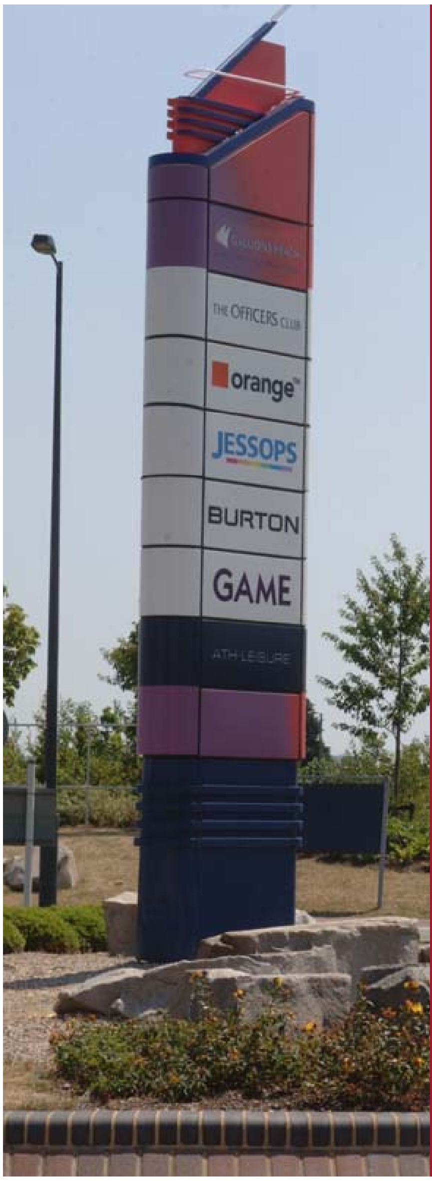
GLAECONOMICS

Retail in London: Working Paper H

London's Retail Trends - 1971-2000

April 2006



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For more information about this publication, please contact:
GLA Economics
telephone 020 7983 4922
email glaeconomics@london.gov.uk

GLA Economics provides expert advice and analysis on London's economy and the economic issues facing the capital. Data and analysis from GLA Economics form a basis for the policy and investment decisions facing the Mayor of London and the GLA group. The unit is funded by the Greater London Authority, Transport for London and the London Development Agency.

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Executive summary

This paper forms part of the wider GLA Economics study of the retail sector in London. It is based on an analysis of statistics from the 1971 Census of Distribution and Other Services and the Office of the Deputy Prime Minister's Town Centre Statistics of 2000.

Grocery (Convenience) retail employment

Convenience retail stores are those that sell food, drink, tobacco, household goods and newspapers/magazines. In this paper, the more familiar term of *grocery retail* is used to describe convenience retail.

Grocery retail employment in London declined by 21 per cent between 1971 and 2000.

There was very little variation across sub-regions of London. Inner London had a slightly lower decline than Outer London but the difference was not large. Additionally, the declines in employment across the North, South, East and West sub-regions were broadly alike.

The only notable exception to this trend was that Central London increased its grocery employment over the study period in contrast to the declines seen elsewhere in London.

There was no discernible shift in grocery retail employment between the 95 town centres surveyed in the study during the 1971 to 2000 period. Employment within these town centres fell at the same rate as total grocery retail employment for London as a whole.

However, it is possible that outside of these larger town centres shifts in grocery employment did occur, away from small local centres and into out-of-centre supermarkets and retail warehouses.

Indeed, the one factor that can be shown to have made a difference to the relative success or failure of a town centre in regards to grocery retail employment is its size. Large town centres are more likely to have increased employment levels and small town centres are most likely to have witnessed large decreases in employment levels.

Comparison retail employment

Comparison retail comprises clothing, footwear, household appliances (electric or gas), carpets, furniture, computers, books, music/videos, toys, DIY equipment, audio-visual equipment, sports equipment, and leisure goods.

Comparison retail employment in London increased by 12 per cent between 1971 and 2000.

The changes in employment were not distributed evenly across London. Instead there was a shift away from Inner London towards Outer London and the Central London ATCA.

There was also a shift away from East London, where employment declined, towards the other sub-regions of London, particularly the South and the West of London.

Town centres lost out to out-of-centre locations during the study period. Town centres (excluding the Central London ATCA) witnessed a 22 per cent decrease in employment whilst out-of-centre locations increased comparison retail employment by 75 per cent.

The decline in town-centre employment was orientated towards the smaller town centres which on average lost out to both larger town centres and out-of-centre locations.

The Central London ATCA did not share in the poor performance of many town centres. Instead, it increased employment over the study period by 16 per cent, above the average for London as a whole.

Service retail employment

Service retail includes travel agents, rental shops, hairdressers, launderettes and dry cleaners, mini cab offices, photography shops, and repair shops.

Due to a lack of 1971 data, it has not been possible to make comparisons of service retail employment for 1971 and 2000. Nevertheless, service retail is an important part of today's retail environment accounting for approximately 19 per cent of London's town centre (excluding Central London ATCA) retail employment in 2000 and 25 per cent of its retail employment overall.

Data for 2000 shows that there is more employment in service retail in Inner London than in Outer London. Additionally, service retail generally accounts for a higher share of retail employment in small town centres compared to large town centres.

When combined with the results of the comparison retail analysis, it seems likely that on average both Inner London (excluding Central London ATCA) and small town centres in general have seen some shift towards service retail alongside their decline in comparison retail employment over the study period. However, the lack of service retail data for 1971 makes this difficult to confirm.

Retail by London sub-region

The South has the greatest reliance on town-centres, with 53 per cent of its retail employment in town centres in 2000 against a 40 per cent average for London. The two largest retail centres in Outer London, Croydon and Kingston-Upon-Thames, are located in this sub-region. South London also has a greater share of employment in retail relative to its population in comparison to the North, West and East sub-regions of London.

West London is the sub-region which has the smallest share of its retail employment located in town centres (31 per cent). Overall, however, employment in retail is quite high in the region because relative to its population West London has a high share of employment in out-of-centre retail (including Heathrow Airport).

North London has seen retail employment increase sharply in Barnet (which includes Brent Cross shopping centre and a large number of town centres) between 1971 and 2000 but decline in its other three boroughs (Enfield, Haringey and Waltham Forest).

East London has the lowest share of retail employment relative to population out of the London sub-regions. It was also the worst performing of the London regions in terms of changes in retail employment between 1971 and 2000. These trends could be partly due to the emergence of Lakeside shopping centre in the early 1990's. However, the relatively less affluent nature of the sub-region is also a plausible explanation for these trends.

Examining the data on the basis of London's sub-regions misses some interesting results as regards Inner London. Thus, whilst comparison retail employment across London increased by 12 per cent between 1971 and 2000, Inner London (excluding Central London ATCA) saw employment decline by 12 per cent. Furthermore, ten of the fourteen Inner London boroughs witnessed declines in comparison retail employment over this period with the largest declines occurring in the South London boroughs of Lewisham and Lambeth

Despite this, retail employment as a share of population remains higher in Inner London (excluding Central London ATCA) than for Outer London. This is largely due to a greater amount of service retail jobs in Inner London compared to Outer London.

Background

In May 2004, the Office for the Deputy Prime Minister (ODPM) published a range of retail statistics for 2000 offering a reliable picture of the retail economy.

Prior to this, the last systematic collection of data about retail activity in London or the UK as a whole was in 1971. The development of the sector since this time has occurred in a vacuum of official information.

The 1971 figures are the last in a series of Censuses of Distribution and Other Services, taken in 1950, 1957, 1961, 1966 and 1971, which drew a comprehensive picture of retailing in Britain over this period.

The last full census in 1971 provided data on shopping areas in towns with population greater than 50,000 people across the UK, and for London it covered each borough, the City, and all towns in the region having a population of 20,000 or more.

Rather than undertake such a census again to address the lack of accurate retail data, the ODPM saw the opportunity to use its range of statistics for major town centres in England and Wales.

The purpose of this project, carried out by University College London's (UCL) Centre for Advanced Spatial Analysis (CASA) during 2004/05 for GLA Economics, was to compare the 1971 Census of Distribution with the recently released ODPM town centres data. This comparison was to provide a means of measuring the changes which have affected Greater London's retail economy during the last 30 years, since the last systematic survey of retailing in the capital was undertaken.

CASA provided a report to GLA Economics in 2005 together with spreadsheets of the comparable data from 1971 to 2000. This version of the report has been written by GLA Economics to build on the original report and provide additional analysis of the data. Therefore, this report includes some parts of the original report and some new analysis.

The original CASA report is available on its website[1].

[1] View: www.casa.ucl.ac.uk/working_papers/paper91.pdf

1. Introduction

The data analysis by CASA has enabled direct comparisons for employment and floorspace for each of the 33 London boroughs and for 100 of the key town centres across London.

For employment, the data comparing 1971 and 2000 is available for grocery retail and for comparison retail. No data, however, is available for comparing service retail as this sector was largely absent from the 1971 data.

Details of how CASA undertook the data analysis and overcame some of the problems this entailed are included in Appendix A.

In addition to presenting data comparing 1971 and 2000, this paper also makes use of the ODPM's town centre statistics for 2000 to provide a snapshot of the current structure of the retail sector in London. Thus, the report comments both on the structure of the retail sector in 2000 and on how it changed over the three previous decades.

On the subject of town centre data, in terms of retail within the West End and Central London the analysis focuses on an area termed the Central London Area of Town Centre Activity (ATCA), which is included as one of the 100 town centres in the analysis. This Central London ATCA includes the area commonly known as the West End, but additionally includes a number of neighbouring shopping areas, namely Victoria, Kings Road, Knightsbridge, South Kensington, Brompton Cross, Holborn, Liverpool Street, Leadenhall and Cheapside.

Within the report, analysis has been carried out to compare Inner London and Outer London. For Inner London, a problem is that the scale of retail in the Central London ATCA can skew the results such that trends in the remainder of Inner London remain hidden. Therefore, in most cases results for Inner London are presented with those of the Central London ATCA excluded. This allows a better indication of trends across the Inner London boroughs outside of the Central area, allowing an analysis of how retail across the remainder of Inner London is affected by its proximity to, and competition from, the West End and other Central London shopping areas.

Another area of interest considered is that of how different sub-regions of London differ in their retail offer and how that has changed between 1971 and 2000. The sub-regions used are:

- North – Barnet, Enfield, Haringey, Waltham Forest
- South – Bromley, Croydon, Kingston, Merton, Richmond, Sutton
- West – Brent, Ealing, Hammersmith & Fulham, Harrow, Hillingdon, Hounslow
- East – Barking and Dagenham, Bexley, City, Greenwich, Hackney, Havering, Lewisham. Newham, Redbridge, Tower Hamlets
- Central – Camden, Islington, Kensington and Chelsea, Lambeth, Southwark, Wandsworth, Westminster

Where Central London is being considered in this context, we have referred to it as the Central London sub-region in the report to distinguish it from the smaller Central London ATCA.

The paper begins by considering trends from 1971-2000 in grocery retail. This is followed by a section considering trends in comparison retail. The third section considers changes in retail floorspace.

Following this, the remainder of the report brings together some of the findings from these first three sections together with additional analysis based on the ODPM's 2000 town centre statistics. Thus, a brief snapshot of the current retail structure is provided followed by closer examination on a sub-regional basis examining each of the boroughs in turn.

Finally, the conclusions of the analysis are presented.

2. Grocery (convenience) retail employment

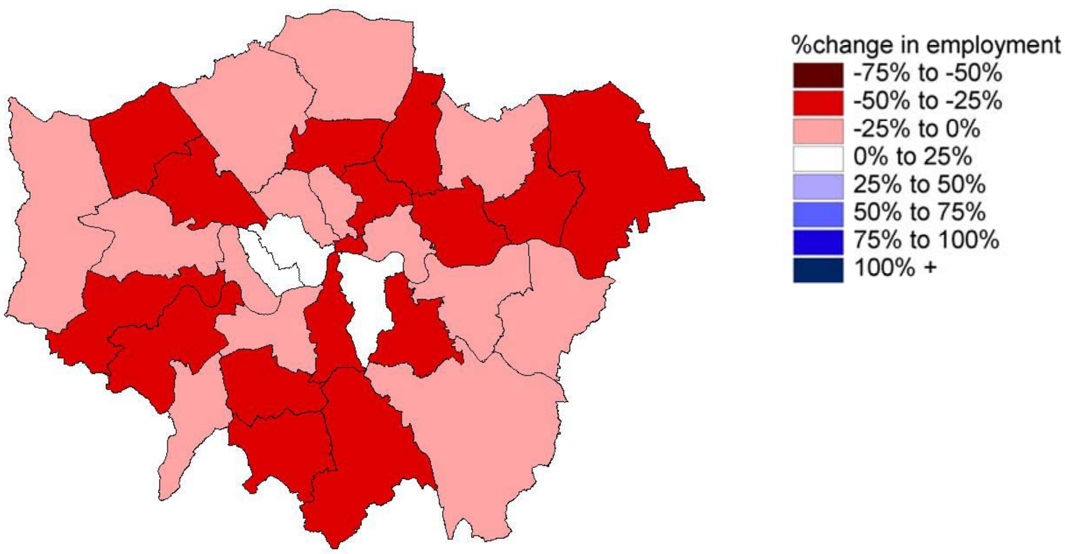
Convenience retail stores are those that sell food, drink, tobacco, household goods and newspapers/magazines. Supermarkets are the prime example of convenience stores selling all the above goods in one location. However, there are many smaller localised establishments selling some or all of the above goods on most high streets and in most local centres. In this paper, the more familiar term of grocery retail is used to describe convenience retail.

Overall, London witnessed a 21 per cent decrease in grocery retail employment between 1971 and 2000.

The changes at borough level can be seen in Figure 2.1. This shows that the number of people employed in grocery retail has fallen across Greater London in all except three boroughs. Fourteen boroughs have witnessed declines of 0-25 per cent and sixteen boroughs have seen declines of 25-50 per cent.

This change is not unexpected since the food sector in particular has been consolidated by a small number of large retailers over the past three decades with the supermarket increasingly replacing the corner shop. Relative to the floorspace occupied, fewer people are required to run modern stores than the traditional food store of the 1960s and 1970s.

Figure 2.1: Percentage change in grocery retail employment by borough, 1971-2000



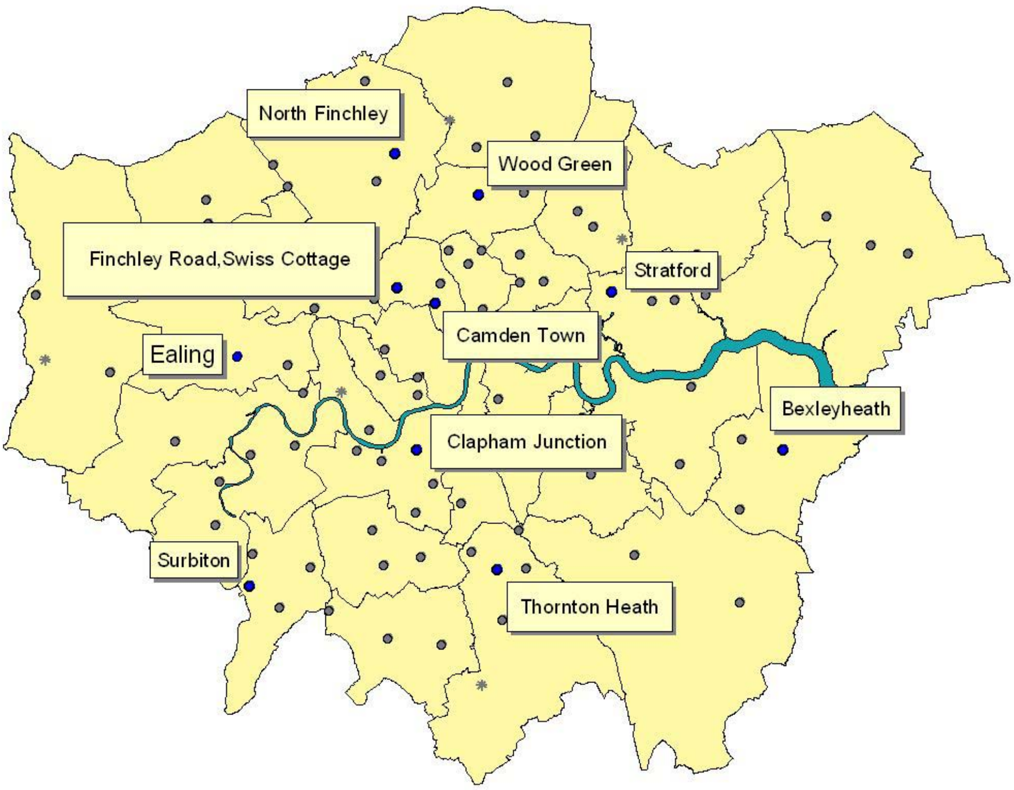
Source: CASA

Given this trend of decline in grocery employment, it is not surprising that of the 95 town centres which could be compared for grocery employment between 1971 and 2000 (the totals for five town centres were not disclosed in the 2000 series and thus could not be compared) only 24 had increased their employment levels.

In Figures 2.2 and 2.3 the ten best and worst performing of these town centres are identified in terms of grocery retail employment growth between 1971 and 2000.

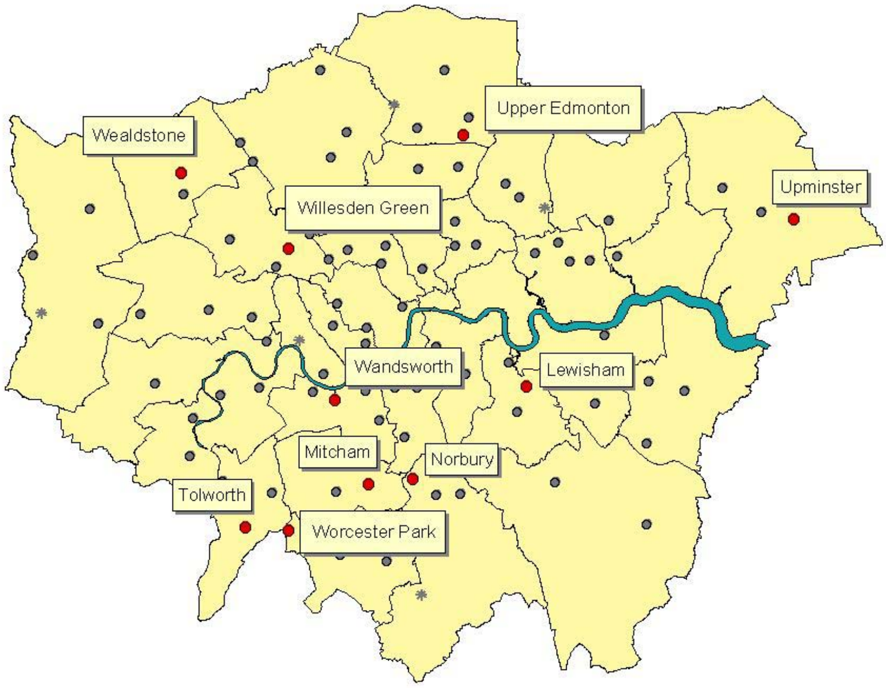
Figure 2.2 shows those town centres where grocery employment has increased most. None of these town centres fall within the three top boroughs identified in Figure 2.1. Stratford witnessed the biggest increase in grocery retailing between 1971 and 2000 with employment growing by over 500 per cent; Camden Town was next with an increase of more than 200 per cent.

Figure 2.2: Nine best performing town centres, grocery retail employment, 1971-2000



Source: CASA

Figure 2.3: Ten worst performing town centres, grocery retail employment, 1971-2000



Source: CASA

The growing centres highlighted in Figure 2.2 are spread fairly evenly across Greater London in both central and peripheral locations. When the distribution of the ten worst performing town centres (Figure 2.3), all of which have lost at least 78 per cent of grocery retail jobs, is considered, no discernible spatial pattern relative to their locations within Greater London can be seen. This suggests there are no spatial factors at work in explaining the location of the most successful and least successful centres.

This view is largely supported by Table 2.1 with the one exception that the table does show that Central London sub-region performed better than other London regions. This was largely because the borough of Westminster increased its grocery retail employment by seven per cent between 1971 and 2000.

Outside of Central London, however, the decline in grocery retail employment was broadly consistent across the rest of London with Outer London seeing a decline of 23 per cent and Inner London (excluding Central London ATCA) only faring slightly better with a 20 per cent decline. Furthermore, as Table 2.1 shows, the declines in grocery retail employment across the North, South, East and West regions were all broadly similar. As mentioned earlier, the average for London as a whole was a 21 per cent decline.

Table 2.1: Change in grocery retail employment in London by sub-region, 1971-2000

London region	Percentage change 1971 - 2000
North	-22
West	-22
South	-25
East	-29
Central	-6
Inner	-18
Inner (excl Central London ATCA)	-20
Outer	-23
Total	**-21**

Source: GLA Economics based on CASA data

Given that the geographical location of a town centre appears to have had little impact on its relative change in grocery retail employment over the study period, then other factors must exist to explain why some town centres have performed well and others have not. Such factors may include demographic changes in the immediate catchment populations, or indeed deterioration in the quality of the retail stock in these town centres. The size of the town centre also has an effect.

Analysis of the data for 1971 and 2000 allows the share of total employment across London that lies within the 95 town centres to be calculated. From this analysis any shifts in employment towards or away from these centres can be highlighted. Surprisingly, this analysis shows that there has not been any shift away from the 95 town centres studied for grocery retail employment over the study period.

Instead, as shown in Table 2.2, the difference between the loss of retail employment across the 95 town centres and that across London as a whole is negligible. In other words, employment in the grocery retail sector was not lost from these town centres to out-of-centre locations through the study period. Instead, the town centres studied and out-of-centre locations shared equally in the decline in employment in this sector.

Table 2.2: Changes in town centre grocery retail employment, 1971-2000

Total London	Town centres (including Central London ATCA)	Town centres (excluding Central London ATCA)
-21 %	-22 %	-22 %

Source: GLA Economics based on CASA data

This is a slightly surprising result given that consumer demand for time-saving, car-accessible food shopping, coupled with retailers' own preference for easily-managed free-standing stores, gave rise to massive growth in out-of-town supermarkets in the 1970s. It may be partially explained by the fact that within London many supermarkets continue to be located within town centres, together with the fact that there remain many smaller grocery stores, such as newsagents and off-licences in town centre locations.

There may also have been some shifts in grocery retail employment that do not show up in Table 2.2. For example, back in 1971 there was only limited out-of-town retailing but there was substantial grocery retail in smaller town centres (that are too small to have been included in the 95 studied). Thus, grocery employment in 1971, outside of the 95 town centres, will have been predominately made up of shops in smaller town centres, and little parades. By comparison, grocery employment in 2000, outside of the 95 town centres, will have been largely out-of-centre superstores and retail warehousing.

Thus, the fact that Table 2.2 shows employment in off-centre locations declined at the same rate as the bigger town centres perhaps hides the fact that retail outside of the town centres studied changed over the study period from being located in smaller centres, which will therefore have witnessed significant job losses, to being located in out-of-centre supermarkets and retail warehouses.

This argument gains some support from Table 2.3 which shows that amongst the 95 town centres that were studied one factor that can be shown to have had an influence on determining the performance of a town centre and its grocery retail employment levels is the size of that centre.

For Table 2.3, the 95 town centres have been split into three groups according to the amount of A1 floorspace [d1]in each centre in 1971. Thus, there is one group of 'large' town centres consisting of those that had A1 floorspace above 29,000 m^2 in 1971; a group of 'medium-sized' town centres where A1 floorspace in 1971 was between 17,000-29,000 m^2 and finally a group of 'small' town centres where A1 floorspace in 1971 was below 17,000 m^2.

The overall loss in grocery retail employment across all the town centres in the study was 21 per cent. However, as Table 2.3 shows, employment across the 'large' town centres only declined by 15 per cent compared to a 21 per cent decline across the 'medium' town centres and a 38 per cent decline across the 'small' town centres.

Therefore, the size of a centre does appear to be a contributory factor in determining the relative success of a town centre in terms of grocery retail employment between 1971 and 2000. This is a result repeated for comparison retail (see next section).

Table 2.3: Changes in grocery employment in town centres by size, 1971-2000

Size of town centre (1971, A1 floorspace)	Average change in grocery employment 1971-2000
'large' (>29,000 m^2)	-15 %
'medium' (17,000 – 29,000 m^2)	-21 %
'small' (<17,000 m^2)	-38 %

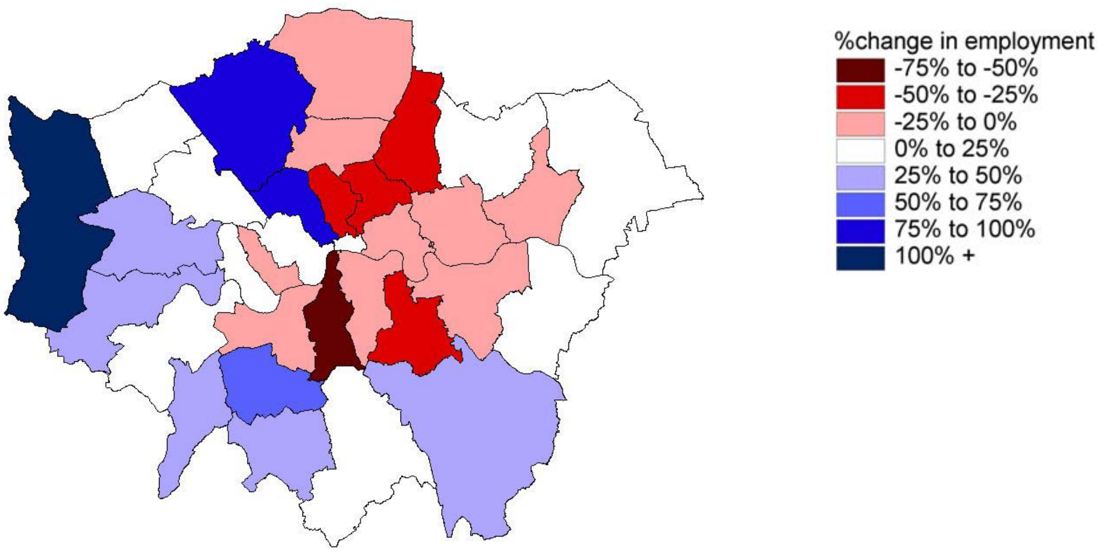
Source: GLA Economics based on CASA data

3. Comparison retail employment

Comparison retail comprises clothing, footwear, household appliances (electric or gas), carpets, furniture, computers, books, music/videos, toys, DIY equipment, audio-visual equipment, sports equipment, and leisure goods.

Figure 3.1 shows the change in comparison retail employment between 1971 and 2000 by borough. It shows a more mixed pattern than was the case for grocery retail. In the case of comparison retail it can be seen that some boroughs (largely in the Western half of London) increased employment levels over this period whilst other boroughs (largely in the Eastern half of London) had declining employment levels.

Figure 3.1: Percentage change in comparison retail employment by borough, 1971-2000



Source: CASA

Across London as a whole, comparison retail employment increased by 12 per cent, in contrast to the 21 per cent decline in grocery retail employment.

However, as suggested by Figure 3.1, this improvement in comparison retail employment was not spread evenly across London. Instead, as shown in Table 3.1, some areas performed better than others.

West London witnessed a 38 per cent increase in comparison retail employment over the 1971-2000 period. This was due mostly to growth in Hillingdon, which in turn will have been mostly due to the expansion of Heathrow Airport during this period. If Hillingdon is excluded (to remove the Heathrow effect), the growth in the remainder of West London was 19 per cent during this period, slightly below that of South London which had growth in comparison retail employment of 25 per cent over this period led by the boroughs of Merton, Bromley and Sutton.

Table 3.1: Change in comparison retail employment in London by sub-region, 1971-2000

London Region	Percentage change 1971 - 2000
North	15
West	38
South	25
East	-8
Central	7
Inner	1
Inner (excluding Central London ATCA)	-12
Outer	25
Total	**12**

Source: GLA Economics based on CASA data

In North London, employment in comparison retail increased by 15 per cent between 1971-2000. However, this hides the fact that employment almost doubled in Barnet (home of Brent Cross and a high number of town centres) but declined in the other three boroughs.

In East London, comparison retail employment actually declined over the study period by eight per cent with Lewisham, Hackney, Newham, Greenwich, Tower Hamlets, and Barking and Dagenham all witnessing reduced employment levels.

As shown in Table 3.1, the Central London sub-region performed below the average for London overall. However, this hides the fact that the Central London ATCA performed well, whilst most Inner London boroughs performed badly. Thus, the Central London ATCA increased comparison retail employment by 16 per cent between 1971 and 2000. However, Inner London (excluding Central London ATCA) saw comparison retail employment decline 12 per cent.

Two results suggest themselves from this analysis. Firstly, there has been a shift in comparison retail away from inner London boroughs (excluding Central London ATCA) to either the Central London ATCA or Outer London (or both) during the study period.

Secondly, the data suggests there has been a shift in comparison retail away from the East of London towards other areas of the city in particularly the South and West of London.

Figure 3.2 shows the location of the ten best performing town centres in terms of comparison retail employment. The centres are located across much of London, but not in the North-East of the city. This is in line with the lack of overall growth in the East region highlighted in Table 3.1.

Figure 3.2: Best performing town centres, comparison retail employment, 1971-2000

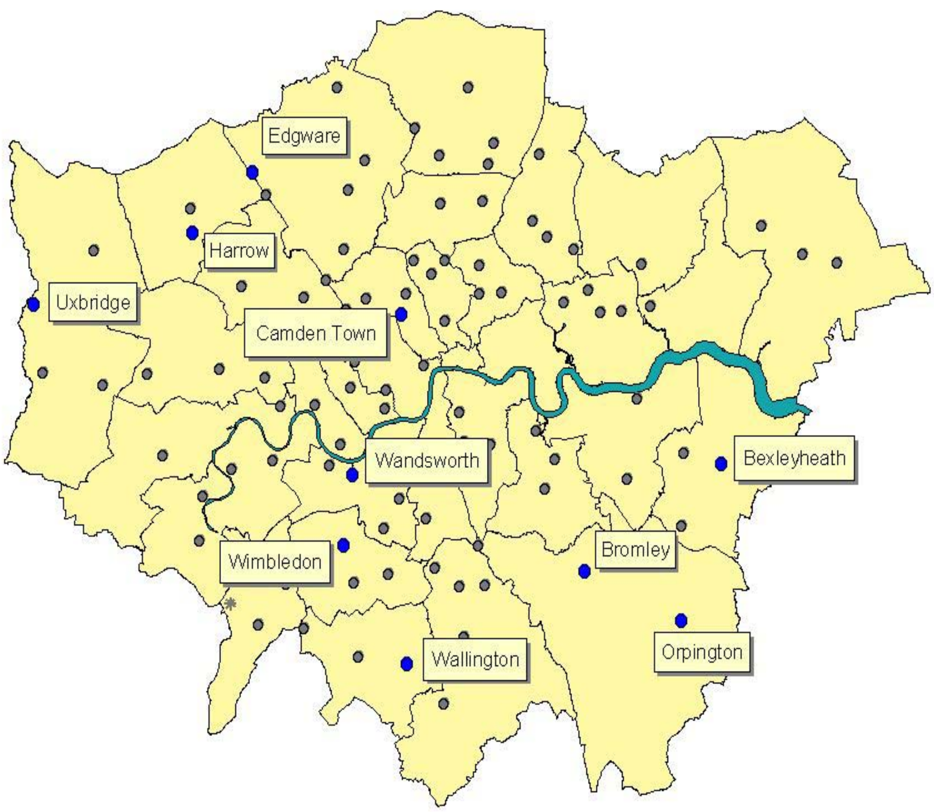
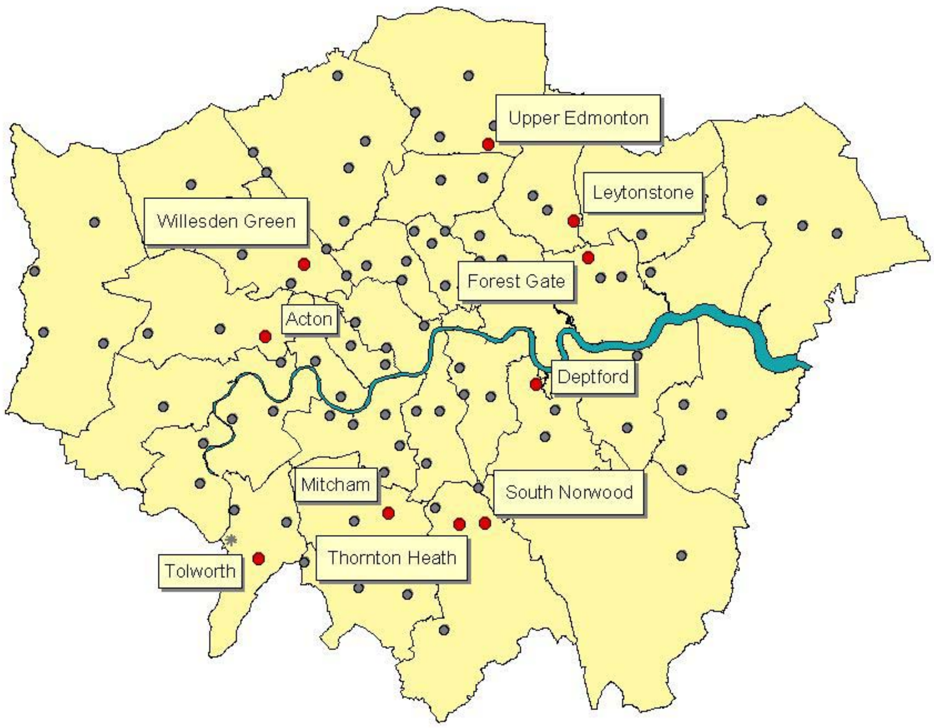


Figure 3.3: Ten worst performing town centres, comparison retail employment, 1971-2000



Source: CASA

Figure 3.3 shows the worst performing town centres for comparison retail employment. Four of them are located in the South sub-region despite this being one of the more successful regions in terms of increasing comparison retail employment. There are a number of explanations for this. One is that large centres have tended to perform better than small centres, and it is noticeable in Figure 3.3 that the worst performing town centres are mostly small centres. Another reason is that town centres have lost comparison retail employment to out-of-centre locations. (These two trends are examined in the next two sections). The worst performing centres are therefore likely to be small centres who have lost market share to either larger town centres, or out-of-centre locations, or both.

Shift away from town centres in comparison retail employment

As shown earlier, London's major town centres maintained a constant share of grocery retail between 1971 and 2000. However, there is evidence that they lost a significant share of comparison retail to non-town centre locations over the same period.

Table 3.2 illustrates this point. It shows how for comparison retail the amount of employment in the 100 town centres in this study compares to the amount of employment across London as a whole.

Whilst London as a whole witnessed a 12 per cent increase in employment in this sector, the town centres included in this study witnessed an overall decline in comparison retail employment of nine per cent. This clearly indicates that there was a significant rise in comparison retail employment in non-town centre locations between 1971 and 2000.

Indeed, this increase in out-of-centre comparison retail employment totalled 75 per cent over the study period, increasing the out-of-centre share of comparison retail employment up from 25 per cent in 1971 to 39 per cent in 2000.

Table 3.2: Changes in town centre comparison retail employment, 1971-2000

Total London	Town centres (including Central London ATCA)	Town centres (excluding Central London ATCA)
12 %	-9 %	-22 %

Source: GLA Economics based on CASA data

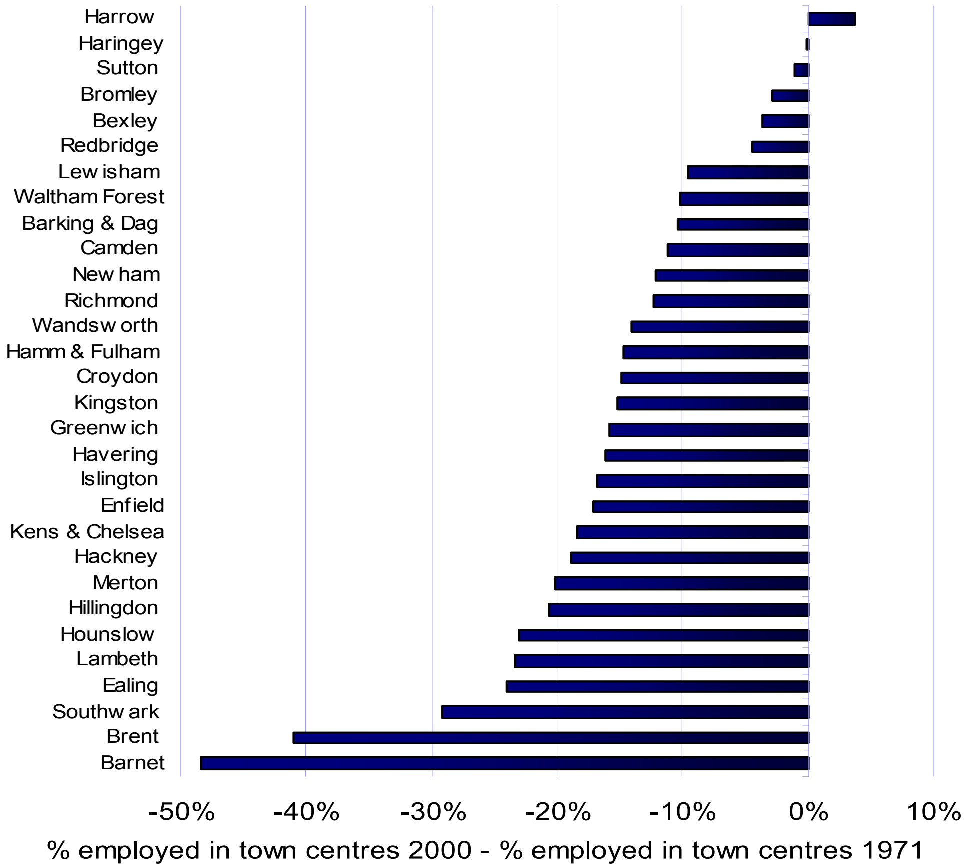
With the exception of Brent Cross, there have not been any out-of-centre shopping centres built within London (although Heathrow which is classed out-of-centre in this analysis had a large increase in retail employment over the study period). Therefore, the main explanation for the growth in non-town centre retail employment must come from the emergence over this period of retail warehouses and retail warehouse parks. Whilst these have not grown within London to such an extent as elsewhere in the UK, they have nevertheless been introduced in many locations and this employment data suggests they have had a notable impact on the role and growth of town centres.

Returning to the performance of town centres, it is noticeable from Table 3.2 that town centre performance is significantly worse if the Central London ATCA is excluded from the town centre figures. Thus, whilst the Central London ATCA has seen comparison retail employment increase by 16 per cent over the study period, the remaining town centres have seen their comparison retail employment decline by 22 per cent.
Overall, therefore, London's town centres lost out between 1971 and 2000 in terms of comparison retail employment both to out-of-centre locations, and to a lesser extent, the Central London ATCA.

Figure 3.4[2] shows those boroughs which have seen the biggest shift away from town centres in terms of comparison retail employment (those towards the bottom of the chart) and those in which town centres have maintained their share of employment (those towards the top of the chart). The figure excludes Tower Hamlets and the City of London which have no major town centres as well as Westminster where results are too strongly influenced by the Central London ATCA.

In Figure 3.4, the bars show the change for each borough between the amount of comparison employment in town centres in 1971 and the amount in 2000. Thus, for example, Barnet had 75 per cent of its comparison retail employment in town centres in 1971 but just 26 per cent in 2000 and so the change in share for Barnet is –49 per cent (calculated as 26-75).

Figure 3.4: Change in share of comparison retail employment in town centres, 1971-2000



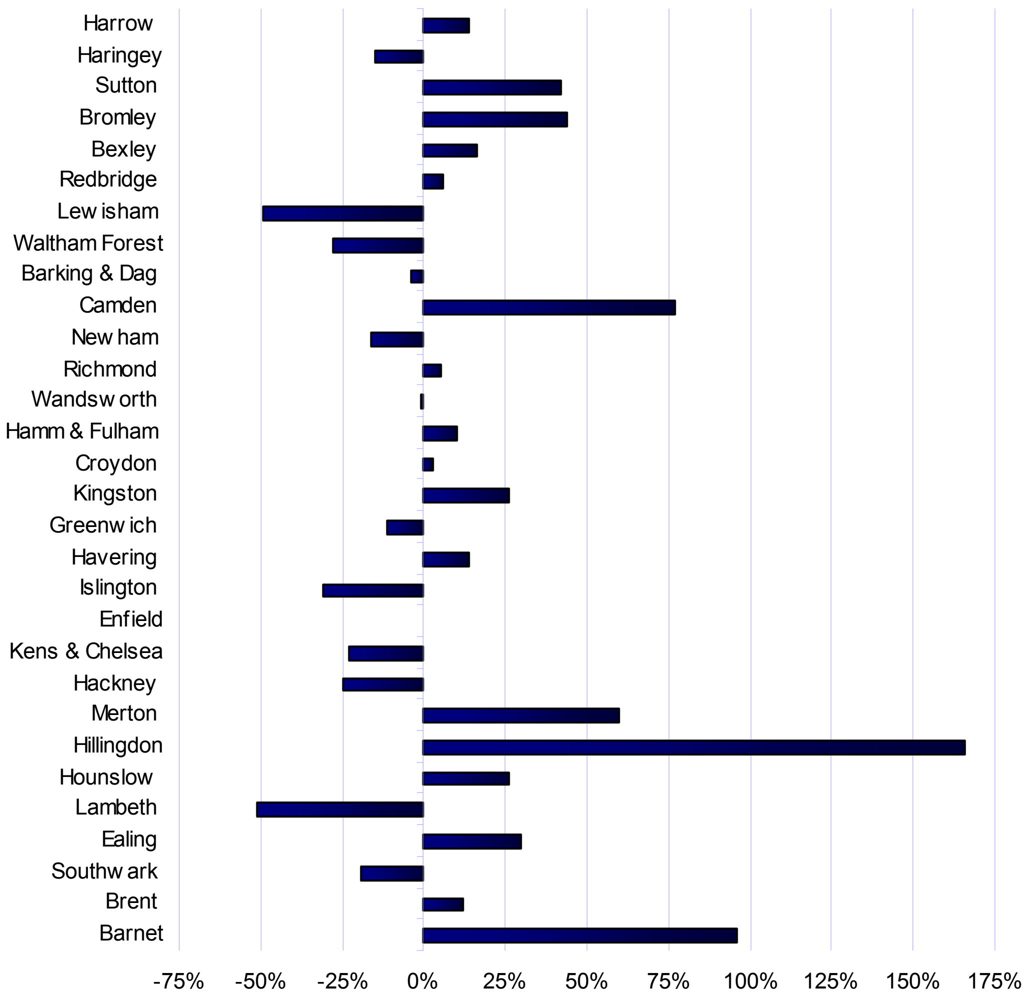
Source: GLA Economics based on CASA data

[2] Figure 3.4 is based on data from the 100 town centres used in the 1971-2000 comparison. Whilst there are some smaller town centres that were not included in this analysis, these 100 centres include all the larger town centres across London so the results should be fairly robust.

Overall, the nearer to the bottom of Figure 3.4 the borough is situated the greater has been the shift away from town centres during the study period. Thus Barnet has seen the biggest shift towards out-of-centre retail employment as would be expected given it is the location for Brent Cross Shopping Centre.

It is noticeable that only one borough, Harrow, actually saw town centres increase their share of retail employment over the study period. All the other boroughs recorded some shift in comparison retail employment away from town centres towards out-of-centre locations.

Figure 3.5: Change in comparison retail employment by borough, 1971-2000



Source: GLA Economics based on CASA data

Figure 3.5 lists the boroughs in the same order as Figure 3.4, such that those towards the bottom of the chart have seen the biggest shift away from town centres. Figure 3.5 shows the overall change in comparison retail employment in each borough. What is apparent is that the boroughs that have performed best in terms of increasing retail employment over the study period are split between those that have witnessed a large shift towards out-of-centre retail, such as Barnet, Hillingdon, Hounslow and Merton, and those which have kept a strong town-centre focus, such as Harrow, Sutton and Bromley.

The effect of size on the performance of town centres

There are clearly many factors that will be relevant to whether any one town centre has been a good or poor performer since 1971. One factor that appears to be important is the size of the town centre. Basically, this data shows that the larger the town centre, the greater the chance it will have subsequently been a good performer in terms of increasing retail employment.

To show this the 99 town centres[3] have been split into three categories ‘large’, ‘medium’ and ‘small’ depending upon the amount of A1 floorspace in each centre in 1971. Thus, there is one group of 33 ‘large’ town centres consisting of those that had A1 floorspace above 29,000 m^2 in 1971; a group of 33 ‘medium’ sized town centres where A1 floorspace in 1971 was between 17,000-29,000 m^2 and finally a group of 33 ‘small’ town centres where A1 floorspace in 1971 was below 17,000 m^2.

Overall, employment in comparison retail across all the town centres studies declined by 22 per cent between 1971 and 2000. However, Table 3.3 shows us that this loss has not been evenly distributed across town centres. Instead, the results show that the loss in employment was lowest amongst the ‘large’ town centres (-18 per cent) and greatest amongst the ‘small’ town centres (-36 per cent).

Furthermore Table 3.3 also shows that a ‘large’ town centre was more likely to have witnessed an increase in comparison retail employment over the study period with 27 per cent of them increasing employment compared to 21 per cent of ‘medium’ centres and 13 per cent of ‘small’ centres.

A ‘large’ centre was also less likely to have witnessed a large (50 per cent or more) decline in its comparison employment with only 27 per cent of ‘large’ centres witnessing such a decline compared to 45 per cent of ‘medium’ and 53 per cent of ‘small’ town centres.

[3] In total 100 town centres were analysed in this study, but the Central London ATCA is excluded from this section as it is atypical in comparison to the other town centres, thus leaving 99 to be studied.

Table 3.3: Changes in comparison retail employment in town centres by size, 1971-2000

Size of town centre (1971, A1 floorspace)	Average change in comparison employment 1971-2000	% of TCs which increased comparison employment 1971-2000	% of TCs in which comparison employment fell by >50 per cent 1971-2000
'large' (>29,000 m^2)	-18%	27%	27%
'medium' (17,000–29,000 m^2)	-29%	21%	45%
'small' (<17,000 m^2)	-36%	13%	53%

Note: TC = Town centre

Source: GLA Economics based on CASA data

Overall, therefore, Table 3.3 does suggests that the larger the town centre in 1971, the greater the chance it will have been a good performer relative to other town centres in terms of comparison retail employment levels between 1971 and 2000.

It should be noted, however, that Table 3.3 does not show that this is always the case. To the contrary, it shows that in contrast to the average trend some large town centres witnessed large declines in employment (27 per cent of large town centres witnessed a decline in comparison employment of over 50 per cent) whilst some small town centres (13 per cent) increased employment. Therefore, there is no reason to assume that a large town centre will always perform better than a small town centre. However, on average they did so over the 1971 to 2000 study period.

Comparison retail summary

Comparison retail employment across London increased by 12 per cent between 1971 and 2000.

Out-of-centre locations increased comparison retail employment by 75 per cent over this period whilst the Central London ATCA increased its comparison retail employment by 16 per cent.

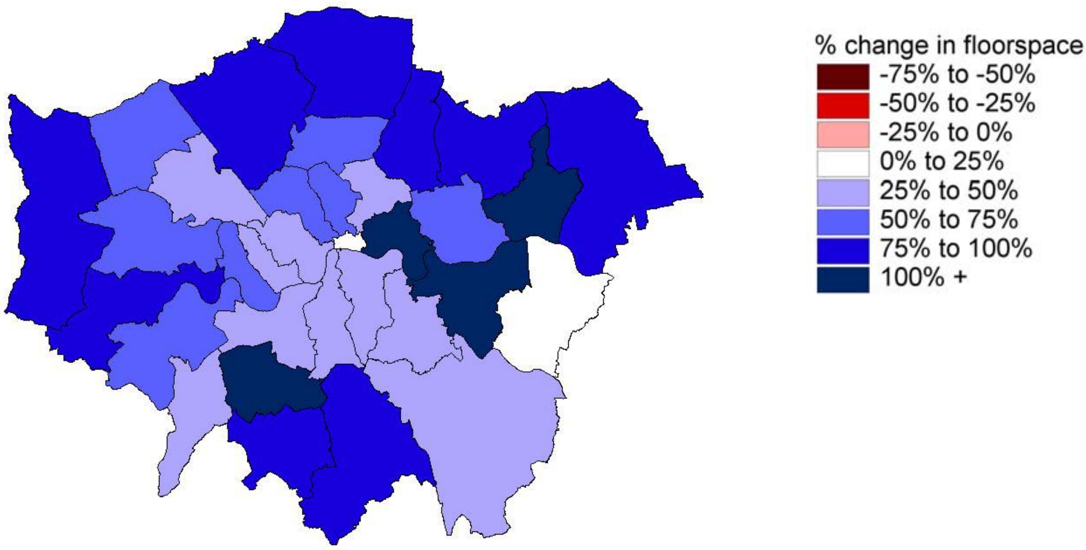
London's other major town centres witnessed a 22 per cent decline in comparison retail employment over the study period.

This decline in town centres was disproportionately focused upon small town centres which suffered larger declines in comparison retail employment between 1971 and 2000 than large town centres.

4. Retail floorspace

Assessing the changes in retail floorspace is more problematic (as discussed in Appendix A) than looking at the changes in retail employment because of the differences in the way in which retail floorspace was assessed in the 1971 and 2000 series. Therefore, this paper largely concentrates on the more reliable data on employment while only this section briefly assesses the results of the floorspace analysis.

Figure 4.1: Percentage change in A1 floorspace by borough, 1971-2000



Source: CASA

What is immediately striking in Figure 4.1, which uses the same percentage scale as the previous borough maps, is that all of London's boroughs have seen an increase in the amount of A1 retail floorspace between 1971 and 2000.

Of course, this map hides considerable variation within the boroughs themselves. Some additional trends are evident from the floorspace data.

Firstly, there has been a shift away from town centres in the provision of new floorspace. Thus, whilst the 99 town centres (excluding the Central London ATCA) studied increased their overall A1 floorspace by 26 per cent, the total increase for London as a whole over the same period was 66 per cent (see Table 4.1).

Table 4.1: Changes in A1 floorspace, 1971-2000

Total London	Town centres (excluding Central London ATCA)
66 %	26 %

Source: GLA Economics based on CASA data

Secondly, it is noticeable that the increases in floorspace, as shown in Table 4.1, exceed the increases in employment observed in Tables 2.1, 2.2, 2.3, 3.1 and 3.2. This is to be expected as productivity improvements and changes in store design and operation over the study period will have led to a reduced requirement for employees per unit area of floorspace. In addition, retail appears to have become more extensive in its space requirements with a move towards larger stores, particularly in out-of-centre locations.

It must be noted, however, that caution must be observed in comparing the tables on retail employment in this report with those on retail floorspace. This is because the two sets of floorspace data come from slightly different definitions and as such are not directly comparable. As a result, the floorspace data are not likely to be as reliable as the employment data used in this analysis.

Indeed, comparing the floorspace statistics over time produces some surprising results. In terms of retail floorspace, 'small' town centres have witnessed the largest percentage increase between 1971 and 2000 and 'large' town centres the smallest percentage increase. This is shown in Table 4.2[4].

Table 4.2: Growth in A1 floorspace in town centres by size, 1971-2000

Size of town centre (1971, A1 floorspace)	Growth in A1 floorspace 1971-2000
'large' (>29,000 m^2)	25 %
'medium' (17,000–29,000 m^2)	28 %
'small' (<17,000 m^2)	36 %

Source: GLA Economics based on CASA data

[4] Note that this table refers to percentage changes. In absolute terms more new floorspace was created in the 'large' town centres than in the 'small' town centres between 1971 and 2000.

This is surprising because the employment statistics from Tables 2.3 and 3.3 showed that 'small' town centres had lost grocery and comparison retail employment to a greater extent than 'large' town centres. Comparing the floorspace and employment statistics would thus seem to suggest that small town centres have in some way been more productive (in that they have reduced employment per unit of floorspace at a faster rate) than large town centres over 1971-2000. However, it is difficult to see what the mechanism behind such a change would have been.

A possible explanation could be that small town centres have seen a larger shift into service retail than large town centres. In such a case, small centres could be expected to perform worse in terms of grocery and comparison retail employment, as measured in Tables 3.1 and 3.3, but have seen a greater increase in service retail employment to partly compensate for this and to fill up some of the growth in floorspace evident from Table 4.2.

Unfortunately, there is no 1971 data available for service retail to enable a full examination of this hypothesis. What does exist, however, is the ODPM's town centre data for London for 2000 and analysis of this shows that service retail makes up a higher proportion of total retail employment in small town centres than it does in large town centres. This result is shown in Table 4.3.

Table 4.3: Retail employment in town centres by type and size of centre, 2000

A1 Floorspace	Grocery	Comparison	Service	Total
Central London ATCA	9%	71%	20%	100%
50,000 - 300,000 m2	16%	68%	16%	100%
25,000 - 50,000 m2	32%	51%	18%	100%
15,000 - 25,000 m2	40%	41%	19%	100%
10,000 - 15,000 m2	39%	41%	20%	100%
5,000 - 10,000 m2	34%	37%	28%	100%

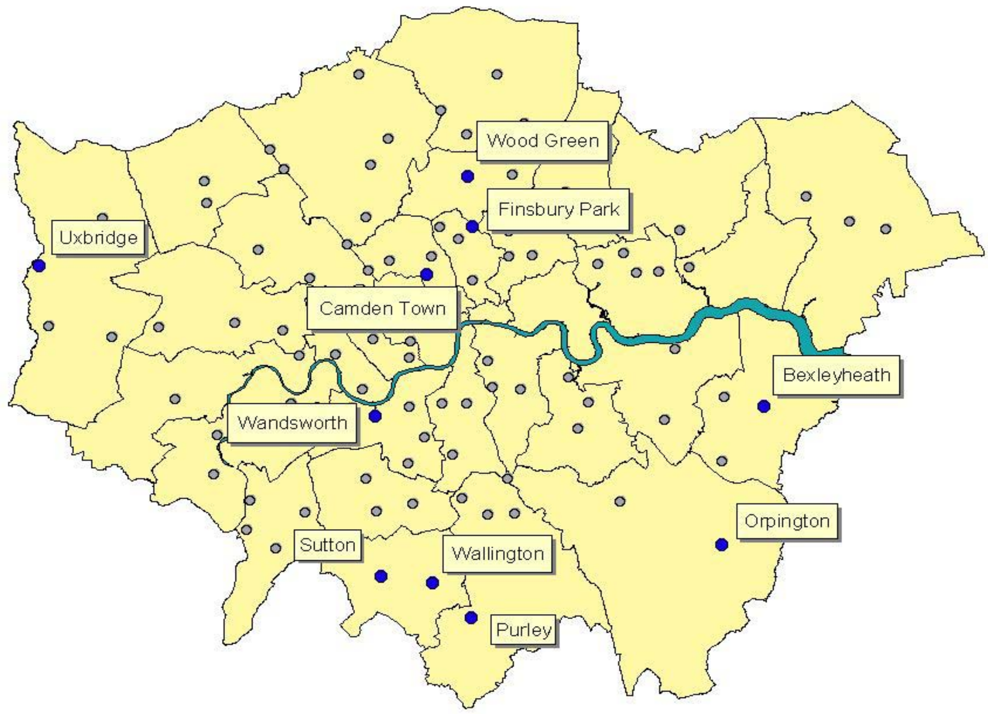
Source: GLA Economics based on CASA data

These results do therefore lend some support to the idea that small centres may have seen a shift into service retail since 1971. Unfortunately, the absence of any data on service retail for 1971 means that this is difficult to confirm.

Returning to the data on floorspace changes, the ten town centres which have seen the biggest increase in retail floorspace have undergone an increase of at least 96 per cent (Wallington lies in tenth place at this level) and are shown in Figure 4.2. Camden Town has seen the biggest increase of 185 per cent, arguably in line with its elevation to an international shopping destination in the 1980s and 1990s.

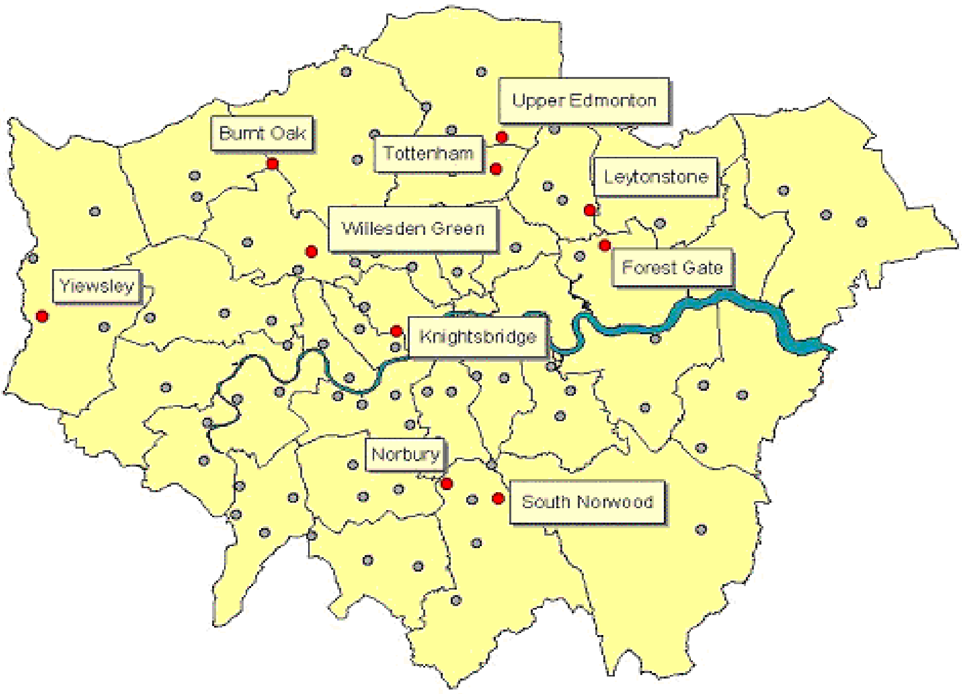
However, despite the rosy picture painted by the borough map in Figure 4.1, 31 of the 100 town centres have undergone a fall in retail floorspace. The largest of these drops occurred in Willesden Green where 63 per cent of the A1 retail stock disappeared in the 30 years since the last Census of Distribution (possibly as a result of competition from Brent Cross). The ten centres with the largest declines are shown in Figure 4.3.

Figure 4.2: Ten best performing town centres, A1 floorspace, 1971-2000



Source: CASA

Figure 4.3: Ten worst performing town centres, retail floorspace, 1971-2000



Source: CASA

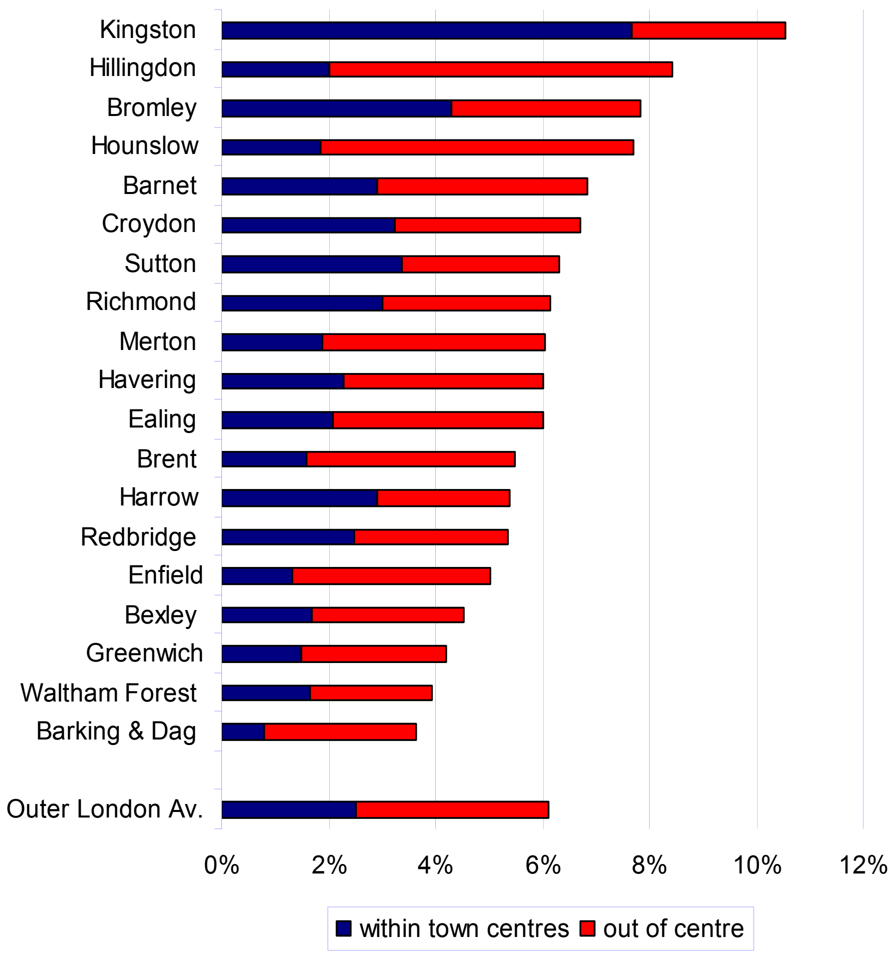
5. Analysis of London's retail by area

The remainder of this paper uses the analysis of grocery and comparison retail presented above to provide an overview of retail trends by area. The majority of this analysis is carried out by sub-region (North, South, West, East and Central). However, analysis is initially provided on an Inner London and Outer London basis as there are some interesting trends that arise from such a breakdown.

Retail in outer London

Figure 5.1 shows retail employment in 2000 as a share of the population within each Outer London borough. For example, according to the 2001 census, Kingston has a population of 147,273. Meanwhile, the ODPM's Town Centre Statistics project for 2000 gives Kingston's total retail employment (including service retail as well as grocery and comparison retail) as 15,547. Its share of retail employment to population is therefore 10.6 per cent (calculated as 15,547/147,273).

Figure 5.1: Retail employment as a share of borough population



Source: GLA Economics based on CASA data

Furthermore, using the ODPM data for each town centre, the amount of retail located in town centres can be calculated with the remainder assigned to non-town centre retail. For example, in the case of the borough of Kingston, the town centres of Kingston-Upon-Thames, Surbiton, Norbiton, Tolworth and New Malden account for a combined 73 per cent of the boroughs total retail employment. This split between town centre employment and non-town centre employment is also shown in Figure 5.2.

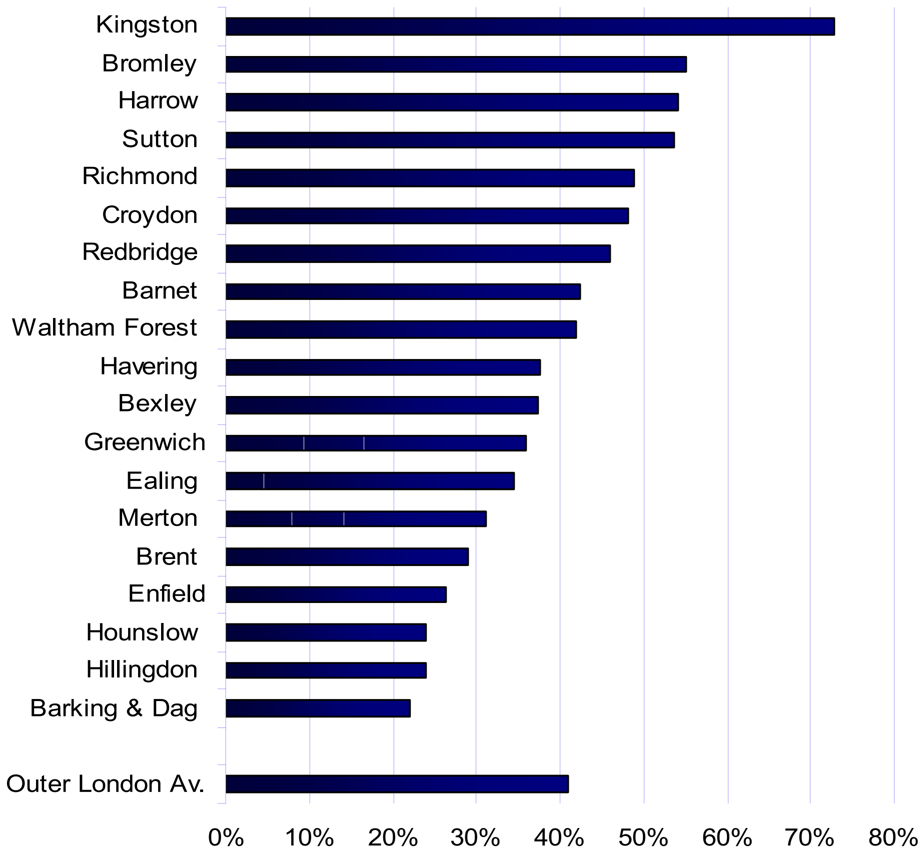
The average Outer London borough, as shown in Figure 5.1, has retail employment equivalent to six per cent of its population with 2.5 per cent employed in town centres and 3.6 per cent in non-town centre locations. However, there is quite a wide variability around this Figure, both in terms of the overall levels of retail employment and also in terms of the town centre shares in each borough.

Kingston, Hillingdon, Bromley and Hounslow have the largest share of retail employment as a share of borough population. As such, the data suggests that there is little correlation between an area having a successful retail sector, in terms of employment, and the share of retail that occurs within its town centres. This is because whilst in Kingston retail employment is predominantly town-centre based, in Hillingdon and Hounslow most retail employment is by contrast in non-town centre locations.

The lowest shares of retail employment as a share of borough population occur in Barking and Dagenham, Waltham Forest, and Greenwich. In each case, the amount of both town centre and non-town centre retail employment are below average. Barking and Dagenham which has the least retail employment as a share of population is particularly short of town centre retail employment with a share of just 0.8 per cent compared to its borough population, the lowest in London.

Figure 5.2 shows the share of retail employment within each borough that occurs within town centres. It shows that the average across all Outer London boroughs is that 41 per cent of retail employment is in town-centres. It is also interesting to view Figure 5.2 in relation to Figure 3.4 which showed the extent to which different boroughs have seen a shift away from town centres during the study period.

Figure 5.2: Retail employment 2000 – share in town centres



Source: GLA Economics based on CASA data

Retail in Inner London

When examining retail in Inner London, the process is complicated by the existence of the Central London ATCA which being such a large retail centre skews any data that attempts to show averages across Inner London. For this reason, when considering Inner London, averages have been calculated not only for Inner London overall but additionally for Inner London excluding the Central London ATCA. This latter categorisation allows us to see how retail in the Central London ATCA has compared to and influenced retail trends in the remainder of Inner London.

Table 5.1 shows that over the period 1971-2000, retail employment in the Central London ATCA increased for comparison retail but declined for grocery retail. Nevertheless, the decline in employment in grocery retail was smaller in the Central London ACTA than in London overall.

Inner London (excluding Central London ATCA) has not fared so well over the study period in terms of retail employment with combined employment in grocery and comparison retail declining by 16 per cent whilst employment in Outer London was stable. The poor performance of Inner London (excluding Central London ATCA) is down to changes in comparison retail employment. Whilst both Outer London and the Central London ATCA increased comparison retail employment between 1971 and 2000, the Inner London boroughs (excluding Central London ATCA) witnessed a 12 per cent decrease suggesting a shift in comparison retail away from these inner London boroughs to either the Central London ATCA or Outer London (or both) during the study period.

Table 5.1: Change in retail employment in Inner London, 1971-2000

Region	Grocery retail	Comparison retail	Grocery & comparison
Inner London (excluding Central London ATCA)	-20%	-12%	-16%
Central London ATCA	-10%	16%	12%
Outer London	-23%	25%	0%

Source: GLA Economics based on CASA data

The trends in comparison retail employment are examined more closely in Table 5.2, which shows the changes that have occurred between 1971 and 2000 for all Inner London boroughs.

Table 5.2 shows that only two boroughs, Camden and Westminster, increased comparison retail employment to a larger degree than occurred over the same period in Outer London. For the remaining Inner London boroughs not only did they fare less well than Outer London, but ten of the fourteen boroughs witnessed declines in comparison retail employment over the study period with Lambeth and Lewisham showing the largest declines.

Despite this relatively poor performance between 1971 and 2000 of the Inner London boroughs, the amount of retail employment relative to population does remain higher within Inner London than is the case in Outer London.

This is shown in Table 5.3. Thus, whilst in Outer London, retail employment is equivalent to 6.1 per cent of the population, in Inner London (excluding the London Borough of Westminster – which here acts as a proxy for the Central London ATCA) it is equivalent to 6.9 per cent of the population.

The difference is largely due to higher levels of service retail employment within the Inner London boroughs. Grocery retail employment is also higher in Inner London. For comparison retail employment, the inner London boroughs (excluding Westminster) have a similar share of employment (2.7-2.8 per cent) relative to population as Outer London.

Table 5.2: Comparison retail employment in Inner London by borough

Borough	Comparison retail employment, 2000	Percentage change, 1971-2000
Camden	13,498	77
Westminster	53,548	24
City	3,552	13
Hammersmith & Fulham	4,870	10
Wandsworth	6,794	-1
Tower Hamlets	2,730	-10
Haringey	4,623	-15
Newham	4,331	-16
Southwark	4,278	-19
Kensington & Chelsea	12,876	-23
Hackney	3,045	-25
Islington	3,855	-31
Lewisham	3,334	-49
Lambeth	2,968	-51
Inner London average		**1**
Inner London average (excluding Central London ATCA)		**-12**
Outer London average		**25**

Source: GLA Economics based on CASA data

Table 5.3: Retail employment as share of population by type of retail

	Grocery	Comparison	Service retail	Total retail
Outer London	1.9%	2.8%	1.4%	6.1%
Inner London	2.3%	4.5%	2.6%	9.4%
Inner London excluding LB of Westminster	2.1%	2.7%	2.1%	6.9%

Source: GLA Economics based on CASA data

Whilst it is true that Inner London does have a greater share of retail employment relative to population than Outer London, this employment is not shared equally amongst the boroughs as Table 5.4 shows. Six of the boroughs, Haringey, Tower Hamlets, Lambeth, Newham, Hackney and Lewisham all have low levels of retail employment relative to their population. In the case of Lewisham, the level is the lowest of any London borough, even below Barking and Dagenham.

Consistent with the above analysis on Inner London is the fact that many of the Inner London town centres (outside of the Central London ATCA) have lost sizable levels of employment and in many cases have performed worse than similar sized town centres in Outer London. For example, amongst town centres with over 50,000 m^2 of A1 floorspace, four of the five centres with the biggest declines in comparison employment are found in Inner London as are four of the six worst performing centres of between 20,000-50,000 m^2 of A1 floorspace.

Table 5.4: Retail employment as a share of borough population - Inner London

	Retail employment	Retail employment / population
City	7,925	110.3%
Westminster	81,704	45.1%
Kensington & Chelsea	24,643	15.5%
Camden	28,876	14.6%
Islington	13,726	7.8%
Hammersmith & Fulham	12,856	7.8%
Southwark	16,020	6.5%
Wandsworth	16,651	6.4%
Haringey	10,572	4.9%
Tower Hamlets	9,027	4.6%
Lambeth	11,532	4.3%
Newham	9,759	4.0%
Hackney	8,067	4.0%
Lewisham	8,650	3.5%

Source: GLA Economics based on CASA data

6. Retail by London sub-region

West London (Brent, Ealing, Harrow, Hillingdon, Hounslow, Hammersmith & Fulham)
As shown in Table 3.1, West London exhibited stronger growth in comparison retail employment between 1971 and 2000 than the other areas of London, due partly but not entirely to growth in retail employment at Heathrow Airport. Therefore in examining the structure of retail in this region we are examining one that has successfully raised retail employment over the past three decades.

One clear factor about West London is that it is the area of London most reliant on out-of-centre retail. Two statistics illustrate this:-

- West London has a share of 30 per cent of its retail employment located in town centres. This is lower than the for each of the other sub-regions of London and lower than the overall average for London (excluding Central London ATCA) which is 40 per cent.
- Employment in non-town centre retail as a share of population is 4.7 per cent in West London compared to 3.0-3.4 per cent in the North, South and East of London.

Five of the six boroughs underpin these trends, each having a high level of retail employment in non-town centre locations relative to their population and in comparison with other London boroughs. The exception within the region is the borough of Harrow, where retail is much more strongly town centre based.

In terms of town centres across the region, Harrow and Uxbridge are the two that have been most successful in terms of increasing A1 floorspace and retail employment since 1971.

Relative to its population, **Hillingdon** has a very high level of retail employment, second only to Kingston amongst the 20 Outer London boroughs. The majority of this is in out-of-centre retail, in which employment is equivalent to 6.4 per cent of the borough population, the highest share in London. Both the high retail employment and the large out-of-centre share largely reflect the existence of significant retail employment at Heathrow Airport.

In terms of town centres, Hillingdon has one major centre in Uxbridge together with three further centres with over 10,000 m^2 A1 floorspace. While employment in the smaller centres has declined, Uxbridge has expanded since 1971 doubling its employment in grocery retail. Nevertheless, growth in employment has been much larger out-of-centre than within town centres in Hillingdon over the study period.

Hounslow is similar to Hillingdon in having a large share of employment in out-of-centre retail (5.9 per cent compared to an average across boroughs of 3.6 per cent). It is also similar in that overall retail employment in the borough is one of the highest in Outer London relative to its population.

In terms of town centres, there is one Major town centre, Hounslow. This has been one of the poorer performing larger centres across Outer London in terms of changes in floorspace and comparison employment since 1971 according to this survey. Chiswick and Feltham are the other two significant centres in the borough.

Out-of-centre retail employment in **Brent** is close to the Outer London average. However, retail employment in town centres as a share of its total population is one of the lowest across Outer London. Its proximity to Brent Cross in neighbouring Barnet is probably a key factor in this.

Brent has no town centres of above 50,000 m^2 A1 floorspace but does have five centres greater than 10,000 m^2. However, retail employment has been shifting to out-of-centre sites at a faster rate since 1971 within Brent than in most other Outer London boroughs.

Ealing has an above average share of grocery retail employment in town centres but a below average share of comparison retail employment. The statistic on grocery retail employment can be explained by the fact that the town of Ealing was one of the few centres to see a rise in grocery retail employment between 1971 and 2000. The lower share of comparison retail employment in the borough's town centres, by contrast, is consistent with the fact that the borough has an above average share of retail employment in out-of-centre sites, much of which can be assumed to be for comparison retail.

Hammersmith and Fulham is one of the few Inner London boroughs to have seen increased comparison retail employment between 1971 and 2000. The only sizable retail centres in the borough are Fulham and Hammersmith. However, these account for less than 40 per cent of the boroughs A1 floorspace and it is outside of these two centres that the increased comparison retail employment has grown. In terms of grocery retail, employment in the borough declined by 24 per cent from 1971 to 2000, a slightly larger decline than the Inner London (excluding Central London ATCA) average.

Harrow is the exception to the rule for West London. Within the borough of Harrow, 54 per cent of retail employment is in town centres, significantly higher than the 41 per cent average for Outer London and the 30 per cent average across West London. Furthermore, it is the only borough in Outer London to have seen faster growth in comparison retail employment in its town-centres than outside them over the 30 year study period. This is consistent with the fact that employment in out-of centre retail is one of the lowest in London relative to population.

The trends in the borough of Harrow are largely down to the success of the town centre of Harrow which has seen A1 floorspace rise by over 200 per cent since 1971 and increases in both grocery and comparison retail employment over this period.

North London (Barnet, Enfield, Haringey & Waltham Forest)
The retail map of North London is dominated by the existence of Brent Cross Shopping centre in the borough of Barnet. Thus, whilst employment in comparison retail increased by 15 per cent between 1971-2000 across North London, this was driven by a doubling of employment in Barnet compensating for a decline in the other three boroughs.

Overall, the North London boroughs have a lower share of retail employment than the average for London (5.3 per cent of its population compared to 6.4 per cent for London excluding Central London ATCA). However, despite the existence of Brent Cross, the share of this employment which lies in town-centres in North London is the same as that for London overall (40 per cent).

Although **Barnet** includes Brent Cross shopping centre, it still has 12 town centres with more than 10,000 m^2 of A1 floorspace, which is more than any other Outer London borough. Data which is available on the changes since 1971 for eight of these centres shows that for six of the eight centres there has been a decline in town centre comparison retail employment of 30-70 per cent with only Edgware witnessing a significant increase. This contrasts with increased comparison retail employment of 96 per cent across the borough. This clearly illustrates the fact that comparison retail employment in the borough has significantly shifted away from town centres to out-of-centre locations over the study period.

However, the fact there are so many town centres in Barnet means that the level of town centre retail employment relative to borough population in Barnet remains above the London average. Furthermore, the level of out-of-centre retail employment relative to population is only the same as the London average, perhaps suggesting that the high numbers of town centres means that apart from Brent Cross there is relatively little out-of-centre retail elsewhere in the borough.

Haringey is one of the minority of boroughs with more retail employment in town centres than in out-of-centre locations. Town centres have maintained there share of retail employment in the borough over the 1971-2000 period although the overall level of employment has declined. Currently, the level of retail employment in the borough relative to its population is below average (see Figure 11).

Wood Green is by far the largest town centre in the borough and has performed well over the study period in increasing floorspace and grocery retail employment although its comparison retail employment has been static. The borough's smaller town centres, by comparison, have seen reduced employment.

Enfield has the second lowest level of retail employment in town centres, relative to population, of all the Outer London boroughs. Almost three-quarters of its retail employment is therefore in non-centre locations.

Despite this, the borough's largest town centre, Enfield, has managed to increase its level of retail employment since 1971 and has performed well compared to other similarly sized town centres across London. The borough's smaller town centres, such as Lower Edmonton, Upper Edmonton and Palmers Green, have however all seen retail employment fall sharply.

Waltham Forest witnessed the largest percentage decrease of retail employment from 1971-2000 of all the Outer London boroughs and now has the second lowest level of retail employment relative to borough population. Both its employment in town centre and in out-of-centre retail are significantly below average.

In terms of town centres, Walthamstow is by far the largest in the borough but has seen retail employment decline since 1971. The declines have been even larger in the smaller town centres of Bakers Arms, Chingford Mount and Leytonstone.

South London (Bromley, Croydon, Kingston, Merton, Richmond, Sutton)
Retail in South London is significantly more town-centre based than other regions of London with 53 per cent of its retail employment located in town centres compared to an average of 40 per cent across London (excluding Central London ATCA) overall. For comparison retail alone, the figures are 67 per cent in town centres in Outer South London against an average of 51 per cent for London. The only borough in the region that differs from this trend is Merton. In the other five boroughs major town centres dominate the regions retail offer.

South London also has a high share of employment in retail relative to population. Thus, retail employment in the South sub-region is 7.2 per cent of the population compared to 6.7 per cent, 5.3 per cent and 4.8 per cent in the West, North and East of London respectively. Employment in out-of-centre retail is slightly below average in the South whilst employment in town centres is significantly above average.

Kingston has the highest share of retail employment relative to population of all outer London boroughs (see Figure 11). It also has by far the highest share employed in town centres. However, despite the strength of the town centres, there was, similar to most other boroughs, a shift to out-of-centre retail employment between 1971 and 2000. Nevertheless, town centres continue to dominate in the borough.

These town centre trends are largely due to the town of Kingston-Upon-Thames which with over 200,000 m^2 of A1 floorspace is the second largest retail town centre in Outer London. Kingston-Upon-Thames has increased retail employment over the study period. The borough's smaller town centres of New Malden and Surbiton have also fared relatively well performing better than most similarly sized centres across Outer London.

Surbiton, for example, witnessed a very large increase in grocery retail employment whilst most similarly sized centres have seen their grocery retail employment decline.

Richmond is a fairly typical Outer London borough in terms of the statistics. Its level of retail employment relative to population is close to the outer London average. It has seen a shift of comparison employment towards out-of-centre locations. It has one town centre of above 50,000 m^2 A1 floorspace which maintained its comparison retail employment between 1971 and 2000 and a number of smaller town centres which lost comparison retail employment over the same period. The one difference to the average for Outer London is that Richmond maintains a higher than average share of retail employment in town-centres, in common with most other South London boroughs.

Sutton is another borough with one major town centre and a number of smaller ones. However, in contrast to many other boroughs these town centres performed well from 1971 to 2000 such that the data shows no significant shift towards out-of-centre retail in the borough. The largest town centre, Sutton, has increased retail employment by over 20 per cent during the study period. Meanwhile, the smaller town centre of Wallington has been one of the best performing town centres in London increasing its comparison retail employment by 175 per cent.

Merton differs from other South London boroughs in that its retail employment is predominantly out-of-centre with only 31 per cent in town-centres compared to 40 per cent across all of London and an average of 53 per cent in South London. Nevertheless, the borough saw one of the highest increases in comparison retail employment between 1971 and 2000 but this was almost all out-of-centre.

The main town centre in Merton is Wimbledon. In terms of comparison employment Wimbledon performed well between 1971 and 2000. However, the smaller town centres such as Morden and Mitcham witnessed big declines in retail employment over the same period as retail in the borough switched from these smaller centres to new out-of-centre locations.

Croydon did not increase its retail employment levels to the same extent as other South London boroughs between 1971 and 2000 whilst its town centres lost retail employment over the same period. Nevertheless, it still has above average retail employment relative to population and above average town centre focus compared to other Outer London boroughs.

Its largest town centre, Croydon, is the largest retail town centre in Outer London with over 260,000 m^2 of A1 floorspace. Its retail employment declined by 29 per cent for grocery retail and 7 per cent for comparison retail. The smaller town centres of Purley, Thornton Heath, Norbury and South Norwood all witnessed much larger declines.

Bromley has one of the highest shares of retail employment relative to population in Outer London. Furthermore, it is second only to Kingston in its share (55 per cent) of retail employment in town-centres whilst having average levels of retail employment in out-of-centre locations. The borough has been relatively successful at maintaining comparison retail in town centres with only a small shift towards out-of-centre employment in the study period. This is because its two main town centres, Bromley and Orpington, have been amongst the most successful in London at increasing comparison retail employment.

East London (Barking & Dagenham, Bexley, City of London, Greenwich, Hackney, Havering, Lewisham, Newham, Redbridge, Tower Hamlets)
The main factor characterising retail in East London is that it has a low level of retail employment relative to population compared to London overall. Employment is equally low in both town centres and out-of-centre locations with all the boroughs (except City of London) having below average employment in town centres and only Havering having average employment in out-of-centre locations.

Additionally, as shown in Table 3.1, growth in comparison retail employment was significantly lower in Outer East London than other regions between 1971 and 2000. Thus, the region appears to have the least retail offer and also to be falling further behind other regions. The existence of the Lakeside shopping centre just outside East London could be a possible explanation for this, although it could equally be a reflection of the less affluent nature of the region.

Within the East London region the split between town centre and out-of-centre is similar to that for London overall with Redbridge having the greatest town centre focus in the region and Barking and Dagenham the smallest.

Barking and Dagenham employs only 5,972 people in the retail sector which at 3.6 per cent of its population is the lowest share of any Outer London borough. Furthermore, its amount of retail employment in town centres at just 0.8 per cent of its population is also the lowest in Outer London, well below the 2.5 per cent average.

The borough only has two town centres that make it into the ODPM's town centre database. Barking is the largest but at only 42,690 m^2 it is a medium-sized centre not a large one and in line with most other medium-sized centres in London it saw its retail employment decline between 1971 and 2000. Overall the data suggests that this borough has a lack both of town centres and retail facilities in general.

Newham only has marginally more retail employment relative to population than Barking and Dagenham and it witnessed declining retail employment between 1971 and 2000. The town centres of East Ham, Upton Park and particularly Forest Gate all lost significant retail employment over this period. However, the borough does include Stratford and whilst comparison retail declined slightly over the study period in Stratford, grocery retail employment has rocketed in the town.

Bexley also has a below average level of retail employment relative to population. However, employment in comparison retail did increase in the borough between 1971 and 2000. Indeed, the main town centre of Bexleyheath was one of the best performing in London over the 1971-2000 period increasing retail employment in both comparison and grocery retail by over 60 per cent. However, the smaller town centres of Welling and Sidcup have seen employment decline.

Amongst East London boroughs, it is **Redbridge** which has the highest share of employment in town centres. Its main centre is Ilford in which retail employment fell slightly over the 1971-2000 period. Its other town centres include Barkingside, South Woodford, Seven Kings and Gants Hill.

Havering also has a major town centre with Romford the largest in East London. However, Havering also has substantially more retail employment in out-of-centre locations compared to the other East London boroughs. Indeed, data shows a trend towards out-of-centre retail employment in both grocery and comparison retail in the borough.

The overall result of having a large town centre and significant out-of-centre retail is that Havering has the highest share of retail employment relative to population in the East sub-region, a level that is close to the Outer London average. Additionally, the borough's smaller town centres of Hornchurch and Upminster have performed well in terms of comparison retail employment when compared to similar sized towns elsewhere.

Lewisham witnessed major declines in retail employment between 1971 and 2000 sharing similar characteristics to Lambeth and Southwark (see below) in that its major centres led the decline with Lewisham losing 49 per cent of its comparison employment, Catford 58 per cent and Deptford 91 per cent over the study period. Grocery retail employment across the borough also fell sharply down 46 per cent. The consequence is that Lewisham now has the lowest share of retail employment relative to population of any London borough.

Greenwich also witnessed declines in retail employment between 1971 and 2000 with its major centre, Woolwich, suffering sharp declines in both comparison and grocery retail employment. However, its second largest centre, Eltham, bucked the trend and increased retail employment. Overall, Greenwich was around average amongst the Inner London boroughs (excluding Central London ATCA) in terms of the changes in employment over the study period with a 16 per cent decline in grocery retail employment and an 11 per cent decline in comparison retail employment.

Tower Hamlets has no retail centres with over 20,000 m^2 of A1 floorspace. As a result, its town centres only account for 14 per cent of its retail floorspace. Its largest centre is now Canary Wharf followed by Bethnal Green and then by Bow. Between 1971 and 2000 its retail employment fell by ten per cent for comparison retail and eight per cent for grocery retail. Not surprisingly given its lack of town centres, its share of retail employment relative to its population is low at 4.6 per cent.

Hackney has three medium-sized town centres: Dalston, Stoke Newington and Hackney. In all three centres employment fell quite sharply. The borough as a whole witnessed a sizeable decline in comparison retail employment (25 per cent) and a very large decline in grocery retail employment (47 per cent). At just four per cent, its share of retail employment to population is one of the lowest in London.

Almost 8,000 people are employed in retail in the **City of London**. Data shows it increased its comparison retail employment by 13 per cent in the study period but witnessed a 25 per cent decline in grocery retail employment.

Central London Sub-Region (Camden, Islington, Kensington and Chelsea, Lambeth, Southwark, Wandsworth, and Westminster)

Wandsworth has five significant retail centres and these account for over 50 per cent of the boroughs' A1 floorspace. Wandsworth had stable comparison retail employment between 1971 and 2000 and a fairly typical decline of 23 per cent in its grocery retail employment. Interestingly the borough's five town centres have witnessed sharply contrasting trends. In the town of Wandsworth, comparison retail employment more than doubled over the study period whilst its grocery retail employment fell very sharply. By contrast Clapham Junction increased its grocery retail employment but lost comparison retail employment. Balham and Tooting suffered large declines in both, while employment in Putney High Street was stable.

Lambeth has seen a major decline in its retail employment over the study period with grocery retail employment down 31 per cent and comparison retail employment down 51 per cent. In terms of comparison retail employment the borough's major town centre, Brixton, was the worst performing of all London's larger town centres with a 73 per cent decline between 1971 and 2000. There was a similar large decline in the borough's other significant town centre, Streatham. As a result, retail employment as a share of population for Lambeth is below average at just 4.3 per cent.

Southwark appears to share many similar characteristics to neighbouring Lambeth and Lewisham. In particular, its major town centres (Peckham, Walworth and Camberwell) saw retail employment plummet between 1971 and 2000. Nevertheless, borough wide, Southwark did not fare as badly as Lambeth and indeed it actually increased its level of grocery retail during this period. Also retail employment as a share of population remains higher than its neighbouring boroughs at 6.5 per cent.

Islington has a much higher share of retail employment to population at 7.8 per cent. Its main centres are Holloway Road and Angel. Both these centres witnessed declining comparison retail but increased grocery retail employment between 1971 and 2000. Overall, the borough witnessed a 31 per cent decline in comparison employment and a 20 per cent decline in grocery employment over the study period.

Camden has a very high share of retail employment to population of 14.6 per cent. Camden Town is its largest retail centre followed by Holborn, Finchley Road (Swiss Cottage), Kentish Town and Hampstead. Camden Town grew very strongly over the 1971 to 2000 period increasing its grocery retail employment by 229 per cent and its comparison retail employment by 95 per cent at a time when most Inner London town centres were losing retail jobs. Furthermore, the growth in Camden Town and the fact that some of the Central London ATCA lies within Camden's boundaries helped the borough sharply increase its comparison retail employment over the study period.

As shown in Table 5.4, the amount of comparison retail employment in **Westminster** dwarfs that of any other borough. Furthermore, between 1971 and 2000 the borough increased its level of comparison retail employment by 24 per cent and its level of grocery retail employment by seven per cent. In addition to the West End, the borough includes Victoria, Bayswater and Edgware Road.

Retail in **Kensington and Chelsea** is dominated by the three smart shopping areas of Kensington High Street, Kings Road Chelsea and Knightsbridge. Between 1971 and 2000, Kings Road Chelsea was the most successful increasing its comparison retail employment by 41 per cent. However, the data shows that both Kensington High Street and Knightsbridge suffered sharp declines in comparison retail employment only partially compensated for in the case of Kensington High Street by increased grocery retail employment. The data for the borough overall shows that employment in comparison retail declined whilst that for grocery retail increased. Retail employment levels in the borough are high at 15.5 per cent of population, a similar level to Camden.

7. Conclusion

In terms of retail employment large town centres performed better than small ones between 1971 and 2000. Thus, the larger the town centre, the greater the likelihood it will have increased retail employment between 1971 and 2000. Likewise, the smaller the town centre, the greater the likelihood it will have seen a large decrease in retail employment over this period. This result holds for both comparison and grocery retail.

Grocery retail employment declined across London by 21 per cent between 1971 and 2000. There was no shift away from major town centres with this decrease borne equally by the town centre sites studied in this survey and out-of-centre sites. It is likely, however, that smaller town centres not studied in this survey would have lost grocery retail employment to out-of-centre supermarkets over the study period.

Comparison retail employment increased by 12 per cent across London between 1971 and 2000. There was a shift in the location of comparison retail employment away from town centres towards out-of-centre sites with town centre sites (excluding the Central London ATCA) witnessing a decrease in comparison retail employment of 22 per cent over the study period.

The emergence of retail warehouse parks together with the growth of Brent Cross shopping centre and retail at Heathrow airport are the explanations for the shift in comparison retail employment away from town centres.

This shift of comparison retail employment away from town centres was witnessed in all London boroughs bar one. Barnet (home of Brent Cross), Hillingdon (home of Heathrow Airport), Camden, Brent and Merton were the boroughs with the biggest shifts to out-of-centre locations.

In 2000, 41 per cent of retail employment in Outer London was located in town centres. The borough with the highest share of employment in town centres was Kingston (73 per cent), the borough with the least was Barking and Dagenham (22 per cent).

Employment in retail in 2000 in Outer London was equivalent to six per cent of population. Kingston, Hillingdon, Bromley and Hounslow had the largest share of retail employment as a share of borough population amongst the Outer London boroughs. In Kingston this employment is largely town centre based. However, in Hillingdon and Hounslow it is mostly out-of-centre based. As such there does not appear to be a correlation between levels of retail employment in a borough and its town centre/out-of-centre composition.

All areas of London shared equally in the decline in grocery retail employment between 1971 and 2000 with the exception of the Central London ATCA. However, the rates of increase in comparison retail employment varied across regions. The South and the West of London experienced the biggest increases in comparison retail employment whilst growth was lowest (in fact negative) in the East sub-region of London.

West London is the area most reliant on out-of-centre retail, a trend underpinned by five of the six boroughs in the region.

North London saw retail employment rise sharply between 1971 and 2000; Barnet (home of Brent Cross and many town centres) accounted for all this growth in employment with employment in the other three boroughs declining.

South London has a greater emphasis on town centres than any other area of London. Additionally, South London has a higher level of retail employment as a share of population when compared to North, West and East London.

East London, by contrast, has the lowest level of retail employment relative to population. It was also the only London sub-region to witness a decline in comparison retail employment between 1971-2000. Its poor performance may be partially due to the opening of Lakeside Shopping Centre just outside the region. However, it may equally just be a result of the less affluent nature of the region.

The Central London ATCA increased comparison retail employment between 1971 and 2000 by 16%, above the average for London overall. Grocery employment declined in the Central London ATCA but at a slower rate than elsewhere in London.

Inner London (excluding Central London ATCA) fared worse in terms of retail employment between 1971 and 2000 than both the Central London ATCA and Outer London. In particular, the level of comparison retail in Inner London (excluding Central London ATCA) declined by 12 per cent compared to increases of 16% and 25% in Central London ATCA and in Outer London.

This decline in retail employment amongst Inner London boroughs is consistent with the fact that many of the worst performing town centres (in terms of retail employment) between 1971 and 2000 are located in Inner London boroughs. For example Brixton, Lewisham and Peckham.

Despite this decline in comparison and grocery retail employment in Inner London between 1971 and 2000, the level of retail employment relative to population remains higher in Inner London than Outer London. In Inner London (excluding Central London ATCA), employment is equivalent to 6.9 per cent of the population (it is 6.1 per cent in Outer London). Greater service retail employment and slightly higher grocery retail employment within Inner London are responsible for this difference.

Retail employment in Inner London is not shared equally amongst boroughs. Instead, employment levels are very high in Kensington and Chelsea, and Camden but low in Tower Hamlets, Lambeth, Newham, Hackney and Lewisham. At a level of retail employment of 3.5 per cent relative to its population, Lewisham has the lowest share of retail employment of any London borough.

Appendix A: The data collation process

Digitising the 1971 Census of Distribution

ODPM's new town centres statistics for 2000 are available in a variety of different digital formats, but the 1971 Census exists only in hard copy. The first phase of this operation involved digitally encoding the 1971 data.

The Volume containing data for Greater London and the South East was passed to OCR (optical character recognition) specialist Allan Webb Ltd to be scanned. OCR is the recognition of printed or written text characters by a computer. This involves photo scanning the text, character by character analysis of the scanned-in image, and then translation of the character image into character codes, such as ASCII, commonly used in data processing.

In OCR processing, the scanned-in image or bitmap is analysed for light and dark areas in order to identify each alphabetic letter or numeric digit. When a character is recognised, it is converted into an ASCII code.

This ASCII code can then be transferred into an Excel spreadsheet for storage. The formatting of the spreadsheet exactly matches that of the hard copy. These scanned spreadsheets, which are named according their Census of Distribution page number, can be found on the CD ROM accompanying this report.

Incorrect data in the scanned spreadsheets

Inherent in this process is the risk that OCR will inaccurately identify certain characters. Allan Webb rectified many, but further errors have still been found, as the examples below highlight.

Table A1: Errors discovered the in Census of Distribution table: *Retail shops in the City of London and the London boroughs by form of organisation and intermediate kind of business, 1971*

File name	District name	Shop type	Business type	Column	Correct number	Incorrect number
8/46	Bexley	All retail shops	Total retail shops	Persons engaged total	8508	5808
8/62	Hackney		Chemists, photographic dealers	Turnover	3114	3117
8/66	Haringey		Grocers and provision dealers	Shops	332	322
8/86	Merton		Other food retailers	Shops	335	355

Source: CASA

Table A2: Errors discovered in the Census of Distribution table: *Retail shops in shopping areas by form of organisation and intermediate kind of business 1971*

File name	Shopping area name	Business type	Column	Correct number	Incorrect number
8/133	Kingston upon Thames shopping area	Total retail shops	Persons engaged total	6367	3367

Source: CASA

It is important to note that errors that CASA has so far been unable to identify are likely to remain in the scanned spreadsheets, and that these errors will affect the analysis to some degree. Unexpected results should always be checked against the 1971 original hard copy, and CASA colleagues cross-check as necessary.

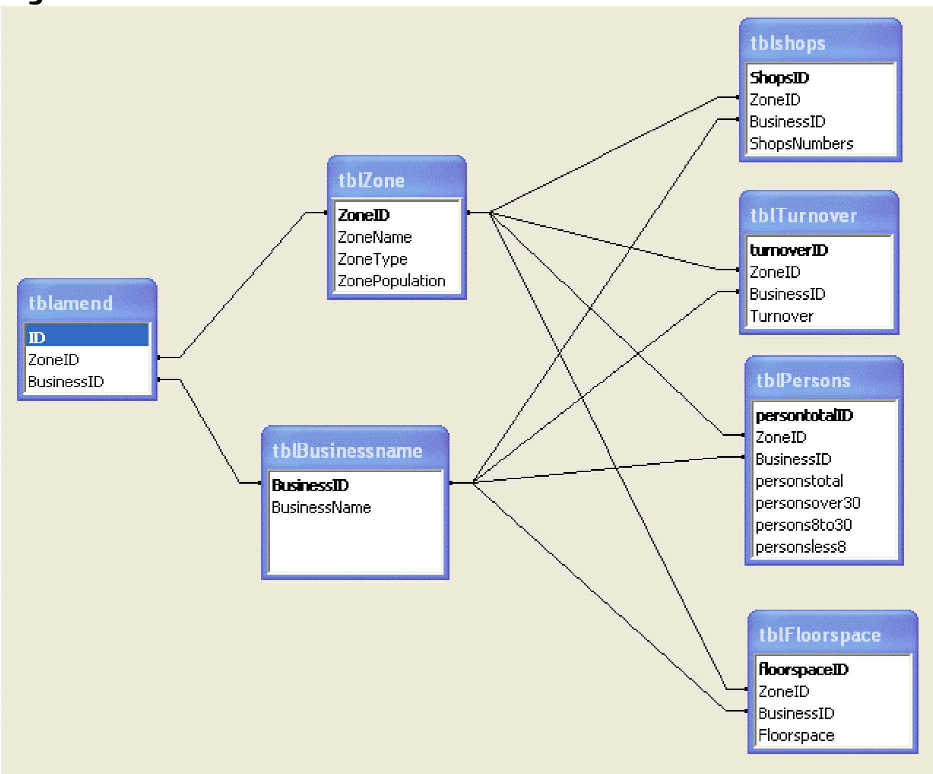
Building the database

Developing a database structure for the data was not straightforward. The data in the Census of Distribution are not arranged for ease of manipulation, but for visualisation.

Once converted into Excel, the organisation of the rows and columns remained the same. They would need to be converted into a more flexible structure for analysis. Furthermore, the Excel spreadsheet is not an efficient or reliable means of storing data;

a Visual Basic programme had to be written to convert the data from the digital version stored in the spreadsheet into a database.

Figure A1: The database structure



Source: CASA

In order to facilitate comparison with the recently published ODPM statistical series, the data had to be able to be queried into a basic flat-file, whereby each individual Greater London district and town centre comprised a row in the table with attribute information stored in columns. These processed data are found in the accompanying final spreadsheet on the CD ROM.

Conversion difficulties

The transfer of the data from the 230 Excel spreadsheets into a single Access database in readiness for linkage with the 2000 town centres data was not simply a matter of transferring data from cells to data tables. There were a number of additional issues that needed to be overcome.

These issues could be broadly grouped into the following categories:

- Matching the names
- Matching the descriptions of the retail economy
- Differences in floorspace data
- Handling data disclosure

Matching the names

The two datasets were linked by the names of the town centres, and the names of the districts in which they are located. No problems were encountered matching the names of the district summaries in the 1971 and 2000 datasets: the names of London's 33 boroughs are set out in statute and have not changed for many years. The naming of town centres proved more problematic, since these names are not officially defined.

Of the 104 town centres defined in the 1971 Census of Distribution, CASA were able to identify only 100. The four town centres present in the 1971 series but not in the 2000 data were Manor Park, Shepherd's Bush, Sidcup Station Road and Whitton.

The 100 that were identified are listed in Appendix B of this report. In 25 instances, the names of the town centres have changed somewhat between the two data series.

On the whole a one-to-one matching exercise was feasible, although in the case of Ealing, the 1971 Census of Distribution defined two distinct town centres – West Ealing and Ealing Broadway – which have been merged in the 2000 series.

The key reason for matching the names as a starting point for this comparison is that the 1971 Census of Distribution provided no information on the geographical extent of the town centres. The exception to this is Central London, for which a very rough boundary was defined in 1971. This was able to be replicated and statistics from the ODPM's 2000 database were extracted, so in this instance, the boundary definition remains the same.

Matching the descriptions of the retail economy

Once the town centres in both series had been matched, it needed to be ensured that the statistics recorded for each town centre in both series were comparable.

The 2000 series divided the retail economy into three components:

- Convenience retailing
- Comparison retailing
- Service retail

The exact specifications of these are given in Appendix C.

The 1971 Census of Distribution does not aggregate retail information into the same categorisations. This is not surprising, given the structural changes that have affected the sector since then. Indeed, the service retail component is barely represented in 1971, only hairdressers being represented in both datasets.

The definitions of convenience and comparison retail have also changed to an extent. Therefore the retail classifications of the 1971 Census of Distribution have been aggregated in the following way:

Table A3: 1971 Census of Distribution convenience and comparison retail aggregations

Convenience retail	Comparison retail
Grocers and provision dealers	Clothing and footwear shops
Other food retailers	Household goods shops
Confectioners, tobacconists, newsagents	General stores
Chemists, photographic dealers	Other non-food retailers Bookshops and stationers Cycle and perambulator shops Jewellery, leather and sports goods shops Other non-food shops

Source: CASA

On the whole, it was possible to match the retail categories of the 1971 Census of Distribution with those of the 2000 series, with the exception of 'Chemists and photographic dealers'.

In the 1971 series, *Chemists and photographic dealers* were viewed as comparison retailers, whereas in the 2000 series, chemists are classified as convenience retailers (photographic dealers remain classed as comparison retail).

This presented a problem, since there was no way to subdivide chemists from photographic dealers in the 1971 series, while the two are far more distinct on today's high street. *Chemists and photographic dealers* have therefore been classified as convenience retail to enable the datasets to be compared.

Floorspace data

The floorspace of retail establishments was measured differently in 1971 and 2000. Not only had the 1971 floorspace data to be converted from square feet to square metres to match the 2000 dataset, which was readily done, but also retail floorspace itself was defined differently in the two data series.

The 1971 Census of Distribution defined retail floorspace as being:

> *'… confined to that used for selling and display only. It is defined as that area used for selling to customers, including the space to which customers have access, counter space, window and other display space, fitting rooms and space immediately behind counters used by shop assistants. It excludes offices, storage and preparation rooms, work rooms, lobbies, staircases, cloakrooms, and other amenity rooms.'*

Whereas the 2000 definition uses the Valuation Office Agency's (VOA) definition of retail floorspace: that which

> *'…serves the public 'off the street'. The class includes (but is not confined to) banks, building society outlets, betting shops, hairdressers and beauty salons, pharmacists, launderettes and dry cleaners, post offices, real estate agents, tax consultants, travel agents, ticket sales, takeaways bars, restaurants, cafes, wine bars, food courts, amusement arcades, showrooms, hyper markets, retail warehouses, superstores and department stores. Also included are markets, car sales showrooms and sales yards, shops selling car parts, farm and factory shops, hobby shops, kiosks, booths, photo booths, craft workshops that display and sell goods and street front repair shops. Some health centres may be valued as retail. The bulk class includes some wholesale premises (others are typically warehouses).'*

This presents a significant problem since the former type of space will always be smaller than the latter for two key reasons:

Firstly, the VOA's definition of retail floorspace includes the financial and business services as well as food and drink outlets, establishments not included in the 1971 Census. This problem can be circumvented to some degree by comparing the Census data with the A1 floorspace totals included in the 2000 series. However, it should be noted that this category not only includes floorspace not explicitly included in the 1971 Census (such as post offices), but also that the A1 total is an estimate derived from the VOA dataset.

The second issue concerns the definition of space within retail units. The floorspace recorded in the 1971 Census comprises that used 'for selling and display only', whereas the 2000 definition includes other areas such as lobbies, staircase and storage areas. On-going research undertaken by UCL's Bartlett Graduate School suggests that ratio between the two is typically 0.63: 1 respectively.

This factor has been applied across the full A1 dataset, to attempt to derive a comparable indicator, although it is acknowledged that this is a simplification and that in some parts of the capital, the ratio of sales space to off-the-street area (which includes lobbies, staircases, cloakrooms, and other amenity rooms) may be different.

Data disclosure

The final issue was that data for some retail classifications was not released in the 1971 Census of Distribution.

This occurred due to data disclosure restrictions. At the town centre scale, to release information (such as the number of employees employed in department stores, for example) might reveal confidential information about a particular business. On these occasions, the data aggregations were not released and the data were flagged as '*'.

Without this data, the convenience and comparison retail aggregations became difficult to derive. In many instances, it was possible to create accurate aggregations using sub totals in the Census of Distribution tables, but for three town centres, Bexleyheath, Clapham Junction and Stratford, it was necessary to estimate the numbers for *Chemists and photographic dealers* using Greater London averages.

The percentages of total used were:

- 4.1 per cent for the number of shops
- 4.6 per cent for turnover
- 4.8 per cent for employment
- 2.7 per cent for floorspace.

Using these it was possible to directly compare employment and floorspace totals for 33 London boroughs and 100 town centres with those published for 2000.

Appendix B: The names of 100 town centres in 1971 and 2000

1971 Name (Town centre)	2000 Name (Town centre)
Acton	Acton
Angel	Angel, Islington
Archway	Archway
Leyton Green	Bakers Arms
Balham	Balham
Barking	Barking
Chipping Barnet Green	Barnet
Bayswater	Bayswater
Bexleyheath	Bexleyheath
Brixton	Brixton
Bromley	Bromley
Burnt Oak, Edgware	Burnt Oak
Camberwell Green	Camberwell
Camden Town	Camden Town
Catford	Catford
Chingford Mount	Chingford Mount
Chiswick	Chiswick
Clapham High Street	Clapham
Clapham Junction	Clapham Junction

1971 Name (Town centre)	2000 Name (Town centre)
Cricklewood	Cricklewood
Croydon	Croydon
Kingsland, Hackney	Dalston
Deptford	Deptford
Ealing Broadway	Ealing
East Ham	East Ham
East Sheen	East Sheen
Edgware	Edgware
Eltham	Eltham
Enfield Town	Enfield
Church End, Finchley	Finchley
Finchley Road	Finchley Road, Swiss Cottage
Finsbury Park	Finsbury Park
Forest Gate	Forest Gate
Fulham	Fulham
Golders Green	Golders Green
Mare Street, Hackney	Hackney
Hammersmith Broadway	Hammersmith
Harlesden	Harlesden
Harrow	Harrow
Hayes	Hayes Town

1971 Name (Town centre)	2000 Name (Town centre)
Holloway	Holloway Road
Hornchurch	Hornchurch
Hounslow	Hounslow
Ilford	Ilford
Kensington High Street	Kensington High Street
Kentish Town	Kentish Town
Kilburn	Kilburn
King's Road, Chelsea	Kings Road, Chelsea
Kingston upon Thames	Kingston-upon-Thames
Knightsbridge	Knightsbridge
Lewisham	Lewisham
Leytonstone	Leytonstone
Edmonton Green	Lower Edmonton
Mitcham	Mitcham
Morden	Morden
New Malden	New Malden
Norbury	Norbury
North Finchley	North Finchley
Orpington	Orpington
Palmers Green	Palmers Green
Rye Lane, Peckham	Peckham

1971 Name (Town centre)	2000 Name (Town centre)
Purley	Purley
Putney	Putney High Street
Richmond	Richmond, London
Romford	Romford
Ruislip	Ruislip
Sidcup, High Street	Sidcup
South Norwood	South Norwood
Southall	Southall
Southgate	Southgate
Stoke Newington road	Stoke Newington
Stratford	Stratford
Streatham	Streatham
Surbiton	Surbiton
Sutton	Sutton
Teddington	Teddington
Thornton Heath	Thornton Heath
Tolworth	Tolworth
Tooting Broadway	Tooting
Tottenham	Tottenham
Twickenham	Twickenham
Upminster	Upminster

1971 Name (Town centre)	2000 Name (Town centre)
Upper Edmonton	Upper Edmonton
Westow Hill and Upper Norwood	Upper Norwood
Upton Park	Upton Park
Uxbridge	Uxbridge
Wallington	Wallington
Walthamstow	Walthamstow
Walworth	Walworth
Wandsworth High Street	Wandsworth
Wealdstone	Wealdstone
Welling	Welling
Wembley	Wembley
Willesden Green	Willesden Green
Wimbledon	Wimbledon
Wood Green	Wood Green
Woolwich	Woolwich
Worcester Park	Worcester Park
Yiewsley and West Drayton	Yiewsley

Source: CASA

Appendix C: Convenience and comparison retail definitions in 2000

The Office for National Statistics' Annual Business Inquiry, which is used to derive employment data in the ODPM's 2000 series, uses the UK Standard Industrial Classification of Economic Activity (SIC) to classify business establishments by the type of economic activity in which they are engaged. The following groupings of SIC codes were used to create the categories of retailing:

Convenience Retail
52110 Retail sale in non-specialised stores with food, beverages or tobacco predominating
52111 Retail sale by confectioners, tobacconist and newsagents
52119 Retail sale in non-specialised stores with food, beverages or tobacco predominating not elsewhere classified
52210 Retail sale of fruit and vegetables
52220 Retail sale of mean and meat products
52230 Retail sale of fish, crustaceans and molluscs
52240 Retail sale of bread, cakes, flour confectionery and sugar confectionery
52250 Retail sale of alcoholic and other beverages
52260 Retail sale of tobacco products
52270 Other retail sale of food, beverages and tobacco in specialised stores

Comparison Retail
52120 Retail sale in non-specialised stores where food, beverages or tobacco does not predominate
52310 Dispensing chemists
52320 Retail sale of medical and orthopaedic goods
52321 Retail sale of hearing aids
52329 Retail sale of medical and orthopaedic goods not elsewhere classified
52330 Retail sale of cosmetic and toilet articles
52410 Retail sale of textiles
52420 Retail sale of clothing
52421 Retail sale of adults' fur and leather clothing
52422 Retail sale of children's and infants' clothing
52423 Retail sale of other women's clothing
52424 Retail sale of other men's clothing
52430 Retail sale of footwear and leather goods
52431 Retail sale of footwear
52432 Retail sale of leather goods
52440 Retail sale of furniture, lighting equipment and household articles not elsewhere classified
52450 Retail sale of electrical household appliances and radio and television goods
52460 Retail sale of hardware, paints and glass
52470 Retail sale of books, newspapers and stationery
52481 Retail sale of floor coverings
52482 Retail sale of photographic, optical and precision equipment, office supplies and

equipment (computers etc.)
52483 Other retail sale in specialised stores not elsewhere classified
52484 Retail sale of sports goods, games and toys, stamps and coins
52485 Retail sale of sports goods, games and toys, stamps and coins
52489 Other retail sale in specialised stores not elsewhere classified
52500 Retail sale of second-hand goods in stores
52630 Other non-store retail sale

This definition excludes
52610 Retail via mail order houses
52620 Retail sale via stalls and markets
since they were either too large and likely to skew statistics (as in the case of mail order houses) or that they were not inclusive (many street markets are not included on the ABI).

Service Retail (Not used in this study – for reference only)
52700 Repair of personal and household goods
52710 Repair of boots, shoes and other articles of leather
52720 Repair of electrical household goods
52730 Repair of watches, clocks and jewellery
52740 Repair not elsewhere classified
60220 Taxi Operations
63301 Activities of travel agents
63302 Activities of travel organisers
63303 Activities of tour guides
63304 Miscellaneous tourist assistance
63309 Other tourist assistance activities n.e.c.
64120 Courier activities other than national post activities
71401 Renting of sporting or recreational equipment
71402 Renting of other personal and household goods not elsewhere classified
71403 Renting of radios, televisions and video recorders
71404 Renting of video tapes, records and other pre-recorded media
71405 Renting of video tapes
71409 Renting of other personal & household goods n.e.c.
74812 Portrait photographic activities (excluding operation of photo coin-operated machines)
74819 Miscellaneous photographic activities (excluding portrait photography)
93010 Washing and dry cleaning of textile and fur products
93020 Hairdressing and other beauty treatment
93030 Funeral and related activities
93050 Miscellaneous service activities

This category excludes 74811 (Operation of photo coin-operated machines) since while these machines are often found in town centres, the offices that run them may not necessarily be so.

Abbreviations and definitions

Abbreviations

CASA	Centre for Advanced Spatial Analysis
m^2	Meters squared
OCR	Optical character recognition
ODPM	Office for the Deputy Prime Minister
SIC	Standard Industrial Classification of Economic Activity
TC	Town centre
UCL	University College London
UK	Untied Kingdom
VOA	Valuation Office Agency

Definitions

A1 floorspace – All land type used for employment purposes is defined by Use Class Orders. A1 refers to 'General Shops' in this categorisation.

Britain – England, Wales and Scotland (excluding North Ireland).

Central London ATCA – In this report, the Central London Area of Town Centre Activity has been based on the geographical boundary defined in the 1971 Census of distribution, with data for 2000 extracted from the ODPM's town centre statistics database such that the same boundary definition was used.

Central London sub-region includes the London boroughs of Camden, Islington, Kensington and Chelsea, Lambeth, Southwark, Wandsworth and Westminster.

Comparison retail employment – Comparison retail comprises clothing, footwear, household appliances (electric or gas), carpets, furniture, computers, books, music/videos, toys, DIY equipment, audio-visual equipment, sports equipment, and leisure goods.

Convenience retail – see grocery retail.

East sub-region includes the London boroughs of Barking and Dagenham, Bexley, City, Greenwich, Hackney, Havering, Lewisham, Newham, Redbridge and Tower Hamlets.

Greater London is the area covered by the 32 London boroughs and the City of London.

Grocery/Convenience retail – Convenience retail stores are those that sell food, drink, tobacco, household goods and newspapers/magazines. In this paper, the more familiar term of *grocery retail* is used to describe convenience retail.

Inner London includes the London boroughs of Camden, City of London, Hackney, Haringey, Hammersmith & Fulham, Islington, Kensington & Chelsea, Lambeth, Lewisham, Newham, Southwark, Tower Hamlets, Wandsworth, Westminster.

Inner London (excluding Central London ATCA). Includes all the boroughs of Inner London but excludes those areas of the boroughs within the Central London ATCA. This distinction between Inner London and Inner London (excluding Central London ATCA) is made in order to be able to observe how the Central London ATCA impacts upon the remainder of Inner London.

North sub-region includes the London boroughs of Barnet, Enfield, Haringey and Waltham Forest.

Outer London includes the London boroughs of Barking & Dagenham, Barnet, Bexley, Brent, Bromley, Croydon, Ealing, Enfield, Greenwich, Harrow, Havering, Hillingdon, Hounslow, Kingston, Merton, Redbridge, Richmond, Sutton and Waltham Forest.

Service retail employment – Service retail includes travel agents, rental shops, hairdressers, launderettes and dry cleaners, mini cab offices, photography shops, and repair shops.

South sub-region includes the London boroughs of Bromley, Croydon, Kingston, Merton, Richmond and Sutton.

West sub-region includes the London boroughs of Brent, Ealing, Hammersmith & Fulham, Harrow, Hillingdon and Hounslow.

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Chinese

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Hindi

यदि आप इस दस्तावेज की प्रति अपनी भाषा में चाहते हैं, तो कृपया निम्नलिखित नंबर पर फोन करें अथवा नीचे दिये गये पते पर संपर्क करें

Vietnamese

Nếu bạn muốn có văn bản tài liệu này bằng ngôn ngữ của mình, hãy liên hệ theo số điện thoại hoặc địa chỉ dưới đây.

Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি (কপি) চান, তা হলে নীচের ফোন্ নম্বরে বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

Greek

Αν θέλετε να αποκτήσετε αντίγραφο του παρόντος εγγράφου στη δική σας γλώσσα, παρακαλείστε να επικοινωνήσετε τηλεφωνικά στον αριθμό αυτό ή ταχυδρομικά στην παρακάτω διεύθυνση.

Urdu

اگر آپ اِس دستاویز کی نقل اپنی زبان میں چاهتے هیں، تو براہ کرم نیچے دئے گئے نمبر پر فون کریں یا دیئے گئے پتے پر رابطه کریں

Turkish

Bu belgenin kendi dilinizde hazırlanmış bir nüshasını edinmek için, lütfen aşağıdaki telefon numarasını arayınız

Arabic

إذا أردت نسخة من هذه الوثيقة بلغتك، يرجى الاتصال برقم الهاتف أو مراسلة العنوان أدناه

Punjabi

ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਹੇਠ ਲਿਖੇ ਪਤੇ 'ਤੇ ਰਾਬਤਾ ਕਰੋ:

Gujarati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં જોઇતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.

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