Area (ii) in the study is the relatively small region between Hyde Park and Moortown, including Far Headingley, Headingley, Chapel Allerton and Meanwood. These areas are very much the early Leeds suburbia, and therefore didn't have as many corner shops in the first place; they are characterised by a mix of housing types and densities. Thus there are a variety of housing forms, from terraces (though not as densly packed as in the inner-city area) to more spacious semi-detached and detached structures. Much of the housing is also a legacy of public or private housing estates common elsewhere in Britain in the inter-war period.

The integration of these two different housing forms (the terrace and the (semi)-detached) brings with it two different kinds of retail structure. First, connected with the terraces, particularly in parts of Headingley and Meanwood, is the proliferation of the sort of retail environment we saw in the last section:- that is a number of 'corner shops' associated with end and sometimes middle terraces. Less dense housing structures, especially when incorporated into some form of estate, introduce a new kind of retail phenomenon, that of the shopping parade:- that is the small cluster of shops normally in a central location with respect to local housing, often aimed to serve a pre-determined catchment area. This kind of retail structure was a common feature of post-1914 planning throughout the country. Hislop (1980) describes the development of local authority shopping parades in Swindon:

"In the early 1930s Swindon Borough Council started developing small-scale shopping centres of some eight shops on the council housing estates - such things as supermarkets had not been heard of, but we are talking in terms of six to eight 750 square feet retail shops selling the normal convenience goods, all separately let on normal rack rental terms" (p. 11).

The development of parades in Leeds took a similar form. The total number of shops in the area however is not great and this must reflect the presence of Chapel Allerton, Meanwood and Headingley with their much larger shopping centres. (The reader is reminded here that shops within the major shopping centres are not included here, we are primarily interested in the local/convenience small shop outside the main shopping centres.)

In 1955 168 outlets were present, declining to 143 by 1983. Thus whilst there has been a small drop in the total number of shops (which we might expect given the problems discussed in the last section) the overall retail environment has been relatively stable. Indeed Table 2 shows that whilst there has been a reduction in the total number of shops, the total per ten thousand of the population has actually increased by some 15 per cent. (There has been a steady population decline:- approximately 30,000 in 1961, 24,000 in 1981.) Table 2 also lists the fortunes of the different functions in a similar fashion.

As Hislop (1980) hints above, one characteristic of suburban shopping parades is the pre-dominance of a 'set' of convenience food outlets, especially the grocer, greengrocer, butcher and baker (in/by 1955). Making up the typical parade might also be a newsagent or tobacconists, a chemist, post-office, or launderette/dry cleaners. The end-parade shop might be a fish and chip shop or a hair salon. The pre-dominance of these kinds of activities in the overall hierarchy of functions in 1955 can be seen from Table 2. As in Area (i) the early supermarkets were in the form of Co-op outlets which were generally larger in the suburban areas than the inner city.

By 1983, however, there have been important changes. There has, though, been a degree of stability within the parades, in particular, in terms of the more perishable day to day items. Thus, as Table 2 shows, butchers, green-grocers, bakers and grocers are still important in the overall hierarchy.

Indeed, it is interesting to note that eight out of the nine butchers present in 1983 were on the same site in 1955 as well as nine out of the eleven green-grocers and eight out of the ten bakers. (In non-food outlets chemists have also shown remarkable stability:- all eight chemists present in 1983 were on the same site in 1955.) The number of grocers has, however, fallen by well over fifty per cent. To explain this decline, it seems that one needs to examine the increasing nature of competition in the grocery sector since 1955. Interestingly, Wilson and Oulton (1983) start their paper

"It is evident to anyone who was alive during the 1950s, that since that time there has been a major shift in the mode of retailing of food goods - from a 'corner shop' spatial economy to a 'supermarket' one" (p. 265).

They examined how grocery/food outlets had changed in Nottingham over the last twenty five years. They concluded that 1956 was clearly shop-dominated (i.e. small shop), and 1973 was supermarket dominated:- 1963 was seen to be their critical period of transition.

Here the problem does not seem quite so clear-cut. In many instances we have to interpret the Co-op stores as being the pioneer self-service supermarkets, which were clearly present in our study area by 1955. However it is interesting to note when the first supermarkets appear and how they are concentrated within the major shopping centres.

In Leeds it is possible to argue that any 'transition' was certainly post 1963:- 1965 to 1971 would seem to be the key period in this study area. The early supermarkets were the 'Thrift store' chain but these were often not much larger than the typical grocery shop. By 1971, however, a large number of supermarkets are well-established within the major shopping centres. Clarke and Macgill (1984) show the rapid growth of supermarkets between 1966 and 1971 within all the major centres of Leeds. Many of the supermarkets were synonymous with new 'Arndale' or other such similar developments within shopping centres. Thus 'Safeways' adopted the prime site in the new Arndale development at Headingley in 1965-66.

As Table 2 shows, compensating for the decline in the number of grocers (and one or two other losses, most notably shoe-repair outlets) has come an increase in the number of 'fringe' or less common activities and a small increase in the number of service functions. In the former category could be placed, toys and models, pets, art materials, cash registers etc. The number of service activities remains fairly small:- bookmakers and 'take-aways' for example, although we should note the continuing success of hair salons. The reason for the small number of service activities probably lies in the fact that Area (ii) is not the most affluent in Leeds. Clarke (1984-A, -B) showed how service activities have been drawn to areas of greater affluence (and see the discussion in the next section). As in Area (i), Area (ii) has also seen the arrival of a number of technically non-retailing activities on former shop sites:- i.e. bridge club, wholesalers, taxi/rank/office. Also five shops were recorded as being vacant in 1983 which no doubt reflects some of the recent problems encountered by small retailers, discussed in the previous section.

Area (ii) then seems to be a transition zone between the extremes of small-scale decline and growth. Attention now focuses on small-scale growth in the retailing environment.

Area (iii) : growth

The third region in our Leeds study is by far the largest geographically and incorporates the areas to the north of Far Headingley and Meanwood. This includes the newer, more affluent suburbs of Moortown, Lawnswood, Adel and Alwoodley (see Figure 1).

Although the extent of suburbanization has obviously increased since the 1950s, much of the housing in Area (iii) was already laid down by 1955. Expansion has generally occurred in the most northerly sectors of the area, mainly through infilling, where population increase has been as high as 15 to 20 per cent in some areas (1961-1981). Elsewhere, two factors seem especially important in explaining why population totals have been kept far more constant:- first a small decline in population in the most southern areas (where it borders Area (ii) and the formerly more densely packed housing environments), and secondly because the area comprises a great deal of 'green-field' areas, including large acreages of woodland and parks, sports grounds and golf courses, and large tracts of university playing fields and residency areas. Thus, overall, the general rise in population in Area (iii) has been of the order of only 5 to 10 per cent.

By 1955 there were a total of 81 shops in Area (iii), the majority of which were in the southern and central areas of the region. Facilities were located in the north but were generally only present in small numbers. By 1983 there were 116 shops, and much of this expansion has occurred beyond the Ring Road (see Figure 1). Table 3 shows that the growth in shop numbers has matched the rise in population since 1961. Whilst the number of shops has increased from 81 to 116 the number of shops per ten thousand of the population in Area (iii) has also increased from 22.8 to 31.2, a 36.76 per cent increase compared to a 43.2 per cent increase for actual shop numbers. The overall densities, however, have remained rather low and certainly well below those in Areas (i) and (ii).(see Tables 1 to 3). Again the interested reader can compare the number of shops per ten thousand of the population for each of the activities listed in Table 3, and indeed Tables 1 to 3).

However, population growth is not the only factor which has been put forward to account for the increasing suburban nature of retailing. Kivell (1972) suggests another four contributory factors; increasing levels of car ownership and hence mobility, the increasing unsuitability of many central shopping locations, the availability of land in suburban areas and a host of 'institutional factors' including, for example, the cheaper price of that available land. Whilst Kivell does distinguish between the different sizes of suburban centres, his arguments have been more directed at larger stores and shopping centres. Little or no comments are made on how these factors have affected the smaller shop. For this latter group the simple phenomenon of population growth seems the most appropriate explanatory factor.

The low-density nature of the housing sector in Area (iii) generally has led to a predominance of parades of shops rather than isolated stores. Thus the first point to notice concerning the functions present in 1955 (Table 3) is how similar the overall structure is to that of Area (ii) (Table 2). The larger number of post-offices in Area (iii) in 1955 and 1983, and the fact that the number has remained stable, gives an indication of how much more widespread the parades are, making them far more self-contained in nature. There is little of great surprise in the hierarchy of activities shown in Table 3 therefore.

Again, as we have seen in the last two sections, the last twenty five years or so have brought important changes however. Table 3 lists the functions present in 1983. It is noticeable that again the perishable foodstuffs, butchers, greengrocers, bakers, have retained their importance in the overall hierarchy of functions. The decline of grocers is once again apparent, however. This seems somewhat odd given that Moortown is the nearest shopping centre of any size, thereby, seemingly, increasing the need for more local facilities. This is especially surprising given the fact that 'voluntary group' grocers are particularly keen to be active in higher income areas. There is now a wide literature on the role of voluntary groups (see Kirby, 1974-A, 1975; Smith, 1971; Dawson and Kirby, 1979), but Kirby (1975) provides a neat summary of their objectives

"Voluntary group wholesaling is an attempt to introduce the benefits of central buying to the independent sector thereby enabling the small retailer to sell competitively" (p. 499).

Thus affiliation to groups such as 'Spar', 'Mace', 'VG' etc. can bring cheaper costs to the small retailer. However, as Smith (1971) notes, there are problems of becoming involved within voluntary groups for many small retailers. Generally, it seems, voluntary groups are not too keen on servicing the 'small order' which has obviously penalised the small grocer with a small catchment area.

In terms of this study area (Area (iii)) one might expect a greater degree of participation in the voluntary group sector given the larger catchment areas of the local parades and the newer, purpose-built nature of many of the shops (which the voluntary groups favour - Kirby, 1980). Indeed two out of the three remaining grocers are in the hands of voluntary groups, 'VG' and 'Maid Marian', yet the overall number obviously remains extremely small.

One might argue that the arrival of the superstore on the Ring Road at Moortown (Sainsbury's - see Figure 1) has also had a detrimental effect on the number of independent grocers. This is difficult to speculate on here since the superstore is only a few years old and our time period covers some two and a half decades. We should also note David Kirby's 'polarization theory' in which (Kirby, 1976) he suggests that small food stores may be making a comeback as superstores hit supermarkets in particular and cannot compete with the small local shop in terms of convenience.

The surprising lack of local grocers may also be partly offset by the fact that the more affluent an area, the greater the mobility (making longer shopping trips less of an inconvenience) and the greater the rates of fridge/freezer ownership (making the number of shopping trips less frequent). The goods most likely then to be required locally may be more than adequately provided in the local greengrocers, butchers, bakers etc.

Aside from foodstuffs, Table 3 shows that there has been considerable growth in more specialist goods and service activities since 1955. Of these activities it seems several have been primarily attracted to the area by the higher income groups which make up the majority of the local clientele. Thus by 1983 there are a number of antique shops, wine merchants, a computer outlet, a jewellers and a television/video shop (the latter trades normally synonymous with much larger shopping centres).

Also apparent from Table 3 is the large number of service or 'quasi-retail' activities which have located in the area, particularly financial institutions. Since 1955, three estate agents, one insurance office and one assurance office. These latter three financial institutions also double-up as building society agents. Clarke (1984-A) examined the rise of service activities throughout all the shopping centres of Leeds since 1961, particularly focussing on building societies. In that paper , the different rates of building society diffusion varied greatly between the shopping centres. The two primary location criteria were seen to be large pedestrian flows (i.e. in the larger centres) or greater presence of higher income consumers.

In Area (iii) of this study, whilst the pedestrian flows within these typical parades is not great the presence of so many high income residents, coupled with high rates of owner-occupation (meaning more customers for mortgages), has enabled the building societies to seek positions within these smaller parades. However, the small pedestrian flows, coupled with uncertainty, is obviously still seen as something of a deterrence factor and most of the societies present here are represented through agencies rather than full branches. By 1983 then, there are agencies of the National and Provincial, the Abbey National, the Leeds Permanent, the Leeds and Holbeck and the Yorkshire Building Societies.

The presence of these national building society companies in Area (iii) is also paralleled in other sectors of the retail environment. In Areas (i) and (ii) the presence of multiple groups, normally defined as a firm of ten or more branches, was insignificant, the only ones being a number of national bookmaker firms, eg. Ladbrookes and William Hill. As Clarke (1984-A) notes, this follows the desire of bookmaker firms to locate in areas where there are large numbers of working-class men as well as in more affluent areas.

Clarke (1984-C) also examined the spread of multiples across the suburban centres of Leeds since 1961. In many ways the locational criteria of the major multiples matches those of the financial institutions mentioned above (many financial institutions are multiple firms in any case). Thus the multiples too are generally keen to locate in centres of large pedestrian flows or in areas of generally higher socio-economic status. This means that multiples may be attracted to smaller parades in more affluent areas when normally parades of such size would not be attractive to national multiple concerns (Cox, 1966). Thus in Area (iii) by 1983 are the financial institutions mentioned above, plus branches of Dewhurst's (butchers), Ainsleys (bakers), Victoria Wine and Goldfinch (wine merchants), Ladbrookes, William Hill and Peter Smiths (book makers).

As the percentage of the market share held by multiples increases it will be interesting to watch these suburban developments of multiple firms in future years.

Conclusions

This study has been concerned with the changing structure and patterns of small-scale retailing in a section of North Leeds since 1955. Three broad areas were identified as having a different history of recent retail change: first an area of considerable shop loss around the inner-city, second a more stable retail environment, where the loss of shops has been relatively minor, and third an area to the north of the city where the actual number of shops has increased with the growing population.

It is evident that despite important changes the small or local shop remains an integral part of the whole retail environment of the city. Whatever the next thirty years of retail change brings it must undoubtedly continue to be a vital sector of the retail economy, with the emphasis on catering for the least mobile and less affluent members of the community (in terms of their availability to cars, freezers etc.) and fulfilling the valuable convenience role.

As well as the dramatic changes in shop numbers the study has focussed on how different functions or activities have grown or declined since 1955. Clearly the loss of many grocery outlets has been apparent as too has been the growth of fringe or uncommon activities and services.

Finally it is worth noting that this study has looked at only one slice of the 'Leeds cake'. Cutting through the cake in a different manner might have led to different conclusions. However, it is hoped that the particular slice chosen has provided an interesting variety of retail change.

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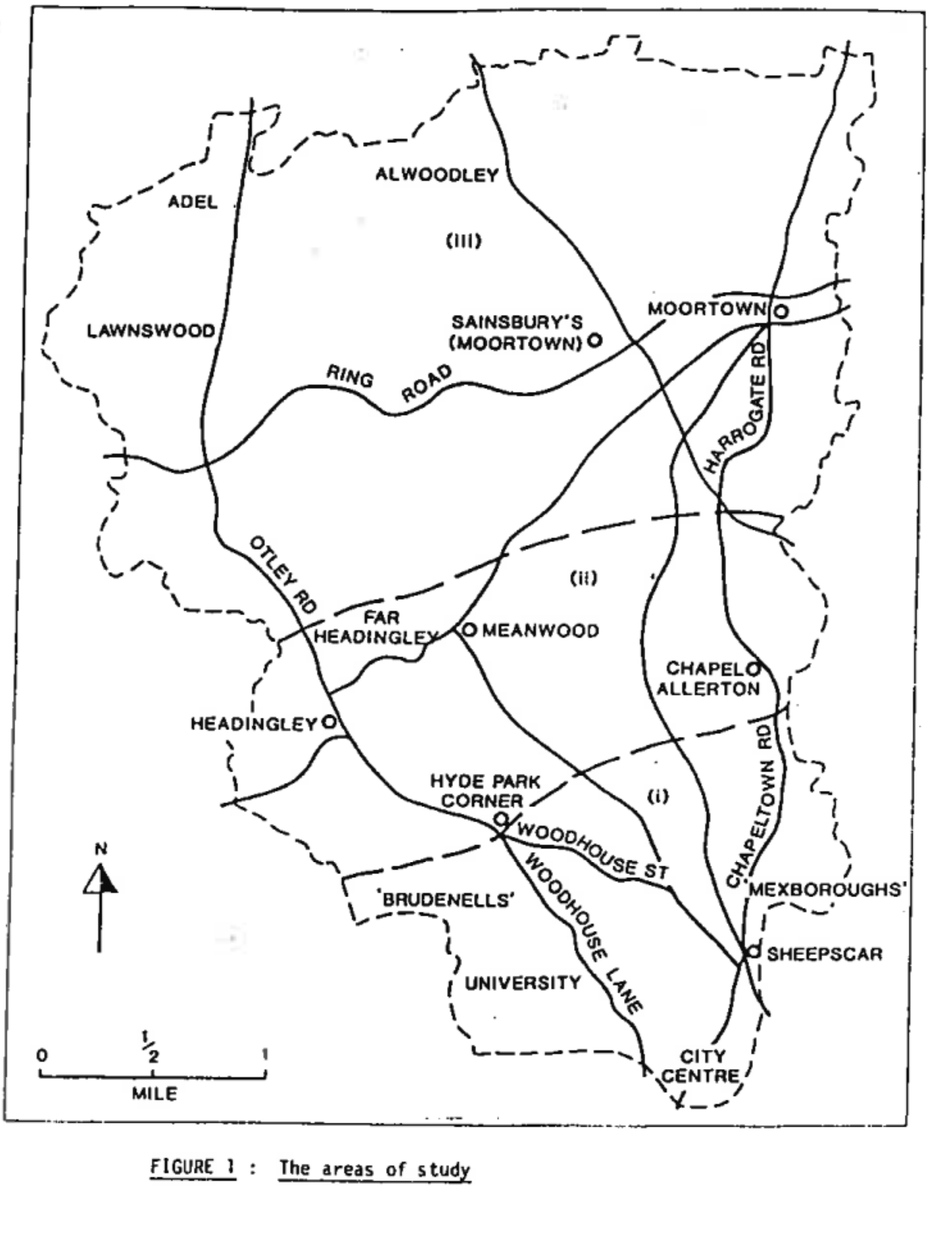

FIGURE 1 : The areas of study

NSPTP = Number of shops per ten thousand of the population

SHOP TYPE	1955 TOTAL	1983 TOTAL	1955 RANK	1983 RANK	1955 NSPTP	1983 NSPTP	% CHANGE 1955-1983 IN NSPTP
Grocer	212	23	1	1	141.8	34.20	-75.88
Greengrocer	67	5	2	8=	44.9	7.45	-83.40
Butcher	54	7	3	5=	36.2	10.43	-71.16
Fish & chips	41	7	4	5=	27.5	10.43	-62.07
Hair salon	40	8	5	3=	26.8	11.93	-55.48
Sweets & tob.	38	4	6	10=	25.5	5.96	-76.62
Newsagent	36	7	7	5=	24.1	10.43	-56.72
Baker	35	4	8	10=	23.5	5.96	-74.64
Shoe repairs	34	2	9	18=	22.8	2.98	-86.92
Ladieswear	30	2	10	18=	20.1	2.98	-85.17
Dry cleaners	29	2	11	18=	19.4	2.98	-84.63
Mixed clothing	27	1	12	27=	18.1	1.49	-91.76
Hardwear	23	3	13=	15=	15.4	4.47	-70.95
Electrical	23	2	13=	18=	15.4	2.98	-80.65
Chemist	21	3	15	15=	14.1	4.47	-68.29
Menswear	17	1	16	27=	11.4	1.49	-86.93
Footwear	15	-	17=	-	10.0	-	-100.00
Drapery	15	2	17=	18=	10.0	2.98	-70.20
Furniture(1)	14	3	19	15=	9.4	4.47	-52.44
Lingerie	12	-	20=	-	8.0	-	-100.00
Toys/stat.	12	1	20=	27=	8.0	1.49	-81.38
Fancy goods	12	4	20=	10=	8.0	5.96	-25.50
Post-office	11	1	23=	27=	7.4	1.49	-79.86
Seeds/plants	11	-	23=	-	7.4	-	-100.00
Clothes(secs.)	10	-	25=	-	6.7	-	-100.00
Cafe	10	1	25=	27=	6.7	1.49	-77.76
Wallpaper etc.	9	-	27=	-	6.0	-	-100.00
Co-op branches	9	-	27=	-	6.0	-	-100.00
Kosher butcher	7	-	29	-	4.7	-	-100.00
Bank	6	-	30	-	4.0	-	-100.00
Opticians	5	1	31=	27=	3.4	1.49	-56.17
Wool shop	5	1	31=	27=	3.4	1.49	-56.17
Cycles	5	-	31=	-	3.4	-	-100.00
Haberdashery	5	-	31=	-	3.4	-	-100.00
General repairs	4	-	35=	-	2.7	-	-100.00
Launderette	4	1	35=	27=	2.7	1.49	-44.81
Books	4	2	35=	18=	2.7	2.98	+10.37
Furniture(2)	4	-	35=	-	2.7	-	-100.00
Leather goods	3	-	39=	-	2.0	-	-100.00
Insurance	3	2	39=	18=	2.0	2.98	+49.00
Pets	3	-	39=	-	2.0	-	-100.00
Childrenswear	3	1	39=	27=	2.0	1.49	-25.50
Meats/dairy	3	-	39=	-	2.0	-	-100.00
Driving school	2	-	44=	-	1.3	-	-100.00
Sports/camping	2	-	44=	-	1.3	-	-100.00
Jewellers	2	-	44=	-	1.3	-	-100.00
Travel agents	2	-	44=	-	1.3	-	-100.00
Florists	2	-	44=	-	1.3	-	-100.00
Musical insts.	1	-	49=	-	0.7	-	-100.00
Car accessories	1	4	49=	10=	0.7	5.96	+751.43
Household items	1	-	49=	-	0.7	-	-100.00
Fishmonger	1	-	49=	-	0.7	-	-100.00
Bridalwear	1	-	49=	-	0.7	-	-100.00
Prams/babywear	1	-	49=	-	0.7	-	-100.00
Art materials	1	1	49=	27=	0.7	1.49	+112.85
Sports/leather	1	-	49=	-	0.7	-	-100.00
Millinery	1	-	49=	-	0.7	-	-100.00
Pawnbroker	1	-	49=	-	0.7	-	-100.00

SHOP TYPE	1955 TOTAL	1983 TOTAL	1955 RANK	1983 RANK	1955 NSPTP	1983 NSPTP	% CHANGE 1955-1983 IN NSPTP
'Wholesalers'	-	9	-	2	-	13.40	oo
Indian rests.	-	8	-	3=	-	11.93	oo
'Vacant'(3)	-	5	-	8=	-	7.45	oo
Betting shops	-	4	-	10=	-	5.96	oo
Chinese t/aways	-	2	-	18=	-	2.98	oo
'Vacant'(4)	-	2	-	18=	-	2.98	oo
Health foods	-	1	-	27=	-	1.49	oo
Fast foods	-	1	-	27=	-	1.49	oo
Upholsterers	-	1	-	27=	-	1.49	oo
DIY/glass	-	1	-	27=	-	1.49	oo
Accountants	-	1	-	27=	-	1.49	oo
Building socs.	-	1	-	27=	-	1.49	oo
Funeral dirs.	-	1	-	27=	-	1.49	oo
Alarms	-	1	-	27=	-	1.49	oo
French polishers	-	1	-	27=	-	1.49	oo
Delicatessen	-	1	-	27=	-	1.49	oo
'Fire damaged'	-	1	-	27=	-	1.49	oo
Photographers	-	1	-	27=	-	1.49	oo
CB equipment	-	1	-	27=	-	1.49	oo
Sex shop	-	1	-	27=	-	1.49	oo
TOTAL	951	149	-	-	630	220	-65.07

Notes: (1) Second-hand furniture
(2) Modern furniture
(3) Vacant awaiting re-occupation
(4) Vacant awaiting demolition

TABLE 1 : Retail change in Area (i)

NSPTP = Number of shops per ten thousand of the population

SHOP TYPE	1955 TOTAL	1983 TOTAL	1955 RANK	1983 RANK	1955 NSPTP	1983 NSPTP	% CHANGE 1955-1983 IN NSPTP
Grocer	33	12	1	1=	10.5	5.17	-50.73
Greengrocer	15	11	2	3	4.8	4.73	-0.83
Butcher	14	9	3	5	4.5	4.03	-9.33
Baker	13	10	4	4	4.1	4.30	+4.27
Chemist	10	8	5=	6	3.2	3.45	+8.34
Newsagent	10	6	5=	7=	3.2	2.58	-18.74
Hair salon	9	12	7	1=	2.9	5.17	+80.77
Sweets/tob.	8	6	8	7=	2.5	2.58	+1.57
Shoe repairs	7	-	9	-	2.2	-	-100.00
Fish & chips	6	6	10	7=	1.9	2.58	+35.07*
Ladieswear	5	3	11=	14=	1.6	1.29	-18.74
Co-op branches	5	2	11=	19=	1.6	0.86	-45.91
Post-office	5	6	11=	7=	1.6	2.58	+62.26
Electrical	4	1	14	26=	1.3	0.43	-66.08
Kosher foods	3	2	15=	19=	1.0	0.86	-9.47
Wool shop	3	2	15=	19=	1.0	0.86	-9.47
Hardwear	3	3	15=	14=	1.0	1.29	+35.78*
Childrenswear	2	-	18=	-	0.6	-	-100.00
Mixed clothing	2	1	18=	26=	0.6	0.43	-32.81
Dry cleaners	2	-	18=	-	0.6	-	-100.00
Drapery	2	4	18=	12=	0.6	1.72	+169.16
Launderette	1	4	22=	12=	0.3	1.72	+437.50
Menswear	1	1	22=	26=	0.3	0.43	+34.37*
Meats/dairy	1	-	22=	-	0.3	-	-100.00
Fishmonger	1	-	22=	-	0.3	-	-100.00
Lingerie	1	-	22=	-	0.3	-	-100.00
Cycles	1	-	22=	-	0.3	-	-100.00
Opticians	1	-	22=	-	0.3	-	-100.00
'Vacant'	-	5	-	11	-	2.15	oo
Car accessories	-	3	-	14=	-	1.29	oo
Art materials	-	3	-	14=	-	1.29	oo
Wine merchants	-	3	-	14=	-	1.29	oo
Taxi office	-	2	-	19=	-	0.86	oo
Furniture	-	2	-	19=	-	0.86	oo
Chinese T/away	-	2	-	19=	-	0.86	oo
Betting shops	-	2	-	19=	-	0.86	oo
Footwear	-	1	-	26=	-	0.43	oo
Pets	-	1	-	26=	-	0.43	oo
Toys/models	-	1	-	26=	-	0.43	oo
'Wholesalers'	-	1	-	26=	-	0.43	oo
'Bridge club'	-	1	-	26=	-	0.43	oo
Cash registers	-	1	-	26=	-	0.43	oo
Sports goods	-	1	-	26=	-	0.43	oo
Florists	-	1	-	26=	-	0.43	oo
Delicatessen	-	1	-	26=	-	0.43	oo
Indian rests.	-	1	-	26=	-	0.43	oo
Video tape hire	-	1	-	26=	-	0.43	oo
Motor cycles	-	1	-	26=	-	0.43	oo
TOTAL	168	143	-	-	53.4	61.58	+15.32

TABLE 2 : Retail change in Area (ii)

SHOP TYPE	1955 TOTAL	1983 TOTAL	1955 RANK	1983 RANK	1955 NSPTP	1983 NSPTP	% CHANGE 1955-1983 IN NSPTP
Grocer	13	3	1	11=	3.7	0.81	-77.86
Greengrocer	10	10	2	1	2.8	2.69	-4.67*
Butcher	8	8	3	3=	2.3	2.15	-4.42*
Post-office	7	8	4	3=	2.0	2.15	+9.13
Chemist	6	4	5	8=	1.7	1.08	-36.37
Newsagent	5	6	6=	6	1.4	1.61	+14.18
Baker	5	4	6=	8=	1.4	1.08	-23.40
Hair salon	4	9	8=	2	1.1	2.42	+84.68
Sweets & tob.	4	1	8=	22=	1.1	0.27	-76.21
Ladieswear	3	3	10=	11=	0.9	0.81	-5.12*
Co-op outlets	3	3	10=	11=	0.9	0.81	-5.12*
Fish & chips	3	3	10=	11=	0.9	0.81	-5.12*
Electrical	2	1	13=	22=	0.6	0.27	-51.78
Hardwear	2	5	13=	7	0.6	1.34	+139.28
Shoe repairs	1	-	16=	-	0.3	-	-100.00
Dry cleaners	1	1	16=	22=	0.3	0.27	-3.57*
Fancy goods	1	-	16=	-	0.3	-	-100.00
Leather goods	1	-	16=	-	0.3	-	-100.00
Lingerie	1	-	16=	-	0.3	-	-100.00
Cafe	1	-	16=	-	0.3	-	-100.00
Wine merchants	-	8	-	3=	-	2.15	oo
'Vacant'	-	4	-	8=	-	1.08	oo
Launderette	-	3	-	11=	-	0.81	oo
Wool shop	-	3	-	11=	-	0.81	oo
Estate agents(5)	-	3	-	11=	-	0.81	oo
Antiques	-	3	-	11=	-	0.81	oo
Banks	-	3	-	11=	-	0.81	oo
Drapery	-	2	-	20=	-	0.54	oo
Video tape hire	-	2	-	20=	-	0.54	oo
Travel agent	-	1	-	22=	-	0.27	oo
TV/video	-	1	-	22=	-	0.27	oo
Kitchen furn.	-	1	-	22=	-	0.27	oo
Micro computers	-	1	-	22=	-	0.27	oo
Jewellers	-	1	-	22=	-	0.27	oo
Clothes 2nds	-	1	-	22=	-	0.27	oo
Tiles	-	1	-	22=	-	0.27	oo
Sewing machines	-	1	-	22=	-	0.27	oo
Building soc.	-	1	-	22=	-	0.27	oo
Art materials	-	1	-	22=	-	0.27	oo
Insurance(4)	-	1	-	22=	-	0.27	oo
Carpet cleaners	-	1	-	22=	-	0.27	oo
Assurance	-	1	-	22=	-	0.27	oo
Delicatessen	-	1	-	22=	-	0.27	oo
'Library'	-	1	-	22=	-	0.27	oo
'Housing dept.'	-	1	-	22=	-	0.27	oo
TOTAL	81	116	-	-	22.8	31.20	+36.76

Table 3 : Retail change in Area (iii)

(5) Includes agency for a building society
* Unequal due to rounding errors