

WORKING PAPER 388

THE DIFFUSION OF THE RETAIL MULTIPLES
ACROSS THE CITY : A REVIEW

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the 1990s, the number of people in the UK who are aged 65 and over has increased by 1.5 million, and the number of people aged 75 and over has increased by 1.1 million (Office for National Statistics 1999).

There is a growing awareness of the need to address the needs of older people in the community. The Department of Health (1999) has published a strategy for older people, which sets out the government's commitment to older people and the actions that will be taken to improve their lives. The strategy is based on the principle that older people should be able to live independently, safely and comfortably in their own homes, and to participate in the community. The strategy also sets out the government's commitment to improve the health and social care services available to older people, and to ensure that older people are able to access the services they need.

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THE DIFFUSION OF THE RETAIL MULTIPLES ACROSS THE CITY: A REVIEW

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Overview

Two of the most important retail changes on the high street over the last twenty years have been the rise of quasi-retail or service outlets (see Clarke 1984-A for a review), and the diffusion of the multiples. Hedderwick et al (1979) are in no doubt as to the importance of the latter:

"By far and away the greatest influence upon retailing over the past two decades has been the capture of market share by the leading multiple and mail order companies. ... In 1979 the volume of goods sold through multiple, mail order or departmental store outlets will be double that of 1961. Over the same period total UK retail demand has risen only by a third. Hence the closure of more than half the independents and Co-op outlets open in 1961 and the overall decline in gross margins". (1979, p. 21).

The national decline of the independent retailer and the growth of the multiple market share is plotted in Figure 1. (Since different sources tend to quote slightly different figures the table is an amalgam of various sources.)

The main focus of attention in this paper is the rise of the multiples. The problems facing the independent retailer (not solely resulting from the pressure of the multiple groups) are discussed in greater detail by Kirby (1974), Jones and Oliphant (1976), Berry et al (1977), Dawson and Kirby (1979), Dawson (1983) (and see references in those papers).

Similarly the steady decline of the Co-op is apparent from Figure 1. As Hedderwick et al (1979) again point out, in terms of market share, the Co-ops have lost one third of their business over the last sixteen years with the actual number of Co-ops being halved between 1961 and 1971.

But what of the rise of the multiples? In this paper the diffusion of the multiples will be examined for a case-study of the city of Leeds, between 1961 and 1983. Between these years around thirty-three shopping centres, ranging from ten to one thousand outlets, can be identified as significant. Change will be examined over time using key years, 1961, 1966, 1971, 1975, 1979 and 1983. Data for each of these years has been assembled and the variety of sources used is explained in some detail in Clarke and Macgill (1984, p. 1-5.).

For the purposes of this paper we will use the Board of Trade's definition of a multiple group, that is an organisation with five or more branches. This is half the number classified in the now defunct Census of

FIGURE 1: Percentage change in the retail market share since 1961

	<u>1961</u>	<u>1966</u>	<u>1971</u>	<u>1975</u>	<u>1978</u>	<u>1981</u>
Independents	54	51	48	43	41	39
Multiples	28	32	36	40	42	45
Co-ops	11	9	7	7	7	6
Mail order & departmental stores	7	8	9	10	10	10

Sources: Economic Intelligence Unit 1976, Department of Industry - quoted in Hedderwick et al 1979,
Dawson 1983, Hillier Parker, 1981:- the latter includes mail order and departmental
stores within the category of multiples (i.e. multiples in 1981 = 55%).

Distribution (1971 being the last available) since it was felt that ten outlets or more did not pick up many of the important local firms which had less than ten outlets yet were still important in the local hierarchy of market share. For this reason no comparisons will be attempted with national figures which in any case are primarily concerned with town or city centres. Similarly, national figures tend to be concerned with the percentage of total floorspace which are in the hands of the multiples. Throughout this paper we will be concerned with the percentage of retail outlets occupied by the multiples. This is an important difference to bear in mind.

The identification of multiple groups has been considerably aided by the availability of Newman's Annual Retail Directories.

Guy (1980) has suggested three types of retail multiple. First the local or regional multiple mainly concerned with food and convenience goods. Second, regional comparison multiple groups mainly located in town and city centres (dealing especially in shoes, jewellery etc.) and third, the regional clothing multiple groups, especially Marks and Spencer, C & A etc. To that classification could be added the large national food chains, primarily those concerned with supermarkets and superstores (eg. Asda, Safeways, Sainsburys, Tesco etc.), and increasingly discount supermarkets (eg. Kwik Save). All of these groups will be important in this study but especially the first, in many of the smaller suburban centres.

The arrival of the multiple group has not of course just happened over the last twenty years. As Figure 1 shows, multiples already had some 28% of the market share by 1961. Shaw and Wild (1979) note how important multiple trades were in shaping the central areas of many Victorian cities, providing standardized products of an often innovative process or activity. Similarly the report of the Benwell Community Project (BCP, 1978) notes that the first signs of the multiples in Benwell were as early as 1880. By then, BCP recognized fourteen firms with more than ten branches nationally. Even by 1900 five firms located in Benwell had over two hundred outlets nationally. During the inter-war years,

"the multiples grew rapidly both in terms of the number of branches and in the size of the firms themselves, especially since depression meant (through purchasing powers) multiples were better able to weather the effects of uneven purchasing power of the working class" (BCP, 1978, p. 19).

Thus by 1965 most major multiples were already well-established in the largest shopping centres (Hedderwick et al, 1979). Since then, however, they

have spread increasingly into, first, medium-sized towns and more recently smaller suburban shopping centres. It is particularly the latter phenomenon that we wish to examine in some detail later on.

The reasons for the growth of multiple firms in retailing has been neatly summarised by Dawson (1982, pp. 82-84). He suggests five main reasons to account for their growth. First is a set of primarily financial reasons:- that is multiples have the financial potential for capital investment and hence an ability to buy into key locations. Interestingly, Hedderwick et al comment:

"in stockmarket terms retailing has remained one of the most highly rated sectors. Despite a few exceptions most large multiple groups are publically quoted UK Companies. These public companies in the retail sector experienced real volume growth of 98.6% between 1961 and 1978, far in excess of the 48.2% expansion in real GNP over the same period". (1979, p. 30).

Dawson's other reasons to account for the rise of the multiples are largely connected to the first. Thus he points to the organization scale economies in buying and warehousing, the opportunities for more efficient physical distribution systems, the capability of creating a corporate image for the customer and investment flexibility associated with their multi-locational character (that is, the ability to be price competitive at the right location)(Dawson, 1982).

What kinds of goods are multiples mostly associated with? The early growth in the multiples share of the market tended to be in the food trades. BCP (1978) note the early importance of food multiples, especially Lipton's and Maypole Dairy Co.. Dawson (1982) suggests that multiples are still more important in foods than non-foods, pointing out that in the UK throughout the 1960s there was a rapid growth in the multiple sector share of the food trades. By 1981 Hillier Parker (1981) suggest that 70% of grocery trade was in the hands of the multiples (though see Figure 2).

However, the important rise of the multiples in non-foods or comparison goods should also be highlighted. Guy (1980) suggests that

"the multiple firms selling mainly comparison goods appear more and more to be dominating British town centres. The nature of the goods sold helps to ensure that they are relatively free from competition by price reducing firms located in other types of shopping centre" (1980, p. 51)

This rise in the importance of non-food goods is highlighted by current figures for the percentage share of multiple groups in certain kinds of activity. For example, Hillier Parker (1981) suggest that 81% of the

FIGURE 2: Percentage share of the market by multiple groups

	<u>1966</u>	<u>1971</u>	<u>1976</u>
Clothing	50	54	64
Durable goods	39.7	45.4	50.6
Grocery	27	46.4	53.8 (70.0*)

Source: Hedderwick et al (1979)

* Hillier Parker estimate (1981).

television hire market was in the hands of the multiples, whilst in late 1983 the Economic Intelligence Unit (1983) reported that the market share of multiples in menswear was 65% and in footwear 66% (p. 25, 27). The overall picture is neatly summed up by Hedderwick et al (1979), though we should note the problem of variability amongst various sources (Figure 2).

For those firms involved in non-food retailing it is often difficult to locate in centres below a certain market threshold size. Comparison goods, or higher order goods to use classic central place terminology, require considerably larger catchment areas than food trades. For many firms it is only the largest centres which are therefore economically viable. When examining the spread of the multiples across Leeds it will be interesting to note those activities which are able to diffuse to smaller centres. Again the importance of the smaller more local multiples may well be critical. Cox in 1968 noted the potential for smaller suburban centres:

"the small multiple may find more congenial markets in secondary or suburban centres. Here rents and rates are lower than in town centres. There is no reason why secondary or even suburban locations need be less profitable for certain trades than locations in shopping centres in the middle of towns". (1968, p. 129).

Multiple Expansion in Leeds

It was suggested in the overview that the majority of multiple retailers were already well-established in the largest centres by 1965 (Hedderwick et al, 1979). Although expansion has occurred since then, Leeds generally has been no different in this respect. However, before looking at suburban expansion, it is worth noting briefly that the distribution of the multiple firms is far from uniform across the city centre. Data for 1983 illustrates the point well. In Figure 3 the percentage share of multiples is plotted for

FIGURE 3: Percentage multiple occupation of various city centre areas in Leeds, 1983

Central Briggate	83.33%	(18 outlets)
Northern Briggate	76.00%	(25 outlets)
Commercial Street	75.75%	(33 outlets)
Bond Street Shopping Centre	60.86%	(23 outlets)
Merrion Shopping Centre	53.84%	(52 outlets)
Boar Lane	32.55%	(43 outlets)
Market Street Arcade	18.18%	(11 outlets)
Southern Briggate	7.69%	(13 outlets)

NB: Vacant properties not included - see Figure 4 for locations.

various parts of the city centre (see Figure 4 for their locations).

The highest percentages are in the oldest sections of the city centre on Central and Northern Briggate and Commercial Street. Central Briggate records the highest value with 'Woolworths' and 'Marks and Spencers' proving to be key attractors. Around these stores are the more traditional regional comparison multiples dealing principally in jewellery, menswear, boutiques and footwear. Many of the multiple retailers in these areas have been in the same location since 1961 providing a great deal of stability in these retail environments. They have traditionally been areas where site rents have been the highest and where only the multiple group can afford to locate. Those independents which remain tend to occupy non-central sites and have a far greater tendency to vacate.

Next in the 'multiple hierarchy' in the city centre comes the two major enclosed shopping centres namely Bond Street (finished in the late 1970s) and the Merrion Centre (completed in the late 1960s). Both of these centres have begun to extend the retail heart of Leeds north and west, although the office sector provides a solid boundary to the west. This shift is likely to be accentuated when the new St. John's centre (see Figure 4) is completed over the next couple of years. The Bond Street centre is very new and has been most successful in attracting the newer multiple groups more closely associated with boutiques and ladies' fashion, whereas the Merrion Centre has by 1983 a far wider range of activities.

Outside these areas the share of multiples is far more variable. Boar Lane (see Figure 4) is rapidly becoming a 'fringe' rather than 'core' area especially since the redevelopment of the Bond and Albion Street complexes. Consequently Boar Lane has over the last twenty years, captured an increasing share of cafes and snack bars, cut-price stores, charity shops and fancy good stores. (The running down of formerly prosperous retail areas has been discovered elsewhere too, notably by Bennison and Davies (1980) following the opening of the Eldon Square shopping Centre in Newcastle.) Those multiples remaining on Boar Lane are concentrated close to Bond and Albion Streets and around 'British Home Stores'.

Similarly, the arcades of Leeds once boasted very fashionable shops and facilities but today are rapidly becoming more run-down and unpopular. Market Street Arcade (see Figure 4) now has low levels of multiple occupancy.

The most striking example of decay has occurred on Southern Briggate (see Figure 4), which in 1983 had only 8% of its outlets in the hands of the

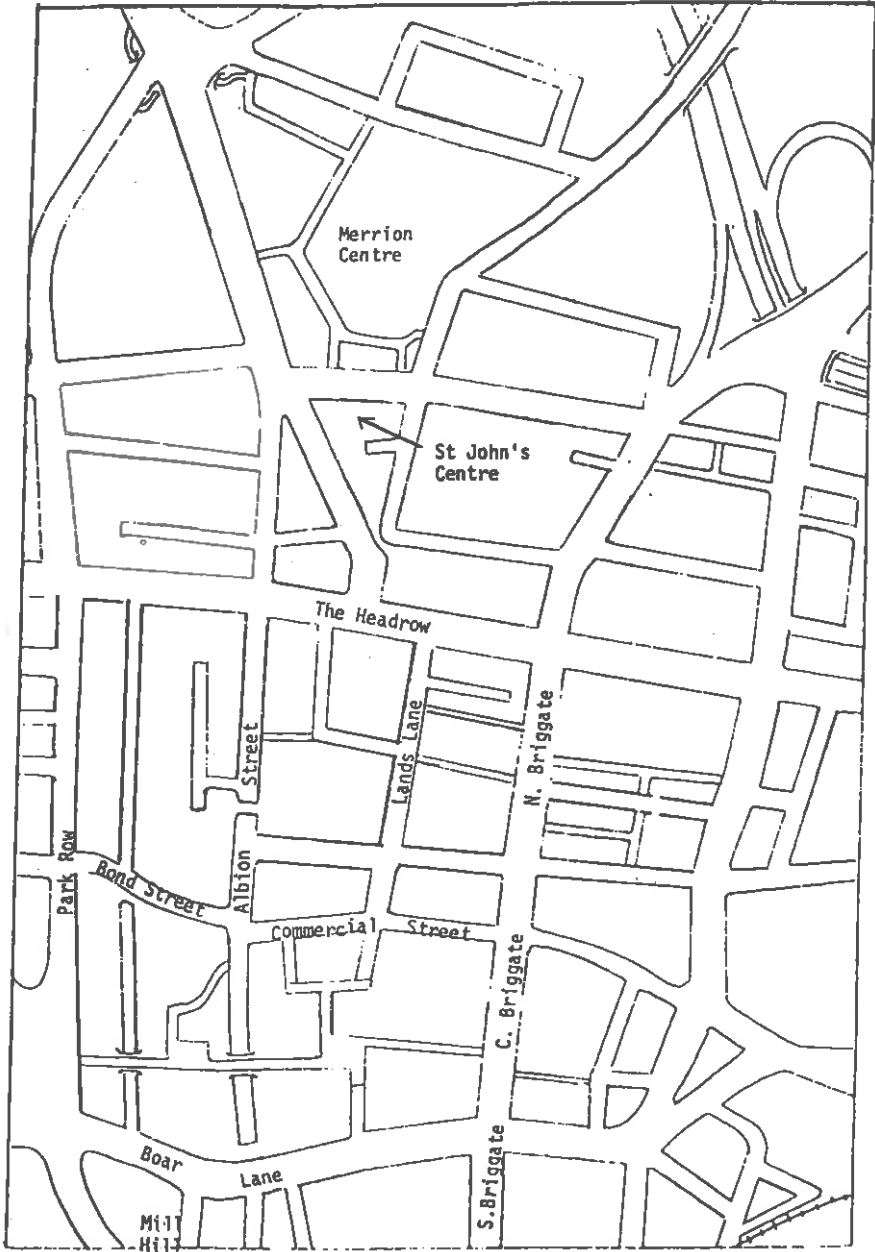


Figure 4 The retail heart of Leeds City

multiples. This compares to over 45% only eight years ago. Since then many outlets have been lost to the bulldozer as room has been made for make-shift car parks. Added to that has been the shift North and West which has caused many of the multiples to re-locate in areas of greater pedestrian flows. Consequently by 1983 six outlets were currently vacant.

Thus the market share of the multiples does vary across the city centre. Similarly the distribution of the multiples across suburbia is far from uniform and this is where attention now focuses.

The Suburban Expansion

The rise of the multiples across the suburban centres of Leeds since 1961 is plotted in Figure 5. These computer plots can be interpreted as follows: the suburban shopping centres of Leeds (see Appendix A for their location) have been exactly located on a square zoning grid. Data is fed into a computer graphics package (in this case 'Ginosurf') and the values are plotted in the form of three-dimensional peaks, the values here being the percentage of retail outlets in the hands of the multiples. Each peak is scaled within the package according to the largest value for all the time periods considered (Hunslet in 1983, Figure 5f). More details of the values of the multiple share of outlets for each centre are given in the individual graphs in Figure 6. (Figures 6i - 6viii are generally the largest multiple share of outlets, with over 40% in 1983. Conversely Figures 6xxv - 6xxxii, the smallest percentage share.)

In 1961 (Figure 5a) the suburban centres with the largest percentage of multiple occupancy were Pudsey (Figure 6iii), Meanwood (Figure 6xxii), Crossgates (Figure 6i) and Harehills (Figure 6iv). Generally these were amongst the largest suburban centres at this time (see Clarke and Macgill, 1984). By 1966 (Figure 5b) Seacroft (Figure 6ii) had emerged as an important centre for multiple traders (see below), otherwise the pattern was very similar to 1961. The most striking change however begins to occur after 1966, with the period 1966-1971 seeing a large increase in the number of multiple retailers in the suburban centres.

Clarke and Macgill (1984, p. 14-15) showed how important the retail phenomenon of the 'planned shopping centre' was in affecting the general hierarchy of centres between 1966 and 1971 and this largely accounts for the growing multiple presence. The 'district plan' concept, used by the Leeds Planning Authorities, meant that investment was concentrated in certain key centres. This led to the development of many new parades or small shopping

FIGURE 5: The growth of the multiples across Leeds 1961-1982

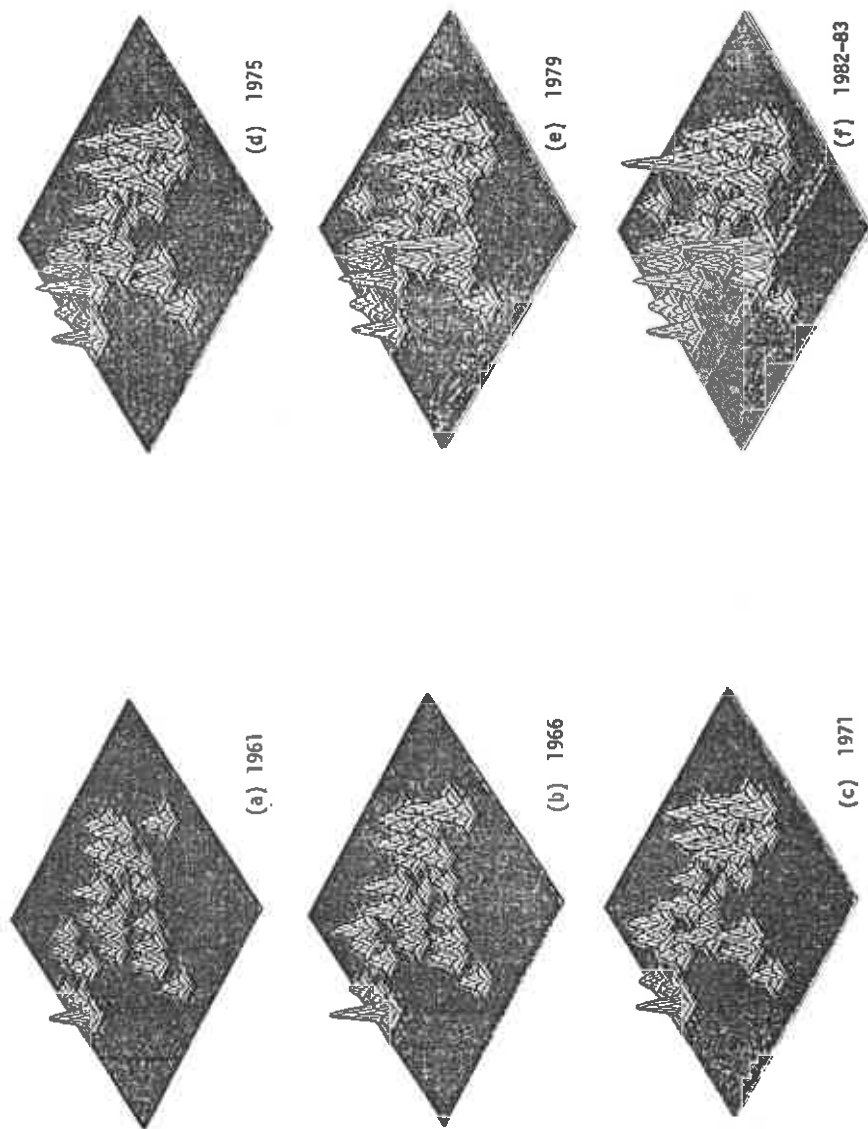
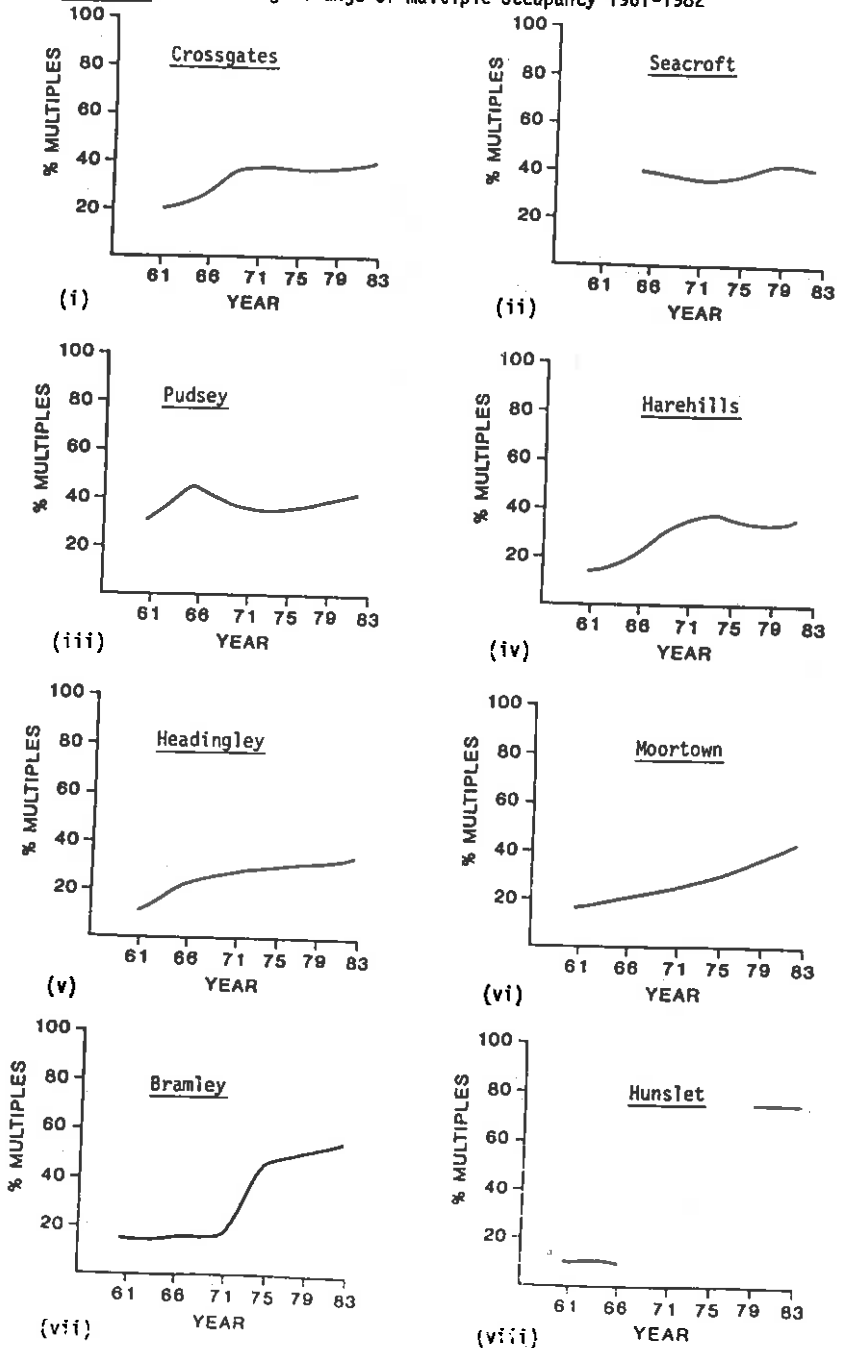
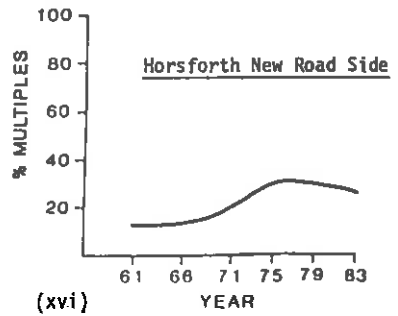
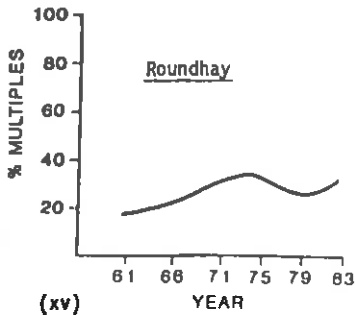
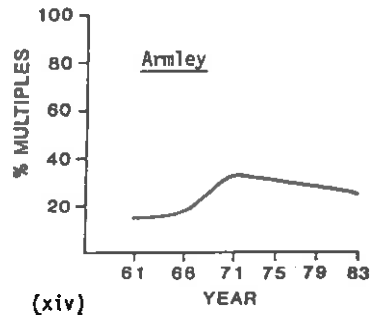
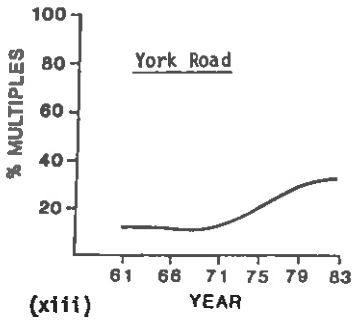
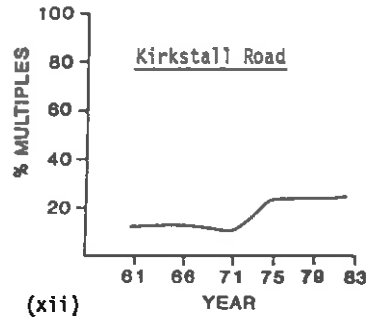
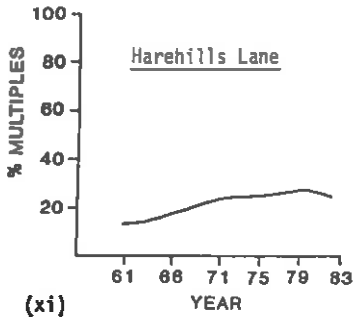
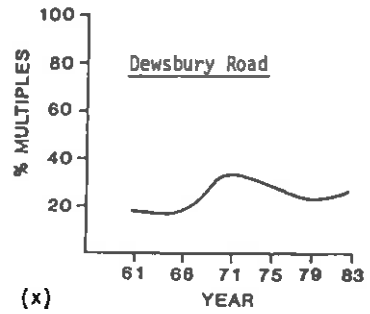
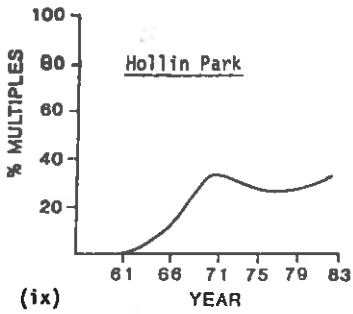
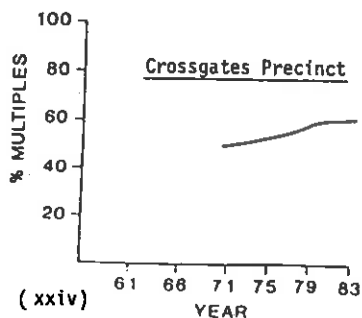
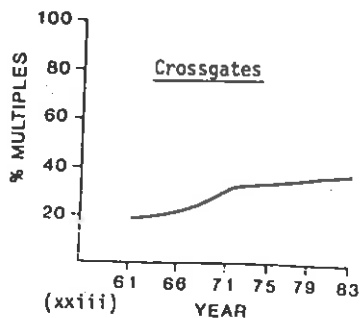
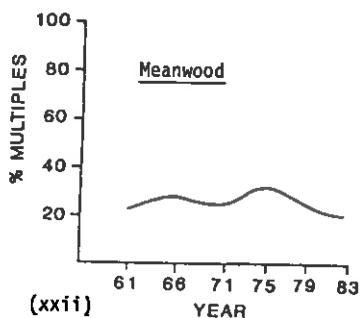
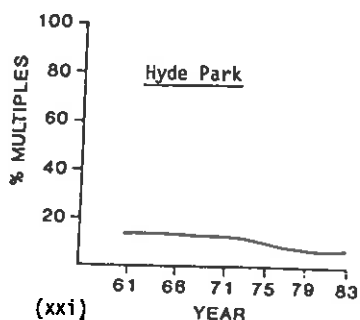
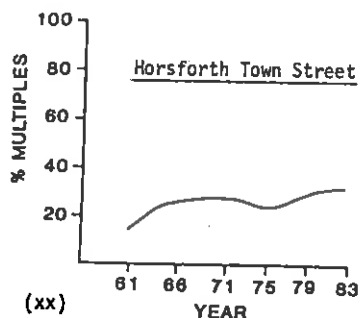
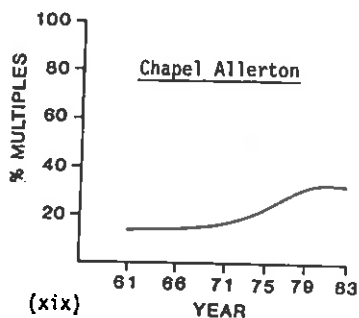
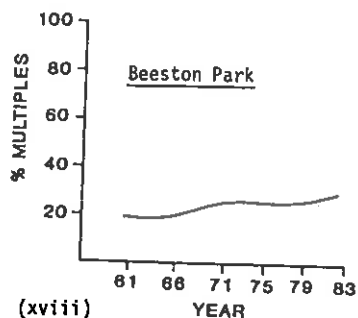
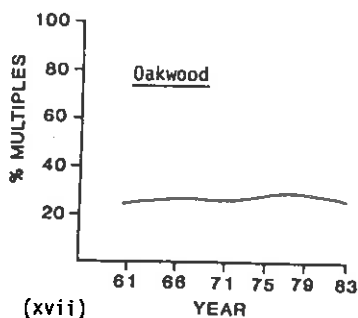
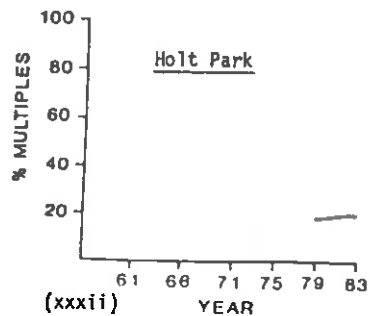
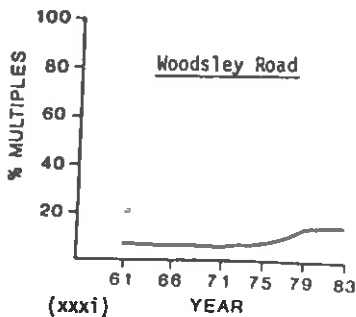
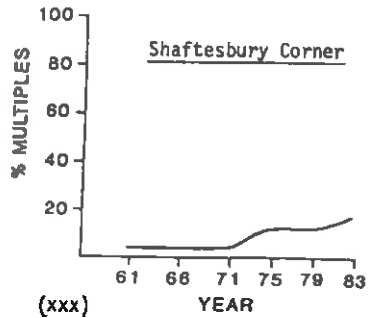
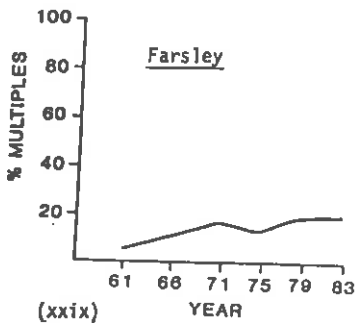
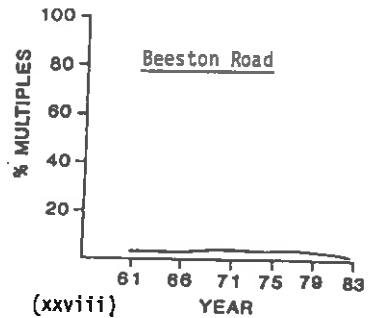
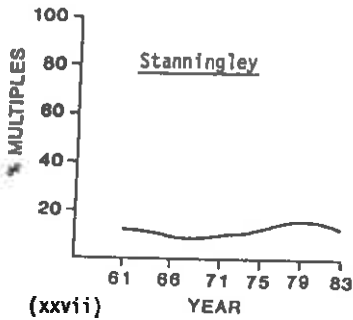
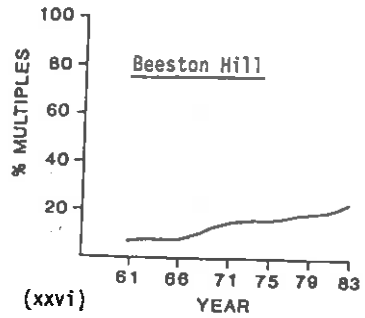
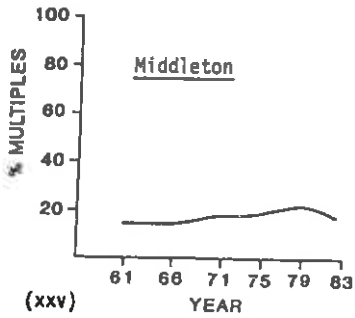


FIGURE 6: Percentage change of multiple occupancy 1961-1982









centres within the existing centres, normally sheltered from the elements.

Seacroft was a completely new purpose-built shopping centre whilst elsewhere Crossgates, Armley, Headingley, Horsforth Town Street, Pudsey and Chapel Allerton all benefited from new investment in retail properties (the most popular plans being the various 'Arndale Schemes'). Figures 5c and 6 (various individual graphs) show the growth in the total outlets of multiple trades within these centres, with increases of ten-fifteen per cent being common.

These kind of schemes were attractive to multiple groups since they were often carried out at the heart of the existing centres where pedestrian flows would be at a maximum. Very often new car-parking facilities and improved bus communications would also be provided. Similarly, the developers involved with the schemes were keen to attract multiple traders. Guy provides a neat synopsis:

"the developer will wish to seek assurances of the reliability of any potential tenant. This favours the established multiple firms, rather than the local man who possesses just one shop or who wants to start in retailing" (1980, p. 39).

Guy goes on to refer to the study by CALUS (1975) which reports that ten out of the fourteen precinct centres they surveyed (generally in larger centres) had over 80% of their total floorspace in the hands of multiple traders.

The concentration of multiple groups in these planned or extended centres is well-illustrated through the example of Crossgates. Figure 6xxiii shows the multiple share of outlets for all the shops in Crossgates Centre whilst Figure 6xxiv shows the share within the planned Arndale covered precinct. Between 1961 and 1983 the share of outlets in multiple hands increases from around twenty to forty per cent. By 1971, however, the multiple share in the precinct is already around 50%, increasing to 60% by 1983. This emphasises how much the precinct has dominated multiple growth in Crossgates.

Besides these new developments which encouraged greater multiple participation, there was by 1971 a general pattern of multiple growth in both the largest centres and the more affluent northern suburbs of the city. It has been in the northern wards of Leeds where the greatest increases in wealth have occurred and where the largest percentages of the higher social groups can be found (Clarke, 1984-B). The shopping centres in these more affluent northern wards have thus been seen as more favourable sites by multiple groups, especially those concerned with service or quasi-retail activities which were themselves expanding rapidly at this time (Clarke, 1984-A shows how the growth of service activities was dominantly in the northern suburbs,

especially for those involved with financial concerns, such as building societies, where the numbers of owner-occupiers was also greatest). It is not surprising then that areas such as Moortown (Figure 6vi), Roundhay (Figure 6xv) and Horsforth Town Street (Figure 6xx) began to acquire more multiple groups after 1966 (see Appendix A for their locations).

As Figure 5 shows this process of multiple expansion in the northern suburbs continues throughout the 1970s, indeed often in a snowball fashion: that is the presence of certain multiples attracts others who themselves attract others. This tends also to promote stagnation in the less-affluent centres. Thus Figure 5 and Figure 6 show the general lack of multiples in many of the southern centres, Middleton (Figure 6xxv), Beeston Road (Figure 6xxvii) and Beeston Hill (Figure 6xxvi), and the more immediate inner-city centres such as Woodsley Road (Figure 6xxx) and Hyde Park (Figure 6xxi). Hyde Park has actually seen a steady decline in the number of multiples as it has experienced massive local population decline and change and increasing competition from the growing centre of Headingley. Clarke (1984-8) notes how the attraction of these centres has further diminished by more recent economic recession and increased unemployment. This is also reflected in the lack of large numbers of multiples in many of the larger yet less affluent suburban centres. Clarke and Macgill (1984) showed that Armley, Kirkstall Road and Dewsbury Road for example, have been close to the top of the hierarchy of centres in recent times yet have always lacked a large number of multiple retailers.

• Nevertheless a few centres away from the more affluent northern suburbs have managed to attract a large number of multiples since 1971. By 1975 (Figure 5d) we see the important growth in the number of multiples in Bramley (Figure 6vii) and in Hunslet (Figure 6viii) by 1979 (Figure 5e). By 1979 the percentage of multiples in Bramley had reached fifty per cent and in Hunslet, seventy-five per cent. This phenomenal growth seems somewhat surprising at first given the general economic/social background and high levels of unemployment in these areas (Clarke, 1984-8). The reason has been a new form of planned centre, that of the superstore centre. (Note the gap in Figure 6viii for Hunslet. This arises because after 1966 (in our time periods considered) the area could no longer be classed as having a continuous shopping frontage and hence drops out of our study. It re-emerges with the new shopping centre in 1979).

Throughout the 1970s the Leeds Planning Authorities had been under

increasing pressure from the developers of hypermarkets and superstores to give planning permission for their large new stores. Following the Department of the Environment's Policy Note Thirteen, the Leeds Authorities decided upon a strict rule of not allowing free standing superstore developments. This forced superstore operators to develop 'district centres' rather than free-standing superstores and which consequently attracted a wide range of other retailing activities.

In Bramley and Hunslet the driving force behind the developments was W.M. Morrisons Ltd. As was seen earlier, developers in planned centres have been keen to attract multiple traders who in turn, in these centres, have seen the presence of a superstore (and associated benefits such as car parking facilities) as a major magnet for attracting customers. In Bramley and Hunslet this has added new life to retailing in two of the most depressed areas of Leeds. It is interesting to see a similar scheme recently underway in Middleton (under the control of Prestos).

Elsewhere Sainsbury's have acquired a green-field site on the ring road of North Leeds where again a planned centre, rather than single superstore, has been built and which is now attracting major multiples (Figure 5f - highest northern peak!). It is interesting however that Holt Park to the north, a planned centre with an ASDA superstore, has not yet acquired a large number of multiples. Poor layout and possibly increased competition caused by the Sainsbury's development has kept the multiples away.

The final pattern therefore by 1983 (Figure 5f) shows high multiple share of outlets in the largest suburban centres, Harehills, Pudsey, Crossgates, Headingley, Horsforth, the more affluent northern suburbs, Moortown, Roundhay, Sainsbury's Moortown, and the planned superstore developments at Bramley and Hunslet.

Multiple Diffusion: some examples

Having looked at the overall increase in the multiple's share of outlets across the shopping centres of Leeds it is now worth considering the diffusion of a selection of certain multiple firms, which in fact highlights and confirms many of the issues raised in the previous sections.

The national or nationwide diffusion of individual multiple firms has been discussed in a number of studies. Jefferys (1954) provides a neat commentary on the historical development and diffusion of many early retail multiples, whilst Boswell (1969), for Sainsburys, Corina (1971) for Tesco,

and Mathias (1967) for Allied Suppliers, have looked in more detail at some of the largest multiples. Scott (1970) also looks at a wide range of firms, particularly Timpsons and Alexandres (a Leeds based firm!) and two competing jewellery firms. Yet, few studies have particularly looked at the expansion of various firms across the city as distinct from the country as a whole. Thorpe and Rhodes (1966) perhaps comes the closest, examining the distribution pattern of Allied Suppliers and Moores Stores for the Tyneside region.

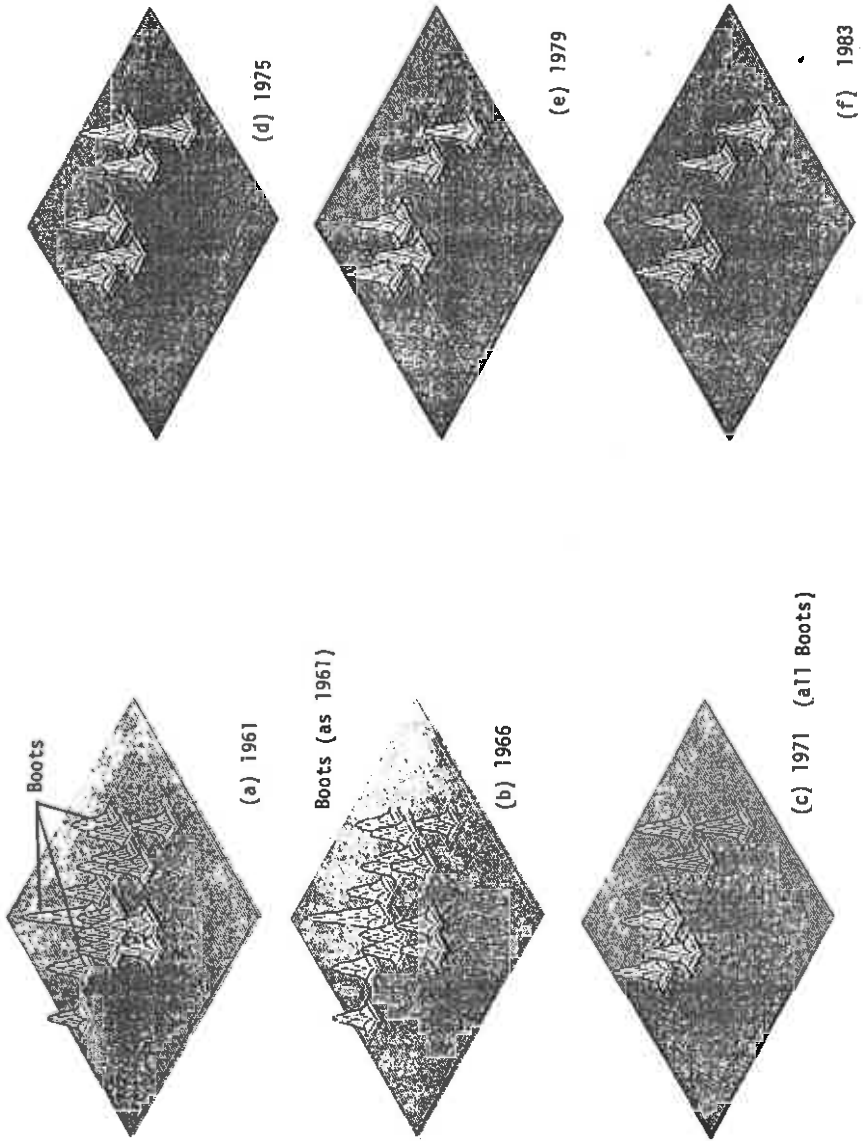
Timothy Whites and Boots provide good examples of firms well-established in Leeds by 1961. Both firms had similar merchandise on offer yet had very different beginnings. Jesse Boot took over his mother's shop in Goose Green, Nottingham in 1877 under the banner, "J. Boot, Drugs and Proprietary Articles at Reduced Prices" (Jefferys, 1954, p. 388), whilst Timothy White began business in Portsmouth, starting with a ships' chandler and general store in 1848 (Jefferys, 1954, p. 385). Boots were one of the few companies to grow purely by opening new branches: by 1914 there were 550 stores and by 1945, 1170. During the same period Timothy Whites were also expanding rapidly and in 1934 merged with another large company, Taylors Ltd. of Leeds and Yorkshire.

Figure 7 shows the suburban distribution of Timothy Whites and Boots in Leeds. In the 1960s (Figures 7a, 7b) Timothy Whites were one of the largest multiple groups in Leeds (in terms of number of outlets) having thirteen branches fairly well distributed across the city. Boots had only three suburban stores, at Headingley, Armley and Roundhay. In 1968, however, Timothy Whites were taken over by Boots who immediately undertook a programme of rationalization (not only in Leeds but nationwide: see BCP (1978)). By 1971 then, Figure 7c, only six stores remain in the network. Those stores retained by Boots were simply those in the largest centres, reflecting a firm marketing policy. Interestingly Pope (1980) described the thirteen branch closures of Boots after 1969 in Manchester, as a mixture of compulsory purchases and 'unsatisfactory trading conditions usually associated with a small shopping group'. Cox (1968) also notes in regard to Boots that,

"a survey prepared for the Company in the mid 1950s showed that floor area was the only limiting factor on the firm's sales ... The same firm, however, does not appear ready to go into 'really secondary developments' which it presumably leaves to National Pharmaceutical Union Members" (p. 126).

The pattern of Boot's stores has changed little then since 1971 (Figures 7d, 7e, 7f).

FIGURE 7: The suburban distribution of Timothy Whites and Boots



By 1981 Hillier Parker (1981) had noted that, "among the retail multiples, top of the league is Dewhurst the butchers" (p. 4). Dewhursts too are a well-established firm with its major growth period occurring in the inter-war years:- BCP notes the arrival of Dewhursts' in Benwell in 1930, by which time they were part of a national chain of retail butchers.

Unlike Timothy Whites or Boots however, the number of Dewhursts' branches in Leeds has grown since 1961. Figure 8 shows the progressive expansion of branches across Leeds since 1961. Most striking is the concentration in North Leeds, discussed in the previous section, although in 1979 Dewhursts did move into the new shopping centre at Hunslet. Clearly it has been the nature of the product sold which has enabled Dewhursts to build-up such a widespread number of outlets.

Hillier Parker (1981) also noted that the fastest sustained rate of growth of any of the major groups of multiples has come from the building societies. They have expanded their branch networks at around ten percent per year since 1970. The growth of building society branches in Leeds is documented more fully in Clarke (1984-A) but is worth briefly considering here because of their importance in terms of multiple groups. Figure 9 plots the suburban rise of one local firm, the Leeds and Holbeck. From only three sites in 1961 it has expanded rapidly to eighteen by 1983. It is again worth quoting Woolin (1983) (cited in Clarke, 1984-A) who sums up the reasons why expansion into suburban locations is an essential part of his company's policy:

"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 across 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".

Other more non-local building societies have also expanded rapidly across the centres of Leeds (again see Clarke, 1984-A).

Finally, it is interesting to very briefly look at how a multiple group can 'emerge' - that is, grow from a single outlet to a number of stores more widely scattered. An excellent recent example is that of Paul Madeley's

FIGURE 8: The growth of Dewhursts across Leeds, 1961-1983

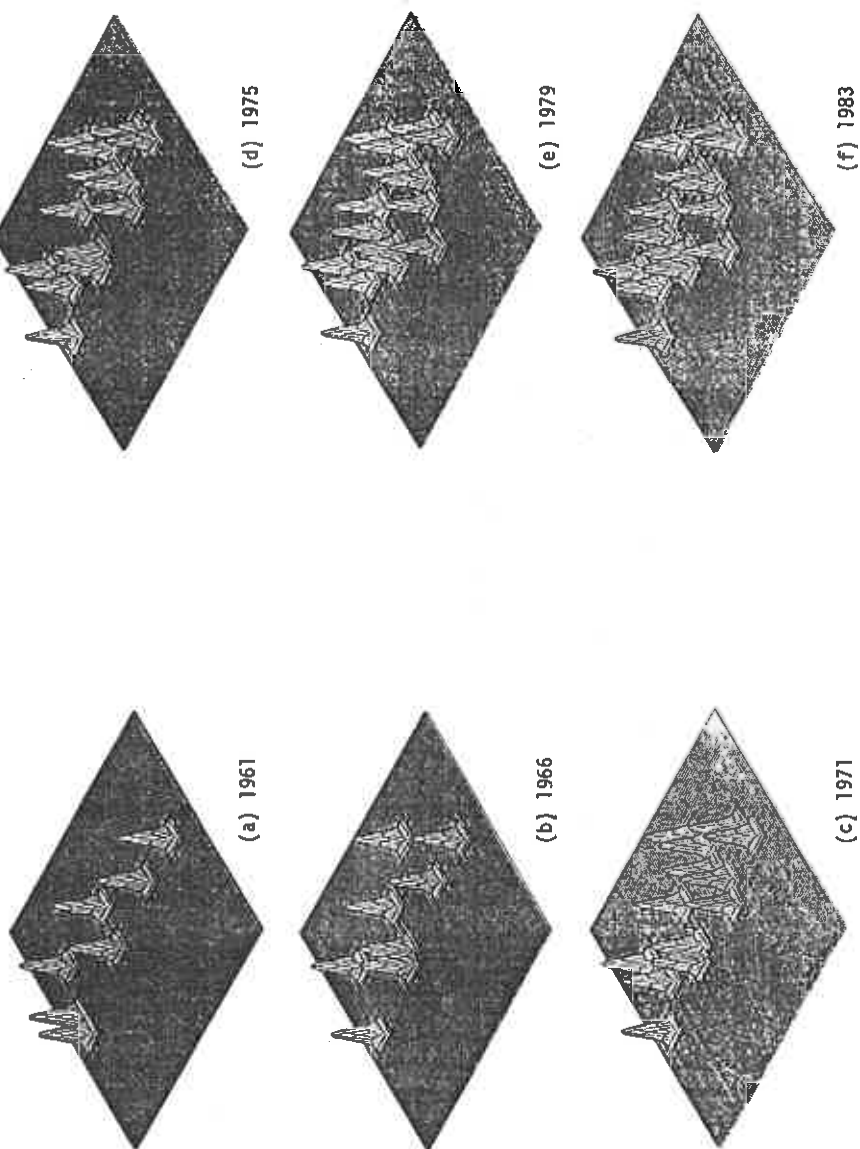
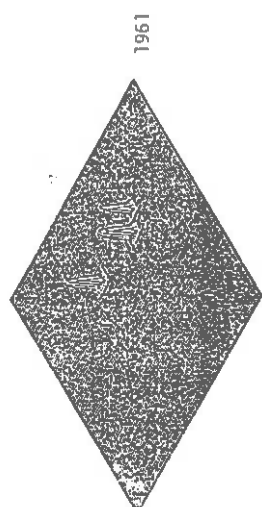
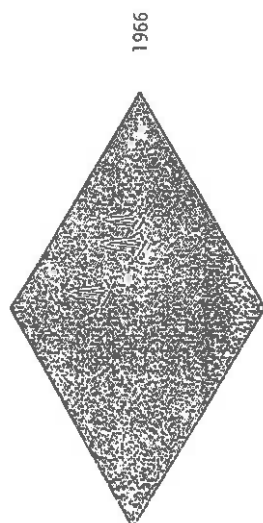
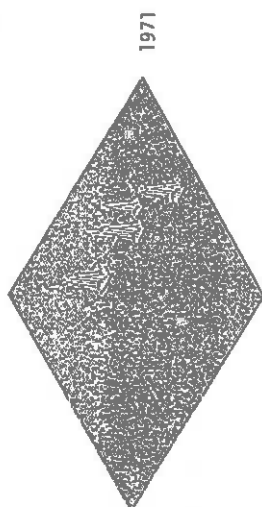
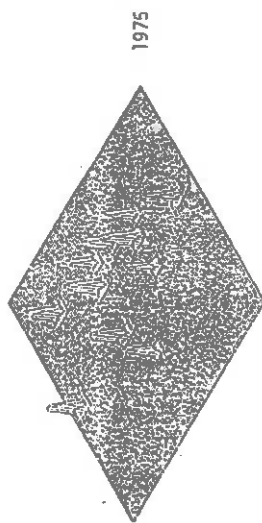
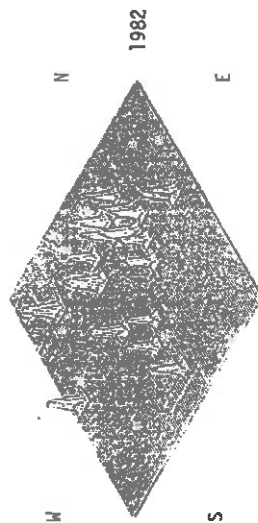


FIGURE 9:

The suburban expansion of the Leeds and Holbeck Building Society

(from Clarke, 1984-A)



D.I.Y. stores, the growth of which is plotted in Figure 10. From a single outlet in 1971 the business had grown to seven stores in Leeds by 1979, with a number of other stores outside the city itself, clearly providing an important contribution to D.I.Y. retailing in Leeds.

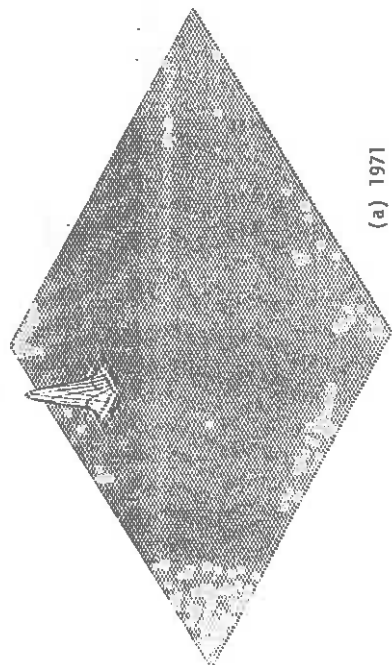
Conclusion

This paper has been concerned with the expansion and diffusion of the multiple firm in retailing across the city rather than the country as a whole. A flavour of the overall change and a number of individual case-studies have been presented. Within these case-studies the importance of either fast-moving every-day items or new innovative activities (building societies, D.I.Y. products) has been apparent. But what of the future? Hedderwick et al (1979) comment:

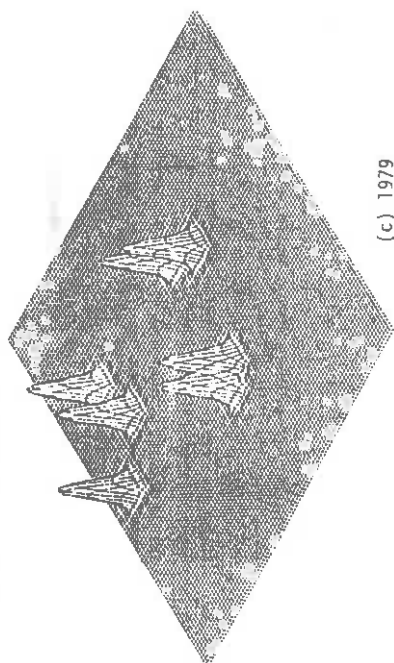
"The multiple organization with its strict insistence upon systems and rapid stock-turn is ideally suited to selling fast moving every-day items, but is not so good at catering for more discretionary demand. Here independents and department stores come back into their own ... If they are going to sustain their capture of market share they are going to have to be much more adept at catering for discretionary tastes - not an easy thing to do given the limits imposed by their strict adherence to systems" (1979, p. 32).

The next twenty years of retail change should provide as much interest as the last.

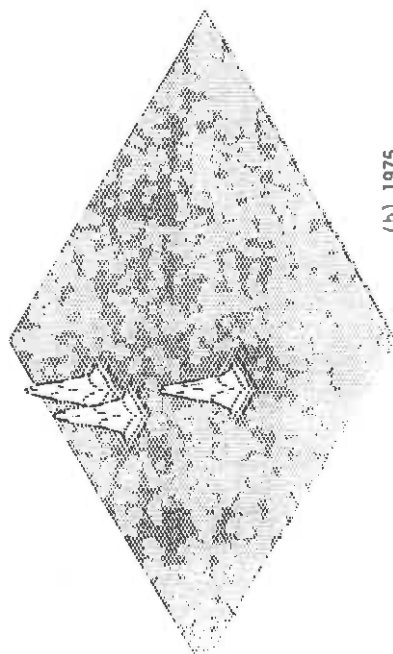
FIGURE 10: The rise of Paul Madeley's D.I.Y. outlets in Leeds, 1971-1983.



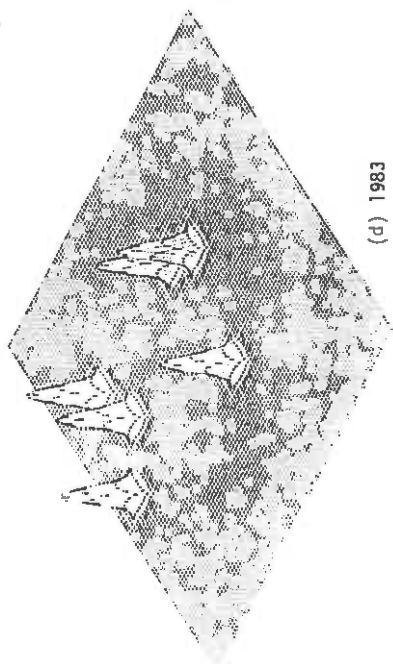
(a) 1971



(c) 1979



(b) 1975

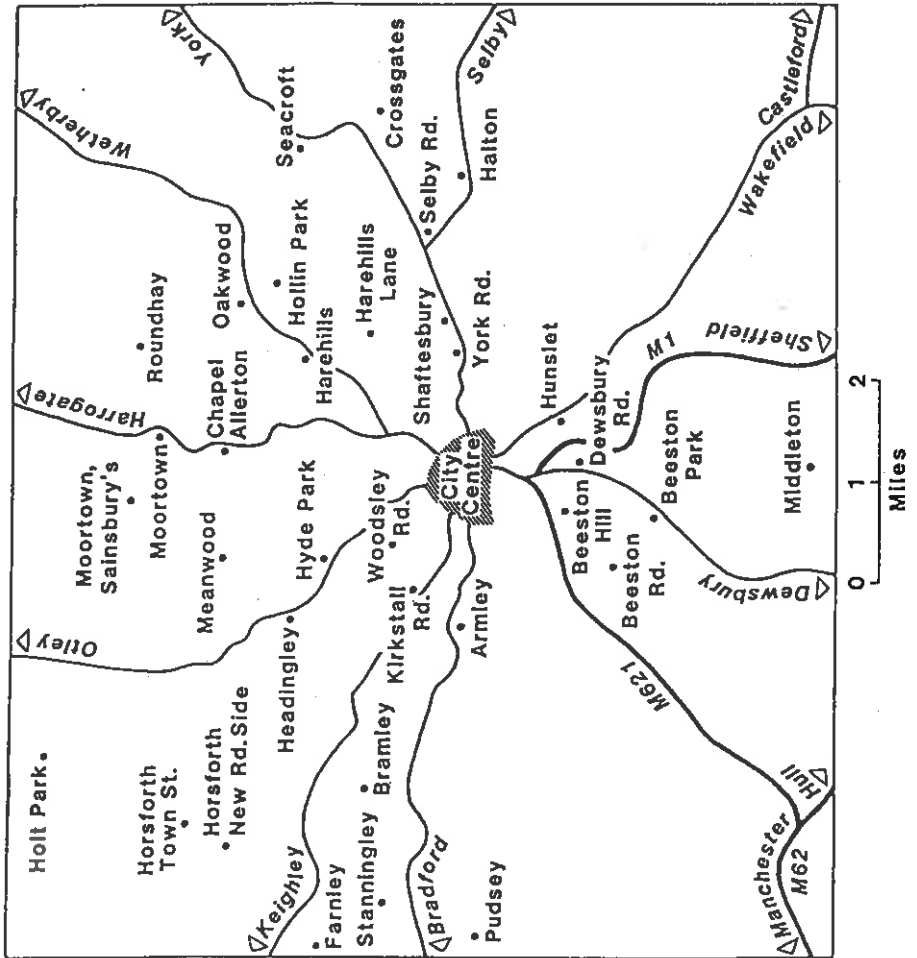


(d) 1983

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