A geographical study of retail trade and of business districts in English county towns - an examination of regional and urban variations

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A GEOGRAPHICAL STUDY OF RETAIL TRADE, AND OF BUSINESS DISTRICTS IN ENGLISH COUNTY TOWNS -

An examination of Regional and Urban Variations

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A thesis submitted for examination for the Degree of Doctor of Philosophy of the University of Durham, January 1963.

PREFACE

This thesis could not have been written without the help of innumerable people, most of whom I am unable to acknowledge, as I would desire, for trade reasons. The reader of this thesis will appreciate my debt to those retailing organisations (especially in Chapter Five) which have made data available to me. The depth of my analyses has been largely dependent on what organisations have been able to provide.

I would like to acknowledge the help of a number of individuals:-

Mr. Cynog-Jones, Research Officer of the Union of Shop, Distributive and Allied Workers, for his suggestions of source material.

Mr. J.A. Hough, Research Officer of the Co-operative Union, for source materials.

Mr. W.G. McClelland, Managing Director of Laws Stores Ltd. and Research Fellow in Business Studies, Balliol College, Oxford, for his interest and general encouragement.

Professor W.B. Fisher for the privilege of using the excellent research facilities of his Department.

Members of Staff of the Durham Department for their ever willingness to listen and advise.

Mr. H. Bowen-Jones for providing far more inspiration than one might normally expect from a supervisor.

My wife for continual encouragement.

THE EUROPEAN PATTERN : A NOTE

This thesis studies retailing in Great Britain, but its methods of approach and techniques of analysis may be extended to other countries. International comparisons, however, are notoriously difficult in the distributive trades, for both obvious and more obscure reasons. During the final stages of the compilation of the thesis such comparison has become possible as a result of the work of Jefferys and Knee* (Table A). This note attempts to interpret this standardised data, published in November 1962, in relation to the findings of the thesis as a whole.

A major subject of study in this thesis is large shops (high average sales per retail establishment). Jefferys and Knee have suggested that variations between the countries of Europe might be explained in terms of four factors:-

(a) The number of inhabitants per establishment.
(b) The number of employees per establishment.
(c) Private expenditure per capita.
(d) The structure of the trade.

This thesis has found that in Britain two particular factors account for the distribution of large shops: the importance of medium sized towns in the settlement pattern, and of multiple traders in the retail sales of an area. Diagrams A and B show the relationship of these two factors to the size of shops in those countries of Europe with annual per capita private consumption expenditure of over 415 dollars

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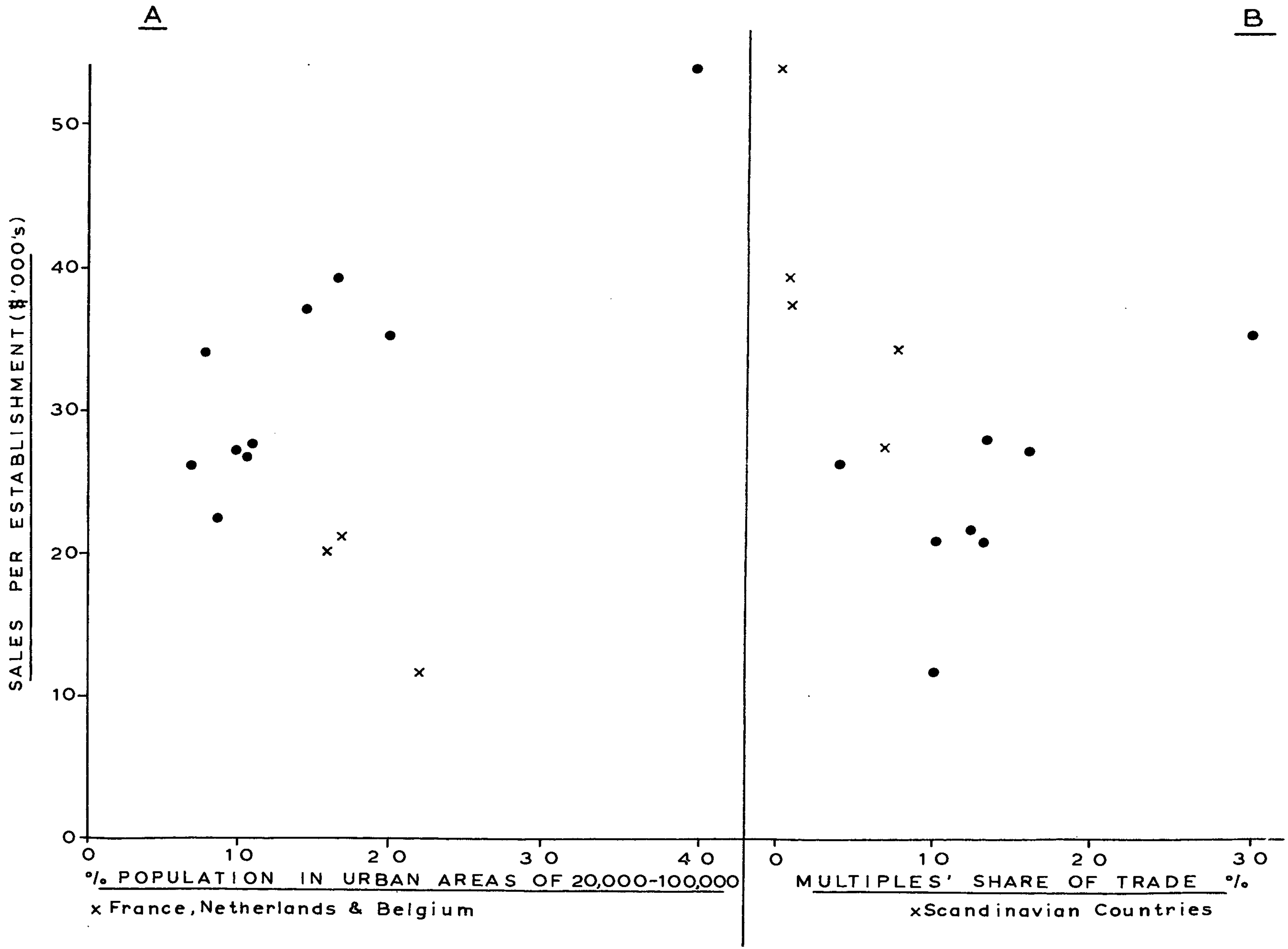
* Jefferys, J.B. and Knee, D. Retailing in Europe: Present Structure and Future Trends. London 1962.

(the rest of Europe has too dissimilar economic landscapes to make comparison profitable).

The relationship between the size of shop and the proportion of the population in towns between 20,000 and 100,000 is close for the countries of Northern Europe. Only three countries are notably divergent, having smaller shops than their urban structure would warrant. These are however Belgium, France and the Netherlands, suggesting that different consumption habits and economic conditions in this part of Europe are important.

The second relationship is far less marked. A relationship does however exist if the Scandinavian countries are isolated from the rest of Europe, for in these countries the great importance of Co-operative Retailing makes comparisons based on trade structure somewhat unreal. Austria is an exception for which no ready explanation can be given. A direct relationship between the two variables exists in the cases of the U.K., Switzerland, West Germahy, Netherlands, France and Ireland.

Jefferys and Knee have given a descriptive account of the variations in the size of shops. If causal explanations are to be found it is essential to examine the geographical pattern of retailing, the towns in which most shopping takes place and where large scale organisations set up their branches. It is clear that in order to explain the regional variations noted above much detailed examination would be needed. The study of retailing is also seen to be relevant to the examination of


A
B
SALES PER ESTABLISHMENT ($'000's)
50
40
30
20
10
0
10
20
30
40
% POPULATION IN URBAN AREAS OF 20,000-100,000
x France, Netherlands & Belgium
0
10
20
30
MULTIPLES' SHARE OF TRADE %
x Scandinavian Countries

regional patterns which may not otherwise statistically be apparent.

Table A. RETAILING IN EUROPE

(Most of Data from Jefferys and Knee)

	1	2	3	4	5
1. Countries With Per Capita Expenditure Over $ 415.					
Austria	92	26,118	4.0	1.0	7
Belgium	34	11.497	3.2	10.8	22
Denmark	73	27,688	9.0	6.8	10
Finland	123	37,321	35.0	1.0	15
France	57	20,253	2.7	13.0	16
Iceland	158	54,736	32.0	0.0	40
Ireland	83	21,371	3.0	10.0	9
Netherlands	65	21,536	2.0	12.8	7
Norway	97	39,320	14.5	6.3	17
Sweden	82	34,123	13.5	8.0	8
Switzerland	70	27,264	9.7	16.0	10
U.K.	86	35,738	11.0	30.6	20
West Germany	84	27,906	2.8	13.2	11
2. Countries With Per Capita Expenditure Under $ 320.					
Greece	84	6,970	*	*	15
Italy	59	10,320	2.7	2.1	17
Portugal	89	8,969	*	*	5
Spain	105	13,611	*	*	13

* No Data

1. Population Per Establishment

2. Sales Per Establishment ($ at Average European Prices)

3. % of Retail Sales by Co-operative Societies

4. % of Retail Sales by Multiple Traders

5. % of Population in towns with population between 26,000 and 100,000

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Note:-

(i) Tables are placed at the nearest convenient place in the text, except those which are numbered with two numerals (rather than one numeral and a letter) or those which are marked with an asterisk, which are placed at the end of a chapter or sub-section.

(ii) Figures are found in volume two.

INTRODUCTION

"The individual fact enters (into a geographic study) with a degree of importance that increases with the extent to which it is interlaced, on many sides, and internally, with neighbouring circles of phenomena."

R. Gradmann, quoted by R. Hartshorne, Nature of Geography 1939, p. 242.

"Investigation may demonstrate that .... the topic selected shows little relation in its areal variation to those of other phenomena and hence is of but minute importance to the totality of areal variation. Such a study therefore contributes primarily to knowledge about the phenomena in itself, this is, it is of concern to the systematic science in which the phenomenon is classified."

R. Hartshorne, Perspective on the Nature of Geography 1959, p. 38.

"By speaking of "functional" regions, we make regional geography more realistic to the man in the street."

F.H.W. Green, Economic Geography, 1958, p. 226.

"It is of no importance that the phenomena considered have no traditional place in geography. In fact the objects themselves are not the centre of observation. They are used as indicators of people's ways of behaving with regard to the relative location of dwelling places."

Tovsten Hägerstvand, Lund Studies in Geography No. 4, p. 4.

This work is a study of the distribution of a number of economic and social phenomena which constitute the retail trades, phenomena which are perhaps not normally regarded as an integral part of the field of geography[1]. The ubiquity of shops when compared with the concentration of other types of economic establishments, particularly the plants of heavy industry, has meant that this, the final stage of the productive process, has received relatively little attention from geographers. It will however emerge that there are real variations in retailing, which are closely related to other geographical variations in the regions and towns of Great Britain. Such variations are of the core of geography, and might well be incorporated in regional geographies. Other variations, although inter-related with environmental phenomena, are of less direct geographical significance, but nevertheless are fundamental for a true understanding of the nature of the retail trades. It must be the geographer's task to present an account of how these are influenced by environment, so that those without his

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1 The existence of a geography of retailing has best been put to the author by one leading retailer who showed no surprise at the term, for he has as a retailer "to be constantly aware of geography."

background knowledge of spatial variations may be able to place the geographical factor in true perspective.

In a research report it is legitimate to intertwine these two major themes. A realistic economic geography, in the full sense of the subject, cannot do otherwise. The comprehension of geographical variations depends on a close knowledge of all aspects of trading.

In covering a field which includes over 531,000 separate establishments the student is beset with problems of the availability of data and of presentation.

Regional groupings of published data are often not the most suitable for an analysis of a particular aspect of trading. Regional terminology varies, in particular in the case of retailing between the Registrar General's standard regions and the regions of the Co-operative Union. Here however, uniformity of terms is adopted whenever possible (see Appendix A).

Statistical data is severely limited. Before 1950 no accurate count of Britain's shops existed. In 1953 however a full geographical breakdown was published of the 1950 Census of Distribution returns. Unfortunately this was not repeated in 1957 when only a national sample survey was conducted. In 1963/4 the publication of the results of the 1961 Census of Distribution should make possible most useful comparisons. It seems particularly important therefore that a full understanding of the implications of the areal variations existing in 1950 should be available for those who work on the 1961 figures, even though many of the interpretations advanced may be shown to be at least highly suspect - the result of temporary disequilibrium of a particular economy.

Data are not always available in the form that is most useful to the geographer. Although some classification of trades must be adopted, sometimes it would be useful to have fuller details than the Census classification (see Appendix B) provides. The Census definition of organisations is particularly difficult to use for the Board of Trade adopted a narrow view of an organisation, defining it as an undertaking operating one or more establishments within the scope of the Census, classifying subsidiary companies, except where there is very close integration of activities, as separate organisations, and separating whenever possible the activities of one organisation in two different trades. In fact in much of the text (i.e. where Census figures are not being used) the term is generally used in a wider sense, to include subsidiaries.

In presentation of the work two major considerations have arisen. The first, and most fundamental, is that since retailing is near/ubiquitous geographical variations are almost always one~~s~~ of intensity rather than absolute contrast. Much geographical writing ignores such real variations. Hägerstrand's[2] statement seems particularly apposite here: "Nowadays the culture elements appear less and less frequently in mutually exclusive regions ..... Instead we must ascertain the spatial distribution of ratios." This characteristic of the geography of retailing necessitates constant reference to statistics and distribution maps. Without reproducing almost all the Census of Distribution in numerous cross tabulations, it is impossible to illustrate all existing geographical variations. Rather, the most typical and most significant have been selected to show, in what ways, a fuller understanding of both retailing and the geography of Great Britain may be gained from the Census. Much still remains to be done; it is considered that this is a field which should be, and is, receiving more attention from those who seek a realistic applied geography and a modern commercial geography.

The wide scope of the thesis has made it necessary for there to be one focus which it was possible to return

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2 T. Hägerstrand "The propogation of Innovation Waves" Lund Studies in Geography, Series B, No. 4, p. 4.

to from time to time. This focus is given particular attention in the concluding chapter. It has taken the form of a sample study of one type of town, which is particularly distinguishable from others of similar size by the character of its retailing. This is the County Town. Initially in the research project a comparative study of these towns revealed the impossibility of discussing with any adequacy the pattern of their trade, without a full study of the national pattern. As the project has developed it has been found possible to summarise this character in a very succinct form (chapter eight). Similarly studies of other types of town might show their character; County Towns are used here both as a convenient conclusion and as a methodological experiment. ?

County Towns are defined as those places which are regional centres of rural areas, not as important as regional capitals, but more important than market towns. The term is in fairly common usage[3], and does not necessarily imply any particular administrative function. ?

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3 E.G. The Times, Sept. 24th 1961 referring to Canterbury (not the administrative capital of Kent which is Maidstone) "Shopkeepers thrive in County Town conditions.

Twelve towns were selected for initial study, and seven were finally chosen as being most typical: Carlisle, Lincoln, Worcester, Shrewsbury, Salisbury, Hereford and Taunton.

The major part of this study considers regional, urban and organisational variations (in intensity) of the pattern of retailing. The first of these speak for themselves, given the regional units on which analysis has to be based. The others are rather more complex.

Urban variations in retailing are assessed by, and themselves assess, existing comparative knowledge of towns in Great Britain. Two major series of existing studies may be distinguished. There is first the work associated especially with Smailes, which assesses the significance of a town (or of a shopping centre) by the presence in that place of a number of features which indicate urban stature. Second there are the studies of Green and Carruthers, which assess the importance of a town as a centre for a surrounding area, using as their criteria an indirect measure - its bus services. Two major differences may be noted between these studies, one is in terminology and the other in the number of sub-divisions. The terminology of these studies is set out, together with the terms suggested by Brookfield[4], in tabular form below:-

Smailes	Carruthers & Green	Brookfield
Metropolis	1	Metropolis
Major Cities	2A	Major Cities
	2B	Cities
Minor Cities	3A	Major Regional Centres
Major Towns	3B	Minor Regional Centres
	3C	Major towns
	3 General	Minor towns
Towns	4A	Towns
	4B	Sub Town
Sub Towns	4C	Local Centre

Brookfield considered that "city" is an inappropriate term for any town of less significance than a "Major City" to Smailes, and that only Manchester, Glasgow, Liverpool, Birmingham and possibly Edinburgh warrant the full term of Major City. His "regional centres" are either major centres like Brighton, Portsmouth, Southampton or Exeter, or minor ones like Guildford or Maidstone. This would seem to be fairly realistic, so it is particularly interesting to note how easily his terms fit Carruthers' Classes of centre. Thus although the latter used an indirect scheme of evaluation it may well approximate more precisely than Smailes' classification to a reality

4 H.C. Brookfield, A Regional Study of Urban development in coastal Sussex since the eighteenth century, unpublished thesis, London, Ph.D. 1950.

of the hierarchy, particularly if attention is mainly directed to retail shopping. The second difference between the classifications is the inability of Smailes' scheme to divide such a diverse group of towns as that forming the "Minor City, Major Town" class. This is particularly unfortunate for it is within this group that some of the most important variations in retailing may be distinguished. In consequence Carruthers's classification is adopted for much of the analysis attempted in the thesis. It is set out in Appendix C. The variations in classification of the hierarchy which appear to exist require fuller examination, so one of the themes of this work is to show to what extent that data from retailing, including the Census of Distribution, can give further precision to these classifications.

In Section Three, retailing organisations are examined so that more of the real factors which determine store locations may be examined. McKnee[5], in some most interesting pioneer studies, has shown how a realistic economic geography, in mid-twentieth century economies, must be concerned with the corporations which make location

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5 R.B. McKnee, Toward A More Humanistic Economic Geography, The Geography of Enterprise, Tijdschrift voor Economische en Sociale Geografie 1960, Vol. 51, pp. 201-206.

decisions. In retailing where "fixed resource" situations do not exist such an approach is essential. Indeed each organisation has its own geography, and it is really only by understanding in full what that is, that the geography of retailing may progress.

Linking the two sides of the thesis (one showing the wider significance of retailing to geography, and the other examining the geographical factors behind retailing) is one characteristic of retailing which is shown to be most significant both geographically and economically. This is the size of shops. Large shops are particularly prominent features of an urban landscape, and they may well indicate the quality of the goods which may be purchased in a particular centre (a matter of no little importance as can be judged from the number of times that the term "a good shopping centre" occurs in everyday usage!). To the economist the size of shops is one of the most useful measures of output in retailing[6]. As Hall has said most other indicators are "too much associated with particular ways of carrying out the job of retailing as with transactions, or too much involved with broad questions of community valuations as with margins or value

6 M. Hall, J. Knapp and C. Winsten, Distribution in Great Britain and North America, 1961, p. 45.

added."

Large shops, in addition to being of special interest in these ways are also indicators of large scale organisations, multiples and co-operatives, and therefore form an important link between Sections Two and Three. Furthermore County Towns are distinguished from all other types of town by a large average size of shop.

Academic studies of retailing are not numerous. The most important to this study is J.B. Jefferys's "Retail Trading in Great Britain, 1850-1950". This includes a number of telling geographical interpretations of the growth of particular trades. An immeasurable debt to it must be acknowledged, and it can only be hoped that this thesis may go a little way to fill out knowledge of parts of retailing which were not within its scope.

References

Most references are given in full. Certain frequently occurring ones, are abbreviated. These are however listed in the Bibliography.

SECTION ONE

THE REGIONAL PATTERN OF RETAILING.

CHAPTER ONE

THE GENERAL PATTERN OF RETAIL TRADING

Retail trading in Great Britain exhibits broad regional differences as well as purely local variations, but it is not possible to present more than a general analytic description of these geographical variations for several reasons. First, the major source of evidence for general trading conditions, the Census of Distribution 1950 is not sufficiently regionally detailed to allow an exhaustive geographical analysis, while the regional sub-divisions presented are too large and insufficiently homogeneous to allow conclusive explanations of differences between them to be made.

Secondly, retail trading is carried out by various types of organisation each with its own history of functional evolution. These histories are still largely undocumented, and therefore fully satisfactory accounts of present-day distribution patterns of organisation cannot be given.

Thirdly, the "shop", the essential subject matter of any study of retail trading, and particularly of a geographical study, has not only numerous functional variants, but is located by determinants which are themselves largely conjectural, except where detailed local studies have helped to identify them.

Nevertheless, it is necessary before entering into an investigation of local variations and of particular organisations, that some attempt to sketch and interpret the broader patterns should be made, bearing in mind that while this has its dangers, it is only on such a scale that some of the elements can be at all examined. The regional units that this study is to utilise throughout are the Registrar General's Standard Regions as defined in appendix A. In places it has been found convenient to group regions geographically, the two most frequent groupings being: Northern England, which includes the Standard Regions of the North, East and West Ridings, the North-West and, sometimes, the North Midlands; and Southern England, which includes the Standard Regions of the East, Greater London, the South-East, the South and, sometimes, the South-West.

For the distributive trades as a whole, which generally are divided into the retail trades and the service trades, Sleeman[1] has shown that Scotland has the smallest ratio of shops to population but is similar, in this respect, to the North, the South and London. He noted that

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1 J. Sleeman, Retail Distribution: Some Regional Comparisons, Scottish Journal of Political Economy, Vol IV, 1957, pp 225-229.

"the real contrast which emerges is that between the industrial areas of Lancashire, Yorkshire, the Midlands and Wales, and the rest, for it is these areas, together with the South-East, which have the pattern of a large number of shops." This statement exemplifies the sort of distinction which is important in all aspects of retailing. It finds expression in numerous ways, but is almost always of some significance. The difference may be found in the ownership of a region's shops or in their trade types. It may be expressed in the numbers of a particular type to be found there, in the average size of the turnover of a particular group of shops, or in the total expenditure of a population in the shops of a particular trade type. It may also be a reflection of the purchasing power of a community, but this is one aspect which will only be referred to here in passing for it raises numerous questions beyond the scope of this study, which concentrates on the various expressions of consumer demand in the pattern of an area's shops rather than on the goods finally consumed.

The distinction which Sleeman[2] makes is partly true for retailing in general, but as the establishments of the

2 Sleeman op..cit., does not distinguish retail from service trades, yet calls his subject "Retail Distribution". The problem of definition is great in this field but is vital if conclusive analyses are to be made.

service trades have a distribution pattern dissimilar to that of retail shops (i.e. establishments that retail manufactured goods or food, rather than supplying personal services, as their prime function), some of the variations which are important in retailing are hidden in the pattern of the distributive trades as a whole. Service trades are especially a feature of prosperous areas so retail establishments are relatively more common than all distributive establishments in regions like Wales, Scotland and the North. The actual frequencies are set out in Table 1, it is noteworthy that the very high frequency of shops in the North-West (1 to 76 people), where they are most common, compares with one to 70 people in Ireland, one to 91 people in Denmark, one to 125 in Canada, and one to 130 in the U.S.A.

An examination of the regional variations in frequency illustrates the sort of difficulties which confront this study. The general distinction is clear enough, but why Scotland should have so few shops, when at first sight it would seem to be comparable with the English industrial regions, is something of a problem, especially as Sleeman[3] notes that within Scotland "the prevalence of a comparatively small number of relatively large shops is found to be characteristic of the industrial areas rather than of

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3 Sleeman op. cit.

the rural areas, and in particular of the central West region." One partial key to the problem is the high frequency of large co-operative shops in Scotland and in the North, where there is a similar low frequency of all types of shop, which makes it more difficult for small independent shopkeepers to capture a sufficient share of trade. Another is that many towns in Scotland and the North have very high densities of people per house and in consequence shops strategically situated can serve far larger groups of people, at the same personal inconvenience to the shopper, than in the country as a whole. The high density of shops in the South-East (one to 94 persons) may be explained by the urban structure of the region, the absence of a major city, and the consequent greater opportunities for small shopkeepers, and by the higher purchasing power of the region's population. This second factor is one which Hall[4] has considered to be of importance in theory for she suggests that when incomes rise the market becomes more differentiated since demand is then for more varied goods, and specialist shops can be profitable such is the level of that demand.

Expenditure per head through retail shops is, not unexpectedly, highest in London, for this is obviously

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4 Hall et al. (1961).

closely related to income. The relationship is not however a direct one, for as incomes rise it is probable that a smaller proportion finds its way into the retail trades, for other ways of spending money then become important. Evidence for this higher elasticity of demand is provided by the sales of service trades, in which the regional contrast between the highest and lowest per capita sales is 47.8% as against a corresponding contrast of 34.3% in retail sales. In fact differences in retail sales per head of population between the regions are small, since only three do not fall in the range £92.5 to £99.8 per capita. These regions are London (£122.7), the South-East (£103.3) and Wales (£80.6). The high figures of the first two of these are in all probability reflections of higher incomes, and, in the case of London, purchases by non-residents. There is little evidence ~~that~~ to suggest~~s~~ that prices for comparable goods are on balance higher in London than in the Country as a whole. Sleeman[5] accounts for the low sales of Wales in the following way: "to some extent this may be due to a tendency to shop outside, e.g. in Liverpool or Bristol, but it must also reflect either lower average incomes or more frugal spending habits." It might also be a reflection of a higher proportion of free goods in the family economy, a factor

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5 Sleeman op. cit.

which Shields[6] has shown to be of no small significance in Ireland. Unfortunately the only evidence that can be provided for this country is the National Food Survey[7], which is of doubtful utility in regional analysis as it is based on a small sample from only 50 parliamentary constituencies. It does show however that free food, from various sources, amounts to £6.25 per capita per year in Wales. Other regions which have high free supplies are the West (£5.75) and the East (£5.2), whereas in the North and Yorkshire they only amount to £0.74 and in London to £1.09. Free food is therefore of no small significance in the general trading pattern.

There is generally a fairly well marked inverse relationship between the size[8] of shops within regions and their frequency. Thus London has the largest average size of shop, having the fewest shops in relation to population, with an average annual turnover of £13,180. This pattern is also found in the remainder of Southern England, practically in the South itself. In the rest of /?

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6 B.F. Shields, An Analysis of the Irish Census of Distribution, 1951. Statistical and Social Enquiry Society of Ireland, 20, (1957-58) pp 118-135.

7 National Food Survey, 1958. Ministry of Agriculture, Fisheries and Food, H.M.S.O.

8 "The size" of a shop is always considered in this thesis in terms of annual turnover, unless there is a definite statement to the contrary.

Great Britain, except the North and Scotland, which have been seen to be different above, smaller shops are found. The smallest shops are found in Wales, where despite broad similarities with other industrial regions co-operative retailing is poorly developed and in consequence there are far fewer large shops to weight the regional average.

The general figures of the retail trades obscure many other real important differences that exist between the regions. Wider variations exist in the organisational pattern, as can be seen from the fact that differences in co-operative activity have already had to be mentioned to explain the general pattern. Similarly wide differences exist in the distribution of certain trade types. Matheson[9] noted that in Scotland "the deficiency (of shops) is more noticeable in some business groups than in others", and Sleeman[10] that for London "the excess (of expenditure) is particularly concentrated in certain trades."

Competition between different forms of organisation, independents, multiples, and co-operatives, has been a

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9 W.R. Matheson, "The retail distributive trades in Scotland", Scottish Journal of Political Economy, 3 (1956), pp 67-78.

10 Sleeman. op. cit.

marked feature of the history of retailing. Since about 1955 a new form of competition has been added to this traditional rivalry, new trading methods of self-service competing with the older counter-service. Both forms of methods economic variation have a geographical expression, as the conditions which have favoured one particular type vary from one area to another. The self-service technique is as yet poorly documented, and indeed was not included in the 1957 sample Census of Distribution. Types of organisation can be examined from the Census data.

The distribution of organisations is both a reflection and a cause of the general differences in retailing which have been examined above. The turnover per shop of multiple retailers is fairly constant in all regions, so that in these where multiples are well established it is possible to account for above average turnovers of establishments as a whole by reference to this factor. Similarly independent shops vary less in size than in frequency so in those areas where they are most frequent the average size of all shops will be smaller. Co-operative shops are most variable in both frequency and size, and so must be considered carefully for their effect on the total pattern. As yet it is only possible to sketch, in very broad terms, the reasons for variations in the concentration of organisations. They are undoubtedly partly reflections of variations in prosperity, with depressed areas tending to be avoided by multiples, and at the same time being more attractive to the independent since other ways of earning a living are less readily available in these regions. Ernest Bevin[11] said that during the depression of the 1930's "many people opened a shop as a halfway house between them and the workhouse, only to find that it brought the workhouse nearer."

The anatomy of shopping trips and the concomitant urban hierarchy will also influence the regional distribution of different organisational types. Multiple companies often demand high densities of shoppers in a centre, before one is considered suitable as a possible situation for a branch, and so ignore the more rural areas, fragmented industrial districts and suburbia. Evolution is a further major factor leading to differences, as both the co-operative movement and many of the multiples originally catered for working class customers and so were to be found in those parts of Britain which had marked concentrations of these people. In some areas however co-operatives were so strongly established as manifestations of a semi-political creed that multiples found it very difficult to attract sufficient custom from the existing co-operative shops. Department Stores like-

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11 quoted by R. Evely, The Future of Retailing, Fabian Pamphlet No. 177, 1955.

wise formerly catered for a limited section of the population which may now have some reflection in their distribution. An additional factor is that the spending power of all but the most wealthy was relatively low up till the second world war and so in many areas demand was for a very limited range of goods. Changes in spending power have been paralleled by changes in the distribution and size of population, both are advantageous to those organisations which are most flexible and are able to establish branches in the new areas of demand. This most strongly favours multiples, some but not all co-operatives, and is generally disadvantageous to independents. In some cases institutional factors intervene and the growth of multiples is controlled but such situations are rare.

The heterogeneous determinants of the pattern of retailing do not apply equally to all trades, to all sizes of organisation, or to every organisation within a size group, and they will tend to conflict one with another, so that the average figures, which are given by the Census, may obscure their presence in a particular situation. However they have formed the present patterns and every attempt will be made to distinguish them.

The classification of organisations adopted by the Census with the terms which will be applied to each type are set out in table 1.A. The utility of the division

Table 1.A Classification of Organisations

Type	Number of Branches	Name
Independent	1	Unit shops
	2-4	Small Chains
	5-9	Medium Chains
Multiples	10-24	Small Multiples
	25-49	Small Medium Multiples
	50-99	Large Medium Multiples
	over 100	Large or National Multiples
Co-operatives		

between medium chains and small multiples is extremely doubtful, particularly in those trades in which multiple organisation is poorly developed. It is however of convenience to make some such break. The terminology adopted for each type of organisation has been devised specially for this study and although some confusion could arise from the use of the term chain for those independents with more than one branch this scheme cannot be much improved.

V.S. A most important distinction is that between "Large" and "National" multiple. Strictly speaking some organisations with less than a hundred branches might be termed national, for they have branches evenly related to the importance of shopping centres throughout Great Britain. On the other hand many large organisations have all their branches in a relatively limited region. However most organisations with a national distribution do have over a hundred branches and the term is used specifically for these.

Unit shops are the most important organisational group as they account for 70.5% of all establishments by number and 48.1% of all retail sales. This difference is ? a reflection of the very low turnovers of many of these shops, and of the low average turnover[12] of all shops in the group (£5,868). Unfortunately no dispersion of the size of these unit shops can be presented, which means that the sales figures of both department stores and parlour shops are included in the average figure.

Regional differences in the amount of money spent in these shops per head of the population are considerable, ranging from £52.7 in London to £39.0 in the North. Geographically the regions which have higher than average sales figures are very heterogeneous. They are London, the North-West, the West and Yorkshire. Their dissimularities can be estimated from the fact that in London

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12 i.e. $\dfrac{\text{Total Sales}}{\text{Total Number of Establishments}}$

unit shops take only 42.9% of all sales expenditure, whilst in the North-West and Yorkshire they take 51% and in the West 53%. This is further illustrated in that these shops in London have an average turnover of £8,794 which is over £2,000 greater than in any other region, whereas those of the North-West only have average turnovers of £5154. Other regions, which have nearer average sales per head, generally conform to a north-south pattern of small, frequent shops in the north and large, less numerous ones, in the south.

The size of unit shops in Scotland is remarkable for, despite an overall large size, they are actually smaller than in Yorkshire and the North. The distribution of these shops within Scotland is unknown so it is really impossible to give an adequate explanation of this feature. Since the difference is not great it can probably be accounted for by the general connection between of this type of shop, especially its "parlour-shop" variety, and older industrial terrace housing areas. This connection is clearly apparent in the general north-south differences, and in the case of Scotland is probably a reflection of the concentration of so many shops in the industrial Central Lowlands. It is symptomatic of this general rule, when the differential distribution of other types of organisation is allowed for, that the proportions of all establishments with an annual turnover of under

£1,000[13] range from 17.3% in Wales to 9.5% in the South (table 1B).

Table 1.B Percentage of All Establishments with Annual Turnover less than £1000 by Standard Regions

Wales	17.3%	North-West	14.4%	Scotland	10.0%
Midland	15.4%	North	13.6%	London	9.6%
North Midland	15.3%	East	13.2%	South-East	9.5%
Yorkshire	15.1%	South-West	12.9%	South	9.5%

Shops in small independent chains are the second most numerous group, accounting for 10.8% of all establishments. They are however only the third most significant group in terms of sales (12.1%) for large multiples rank after unit shops. Regional variations in sales per head are not great except that London has a total of £18 per head, twice that of Wales, and nearly £5 per head more than any other region. These shops take over £13 per head of the population in both the South and the South-East where they are fairly large, only London and the South-West having larger shops. They are fairly evenly distributed throughout the regions, being most frequent in the North-West, Yorkshire and the North-Midlands, and least frequent in the regions with low population densities, the West, Scotland and Wales. In general fairly large towns provide the most favourable environment for this type of organisation since

13 There are 66,516 establishments in this category all but 1,053 have working proprietors.

within them there are many possible shopping centres in which a new branch can be established (Table 1.1).

Medium Independent Chains have only a quarter as many shops as the smaller chains. These shops have a considerably higher average turnover, partly as a necessary result of higher organisation costs. Regional distribution is very similar to the smaller chains, the same environmental factors being important to this size of organisation. In fact the concentration of this type of shop in those regions with numbers of large towns is rather more marked. The frequency ranges from one to 2,808 people in the North Midlands to one to 4,179 in the South, with Wales, Scotland and the West having fewer than one to 5,100 people. They account for a particularly high proportion of all establishments in urban areas with a population between 50,000 and 100,000.

The total sales by Small Multiples are the same as the total of Medium Chains. Shops of these organisations are however larger and less numerous. Regional variations are more marked and of a rather different character. In London sales amount to £6.7 a head, while in Wales they are only £1.4. Other regions with higher than average sales (£4.3) are the South, the South-East, the North and Scotland. These variations are mainly the result of a larger size of branch shop rather than more numerous branches. This size of organisation appears to be particularly encouraged by areas in which the market is expanding, since it is clearly a real attempt at multiple organisation rather than the simple connection of a number of unit shops, as many of the independent chains. It also would appear to prosper in areas where there are a number of significant shopping centres closely connected, the particular urban networks of Northumberland and Durham, and the Central Lowlands of Scotland accounting for a large proportion of the shops found in their standard regions. This feature also is found in the town-size data (Table 1.1) for these organisations account for most establishments in London and those urban administrative areas with a population over 250,000.

Small Medium Multiples account for 3.2% of total sales and only 1.6% of all establishments, having turnovers twice the national average. They are therefore marginally more important than the least significant group, Large Medium Multiples, in their proportion of sales but not of establishments. Regional distinctions are great with only two regions having sales per head exceeding the national average of £3.2. These regions are London (£6.9) and the South (£3.9). A third region, the South-East, has sales of £3.1 per head. These high figures are the result of the relatively large numbers of these shops rather than, as in other groups, higher average turnovers. In fact shops in the East are larger than those in London, those in the North Midlands are larger than those in the South, and those in six other regions are larger than those in the South-East. In frequency shops of organisations of this type range from one to 3,803 people in London, one to 6,119 in the South and one to 6,153 in the South-East, to less than one to 11,000 in the North Midlands and the East. The North has the lowest sales per head (£1.4), for these shops are extremely rare in that region (one to 14,680 people), this low figure shows that the great importance of Small Multiples in the region is to some extent due to chance. The regions in which there are few shops of this type, the North Midlands, the West, the East and the North are, it should be noted, all without a really major conurbation[14].

Many of the Large Medium and Large Multiples are analysed in chapter five. The Census provides, however, an overall picture beyond the scope of an independent investigation. Large Medium organisations account for sales of £3 per head of the population. One region, London, has a sales figure (£5.6) higher than the national average, for in it these shops are both more frequent and larger than

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14 Tyneside is the smallest of Registrar General's Conurbations and is particularly dominated by its central shopping area, Newcastle.

elsewhere. In the East, the only region with larger shops than London, and the West, which also has large shops, sales per head are very low, for shops of this type are very infrequent. A similar, although not so pronounced, situation exists in the North Midlands. This pattern is broadly similar to that described for Small Medium organisations. It would seem that the share of a region's sales achieved by multiple organisations of medium size is very much a reflection of the urban network existing in that region. Where there are great contrasts in significance between shopping centres it may only be profitable for multiples to establish branches in the major shopping centres, for the profit on the size of turnover possible in the smaller centres is unlikely to be sufficient to meet organisational overheads. Predominantly rural areas have urban networks with such contrasts, with the County Town fulfilling functions which are met elsewhere only be the Central Shopping Districts of the provincial capitals. This may be demonstrated by the greater ease with which urban hierarchies have been distinguished in such areas as compared with the conurbations[1]. The large size of multiple branch shops in these regions is further evidence of such a structure. The low frequency of multiple branch shops is perhaps even more the result of the distance between shopping centres. The extension of an organisation at an early stage of growth is to some extent determined by the proximity of suitable shopping centres which are without one of its branches. If shopping centres are widely spaced it is probable that an organisation will prefer to intensify the sales of existing branches rather than to increase their number and the size of the trading area (as delimited by branches).

Regions which have high average sales per head through Large Medium Multiples may be divided into two types: first, there are those in which shops are larger but less frequent than average, which include the South-East, the Midlands and Scotland; second, there are those where the reverse applies, smaller and more frequent shops, which include Wales, the North-West, the North and Yorkshire. In Wales and the North-West these shops are particularly common, there being one to 4,700 people. The urban network in the older industrial areas contrasts completely with the hierarchy of the West and the East in the possibilities that it presents for the expansion of multiple organisations. In terms of evolution it is important to remember that many multiple organisations originated as a way of distributing the products of mass production to working class customers, found particularly in the industrial regions. Thus although in Great Britain 54% of all branches of medium sized organisations belong to Large

Medium organisations, 74% in North, 69% in Wales and 60% in the other northern regions of these branches are run by the Large Medium Multiples. The North and Wales, with their clearly defined coalfield urban networks, which are isolated from the main urban belt of England, are particularly illustrative of this. High population densities provide an adequate number of shopping centres within a limited region. The isolation of the two regions encourages smaller organisations to increase their number of branches, so that they meet more fully the demand of these clearly defined regional units. Organisations of Large Medium size may hesitate to acquire new branches in other areas and so considerably raise all costs. Most expansion at this stage is achieved only by the purchase of an existing group of shops in a new area.

Organisations with over a hundred branches are of considerable importance in retailing, not only because they account for 16.3% of sales, have branches which have an average turnover of £21,280 and form 5.6% of all retail establishments, but also because the central direction of such a large proportion of the total trade results in many features which distinguish these organisations from smaller ones, only some of which are important to an understanding of their location. Since many of these organisations have deliberately attempted to achieve a national coverage regional variations in the overall frequency are small. Variations in sales per head however are not so small with the size of these shops varying considerably. The distribution of Large Multiples conforms very closely to the general north-south contrast shown in many aspects of retailing. In Southern England sales per head are over £14.0; in Northern England and Scotland they are under £11.2; and in the South-West they amount to £12.7, in the Midlands £12.1 and in Wales £11.4. This southern concentration shows the great flexibility of multiple organisations of this size, and is a distinct contrast to co-operative societies despite the similarities of the market which both catered for in the nineteenth century.

There are great variations in the regional distribution of co-operative societies which will be fully analysed in chapter six. Northern England and Scotland have sales by Co-operatives amounting to over £13 per head. In Southern England sales are under £10.3, while in the Midlands they are £10.5 and Wales £9.1 per head. A similar regional contrast exists in the frequency of shops, but the size of co-operatives conforms less readily to any major regional groupings of this type.

The full significance of the various relationships suggested here between types of organisation and standard regions is difficult to appreciate for they are so complex, and can probably only be fully understood by the study of the decision making process of each type of organisation, something which forms the subject matter of Section Three. Within each region there are considerable variations between towns which are examined as far as possible in Section Two. Before making these more detailed studies chapter two shows how some of the regional variations which have been shown to exist in this chapter are far greater in individual business types and, within each, in different sizes of organisation.

Table I. RETAIL TRADES BY ORGANISATION TYPE AND REGION

SALES PER ESTABLISHMENT (£'000)

Type of Organisation by no. of branches.

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
All	9.2	7.9	7.8	9.5	13.2	9.8	10.3	9.1	8.5	7.3	7.2	10.3
1	5.9	5.6	5.4	6.6	8.8	6.7	7.0	6.5	5.6	5.2	4.9	5.6
2-4	9.3	7.9	7.4	9.9	15.3	11.8	12.4	13.0	9.1	7.2	9.6	9.1
5-9	16.2	10.8	9.4	11.9	18.3	17.4	18.6	15.6	17.8	13.1	13.0	17.8
10-24	24.0	14.2	16.7	23.2	20.3	17.2	22.0	17.9	20.2	16.3	14.3	20.2
25-49	20.5	20.4	25.9	30.7	26.2	19.8	24.0	20.9	21.0	17.4	21.0	21.1
50-99	15.1	15.1	18.3	23.1	22.8	17.3	16.4	22.0	19.9	13.3	12.7	19.9
100+	17.8	16.5	21.6	21.9	25.1	21.3	21.7	19.3	20.7	20.8	18.8	17.4
Co-op.	24.9	15.5	22.2	23.9	35.0	23.6	25.0	20.4	25.8	18.3	21.7	22.3

SALES HER HEAD OF POPULATION (£'s)

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
All	93.5	96.1	96.0	94.1	122.7	103.3	98.6	92.5	94.1	98.9	80.6	99.8
1	39.0	48.7	47.8	47.1	52.7	40.6	47.8	49.0	45.9	50.5	42.9	47.4
2-4	10.9	11.2	10.4	11.5	18.0	13.2	13.0	11.1	10.5	10.6	8.8	12.0
5-9	4.9	3.6	3.4	3.1	5.5	4.8	4.4	3.0	5.5	4.7	2.4	3.9
10-24	4.8	3.2	2.7	3.5	6.7	4.7	5.6	3.3	4.3	3.9	1.4	4.5
25-49	1.4	2.6	2.0	2.7	6.9	3.1	3.9	2.1	2.8	2.6	2.0	2.0
50-99	2.8	2.9	2.0	1.7	5.6	2.6	2.2	1.8	2.5	2.8	2.6	2.8
100+	10.7	10.3	11.2	14.3	19.9	15.9	14.1	12.7	12.1	10.3	11.4	8.7
Co-op.	19.1	13.7	16.3	10.3	7.5	7.2	7.6	9.5	10.5	13.3	9.1	20.0

POPULATION PER ESTABLISHMENT

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
All	98	82	82	101	107	94	104	99	90	76	89	102
1	150	116	113	143	168	130	148	132	122	102	115	148
2-4	858	704	713	861	852	895	952	1163	871	687	1082	1105
5-9	3359	3086	2808	3819	3357	3637	4179	5130	3222	2764	5494	5358
10-24	5065	4492	6288	6622	3015	3679	3920	5435	4652	4159	10560	4550
25-49	14680	7889	13210	11480	3803	6153	6119	10170	7487	6507	10470	6961
50-99	5416	5217	9523	13270	4160	6685	7360	12240	8089	4681	4795	6052
100+	1674	2034	1923	1538	1263	1340	1534	1519	1707	2014	1647	1969
Co-op.	1305	1137	1369	2325	4686	3266	3279	2158	2474	1375	2384	1115

TABLE 1.1. RETAIL TRADES BY TOWN-SIZE GROUPS AND ORGANISATION TYPE.

SALES PER HEAD OF POPULATION (£'s)

Town Size Groups (000)

Organisation type (No. of Branches)	G.B.	Greater London	>250	100-250	50-100	25-50	10-25	2.5-10	Rest
All	100.1	122.7	121.4	116.2	120.6	104.3	99.1	117.6	43.0
1	48.3	52.7	55.1	55.6	54.9	49.4	50.8	67.0	26.8
2-4	12.2	18.0	14.5	14.3	15.3	12.1	12.2	12.9	0.3
5-9	4.3	5.5	9.1	5.4	5.4	3.5	2.2	2.3	0.6
10-24	4.3	6.7	7.3	5.7	4.6	3.3	3.1	2.4	0.8
25-49	3.2	6.9	4.3	4.0	3.8	2.2	1.5	1.5	0.4
50-99	3.0	5.6	3.9	3.2	3.4	3.0	2.1	2.2	0.6
100	13.0	19.9	13.6	15.4	17.9	14.4	13.1	13.3	2.5
Co-op.	12.1	7.5	13.4	13.5	15.4	16.1	15.6	16.7	7.7

ESTABLISHMENTS: % IN EACH GROUP

All	70.9	64.1	71.8	72.5	68.1	69.5	70.2	71.3	81.4
1	10.9	12.6	10.5	11.0	12.9	11.9	10.8	10.7	6.7
2-4	2.6	3.2	2.8	2.7	3.5	2.8	2.4	2.1	1.9
5-9	2.1	3.6	2.8	2.2	2.1	1.7	1.5	1.2	0.9
10-24	1.4	2.9	1.5	1.4	1.4	1.9	0.8	0.7	0.5
25-49	1.6	2.6	1.8	1.3	1.6	1.6	1.3	1.2	0.7
50-99	5.7	8.5	5.0	5.0	5.9	5.8	6.4	6.6	2.6
100	5.0	2.3	4.3	4.3	4.9	6.1	6.7	6.5	6.4
Co-op.	100	100	100	100	100	100	100	100	100

CHAPTER TWO

BUSINESS TYPES

The varied nature of the retail trades is difficult to express through any scheme of classification, for any shop may trade in many different commodities, and therefore legitimately be classified under a variety of heads. Some form of business or trade classification is however an analytic necessity for the understanding,of patterns of regional and structural differences, of broad business types. While in some circumstances[1] a classification of shops as outlets for commodities is advantageous (e.g. a newsagent stocking tobacco could be recorded as two outlets), a study on broad lines must rely on classifications of shops as units. This is illustrated by the different approaches adopted by the Trial Census of Distribution[2] conducted in 1937 and the 1950 Census. The Board of Trade's Census classification is used as far as possible throughout this study (see Appendix B).

Broad Business Types must be considered from several different aspects of function. First there are categories of shopping activity, which will be divided here into con-

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1 F.A. Leeming, An Experimental Survey of Retail Shopping and Service Facilities in Part of North Leeds, Transactions and Papers, Institute of British Geographers, 1959, No. 26.

2 Trial Census of Distribution in Six Towns, British National Committee International Chamber of Commerce, 1937.

venience, frequent and infrequent types. Second there are business groups (referred to here also as types of business) which are Census classes of shops classified according to their major characteristics, of which there are ten major groups and a number of sub-groups. Third there are eight types of organisation (co-operative societies and seven capitalist organisations classified by their number of branch shops). Clearly each of these divisions may contain some elements which are not fully characteristic. An examination of each of the three major types will now be made to see to what extent this is true, and to examine what regional differences each displays.

Two broad categories of shopping are generally distinguished, but are described in various ways by different analysts. In general they are main street and neighbourhood shopping, or convenience and shopping goods shopping. Jefferys[3] uses the terms "convenience shopping" and "main street shopping", Hall[4] terms the former "flowgoods shopping" since all shopkeepers choose a convenient site, this type of shopping tends to follow the consumer, if necessary, to her home, and shopping goods shopping attracts her to central shopping areas. In economic terms Holton's

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3 Jefferys (1954) P. 51.

4 Hall et al (1961) P. 4.

definition[5] is perhaps the most satisfactory, convenience shopping being for "those goods for which the price and quality differences among alternative sellers are small in absolute terms relative to the consumer's appraisal of the searching costs", while shopping goods are those in which differences in absolute terms are large. While this is generally satisfactory, geographically it perhaps does not give enough emphasis to a most important difference, that of frequency of demand, although "the consumer's appraisal of the searching costs" will be influenced by it. The general result of this distinction in shopping is that those shops which predominantly sell commodities classified as convenience goods must be found near to the consumer, and so will be more frequent and perhaps smaller than other types. Regionally it is likely that these shops will vary less than other types, as in addition to smaller elasticities of demand for their stocks, they need not reflect variations in the structure of the urban hierarchy. Structurally the pattern is less simple for although independents may prosper in neighbourhood shopping centres, with a pricing policy[6] adjusted to the type

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5 R.H. Holton, "Price Discrimination at Retail: The Supermarket Case", Journal of Industrial Economics, VI (October, 1957), P. 18.

6 W.G. McClelland, "Pricing for Profit in Retailing", Journal of Industrial Economics, VII (July 1959), P. 174.

of demand found there, there are particular economies, available to multiple organisations dealing in the relatively standardized goods of convenience trading, which enable such organisations to under-sell the independents if they can achieve a sufficiently high turnover. In contrast in many of the shopping goods trades the development of multiples has been hindered by the wide variety of commodities which are included in these trades.

Although it is thus possible to consider demand in two categories, it is impossible to classify all groups of shops into one or the other. Holton[7] added a rider to his definition, that a convenience good for one income group is a shopping good for a lower income group. This shows that it is unreal to expect groups of shops to fall into such a division. The characteristics of the shops of the major types are set out in table 2.A below:

Table 2A Census Groups of Shop

Group	Average Turnover (£'s)	Population Per Establishment
Grocery	9,057	297
Other Food	7,236	387
Confectioners	6,863	739
Clothing	10,520	671
Hardware	7,224	1,622
Chemists	9,477	2,929
Furniture	16,100	3,047
Jewellery	5,723	3,515
Booksellers	5,697	5,142
General	283,000	29,430

7 Holton op. cit.

The first three of these groups are obviously enough fulfilling everday demands and could quite easily be considered as convenience shops. Clothing is something of a special case for as a group it is given fourteen subdivisions in the Census, an indication that it deserves separate attention[8]. Equally chemists and hardware groups are differentiated from "shopping goods" shops, as much of their sales is made up by convenience goods, but are different from the first three groups as their frequency indicates central locations. The remaining groups are more clearly distinguishable as "shopping goods" groups. A more realistic division would therefore be into three categories, which might be labelled: convenience, frequent and infrequent shopping. This would also correspond with daily, weekly and irregular shopping trips, as distinguished by Brennan[9], which are perhaps more justifiable divisions of shopping activity. This is a division also comparable to that adopted by Evely[10] in a study of company finance.

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8 It is therefore rather unfortunate that it was chosen by Hall et al (1961) as a 'typical' shopping goods trade.

9 J. Glaisyer, T. Brennan, W. Ritchie and P. Sargant Florence, County Town, a civic survey for the planning of Worcester (1946) P. 206.

10 R. Evely, "Retail Distribution", PP 234-253 of Studies in Company Finance, edited by B. Tew and R.F. Henderson, N.I.E. S.R. 1961.

None of these three categories of shopping is homogeneous as three types of variations exist within each. First, within the major business groups there are sub-groups which belong to a different form of shopping to that which the major group has been allocated. The overall homogeneity of a Census group can be analysed from commodity data provided in the Census. Unfortunately this is only on a national level. If a region is found with a low per capita sales in any trade group this may be the result of a low consumption rate, low prices, or a low proportion of the sales of a trade's main commodity being retailed by shops of that trade. The low sales of the grocery group in London, for instance, may be the result of all these factors: a low consumption rate - more meals being eaten away from the home, severe competition within the trade keeping prices low, and a higher proportion of groceries being sold in other food trades. Second, within sub-groups there are organisation types which have a very different character to the others in that trade. Hall[11] has stated that: "The chains with a well-known name appear to be more like "shopping" shops and the independents to be "convenience shops" - even within a given trade."

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11 <u>Hall et al (1962)</u> P.4.

Third, even within organisation types there are some individual organisations which have very different location characteristics to the others of that size. This may be even extended, especially in the case of combines, to within the organisation itself. The importance of these variants is considerable to a geographical study of the retail trades, for they not only emphasise the conditions which determine the "normal" pattern by their "abnormality", but in many cases have marked concentrations in location.

In the business types classified as convenience shopping some sub-groups are distinguishable because their shops are substantially larger than the average, which suggests that they find more central locations than typical convenience shops. These are dairies which have an average turnover of £21,210, tobacconists (£11,670), grocers with meat (£13,410) and grocers with wines and spirits (£12,623). The dairies are more depots than shops, although some shops trading under the name of "dairy" would be more properly classified under the grocery heading. The tobacconists classified under this heading are specialist outlets found only in central locations, the sweetshop-tobacconist-newsagent general store type of shop is not included in the group. The grocery sub-groups are also specialist shops found mainly in High-street locations or at least significant secondary centres.

Wider variations exist in the groups which fulfil frequent demands. In the hardware group electricity showrooms (£14,420), gas showrooms (£16,982), radio dealers (£10,020) may be distinguished by their size from the group as a whole (£7,224). In the clothing trade an even wider range exists as can be seen in Table 2.B

Table 2B Average Turnover of Establishments in the Clothing Trades by Sub-Groups

Women's Outfitters	£19,730	Women's Outwear	£5,973
Women's Outwear	£14,600	Infants	£3,887
Menswear	£13,120	Wool	£3,512
Furriers	£12,930	Milliners	£3,156
Men's and Women's Wear	£11,010	Drapers	£2,866
Boots and Shoes	£10,640	Second-hand	£ 702
		Corsetieres	£ 522

The two groups, into which the various sub-divisions of the trade can be classified on the basis of their average size of establishment, show that there are very different conditions in the trade. The one which has a larger than average size shops is clearly meeting "shopping goods" demand with shops centrally located. The groups with smaller than average shops are clearly only comparable with convenience shops.

Shops in the groups classified under the infrequent heading are more homogeneous, and although it would be possible to sub-divide the general group, all sub-groups in the four trades are of the general character of the type as a whole.

In general the larger the organisation, the larger is its average size of shop (see figure 2A). This relationship is not a constant one and some sizes of organisation may be distinguished, since they have shops which are either considerably larger or smaller than the next size of organisation. In the retail trades as a whole chapter one has shown that there is a range in size of shop, by organisation, from £6,275 to £21,280. This range may most conveniently be expressed as an index number with 100 equalling the size of the smallest shops in a trade. The index number of the largest shops in the retail trades is therefore 348. The level of this index varies greatly from trade to trade, trade types varying considerably in their homogeneity, with the actual range being from 180 in the bakery trade to 1282 in the drapery trade. As figure 2A shows, the smallest shops in a trade are not necessarily run by unit shops, and the largest shops are only run by large multiples in one third of the trades for which a complete organisational breakdown is available[12]. The trades in which the greatest variations exist are particularly specialist shopping goods trades, whereas those with low indices are mainly convenience trades:-

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12 Co-operative societies are not discussed in this chapter for they receive specific attention in chapter six. They are shown in figure 2A for the sake of completeness.

Drapery	1282	Bakers	180
Women's underwear	1101	Off licences	189
Dairymen	755	Butchers	200
Women's wear	620	Chocolate and Sugar Confectioners with tobacco	203
Furnishers	593		
Cooked Meat	518		
Jewellers	467		

The convenience trades with high indices are special cases: dairymen have already been examined; cooked meat suppliers have a high index as the result of the large size of the shops of small medium organisations. There are distinct differences in the organisational pattern of the other types of shop with high indices. In the jewellery trade multiples are very different to other organisations, having far higher sales and lower repair receipts (profit margins being greater on the latter). Women's outwear shops include, in their small multiple group, certain organisations with very large shops (it may be for instance that C. and A. Modes Ltd. is classified in this trade). A similar, but more marked, contrast exists in the drapery trade. Women's underwear shops include two particularly active multiple organisations in the large medium multiple category which, in consequence, has a large average size of shop. Some of these variations are shown in greater detail in Table 2C. They indicate great variations in the homogeneity of trades. Different types of organisation clearly cater for different types of demand in some trades and are found in different types of location, in view of these variations in their size of shops. The types of organisation which have very different sizes of shop are shown in the table as "special organisations", while for comparison the organisation type with the most similar shops is also shown.

The small size of unit grocers with off-licences is a reflection of the large number of neighbourhood shops in that group as compared with larger organisations, when the off-licence becomes something of an expression of the "quality" grocer. Dairymen are distinguished first because of the inaccuracy of the classification which has already been examined, something which most clearly affects the unit shops. A further difference can be distinguished between chains with between five and twenty-four branches and other organisations. Whilst chains of this size may all be composed of depots rather than shops, larger chains include both. In the clothing trades, distinguished in table 2C, the contrasts reflect either differences in the type of demand catered for by organisational groups as a whole or the presence of particular organisations in an individual size group. The contrast between drapers run by multiple organisations and other types of organisation is clear, this being a particular example of a trade in which independents are convenience orientated, and multiples are "shopping goods" orientated. In the chemists group the contrast is a reflection of the difference between the two large multiple organisations, Boots and Timothy Whites, and other traders. This sort of contrast

Table 2C The size of shops in some selected organisation types

Trade Group	"Special organisation type"[1] Type[2]	S/E[3]	Rank[4]	Organisation size with most similar size of shops Type	S/E	Rank
Grocers with off-licence	1	£8,831	7	2-4	£23,810	6
Dairymen	1	£7,977	7	50-99	£29,450	6
	5-24	£56,590	1+2	2-4	£36,580	3
Women's Outwear	10-24	£90,580	1	50-99	£27,063	2
Women's Underwear	50-90	£46,130	1	100+	£15,600	2
Men's and Women's Wear	10-49	£25,500	1+2	5-9	£12,360	3
Drapers	50+	£34,093	1	10-24	£ 6,055	2
Furriers	5-9	£21,680	2	2-4	£13,468	3
Chemists	25+	£22,750	1	5-9	£10,530	2
Jewellers	100+	£24,010	1	50-99	£16,610	2
Furniture	10+	£43,680	1,2+3	5-9	£19,050	4

1. A size of organisation which is differentiated by its size of shops
2. Types of organisation by their number of branches
3. S/E indicates sales per establishment
4. Rank by size of shops (7 = smallest, 1 = largest)

also exists in the jewellery trade. In the furniture trade there is a distinct contrast between multiple organisations and independent organisations, something which does not exist in the majority of cases (see figure 2A). Indeed the figure suggests that in many ways the most significant break is between small independent chains and medium independent chains.

Overall there are only four groups in which the size of shop increases with each succeeding size of organisation. Some of the most significant displacements of this order are in those trades where the largest multiples do not have the largest size of shops. This is characteristic of all the other food groups, except fishmongers and greengrocers for in these trades costs of organisation are probably higher than elsewhere and it is necessary to maximise total turnover rather than the turnover of individual shops. In all these trades there are few medium sized organisations for this very reason. In the confectioners and booksellers trade a similar situation exists for there are many branches of large multiple organisations which are kiosks rather than shops.

The method adopted by the Board of Trade in classifying chains of shops into separate organisations has been described on page 4. There is no way in which it is possible to ascertain the group into which a particular multiple organisation has been classified. There are clearly shortcomings in any scheme of classification, and even with the most precise interpretation of the rules of classification, different sorts of shops in the same organisation will be classified in the same trade group, for in many cases it will have been impossible to distinguish these statistically. Furthermore the size of branch shops in an organisation will vary considerably. Little data to illustrate this are available but one bespoke tailoring organisation has made available the following figures for its branches in 1961.

Table 2D The Size of Branches of a Large Multiple Menswear Organisation, 1961.

Sales per Establishment (£'000's)	% of Branches
under 25	54
25 - 50	38
50 - 75	5
75 - 100	2
over 100	1

Other prominent organisations with marked variations are Boots Cash Chemists Ltd. which makes a clear distinction between its "big shops" and its ordinary branches; Timothy Whites and Taylors Ltd. with similar differences; and W.H. Smith Ltd. which operates establishments ranging from bookstalls to minor department stores. If subsidiary companies are considered the variations are even greater for the large combines like Great Universal Stores, United Drapery Stores and Associated British Foods appear to pay only little regard to trade divisions when they expand their activities.

The significance of each type of organisation varies considerably from trade to trade. The large organisations are most significant in trades which meet frequent rather than everyday demands, in the clothing and chemists trades, which deal in relatively standardized goods. They are also significant in those convenience trades where central location could be of advantage, especially in the confectionery trade. They are however also important in the dairy, grocery, fish and butchery trades. In the more specialist trades they are not so important, for they find it difficult to find any economies in purchasing commodities, since the range of stocks which these trades have to carry is so great. Some of these variations are examined in detail in chapter five.

REGIONAL VARIATIONS

(1) BUSINESS TYPES

Two kinds of regional variation in business types may be examined here. There are variations in the distribution of trade types and of organisational types. The most marked of these are organisational variations, but both exist.

The regional variability of trade types may be expressed by two indices of variability for the sales per head, the size of shop and the population per establishment of each business type (see figure 2A). These are:-

a) Co-efficient of Variability (V) $= \dfrac{\text{Standard deviation}}{\text{Arithmetic mean}}$ %

b) Measure of Variability (MV) $= \dfrac{\text{mean deviation}}{\text{median}}$ %

Statistical theory would suggest that values for the first would be greater than the second when one or two extreme values are the major variable elements of a distribution, while MV will be higher than V when variability is more evenly distributed.

The total variability of sales per head ranges from 6.9% to 56.8% for V, or from 4.1% to 47.5% for MV. Trades fall into two groups, sixteen having values of V ranging from 6.9% to 19.9%, and thirteen having values between 32.5% and 47.7%. Four trades are not found in these groupings. Furriers are strongly orientated to metropolitan areas and have a value of V of 56.8%. Hardware, electrical goods and infants wear are found mid-way between the two groups. The trades which have large regional variations are mainly smaller than those with small variations, this, for classification reasons, is not unexpected, the effect of random variations being far greater in these small groups. The most interesting

cases of variability are those which depart from this rule: the trades which have large numbers of shops and high variability; and those which have few shops and low variability. Trades which conform to the first of these patterns are dairymen, men's and women's wear, and grocers with bakery. The large free supplies of milk[13], which are taken by consumers in rural areas account for the variability of dairymen. Sales of men's and women's wear shops are a reflection of north-south differences in this type of trade. The regional variations of the grocers with bakery trade are a reflection of north-south differences in the marketing of bread. In the south the bakers round is well established[14] and so there is less necessity for shops, other than specialist bakers, to stock bread; in the north convenience demands a far wider range of outlets in view of the fewer bakers' rounds.
The trades which have few shops but low variability (V) are off licences, wool and book shops. These in fact had rather higher values of MV:-

	V	MV
Off licence	15.9%	40.0%
Wool	10.5%	27.6%
Bakers	10.6%	30.0%

13 National Food Survey 1958, Ministry of Agriculture and Fisheries, H.M.S.O, 1958.

14 Jefferys (1954) P.218.

This difference is the result of an overall variability rather than extreme variations in certain regions.

There are rather smaller regional variations in the size of shops, for shops require a minimum turnover before they can be profitable and this is roughly equal throughout the country for any one trade. The major deviant groups are the dairymen, grocers with meat, grocers with off licence and infants wear shops. Trades which have particularly low regional variations are menswear and chemists. This shows that the general variations which exist in the dairy trade have a regional component. The specialist grocers are small corner shops in Northern England and large main street shops in Southern England. The menswear and chemists trades both have a large number of multiple organisations with a full national coverage.

The variability of the regional frequency of shops is very high. Values of V range from 9 to 85.5% and of MV from 8 to 68.4%, both have dispersions which are positively skewed. Such variation makes it clear that to rely on estimates of the frequency of shops when making planning provision for new shops has little objective basis. Six types of shop are more variable than the others. They are grocers with off licence, off licences, cooked meat, bakers, wool, and men's and women's wear. Different social backgrounds account for the variations which exist in these trades.

These regional variations in trade type may be profitably examined in greater detail. The overall regional variations are described in chapter one. It is worth noting here those variations which depart considerably from the overall pattern of the retail trades.

In the grocery trade London ranks twelfth in terms of per capita sales instead of first; the North (3) and the North Midlands (1) are other major variations.[15] The problem is whether these differences are accurate representations of variations in expenditure on groceries, and if so whether this is the result of price differences or consumption habits. Evidence from the National Food Survey suggests that prices are to some extent lower in London and higher in the two northern regions. Consumption is however probably lower in London for more food is purchased there which is sold by other food retailers, it may be however that there is more cross-trading in London than in other areas. Sub-groups in the grocery trade are not very divergent from the average. There is however a tendency for the more rural regions, East, West and Wales, to have higher than average sales per head.

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15 In this account numbers in brackets after a region refer to its rank.

Other food trades vary far less than the grocery trade. Dairies sell noticeably less, as do bakers and fishmongers, in the North West (9), Scotland (7) and Yorkshire (11). This might be expected for the closer network of shops and a poor development of delivery rounds results in a far wider type of outlet distributing these special commodities. The low sales of fishmongers in Northern England is also a reflection of the large numbers of fried fish shops found there. There is little regional variation in the sales of fish through these two types of outlet. Conurbations have the highest sales per head of greengrocers shops. This may be a reflection of high prices or fewer free supplies. The regions with the highest figures are London, the Midlands, the North-West, Yorkshire and the North.

The sales of the clothing trade are rather more evenly distributed throughout the country. London, as the centre of fashion, has the highest sales per head in all sub-groups except men's and women's wear. This trade is most developed in Scotland, the North, Wales, the Midlands, Yorkshire and the North-West, and least developed in London. Different social backgrounds account for these variations, which are also expressions of the importance of co-operative shops in these regions, for co-operatives very largely combine their sales of men's wear and women's wear in outlets of this type. The South-East (8=) has a particularly low rank in the boot and shoe trade, and it must be suspected that it loses trade to London. Furriers are specially important in major cities, the regional sales pattern reflects this, for Scotland, the Midlands, Yorkshire and the North-West rank after London in sales per head.

Other types of shop have some specially significant differences in sales per head. Domestic hardware shops sell more in rural areas than in the conurbations. The West (1), the East (2=), the South (2=) and Wales (4), all rank far higher in this trade than in others. Booksellers are far more significant in Southern England than in Northern England. Furniture shops are poorly represented in the South (11), but have high sales in the North Midlands (3) and Yorkshire (2), reflecting the dominance of large London stores over the south, and emphasising the contrasts between the North and South in the sales of furniture by other types of outlet, particularly department stores.

The regional variations which exist in the size of shops and their frequency are broadly similar to these variations in sales per head. In the North and Scotland food shops are relatively smaller than shops in general; in Yorkshire, North Midlands, North West and Wales there are few deviations from the average size of shop. Food shops are relatively smaller than shops in general in the

East and London, but are larger than average in the South-East, the South, the West and Midlands. Clothing shops are considerably smaller in relation to others in the South-East, the South and the Midlands.

The frequency of particular types of shop shows that there are particular concentrations of each type in certain regions. Since however the turnover of shops is their most important element it is not surprising that in some trades variations are almost random.

The patterns briefly summarised above are only now becoming clearly apparent and they present a wide field for further study, which will soon have the advantages of comparison of two periods of time when the 1961 Census of Distribution is published.

(2) ORGANISATIONS

Regional variations, which are more definitive and more readily explicable than those found in business types, can be observed in the distribution and significance of different types of organisation. These are in fact one of the major elements of the geography of retailing in Great Britain and are the subject matter of section three of this thesis. The Census enables the broad outlines of these variations to be examined. It has been shown above that different trades have very different organisational structures. It is necessary to examine regional variations in each trade in order to obtain an adequate picture of the elements which make up the overall variations described in chapter one.

Multiple organisations account for 20.8% of the sales of the grocery trade, and of this large multiples take two-thirds. Regionally the proportion of sales ranges from 37.4% in London to 13.8% in the North Midlands. Other regions in which multiples account for less than one-fifth of sales are Yorkshire, the North-West, Scotland and Wales. The regional pattern conforms quite closely to the north-south differences demonstrated elsewhere. The only northern region not included in the list is the North itself, where multiples account for 22.2% of sales. This region, or rather the Northumberland and Durham coal-field part of it, would seem to have been a particularly fertile area for multiple companies in grocery (see chapter five).

The relative significance of various types of organisation ranges considerably. Medium sized multiple organisations account for 5.8% of sales in the country as a whole. They take 12.2% of sales in London but only 2.2% in the East. Generally they are poorly represented in regions which have a dispersed urban network, like the East and the West, and Wales and the North Midlands (apart from their coalfield areas). Large Multiples on the other hand because of the higher concentration of shopping in significant centres, like the County Towns, are well represented in regions with dispersed urban networks. The regions in which they account for less than 10% of sales are Yorkshire, the North-West and North Midlands, all regions in which their major competitors, co-operative societies, are particularly strongly developed. Scotland, as well as the North, has important co-operative societies, but conditions have proved particularly attractive to large multiples in both these regions. The proportion of trade accounted for by independent traders varies greatly. In London, Scotland and the North they account for less than 48% of trade. In other regions they take over 55% of sales. This contrast emphasises the importance of large scale organisations in the first three regions.

Multiples in the dairy trade are very unevenly dis - tributed:-

	L[16]	SE	S	SW	NW	Scot.	Others
% Branches	73.3	5.6	3.6	2.1	3.2	10.4	1.8
% Sales	63.2	6.1	5.2	2.5	2.4	4.1	16.5
% Population	17.2	5.2	5.4	6.1	13.2	10.5	42.4

This is the result of very special conditions, it does not reflect the distribution of co-operative dairies, another important element in the distribution of milk. In 1950

16 The abbreviations for regions used in tables are listed in Appendix A.

four companies control nine-tenths of the total number of branch shops. They are almost all fully integrated, including collecting, processing and retailing in their activities. Their headquarters are found either in London or Central Scotland. This distribution is the result of the economies which are available, only to integrated organisations, in supplying customers in conurbations far from the production areas.[17] In conurbations other than London, Glasgow and Edinburgh milk is distributed either by wholesalers who sell to independents, which would seem to be a particularly transient feature of the trade, judging from the expansion of the large integrated organisations, or by co-operative dairies, which are probably particularly important in some of the conurbations, and especially those with only one society trading in that conurbation, like Nottingham and Leicester.

Butchers shops of organisations with over twenty-five branches are mainly (87.3%) run by two companies. This structural element results in a distinct contrast in the regional importance of small and large organisations. Small multiple organisations are found particularly in London, while the larger multiples attempt to achieve a greater national coverage. Small multiples are fostered

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17 <u>Jefferys (1954) op. cit. P.239</u>.

particularly by a close urban network, which provides a large number of possible sites in a limited area. The London and Midland (Birmingham) regions are therefore particularly important. The larger organisations account for 19.9% of sales in the South-East but only 8.1% in the North-West. In three regions, the North, Wales and Scotland they probably account for even smaller proportions of trade than in the North-West. Jefferys[18] suggests that this poor representation in the older industrial regions is a reflection of the evolution of the large companies, which originally were started to market frozen imported meat, a commodity which was not welcomed at first in these more traditional regions.

Multiple fishmongers, dominated by one large organisation, are found particularly in London (see P. 228). This is a result partly of a higher consumption rate of top quality fish in that region, and partly of the particular assessment of conditions by the dominent organisation of the trade, MacFisheries Ltd.

In the greengrocery trade, which is also a trade with few multiple shops, multiple organisations are concentrated in three regions:-

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18 Jefferys (1954) op. cit. P. 190.

	London	North-West	Scotland	Others
% Branches	30.8	36.4	8.6	20.2
% Sales	33.9	30.2	10.5	25.4
% Fruit Imports (1950)	32.0	18.8	4.0	45.2
% Population	17.2	13.2	10.5	59.1

This distribution is partly a reflection of urban networks, but is even more a result of the presence in each of these regions of a major port through which fruit is imported.[19] Multiples based on these ports can by-pass one of the stages of distribution, by collecting supplies straight from the docks or the major wholesale markets found in the ports.[20]

Multiple bakers are also concentrated on the major conurbations, something which is characteristic of all the convenience trades. Organisations with over twenty-five branches have 85% of their sales and 75% of their branches in four regions, which have the major conurbations located within them - London, the North West, Scotland and the Midlands (47% of the population). Small multiples can locate all their branches in smaller urban areas, but they too are concentrated in these four regions (over 60% of both branches and sales). Distribution costs

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19 Jeffenys (1954) op. cit. P. 244.

20 G.R. Allen, Agricultural Marketing Policies, chapter 8, Oxford 1959.

are extremely important in this trade for the bulk-value ratio of this commodity is high, and so other things being equal, the larger a market found in a small area, the more profitable is the organisation. The proportion of multiples found in the four major regions is shown below:-

	Organisations				Population
	10-24 Branches		over 25 Branches		
	% sales	% branches	% sales	% branches	%
L	34.6	23.9	33.7	23.6	17.2
NW	5.6	10.9	23.5	21.1	13.2
Scot.	14.9	19.9	17.8	18.2	10.5
M	8.2	6.5	9.9	11.5	9.0
Others	36.7	38.8	15.1	26.6	50.1

The particular importance of large organisations in the North-West is the reflection of the origin there of a number of companies specially important in the trade.

Multiple organisations trading in the off-licence trade are concentrated either in regions with major conurbations or the regions of southern England:-

	L	M	SE	NW	S	Others
% Branches	37.1	22.3	10.0	11.4	7.8	12.4
% Sales	40.3	13.8	13.0	8.7	9.5	14.7
% Population	17.2	9.0	5.2	13.2	5.4	50.0

The trade is clearly influenced by the economies associated with close urban networks, and the particular social pattern and income level of southern England.

In the confectionery trades multiples are even more unevenly distributed:-

	London		Scotland	
Organisations	% sales	% shops	% sales	% shops
10-24 Establ.	43.3	40.7	13.5	13.8
25-49 "	52.0	42.7	7.5	12.0
50-99 "	81.1	65.4		
100+ "	45.3	33.0	9.9	18.9

The special dominance of London is the result of the possibilities for expansion, which sites on railway and underground stations provide, in that region. Contracts for these sites are usually negotiated centrally, which is a great advantage to a multiple organisation. The growth of particular organisations, encouraged by high densities of people in both London and in Central Scotland is a further extremely important factor in this distribution. Within the confectionery trades regional variations exist which must be related to individual organisations. 46.9% of all "chocolate and sugar confectioners" are found in Scotland, compared with only 15% in London. Whereas "chocolate and sugar confectioners with newsagents" have 46.4% of their sales and 33.9% of their shops in London and only 4.2% of sales and 7.2% of shops in Scotland. Tobacconists in contrast conform closely to the general pattern. (Table 2.D).

Multiple chamists are more evenly distributed than any of the groups described above for the two large organisations, Boots and Timothy Whites, have a national distribution, and account for four fifths of all multiple establishments. Unfortunately statistical data are only

Table 2D Confectionery Trades:

% of Multiples in Certain Standard regions

Organisation	London		Scotland		North West		Midland		Others	
	% Sales	% Branches	% Sales	% Branches	% Sales	% Branches	% Sales	% Branches	% Sales	% Branches
10 - 24	33.5	39.0	17.7	15.6	13.7	15.4	6.4	5.6	18.7	24.4
25 and over	59.9	60.7	4.2	2.9	5.9	7.4	7.1	4.4	22.9	24.6
Population %	17.2		10.5		13.2		9.0		50.1	

available in a gross form for organisations with over five branches, and so the location of small multiples cannot be analysed. The greatest regional concentrations are in London, the Midlands and the West, which are the regions in which the two major organisations had their origins, and in which some of the most important other organisations are found.

Multiple organisations in the boots and shoe trade are very evenly distributed. The only exceptions to this are the great importance of medium sized multiples in the south, and the low proportion of sales accounted for by large multiples in Scotland. A similar uniformity can be observed in the mens's wear trade. In both these trades there are numerous organisations which achieve national status, and so regional differences might be expected to be small.

In the other clothing trades regional differences are more marked. In the Men's and women's wear trade multiple organisations are most important in Northern England and London:-

	Organisations				Population
Multiples	10-25 Establ.		over 25 Establ.		
	% sales	% shops	% sales	% shops	%
Scot.	24.0	7.0	16.5	22.2	10.5
M	19.1	17.7	6.2	6.1	9.0
NW	8.4	14.1	10.0	12.5	13.2
Y	8.7	10.0	8.9	6.8	8.4
L	10.6	12.7	17.9	13.2	17.2
Others	21.2	38.5	40.5	39.2	31.7

It has already been seen (P. 57) that these regions have high per capita sales by shops of this trade.

The drapers trade is similarly distributed, except that multiples are particularly important in London:-

	L	NW	Y	M	Scot.	Others
% Branches	4.4	23.9	15.1	10.7	2.6	43.3
% Sales	25.9	25.1	5.5	8.9	8.0	26.6
% Population	17.2	13.2	8.4	9.0	10.5	41.7

There are however considerable size differences, so in London they account for only 4.4% of the multiple shops in the trade, while taking 25.9% of their sales.

Multiple traders, in other trades selling women's clothing, have some considerable regional variations (table 2E). In general, Southern England is more important in these trades than in the trades described above. The preference of upper class customers for the individual service provided by independent traders is reflected in a north-south contrast in the importance of multiple traders. The most outstanding other features of the variations are the concentration of specialist women's underwear shops in London, the large number (but not size) of women's wear shops in Yorkshire, the importance of small multiples in women's outfitting in Scotland and the rather high numbers of these shops in the South, the South-West and the South-East.

Table 2E Women's Clothing Trades

percentage of Multiples in certain standard regions

	L	NW	Scot	M	Y	NM	SE	S	SW
Women's Wear % sales	25.6	20.4	11.1	9.8	8.5	8.1			
% shops	11.7	9.3	4.6	13.3	19.3	9.6			
Women's Underwear									
% sales	41.5	8.9		10.9	8.1				
% shops	32.8	14.1		7.9	14.8				
Women's Outfitters									
10-24 branches % sales			22.2				8.9	14.5	10.7
% shops			31.2				4.2	6.3	7.8
over 25 branches % sales	21.8	12.3							
% shops	23.0	10.9							
Population %	17.2	13.2	10.5	9.0	8.4	6.9	5.2	5.4	6.1

Multiples trading in radio and electrical goods are really only important in the southern half of Great Britain:-

	L	M	S	SW	Others
% sales	47.9	7.4	6.7	6.4	31.6
% shops	42.5	8.5	8.1	9.0	31.9
% population	17.2	9.0	5.4	6.1	62.3

This is probably the result of the existence of a greater market for these goods in this area, and the location of most manufacturers of these goods, and of hire purchase finance houses in the London area.

Multiple organisations in the jewellery, leather and sports goods trade are also mainly found in the southern regions. Probably at least 160 of the 486 shops, classified in the trade as multiples, are found in London.

In contrast to these trades multiple furnishers are concentrated mainly in Northern England. No data are available for the East, or for small multiples in the South and South East, but it is clear that this regional difference applies to all sizes of organisation:-

	N	Y	NM	L	M	NW	Wales	Scot	Others
% sales	7.4	11.0	7.5	18.6	10.2	18.2	6.8	10.9	9.4
% shops	7.6	11.3	7.4	16.5	8.2	18.6	8.6	8.0	14.4
% population	6.4	8.4	6.9	17.2	9.0	13.2	5.3	10.5	23.1

The regional variations which have been demonstrated in this chapter make it clear that there are broad regional differences which are of the greatest importance to a geography of the retail trades. These variations exemplify general variations in the geography of Great Britain, particularly the north-south division which is generally very important in social geography. The environmental determinants of the distribution of business, trade and organisational types, which have been suggested in this chapter, are examined in more detail in the succeeding parts of this thesis. All studies of retailing should be constantly aware of their existence and of the regional variations which result from them. Two major considerations appear from this study of the regional pattern of retailing. The first, is the importance of the network of shopping centres in a particular area, and the second, is the distribution of particular organisation types. Section two of this thesis considers the network of shopping centres; and section three the incidence of organisations.

SECTION TWO

THE URBAN PATTERN

"A central place of any given order is a source of capital goods and services of all types available in any of the lower-order central places within the system of which it is a centre. ... It is a source of central goods, the market ranges of which cover those centres and areas included within this system."

R. Vining: "The Delimitation of Economic Areas: Statistical conceptions in the study of the spatial structure of an economic system." Journal of American Statistical Association, Vol. 48, 1953, p.57.

INTRODUCTION

THE CHARACTERISTICS OF RETAILING IN TOWNS

The regional characteristics of retailing discussed in section one are the result of many separate factors. Overall these may be classified into two major types, which are however interconnected. Regional variations are due to differences in social character, and to the distribution of different types of shopping centre. Social differences are not a major subject of study in this thesis, but they do of course have profound affects on the distribution of shops. Urban differences, to which shopping centres are closely related, are however at the core of this thesis, for they are variations to which the geographer is particularly sensitive. It is the aim of this section to show how these influence the distribution of retail elements of the trades, so that a full study of the trades may be able to place them in their true perspective, alongside the social differences.

The distribution of shopping centres in any region is broadly the result of the age of settlement, the type of economy, the social structure and the physical geography of that region. This distribution is most important to a true understanding of the retail trades for in those areas where shopping centres are widely separated, shopping can really only be a weekly activity for most of the population. In these areas, many shops are therefore not meeting convenience demands, in the sense that this term is used in the discussion of conurbations. A somewhat similar situation may exist in those areas, including some of the conurbations, where personal mobility[1] is great. Shops in these areas are both larger, and less frequent, than shops in areas where shopping centres are found close together, and where mobility is low. To the economist, the problem which emerges is whether this means that retailing is more productive, given that there are economies of scale (see P.102), or whether the very factors which have led to the large size of shops, cause the retailer to have higher costs, such as costs of delivery, advertising and site costs, in the relatively few shopping centres which attract customers. Chapter two has shown that each trade differs considerably in its characteristics, and for a true picture of the interaction of demand and the character of shopping centres, each should be examined here. Unfortunately the data that are available makes this possible only for towns with populations over 25,000 (Chapter four). The importance of the size of shops

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1 Personal mobility should be taken to include not only fairly obvious facts like transport nets, car ownership and work-place induced movements, but also indirect factors like the household ties of the housewife (such as the number and age of children), the extent and force of retailers' advertising, and the attitute of housewives to shopping.

is such that this is considered in greater detail than other characteristics of retailing.

Berry[2] has shown that studies of central place systems may be of two types: aggregate analyses and elemental investigations. The former "abstracting from spatial arrangements, will almost inevitably emphasize the importance of continuous functional relationship. Elemental investigations, in which the spatial parameter is explicit, will usually identify the hierarchy as the dominant feature. Both continuous relationships and hierarchies, and blends thereof, may be produced from the same data, and it therefore seems foolhardy to continue the arguments as to which is valid. Both exist." The study which is made in chapters three and four is in fact an aggregate analysis of census data, but it distinguishes as far as possible what hierarchical, and other factors, determine the pattern of trade in Great Britain. There are some hierarchical conclusions which may be drawn from this data. Comparisons are to be made with some existing studies of urban hierarchies.

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2 B.J.L. Berry and H. Mayer, Comparative Studies of Central Place Systems, Final Report No. NR 2121-18, NR 389-126, Geography Branch, U.S. Office of Naval Research, February 1962, P. 29.

In retailing many outstanding problems could be solved if it was possible to define with reasonable degrees of certainty the size of the market. In economic theory the size of the market is often taken as given, in a geographical study it is supremely important, for spatial differences are largely the result of variations in this one factor. Vertical differences in the market (class, income and social differences) are of importance, particularly in the case of individual establishments or organisations. In the aggregate however it is probable that horizontal or spatial differences are even more significant. In Great Britain there is an increasing knowledge of the areas which look to certain towns for particular functions. Geographia[3], using the sales of evening newspapers and the accessibility of towns as bus centres as criteria, has published maps which delimit the areas which are subsidiary to third and fourth order centres. The relationship between retail sales in the region, including the centre itself "corresponds very closely with our estimate of what the total consumer purchases by the population of the whole region are likely to be, whenever they are made." In fact for two regions, the

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3 Geographia - Great Britain, A Marketing and Media Survey, 1961 Introduction Part 2, pp 9-12.

Leicester and the Oxford marketing regions, Geographia was able to estimate sales to degrees of accuracy set out in Table 3A.

Table 3A Geographia's estimates of retail sales expressed as a percentage of the expected sales (at the national sales per head)

Region	Total Retail	Clothing	Furnishing	Food
Leicester	99.8	99.7	98.5	101.3
Oxford	97.1	94.8	84.2	110.0
Bedford	88.0	83.1	82.7	97.0
Maidstone	92.0	95.3	89.0	96.2

Not all regions are as self-contained as this, for most of

Geographia's areas are delimited by one characteristic, evening newspaper circulation, and anomolies clearly exist, the result of the activity of individual newspapers. It would be possible to obtain higher degrees of accuracy by using several methods to delimit the hinterland. However, like Bedford and Maidstone, some regions are not so self-contained, since centres of higher rank than the third order draw significant proportions of their trade. In densely built up areas the problem is more involved, although L.P. Green[4] in a study of South-East Lancashire has shown that a simple grouping of urban administrative units can achieve fairly comparable results. The regions being considered are those which are self-contained particularly for occasional shopping needs. Smaller, or

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4 L.P. <u>Green Provincial Metropolis</u>, London 1959, Chapter Seven.

fourth order regions may well be self-contained for frequent needs. In terms of the towns found inside third order regions it is difficult to distinguish clearly defined types for the occasional needs, as some such demands are fulfilled by almost all towns. At lower levels of the hierarchy than these third or fourth towns Berry[5], amongst others, has demonstrated that it is possible to distinguish between "hamlets, villages and towns" in qualitative terms. Higher levels however are only distinguishable in quantitative terms (e.g. the number of alternative suppliers of a particular good) rather than in qualitative terms (e.g. the appearance of suppliers of different types of good).

Third order regions are distinguishable from all regions of lower rank by the fact that they, alone, cater for all types of demand. In a fourth order region, of a fourth order centre, some demand is fulfilled by traders situated outside the region. Since all shopping trips may include purchases of very different commodities (e.g. a woman buying clothing may also do some food shopping) it

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5 Berry op. cit. He attempts to distinguish a fourth category in his hierarchy - "a city" - with a population of about 10,000 in Iowa. It would seem that his evidence for this is not so conclusive as for the lower orders of the hierarchy. It is interesting to note however that there are towns in Britain which would seem to be very comparable with these cities (e.g. Penrith and Evesham).

is theoretically impossible to delimit completely self-contained areas of lower than the third order for any type of shopping. Reilly[6] in his classic Law of Retail Gravitation stated that the 'pull' of a town is in general directly proportional to size, expressed in terms of population, and inversely proportional to distance squared. This however is only truly applicable, as Losch[7] has pointed out, when the two towns are of equal rank. The reason behind this, is that towns of one rank have not only a wide hinterland corresponding to that rank, but also have the more restricted hinterlands of lower ranking places. Definition between the two types is fairly clear, but there are considerable differences between the hinterland of, say, a fourth order centre, and the fourth order hinterland of a third order centre. The latter will be more extended, as a result of the greater attractiveness of the third order centre. It is therefore extremely difficult to construct a theoretical scheme which could effectively inter-relate the urban hierarchy and retail trading. Further problems confront an empirical study in Great Britain. In chapter two it has been shown that an effective study should really consider each trade separately. Local data giving a trade breakdown is

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6 W.J. Reilly <u>The Law of Retail Gravitation</u>, New York, 1931.

7 A. Losch "<u>Economics of Location</u>" New Haven, 1953, P. 411.

limited to towns with over 25,000 people.

Something of the spatial structure of retailing can, however, be illustrated by the use of aggregate figures. An area which exhibits classical features of the urban hierarchy is Herefordshire, with the County Town acting as the third order centre, and a series of market towns, Leominster, Ledbury Ross, Kington and Bromyard acting as fourth order centres. Table 3B shows some of the trading characteristics of these towns. There is a distinctly

Table 3B Herefordshire Retail Trading

Region	1	2	3
Hereford	56,940	133.7	148.3
Leominster	14,707	84.5	104.8
Ledbury	10,300	72.4	98.0
Ross	15,000	90.3	97.8
Kington and Bromyard 4	18,112	41.7	104.5

1 = Population of fourth order region (Estimate of "West Midland Group")

2 = Sales per head (£'s) of region's population in the town

3 = Sales per head (£'s) of region's population, adding £34 as an estimate of the purchases of the hinterland population in the hinterland, as against the town itself (this is the Census figure for areas outside the four towns).

4 = Kington and Bromyard, no census data are available, but the West Midland group calculate that there are nearly as many shops in these two towns put together as in Ross, the sales are calculated on the basis that there is no difference in size between the shops.

higher figure for retail sales per head in Hereford in contrast to the other regions, a reflection of the third order functions of the county town. Other towns show great variations in per capita sales, except where some estimate of purchases made in the hinterland have been made.

Fleming[8] in a study of Scotland has achieved results which would appear to contradict this thesis. He found that there was a close relation between sales of a central place and the population of trading areas for areas with a population under 30,000 (figure 3A). He did however point out that the relationship was considerably less close for larger areas, something which he explained in much the same way as the Herefordshire example. Fleming however made no estimate of the proportion of sales made in the hinterland area. In Herefordshire there is a very low correlation for such uncorrected figures and it is difficult to arrive at a satisfactory estimate. The reason why Fleming found such a close correlation is of interest. In Scotland, as a result of low population densities and physical barriers, the classical pattern of a "nested hierarchy" of trading areas is poorly developed. There are few centres which rank as third order centres in the English sense, and so many fourth order centres take on their functions, since a journey to one of the provincial

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8 J.B. Fleming "An analysis of shops and services trades in Scottish Towns" Scottish Geographical Magazine Vol. 70, 1954, P. 97-106.

capitals is a rare occasion. Fourth order regions are in fact far more self-contained than their English counterparts. In retailing this finds expression in a rather lower degree of specialisation amongst traders.

The trading area of a town may be considered to be composed of three sections: intensive, extensive and fringe areas.[9] As yet it is impossible to give statistical meaning to these three zones, for this would only be possible after exhaustive local studies which have been beyond the scope of British geography. This study, therefore, turns to an examination of the towns themselves, in order to distinguish some of the regularities in the pattern of retailing which is the end result of the flow of customers to shopping centres.

THE DATA

Before examining each of the main characteristics of retailing a short note on the meaningfulness of the data on which this examination is to be based is a necessity. The data of the Area Tables of the Census of Distribution are provided for urban administrative areas, which are not all "centres" or indeed "towns". Some areas are suburban sections of towns and some may contain several centres

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9 H.E. Bracey, Towns as Rural Service Centres: An idea of centrality with special Reference to Somerset, Institute of British Geographers, No. 19, 1953, P. 98.

of equal rank. The distribution of shops within each area may vary considerably, and this will influence the statistical "average shop". In addition the proportion of a town contained in an administrative unit will vary considerably; some administrative areas will contain the central shopping areas and only a small proportion of the neighbourhood shopping centres of a town, whilst others will contain all the built-up area of a town. Some of these considerations are examined in section four for County Towns. The only statistical information which is available is that resulting from a Board of Trade[10] sample survey made in preparation for the 1961 Census of Distribution.

The Board of Trade surveyed six towns of different character, although not of completely different type. The findings of this study are set out in Table 3C below. The

Table 3C

	Total Retail Trade 1957			Trade in central area		
Town	Shops	Sales £'000	S/E* £'s	% shops	% sales	S/E £'s
Doncaster	1151	21,369	18,565	40	67	30,724
Gloucester	798	15,192	19,037	35	66	35,778
Torquay	749	11,626	15,522	42	67	24,506
High Wycombe	452	9,198	20,349	39	63	33,098
Ashford, Kent	316	5,010	15,854	52	68	20,853
Nottingham	4331	43,040	19,937	14	44	30,566

* S/E is the standard abbreviation for sales per establishment

10 Census of Distribution for 1957 - Further Analyses of Retail Shops, Board of Trade Journal, 5th August, 1960.

remarkable feature of these results is "that in towns other than Nottingham, the proportion of the total trade handled in the central area was very similar." The size of establishments was not so similar. The factors which explain these differences are not easy to distinguish from such a small number of towns, especially as no objective method of delimiting the central areas was adopted. There is no reason why the central area of Gloucester should have larger shops than Nottingham.[11] A priori the reverse would be expected for Nottingham is clearly a more important shopping centre. This evidence suggests that there are no average economies of scale above an average size of shop of £35,000, which is a size which is found in towns of the size of High Wycombe. Even in the West End of London it seems unlikely that shops, on average, are much larger than this: in Westminster they average £28,121 and in St. Marylebone £33,550. Larger department stores are found in these centres, but there are clearly possibilities in them for smaller speciality shops.

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11 In fact since the data for Nottingham refers to 1950, rather than 1957, shops there may be larger. Price changes during the period would probably give shops there an average turnover of £39,640 in 1957. Other changes will also have resulted in differences.

The amounts of information available for different sizes of town vary considerably. For towns with a population over 25,000 the Census provides a complete trade breakdown. For smaller towns however the only figures which are provided are totals for all the Retail and Service Trades, thus in addition to the retail trades, which are the specific subject of this study, the service trades which include such trades as caterers, hairdressers, shoe repairers, and motor dealers are included. In Great Britain these trades account for 15.4% of total sales and 22.5% of establishments so the total pattern will be considerably influenced by their distribution. There are therefore two rather different studies in this section: chapter three considers all towns, and chapter four only large towns.

CHAPTER THREE

ALL TOWNS

Retail sales per head of population

The level of retail sales per head of the population has been used by many students of urban areas. Moser and Scott[1], for instance, call it "a traditional index of prosperity". As such, however, it is far from precise as their simple regression analysis has shown, the highest correlation coefficients being:-

0.566	%	illegitimate births 1950-1952
0.536	%	illegitimate births 1953-1957
0.475	%	occupied in finance
-0.459		job ratio
0.454	%	population aged 65 and over
-0.427		Population change 1931-1951 % due to natural change
0.426	%	one person households
-0.417	%	population aged 0-14

It is of interest to note that the correlation coefficient of Sales per head against population is only 0.140. Hinterland studies achieve far higher correlations than this for all ranks of town. Fleming[2] for instance obtained a correlation of 0.96 in Scotland.

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1 Moser and Scott, British Towns, London 1961, P.33.

2 Fleming, An analysis of shops and service trades in Scottish Towns, Scottish Geographical Magazine, Vol. 70, 1954, P. 100.

For the study of small towns, the simple quotient, unadjusted for the hinterland population, of retail sales per head is however still of much interest. Large towns, on the other hand, have lower per capita sales than small ones, for the proportion of sales in these towns, which is attributable to the hinterland population, will be smaller than in the small ones, since they have many functions other than service centres[3]. Towns whose size is a close reflection of their retail functions may be grouped into four categories on the basis of per capita sales:-

A	sales over £250
B	sales £220 - 250
C	sales £200 - 150
D	sales under £120

These categories, as it will be seen, are distinguishable to some degree in most regions. Towns of the first, however, are exceptional in England and Wales. In Scotland the special significance of many of the small towns, and the absence of many advantitious[4] industries in these towns, means that many have very high figures. Those cases in England and Wales with comparably high per capita sales

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3 This feature is referred to below as the "hinterland factor"

4 Adventitous is used here for industries in the sense adopted by Stamp for population - i.e. the population found in rural areas which has no immediate connection with the rural economy.

are usually the result of unusually high hinterland populations.[5] Towns in group B are especially interesting. They are market towns of particularly great importance, and include many towns which are comparable with the "city" class referred to by Berry (see P. 79). In Carruthers' scheme of classification they are mainly 4A centres. Group C is composed of ordinary market towns, while those in group D are urban areas which are residential and industrial suburbs of the conurbations.

Figure 3B shows the value of sales per head by urban areas in regional groupings, and demonstrates that most of the industrial areas basically have a bimodal frequency distribution (the North, Yorkshire, the North Midlands, Wales, and Warwickshire and Staffordshire). The two 'populations' found in these areas are either urban areas which have central functions, or those which do not. The former have a net gain of retail trade, while the latter have a net loss. In the Northern region, however, a third mode appears. This is a reflection of the presence of a number of small towns of group B in the rural half of this region. In the remaining regions of Great Britain rather different frequencies can be observed, since

5 L.S. Jay in a personal communication, 2.1.1962, notes that Blandford Forum and Diss, with two of the highest per capita sales figures, have large military bases in their hinterlands.

in these regions far more urban areas have central functions. In the Home Counties variations, as can be expected, are small. In the South some suburban areas near Southampton, Brighton and Bournemouth have low values, and some towns of group A have high values in an essentially normal distribution. In the West a positive skew is revealed, since almost all towns have important central functions. In Scotland, in contrast, a negative skew reflects the fact that the majority of urban areas there are industrial in character. The length of the 'tail' of the distribution shows the importance of some very small towns in that region. In the Welsh Marches and East Anglia the trimodal features of the northern region are even more prominent. The important market towns of group B, the ordinary market towns and the regional centres, and suburban areas may be clearly distinguished in these areas.

In the North figure 3C shows that the relationship between average per capita sales and the figure for each town becomes closer as towns increase in size. There are however some very important deviations from this general pattern. Newcastle (£192) has a percapita sales figure commenserate with its regional significance, if the general relationship described above is remembered. This figure is far higher in fact than those for other similar towns:-

Manchester	£179	Leeds	£147	Sheffield	£124
Nottingham	£168	Cardiff	£142	Liverpool	£123
Derby	£165	Glasgow	£137	Stoke	£122
Leicester	£163	Birmingham	£135		
Edinburgh	£153	Bristol	£124		

It, and the other variations found in this list, may be explained by the proportion of the conurbation which is found in the central City. In the case of Newcastle the dominance of the central shopping area, over the suburban shopping centres of the Tyneside conurbation, seems to be marked, and some of the secondary shopping centres within Newcastle C.B. attract considerable custom from outside its boundaries.

Carlisle (£193), the sub-regional centre in the Western section of the region, has a figure which may be taken as an even truer reflection of its regional importance. Scarborough (£234) has a value of per capita sales indicative of the high purchasing power of its residents and of its large numbers of holiday visitors. Darlington and Stockton, two other large towns with important regional functions, reflect these functions with fairly high figures.

Small towns in the region may be grouped into three of the four general categories described above, there being no places with sales of the first order:-

Group B (£200-260)	Group C (£160-180)		Group D (under £100)
Hexham	Morpeth	Cockermouth	
Northallerton	Alnwick	Windermere	The remainder
Keswick	Whitby	Durham	
Malton	Richmond		

The only exceptions to this are Barnard Castle (£197) which would normerly rank in group B, except it has a restricted hinterland in view of the relief of Teesdale; Amble (£123) and Pickering (£144).

The West and East Ridings of Yorkshire reveal a very different trading pattern from that of the North. Green[6] has related sales figures to hinterland populations in the West Riding, and found that three towns, Harrogate, Bradford and Leeds, have a markedly higher than national average per capita sales figure for their fourth order trading areas' populations. Ignoring the hinterland populations figure 3C shows that per capita sales rise to a level of about £150, a rise which is only slightly related to size of town. Large towns in fact all have per capita sales of about £150. The only towns with higher figures than this may be explained as special cases. One feature of interest is that the largest towns of all have rather lower per capita sales than the average. This is the

6 F.H.W. Green, Community of Interest and Local Government Areas, Public Administration, 34, 1956, PP. 39-49.

result of the "hinterland factor", but also in this particular case, of the conflicting claims to supremacy of the largest towns, Leeds, Bradford, Hull and Sheffield, and of the very special regional significanceof smaller towns like Doncaster, Huddersfield, Wakefield, Barnsley and York.

Towns in the region with high sales per capita are headed by Harrogate (£208), which has a very high level for a town of its size, owing to its special social characteristics. Other important towns are places like Skipton (£223), Ripon (£208) and Selby (£174), situated on the edge of the main industrial areas. In the East Riding Driffield (£197) has considerable significance as the market town for the Wolds. Beverley (£136) loses trade to Hull, only ten miles to the South-East, and has a larger population than its central functions would warrant, as is shown by the numbers which travel to Hull to work. Many of the smaller urban areas in the West Riding fulfil little more than the immediate needs of their inhabitants, having sales figures below £50 per head. Places like Dodworth, Worsborough, Stanley, Darton, Conisbrough, and Darfield fall into this group.

The special significance of large towns in the retailing pattern of Lancashire and Cheshire is similar to Yorkshire since in both regions few areas are far from towns of this type. Freeman[7] in his discussion of the Manchester conurbation has shown how the census figures reflect Fawcett's conception of the South-East Lancashire conurbation as a multi-centred urban region. Rather surprising is the great difference between Manchester (£179) and Liverpool (£123). Freeman suggests that both Chester and Southport draw significant numbers of customers from Liverpool's hinterland, owing to their special attractiveness to particular types of shopper. Even so the difference is considerable. The highest figures of all in the region are found in Blackpool, Preston, Wigan, Warrington, Southport and Lancaster which are clearly all towns with special urban functions. Other places with high values include the specialized settlements of Morecambe, Lytham and Crosby. Small towns with high values are places found considerable distances from the main centres, like Grange, Ulverston, Clitheroe and Carnforth. In Cheshire towns like Knutsford, Northwich and Nantwich are important, having significant rural hinterlands for which they supply most retail services. Chester (£316) is the main point of interest in the county for it has an extremely high figure. This is partially a reflection of its great importance as a

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7 T.W. Freeman, <u>The Conurbations of Great Britain</u>, 1959 p. 144.

shopping centre, but is also a result of the extent of the Chester conurbation. Robinson[8] estimates the population of the conurbation as 72,000. If the suburban population (the population of the Chester C.B. is 48,680) spends £50 a head in the city, as would seem likely from Hoole, a suburb for which the census does give data, the remaining sales of Chester would be £13.9 million, which means that expenditure is £209 per head, a figure which corresponds more truly to Chester's regional significance and the spending power of its population.

In Warwickshire and Staffordshire there is the same general tendency for per capita sales to increase to a certain level (£130), and then to be of fairly constant value. All large towns have high values, and to this extent it is true to say that sales per capita increase with town size. Wolverhampton (£168) is however the only one of the four largest to show this clearly. Stoke, Coventry and Birmingham have figures between £121 and £135. In contrast four medium sized towns which have figures between £134 and £154 are Nuneaton, Rugby, Stafford and Burton. Leamington, one of the exceptions that does exist, has per capita sales of £201, which may

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8 G.W.S. Robinson, British Conurbations in 1951 : Some Corrections, <u>Sociological Review, New Series Vol. 4</u>, 1956, P. 91-97.

be explained, first by higher purchasing power of its inhabitants, and second by the attraction of many of the inhabitants of Warwick to its main shopping centre. A joint per capita sales figure for these two towns is £169. There are a number of small towns which may be classified in group B, such as Tamworth, Litchfield and Uttoxeter. Stratford (£251), with its special functions, is more comparable to centres in group A.

In the North Midland region all major towns have values above the median. The "hinterland factor" is clearly operative in the region for Lincoln (£178), Peterborough (£183) and Mansfield (£183) while the largest towns Nottingham, Derby, Leicester and Northampton have lower values. The high value of Mansfield, perhaps a rather unexpected member of a group including two County Towns, is a reflection of Mansfield M.B's situation in a wider conurbation of 141,000 people. Smaller towns in the region fall fairly readily into the groups distinguished above:-

<u>Group A</u>	Skegness
<u>Group B</u>	Bakewell, Ashbourne, Brigg.
<u>Group C</u>	Bourne, Grantham, Sleaford, Louth, Horncastle, Gainsborough, Newark, Clay Cross, Buxton, Oundle.

A further group of towns which have per capita sales larger than £194 lie between groups B and C. They include Stamford, Oakham, Market Harborough, Boston and Spalding, and generally are more similar to the former group than the latter.

The majority of urban areas in the Home Counties have per capita sales fairly close to the average, since, apart from the West End of London, shopping trips in this region are not concentrated on a limited number of centres as in other regions. Four, however, have significantly higher figures than the rest: Guildford (£234), Canterbury (£240), Horsham (£238) and Chichester (£219). Each of these has special regional functions, but some of these high sales must be the result of the higher purchasing power of their inhabitants. Other towns which have regional functions, may be distinguished by figures over £170 per capita:

<u>Hertfordshire</u>: Bishop's Stortford, Watford, St. Albans, Hertford, Hitchin.
<u>Essex</u>: Chelmsford, Saffron Walden, Halstead, Colchester.
<u>Surrey</u>: Dorking.
<u>Kent</u>: Tunbridge Wells, Sevenoaks, Maidstone.
<u>Sussex</u>: East Grinstead, Lewes.

In contrast purely suburban areas have low figures. This is true even for such large areas as Thurrock (£83), Gillingham (£76) and Hornchurch (£65), which might have been expected to be rather more self-contained than these figures indicate (i.e. they have net outflows of trade amounting to between 29.7% and 44.9%, at a national estimate of sales per head).

An interesting contrast in the Southern Region exists between Southampton (£143) and Portsmouth (£123) on one side, and Oxford (£202) and Reading (£190) on the other. This is partly a reflection of the larger size of the two ports, and hence the operation of the "hinterland factor", but is also of a reflection of their smaller regional significance and differing social structure. Bournemouth (£236) is a special case. Six small towns have particularly high figures: Wallingford (£238), Wimborne (£259), Dorchester (£265), Newbury (£275), Bridport (£282) and Blandford (£351). Blandford's special position has already been noted. The others, with the possible exception of Wallingford, which has special functions as a "watering-place" on the Thames, are clearly towns with special regional significance.

In the West Region the largest towns, Plymouth (£116) and Bristol (£124), have very low sales figures, lower, for instance, than Southampton. More significant in the trading pattern are the County Towns: Exeter (£174), Gloucester (£185), Yeovil (£207), Taunton (£211), Salisbury (£212), Truro (£262). Small towns are not so easily grouped as in other regions for holiday populations give many additional sales to their regional function, but even so the most significant places like Launceston (£289), Newton Abbot (£231), and Cirencester (£212) can be distinguished from these figures. Malmesbury, owing to its distance from a major centre, has a hinterland population larger than its own population so accounting for its high per capita sales (£255).

In East Anglia and the Welsh Marches the larger towns fall into three groups. First, there are the County Towns, including Hereford, Shrewsbury, Worcester and Bury St. Edmunds, which have values over £228 (i.e. higher than all towns of comparable size, save for Guildford, Scarborough and Chester). Second, there are other regional centres, which include larger towns like Norwich (£183) and Cambridge (£189), and less important ones of equivalent size like Bedford (£203), Wisbech (£211) and Kings Lynn (£213). Third, there are towns which have, in comparison, little regional importance: Ipswich (£158), Yarmouth (£152), Stourbridge (£145), Luton (£140) and Lowestoft (£131). This would seem to be remarkably realistic division of these towns in relation to the significance as shopping centres, and what is more the spacing between each town is also realistic. Small towns fall fairly readily into the four general categories suggested for these towns. The first two of which are shown below:-

<u>Group A</u> - Diss, East Dereham, Oswestry, St. Ives, Cromer, Hunstanton.

<u>Group B</u> - Sudbury, Newport (Salop), Downham Market, Market Drayton, Bridgnorth, Ledbury, Leominster, Ross, Evesham, Swaffham, Ludlow, Stowmarket, Thetford.

Swansea?

In Wales the existence of two distinct types of economic landscapes means that there is a wide range of conditions. In the industrial area of the coalfield per capita sales increase with town size, so that Cardiff (£142) has an average which gives it a fairly high rank amongst provincial capitals. Particularly important centres in the coalfield like Neath (£165) and Llanelly (£166) do have higher figures than this but they are few in number. Smaller towns, which include both industrial and other settlements are found distributed roughly in the four per capita sales groupings. There are those which belong to group A like Pwllheli (£308), Tenby (£271), Llandudno (£258) and Carmarthen (£238) which all have rather special functions. There are important market towns like Chepstow (£197), Welshpool (£186), Caernarvon (£191) and Aberystwyth (£195) in a group with sales over £160. Then there are towns which do not lose much trade, but act as fourth order centres for a limited hinterland. Only Porthcawl of the urban areas of the coalfield is found in this group, and it is clearly distinguished, by its resort functions, from the other towns of the area.

non-coalfield?

In Scotland the dispersion of values, shown in figure 3B, is revealed in more detail in figure 3C to show little relation to the size of town. The most noticeable feature is the high sales per head index of a number of isolated towns:-

Kirkwall	(£277)	Castle Douglas	(£335)	Dingwall	(£341)
Thurso	(£286)	Fort William	(£338)	Turriff	(£378)
Kelso	(£333)	Kirriemuir	(£339)		

The special importance of these towns has already been noted (P. 82). Larger towns with high sales are those which Fleming[9] found to have higher sales than their fourth order hinterland warrants. They are Inverness (£235), Dumfries (£229), Stirling (£212), Ayr (£206), Perth (£195), Falkirk (£191) and Kilmarnock (£172). It is significant that these towns have per capita sales equivalent to most English County towns of comparable size and status. They are in fact third order centres. The largest towns have considerably lower per capita sales than these towns, it is significant that Edinburgh has higher sales than Glasgow, and Aberdeen higher than Dundee. These variations are reflections of the importance, in relation to their size, of regional functions to these towns. Edinburgh is not a much more important centre than Glasgow, but since it has a smaller population its regional functions may be said to be relatively more important.

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9 Fleming <u>op. cit</u>.

Population Per Establishment

The numbers of separate establishments engaged in retailing is of interest on two counts. First, in economic terms, the number of establishments selling goods is linked with total costs of distribution. Second, in social terms, it is often the task of planners to estimate a desirable number of new establishments to place in a developing area. Some studies have analysed temporal variations in this index, but few have investigated spatial differences in any detail.

Ford[10], by using estimates based on directories, examined the numbers of shops found in Yorkshire and certain towns found elsewhere, during the period 1901 - 1931. He found that total numbers remained constant, but there were considerable changes in the numbers of different types. This was explained by Ford as a consequence of increasing sales productivity in shops selling staple articles, which had decreased in number, and by the increased consumption of luxury goods with rising incomes, shops selling which had increased in number.

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10 P. Ford, Competition and the Number of Retail Shops, 1901 - 1931 Economic Journal, 1935.

and Excessive Competition in the Retail Trades, Changes in the Numbers of Shops, 1901 - 1931, Economic Journal, 1936.

Ford accounted for almost all the fall in numbers of shops in staple goods to the economies of "massive retailing". He noted that numbers of new shops had been constructed on housing estates, but failed to consider that these did not keep pace with rising populations or the clearance of older housing areas, which do of course have high densities of establishments. In fact, if the same total population was to be served, productivity was forced to increase. The changes were a result of changes in the spatial economy rather than a cause of these differences.

Hall[11] has produced evidence from the U.S.A., relating the number of shops per 10,000 people in each state to levels of per capita income. In 1920 no significant correlation between the two variables was recorded for food shops, but in 1948 a strong negative correlation was found. She explains this feature by stating that high productivity in food trading, the result of self-service techniques, is likely to be greatest in the weathly regions, because of the extra spending power available there and the attractiveness of other occupations in these areas. Later she[12] explains a relatively small size of

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11 Hall op. cit. 1961, P. 20-21, Fig. 1 and 2.

12 Ibid, P. 83.

shop in these regions by stating that in wealthy markets demand becomes differentiated and so speciality shops are able to trade satisfactorily. These two accounts would seem to be self contradictory. A more reasonable explanation of the pattern for food shops is that in the wealthy regions far more new building occurs, and the congestion of city centres is most advanced so more new shops are built, and more of the old ones are pulled down. It would seem that construction will operate with a time lag after demolition. It may be concluded that the spatial element is of considerable importance in explaining these temporal variations.

What spatial characteristics, then, determine variations in the frequency of separate establishments? The relation of a town to its hinterland is clearly a factor of major importance. Urban areas which do not have central functions have relatively few shops, while those which are important centres have large numbers of shops. This relationship is however not a fully direct one. Size is so closely linked with number that to separate the two is impossible. However in those cases where the urban component of a trading area is proportionately greater than the rural component, the number of people to each shop will be relatively great. Green[13], in fact, has related population to the number of establishments in a town in the South West, and achieved a coefficient of correlation of 0.73. He found that this very close relationship was departed from in two types of case. Resorts, since he was unable to estimate the importance of holiday population, had far more shops than other centres. Major shopping centres had fewer shops than average, although some of this may be accounted for by shops found in the

Table 3D Population per Shop, relation between trading area population and number of shops (after Green)

	1	2		1	2
Torquay	57	47	Gloucester	94	94
Plymouth	93	70	Bath	95	95
Bristol	86	73	Exeter	111	105
Weston	74	81	Taunton	142	115
Cheltenham	70	85	Salisbury	156	121
Swindon	103	91			

1. $\frac{\text{Population Trading Area}}{\text{Number of Shops}}$

2. $X = 167 - 120 \frac{\text{Town Population}}{\text{Trading area Population}}$

hinterland areas, much of it must be a reflection of the larger size of establishments in these towns - the County

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13 F.H.W. Green "Relationship between the number of shops in an Urban Centre and the population served by that centre." Unpublished manuscript, Ministry of Housing and Local Government 1949 (?).

and Green, Transactions of Institute of British Geographers 1948.

Towns ranking particularly low in this list. Large shops are not only those which fulfil occasional demands but also those which trade in food (see P. 153).

Other characteristics which determine the pattern can best be examined by reference to particular examples (figure 3D).

In the North values of population per shop, of the urban area itself, plotted against population show a triangular dispersion, with the largest towns being found at the apex of the triangle. This apex corresponds fairly closely to the regional mean; the urban areas have 70, and Newcastle 72 people per shop. A significant difference can however be noted between Darlington (58) and Carlisle (66). Darlington has more shops than Carlisle, although smaller sales. The greater significance of Carlisle as a regional centre will make it more difficult for small shops to survive the competition of those, like multiples, attracted to the trading possibilities of the town, who have superior capital resources to those available to the small independent. Alternatively this may be due to the more extensive areas of terrace housing in Darlington, with their concomitant numbers of parlour shops. No definite evidence, however, can be found to establish that there are larger areas of this type of housing. The total number of new houses completed per 1000 population between 1945 and 1958, which in Darlington number 44 and in Carlisle 76 would suggest this but it is far from conclusive. Scarborough with only 38 people per shop is clearly differentiated from other large towns in the region in this respect, as indeed it is generally in function.

Small towns in the North may be grouped into two types. The first includes:

Keswick (26) Northallerton (34) Penrith (36) Hexham (38)
Barnard Castle (32) Cockermouth (37) Whitby (37) Malton (42)

Also in this group are some less important market towns, but these have rather more persons per shop. In this first group are found all those towns classified as group B by per capita sales. Cockermouth and Whitby, group C centres for sales, appear in this group as a result of the operation of special features. Cockermouth probably has relatively few multiple traders, hence rather more and smaller shops than in similar places, since it is located so far from a close network of shopping centres (see chapter five). Whitby appears in this group because of its special holiday resort functions.

The second type into which small towns in this region may be classified includes the industrial and mining settlements of the region. Shops in these areas are run by large organisations: co-operative societies and multiples. Extreme cases in this group are:

Scalby	(199)	Seaham	(139)	Boldon	(132)
Longbenton	(142)	Seaton Valley	(138)	Billingham	(123)

which may be distinguished as suburban areas, areas of recent development or mining settlements.

In Yorkshire, Lancashire, Cheshire, Warwickshire, Staffordshire and the North Midlands there are more uniform economic landscapes. The only really significant differences exist in the subsidiary urban areas of major towns (Table 3E).

Table 3E Population Per Establishment selected Urban Areas

Yorkshire		Lancashire		Warwick & Staffs.	
Worsborough	134	Huyton with Roby	258	Aldridge	125
Haltemprice	130	Fulwood	170	Sohihull	110
Darton	129	Tottington	160	Wednesfield	107
Adwick le Street	121	Billinge	141	Tettenhall	100
Stanley	110				
Darfield	102				
Conisbrough	100				

Cheshire		North Midlands	
Hoole	128	Staveley	121
Bebington	118	Ashby Woodhouse	120
		Corby	115
		Mansfield Woodhouse	106

A high proportion of these are suburban areas of the major towns, and are areas which have high percentage population increases during the period 1931-1951. During this period planning authorities limited the development of new shops. In newly built areas independent traders would required more capital to commence in business than in those areas where there are large numbers of premises which could be easily converted.

Larger settlements in these regions generally show little variation in the number of their shops in relation to population. The only exceptions are large suburban urban administrative areas like Cheadle (89), Hoylake (87) and Ellesmere Port (94). These "newer" suburbs (they had an average increase of population of 28.6%) contrast completely with the "older" suburbs like Altrincham (49), Macclesfield (43) and Hyde (42) which had an average increase of 2.7% in the 1951-1961 period.

In the Home Counties the relationship between population and the numbers of shops is broadly similar to that found in regions examined above. Welwyn Garden City (190) is comparable with other new towns like Billingham and Corby. Hornchurch (134) and Thurrock (118) are examples in this region of the suburban pattern found elsewhere.

The three remaining regions of England have broadly similar patterns, although these are very different to those found in the industrial regions. They show a distinct tendency for the number of shops found in a town to fall in the larger towns. This feature, as noted by Green, has already been noted. Some deviants can be observed. In East Anglia, Old Fletton (112) is a suburb of Peterborough, and Kempston (94) is a suburb of Bedford. In the Welsh Marches, those parts of Worcestershire and Shropshire which are suburban parts of the West Midland Conurbation, have high figures: Dawley (91), Oldbury (88), Halesowen (84) and Bromsgrove (78). In the West, Torquay (24), and in the South, Bournemouth (52) have very different numbers of shops to towns of comparable size as a result of their resort functions. In both regions a number of suburban areas have few shops:-

Urban Area	Population Per Establishment	'Parent Town'
Torpoint	126	Plymouth
Charlton Kings	123	Cheltenham
Fareham	103	Portsmouth
Gosport	96	Portsmouth
Eastleigh	94	Southampton
Portland	103	Weymouth
Linslade	94	Leighton Buzzard

One town with an unusually small number of shops is Norton Radstock (111). This is explicable by a rather large size of shop (£9764) for its importance as a regional centre.

The relationship in Wales between population and the number of shops generally conforms to that found elsewhere. Pwllheli has the most shops, one to every twenty-one people, and Caerleon the fewest, one to every 111 people. Wrexham, Neath and Llanelly of the larger urban areas have relatively large numbers of shops, but otherwise there is nothing very exceptional in the pattern.

In Scotland, small urban areas have particularly large numbers of shops, a fact which relates well with the typical nature of the urban hierarchy in that county. Edinburgh, Glasgow, and the other major cities have values corresponding fairly closely to the linear mean.

Sales Per Establishment

In an aggregate analysis the average size of retail establishments is a very important index of the retail function of towns, furthermore it is the only major characteristic which can be analysed completely independently of population. The average size of retail establishments is affected by four major factors, viz; the type of trade conducted by a town's shops, whether it is for infrequent, frequent or convenience shopping demands; the type of organisation owning shops in the town; the total trade of the town; and the distribution of shops between main and subsidiary shopping centres within the town. Separate analysis of these factors is however limited by the nature of the Census figures. The first factor will be considered at length in chapter four for those towns for which a trade breakdown is available. The second factor is impossible to analyse comprehensively, it is however examined in succeeding chapters, and some organisational variations may be seen in an examination of wages. The third factor can be closely analysed. Figure 3A shows the relation between sales per head and size of establishment in towns found in those areas of England not directly influenced by a major conurbation.[14] This means

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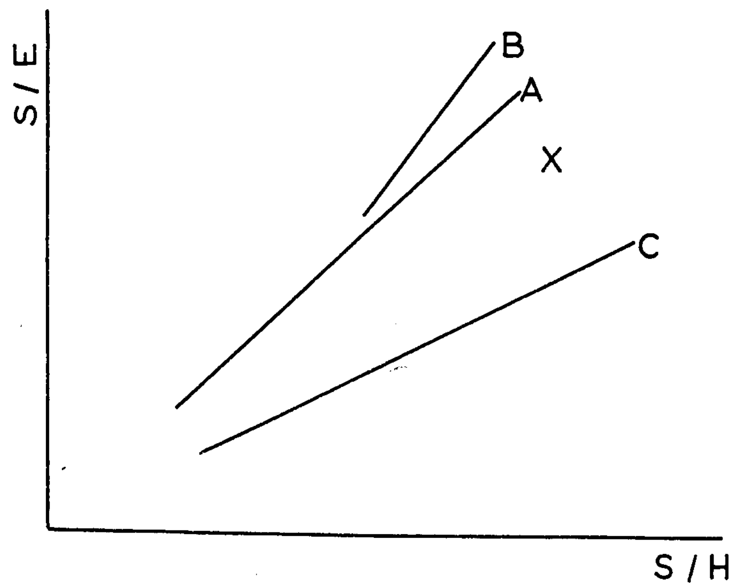
14. Lincolnshire, Soke of Peterborough, Huntingdon, Rutland, Cumberland, Westmorland, the South (except Sussex), the West, and the East (except Essex and Herts.), Hereford, Worcester and Salop.

in fact that most towns with a population over 100,000 are excluded, and since the fourth factor is of particular importance in these towns this exclusion is an added advantage for analysis. The relationship is mainly linear, but there are some trends which may be suggested in the diagram below:-



A represents the general increase of size with increasing sales per head.

B represents a slight tendency for some towns to have a size of shop not warranted by their sales. These towns are places like Oxford, Salisbury, Cheltenham and Taunton.

C represents the second major trend. The sales of market towns increase faster than the size of shop found in these towns.

X indicates a group of towns which stand somewhat apart from the trends A and C. They are found between co-ordinates of sales per establishment of £9,500 and £10,600 and sales per head of £194 and £230. They tend to be specially significant Market Towns of the type referred to above as Group B (the "cities").

They are:

King's Lynn	Evesham	Chipping Norton
Banbury	Stroud	Cirencester
Aylesbury	Newton Abbot	Bicester
Newmarket	Petersfield	

The fourth factor affecting the size of shops within a town is the distribution of these shops. The evidence of the Board of Trade's survey has been discussed in the Introduction to this Section. One remaining source are those towns which are spread over a number of administrative units. Table 3F shows the main features of these towns. Only one suburban unit, Kingswood, a suburb of Bristol has a larger average size of shop than its central town. This is a reflection of Bristol's small size of shop in 1950, before the construction of the Broadmead Shopping Centre, and of the presence of a particularly important secondary shopping centre in Kingswood. It is however something of an anomaly. The effect of suburban shops on the average size of central shops is not excessive, but is significant in every case. The greatest reduction in the average size is in the case of Newcastle, which shows a lowering of the average from £13713 to £11385 when adjacent urban areas are joined to it. This will be seen to be specially significant below.

As in the two previous sections of this chapter much can be learnt from an examination of variations within each region (figure 3E).

In the North two towns have significantly larger shops than all the remainder. Newcastle's role as the regional capital is well shown by the average size of its shops (£13,713). This, as in the case of sales per head, is

Table 3F

Size of Establishments in some Conurbations

Main Town	S/E (£'s)	Suburbs	S/E (£'s)	Joint S/E (£'s)
Bedford	11,620	Kempston	5,265	11,018
Slough	11,987	Eton	6,500	11,529
Cheltenham	12,598	Charltonkings	5,306	12,254
Macclesfield	5,806	Bodlington	3,479	5,574
Chester	13,553	Hook	6,366	13,130
Falmouth	9,863	Penryn	6,952	9,358
Plymouth	10,687	Torpoint	5,775	10,466
Plymouth		Saltash	7,750	
Bristol	9,048	Mangotsfield	5,141	8,940
Bristol		Keynsham	6,943	
Bristol		Kingswood	10,277	
Kidderminster	7,791	Stourpoint	5,662	7,165
Kidderminster		Bewdley	4,160	
Brighton	9,411	Hove	8,835	8,822
Brighton		Southwick	5,490	
Brighton		Shoreham	6,239	
Brighton		Portslade	5,274	
Southampton	10,921	Eastleigh	8,604	10,641
Weymouth	9,436	Portland	5,167	8,464
Bideford	7,960	Northan	3,547	7,065
Grimsby	7,230	Cleethorpes	4,710	6,629
Peterborough	10,340	Old Flelton	5,208	10,000
Newcastle	13,713	Gosforth	8,737	11,385
Newcastle		Gateshead	7,284	
Newcastle		Newburn	6,852	
Newcastle		Long Benton	7,585	
Newcastle		Wallsend	8,111	

considerably higher than other comparable towns:-

	S/E (£'s)	Rank S/H		S/E (£'s)	Rank S/H
Edinburgh	11,457	4	Derby	8,908	9
Glasgow	10,942	7	Birmingham	8,905	8
Cardiff	10,148	6	Leicester	8,719	3
Manchester	9,651	1	Nottingham	8,701	10
Liverpool	9,563	11	Sheffield	7,630	12
Leeds	9,184	5	Stoke	7,040	13
Bristol	9,048	9			

This list should be compared with the list on p. 91, which shows the per capita sales of these towns. Table 3F shows that Newcastle's high average figure may well be the result of the administrative structure of the Tyneside conurbation. Although it may be somewhat of an aside it is of interest to examine the thirteen towns mentioned above together. The large average size of shops in the two Scottish cities and Newcastle is probably due to the high density of households in these cities. The order of these fourteen towns (those listed above with Newcastle) has been compared with the variables listed by Moser and Scott.[15] The closest relationship is with overcrowding figures, when a mean deviation of rank of 2.8 is recorded. The next closest characteristic is the percentage of social class I and II, when a mean deviation of 3.4 is recorded. Other variants are less closely related.

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15. Moser and Scott, op. cit.

In the North, the second town which may be distinguished with particularly large shops is Carlisle (£12,370). This is the regional centre of the western part of the region and its large average size of shop clearly reflects this function. Three other towns have average figures of over £10,000 in the region. Sunderland, with an average figure of £10,225, is important enough as a centre to have a large central shopping area, has overcrowding figures higher than Newcastle, and probably has an unusually high proportion of its shops run by multiple organisation. Ashington (£10,597) and Chester-le-Street (£10,333) are interesting examples of shopping centres found on the periphery of a major conurbation area. They are near enough to this area to have been colonised by multiple organisations based on the conurbation, but are sufficiently far away from it to have fairly large hinterland populations. Other towns in the region grade very much according to their regional significance, although the significance of organisations which control large shops can be seen as a factor leading to anomalies like Seaham (£9695) and Seaton Valley(£8958) where co-operative shops are of particular importance.

In Yorkshire the special significance as shopping centres of medium sized towns in relation to the major towns of the county is clear from their fairly large size of shop. Barnsley (£8752), Doncaster (£8802), Huddersfield (£8206), Rotherham (£8,083), York (£9025) and Wakefield (£7808) all have relatively large shops (the average size of shop in the West Riding is £7209). Leeds, the regional capital, does it is true have larger shops (£9184) than these towns but these are considerably smaller than might be expected, even though it ranks sixth in the list of provincial cities (tableP.115). Bradford and Huddersfield have shops with an average size comparable to the other towns, and Sheffield far smaller shops. Harrogate once more gives indication of its special character by having large shops (£10,569). The only small town in the region with relatively large shops is Skipton (£9,591), which might well be compared with Chester-le-Street and Ashington in its location and general trading pattern.

In Lancashire large towns are generally rather more important than the medium sized towns. The towns which have particularly high figures are Blackpool (£8557) and Southport (£8510), which both have special importance for shopping trips. Another medium sized town with large shops is Warrington (£7879), something which is not easily explained. The largest average size of shop is found in Crosby (£14,552), and Huyton's shops, although so few in number do have a high average figure (£9856). Lancaster (£10,039) reflects the general trend of regional centres quite clearly.

In Cheshire only Chester itself is of special significance. It has an extremely high density of shopping and in consequence is found to have an average size of shop £13,553.

In Warwickshire and Staffordshire the first significant point to be noted is that Birmingham, Stoke and Coventry (£8826) all have rather small shops in relation to their regional significance. In contrast Wolverhampton (£10,725) has larger shops. No ready explanation can be advanced to explain these variations, it may be that the redevelopment schemes since 1950 will have altered this picture considerably, and that 1950 reflected an unusual situation. Other towns with relatively large shops are those with significant central functions include: Nuneaton (£8,889), Rugby (£9093), Stafford (£9062), Tamworth (£8,936) and Lichfield (£9239). Two towns in the region which have special functions, Stratford (£12,311) and Leamington (£11,187), reveal these in the size of their shops.

Nottingham, Leicester, Derby and Northampton all have an average size of shop very similar to Birmingham and Coventry. The reasons for this midland pattern are far from clear. The relatively small size of Nottingham's central shops, as shown in Table 3C, suggests that central shopping may be rather less well developed in this area than in other regions of the country, and gives support to Brown's[16] supposition that the importance of these cities as shopping centres has been exaggerated, or at least so would seem to be the case in 1950. However there is not a great difference in size between the shops of these cities and other cities. It will be of considerable interest to examine the data of the 1961 Census for it may well be that 1950 situation was particularly unusual, and considerably underestimated the importance of these cities, as a result of building restrictions in force at that time. Department stores in 1950 were particularly affected by these controls.

Four towns in the North Midland region do have shops which are significantly larger than the average. The two most important are Lincoln (£10,314) and Peterborough (£10,340), which as the figures show are remarkably similar. The new town of Corby (£11,265) reflects its planned character, and its high proportion of multiple traders, with a large size of shop. An exceptional case is Clay Cross (£11,386), without a detailed survey no full explanation of its large average size of shop may be advanced. It is one of the many local variations which it is the purpose of this general study to reveal to be of general interest.

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16. P.A. Brown, Centres of Retail Distribution in the East Midlands, East Midland Geographer, No. 6, Dec. 1956, p.7.

In the Home Counties no clear pattern exists, for the dominance of the West End of London has meant that few other shopping centres in the region exist which have marked superiority over neighbouring centres. In addition there are few differences in the organisational pattern of trading, since distances both actual and mental, are small, and in consequence multiple organisations have colonised the region with fairly even intensity. Three towns have shops which are considerably larger than average. Welwyn Garden City (£22,542), with its Department Store, over twice the size, in sales area, of the largest store in Guildford, has the largest average size of shop in Great Britain, except for certain of the London Boroughs. Guildford (£14,881) has great regional significance in Surrey, as well as a resident population with high purchasing power. Letchworth, the other, to Welwyn Garden City, pre-war new town, reflects its planned character with shops which have an average size of £14,053.

Regional significance in the Home Counties is usually evidenced by a large size of shop. Towns which have shops with an average size over £11,250 are:-

Romford, Colchester, Maidstone, Dartford, Chelmsford, Canterbury, St. Albans, Watford, Eastbourne, Chichester, Sevenoaks.

Oxford's shops have an average size of £16,082, which makes them far larger than those in any other town in the South. This is the result of an unusual combination of regional functions and special functions as University city. It must also owe something to a particular high density of shopping, the result of the presence of 23,000 people living in suburban villages in its immediate hinterland.[17] Cambridge, in contrast, has an average size of shop of £13,820. Other towns in the South with over £11,000, as their average size of shop, are Bournemouth, Slough, Aldershot, Winchester, Dorchester, Andover and Sherborne, all of which clearly have special shopping functions. In general however shops in the region do not differ so greatly in size as in some other regions. The village store generally has far higher turnovers than the parlour or corner shops of industrial settlements.

In the West, apart from Bristol and Plymouth, both of which were still suffering from war damage in 1950, the largest shops are found in the largest towns. There are Salisbury (£12,020) Truro (£12,240), Chelteham (£12,598), Gloucester (£12,656), Yeovil (£13,216) and Taunton (£13,449). Exeter has rather smaller shops £11,710, as has Bath (£10,512). Small towns with large shops are generally

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17. Freeman op. cit. p. 274.

fairly important as regional centres: Launceston (£10,067),. Stroud (£10, 485), Newton Abbot (£10,540), Cirencester (£10,604) and Trowbridge (£10,744).

In the East Anglia and Welsh Marches areas three towns have by far the largest shops. These towns are the County Towns of the Marcher Counties, Worcester, Shrewsbury and Hereford all of which have shops with an average size of over £12,500. Towns found with shops of average size between £10,400 and £11,750 are of two types. There are first the regional centres of East Anglia, like Norwich, Ipswich, Cambridge, Bedford and Bury St. Edmunds. Second, are smaller towns, more heterogeneous in character but some of which are of "the city" category referred to above. They are East Dereham, Stowmarket, Huntingdon, Woodbridge and Evesham. One place with an exceptionally large size of shop is Diss (£12,682), the special importance to which of military bases has been noted.

In Wales there are two distinct economic landscapes. The southern coalfield and the remainder. In the former there is a general direct relationship between the size of shop and the size of town, culminating in Cardiff (£10,148). In this area there is an interesting contrast between Newport (£19,146) and Swansea (£7,748). The 1961 Census will make interesting comparison with these 1950 figures, to see what effect rebuilding schemes will have had in the case of Swansea. The second economic area in Wales is characterised by fairly distinct contrasts in the size of a town's shops, which may be related to differences in urban rank (see p. 133). Towns with shops which have an average size over £9,000 are LLandudno, Wrexham, Colwyn Bay, Rhyl, Bangor, Carmarthen and Tenby. The only exception to this division is Bridgend (£9,644) which has a far larger size of shop than any similar sized settlement in South Wales.

The relation between size of establishment and the size of town in Scotland gives further support to the thesis that trading conditions there are rather different to those elsewhere. Figure 3E shows that almost every large town has relatively large shops, all with a population of over 30,000 averaging over £8,945. These towns may in fact be grouped into three types:-

£8,945 - £9,825		£10,660 - £11,500	over £12,000	
Coatbridge	Airdrie	Hamilton	Ayr	Dunfermline
Kirkcaldy	Motherwell	Glasgow	Perth	Aberdeen
Greenock		Clydebank	Kilmarnock	Falkirk
Dundee		Edinburgh		
		Paisley		

These types correspond fairly well to regional significance, except in the cases of Edinburgh, Glasgow and Dundee, which have the smaller size of shop which is expected in the largest cities. The largest shops of all are found in Fort William (£15,028), Turriff (£15,147) and Inverness (£15,355), places whose isolation results in regional significance comparable to the English County Towns. Dumfries, Kirkwall, Castle Douglas, Lockerbie and Elgin have slightly smaller shops but in each case the average is over £10,000.

Wages as a Proportion of Turnover[18]

The Census tables of wages and salaries are useful in an analysis of the geography of retailing, for they give some indication of the types of trade and of the type of trader found in many settlements. The tables include all wages paid by retailers to ~~both~~ all employees, both part-time and full-time, but do not include the drawings of proprietors. They apply to the week ending 24th June, 1950, and so do not reflect an annual wage bill in all areas equally. There is some evidence provided (the Employment Factor) which makes it possible to distinguish towns which have either a particularly large or low bill that week. Those with large wage bills are mainly resorts. In St. Ives, Sandown, Filey and Rhyl the wage bill is approximately 20% more than annual average weekly wage bill. In all other cases it was lower than this.

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18. This has been selected in preference to the number of employees per establishment. Figure 3H shows both for Scotland. The advantages of wages as an index of one aspect of size, rather than the number of employees are slight, but are real since they are a direct measure of costs rather than an indirect one.

Table 3G Percentage of Turnover paid as wages by Trade type.

Retail Trades 8.0%

Grocery	5.8%	Clothing	8.4%	Chemist	11.9%
Other Food	9.0%	Hardware	9.6%	Furniture	8.9%
Confectioners	3.3%	Books	11.6%	Jewellery	10.0%
		General	10.4%		
		Coal	9.3%		
		Other Food	12.6%		

Service Trades

Catering	21.8%	Funeral Furnishers	19.0%
Hairdressing	26.5%	Portrait Photographers	14.6%
		Repairers	18.6%
		Motor Vehicles	6.3%
		Motor Repairers	11.6%

Table 3G shows that any variations in the figure for a town must, to some extent at least, be due to proportion of sales accounted for by particular trades. In general it may be noted that the retail trades with the highest rates are those which are most concentrated. Other things being equal therefore a high figure for a town indicates the importance of central functions.

The organisational structure of trading further influences the figure for working proprietors do not figure as a labour cost, so in those areas where independent trading is strong the index will be low. Wage agreements between shop workers and multiple organisations result in differential wage rates for workers in multiple, independent and co-operative organisations.

The labour productivity of retailing is a factor of considerable importance. It is however impossible to show whether this has any geographical variations. It is clear that some types of organisation achieve far higher turnovers per employee than others. The spread of self-service trading in particular will introduce variations of this type. Fortunately, for this analysis, self-service techniques were poorly developed in 1950, and so will not unduly influence the Census statistics.

At a regional level trends similar to those described in Chapter one exist. Northern and Southern England are easily distinguishable as two separate economic landscapes. The two 'northern' regions with the highest figures are Scotland and the North itself. London has the highest figure of all, and Wales the lowest.

Table 3H Retail Trades Wages as Percentage of Turnover

N	7.5	E	8.0	S	8.5	NW	7.4
Y	7.2	L	8.8	SW	8.4	Wales	6.9
NM	7.3	SE	8.4	M	7.2	Scot.	7.8

Within regions some considerable contrasts may be observed, since regional variations are so great these have been plotted using the quartile ranges of the dispersion of values in each region (figure 36). Certain common trends may be noted in all areas.

Holiday resorts generally have high values. This is the result of the week during which the Census was taken. The values are, however, even higher than could be accounted for by this factor alone. In fact the type of trade found in holiday resorts is particularly labour intensive.

Regional centres of the County Town type and important market towns also have high values. The composition of trades found in these towns accounts for a high proportion of this. A further factor is the size of shop usually found in towns of this type. The largest shops have high wages, for not only is the labour of working proprietors proportionately less significant in the total, but these shops conduct many of the activities carried out by wholesalers for smaller shops.

Low values are usually characteristic of large towns, for although the large shops of these towns do have high wage bills, some shops, particularly food stores are able to use labour more intensively in the larger markets found in these towns. In addition service industries of the type included in the Census are proportionately less significant in these towns, these trades have particularly high percentages of turnover paid as wages.

In South and the South West, as shown in figure 3G, the resorts of Devon and Somerset have particularly high values of the ratio. Some, however, are exceptions to this:

Northam (7.9%), Brixham (7.7%), Dawlish (7.7%), Budleigh Salterton (7.4%) and Watchet (6.4%). None of these are recorded by Green or Carruthers as motor-bus centres, something which is clearly reflected in these figures, for despite their holiday functions they must supply few central demands. There is a contrast between the Devon and Cornish resorts which can be explained in a similar way. This contrast is, however, a reflection of the poor penetration of multiple organisations into Cornwall. Another feature of significance in this region is the greater importance of wages in the vicinity of London. This is particularly true of the towns of the Thames Valley. This is probably the result of multiple organisations found particularly in the region. It is also a reflection of the higher labour costs of the London area. Towns like Taunton, Bath, Oxford, Winchester, Aldershot, Salisbury, Newbury, Bridgwater and Exeter all have values above the median, showing the significance of central functions as an explanation of high values of this index.

In the East and the North Midlands, corresponding to the greater general contrasts between towns, some more clear-cut patterns can be distinguished. In East Anglia twenty-three out of twenty-eight towns are found with values above the median, and seventeen of these are in the upper quartile. In contrast to this uniformity the pattern in the North Midlands is far more varied. The predominant pattern there is one with high values in the more significant centres and low values in the suburban areas. Some of the values of urban areas are shown below:-

Nottingham	8.6%	West Brignorth	8.2%	Hucknall	7.2%
		Beeston	7.9%	Carlton	7.2%
				Arnold	6.8%
Northampton	8.6%	Burton Latimer	4.3%	Higham Ferrers	6.0%
Kettering	8.6%	Rounds	5.5%	Desborough	6.1%
Wellingborough	8.7%	Irthlingborough	6.0%	Rothwell	6.4%
				Rushden	8.0%

The contrast between a market town pattern and the industrial pattern is equally clear in the Northern Region. Market towns in the region all have values of about the average, except Cockermouth, Barnard Castle and Amble. These towns show evidence of their isolation, and hence their low proportion of large retailers by having low values of this index. In the industrial part of the region the major centres mainly have high values of this index. In County Durham for instance the following towns have values above the median: Darlington, Stockton, Hartlepool, Spennymoor, Durham, Chester-le-Street and Sunderland. This is however not a completely exclusive list of such centres. Bishop Auckland, for instance, has a figure below the median.

In Wales this sort of contrast is again apparent. In the South Wales coalfield only Ebbw Vale and Pontypool have values above the median, whereas the resorts of the North Wales coast and the market centres of the Marches all have high values. Market towns in other parts of Wales have relatively low figures for multiple trading is poorly developed in these areas, wage bills are low, since they are far from the major conurbations.

In Scotland the pattern is far less simple (figure 3H). It can be compared in this case with another measure of scale in retailing - wages per establishment.[19] Differences between the two measures are not great, although some may be noted. There is a slight tendency for high wages per establishment to be concentrated in the Central Lowlands, since multiple and co-operative organisations are concentrated there. In contrast high wages as a percentage of turnover are recorded in the Moray Firth towns, which probably have a large proportion of service trades for holiday markets, but which also may use labour less intensively than elsewhere.

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19. Fleming op. cit.

Towns with a Population Over 25,000.

Although these towns are the subject of chapter four the relationship between sales and wages in certain trades can be most conveniently considered here. Figures 3.I. and 3.J. show this relationship for two trades: the Grocery Trade and the Clothing Trade.

In the Grocery Trade the towns which have below mean values are found particularly in rural areas, and the working class residential areas of the conurbations. High values are found in South-East England, on Merseyside, and to a lesser extent in the North East — all areas which have special concentrations of multiple traders.

In the Clothing Trade high values are found in the more important shopping centres, and in Southern England. Low values are recorded especially in Lancashire and the West Midlands. This distribution also accords well with the distribution of multiple traders. It is noticeable however that there are far fewer towns which accord values of more than two standard deviations in this trade than in the Grocery Trade.

The Urban Hierarchy

The various statistics which have been examined in this chapter can, in conclusion, throw considerable light on the distribution of the various elements of the retail pattern of towns in Great Britain. Some of these elements have been used by various workers in studies of the urban hierarchy. Other studies have used indirect measures to examine this hierarchy which show these main elements. The use of the Census for this task is to be justified on two counts: first it is the only source of quantitative data for the whole country, and second the variations which successive Censuses will show will allow a study of change in the rank of towns to be undertaken. This is not the only, or indeed the most important, reason for a geographical examination of the Census but is a fairly significant one in view of the existing work on the geography of towns. A few comparisons with these existing studies will therefore be of interest.

(1) Wales

Studies of the urban hierarchy in Wales include those of Smailes[20] and Carruthers.[21] Carter[22] has made a

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20. Smailes (1944)
21. Carruthers (1957)
22. Carter, Urban Grades in South West Wales, Scottish Geographical Magazine, 1955 April.
and The Urban Hierarchy and Historical Geography: A Consideration with reference to North-East Wales. Geographical Studies Vol. 3, No. 2, 1956.

number of significant studies of specific areas in the region. Figure 3F shows the results achieved by Smailes and Carruthers. They are reasonably comparable, save that Smailes found a number of places ranking as towns in the South Wales Coalfield which Carruthers did not rank as motor bus centres. The map of sales per establishment shows a remarkable correlation with both these systems, and particularly with Carruthers'. The deviants which are especially significant are some of the resorts of the north coast, particularly Llandudno and Tenby, which have larger shops than might have been expected, and the small size of shops in some towns in Western Wales. Aberystwyth for instance, although clearly an important centre, only has an average size of shop of £8,987.

Carter's detailed study of North-East Wales shows that a more refined examination of the urban hierarchy gives a very close correlation with the Census. Table 3I compares his grading with Census figures. It will be

Table 3I North East Wales

Town		Carter's Classification	£ S/E	£ S/H
Wrexham		Major Town	10,632	219
Rhyl	A	Fully Fledged Towns	9,446	223
Denbigh	A	Fully Fledged Towns	7,477	123
Holywell	B	Fully Fledged Towns	7,072	111
Mold	B	Fully Fledged Towns	5,520	167
Ruthin		Sub Towns	6,380	172
Prestatyn		Sub Towns	6,926	121
Llangollen		Sub Towns	6,044	173
Abergele		Sub Towns	5,796	97
Flint		Sub Towns	5,500	77

seen that only Mold is anomalous in respect to size of shop. Sales per head figures in contrast are very variable. Mold was found by Carter to have "a degree of incoherence in its internal structure", so it might have been expected to have a low average size of shop.

Table 3J shows Carter's results for South West Wales compared with the Census figures. The correlation

Table 3J South West Wales

Town	Carter's Classification	£ S/E	£ S/H
Tenby		9,371	271
Carmarthen	Grade 1	9,158	238
Haverfordwest		8,390	227
Llanelly		7,477	166
Milford Haven		7,297	108
Cardigan		7,042	191
Lampeter		6,134	166
Ammanford	Grade 2	6,134	173
Pembroke		5,264	113
Fishguard		4,071	106

in this case is complete in the case of sales per establishment, although there is not much difference between Llanelly, a grade one centre, and Milford Haven, a grade two centre.

(2) Southern England

The studies of H.E. Bracey[23] of the pattern of service centres in Southern England have effectively isolated the rural component of a town's significance as a place of

23 H.E. Bracey, "A Rural Component of Centrality, Applied to Six Southern Counties of the United Kingdom", Economic Geography, 32 (1956) pp. 38-50.

service industry. Figure 3A shows a comparison of towns in four counties, which have similar economic landscapes, ranked by Bracey's Centrality Index and by their average size of shop or sales per head. The former is shown to correspond rather more closely than the latter to Bracey's index. However an examination of size of town shows that the sales per head relationship really includes two different types. Large towns are relatively less significant in terms of sales than in centrality and, what is of particular significance, this is at a fairly regular rate, especially in the case of the largest towns. The correspondence of the Census figures and Bracey's findings is important for it means that it may well be possible to use such figures in an examination of change in the hierarchy when another Census is available.

CHAPTER FOUR

URBAN AREAS POPULATION OVER 25,000.

The concentration of service trades in large towns varies from trade to trade, but almost all are to some degree so concentrated. In the retail trades table 4A shows that all but the smaller general stores are more frequent in towns of this size than in the country as a whole. In terms of sales the concentration is less in some trades but more marked in others, like clothing, furniture and jewellery. Greater London, as the major urban area of Great Britain, shows somewhat similar tendencies although, as section one has shown, certain regional rather than urban characteristics account for important parts of its trading pattern. These explain its low percentages in the grocery trade and relatively high ones in the other food trades. It is significant however, that London has particularly high concentrations of distinctly urban trades, like large general stores, bookshops and jewellers. Also shown in table 4A are concentration figures for the seven County Towns. These have very high proportions of sales of shops like jewellers and clothing, and in only two trades, other food and bookselling, is the concentration of sales in these towns less than in London.

TABLE 4A CONCENTRATION OF RETAIL TRADES IN URBAN AREAS

Trade	Urban areas sales %	Index[3]	% Shops	Greater London sales %	Index	% Shops	County Towns[1] sales %	Index	% Shops
Grocery	49.6	1.03	53.1	14.0	0.81	9.7	0.92	1.30	0.79
Other food	53.3	1.11	54.5	22.3	1.29	15.6	0.91	1.29	0.83
Confectioners	52.1	1.08	52.9	26.2	1.51	17.8	0.93	1.31	0.74
Clothing	68.5	1.42	56.2	21.2	1.23	15.4	1.52	2.15	0.94
Hardware	49.7	1.03	50.4	19.7	1.14	16.7	0.93	1.31	0.68
Booksellers	48.6	1.01	59.3	29.6	1.71	19.0	1.16	1.64	0.98
Chemists	54.5	1.13	53.3	20.7	1.20	18.7	1.34	1.89	0.91
Furniture	63.7	1.32	57.9	22.6	1.31	19.5	1.37	1.94	1.21
Jewellery	60.3	1.25	55.5	26.0	1.50	17.4	1.62	2.23	1.20
General A[2]	31.6	0.66	33.3	16.4	0.95	13.2			
General B	57.1	1.19	61.6	30.3	1.75	22.3			
All Trades	55.2	1.15	54.0	21.0	1.21	14.7	1.20	1.69	0.84
% Population		48.1			17.3			0.71	

1. County Towns are Carlisle, Lincoln, Worcester, Shrewsbury Salisbury, Taunton, Hereford.

2. General A are general stores with sales under £50,000
   General B are general stores with sales over £50,000

3. Concentration Index $= \dfrac{\text{\% of sales in particular trade}}{\text{\% of population}}$

A detailed examination of the trading pattern of large towns, which is so clearly desirable from this account of their special significance, is possible as a result of the trade breakdown of the census. Certain special difficulties are however present in such an analysis. Burns[1] has expressed these clearly when he wrote that analysis of the census is "a hazardous game, and the more diverse the unit the more hazardous does it become." The major problem is that in some trades in all towns, and in most trades in some towns, the number of trading units is small and so any minor variations in the classification of these units will weigh heavy in the final analysis. Some examples of the sort of problem which is presented to the analyst should clarify this.

In the bookselling trade table 4B sets out a typical example. Difficulties of classification have in this case

TABLE 4B SALES OF BOOKSELLERS

	Aberdeen	Southampton	Dundee
Population ('000)	188	181	178
Booksellers sales (£'000)	600	307	253
Newsagents sales (£'000)	226	469	1043
Combined sales (£'000)	826	776	1296
% of Confectionery Group Sales by Newsagents	11.6	24.0	53.6

probably resulted in some outlets recorded as booksellers in Aberdeen being classified as newsagents in Dundee. The outlet structure for goods normally sold in booksellers

1. W. Burns The Surveyor 13th August 1955 P. 797

may be different in Dundee for it would seem unlikely that there should be such contrasts between these towns. The high proportion of the confectionery trade taken by newsagents in Dundee suggests that there is some evidence for this.

It is usually not possible to demonstrate so clearly the existence of "cross-trading", as the sale of most commodities may take place in shops classified in one of several different census groups. This is especially true of those commodities which figure significantly in the trade of Departmental stores. Two trades dealing in such commodities are furnishers and jewellers, the trading pattern of which is set out in table 4C for a series of medium sized towns. The sales of these trades vary considerably from town to town, and for a particular town from trade to trade. Only Bedford, with the highest sales, and Scunthorpe, Nuneaton, and Crewe, with the lowest sales, are clearly distinguished in both trades. Great Yarmouth may be distinguished by its very low sales of furniture, something partly compensated for by very high sales of "jewellery". In contrast to the sales pattern the average size of establishment of the two trades varies considerably less from town to town. It is therefore more easily possible to construct an adequate ranking table from these figures. This ranking order does in fact correspond fairly closely with most subjective

TABLE 4C SOME TOWNS WITH POPULATION BETWEEN 50,000 and 55,000

	Retail Sales £'000					Sales Per Establishment £'s				
	Furniture		Jewellery		Average	Furniture		Jewellery		Average
	sales	rank	sales	rank	rank	sales	rank	sales	rank	rank
Maidstone	541	7	185	2	4.5	18,033	3	7,708	3	3
Peterborough	561	5	183	3	4	16,500	4	5,382	4	4
Scunthorpe	450	8	71	9	8.5	13,636	8	3,550	10	9
Nuneaton	434	9	103	8	8.5	13,952	7	3,850	9	8
Bedford	685	1	145	4	2.5	25,370	1	9,047	2	1.5
Crewe	557	6	69	10	8	15,914	5	4,313	6	5.5
Dewsbury	577	4	133	5	4.5	14,795	6	4,156	8	7
Lancaster	578	3	122	6	4.5	19,261	2	10,167	1	1.5
Great Yarmouth	170	10	236	1	5.5	10,625	10	5,244	5	7.5
Mansfield	593	2	114	7	4.5	12,891	9	4,222	7	8

rankings of these towns.

This conclusion, regarding ranking, can be further examined in table 4D, which shows a number of smaller towns and two trades which are not so comparable as measures of centrality, but which do have a certain amount of cross-trading between them. Correlation is not so great in either sales or size of establishment. There is however, a great correspondence between the two average rank lists. In both lists five towns, Inverness, Boston, Stirling, Canterbury and Dumfries stand as especially significant, as indeed they do in the urban hierarchy. The towns with relatively low sales of furniture in relation to hardware are Wellingborough, Winchester and Maidenhead. They are a descrete group of important centres for local trade, of higher rank than ordinary towns, but since they are relatively close to major towns like Northampton, Southampton and Reading, lose much of their speciality trade to these towns.

Whilst the average size of shop is the best single expression of a town's regional significance, a grouping of sales figures may be used with some confidence for such grouping reduces the effects of cross-trading to a minimum. The best grouping would seem to be the Food Trades, containing the grocery and other food groups, and Shopping Goods, containing the clothing, furniture and

TABLE 4D SOME TOWNS WITH POPULATION BETWEEN 25,000 and 30,000.

	Sales £'000					Sales Per Establishment £'s				
	Hardware		Furniture			Hardware		Furniture		
	Sales	Rank	Sales	Rank	Average Rank	Sales	Rank	Sales	Rank	Average Rank
Ashington	106	15	364	4	9.5	5,047	16	36,400	1	8.5
Workington	128	14	265	8	11	5,333	15	16,063	7	11
Inverness	325	1	290	6	3.5	19,118	2	32,222	2	2
Wellingborough	216	4	235	10	7	7,448	10	10,217	13	11.5
Stirling	163	10	413	3	6.5	8,167	9	27,533	3	6
Winchester	180	7	110	14	10.5	10,588	4	6,471	16	10
Abertillery	54	16	60	16	16	5,400	14	12,000	10	12
Maidenhead	248	3	113	13	8	20,667	1	7,533	15	8
Canterbury	195	6	518	1	3.5	9,143	7	17,862	5	6
Dumfries	307	2	190	11	6.5	15,350	3	13,572	9	6
Bexhill	155	12	279	7	9.5	5,938	12	11,641	12	12
King's Lynn	172	9	348	5	7	5,548	13	18,316	4	8.5
Coalville	158	11	83	15	8	9,294	6	11,914	11	8.5
Paignton	177	8	123	12	10	8,850	8	8,200	14	11
Bognor Regis	149	13	238	9	11	6,208	11	15,866	8	9.5
Boston	197	5	456	2	3.5	9,400	5	16,300	6	5.5

jewellery groups. An analysis of sales figures of these two groups is shown in figure 3A for Rural Counties (see appendix A). In the Food Trades inter-urban variations are very small in sales per head. In the Shopping Goods trades on the other hand values grade from £70 per head to £10 per head. In neither case is there any apparent direct relationship between the size of towns and per capita sales. Indeed the largest towns of all have lower per capita sales of shopping goods than many other towns, something which is only partially the result of the special importance of department stores, not included in the group of trades, in these towns.

Ranking high in sales of foodstuffs are two types of town, resorts and regional centres. While places with low values are of mixed character, but are predominantly suburban. Examples of the towns so classified are:-

Resorts		Regional Centres		Suburbs	
Bournemouth	Torquay	Oxford	Worcester	Gosport	Farnborough
Eastbourne	Worthing	Hereford	Bedford	Eastleigh	Fareham
Bognor	Bexhill	Taunton	Peterborough	Camborne	

In general however, it should be noted that variations are small.

The pattern of sales per head differs in the Shopping Goods trades for more descrete grouping exists. Towns with a population under 50,000 fall into two such groups. County Towns like Taunton, Salisbury, Hereford, Shrewsbury, King's Lynn and Boston, and resort Torquay, have sales over £55 per head. The remaining towns have sales of under £45 per head, and are places like Kidderminster, Weymouth, Lowestoft, Aldershot and Bognor Regis. Larger towns with a population over 50,000 show a less clear-cut pattern, although there is some tendency for more important centres to have high sales. County Towns like Bedford, Worcester, Peterborough and Norwich have sales over £49 per head, but others like Gloucester, Lincoln and Carlisle have far lower sales. A group of towns which have uniformly high sales are the resorts and spas like Bath, Cheltenham, Worthing, Brighton and Bournemouth.

An interesting application of the figures for individual trades has been made by Odell [2], who estimated the total population served by a particular trade type by dividing the town's sales by the national average expenditure. This forms a most illustrative exercise, although it is perhaps better to use a regional average than the national average. Table 4E shows the calculations for Coalville, which was classified by Carruthers as a 4A centre. The figures show that the town attracted some additional population for hardware sales, whilst "losing" much of the custom of its own inhabitants for jewellery and furniture, a fact which clearly corresponds to the nature of fourth

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2 P.R. Odell, The Hinterlands of Melton Mowbray and Coalville, Trans. and Papers, Inst. of British Geog. No.23 1957,pp175-90

Table 4.E. Coalville : Retail Trade 1950

	Total Sales (£'000)	Population Served Estimate based on: National Average	North Midland
Hardware	158	35,909	33,617
Boots & Shoes	64	23,704	25,600
Chemists	73	22,813	24,333
Furniture	83	16,939	14,821
Jewellery	21	13,124	14,000

Population of the town in 1950 was 25,720.

order centres. Similar calculations could be made for every town for which the census provides a trade breakdown, it is however, sufficient here to demonstrate the importance of such an approach.

THE SIZE OF SHOPS

The average sales per establishment is one of the most significant of the statistics which can be derived from the census. In chapter three it was possible to show conclusively that large shops are found in those towns which, for their size, are important shopping centres. It was not possible to show there whether this is the result of the types of trades found in these centres, or whether it is the result of a more effective exploitation of any economics of size of shops there. These problems can now be given some attention for the larger towns.

These problems have been examined in general by Hall[3], who analysed in particular the grocery and clothing trades. Hall found that grocery shops in Britain, in contrast to North America, varied in size almost entirely in relation to the occurance of those organisations which have large shops. There is however a tendency for all establishments to be largest in the medium sized towns, something which is especially true of multiple shops. Co-operative shops increase in size with each town-size group. Independent shops are largest in the medium sized towns. In the clothing

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3 Hall et al (1961).

trade on the other hand increases were found to occur with town size, until the largest (or next to largest) town size, but "a very curious and striking feature of the trade in all three countries is that the average size of shop, taking the regions as a whole falls with rising per capita income."[4]

It is not the purpose of this account to take issue with these points, for Hall was mainly concerned with international comparisons, and in almost all cases Great Britain seems to weigh light in her argument. Indeed in most cases her general description of trading conditions corresponds rather poorly with actual conditions in regions and towns of Great Britain. This is partly a result of shortcomings of the statistical data on which it was based. Town-size groups are not a good measure of urban functions, especially in regional groupings like the British standard regions. "The striking and curious feature" of the clothing trade can almost completely be explained by this one fact. For instance, the region with the highest per capita income in Great Britain is London and the South East, in which the two towns with over 250,000people are Croydon and Wandsworth. The major shopping centre of the West End is found in the boroughs of Kensington, Westminster and St. Marylebone which have populations ranging from 78,260 to 177,400. Rank and size show little relation.

Another example of the dangers inherent in this approach

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4 Hall et al (1961). P.114.

can be found in a general statement, presumably meant to apply to Great Britain as well as the U.S.A. and Canada, that "in the food trade there appears to be an optimun average size of shop, which is reached well before the largest and wealthiest towns in our ranking." [5] Detailed examinations of the largest and wealthiest towns which follow show that this cannot be supported by the actual facts, indeed some large towns like Edinburgh, Glasgow and Newcastle have figures far higher than the majority of smaller towns. The concept of an average size shop is so involved, is dependent on so many variables that detailed examinations are absolutely necessary before any satisfactory account of variations can be advanced.

All studies of retailing using census data have to be aware that for the most part figures derived from them are arithmetric means; there is no indication of the dispersal of values, for instance in the sizes of shop in any town. Only at regional level is such information available. The dispersal of values is of such importance that every attempt should be made to find some method, however indirect, of achieving some frequency distribution so that the factors which determine it may be more clearly distinguished. Figures 4A and B show two such distributions. Figure 4A shows the size of shops in local authority areas, as the basic unit for each trade, expressed as percentages in

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5 Hall et al (1961) P.114.

each size group. Figure 4B shows these areas in absolute terms ranged against Moser and Scott's [6] component-analysis classification of towns. Both show very great variations in almost every trade, for the average size of shop is no simple quotient. The variations are greatest in shopping goods trades, particularly in furniture, women's wear, men's and women's wear, and are least in the convenience trades. This contrast is a direct reflection of variations in urban rank.

Further examination of the frequency distribution here takes two forms: first, attention will be given to the overall characteristics of each trade: and second, each trade will be examined in terms of those towns which have the highest average figures.

General Variations in Size

In the grocery trade there is a dispersion of values broadly similar to the retail trades as a whole. There is little variation between town sizes, particularly if it is remembered that there are few towns in the largest size group. Town-types are however, arranged most significantly. In this trade the thirteen types (see Appendix A) may be re-grouped into three. First, groups 9-12 (the suburban groups, but including such towns as Luton and Slough in group 12) all have values considerably in excess of the mean; second, groups 1-3 (the resorts, the "professional" centres, and the commercial centres) and group 13 (the

6 Moser and Scott, British Towns, a statistical study of their social and economic differences. London 1961

MOSER & SCOTT's TOWN GROUPS (See Appendix A).

Mainly Resorts, Administrative and Commercial Towns.

Group 1 (mainly SEASIDE resorts).

Group 2 (mainly SPAS, PROFESSIONAL AND ADMIN. centres).

Group 3 (mainly COMMERCIAL centres).

Mainly Industrial Towns.

Group 4 (including most of the traditional RAILWAY centres).

Group 5 (including many of the LARGE PORTS).

Group 6 (mainly TEXTILE centres).

Group 7 (industrial towns of NORTH-EAST SEABOARD and MINING TOWNS of SOUTH WALES).

Group 8 (including the more recent METAL MANUFACTURING towns).

Suburbs and Suburban Type Towns.

Group 9 (mainly "EXCLUSIVE" RESIDENTIAL suburbs).

Group 10 (mainly OLDER MIXED RESIDENTIAL suburbs).

Group 11 (mainly NEWER MIXED RESIDENTIAL suburbs).

Group 12 (including LIGHT INDUSTRIAL suburbs etc.).

Group 13 (mainly OLDER WORKING-CLASS and INDUSTRIAL suburbs).

older industrial suburbs) all have values slightly above the mean; and third, the remaining four groups (the industrial towns) have values below the mean. The first of these groupings has high values because towns in it have relatively few grocers shops, a relatively high ratio of multiple to other types of trader and particularly few parlour shops. These characteristics are the result of the age of development of these towns, for much of it was during the period when multiple organisations were particularly actively growing. Jefferys[7] has estimated that, during the period 1926-1930, 906 new multiple branch shops were set up, a figure which is over twice that recorded for any other similar period. The second grouping has rather a greater cross section of types of grocery shop, including numbers of both very small and very large ones, the former depressing the average, while the latter exemplify the central significance of the town in which they are found. In some of the towns included in this group conditions are particularly attractive to independent traders both commercially and residentially. However if the town is too small in extent (i.e. if a very high proportion of internal trade as well as regional trade is concentrated in a major shopping area) commercial opportunities will be poor for the small independent trader. A certain minimum size of town is necessary for conditions to be favourable in this way. In the case of the County

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7 Jefferys (1954)

Towns this point is illustrated by a far larger size of shop in Hereford than in the others:-

Carlisle £10,146	Worcester £10,000	Salisbury £10,843
Lincoln £7,839	Shrewsbury £10,218	Taunton £16,538
		Hereford £16,689

In the third grouping this "supply factor" of shopkeepers is of key importance for in the industrial towns entry into the trade is particularly easy in their extensive terrace-housing areas. Furthermore alternative possibilities of wage-earning have at various times been very poor. The difference between these towns and the towns of groups 1-3 is in large part a reflection of the relative significance of the central shopping areas. In regional centres more trade is concentrated in central shopping streets, as a result of the custom of the hinterland population.

The butchery trade is more homogeneous than grocery, and in consequence there are fewer variations between towns, those variations which do exist however, are very much of the same pattern as in the grocery trade. The suburban town types all have very high values, the resorts and professional centres have high values, and the remaining town types, including, as was not the case in grocery, the commercial centres have low values. The only likely reason for this minor difference is that since multiple trading, with its concomitant demands for a large "threshold" size of shop is not so well developed in this trade as in the grocery trade, few organisations are in existence whose main function is to exploit any economics of scale in the actual retailing of meat, which are usually found particularly in these commercial centres.

Variations in the size of fishmongers shops are no greater than in either of the two preceding groups. There is however, some tendency for the smallest towns to have more high values than the remainder, but it cannot be said that this is great. In terms of town type the variations observed for other trades exist, but each group of towns is far less homogeneous. This is mainly, although not entirely, the result of regional differences. Thus, inland towns, which have high values, such as Birmingham (£13,620), Leeds (£13,539), West Bromwich (£10,300) and Dudley (£11,000), are clearly a group in themselves in this trade. "Supply" factors must largely account for this, since the organisation necessary to successfully operate a fish shop in these towns, far from the ports, is much greater than in a town nearer to the ports. In fact fishing ports have rather small fishmongers shops (Grimsby £5,680, Hull £4,897 and Fleetwood £3,222), so adding force to this argument.

The average size of greengrocers' shops varies very little. There is no discernible relationship with town size, and even town types show little variation, although there is some evidence of the general trend of food shops. This applies particularly to exclusive residential suburbs, probably reflecting a high individual demand for this type of commodity. Group 3, the commercial centres, has particularly low figures, and is rather more homogeneous than many of the others. This is probably the result of a "supply" factor, for entry into this trade is particularly attractive in towns situated near important fruit and vegetable growing areas. Towns such as Norwich, Lincoln, Peterborough and Worcester all show evidence of this.

The bakers trade is far less homogeneous than any of the other food trades, and whilst this can be expected to some extent, it is in the main a further reflection of the unsatisfactory nature of the classification here. This lack of homogeneity applies equally to all sizes and types of town.

The confectionery trade varies in almost entirely the same way as the food trades as a whole.

Hardware and chemists shops, intermediary in character between convenience and shopping trades, have some of the characteristics of both. Hardware shops group town-types in much the same way as food shops. High values are found in towns with important central functions and in suburban areas, but not, it is interesting to note, in the resorts. Chemists shops are rather more similar to shopping goods trades than this. Suburban groups have only average values, while groups 2,3 and 4 have higher than average values. This indicates the marked similarities of some chemists shops, particularly of the major multiples, to minor department stores.

Booksellers and jewellers show clearly the typical characteristics of shopping goods trades. In general the size of each increases with the size of town, a fairly typical characteristic. Town-types are however not so clearly differentiated as in other shopping trades, but the importance of groups 2 and 3 is clear. The main reason for this lack of differentiation would seem to be that, exceptionally, in this case size of town is more important than function in determining size of shop.

Furnishing stores, partly as one of the groups which present special difficulties of classification, and partly as one in which differences of urban rank are important, vary considerably in average size. Just as in the case of the two previous types of shop there is a tendency for the largest towns to have the largest average size of shop. In this trade however, town types can also be differentiated. Groups 2 to 8, and 13, have higher than average values, for they contain those towns which have important central functions and those in which the ratio of multiples to independents is high. Furniture multiples are strongly orientated on industrial working class markets. The resorts, group 1, and the suburbs have low values.

In the clothing trades Hall noted a tendency for the largest shops to be found in medium sized towns. Figure 4A shows that this is only the result of the use of regional arithmetic means, for the frequency distribution presents no differences between towns of 100,000 people and towns of

250,000, both of which can be seen to be generally larger than the smaller towns. The town types which have high values are groups 1 to 3, and group 5, which contains regional capitals like Birmingham, Newcastle, Liverpool, Swansea and Hull. Another group with high values is the "older mixed residential suburbs" group, which contains places like Croydon, Ilford, Hendon, Wood Green and Wimbledon, all of which have a class A shopping centre according to Smailes and Hartley.[8]

The two clothing sub groups which show least differentiation are boots and shoes and men's wear. The shops of these trades do show some tendency to be larger in the large towns but they vary little from one town type to another. This characteristic can be explained by the importance of large multiple organisations in the trades, which have near national distributions of their branch shops.

The men's and women's wear, and the women's wear sub groups are both greatly differentiated. In both, size of shop and size of town is related, but even more variation exists between town-types. These variations are in complete accord with the overall variations of the clothing trade.

To generalise this account of variations in the size of shop with town size and town type it will be seen that four groups of town emerge, each of which is differentiated by a

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8 <u>Smailes and Hartley (1961).</u>

particular combination of large shops. This grouping is set out below:-

	Food Trades	Frequent Demands	Shopping Goods
Suburbs	*		
Centres	*	*	*
Resorts	*		*
Industrial towns			+

* Indicates larger shops than average in all trades.

\+ " " " " " in some " .

<u>The Highest Average Figures</u>.

A second way of examining the average size of shops is to examine the towns which have the highest figures regardless of size or town-type. This has the advantage that it is possible to consider all types of town with population over 25,000, whereas Moser and Scott's town-types were only of towns over 50,000. The towns with the highest values in each trade are listed at the end of this chapter.

Towns with particularly large grocers shops are shown in figure 4C, and are to be differentiated either by the type of organisations found in them or by function. Concentrations in Central Scotland and North-East England show the combined effect of multiple and co-operative organisations on size, while those in the Home Counties and on the South Coast are a reflection of a larger sized shop of all organisations. The towns outside these areas with high values are regional centres like Hereford, Taunton, Aberdeen, Inverness and Dumfries.

High average values of sales per fish shop are found in towns shown in figure 4C. These are mainly inland, although a few resorts like Eastbourne, Torquay, Bournemouth and Lytham do also have high values (the result of high demand). The most important group of inland towns is the County Town group (six of the seven are plotted on the figure). The remaining places are mainly in the Midlands.

Towns with large butchers shops are in the main the same as those with large grocery shops. (15 out of 23 towns with butchers shops averaging over £10,000 are also places with large grocers shops.) These places are mainly those found near to London or in Central Scotland. Regional Centres are not so significant in the list as in the grocery group.

The towns with large bakers shops show a similar correlation with those which have large grocery shops. In this case however, there is another group of towns which is far more numerous. This group, the towns which do not also have large grocers, are shown in figure 4C. A distinct Midlands orientation may be observed. This is a result of the high proportion of all trade accounted for there by co-operative societies (see P. 279), for co-operative bakers shops, particularly in this area, are large.

The towns with large greengrocers shops do not form much of a pattern. Variations are however small so this randomness might be expected. The only noticeable feature of the distribution is that generally such places are not towns with large other food shops. Four of the highest ten values are in the North, which generally has a low consumption rate, places like Stanley, Houghton-le-Spring and Consett.

A very different group of towns has large confectionery shops. Two main types of town can be distinguished. There are first the County Towns, with Salisbury having the highest figure outside London. Second, there are Suburban areas like Huyton with Roby, Ellesmere Port, Hoylake and Solihull. The importance of the Merseyside areas is a reflection of multiple organisations based on Liverpool.

County Towns also have large hardware shops, something which may be explained by the high density of shopping in their highstreets, and by demands of farmers for goods of this type. Some exceptions do occur, like Bootle, West Hartlepool and Scunthorpe but these are few in number. A similar pattern exists in the chemists trade, but in this trade more exceptions exist. These, in the main can be explained by particular social conditions, which either make it less desirable to a qualified pharmacist to set up in business in industrial areas, or which increase demand considerably above the average. Large shops are therefore found in places like Consett and Warrington, where there are few shops and the first factor is important, or in towns like Cheltenham and Tunbridge Wells where the second is important.

There are relatively few towns in the bookselling trade which have shops larger than the average, but some of those which do have high values record very high values indeed. Some variations appear to be rather fortuitous, Camborne for instance appears on the list, but clearly regional capitals rank highly. The highest values of all are found in Oxford (£33,035) and Cambridge (£23,756).

Jewellery shops are largest in the regional capitals. In Newcastle and Aberdeen they average £13,000, and in Glasgow, Edinburgh and Bradford over £9,000. County Towns also have high values.

The towns which have large furnishing shops (shown in figure 4C) are rather different to the groups so far considered. They are shopping centres of the industrial regions like Ashington, Blyth and Port Talbot, which have high ratios of multiple traders. Regional capitals like Newcastle, Aberdeen and Glasgow also have high values. It is interesting to note that the London boroughs of St. Pancras (£79,808) and Holborn (£55,341) have very high values.

There is a great range in size in the largest average figures for the clothing trades. Six towns however, have far higher values than any others (Newcastle, Torquay, Guildford, Taunton, Winchester and Cheltenham). These towns are a fair cross section of all towns with have large clothing shops. There are 39 towns in the clothing trade which have clearly higher figures than the remainder. In each of the sub-trades there are:-

Men's and Women's Wear	17 the same with	21 others
Boots and Shoes	15 " " "	9 others
Men's Wear	11 " " "	15 others
Women's Wear	24 " " "	10 others

Women's wear, and shoe shops reflect this general pattern most closely. In the other two trades exceptions are more marked. Regional contrasts, mainly in the incidence of large scale organisations, account for variations like the larger shops in the men's and women's wear trade in Clydebank and Castleford. Similarly, in the men's wear trade Warrington, Hamilton and Doncaster have particularly large shops.

The foregoing analysis has shown, amongst other things, that those towns towards the study of which this thesis is particularly orientated are clearly differentiated in terms of the size of their shops in a number of trades. To a considerable degree, however, this only occurs in the ordinary trade groups. One census group of shops in which they are not so significant is the General group, which contains department stores.

Geographical studies of towns have often sought to establish the existence of a hierarchy. The evidence which the Census provides for answering this problem can now be summarised in the following way. Chapter three showed that centres are distinguishable from non-centres, according to a net gain or a net loss of trade, and that market towns, the most significant of these centres, are distinguishable by their very high sales per head of resident population; towns of higher rank are distinguishable by their average size of shop, and this chapter has shown that the most significant of these are distinguishable by their size of shop in particular trades. Towns which are of even higher rank can however, only clearly be distinguished by the absolute numbers of the largest shops. The last section of this chapter therefore examines what evidence there is available on this point.

LARGE SHOPS

The preceding discussion has been conducted in terms of a hypothetical average size of shop. Clearly there are many shortcomings which cannot be avoided in such an approach. One feature of the size of shops that it is possible to examine in rather more detail is the location of particularly large shops. The data collected for the Census allows this to be approached from two slightly different angles. In the ordinary tables of volume two of the Census, figures are given for the General Group of shops, a type classified with reference to the minimum turnover and the variety of commodities stocked. A special table prepared for this study by the Board of Trade makes it possible to examine the distribution of shops with turnovers over £100,000 in certain trades.

<u>General Stores</u>

The Board of Trade's classification of General Stores includes many large shops. Three types may be distinguished. Department stores, which have sales exceeding £100,000 and which have sales over £5,000 in each of a number of commodity groups, are the most important. The definition of the type has however resulted in many anomalies in the classification. A comparison of the 1950 and 1957 censuses shows that of the 529 shops in this category in 1950, 113 could not be so classified in 1957, even though they were still in business. In contrast 301 shops out of 718 classified as department stores in 1957 were also in business in 1950, but were not then classified as department stores.[9] There are some good reasons for these variations, such as on one hand the rapid growth of trade, and on the other the replanning of premises resulting in the construction of separate shops for different departments, these do not however explain all the variations fully, a great number of these changes must simply be the result of marginal adjustments in the character of these shops.

A second type of shop distinguished in the Census is the Variety Bazaar. In 1950 there were 913 shops trading under this heading, and all but 23 were operated by organisations with other 25 establishments, belonging presumably to four chief companies. It should however, be noted that these companies had more branches than 913.

The major variety chains had a total of 1089 shops in 1950:-

Woolworth	761	Littlewoods	38
Marks & Spencer	240	British Home Stores	50
	Total 1089		

A third type of shop included in the Group is the Other General Stores, which "generally have sales of £20,000 or more... which though selling a wide range of goods are not appropriate for classification under Department Stores or

9. Census Distribution 1957 : Department Store Trading, <u>Board of Trade Journal 30th October 1959</u>

any other kind of business heading." (This probably chiefly means that these shops were not large enough to be classified as Department Stores).

The information which exists on the distribution of these types of shop is summarised in table 4.E.[x] The major feature of note is that there is a high correlation between the number of these stores and their size (0.8136 for the standard regions). This means that roughly the same amount of goods is bought in shops of this type in every area, the only variable feature being the size of the stores. Three regions do in fact account for almost all the regional variation. The North and the North-West have relatively high numbers of stores in relation to their average turnover, a feature which is the result of the significance of large towns in their pattern of trade and the importance of Co-operative organisations with their central emporia in their organisational structure. In the South the significance of speciality trade to many towns finds expression in an equally high ratio of shops to population.

In the North only a quarter of these General Stores are found in the Tyneside Conurbation, an area which includes 37% of the region's population. These stores are however far larger than those found elsewhere in the region, for in the conurbation it is possible to more fully exploit economies of scale since shopping populations are more concentrated. Twelve Department Stores, half of which are in Newcastle, make up a third of the stores in the conurbation. Those found in Newcastle have a particularly high average turnover,

The towns for which this figure is available are :-

Manchester	£1,461,000	Edinburgh	£979,000
Newcastle	£1,107,000	Glasgow	£708,000
Birmingham	£1,074,000	Sheffield	£651,000
		Stoke	£318,000

and even those in other areas of the conurbation are larger than those found elsewhere in the region.

The size of all General Stores does not correspond very closely with variations in the significance of towns, this is largely due to the somewhat random distribution of the Other General Store Category. A rather more accurate impression of the importance of towns may however, be achieved if the size of a town's general stores is compared with the regional average (Table 4.F.). In the North, Newcastle and Sunderland have distinctly large shops of this type. The national pattern is rather more confusing because of certain special features as it will be seen.

In the West Yorkshire Conurbation (41% of Yorkshire's population) are found 35% of the region's General Stores and these account for 58% of the sales of this type of shop. This in part reflects the importance of the Conurbation as the major shopping area of the two Ridings, but is also a result of the special opportunities available to owners of this type of shop in Conurbations. 9 of the 31 stores in the conurbation

Table 4.F. The Size of General Stores compared with the Regional Average (i.e. the number of times larger or smaller)

Index	Town	Carruther's Rank (see appendix B)
2.69	Cardiff	P2
2.54	Leicester	P2
2.47	Nottingham	2
2.43	Leeds	2
2.41	Manchester	2
2.13	Glasgow	2
2.04	Newcastle	2
2.02	Reading	3A
1.93	Oxford	3A
1.93	Sunderland	3A
1.91	Edinburgh	2
1.77	Bournemouth	3C
1.72	Brighton	3A
1.60	Birmingham	2
1.58	Swansea	3A
1.52	Southampton	3A
1.50	Liverpool	2
1.46	Wolverhampton	3B
1.42	Bristol	2
1.34	Middlesbrough	3A
1.29	Derby	P2
1.25	Gateshead	-
1.21	Sheffield	2
1.16	Portsmouth	3C
1.07	Southend	3C
1.0	Aberdeen	2
0.95	Dundee	2
0.94	Stoke	P2
0.88	South Shields	-
0.84	Plymouth	P2
0.80	Blackpool	3C
0.78	Norwich	P2
0.76	Birkenhead	-
0.60	Northampton	3A
0.49	Rhondda	-

are located in Leeds, these have an extremely high average turnover. Outside the Conurbation Sheffield with 14 stores and Hull with 8 are important shopping centres, whose relative significance is probably fairly well expressed by these numbers. The only available information on the location of Department Stores in this area is that Sheffield has 8 such shops and that other towns outside the conurbation have fourteen. It may be suggested that most of these are located in York and Hull.

In the North Midlands the four largest towns, Nottingham (10), Leicester (7), Derby (7) and Northampton (6) account for 30 of the 98 stores. As only twenty-five department stores are located in the region it would seem likely that most of these are located in these towns, and in towns like Lincoln and Peterborough. This hypothesis is given some support by the relatively large size of the General Stores found in the two largest towns of the region.

In the East and South East regions medium sized towns are of particular significance in the pattern of trade. This finds expression in the small proportion of stores found in the few large towns. In the East only 16 out of 113 stores are located in Norwich and Ipswich. In the South-East Brighton has only 9 out of 101. Another consequence of the relatively dispersed population pattern is that stores are relatively small in both these regions. The ratio of variety stores to department stores is high, and even the variety stores tend to be smaller here than in other regions of the country.[10] All these considerations are, of course, general reflections on the structure of the urban hierarchy of the regions, for

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10. Marks & Spencer for instance had no stores with a sales area of over 20,000 squ.ft. in the South East in 1961 (figure 5.B.)

the dominance of London, particularly noticeable in this sort of trading, has prevented any other town gaining a full second-order status.

In the South the larger towns are more important, and do in fact have rather higher proportions of stores than their regional significance alone would warrant. 47 out of 106 stores (44%) are found in Bournemouth (12), Southampton (11), Portsmouth (10), Reading (9) and Oxford (5). Further more these stores are relatively large, with Reading, Oxford and Bournemouth ranking very high in table 4.F., and account for 74.2% of all sales, whereas only 34% of the region's population is found in these towns.

The concentration of stores in the South-West is lower than in the South, but higher than in the remainder of Southern England. 12 stores are found in Bristol and 11 in Plymouth out of a total of 102. It is however significant that these stores are not much larger than stores found elsewhere in the region : in such important centres as Taunton, Exeter, Gloucester and Torquay.

In the Midland region half the stores are found in the conurbation, and these account for slightly more than half the region's trade (the conurbation has half the region's population). 9 department stores are located in Birmingham, and only 4 in other areas of the Conurbation. Stoke, the largest town outside the Conurbation, has 9 department stores, these are however only a third of the size of those situated in Birmingham.

The significance of the two Conurbations in the North-West in these types of trading is clear from the high proportion of stores found in the conurbations in relation to their size:-

%	Department	Variety	All Types
Sales	84	77	71
Establishments	72	57	61
Population			58

Interesting differences may be noted between Manchester and Liverpool. Manchester has only two more stores than Liverpool, but, in all, its stores have a turnover of over £12,000,000 higher. Liverpool, however, has 17 department stores while Manchester has only 10.

The pattern of stores found in Wales is very different from that found in the rest of the country, indeed it would seem possible to distinguish an English pattern and a Celtic pattern of store trading for there are marked similarities with the Scottish pattern. 35 stores out of 118 can be located. 15 are found in Cardiff, and ten each in Swansea and Rhondda. This last area is of special interest for stores' sales there <u>average</u> only £52,000, which means that there can scarcely be more than one department store. It would seem in fact that retailing is not greatly specialised in this area, with all the large stores stocking a wide range of goods and therefore falling in this group rather than in any of the specialised groups of the Census.

In Scotland a similar situation exists in the "rural" areas. In such areas 88 stores are found with an average turnover of £100,000 (the stores of rural Wales have an average turnover of £90,000). It would seem likely that these stores fulfill those functions of the fourth order which are normally found only in specialist shops in third order towns (see chapter 3 P. 82). Glasgow (18) has most department stores in Scotland, and it and Edinburgh account for over half the stores of this type in the region and nearly eighty per centage of sales.

SHOPS WITH TURNOVERS OVER £100,000.

The Board of Trade has made figures, from the 1957 Census, specially available for this account. These include all towns with five or more shops of this size in certain trade types.[11] They are set out in Table 4.G.*

The first feature of significance shown by the table is that the population per shop ranges from 23,412 in Stockport to only 2,554 in Stirling. This variable is not closely related to the overall size of a town except in the case of a number of the smallest towns, those with a population under 45,000, which have a fairly uniformly small number of

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11. These include general stores, clothing and household goods shops. Census of Distribution 1957 op cit

inhabitants per shop of this type (i.e. the hinterland factor is significant). The towns in which there is under 7,000 people to each shop are:

Newcastle	Doncaster	Guildford	Perth
Stirling	Oxford	Barnsley	Ayr
Worksop	Ashington	Cambridge	Harrogate
Kilmarnock	Taunton		

These are an interesting selection for they include towns which are particularly noted for the quality of their shops by upper class customers, and also towns which are special working class shopping centres.

Perhaps of rather greater significance is the sales of these shops per head of population. This shows a range of from £91.7 Newcastle to £10.0 in Poole. Towns in which sales amount to £40 a head are :-

Newcastle	Chester	Sunderland	Bath
Stirling	Oxford	Harrogate	Exeter
Gloucester	Cheltenham	Reading	Cambridge
Guildford	Taunton	Norwich	Worksop
Scarborough	Nottingham	Bournemouth	Doncaster
Watford			

These form a group which is more uniform, being very largely upper class shopping centres.

Towns with a small sales total by shops of this type form a group which is fairly uniform both in social structure and in subjective ranking of their significance as shopping centres:

Stoke	Walsall	Grimsby	Wigan
Southend	Preston	Swindon	Hastings
Stockport	South Shields	Poole	Wrexham
Luton	Blackburn	Slough	
Huddersfield	Paisley	Greenock	

The only rather exceptional cases are Preston and Wrexham which are considered to be of greater significance in the hierarchy of shopping centres.

The average size of these large shops varies from £136,000 to £800,000. The towns which have average figures of over £500,000 are:

Birmingham	Bradford	Watford
Liverpool	Newcastle	Gloucester
Manchester	Bristol	
Nottingham	Gateshead	

This is a very different sort of grouping to those found above, one in which hierarchical significance is a far greater element. In fact all second order centres have fairly large stores. Those not listed above are:

Glasgow	£411,000	Hull	£494,000	Cardiff	£433,000
Leeds	£492,000	Leicester	£422,000		
Sheffield	£415,000	Stoke	£367,000		

The relationship between the size of these shops and the rank of towns is set out in table 4.H. It shows that there is a fairly good relationship in ranks '2', '3A' and the other '3' centres, but that '3B' is not distinguished from '3C'. A partial reason why this lack of distinction exists is that

Table 4.H. Hierarchy and Size of large shops (£'000)

	under £250	£250-399	over £400,000
2		5	13
3A	1	13	8
3B	8	8	1
3C	5	13	2
3G	2	8	

many 3B centres have a relatively large number of small shops.

Towns with a population of over 40,000 which are not recorded as having five stores with sales over £100,000 are all relatively minor centres. Apart from suburban areas of the major conurbations they may be classified as follows:-

3B	3C	3G	Others
1	8	7	14

Lancaster is the only 3B centre in this category.

This section has attempted to show what relationships there are between the character of a town's shops as revealed by Census information and the town's rank or regional location. It will be possible to show something of these relationships with far greater precision when the data of the 1961 Census is available. This will have the added advantage that is will be possible to make comparisons in time, a necessity for any real understanding of urban structure. The remaining parts of this thesis are devoted to a study of more of the determinants of the pattern of retailing, particularly the organisational controls.

Table 4E EXPLANATORY NOTE

This table refers to the general Stores Group of the Census, which is, in some Census tables, further subdivided into "Department Stores" and "Variety and other General Stores". It brings together all available data on the distribution of these shops. It should be read by regions in the following way:-

(a) The Northern Region - speaks for itself.

(b) The Tyneside Conurbation - Registrar General's Conurbation area.

(c) Newcastle - The C.B.

(d) Rest of Tyneside - The area of (b) less (c).

(e) Gateshead and South Shields - The C.B's.

(f) Rest of Tyneside - (d) less (e).

(g) Rest of North - (a) less (b).

(h) Middlesbrough and Sunderland - The C.B's.

(i) Remainder - (g) less (b).

Other Regions are subdivided in similar ways.

TABLE 4.E. GENERAL STORES.

Area	DEPARTMENT STORES No.	DEPARTMENT STORES Sales £'000,000	DEPARTMENT STORES S/E £'000	VARIETY STORES & OTHER GENERAL No.	VARIETY STORES & OTHER GENERAL Sales £'000,000	VARIETY STORES & OTHER GENERAL S/E £'000	ALL GENERAL STORES No.	ALL GENERAL STORES Sales £'000,000	ALL GENERAL STORES S/E £'000
NORTHERN REGION	63	28.4	451	63	7.3	118	126	35.9	285
Tyneside Conurbation	12	9.4	895	21	2.9	138	33	12.3	374
Newcastle	6	6.6	1107	9	2.1	229	15	8.7	580
Rest of Tyneside	6	2.8	463	12	1.9	157	18	4.6	258
Gateshead							5	1.8	357
South Shields							5	1.3	250
Rest of Tyneside							8	1.6	201
Rest of the North	51	21.0	412	42	4.4	105	93	25.4	274
Middlesbrough							8	3.1	382
Sunderland							9	4.9	549
Remainder							76	17.4	229
EAST & WEST RIDINGS	35	21.5	617	54	17.7	327	89	37.2	417
West Yorkshire Con.	13	11.9	914	18	9.8	544	31	21.7	699
Leeds							9	9.1	1014
Rest of Conurbation							22	12.5	570
Rest of Region	22	9.6	439	36	7.9	219	58	15.5	269
Hull							8	2.6	325
Sheffield	8	5.2	651	6	1.9	309	14	7.1	505
Remainder	14	4.4	317	30	6.0	201	36	5.9	161
NORTH MIDLAND	25	11.7	468	73	8.2	112	98	19.9	203
Leicester							7	3.6	516
Nottingham							10	5.0	503
Derby							7	1.8	261
Northampton							6	0.6	98
Rest of Region							68	8.8	129

TABLE 4.E. GENERAL STORES. (cont.)

Area	DEPARTMENT STORES No.	Sales £'000,000	S/E £'000	VARIETYSTORES & OTHER GENERAL No.	Sales £'000,000	S/E £'000	ALL GENERAL STORES No.	Sales £'000,000	S/E £'000
EAST REGION	28	10.2	365	85	8.4	99	113	18.6	165
Norwich							8	1.0	126
Southend							8	1.4	177
Rest of Region							97	17.2	177
SOUTH EAST REGION	27	8.5	315	74	7.8	106	101	16.3	161
Brighton							9	2.1	277
Rest of Region							92	14.2	154
SOUTH REGION	37	16.2	439	69	7.1	103	106	23.3	220
Bournemouth							12	4.7	389
Oxford							5	2.1	424
Portsmouth							10	2.5	255
Reading							9	4.0	445
Southampton							11	3.7	335
Rest of Region							61	6.3	103
SOUTH WEST REGION	35	12.4	382	67	7.9	117	102	20.3	199
Bristol							12	3.4	282
Plymouth							11	1.8	167
Rest of Region							79	15.0	190
WALES	27	8.0	297	91	6.9	76	118	14.9	126
Cardiff							15	4.9	327
Rhondda							10	0.5	52
Swansea							10	2.0	199
Rest of Region							83	7.5	90
MIDLAND REGION	32	18.6	580	115	15.3	133	147	33.9	231
West Midland Conurb.	13	12.3	945	57	6.4	113	70	18.7	268
Birmingham	9	9.7	1074	27	3.3	122	36	12.9	369

TABLE 4.E. GENERAL STORES. (cont.)

Area	DEPARTMENT STORES No.	Sales £'000,000	S/E £'000	VARIETY STORES & OTHER GENERAL No.	Sales £'000,000	S/E £'000	ALL GENERAL STORES No.	Sales £'000,000	S/E £'000
MIDLAND REGION (cont.)									
Wolverhampton							9	3.0	337
Rest of Conurbation	4	2.6	654	30	3.2	156	25	2.8	110
Rest of Region	19	6.3	329	58	8.9	153	77	15.2	199
Stoke	9	2.9	318	8	0.9	107	177	3.7	218
Remainder	10	3.4	341	50	8.0	161	50	11.4	229
NORTH WEST REGION	55	38.4	699	111	31.6	285	166	70.0	422
S.E. Lancs. Conurb.	15	15.8	1053	43	16.3	379	58	32.1	553
Manchester	10	14.6	1461	18	13.8	768	28	28.4	1015
Rest of Conurbation	5	1.2	237	25	2.5	994	30	3.7	122
Merseyside Conurb.	24	16.6	693	20	8.8	438	44	25.4	577
Liverpool	17	14.6	861	9	1.8	201	26	16.4	632
Birkenhead							8	2.0	252
Rest of Conurbation	7	2.0	287	11	7.0	641	10	7.0	695
Rest of Region	16	6.0	375	48	7.5	178	64	22.5	352
Blackpool							6	2.0	338
SCOTLAND	47	25.0	531	107	14.3	134	154	39.3	255
Glasgow	18	12.7	708	16	5.7	359	34	18.5	544
Edinburgh	7	6.9	979	8	1.4	179	17	8.3	487
Rest of Scotland	22	5.4	249	83	7.2	863	103	12.5	121
Aberdeen							8	2.0	255
Dundee							7	1.7	242
Remainder							88	8.8	100

Table 4.G. Shops with Turnover of £100,000 and over in Certain Kinds of Business (1957)

	1	2	3	4
	P/E	S/H	S/E	% of 1950
Birmingham	20.5	25	500	18
Glasgow	10.8	38	411	28
Liverpool	14.7	44	623	33
Manchester	16.4	43	698	23
Leeds	13.8	36	492	24
Sheffield	12.0	35	415	27
Edinburgh	10.1	38	388	25
Bristol	19.8	20	800	16
Nottingham	14.2	41	582	25
Coventry	23.5	21	462	23
Hull	19.0	26	492	23
Bradford	24.6	23	567	14
Leicester	11.9	37	422	21
Newcastle	6.0	92	549	44
Stoke	22.1	16	367	13
Cardiff	11.7	37	434	28
Portsmouth	13.5	31	416	23
Southampton	13.6	35	473	28
Plymouth	12.8	37	481	32
Sunderland	11.8	43	511	37
Aberdeen	7.2	37	270	23
Dundee	11.1	36	404	26
Swansea	15.2	25	373	23
Southend	12.6	20	254	15
Brighton	10.9	33	354	20
Bolton	14.7	21	304	16
Middlesbrough	9.8	38	377	34
Bournemouth	8.1	51	411	24
Blackpool	10.1	28	279	16
Wolverhampton	12.5	39	494	22
Stockport	23.4	14	323	11
Birkenhead	17.7	20	360	18
Derby	7.8	37	301	21
Luton	;6.4	20	322	17
Huddersfield	13.0	20	256	13
Norwich	7.5	42	317	23
Reading	12.0	43	510	23
Walsall	19.7	17	330	14
Ipswich	9.0	31	279	22
Romford	15.0	30	382	27
Preston	16.4	16	253	9
Newport	15.4	23	360	18
South Shields	18.2	20	363	20
Oxford	6.6	49	427	24
Blackburn	21.0	13	271	10
Northampton	17.6	18	310	11
York	7.5	31	238	20

Table 4.G. cont.

	1	2	3	4
	P/E	S/H	S/E	% of 1950
Gateshead	20.7	30	616	30
Paisley	16.2	20	321	
Grimsby	16.1	17	281	13
Cambridge	6.4	52	333	29
Swindon	18.3	12	220	10
Poole	17.6	10	136	10
Doncaster	6.6	44	290	24
Rotherham	8.5	31	262	24
Darlington	9.4	34	315	21
Southport	10.2	28	289	16
Stockton	8.2	39	318	31
Bath	8.1	40	327	23
Slough	13.4	17	234	14
Greenock	10.0	18	183	18
Exeter	7.3	40	293	24
Worthing	10.0	29	289	20
Wigan	15.5	20	311	13
West Hartlepool	11.0	25	272	22
Lincoln	9.6	35	337	22
Watford	13.3	41	616	22
Warrington	12.6	21	267	14
Barnsley	6.2	40	246	25
Cheltenham	8.0	47	378	28
Carlisle	10.2	35	365	19
Motherwell	10.0	23	232	21
Gloucester	11.9	55	639	31
Chesterfield	9.8	34	328	22
Hastings	13.2	18	231	12
Worcester	9.6	20	177	9
Colchester	8.1	28	231	19
Bedford	12.7	31	369	18
Wrexham	12.5	19	232	17
Peterborough	10.3	24	245	15
Wakefield	8.6	23	204	15
Eastbourne	10.1	37	371	19
Maidstone	10.0	27	228	15
Chester	6.7	50	328	19
Harrogate	5.1	43	213	16
Torquay	8.7	30	266	17
Guildford	6.0	52	309	25
Mansfield	10.6	36	383	20
Gt. Yarmouth	10.6	31	324	25
Gravesend	10.3	20	210	16
St. Albans	8.4	28	230	17
Shrewsbury	7.1	36	254	18
Folkestone	8.8	31	277	18
Weston	8.8	23	199	14
Ayr	5.4	39	210	19

Table 4.G. cont.

	1	2	3	4
	P/E	S/H	S/E	% of 1950
Royal Leamington	8.6	30	260	18
Scarborough	7.1	45	318	19
Kilmarnock	6.1	33	238	19
Perth	6.9	28	194	15
Hereford	8.1	32	258	17
Tunbridge	8.0	37	296	19
Worksop	5.7	51	289	39
Falkirk	7.6	31	153	16
Pontypridd	7.1	28	199	18
Taunton	5.0	47	233	23
Stirling	2.6	59	147	27
Ashington	5.4	27	139	18

1. = Population per Large Shop ('000)
2. = Sales by Large Shops per Head of urban area's population (£'s)
3. = Sales per Large Shop (£'000).
4. = % of Total Sales (1950) accounted for by Large Shops (1957).

Source : Special Table Prepared by Board of Trade.

SECTION THREE

THE ORGANISATION PATTERN

"The geography of the firm is an attempt to go beyond the analysis of mere things in economic geography to a consideration of man himself and his social organisations. ... If one carries the views of Vidal de la Blache to their logical end and applies them to the modern urban-industrial world, it is difficult to escape the conclusion that the most important single institution in the urban-industrial genre de vie is the modern corporation."

R.B. McNee: Tijdschift Voor Economische En Sociale Geographie. August 1960.

CHAPTER FIVE

MULTIPLE RETAILERS.

The situations (i.e. general locations rather than actual sites) favoured by multiple organisations when establishing new branch shops are related in one of two ways to an overall location pattern. There are first those organisations to which a close net of branches is most important, and second those to which the density of shoppers around any particular site, wherever it is found, is the major consideration when selecting situations. The first type is to be referred to as the network pattern and the second as the hierarchical, for the former leads fundamentally to a large number of shops in a small area, while the latter leads theoretically, although as it will be seen rarely completely fully in practice, to branches being set up in shopping centres in their national order of importance (e.g. for some types of trade the order might be the West End of London; Market St., Manchester; Sauciehall St., Glasgow ...). A simple distinction of this type is of course a gross over-simplification of the total actual pattern. Nevertheless while all organisations pay some attention to a hierarchy of important shopping centres, for land values insist that they should, network orientated organisations limit their consideration of the relative importance of shopping centres to a particular area.

In 1950 the Board of Trade was able to distinguish 1,769 separate multiple organisations. In 1957 this number, owing to difficulties of classification, to the more limited extent of the Census, and to a series of important amalgamations, had been reduced to 1,151. Attempts have been made to examine as many multiple organisations as possible, the total number involved is however great. Many important organisations refused to provide any information and so important gaps remain in the coverage. In the account that follows, description is based on full lists of branches which usually form the basis of maps or tables, on rough lists compiled from various sources [1], or on simple trade directory entries (these more incomplete lists have usually been generalised viz - Liverpool and District). The possibility of ever achieving a full coverage of multiple organisations cannot be great, but it should be noted that only one organisation refused an address list when it had been possible to arrange a visit to a headquarters.

Before examining individual trades two questions of general importance should be mentioned. They are, firstly, the degree of independence provided by a company to its

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1. Telephone Directories are of little use for compiling full lists of branches e.g. Montague Burton Ltd. - only 450 out of 497 branch shops are listed in current directories.

subsidiaries, and, secondly, the general methods by which multiple organisations have acquired additional branches. The independence of subsidiary companies varies enormously, but unfortunately only in a limited number of cases is it possible to be completely sure of the exact nature of the effects of this sort of connection in questions of location.

A question of major geographical concern is the expansion of organisations. As an initial working hypothesis it was thought that some attempt should be made to trace the precise order in which branches were acquired by a company, in order that a full test of the significance of hierarchical factors might be achieved. Few organisations were able to supply such detailed records. The expansion of retail organisations may occur in one or two ways, or in a combination of these ways. New branches maybe established, or individual existing shops acquired, in shopping centres in which a company has no existing branch, thus gradually building up the network or extending the coverage of the hierarchy. Alternatively the organisation may grow by acquiring complete organisations either to consolidate the coverage of an area in which it already has branches, or to extend its activities into a new area. In general the first of these methods is most significant in those cases in which hierarchical considerations predominate, and the second in those in which network factors are most important. This is understandable for there are considerable problems to be faced by a network organisation when setting up branches in a new area. The conditions are always strong which initially determined the extent of the existing activities of the company, such as distance from a central depot, ease of administration, or first hand knowledge of conditions in a trading area. Expansion is therefore achieved very often only by the acquistion of another existing network of branches, with established depots, and often with executives who have had experience of trading in the new area [2]. The special importance of the last two of these three factors can be seen in many examples of amalgamations, when a large number of the shops of an organisation are closed following amalgamation. Thus Greenwoods Ltd. closed nine out of a chain of seventeen stores three months after it had acquired them in order to extend its coverage of branches from Northern England to South Wales. The two methods of expansion are not mutually exclusive. Indeed both may occur in the same company.

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2. "Executive Buying" has played a very large part in many of the amalgamations of recent years. Montague Burton Ltd. acquired its interest in Jackson The Tailor Ltd. largely to boost its executive team after the death of Sir Montague Burton (the present chairman of Burton's is Lionel Jacobson, formerly chairman of Jackson's). Fitch Lovell largely acquired Green's Stores for the experience of the chairman of that company.

Many of the largest [3] organisations have developed a chain of national extent by the first method, and then have acquired various subsidiaries to fill in their networks in certain areas, or, rather more frequently, just to acquire a far greater share of the total market. It is rare however, for location factors to be of no significance at all in this type of merger.

This chapter takes the form of a number of studies of particular trades, examining those particular trades in which it was possible to achieve a fairly full coverage of all organisations. A trade approach is an absolute necessity for the factors which are important in terms of location differ quite markedly from trade to trade. Once more it is necessary to emphasise that this is a study of the Retail Trades not the Retail Trade.

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3. The terminology used in this chapter is that introduced in chapter two: small multiples 10-24 branches; small medium 25-49; large medium 50-99; and large or national over 100.

VARIETY CHAIN STORES

A variety chain store is a reasonably accurate indicator of an important shopping centre. Initially stores of this type were sited in major centres so that they could take advantage of the impulse purchases of the large numbers of shoppers found in such centres. More recently, particularly in the case of the three smaller organisations, they have become important attracters of custom to shopping centres in which they are found. Smailes'[4] assertion that they "are an exceedingly valuable gauge of shopping importance" is very true.

The companies which are classifable as variety chains are:-

F.W. Woolworth Ltd.	1050	Branches	
Marks and Spencer Ltd.	237	"	(M & S)
British Home Stores Ltd.	74	"	(B.H.S.)
Littlewoods Ltd.	62	"	

The significance of the hierarchical factor in determining the location of their branches is shown in Table 5A., which also shows the numbers of stores in each standard region. Figures 5A. and 5B. show the distribution of the branches of the two largest companies.

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4. A.E. Smailes (1944) P.42

Table 5.A. Variety Chain Stores

Company	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
Numbers of Shops:												
Woolworth	55	43	61	76	223	67	71	78	96	106	62	83
M. & S.	3	5	8	8	18	7	3	7	5	6	4	--
B.H.S.	14	20	17	19	45	20	18	18	18	25	9	12
Little-woods	2	3	2	2	8	4	5	4	10	11	5	3
Population Per Shop: ('000)												
Woolworth	59	95	60	49	37	44	40	35	49	62	43	61
M. & S.	132	208	214	197	182	147	157	189	264	263	293	431
B.H.S.	1,084	834	454	417	454	417	938	487	951	606	660	--
Little-woods	1,626	1,389	1,817	1,868	1,021	730	564	852	475	330	528	1,725
Total Retail Sales 1950 : Number of Stores : (£'000,000)												
Woolworth	5.3	9.2	5.3	3.8	4.6	3.9	3.9	3.5	4.3	6.0	3.4	6.2
M. & S.	21	20	19	15	23	13	15	15	23	14	23	43
B.H.S.	98	79	41	36	57	38	87	40	83	106	52	--
Little-woods	147	133	162	144	129	66	52	70	42	58	50	172

The larger size of the first two organisations is only partly the result of their longer period of growth (M & S was founded in 1884, Woolworth (in England) 1909, B.H.S. in 1928, and Littlewoods in 1937.)

Woolworth's have four times as many branches as M. and S. since they are prepared to trade in very small shopping centres. This policy is partly a result of the types of goods which they sell, and partly the result of an almost imperial drive of Woolworth to establish a thousand branches in Britain. Indeed policy at one time was based on a self-confidence that may be expressed in the following way: "if Woolworth was not where the trade was, the trade would come to Woolworth". In view of this the close relation between Woolworth's branches and the lower ranks of the hierarchy is remarkable.

Marks and Spencer in contrast are committed to a policy of large stores, and in fact their average turnover per store has risen from £313,347 in 1951 to £708,443 in 1962. Their redevelopment scheme is so phrased that for the next ten years, at least, it is reckoned that all existing stores will only be modernised by the time it becomes necessary to redevelop the first modernised store. There are it seems considerable advantages available to large stores, in such matters as the effective layout of wide selections of goods, and the handling of the large numbers of weekend customers.

It is not surprising therefore, that large numbers of new stores are not planned, especially, as it will be seen, that the majority of shopping centres of any significance already have a M. and S. stores.

Small regional variations are characteristic of organisations to which hierarchical factors are most important. This is shown to be generally true for both Woolworth and M. and S. in table 5A, although in both cases stores are relatively rare in Scotland and frequent in Southern England. Since M. and S. stores are relatively large in Scotland this lower frequency is to some extent understandable. B.H.S. and Littlewoods have no stores in Scotland and Littlewoods only three, it is clear that the small towns, which are so important in the Scottish trading pattern (see chapter three), have populations which are too small to be favourable for the establishment of the large type of variety store favoured by these organisations. Even the larger organisations have most of their branches in the Central Lowlands.

Those other regional variations which do exist may largely be explained by total variations in spending. Table 5A relates the number of stores to the total retail sales in each region in 1950. This shows a regional variability that is far lower than that for population. The relatively large number of Woolworth's stores in London is very largely the result of variations in spending power. London ranks second in terms of population per store but only sixth by the sales index. Both Woolworth and M. and S. show that they have more stores, in relation to total sales, in regions where there are large numbers of third order centres like the East, the South East, the South and the South West. In the conurbations the higher purchasing power of customers is partly absorbed by the relatively large stores found there and partly lost to other forms of trading.

The smaller organisations, mainly as a result of their more recent growth, are less evenly spread throughout the country. Littlewoods for instance have 35% of their stores in the North West and Midland regions (21% of the population). British Home Stores have 44% of their stores in London, the South East and East (29% of the population). It might be thought that these degrees of concentration are relic features of earlier regional or network distributions. Littlewoods however, opened its first four stores, during 1937, in Blackpool, Brixton, Brighton and London's Oxford St. (i.e. well separated). The opening of branches in every period has shown little regard to establishing a close network :-

Table 5B Littlewoods Ltd : Store Openings

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales
1937-1940	1	2	2		4	3	1		4	6	1
1946-1950					3	1	1	1	3	2	2
1951-1962	1	2		2	4	1	3	2	5	6	1

Far more likely is that the location of head offices, in Liverpool and London respectively, has meant that the smaller organisations have been more receptive to opportunities in their immediate areas than elsewhere in the country.

The early evolution of the larger chains suggests that this lack of regional bias is the result of improvements in communications, including the widespread use of telecommunications. Even so both organisations had branches widely separated at an early date. M. and S.'s first bazaar was located in Leeds, but it was only three years after this that the first store outside Yorkshire was opened, actually at Warrington (the fifth store in the chain). Before 1901 there was a marked concentration of activity in Northern England (Table 5C). During the period 1902-1914 however, nearly half the stores opened were located in

Table 5C   Marks and Spencer Ltd : Store Openings

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
Pre 1901	3	9	1					2	2	8	1	
1902-1914	6	8	4	10	32	8	4	9	5	11	2	
1915-1929		2	1	1	1	3	2		2	1		
1930-1945	5	2	12	7	32	9	14	7	9	11	6	11
1946-1962		1					1					1

London. It is significant that no regional variations developed during the succeeding periods. M. and S. became a public company in 1926, something clearly reflected in the numbers of stores opened between 1915 and 1929.

No full data [5] are available on the evolution of Woolworth's stores. The American origin of the organisation makes this rather different to the other chains. In 1909 Woolworth, who by then had nearly 400 stores in the U.S.A., established a head office in London, and made a careful study of sites in twelve towns [6]. The first actually to be developed were, in order, Liverpool, Preston, Manchester, Leeds and Hull. (i.e. more a regional pattern than a hierarchical one, when it is remembered that offices were in London). Soon however, a far wider distribution was established. The initial appeal of the bazaar was particularly to working class shoppers, which were strongly concentrated in the great northern cities. This is of interest for Woolworth's deliberate choice of the area on which Marks and Spencer was based suggests that the growth of that organisation was not simply the result of the activities of a particular entrepreneur, but that conditions in the area were generally favourable to this form of retail organisation.

Careful selection of sites makes the closure of stores by variety chains fairly rare. In the case of the smaller

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5. Background information may be found in:
   J.K. Winkler, Five and Ten: The Fabulous Life of F.W. Woolworth. London, 1941

6. J.M. Wood, "The Anatomy of Private Trade, Agenda June 1957 P87
   The towns were Northampton, Southampton, Portsmouth, Croydon, Brighton, Reading, Hammersmith, Kensington, Wolverhampton Coventry, Liverpool and Manchester.

organisations, particularly, the capital expenditure required for the establishment of large new stores makes their stores more comparable with factories than most shops. Inertia factors widely recognised by economic geographers in industrial locations are therefore probably of greater significance than in other parts of the retail trades. M. and S. have in fact only finally closed eight stores throughout their history (this number excludes those closed to allow replacement in the same shopping centre). All of these were opened before 1914, and five were in low ranking centres in Lancashire, relics of the regional pattern. Littlewoods during its shorter history has also finally closed eight stores (another eleven have been closed to allow replacement). Two of these are found in towns in which there is a second store, and four in suburban centres of London and Birmingham.

Studies of the hierarchy of shopping centres within conurbations have found that the presence of a Woolworth's store "indicates a shopping centre which has developed beyond a mere group of neighbourhood shops." [7] When however, an inter-urban analysis [8] is made of the towns which have more than one branch great variations are revealed. In the case of the towns with four or more stores the population per

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7. A.E. Smailes and G. Hartley (1961)

8. See P. 204

store ranges from 123,488 in Sheffield to 29,244 in Southampton. An adequate explanation of the variations would require far more detailed comparative data on the structure of shopping centres than is at present available. One significant feature is that resorts tend to have relatively large numbers of shops. These are probably smaller than elsewhere for the type of shopping carried out in them is not one which favours large central stores. Many of the other urban areas listed are towns in which well established secondary shopping centres exist: Rhondda, Havant, Middlesbrough, Norwich and Grimsby.

Towns which have a single Woolworth's branch are numerous, and since they are nearly "found everywhere " analysis is worth little. It is of interest to note however, that of the four places cited by Smailes [9] as "district shopping centres", without a Woolworth store in 1944, Hexham, Northallerton and Ormskirk have acquired such a store in the last eighteen years, but Welshpool, the fourth, still has no store.

A comparison with Carruthers's list of the urban hierarchy shows close similarities between the rank of a town and the existence of a Woolworth's store. All towns classified as second or third order centres have at least one store. The relationship with the grades of the fourth order is however, less close. In a number of counties examined in Table 5D all 4A centres except Fakenham have a store.

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9. Smailes (1944) P.42

Table 5D. Woolworth Ltd : Nranches (B) and Fourth Order Centres (A)

	Cornwall		Devon		Somerset & Dorset		Wiltshire & Oxford		Hampshire		Sussex	
	A	B	A	B	A	B	A	B	A	B	A	B
4A	8	8	5	5	3	3	2	2	2	2	3	3
4B	7	3	10	7	13	9	6	2	6	6	6	3
4C	4	1	7	2	4	1	10	2	8	4	8	5
Lower		0		2		1				4		9

	Lincolnshire		Norfolk		Suffolk		Shropshire & Hereford		Gloucester		Berks	
4A	5	5	2	1	1	1	4	4	1	1	1	1
4B	7	3	7	6	7	5	5	4	7	3	5	4
4C	2	0	4	1	6	1	1	8	3	0	1	0
Lower		1		3		0		0				3

Carruthers general conclusion was that "4A ... are in general those places offering the widest range of shopping facilities". The presence of stores in 4B centres varies according to the population density of the area in which a centre is found. In Cornwall only three out of seven such centres have a store, whereas all Hampshire's 4B centres have a store. The stores found in towns not classified as centres are mainly in resorts and suburban areas, in places like Cleethorpes, Keynsham, Gosport and Paignton.

Detailed examination of the distribution of the stores of the remaining organisations shows that there is a surprisingly small correlation between their situation. Only fourteen towns outside London have branches of all three organisations. These are an assorted group, including for instance only four second order centres (Sheffield, Cardiff, Liverpool and Manchester). The towns which are prominent in the group are those third order centres which have high shopping densities, but which in the main are places of not exceptionally high rank, and in which in consequence, competition for sites from department stores and the larger speciality stores is to some extent limited. [10] The towns are Watford, Maidstone, Bedminster, Slough, Northampton, Scunthorpe, Portsmouth, Dudley, Swansea and Hull. The poor representation of these organisations in the second order centres, and towns which are similar to the above list rather suggests that the conclusion of a writer in Retail Business,[11] that the only possible remaining situations for B.H.S. and Littlewoods are in small centres, is not correct. The second order centres in which they are not represented are:-

Littlewoods		British Home Stores	
Nottingham	Newcastle	Leeds	Derby
Bristol	Norwich	Birmingham	Scotland
Plymouth	Leicester	Norwich	
Derby			

The relationship between the other stores of B.H.S. and M. and S. is close, for fourty out of the fourty-one outside London are found in towns in which there are M. and S.

10. See P.312 for a comparable case in the situation of supermarkets.

11. Economist Intelligence Unit, "Variety Chain Stores in Britain" <u>Retail Business No.2</u>.

branches. The only exception is Sutton Coldfield. The actual distribution of these branches of B.H.S. is shown below:-

	Rank of Town						
	2	3A	3B	3C	3G	4A	Others
No. of stores	6	12	7	8	3	2	2

It is of interest to note that the majority of the eight 3C centres listed are places found near London like Chatham, St. Albans, Luton and Southend. Similar places are the lower ranking centres, although in this case subsidiary to other major centres, like Birkenhead, Gravesend, Ilkeston and a resort, Margate.

Littlewoods is less closely related to M. and S., for their more recent growth has to some extent necessitated a colonisation of smaller, less important, shopping centres. The stores which are in centres which also have an M. and S. store are a varied group of towns:-

	Rank of Town						
	2	3A	3B	3C	3G	Others	Total
No. of stores	4	3	3	5	2	3	20

These towns are particularly concentrated in the North West. The sixteen places which only have a Littlewoods store are of two types. There are nine major suburban shopping centres, which are as it has been seen particularly favourable to this type of shop. The remaining seven are small towns or the two new towns, Crawley and Basildon. Their population in 1961 was :-

Oswedtry 11,193	Carmarthen 13,249	Truro 13,328	
Banbury 20,996	Dumbarton 24,319		

They should be compared with Ilkeston (34,672), the smallest town with a Marks and Spencer store.

The distribution of M. and S. stores, since the total pattern is nearly national, follows the ranks of the urban hierarchy closely. This correspondence is extended to a close relation between the size of an M. and S. store and the rank of the town in which it is found. Table 5E shows the distribution of stores related to the hierarchy in three size categories.

Table 5E. Marks and Spencer Ltd : Branches graded according to sales Area and Rank of town

Size of sales area (sq.ft.)	2	3A	3B	3C	3G	4A	London	Rest of G.B.	"Resorts"	Others	Total
>20,000	17	7	3	2	0	0	6	0	0	0	35
10,000-20,000	3	13	13	19	9	3	20	4	1	2	87
c10,000	0	4	6	32	7	27	22	4	5	7	114
No. stores	0	0	4	9	1	80					
No. of centres	18	23	26	61	17	109					

The only second order centres without large stores are Stoke and Dundee, probably the two lowest ranking of the order. In the 3A group three of the four towns with only small stores are county towns, Shrewsbury, Hereford and Salisbury. The competition for sites in shopping centres of limited extent, the difficulties which burgage holdings present to the developer in finding a large enough plot, and possible differences in the type of demand found in these centres make this understandable.

The 3B centres which have large stores are all places which might warrant higher rank than this, for they are located close to second order centres and so bus routes form a less valid criteria of shopping movements. These places are in fact Worcester, Newport and Wolverhampton. As in the case of the 3A centres most towns with small shops are of the county town type, namely Yeovil, Peterborough, Chelmsford and Boston (Doncaster is the fifth, an anomaly). The centres which have no stores are all small towns serving extensive hinterlands with low population densities in Wales, Aberystwyth, Carmarthen, Bangor and Caernarvon.

The 3C centres which have large stores are Blackpool and Luton, both of which have special functions and therefore warrant a higher rank than bus routes suggest. The great majority of towns of this rank have small stores.

Only eight stores larger than 10,000 sq. feet are found in places ranking lower than the third order. Four of these are in Scotland and the Isle of Man, and therefore not included in the classification, but which are probably of the third order. The exceptions are two resorts, Llandudno and Morecambe, and two towns of the Home Counties, Gravesend [12] and High Wycombe [13].

The other stores located in places of fourth order rank are found in towns which are market towns (like Bridgwater, Newton Abbot and Maidenhead), resorts (like Redcar, Deal and Clacton) and suburban centres (like Bedminster and Wallasey).

In conclusion it may be said that the variety chain store follows the pattern of the hierarchy very closely. There are however, some significant variations, hierarchical and regional, the main one of which is the special importance of these shops in suburban shopping centres of the Home Counties, where there is both the high density of shoppers and the space for this type of establishment.

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12. Gravesend is classified as an "A"- centre by Smailes and Hartley.

13. High Wycombe, the store was extended in 1956, nine years after the data on which Carruthers' study was based.

F.W. Woolworth Ltd: Urban Administrative Areas With More Than One Store

Town	No.	P/E	Town	No.	P/E
Greater London	223	36,645	Nottingham	10	31,165
Birmingham	33	33,505	Hull	5	60,656
Glasgow	9	117,213	Newcastle	6	44,898
Liverpool	14	53,392	Stoke	6	44,251
Manchester	12	55,087	Cardiff	5	51,252
Leeds	2	205,299	Southampton	7	29,244
Sheffield	4	123,488	Southend	4	41,244
Bristol	10	43,644	Bournemouth	4	38,491

Population Per Establishment

Three Branches:-

Coventry	101,687	Swansea	55,580	Wigan	26,234
Portsmouth	71,733	Brighton	54,252	Havant	24,854
Plymouth	68,093	Blackpool	50,711	Gloucester	23,329
Aberdeen	61,793	Rhondda	33,435	Dudley	20,583

Two Stores:-

Edinburgh	214,189	Cambridge	47,679	Eastbourne	30,448
Leicester	136,699	Bath	40,428	Crosby	29,854
Dundee	91,480	Exeter	40,107	Chester	29,642
Middlesbrough	78,654	Worthing	40,072	Port Talbot	25,112
Wolverhampton	75,193	Watford	37,515	Stevenage	21,211
Luton	65,753	Motherwell	35,026	Morecambe	20,475
Norwich	59,952	Scunthorpe	33,619	Falkirk	19,103
Grimsby	48,333	Hastings	33,173	Salisbury	17,736

A Note on Marks and Spencer Ltd. in Great London.

Studies of the hierarchy of shopping centres in Greater London by Carruthers [14], and Smailes and Hartley [15] make it of interest to examine the relationships between this hierarchy and the size of Marks and Spencer's stores.

Clearly distinguished in both the above studies, and of course in reality, is the West End shopping centre, which might be given the rank of one (using Carruthers' numbering). Marks and Spencer have two stores in this centre, one at Marble Arch and the other "Pantheon" in Oxford St. Whilst no definite information is availbale on their size, it is well known that these are of substantial size, probably larger than any other stores in London. Moreover the centre has more stores than any other in London.

Carruthers classification is based only to a limited extent directly on variety chains, although they are used as one of six indices for part of the classification matrix [16]. The scheme set out in table 5F is therefore only to a very limited extent the product of "feeding in the results". It

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14. W.I. Carruthers : Social and Economic Groupings as indicated by a study of Service Centres and Areas. Item 8, Royal Commission on Local Government in Greater London. pp.295-305

15. A.E.Smailes and G.Hartley (1961)

16. W.I. Carruthers, Personal Communication 1.3.1961. From data given by Mr. Carruthers it would seem that Variety Chains accounted for 5.5% of his classification.

shows a very good positive relation.

Table 5F. Carruthers' Classification *

store size (sq. feet)	3A	3B	3C	4A	Total
20,000	2	2	0	0	4
10,000-20,000	2	11	7	0	20
under 10,000	0	7	11	4	22
no store	3	1	13	38	

* Centres in Greater London S.R. + Watford and Romford.

Smailes and Hartley in contrast based much of their classification on the presence of a variety chain store in a centre, although they had no access to store size data. "The presence of a Marks and Spencer store seems to mark quite a definite step up in the equipment of a shopping centre." [17] In consequence a closer relation between rank and the presence of a store must be expected, what is less expected is the very close relation between the size of store and their grades of the hierarchy. (Table 5G)

Table 5G. Smailes and Hartley : Urban Hierarchy.

store size (sq. feet)	A	A-	B	B-	Total
>20,000	2	2	0	0	4
10,000-20,000	8	7	5	0	20
≮10,000	0	6	9	5	20
No store	2	3	3	21	

Tables 5F. and 5G. show what is a very close relationship,

17. Smailes and Hartley (1961) P.205

far closer it is suggested than we might have expected. It is significant that the stores found in centres of the 4A or B- groups are all in the smallest size category. Equally the contrast between the 'A' and the 'B' centres made by Smailes and Hartley in more qualitative terms is apparent here in quantative terms.

THE GROCERY TRADE

The trade which contrasts most completely with the variety chains is the Grocery Trade, for in its case network considerations predominate over hierarchical ones in almost every multiple organisation. This trade deals in bulk goods which require a considerable distributional network if any organisation is to make best use of any advantages it may achieve through central buying. Whilst the selection of sites is made with considerable care shops can only be located within a framework determined by their distance from the warehouse. Some organisations have decentralised their systems of supply to outlying branches, going as far as allowing some branches to purchase direct from local wholesalers. This is however rare. The relationship between branch and depot is one which has undergone several changes. Motor transport led to the first and most significant of these extending the area which could be supplied from one depot. Others of a rather more subtle kind are operating today. Economically it has been advantageous for several reasons to trade through larger sized branches. This in its turn has meant that a special trip to an outlying branch is a far more economical proposition.

Most chains with under two hundred branches are, as it will be seen, distinctly regional and indeed "local" in character. Expansion beyond this has in most cases only been achieved by amalgamations with existing chains. The exceptions are organisations like Lipton Ltd. and Home and Colonial Ltd., now parts of the Allied Suppliers Group, but which even in 1924 before amalgamation had achieved national coverages. These two were exceptional because they initially adopted a rather different type of trading to most multiple grocers, they specialised in a very limited range of products, and only operated small branch shops. Home and Colonial, Lipton and Maypole were specialists in margarine, while the International Tea Co's and Hunters the Teamen's specialisms are obvious from their names. [18]

In fact only four organisations have achieved anything approaching a national coverage:-

Allied Suppliers Ltd.	3534	branches
International Tea Co. Ltd.	1390	"
Weston Grocery Group	1211	"
Moores Stores Group	1195	"

These are over twice the size of the next purely grocery chain. The integration of the various subsidiaries is not complete. The chairman of Allied Suppliers for instance has stated on various occasions that each chain within the group competes with the others. What indirect control exists is less easy to estimate. Allied Suppliers are known to experiment in location by establishing new branches near

18. J.B. Jefferys (1950) P.145.

branches of associated companies and then comparing the results of each shop (see P. 303). Within the various groups certain structural groupings can be distinguished and it is probably true to say that there is a far closer integration of activity in these than in a combine as a whole. For instance the companies associated as Howardsgate Holdings Ltd. in the Weston Group are clearly closely integrated from their Welwyn Garden City Headquarters. In many cases however, integration does not extend much beyond financial control.

All four of these organisations have considerable interests in manufacturing. Allied Suppliers is a subsidiary of Unilever, which has special voting rights. It was in origin an amalgamation of the leading multiple companies marketing margarine. Van den Burgh and Jungens, two of the constituent companies of Unilever, had played an important role in financing the growth of the multiple organisations, in particular Pearks and Meadow.[19] The reasons why Van den Burgh added Lipton's in 1927 to its interest in Meadow (1905), and Jungens added Home and Colonial in 1919 and Maypole in 1924 to its varied interests are complex, and have been thoroughly analysed by Wilson. The results are however of interest for the enormous unit so formed contains so many branches that most High Streets contain five or six shops of the organisation. It is clear

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19. Charles Wilson, <u>History of Unilever</u>, especially Vol. 2 Cassell 1954.

that both before and after the mergers the interest of the margarine manufacturers was to maximise sales of their product, rather than simply to run retail organisations. Initially they adopted the policy of aiding the specialist multiple. After a time it became necessary to control these organisations for their cut-price sales techniques were beginning to put out of business many of the smaller, but no less important, customers of the manufacturers.

The Weston interests in grocery are influenced by two factors, one is the many opportunities which this trade has given for profitable investment, and the second is the desire of the organisation to ensure that markets for their bakeries and biscuit factories are secure. Similar considerations apply in the case of the Moores Group to its connection with Wright's Biscuits Ltd.

The form which each of these organisations takes is of considerable interest for it exemplifies many of fundamental characteristics of the geography of regailing. It will be in the main summarised in a table for each organisation (see end of sub-section).

Allied Suppliers Ltd.

There are six major groups of retail stores in this organisation. They mainly reflect the evolution of the organisation through its various mergers precediing the final acquisitions by the margarine manufacturers. The subsidiaries that have been acquired since 1929 have largely been placed in two organisations which did not exist then, Scottish Retail Investments Ltd. and Retail Investments Ltd. Since these subsidiaries have been largely regional in character, these two groups show marked concentrations in Scotland and the North-East. Vye and Son Ltd. acquired in 1959 is placed in the Lipton group largely, it might be surmised, because that group is poorly represented in Kent (figure 5C). The concentration of the other newly acquired companies in the two areas in which the network of shopping centres is most self-contained, namely Scotland and the North-East, is of interest for it shows the importance of network factors (see chapter 1.), and further shows the extent to which Allied Suppliers Ltd. is a typical cross-section of the whole trade. In fact probably 58% of the branches of the "non-national" organisations in the combine are found in Scotland and 30% in the North.

The other chains fall into two types. There are first the national chains of Lipton, Home and Colonial (figure 5D) and Maypole, and second the regional chains of Meadow (figure 5E) and Pearks Dairies. Table 5F shows data for the first two companies. Both Lipton and Home and Colonial show extensive regional variations. The latter is very poorly represented in Scotland, Yorkshire, the North-West and the North. Lipton, on the whole, varies rather less than Home and Colonial, but is very poorly represented in the North-West (only seven

Table 5H. Allied Suppliers Ltd: Major Chains.

	N	Y	NM	E	G.L.	SE	S	SW	M	NW	Wales	Scot.
Home & Colonial Ltd.												
P/E	191	219	84	63	51	39	48	71	99	193	55	246
E%	2.7	3.0	7.0	9.4	25.0	11.8	9.4	7.6	7.6	5.4	7.6	3.3
% of Multiple E.	1.8	2.4	7.3	10.2	11.8	14.2	11.8	10.2	5.7	4.1	7.9	2.3
Lipton Ltd.												
P/E	146	219	227	178	173	122	88	85	364	938	71	55
E%	5.8	5.0	4.2	5.5	12.4	6.3	8.7	13.2	4.7	1.8	9.7	24.7
% of Multiples E.	2.3	2.4	2.7	3.6	3.5	4.6	6.4	8.5	2.2	0.9	6.1	10.5
Total %	4.1	4.8	10.0	13.8	15.3	18.8	18.2	18.7	7.9	5.0	14.0	12.8

P/E - Population 1961 per shop ('000)
E% - % Establishments of the organisation in each region.
% of multiple E - Establishments of multiple organisations with over hundred branches in each region (1950 data)

branches), and unlike Home and Colonial is well represented in Scotland (its country of origin). Overall these two organisations are least significant in the North, Yorkshire, North-West and Midlands, the first two of which are areas in which the regional chains of the Suppliers are particularly active.

International Tea Company Ltd.

This organisation has a distinct regional structure, being divided into two major trading groupings: the International Tea Company and George J. Mason Ltd. The former is based on Birmingham and trades in the Midlands and the North-

West. Some overlapping occurs but since no full data is available it is impossible to state accurately its extent.

The Weston Group

In contrast to the Allied Suppliers group the Weston grocery interests have almost a completely regional structure. In fact only two of the organisations in the group trades in more than one region. These two organisations have largely achieved this expansion by the acquisition of subsidiaries trading in regions other than their core areas. In the case of Cooper and Co. this was Woodsons Stores Ltd. acquired in 1950, and in the case of Joseph Burton and Sons Ltd. it was Fearis Ltd, based on Worcester. The location of other chains in the group is fairly well distributed over the country, and in consequence there would seem to be far greater independence for the individual organisations of the combine. It is perhaps true to say that this independence is largely being lost because of the need to follow the strong lead of Fine-Fare in self-service development.

Moores Stores Ltd.

In terms of expansion this organisation shows the classic features of a "network" type of multiple. Starting from a base in North-East England in 1907 the company has gradually extended its activities over much of the country by means of amalgamations. These have been of two types. The first type has established an initial base for operations in a new area, and the second has acquired further branches in order to establish chains of sufficient size in each region. For instance Marsden was added to Frank Farrands Ltd. in 1960 in order to extend the company's coverage of the Nottingham area. In 1962 102 shops of the Mence Smith chain were acquired from Timothy Whites in order to give a more adequate number of branches in the London region, the 55 branches of the Consumers Tea Company having previously formed the bulk of the organisation's branches in that region.

Fitch Lovell Ltd.

In some cases it is almost impossible to separate the various activities of a retail group. Fitch Lovell although not purely a grocery chain, has extensive interests of the parent company. As such it is not surprising that branches of the various subsidiary companies are concentrated in South-East England, for a wholesaler must be particularly sensitive to the costs of supplying retailers. The main grocery chains are World's Stores (figure 5F.) and Green and Dyson Ltd. In all the group has nearly 700 shops.

Other Organisations.

The remaining organisations in the trade have fewer branches and simpler organisational structures than the great combines. In terms of number of branches they vary considerably, but it should be remembered that this is not necessarily a good indicator of size - the size of branches varying greatly

(it is however the only one which may be used for most analyses.) It is difficult to give any precise statement of the number of organisations which are multiples. Table 5I. shows the estimates of the Board of Trade, Jefferys and the number distinguished by this study.

Table 5I. Number of Multiple Organisations in Grocery

No. of branches	Census 1950	Jefferys	This Study
10-24	151	54	86
25-49	57	40	37
50-99	68	22	14
100+		29	21
Total	276	147	158

An additional 61 organisations contained in the combines (in this study) may have been classified in the Census as separate organisations, and a further 15 are grouped under other parent companies. These bring the total of companies distinguished by this study to 244, which means that a fairly adequate coverage of the trade has been achieved.

In general terms it is apparent that none of these smaller chains has more than regional significance. Some of the regions covered are, it is true, extensive, but even these cases are limited in number. The most significant examples of this type are Melias Ltd., Tesco Food Fair Ltd., J. Sainsbury Ltd., London Grocers Ltd., Walter Willson Ltd and Gallons Ltd. Each in its own way exemplifies interesting general rules. Melias, the largest of the organisations not classified as a combine, has extended its activities (see figure 5E.) by acquiring small existing chains in new areas, which are then gradually co-ordinated with the group as a whole. It now has five warehouses, Liverpool, Manchester, Birmingham, Cardiff and London, with 586 shops trading under 22 different names. The newer chains of Tesco and London Grocers (Victor Value) have extended their areas of operation in a similar way, albeit in a more dramatic manner. Tesco acquired John Irwin Ltd. in 1960, with a chain of 200 shops based on Liverpool specifically to extend its area of activities into northern England. Also in 1960 London Grocers, which like Tesco had originated in the London area similarly acquired Sweltenhams, a chain based on the Potteries, in order to expand in a similar way. Similar regional link-ups are rumoured from time to time for it is supremely by this method that grocery chains now grow in size.

Four other chains trading in more than one region have expanded in a more unitary manner. Three of these have a similar distribution pattern (figure 5F.). This is of particular interest when it is noted that much the same area is covered by a number of units of the combines. Walter Willson Ltd. probably has the most diffused branch pattern of any orgnaisation with a single warehouse. It has in fact achieved this only by allowing its outlying branches to purchase from wholesalers found in their immediate area. Gallons Ltd. is a more normal organisation extending its trading activities over a wide area. No specific data is available on Thompsons Red Stamp Stores Ltd., but it would seem likely that a far higher proportion of its branches are concentrated in North-East England than for instance Walter Willson.

Sainsburys, extending over a similar sized area to Walter Willson, has adopted a rather different approach to the problem of outlying branches. Almost all goods sold by branches are supplied by depots in London, branches are therefore restricted to places to which road transport can undertake a return journey within one day. This apparently is extended to include Bristol (116 miles), Derby (123 miles) and Walsall (115 miles). It is however particularly significant that all these outlying branches are situated in important shopping centres, ones in which a larger than average store size can be maintained, so making a day's transport more economical, each store requiring a full load of goods.

Other chains with over a hundred branches are more strictly regional and local in character. H.S. Budgett Ltd. is a possible exception to this, but no data is available on this company. Cullen (figure 5F.) covers a somewhat wider area than most of the others, but is very closely tied to situations where numbers of high class customers may be found. Jackson is a further example of a regional multiple. The remaining organisations are distinctly concentrated in conurbations or urban tracts (Wrensons, Thomas and Evans and Hillards are typical examples).

Almost every chain with under a hundred branches is strictly local in character, and is closely connected with a major centre of population. Wm. Low and Co. Ltd. of Dundee has branches in a fairly wide area of Northern and Eastern Scotland is an exception probably owing to the absence of much competition from other chains in that area.

The towns which are the base of more than one "local" chain (including subsidiaries of the combines) are:

London	22	Newcastle	8	Glasgow	6
Manchester	6	Liverpool	5	Nottingham	3
Birmingham	5	Hull	2	Leeds	2

Too much significance should not be given to this list, but it would suggest that those towns which are of great importance are the major cities, and those cities which are of particular significance are those which are of the highest rank, those which are rather more isolated than others, and those with port facilities. In the main, chains of "local" character trade in areas which correspond fairly closely to the community of interest of a town delimited by its third order hinterland. This finds expression in the distribution of the headquarters of organisations with fewer than 50 branches:

London	2	3A	3B	3C	3G	Others
59	15	12	5	2	9	5

Only Edinburgh, Nottingham and Derby, of the second order centres, seem to lack a chain of this size. 3B centres with chains are Lancaster, Taunton, Worcester, Newport and Chelmsford. The significance of the large industrial towns (the 3G centres) is note-worthy. Within these towns a large number of back-street shopping centres exist which means that there are plenty of suitable sites for multiple grocers, and the social structure is such that the cut-price techniques adopted by many multiples particularly suit trading conditions.

The assorted network patterns of multiple grocery organisations show clearly the many factors of significance to organisations trading in bulk goods, which largely meet demands of a "convenience" nature.

Allied Suppliers Ltd.

	Company	H.Q.	No. of Branches	Comments
1.	Home & Colonial	London	649	see figure 5D.
2.	Meadow Dairy	Long Eaton	400	see figure 5E.
	Pearks Dairies	London	500	mainly Southern England
	Broughs	Newcastle	77	North-East
	(Neale's Tea Stores, Allied Stores Ltd. incorporated in the above. J.S. Driver Ltd. and J.F. Rhodes & Sons incorporated in Meadow Dairy Co.)			
3.	Lipton Ltd.	London	468	see figure 5C.
	Vye and Son	Ramsgate	50	non Metropolitan Kent
	(Pantins Ltd., F. Ballance Ltd., C. Donnelly and Sons Ltd. incorporated in Lipton Ltd.)			
4.	Maypole Dairy Co. Ltd.	London	703	G.B. (but probably mainly S. England)
5.	Retail Investments Ltd.			
	Hadrian Supply Co.	N. Shields	85	Northumberland & Durham
	John Williams and Sons	Manchester	69	Manchester & North Wales
	W. Duncan Ltd.	S. Shields	111	Northumberland & Durham
	McConville and McEvoy	N. Shields	12	Northumberland
6.	Scottish Retail Investments Ltd.			
	Galbraith's Stores	Paisley	201	Twenty mile radius of Paisley
	R.&J. Templeton	Glasgow	105	Probably mainly
	A. Massey & Sons	Glasgow	90	Lanarkshire and
	Cochranes Ltd.	Glasgow	146	Ayrshire.

International Tea Co. Ltd.

Company	H.Q.	No. of Branches	Comments
1. International Tea Co.			
International	London	547	mainly S. & E. England
Ridgways	"	11	
P.W. Agate	" *	72	Home Counties
F.W. Essex	"	27	London
Harvey and Shillingford	"	5	"
S.J. Kilby	" *	31	Home Counties
R. Orme & Co.	Bakewell	14	Derby & S. Yorks.
Payantake Stores	"	37	London
John Quality	London *	25	"
Underwood & Co. (Plymouth)	" *	11	Plymouth & District
W.B Moss	Hitchin	14	Herts & Beds.

(* These companies have H.Q. at the International Tea Co.)

Company	H.Q.	No. of Branches	Comments
2. George J. Mason Ltd.			
Mason	Birmingham	502	West Midlands, Liverpool & Wales
James Pegram	Liverpool	87	Merseyside
Taylor & Co.			
Direct Trading Co.	included in Mason		
Star Tea Co.			

The Weston Group. (Grocery Traders)

Company	H.Q.	No. of branches	Comments
1. Companies with non-grocery interests:-			
Thomas Scott	Liverpool	76	Liverpool & Area
Arthur Davy	Sheffield	44	West Riding
Empire Stores	London	10	London (associate of Aerated Bread Co.)
Stewarts Cash Stores	Belfast	104	N. Ireland
Hudson Bros.	London	28	Home Counties (associate of Peter Keevil Ltd.(wholesalers)
Fortnum and Mason	London	1	
2. Howardsgate Holdings Ltd.			
Fine-Fare	Welwyn Garden City		
Forrest Stores	Shere (Surrey)	57	South Home Counties
J. Burton	Nottingham	200 +	East & West Midlands
L.H. Fearis	Worcester	?	Midlands & SW (Associate of J. Burton)
3. J. Shentall Ltd.			
J. Shentall	Chesterfield	74	S. Yorks. & North East Midlands
F. Woodhead	Chesterfield	19	(incorporated in Shentall)
4. Cooper and Co. Stores Ltd.			
Cooper	Glasgow	187	Scotland, Liverpool & some in London
Woodsons Stores	Birkenhead	34	Merseyside
L. and N Stores	Newcastle	111	North-East & North
5. Others			
F. Brown	Bolton	28 +	S.E. Lancashire
A. Hanson	Pudsey	24	Bradford
Williams Stores (Clarks)	Woolwich	30	London & Kent

Moores Stores Ltd.

Company	H.Q.	No. of Branches	Date Acquired	Comments
1. Moores Stores Ltd.				
Moores Stores	Newcastle	173	1907	Yorks, Durham & Northumberland
E.H. Askew	"	24	1955	N.E.
Burgons	Manchester	76	1949	Lancs. & Cheshire
Sellers (the food sellers)	"	12	1954	"
T. Seymour Mead	"	97	1954	"
Hunters The Teamen	"	35	1955	Lancs.
Frank Farrands	Nottingham	57	1949	Nottingham
Hay & Co. (Edinburgh)	Edinburgh	56	1945	Scotland
Rowntree	Scarborough	15	1960	Scarborough
S.G. Moss	Ripon	5	1957(?)	N. Yorks
Marsden	Nottingham	82	1960	Nottingham & District
Consumers Tea Co.	Bedford	15	1961	Bedford
U.K. Tea Co.	London	55	1960	Home Counties
Mence Smith	Peckham	102	1962	" "
Shaw Bros. (Grocers)	Romford	6	-	London
Taylor Bros.	Romford	40	-	London & Essex
Briscoe	West Bromwich	15	-	Staffordshire
Garon	Southend	51	1961	Southend
2. Wright's Biscuits Ltd.				
J. Duckworth	Rochdale	167	-	S.E. Lancs & S. Yorks
Wallaces	Huddersfield	20	-	Huddersfield
Thrift	Leeds	151	-	Leeds

Large Multiple Grocers.

Company	H.Q.	No. of branches	Comments
Melias	Liverpool	586	see figure 5.E
United Dairies	London	475	Home Counties
Tesco Food Fair	"	387	Southern England & S.W. Lancs
	(associates John Irwin & Harrow Stores)		
Express Dairy	London	319	Home Counties
Sainsbury	"	262	see figure 5.F
Gallons	Leeds	241	see figure 5.F
Greig	London	230	Home Counties
London Grocers	"	223	Home Counties & Stoke
	(associates, Sweltenhams, Victor Value & Goodworths)		
Walter Wilson	Newcastle	193	see figure 5.F
Thomas & Evans	Newport	187	South Wales
Cullen	London	157	see figure 5.F
Williams Bros.	London	135	Home Counties
Direct Supply Stores			
Hilliards	Leeds	132	16 miles radius
Thompsons Red Stamp	Gateshead	123	N.E. England
Wrenson	Birmingham	121	10 miles radius
Jackson	Hull	120	see figure 5.F
H. & S. Budgett	Bristol	100+	South-West
Ross Dairies	Glasgow	100+	mainly Glasgow

Large Medium Multiples

Worthington's Cash Stores	Leicester	88	Leicester, Warwick & Northants
Pybus	Middlesborough	80	Teeside
Wm. Low	Dundee	75	Scotland
Redman	Manchester	70	Lancs., Yorks & Potteries
Frost	London	69	Home Counties
Phillips	London	66	Home Counties
Yardleys London & Provincial Stores	London	63	Home Counties
Marsh & Baxter	Brierley Hill	60	West Midlands
Cussons	Hull	55	Yorkshire
		(associated with J.C. Carline)	
Hawkins	London	50	W. London
Gunn	London	50	Home Counties
Favours	Whitley Bay (associated with Meesons)	50	N.E., Manchester & Birmingham

OTHER FOOD.

The trades included in this category (food traders other than grocers) are ones in which multiple organisations have relatively few advantages over independent retailers. Geographically this means, that apart from one or two particular special cases, that branches are mainly found in those areas which are generally most favourable to multiple organisation, namely the conurbations.

In the Butchery Trade there are rather more multiples than in most of the trades of this group. This is partly the result of the special character of the produce which led to the growth of the two largest organisations in the trade, organisations which are far larger than almost any others in the trade group. These organisation, the Union Cold Storage Ltd. and Baxters Ltd. (London Central Meat Co. until 1958) developed to distribute imported produce, which at the turn of the century was difficult to market successfully. The distribution of the branches of these two organisations is also a reflection of their origin for Jefferys considers that at first there was a distinct antipathy to imported meat amongst housewives in "Yorkshire, the Northern Counties, the South West, Wales and particularly Scotland".[20] Baxters still

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20. Jefferys (1950) P. 190.

largely trades south of a Humber-Mersey line. This, since it has 400 branches, emphasises the contrasts between multiple organisations in food and those trading in other commodities. Baxters consider for instance that there is still "plenty of scope in the areas where we have shops". [21]

Smaller organisations are almost all based on, and are largely resticted to, the conurbations. The butchery branches of the Fitch Lovell group (see P. 215) are all found near to London. A count of 59 multiple organisations shows that London has 21, Glasgow 6, Birmingham 5 and Leeds 3. The only exceptions to this concentration on the conurbations would seem to be:-

L. Edwards Ltd.	56 branches	Lancs, Cheshire & West Midlands
L. Maunder Ltd.	10 "	Cullompton
W. Valentine Ltd.	10 "	Inveruries
L.C. Roberts Ltd.	11 "	Colwyn Bay

The other multiple organisations are found in large towns. Their distribution in relation to the size of these towns is as follows:-

Size of Town	No. of Organisations
over 250,000	13
100,000-250,000	5
50,000-100,000	3
25,000-50,000	1

Multiple greengrocers are both less numerous and smaller

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21. W.J. Baxter Esq. Managing Director, Personal Communication.

in size (i.e. number of branches) than butchers. The Board of Trade distinguished only twenty-five organisations, only fifteen of which have been traced by this study (most organisations are small which makes the task of tracing them a difficult one). Once again the most significant feature of the distribution of these organisations is their location in the conurbations. Seven are based on London, two on Liverpool. and one each on Manchester, Glasgow and Hull. All these are largely confined to their respective conurbations. Only two appear to extend far from a single conurbation. James Waterhouse Ltd. is the most significant of these, having branches in Cheshire, Lancashire, Shropshire and North Wales. The other is William Strike Ltd. of Hull, which is a florist and seedman and has branches in Yorkshire, Teeside and Co. Durham. The largest orgnaisations in the trade are:-

	Branches	Area
T. Walton Ltd.	100+	London & Home Counties
F. Meyers Ltd.	110	Acton
G.M. Gerrards Ltd.	90	Southall
James Waterworth Ltd.	65+	Liverpool
M. Campbell Ltd.	36	Glasgow

In Fishmongery the Board of Trade only found eleven multiple organisations. Only four have been distinguished here. Two of these are restricted to London and a third to Liverpool. The fourth MacFisheries is one of the largest multiples trading in the Other Food trades. In 1961 it had 410 branches, whereas in 1950 there were only 555 establishments of all multiples in this trade. This large number of branches means that it may be termed a "national multiple", but a detailed examination of the distribution of its branches shows that this has far greater regional variations than the typical organisation of this type (table 5J.). There is a marked concentration of branches in Southern England. This

Table 5J. MacFisheries Ltd: Population Per Shop (A) and No. of Fish Shops (1950) to a branch (B)

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
A.	542	596	242	121	57	57	72	92	205	252	440	323
B.	83	93	34	13	13	15	12	12	18	34	22	77

is partly a reflection of the general distribution of fish shops, which in turn both reflects and influences the consumption of wet fish. Only a small part of the north-south contrast may be attributed to this however, as table 5J. shows quite clearly. No direct conparisons between the distribution of MacFisheries' branches and those of other multiple fishmongers are possible. Table 5K., based on the 1961 branch list and the 1950 Census, shows that the proportion

Table 5K. Percentage of Multiple Fishmongers accounted for by branches of MacFisheries.

N	E	L	SE	M	NW	Scot.
75	119	60	83	77	65	49

varies considerably. The figure of 119% in the East is anomalous for MacFisheries have built numbers of new branches in that region since 1950. It has 31 branches there, whereas there were only 26 branches of all multiples in 1950.

MacFisheries' concentration in Southern England is apparent from the table but such high proportions as 75% in the North should be noted.

A high proportion of towns which have high rank in the urban hierarchy have branches of MacFisheries :-

	2	3A	3B	3C
No. of centres with at least one branch	14	21	20	36
Total no. of branches	41	32	26	50
No. of centres in the class	18	23	26	61

The centres of the second order which do not have a branch are Stoke, Derby and Dundee (all "pseudo" centres), and Aberdeen. The 3A centres without branches are Sunderland, and significantly Hull; the 3B centres are the four Welsh towns, Bangor, Caernarvon, Carmarthen and Aberystwyth, Boston and Lancaster.

The distribution of the remaining shops emphasises the overall regional pattern of the organisation. The majority of the towns of 3C rank which have no branch are found in the north, while most of the remaining shops are in the south (Table 5L.). It is interesting to note that eleven

Table 5L. MacFisheries Ltd: 3C centres without a branch (A)
Branches in lower ranking centres (B)

	N	Y	NM	E	SE	S	SW	M	NW	Wales
A.	6	1	3	4	1	1	0	2	3	5
B.	1	1	4	11	28	14	12	7	10	4

of the twenty-six 3C centres without a branch could be described as ports, including the major fishing ports of Grimsby, Yarmouth, and Lowestoft. Clearly there are few advantages available to a multiple organisation in this type of town.

MacFisheries is so much larger than any other multiple in the trade almost entirely because its growth was initially linked with the philanthropic work for the crofters of Lewis and Harris conducted by Lord Levershulme. It was planned as a marketing agency for the fish caught by these men. 360 shops were bought to form the basis of the company in a very short time (February 1919 to the end of 1921). It is widely believed that large-scale organisation in fishmongery is only possible by some such purchase for the complex distribution network required for a commodity as perishable as fish is only economical if it serves a large number of shops. The geographical distribution of MacFisheries branches gives support to this view for it extends in a rather more hierarchical pattern than a regional one, something which is unusual in the food trades.

CHEMISTS.

Twenty-eight organisations were classified by the Board of Trade as multiple chemists; Jefferys estimated that there were 25 in 1950; and this study has been able to distinguish 23 by name in 1962. These are however, dominated by two major chains. Boots (Cash Chemists) Ltd. has approximately 1300 branches and Timothy Whites has over 600 chemists branches. Only two other organisations have more than fifty branches, and only a further five have over twenty-five branches.

The smallest multiple organisations are strongly concentrated in conurbations; nine are found in London, three in Birmingham, two in Bristol, two in the Potteries, and others are found in Hull, Middlesborough and Glasgow. However, the remaining organisations are more randomly situated. Indeed the actual situation of branches of most organisations shows that the ties of network factors are not great in determining locations. [22] Even the organisations based on conurbations have branches in towns situated at considerable distances from the head office. Bannister and Thatcher Ltd. for instance has branches not only in Birmingham but also in isolated clusters in South Wales and South-East London. These clusters are significant for it would be uneconomical to

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22. This trade was compared with opticians during the research, a trade which was found to show little regionalisation in branch location.

establish isolated branches. A cluster allows control to be decentralised into the hands of an area manager whose relatively high salary may be fairly readily borne by several branches.

The towns outside the conurbations in which branches are found follow little pattern, proximity to the conurbation being of far greater importance than hierarchical significance. Some organisations based on London, catering essentially for a high class customer, have branches in towns where it is reasonable to expect numbers of this type of customer. Thus Heppels Ltd. has branches in Brighton, Bognor Regis, Torquay and Ipswich; Arnold M. Gee Ltd. has branches in Windsor, Winchester, Camberley, and Cobham; and H.W. Herbert Ltd. has branches in Bagshot, Byfleet and Camberley.[23] Savory and Moore Ltd., the organisation which covers the most extensive area, has branches in most towns of Southern England in which customers of this sort can be expected. Indeed the regional distribution of these multiples supports the conclusion that in the main they are specially orientated to areas with large numbers of high class customers. Table 5M. shows that they are strongly concentrated in the more wealthy

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23. The branches listed for these three organisations are the only branches outside Greater London run by organisations based there other than Harleys (Chemists) Ltd. of Colne (with six branches) which is a subsidiary of William Fox and Sons, and Savory and Moore Ltd.

regions. The reason for these general trading policies is

Table 5M. Distribution of Branches of Multiple Chemists 1950 (other than large multiples).

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
No.	23	12	-	15	199	25	14	78	73	23	5	18
%	4.8	2.4	-	3.1	41.3	4.9	3.0	16.1	15.6	4.8	1.1	3.7

that a manager of a chemist's shop has to be a qualified man, someone who does in fact demand a fairly high wage.[24] This necessitates a high turnover, something which is most easily achieved by concentrating on goods other than medicines which are the special demand of the higher income groups.

The two large organisations in the trade are very different to each other in many of their major features. Boots Ltd. is an organisation mainly of organic growth which has extended gradually until it now has a very full national coverage. Four companies were acquired in the early years, but these acquisistions were all before 1911.[25] Boots only had 544 branches in 1913. It has the major characteristic of a full national multiple that the population per shop ranges only from 5,630 in Yorkshire to 3,110 in the South East. The coverage is so full that there are now few shopping centres

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24. Minimum of £12.14.0d per week for a qualified man outside London. Times, Rates of Wages and Hours of Work op cit P.215.

25. See R.S. Edwards and H. Townsend op cit. paper by F.A. Cockfield, Chairman of Boots PP.116-128.

in which the company is not represented. Timothy Whites and Taylors on the other hand is a combination of various companies formed in 1928. This combination is still apparent in its branch distribution, which reflects the importance of Taylors Drug Co. in the West Riding, of Taylors (Cash Chemists) Midland Ltd. in the West Midland Conurbation, and of Taylors Cash Chemists London Ltd. in the metropolis. These three companies are the constituent companies of the organisation today, and are a reflection of its history. The result of this evolution is that Timothy Whites is today represented very fully in the area surrounding these three nuclear areas but is rather poorly represented elsewhere in comparison with Boots (figure 5G.). Thus in Wales there are only eight branches, in Scotland sixteen and in the East only thirteen. In Yorkshire in contrast there are more branches of Timothy Whites than Boots.

The relationship between the branches of these two companies and the rank of towns depends mainly on the region which is being considered. Their large number means that almost everywhere there is a full coverage of centres of fourth order rank or higher. There is however, a distinct tendency for Boots to penetrate far smaller and less significant places than Timothy Whites, especially in those regions in which the latter is not so well represented. This corresponds fairly well with traditional views on how multiple organisations situate their branches.

The towns which have more than one branch of one or other of the two companies are numerous, far more numerous in fact than those with two Woolworth stores. Boots in fact has more than one branch in 98 towns outside Greater London. These towns are however, heterogeneous in character, and many changes are taking place within the distribution pattern. These changes are in the main the result of a policy which favours large stores. In 1959 it was stated that in real terms, the average turnover per shop had doubled over pre-war.

Timothy Whites is similarly undertaking a redevelopment scheme of its branches. In its case this is rather more drastic involving the closing of large numbers of small shops and the opening of larger stores (Table 5N.). The precise implications of this to the distribution pattern is not clear, but in general a considerable concentration of trade in the major centres must be taking place.

Table 5N. Timothy Whites and Taylors Ltd. Branch - shop changes.

Date	Openings	Closures
1956	11	31
1957	10	20
1958	5	23
1959	5	50
1960	3	47
1961	2	11
Total	36	182

THE FURNITURE TRADE

One organisation dominates multiple retailing in this trade. Great Universal Stores, with 420 branches in its "Household stores" division and 200 branches in its "Sales-Collector" division, has more branches than the total for all other organisations of large medium or large size. The number of multiples operating in this trade is difficult to estimate, and indeed to classify, for much overlapping of trades exists with traders dealing mainly in commodities other than furniture. Table 5.0. shows various estimates of these numbers.

Table 5.0. Multiple Organisations in Furniture Trade.

Organisations	Census 1950	Jefferys	This study
Small	30	19	21
Small medium)	5	1	8
Large medium)		1	4
Large		1	4
Total	35	22	37

The eight organisations with over fifty branches are:-

Great Universal Stores	620	Clydesdale Supply Co.	83
Ridings Stores	111	Phillips Furnishing Stores Ltd.	75
New Day Furnishings	103	Hardy and Co.	67
John Blundell Ltd. (United Drapery)	101	Times Furnishing Co.	50

The Great Universal combine (figure 5H.) trades under many different facias, but although repeated statements in annual reports are made by Woolfson that: "shops and stores compete with each other, and with other divisions of the group", there would appear to be considerable overall direction of the construction and acquistion of new branches. Some of the main names under which the organisation trades are Cavendish, Campbells, Jays, Jacksons, Woodhouse and Smarts.

The distribution of the branches of G.U.S. is determined by two major factors. A multiple furnisher is mainly concerned with a working class market. Branches are therefore found whenever sufficient numbers of working class people congregate. This firstly means those towns which are important shopping centres. The relation between the hierarchy and branches of G.U.S. is close:

	2	3A	3B	3C
Towns with shop	18	23	24	52
All towns	18	23	26	62

Branches are however particularly concentrated in the cities of the second rank of the hierarchy, for these are usually the centre of large industrial groupings of population. In fact these towns had 126 of the 620 stores, which is equivalent to 23% of the branches outside Greater London (these towns had only 17% of the population). As most of the shops found in these towns are larger than those found elsewhere, the proportion of sales which they account for is far higher than 23%. The towns of third order status without a single G.U.S. shop are of interest:-

3B centres: Tunbridge Wells; Aberystwyth.
3C centres: Banbury; Kings Lynn; Bury St. Edmunds; Yarmouth; Dorchester; Chichester; Oswestry; Rhyl; Stafford; Durham.

Since all these towns serve as shopping centres for extensive areas, the absence of stores is mainly due to one of three factors: first, trade is lost to nearby second or important third order centres; second, that the expenditure on furniture of rural working class families is lower than that of the urban working classes; and third, that a higher proportion of whatever trade that does exist is taken by the general department store in towns of this type.

The second major feature of the distribution of branches is that there are distinct regional concentrations in those areas where large working class populations are found (Table 5P.). This is particularly noticeable in Wales where there are only 39,000 people to each branch of the organisation, and particularly in Glamorgan and Monmouth where there are only 31,540 people per store.

Table 5P. Great Universal Stores : Distribution of Branches.

	N	Y	NM	E	G.L	SE	S	SW	M	NW	Wales	Scot.
A.	51	77	53	25	63	26	32	37	65	71	68	52
B.	63	54	69	182	129	112	112	92	73	94	39	100

A. = No. of branches
B. = Population per branch ('000).

These regional contrasts naturally influence the typical type of shopping centre in which shops are found. In the industrial areas almost every fourth order centre has at least one store. In the more rural counties however, stores in fourth order centres are in the main limited to 4A centres, for the population required to support a shop of this type in these areas, where trading conditions are not so favourable, is not found in lower ranking places (Table 5Q.).

Table 5Q. Great Universal Stores : Distribution in Certain Regions in Fourth or Lower Order Centres.

	South West	South	South East	East
4A	5	2	4	2
4B	-	-	3	1
4C	-	-	-	-
Other	-	-	1	1

The centres in the four southern regions not ranking as 4A places are either resorts or Outer London suburbs (the two places not ranking at all, being the Crawley and Romford). In the four rural counties of Cumberland, Shropshire, Hereford and Worcester no stores are found in towns of lower than the third order, and in a fifth, Lincolnshire the only places of the fourth order stores are located in Gainsborough and Spalding, both important 4A centres.

The features which characterise G.U.S. are true to a lesser extent for the smaller multiple organisations listed above. The hierarchical pattern is of less importance, however, in most cases for the largest markets are found in industrial regions, and even within these, as it will be seen, there is a fair degree of independence in location, for in the majority of cases a trip to buy furnishings is a very important occasion in a family's life, one which warrants a special shopping trip to a particular store.

The actual distribution of the branches of these organisations is shown in figures 5I. and 5J. and is summarised in table 5R. The majority of these branches are found in the North West, the North, and in Scotland, and that apart from

Table 5R. <u>Multiple organisations in Furnishing with over 50 branches</u>

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
Times	-	1	-	4	37	2	1	-	1	4	-	-
New Day	13	6	9	6	3	-	2	2	13	36	-	8
Phillips	17	9	4	1	-	1	3	3	4	12	10	1
Hardy	27	4	5	2	3	1	1	2	6	7	-	9
Clydesdale	4	5	-	-	-	-	-	1	15	4	-	54
Blundell	9	4	7	11	14	2	7	8	10	12	-	-
Ridings	22	9	4	-	-	-	-	-	6	70	-	-
Total	92	38	29	24	57	6	14	16	55	-	10	72

one organisation, the Times Furnishing Co., there are few branches in London and Southern England. The actual situation of the branches shows that very wide areas may be covered by a single organisation, although in most cases this wide spread is the result of financially, rather than geographically, induced amalgamations. All the six organisations trading away from London are the result of complex series of amalgamations.

The relation of the shops of these organisations to the urban hierarchy is not marked, even in those regions in which they are well established. In many areas there is little relation between the various companies. For instance in the North the distribution of the branches of these organisations may be summarised as follows:-

No. of Organisations.	All	5	4	3	2	1	Total
No. of Towns in which branches are found	1	0	5	10	7	6	29

Only Newcastle has a branch of all the organisations. Shopping centres as significant as Sunderland and Middlesbrough have a branch of only four of the organisations, while other places with a similar number are Crook, Whitley Bay and Chester-le-Street. The relation with the hierarchy is not great.

Organisations which have fewer than fifty branches (figures 5K. and 5L.) show distinctly regional characteristics. There are some exceptions to this generalisation, but these are few in number. Two such exceptions are Court Bros., a London firm, with two branches in Scotland, and James Grant Ltd., a Glasgow based firm, with a branch in Doncaster. While the location of the headquarters of an organisation may be somewhat fortuitous, depending in the main on the origin of a particularly successful organisation, the actual resultant pattern of branches is fairly predictable, given the characteristics of an area. Thus the isolation of the two organisations based in North-East England (Doggarts Ltd. and Smiths Ltd.) is only a reflection of general geographical conditions. Equally the great extent of the areas covered by some organisations based on London is only a reflection of the importance of the metropolis in English life in general. In fact London houses the headquarters of nearly half the organisations of this size (44% of them by number of branches). This is also a reflection of the relatively poor penetration of the city by the largest organisations, and of the rather different type of working class market found there.

Two organisations have not been placed on fig.5K. They are however shown on figure 5J. The most important of the two is Maples Ltd. which is a very different type to most other multiples in the furniture trade, and is in fact rather more comparable with a Department Store chain. It has sixteen shops, which are either found in second order centres or in important third order centres in the south, which have considerable custom for this type of trade. Even so the relatively low rank of these cities finds expression in the 1962 Chairman's report:

"At Bournemouth we have not done so well...it is worthy to note however, that the aggregate turnover and profit of Southampton and Bournemouth have achieved an appreciable increase, and this may prove that the initial impact of the acquistion of Southampton affected th Bournemouth branch to some extent."

The evolution of the chain illustrates its exceptional character, for having been founded in London in 1841, it had branches in Paris (1905) and Buenos Aires (1906) before any other town in Great Britain, and it has been really only since 1945 that most of its provincial branches have been acquired.

The second exceptional organisation is Charles Hall Ltd., and its subsidiary Henry Jacobs Ltd., which as figure 5J. shows has most of its branches in Northern and Eastern England, and was originally based on Hull. It now has branches in Stevenage, Harlow, and Bracknell with its headquarters in Kensington. Despite these developments in the south no branches have been established in Greater London for trade there: "is entirely different...which makes a great deal of difference to us in the control of our goods and the collection of our debts." [26] The London location of the headquarters is determined by the advantages which exist there for acquiring finance for hire purchase trading.

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26. Personal Communication, Managing Director, February 1962.

WOMEN'S WEAR

Nineteen multiple organisations with over twenty-five branches distinguished by name have been found to be operating in this trade. As the Board of Trade found twenty and Jefferys fourteen, this constitutes a fullish coverage. The Board of Trade did not distinguish organisations by size. Jefferys, on the other hand, found four large multiples whereas six are found in 1962. Documented changes which have taken place during the last twelve years can account for these variations (Scotch Wool Co., Morrisons and Willsons have over a hundred branches at each date; Vogue (a subsidiary of G.U.S.), Dorothy Perkins and Kendall have grown from large medium size to large; whereas Swears and Wells Ltd. has reduced its number of branches by over half. Jefferys found seven large medium organisations which is one fewer than those distinguished by this study, and only three small medium, which is two less than this study.

The distribution of the branches of these organisations is in the main hierarchical. This finds its clearest reflection in the relatively small size of the organisation which achieves a national coverage of the higher ranking towns (Table 5S.). C. & A Modes Ltd. has been found by Smailes and Hartley, [28]

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27. General background information may be found in Margaret Wray, The Women's Outwear Industry, Duckworth 1957.

28. Smailes and Hartley (1961) P. 206.

to be one of the major elements by which 'A' rank centres may

Table 5S. Selected Multiples in Women's Wear & The Hierarchy.

Organisation	2A	3A	3B	3C	3G	London	Others	Total
C. & A. Modes	12	6	2	-	-	11	-	31
Swears & Wells	15	11	3	7	1	9	1	47
H.J. Wilson	10	7	6	3	6	13	-	45
Richard Shops	13	13	9	13	4	25	4	81

be distinguished from lower ranking places in London. This is clearly true for towns elsewhere. The only towns of the second order in which there is no C. & A. store are the "Pseudo" second order centres (other than Leicester). The 3A centres which have a branch are a very special group, with particularly high shopping densities, being Hull, Middlesbrough, Preston, Southampton, Bradford and Swansea. This is also true for the remaining two branches - Portsmouth and Newport. These eight towns are in fact eight of the fourteen largest centres of 3A, 3B or 3C rank.

Swears and Wells Ltd. are of particular interest in view of their closure of nearly half their branches in the last fifteen years. This rationalisation has left the present pattern fairly closely parallel with the hierarchy. There is a branch in every second order centre except Stoke, Derby and Leicester. The rather large numbers of shops found in centres of 3C rank is intelligible if it is noted that five of the seven centres are Bournemouth, Eastbourne, Blackpool, Southport and Southend (a fairly good example of a special market orientation).

Other small organisations like H. & J. Wilson Ltd (with its subsidiary Eve Brown Ltd.) and Wallis follow the divisions of hierarchy rather less closely but still aim at a coverage of the most important centres. Particularly large numbers of shops in certain groups of towns indicate a special concern for a particular type of trade.[29] In the case of H. & J Wilson large numbers of shops in the 3G group are one such concentration.

Large medium organisations are in general no more national than the organisations mentioned above. Indeed the Hosiery Manufacturing Co. is largely restricted to Scotland, the Provident Supply Co. to Northern England and Dupont Bros. to Southern England. Five "national" organisations exist. They are Richards Shops Ltd., Etam Ltd., Barnett-Hutton Ltd. and, in England and Wales only, Jax Ltd. and Bellman Ltd.

An example of a regional organisation of this size is Dupont Bros. which is limited to Southern England. Within this trading area it follows the urban hierarchy quite closely, and the only branches not in the area[30] are in high ranking centres on its edge (Nottingham and Derby). Table 5T. shows this

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29. The Women's Wear trade is probably the trade in which the 'market' is most strongly divided.

30. Bounded by and including Dorset, Somerset, Gloucester, Worcester, Leicester, Huntingdon & Parts of Holland.

Table 5.T. Dupont Bros. Branches in Relation to Hierarchy in Southern England

	2	3A	3B	3C	4A	Others	London
Branches	6	10	11	12	6	9	10
No. of centres in region	6	11	14	30	38		

close relationship. The nine places indicated as "others" are a mixed group of settlements, some being new towns like Harlow, others 4B centres like Saffron Waldron and Berkhamsted, and others are suburbs like Waterlooville.

Richards shops (fig. 5Q.) with 81 branches, are a national organisation. Its major features are paralleled by the other national organisations of this size. A combination of regional and hierarchical distributions is the most important feature. In this case ten of the twenty-nine shops in centres ranking lower than 3A are located in the Home Counties, where market conditions are most favourable. As in the case of Swears and Wells ten shops are located in resorts, while other shops are located in towns which have been found to be under-rated by the use of bus route criteria - Newport, Wolverhampton and Portsmouth. Two branches are located in towns which might have warranted higher rank for other reasons - Taunton and Yeovil.

Even large multiple organisations are rarely fully national.[31] The area in which an organisation originated

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31. Branch lists are only available for Dorothy Perkins Ltd. and Scotch Wool Co. There are four other large multiples.

is usually distinguishable by the presence there of a high concentration of branches. Indeed Dorothy Perkins has 118 out of its 169 shops in Southern England (figure 5.M.). In this case the unbalance is of special interest for Perkins is one of the organisations most likely to expand to full national status in the next decade (its headquarters is being organised to cater for 500 branches). The present concentration of shops in Southern England is equivalent to one shop to 178,000 people, as against one to 592,000 in northern England (a further 120 stores could be added to the chain in the north without surpassing the present southern density.). Table 5U. sets out the relationship between the number of centres and branches in the two areas.

Table 5.U. Dorothy Perkins Ltd: Relation of branches to the Urban Hierarchy.

		2	3A	3B	3C	3G	4A	Others
North	No. of branches	9	7	1	5	2	5	7+9 (Stoke)
"	No. of centres	14	13	8	27	17	-	-
South	No. of branches	3	9	9	18	-	12	15
"	No. of centres	4	14	18	35	0	-	-

The evolution of this chain can be examined in detail, and makes an interesting case sample. In its early years, in contrast to the Variety Chains, regional ties were great. Starting from a shop in Wood Green in 1916 it was 13 years before a shop, the thirteenth of the chain, was opened outside London, in Slough. Indeed even in 1938 there were only seven branches outside London - Slough, Walton, Guildford, Watford, Birmingham (2) and Reigale. In November 1938 a chain of sixteen shops was acquired from J.H. Greenwood Ltd. in the Potteries, hence the rather greater density of branches there than elsewhere in the North. Other branches were established, as might be expected in major centres like Bristol, Reading and Northampton in 1939. No further branches were added until 1944-5 when shops were opened in Luton, Banbury and Leicester, which conform to some extent with the pattern of important shopping centres. Since 1946 expansion has been more rapid with branches being established in towns of varying importance, and without any marked concentration in particular types of town or area at different stages of growth (Table 5.V.). In the first six years branches were established in towns as separate as Rochdale, Exeter, Ipswich and Shrewsbury.

Table 5.V. Dorothy Perkins Ltd : Shop Openings.

Period	Total	No. Per Year	2	3A	3B	3C	3G	Others	London
1946-51	16	2.7	-	5	3	2	3	3	-
1952-55	16	4.0	3	3	1	4	-	3	2
1956-58	22	7.3	1	2	4	3	-	10	2
1959-61	38	12.7	4	4	1	8	-	15	5

The Scotch Wool Co. (figure 5.N.) with 360 branches, is a more regionally balanced organisation. It was established far earlier, in 1881, as Fleming, Reid and Co. Ltd. The regional variations which do exist are relatively small, being marked only in Scotland (the region of origin) and the South

East. The concentration in the latter region is not easy to explain, and may be partly due to the higher purchasing power of the population of that region. Branches of the company

Table 5.W. Scotch Wool Company : Distribution of Branches.

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
No.	19	19	13	25	39	37	23	20	20	35	16	67
P/E('000)	171	219	279	149	209	79	123	171	238	188	165	77

are found to have a fairly close relation with the urban hierarchy (Table 5.W.). All the second order centres except

Table 5.X. Scotch Wool Company : Relation of Branches to Urban Hierarchy.

	2	3A	3B	3C	3G	4A	4B	Others
No. of centres with one branch	16	23	24	55	13	41	23	15
No. of branches	44	26	26	58	13	41	23	15

Stoke and Leicester have a branch, the two 3B centres without branches are Aberystwyth and Caernarvon, and the 3C centres are a varied group, in which in many cases trading conditions are marginal for the company - Rhyl, Pontypridd, Bishop Auckland, Durham, Oswestry, Dorchester and Scunthorpe. The 3G centres which do not have a branch are all found in Yorkshire. The remaining branches are found in a variety of places, with there being a particular concentration in the 4A centres (41 out of 109 of this type).

Small multiples in the Women's Clothing Trade are numerous, and particularly difficult to trace, for each branch shop of many traders may be under a different name. Jefferys found 14 in 1950 and the Board of Trade counted 30, a far larger difference than most other trades. No attempt has therefore been made to trace all these organisations. Six organisations have been examined :-

John Vickers Ltd.	11	Brighton
Rose's Fashion Stores Ltd.	13	Bedford
Crook & Sons Ltd.	14	London
Channelle Ltd.	12	Bournemouth
Shirley Bros. Ltd.	10	London
Arthur Bennet Ltd.	20	Reading

These show that branches are located at quite large distances from each other, while they are limited to Southern England. There are some advantages to these "Madam" type shops in such a dispersion for it ensures that the "stigma" of multiple status is minimised, and it is easy to transfer goods which have not proved successful in one branch to another in a completely different area.

MENS WEAR

In all multiple organisations account for 23% of the establishments and 39% of the sales of this trade (the share of multiples in womens wear is 8% and 30% respectively). The share of large multiples is particularly great in this trade (57% and 55% of the multiples' share).

In general hierarchical considerations dominate the selection of situations for branch shops. This even applies to organisations with fewer than ten branches. Small multiple organisations, which numbered fifteen in the Board of Trade's survey and thirteen in Jefferys survey, have a fairly wide-spread distribution pattern. This pattern is either one following the highest ranking towns in the hierarchy, or else one in which a number of towns with particularly large numbers of male customers is important (towns like Camberley, York and Oxford). Table 5.Y. shows these patterns for a number of organisations.

Table 5.Y. Relation between branches of some companies and the Urban Hierarchy

	2"Full"	2"Pseudo"	3A	"Special"*	Others	London	2(Scot.)
Austin Reed	6	3	4	3	0	11	2
Horne Bros.	6	1	0	3	4	10	0
Moss Bros.	6	1	2	4	1	1	2
Allkit	0	0	1	6	4	1	0
Willerbys	7	7	5	1	4	36	3
Total no. of towns	7	7	23	9	-	-	4

* These towns are Aldershot, Bournemouth, Brighton, Camberley, Chester, Exeter, Harrogate, Oxford and York (i.e. towns in which at least two of the companies have a branch).

Some small medium multiple organisations have a regional character, thus largely departing from the hierarchical pattern of the smaller and larger companies. They are:-

	No. of branches	Region
Crooks (Mens and Boys Outfitters)	36	Lancashire
George Doland	30+	Home Counties
John Manners	41	Midlands & North
Smart Weston	34	South
Hodges and Sons	39	Wales & West

They cover rather less extensive areas than the corresponding organisations in women's wear.

The larger organisations have both regional and hierarchical distribution patterns. An important distinction here should be made between the bespoke tailors, which mainly have a hierarchical distribution, and the general outfitters and clothiers which generally are more regional. This distinction is important when examining the location of headquarters for seven out of the eight organisations of the first type have their central offices in Leeds, and out of the seven of the second type four are found in London. The size of an organisation is a further difference, for bespoke tailors are able to exploit certain economies in large manufacturing units, which leads to a necessity for a large number of retail outlets, whereas clothiers require a wide range of supplies and are therefore dependent on several manufacturers. Vertical Integration is therefore a feature of importance in this trade. It is significant that most of the clothiers are based on London, near to most of the manufacturers and designers of clothing.

Table 5.Z. Large and Large-Medium Organisations in Mens Wear (* indicates a map)

Company	No. of Branches	Type	H.Q.	Comments
Bradleys *	168	Clothiers	Chester	
Dunn *	181	Hatters	London	
Foster Bros. *	165	Clothiers	Birmingham	
Hope Bros.	54	"	London	sub. G.U.S.
Lavey	68	"	"	
Meakers *	80	"	"	
Jackson	75	Tailor	Newcastle	sub. Burton
Willerby	70	"	London	sub. Times Furnishing
Alexandre	120	"	Leeds	sub. United Drapery
Montague Burton *	500	"	"	
John Collier	348	"	"	sub. United Drapery
Hepworth *	275	"	"	
Hipps	92	"	"	
Town Tailors	146	"	"	sub. G.U.S.
Geenwoods *	180	Clothiers	Guisley (Leeds)	"Weaver to Wearer"

In smaller organisations bespoke tailoring is of considerably less importance in the trade pattern so it is not surprising that twenty-two out of thirty-seven are based on London, and only two on Leeds.

Montague Burton Ltd., the largest organisation in the trade (an estimate of total sales is £30 million) has a distribution pattern which shows relatively few regional variations (figure 5.0. and table 5.ZZ). Only in Scotland, where there are relatively few, and in London, where there are relatively many; are there noticeable differences in the numbers of shops. Hierarchically Burton has a very full coverage. The only third order centres in which there is no branch are Boston, Caernarvon, Scarborough, Dorchester, Chichester, Warwick and Bridlington. In recent years, particularly since the merger with Jackson's Ltd. in 1953, a large number of shops have been closed, particularly those found in small towns. Some sites have in fact been allocated to Jackson's.

Hepworths Ltd. has rather greater regional variations than Burton. It is poorly represented particularly in the more industrial areas (figure 5.P). In the North West there are 365,000 people to each branch whereas in the South West only 114,000. This characteristic may be noted within the regions. Thus in Wales there are no branches in the valleys of the southern coalfield, and in the North Midlands there are as many branches in Lincolnshire as in Derbyshire, Nottinghamshire and Leicestershire. The importance of the company in rural areas is reflected by the facts that it only has shops in two of the 3G centres (industrial towns) and that 26% of all its shops are in 4th order centres (Burton in contrast has only 20%). This distribution pattern may be explained by the evolution of the organisation, for until 1948 it was a general clothier and outfitter rather than a specialist in outer garments as today. The more general type of trade could quite profitably be carried out in small towns. The new trading policy has had some quite marked effects on location. Table 5.22. shows that the majority of openings and closures since 1949 have tended to increase the company's representation in the more important towns.

In distinct contrast to Hepworth's is G.A. Dunn Ltd. which has particularly large numbers of shops in London and the North West (figure 5.Q.), and only seven in towns ranking below third order. The trading policy, a concentration on particularly urban articles like umbrellas and hats, may be seen to account for much of this distribution. It is of particular interest to note that four of the seven 3A centres without branches are the County Towns (Carlisle, Shrewsbury, Hereford and Salisbury) and that two of the remaining three are cities of similar character (York and Cambridge).

Unfortunately no information is available on John Collier Ltd. Town Tailors Ltd and Alexandre Ltd., three other organisations which are known to have a national coverage.

The other organisations listed in table 5.Z. are more regional in character than these "national" multiples, although Bradleys is beginning to approach a full English distribution (figure 5.M.). Organisations like Meakers, Greenwoods and Foster Bros. are well established only in certain regions. (figure 5.R). The first of these, Meakers, has eighty branches of which only twenty-two are found outside London.

These are mainly in the area south of Luton and east of Bournemouth. Foster Bros. (figure 5.R.) is based on Birmingham and has few branches in the London region, where a rather different trading pattern exists (one in which favoured styles are different ?). Greenwoods is equally regional. It did however extend its coverage in 1961 by a purchase of 17 branches of Maxwells Ltd. in South Wales, thus illustrating one of the general characteristics of regional multiples when extending their networks. The earlier expansion of Greewoods is of interest for soon after its foundation (at Bradford in 1918) it had a branch as far away as Sunderland (1921). Despite the significance of network factors, in general, multiples in this trade are always liable to take advantage of a particular opportunity in an important shopping centre.

Not all the large medium organisations are regional in character. Jackson, Hope Bros., Lavey and Willerby are all orientated to some extent to the grades of the hierarchy. The branches of Willerby in places ranking lower than 3A are Wolverhampton, Portsmouth, Newport and Stockport, all of which are probably under-valued by Carruthers' method of ranking.

Table ZZ. Montague Burton Ltd., Hepworths Ltd. and G.A. Dunn Ltd.

(a) The Urban Hierarchy.

	2	3A	3B	3C	3G	4A	4B	4C	London	Scot.	Others
Burton											
Centres with one branch	18	23	23	58	17	64	36	3	108	21	31
Total no. of branches	57	38	29	64	20	67	36	3	108	21	31
Hepworths											
Centres with one branch	17	23	21	45	2	47	24	0	32	32	12
Total no. of branches	25	24	———			ditto		———			
1949-1961 :											
Stores closed	2	2	4	5	0	24	23	6	2	13	6
Stores opened	16	9	3	6	1	0	0	0	14	1	4
Sites Required 1961	2	1	1	4	8	4	0	0	9	4	0
Dunn's											
Centres with one branch	17	16	14	21	15	6	0	0	65	2	1
Total no. of branches	27	———			ditto			———			

(b) Regional Distribution.
Population ('000) per branch

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
1.	112	119	110	117	78	94	104	117	103	98	115	143
2.	203	321	191	187	292	133	149	114	186	365	293	139
3.	465	347	404	467	128	364	349	309	528	274	860	646

1. - Burton
2. - Hepworth
3. - Dunn

CONCLUSION.

The degree to which the retail trades are controlled by central organising bodies, whether they be multiple companies or co-operative societies, is increasing. The share of multiples in retail sales was 23% in 1950, 25% in 1957 and 28% in 1961. The share of co-operatives was 12% in 1950, 12% in 1957 and 11% in 1961. In order to understand the distribution of particular elements in retailing it is of increasing importance to study the spatial aspects of these large scale organisations. This chapter has attempted to study the main features which determine the distribution of branches in multiple organisations. It is not, and was not intended to be, a definitive study of the geography of multiple organisations. Other aspects would deserve consideration in such a study. Indeed before that study can be made far more detailed information on each organisation is a necessity, closer investigations of the decision making process are required, and far more company histories need to be written. Chapter eight returns to some of the aspects of multiple retailing touched on in this chapter with respect to one type of town. Before this however, it is necessary to consider the pattern of co-operative retailing (chapter six), and how this and the multiple pattern combine to play an important role in determining the location of self-service shops (chapter seven).

The interaction of the two major forces behind any distribution of branch shops is so complex that although it will now be apparent that each trade, and each size of organisation, reflects it in a particular way, a detailed examination of the policy of each company is of fundamental interest to the geographer seeking an answer to the distribution patterns of retailing. Business organisation is a topic which has as yet been little examined for matters of spatial interest. In retailing it is of vital concern, and if the economic geographer is to examine the real causes of the distributions he studies far more is required than simple cartographic techniques, however much these may be of importance in the initial stages of investigation.

CHAPTER SIX

CO-OPERATIVE SOCIETIES

The geographical structure of Co-operative Retailing contrasts greatly with multiple trading. In the main this difference is inherent in the structure of co-operation in Great Britain [1], and may be explained by differences in the evolution of each type of trading. Multiple organisations owed much in their early history to the family connections of the individual entrepreneur and the horizons of his family group. Co-operative societies in the nineteenth century depended, not on one person, but on a group of people sharing the co-operative ideals. This fundamental distinction, despite attempts by some groups within the movement, is still of the greatest importance.

The major result of a contrasting evolution is that geographical variations are extremely prominent in co-operative trading. Indeed, these are of such a scale, that it could be said, that most of the hindrances to effective competition which confront the movement are fundamentally geographical. The Independent Commission [2] of 1958 reported

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1 It is not inherent in co-operative trading, for in countries like Sweden one national society exists. However, conditions of the European industrial revolution, in the nineteenth century, when workers were largely isolated in particular trading communities, were undoubtedly more favourable to the development of the local rather than the national society.

2 Co-operative Independent Commission Report, Co-operative Union 1958 P.40

that: "The distribution and siting of co-operative shops fails increasingly to correspond with the geographical pattern of retail trade." In 1960 the National Amalgamation Survey [3] was given terms of reference which were "economic and geographical in character". J.A. Hough [4], the research officer of the Co-operative Union, wrote in 1949 "geography has certainly a large influence on the number and size of co-operative societies".

The published materials of the Co-operative Union provide what is almost an embarrassment of data when compared with other types of retailing. Indeed a full length geographical study, based on them, is clearly feasible. This chapter only attempts to show the general pattern of trading, to place the movement in perspective with other types of retailing, to analyse some of the changes taking place in the geography of retailing (since comparative data on other organisations is not available), and to show the relative significance of one type of town in the over-all pattern of trading.

THE CHARACTER OF SOCIETIES

Individual societies vary considerably in the territory which they cover (figure 6A). Carr-Saunders [5], in 1938,

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3 National Amalgamation Survey, Co-operative Union 1960. p. 3

4 J.A. Hough, Co-operative Retailing, 1914-45.Co-operative Union 1949. p.98.

5 Carr-Saunders, Sargant Florence and Peers, Consumers Co-operation in Great Britain, 1938. London . Chapter three .

classified societies into eight types on this basis:-

(a) one shop rural societies.
(b) small industrial village societies.
(c) societies in struggling industrial areas.
(d) societies based on important shopping centres extending their activities into industrial areas.
(e) societies based on important shopping centres.
(f) societies located in the great centres of population.
(g) regional societies.
(h) suburban societies.

In general this is an admirable classification from the geographical viewpoint, and although it may be criticised in detail, particularly on the division between types (e), (f) and (g), Carr-Saunders work is still of fundamental importance to a study of co-operatives. It did in fact include maps of sample areas somewhat similar to figure 6A.

Small rural societies are particularly prominent in East Anglia, but can also be found in the South-West and in those parts of Highland Britain which are not industrial. In East Anglia these societies are found in the areas mid-way between the major shopping centres of Norwich, Cambridge and Ipswich. In Highland Britain the normal location of this type of society is in upper valleys dissecting the hill-lands. Settlements in these valleys are away from the competition of multiple organisations, but have much the same outlook as the industrial communities of the neighbouring coalfields. Co-operative societies in such places therefore account for high proportions of all trade.

The number of small industrial village societies is great. Indeed in constructing figure 6A it proved necessary to delimit "special areas in Central Scotland, North-East England, South Wales, the Northern half of the main English industrial axis, the West Midland and London Conurbations, in which only societies and not their branches are shown. One area which is shown in the same detail as the rest of the map, which has numbers of small village societies is Northamptonshire. This illustrates the general pattern fairly clearly. Some of the significance of co-operative societies of this, and to a lesser extent the preceding group, can be gained from the Census. Table 6A sets out

TABLE 6A SHARE OF TRADE IN RURAL AREAS[1], CO-OPERATIVES AND MULTIPLES CONCENTRATION INDEX[2].

	GB	N	Y	NM	E	L SE	S	SW	M	NW	Wales	Scot.
Co-operative	1.1	1.1	1.1	1.0	0.6	0.3	0.7	0.8	0.8	1.1	1.1	1.2
Multiples	0.5	0.7	0.6	0.5	0.6	0.3	0.8	0.7	0.6	0.5	0.5	0.4

1 Rural Areas are non-urban administrative areas.
2 Concentration Index = $\frac{\text{Share of sales in Rural Areas}}{\text{Share of sales in region as a whole.}}$

concentration indices of the share of sales of co-operative societies and multiple organisations in rural areas. In the regions where co-operative societies are particularly important in general they have a relatively high proportion of trade. This may be attributed to the special importance of these small societies. Multiples in contrast vary very little in their share of trade from region to region.

Straggling industrial areas are mainly found in the areas termed "special" above. Societies serving such areas are characterised by high numbers of shops, usually fairly small, found in a limited area surrounding the central premises. They are often the result of early amalgamations of village societies.

Some of the most important societies can be classified as being based on an "important shopping centre", but extending their influence into industrial areas. The foremost example of a society of this type is the Barnsley and British Co-operative Society, which extends its influence over a wide area of South Yorkshire. In 1960 its total turnover was £12,600,000, it had over 200 shops, employed over 3,000 people, and at 1/6½d it had the highest dividend rate, for its size, of any society in Great Britain. Other societies of this type are less prominent, but it is undoubtedly true to say that in total they are extremely important.

The societies which are of special interest to this study are those found in County Towns [6]. In almost all cases they are spatially very important, but there is no clear break between them and societies found in regional capitals, or indeed the regional societies. In terms of trading area the three societies which are most important are Lincoln, West Somerset (based on Taunton) and Peterborough.

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6 See P. 362

Societies based in regional capitals like Brighton, Portsmouth, Reading, Bristol and Hull all cover extensive areas. In general societies appear to extend their influence over the third order hinterlands of their base towns. For instance the Hereford Society has branches in Leominster, Ross and Ledbury; and the Shrewsbury Society has branches in Ludlow, Church Stretton, Craven Arms and Tenbury Wells amongst other towns.

The relationship between the area which a society trades in and its total sales varies with population density. No means of precisely estimating this relationship exists. It is possible however, to demonstrate a relationship between the size of a society and the rank of its central town. Table 6B, found at the end of this chapter, sets out the largest societies by region. It is a reasonable hypothesis that the largest societies should be found in the most important towns as listed by Green (see Appendix C). It is

SECOND RANK TOWNS

	No. of Towns	No. with Societies with sales over £10 million
Full Rank	6	6
"Pseudo"	3	0
"Proto"	4	3
Scottish	4	2
Other places	-	3

of considerable interest that the "Pseudo" second order centres do not have large societies, the result of their location away from the main areas of co-operative activity. The only "Proto" centre which has only small societies is

Stoke, something probably due to the existence of a fragmented shopping structure in the potteries. In Scotland, Dundee and Aberdeen are found with societies which do not have turnovers of this size. The towns which do not rank as second order centres but which have large societies are Barnsley, Portsmouth and Birkenhead. Barnsley has been referred to above. Portsmouth (the Portsea Island Society) has had a particularly active society, which has in fact expanded beyond the trading area of Portsmouth, into areas normally more dependent on Southampton (e.g. Winchester) and is therefore an exception. Birkenhead probably owes its large size of society to a particularly high proportion of inhabitants of social classes four and five, co-operative societies normally being particularly orientated to such customers.

Towns of 3A rank (Carruthers) have relatively large societies. Fifteen out of the twenty-three towns so classified have in fact societies with turnovers over £3,000,000. There are two exceptions, Sunderland (£1.5M) and Swansea (£1.4M), which are not easily explained. Sunderland's position in an area of well developed societies clearly indicates the lack of mobility of co-operative customers, when making co-operative purchases. The truncation of the 'normal' trading hinterland by this organisational factor must be seen as a major problem of co-operation. This is despite exchange arrangements by which co-operators may take dividend on their goods, even though they may not be members of that particular society. In the case of Swansea something similar may explain the low sales, it should be noted however, that co-operation is not well developed in Wales. The remaining exceptions are of great significance. They are Hereford, Chester, Shrewsbury, Salisbury, Carlisle and Exeter, all of which have small societies. The County Towns are generally distinguishable by being poor areas for co-operative trading. This is the result of social structure, the importance of shopping goods trading in these towns (a type of trade poorly developed by co-operatives), and by the high land values found in the major shopping streets of these towns.

The group of societies classified by Carr-Saunders as the regional societies is perhaps the least satisfactory grouping of all. "The distinctive feature of these societies is that they cover a wide stretch of country, and include centres of population which are in no sense subordinate to the town in which the head office is situated." [7] To the authors the area served by such societies has "no such natural unity." Only the Brighton Society, and possibly the Reading and Portsea Island Societies, were cited as examples of this type. Figure 6B shows that these societies extended little beyond the third order hinterland of their base towns,

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7 Carr-Saunders _op. cit._ P.67

although Portsmouth, since 1940, has to a small extent in the north-west part of its trading area. A rather more useful example of a regional society is the West Somerset Society which has extended its trading area, by a series of amalgamations since 1940, to cover a rather wider area than that looking to Taunton for third order demands.

The final group of societies in the classification is the suburban group. These range considerably in size and little worthwhile generalisation can be made about them. In some of the largest towns the failure of societies to amalgamate has undoubtedly resulted in a weakening of competitive power. Glasgow and Manchester, two traditional bastions of co-operative trading, probably suffer to some extent from a great provision of societies.

One type of society which has been instituted since Carr-Saunders work is the Society directly affliated to the Co-operative Wholesale Society, through the Co-operative Retail Services Ltd. This organisation was directed "to undertake retail trade in areas where there are not sufficient facilities for the same."[8] It has however, tended to act as an "ambulance service" for those independent societies which have found themselves with particular problems.

It will now be clear that societies vary greatly in size. Reference has already been made to the difficulty

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8 Original resolution quoted <u>Agenda</u>. September 1957 P.93

which confronts attempts to estimate the population dependent on a particular society. One attempt [9] has been made, by the Co-operative Union in 1959 to ask societies to estimate the population they serve. 689 societies out of 889 made a return to this survey, with the majority of non-replies being small societies. Table 6C shows the dispersion of societies, in regions of the Co-operative Union (see Appendix A) with particular values of per capita sales. Only one major regional distinction can be seen from this table. Scotland has a large number of societies with very high sales per capita.

TABLE 6C

SOCIETIES WHICH GAVE A POP. FIGURE FOR 1959 ARRANGED TO SHOW DISPERSION OF CO-OP TRADE PER HEAD OF POPULATION

	<£10	£10-20	£20-30	£30-40	£40-50	£50-60	£60-70	>£70	Total
Irish	2	-	1	-	-	-	-	-	3
M	2	16	20	28	16	3	5	-	90
N	3	17	15	22	14	5	2	4	82
NE	7	26	36	15	3	3	-	2	92
NW	6	51	50	19	4	2	3	1	136
Scot	3	5	22	29	30	20	14	10	133
S	12	26	25	7	5	1	1	-	77
SW	4	12	14	6	-	1	-	-	37
W	6	10	14	5	2	1	-	1	39
Total	45	163	197	131	74	36	25	18	689

The pattern of trade in areas outside the "special areas" has now been described fairly fully. Before turning to a more analytical account it is of value to show, in somewhat

9 J.A. Hough, Co-operative Trade Per Head, <u>Co-operative Review</u> Nov. 1960

greater detail, the pattern existing in parts of the industrial areas. Two sample areas have been selected : the Rochdale District and the North-East Coalfield.

A special study of the Rochdale District's societies has been made by Ainsworth [10], which includes estimates of the population served by each society there. These estimates are clearly not of equal accurracy, but three significant groupings can be distinguished (Table 6D). The three societies of the highest group are exceptional for "the trade of all three is considerably inflated by the purchases made through those societies by employees of the national federations at the C.W.S. Manchester Showrooms". The division of greatest interest is that between the other two

TABLE 6D ESTIMATES OF PER CAPITA SALES BY SOCIETIES IN ROCHDALE DISTRICT 1960.

	1	2		1	2
Lanebottom	69.0	207	Littleborough	21.2	212
New Hey	40.2	65	Healey	17.5	44
Tottington	36.4	215	Heywood	15.7	392
Smallbridge	26.6	25	Shawforth	13.5	17
Bury	26.1	1512	Ramsbottom	13.3	183
Woolfold	25.6	128	Whitworth	10.5	53
Wardle	24.8	17	Firgrove	6.4	57
Rochdale	22.8	1964			

1 = S/H (£'s) 2 = Total Sales (£'000)

groupings. The two major shopping centres, Rochdale and Bury, have societies which apparantly have a per capita sales

10 S.H. Ainsworth, Rochdale District Reviewed, <u>Co-operative Review</u>. January 1961. PP. 13-15

figure equivalent to Wardle (an isolated village society) and to Littleborough, which probably fulfills certain functions for a hinterland population in the Upper Roch Valley. The other societies in this group, Smallbridge and Woolfold, have very low estimated populations, and a small inaccuracy in these will have a proportionately great effect on the per capita sales figure. Societies with lower per capita sales are all found in areas which have particularly good communications with the major shopping centres. Heywood, as the clearest example, must lose much of the custom of its population to Bury and Rochdale. One society which is unexpectedly found in this lowest group is Ramsbottom which might have been expected to have functions similar to Littleborough for the Irwell Valley.

This pattern is found in most of the industrial areas. First, there are a number of societies with special trading significance, either because they are based on major shopping centres, and so benefit from "thejourney to shops", or because they are located in isolated and self-contained communities. Second, there are a number of less significant societies, which are probably important only for food trading.

The trading pattern of the North-East Coalfield (figure 6C) reveals the same features as the Rochdale district. There is the same inter-locking of trade areas, in both there is far more inter-locking than in rural areas. There is a rather more pronounced lack of correlation between the importance of the base settlement of a society and the importance of that society.

The interlocking of trade areas is most extensive in the newer areas of the coalfield. This is partly because societies were established in these areas later than in the older mined areas. A more confused pattern is clearly likely to develop when the settlement pattern is developing at the same time as societies are being founded. Table 6E shows some significant dates in the evolution of the pattern.

FOUNDATION DATES OF SOCIETIES (from G.D.H. Cole, <u>A Century of Co-operation</u> (1944)

TABLE 6E

"Old Coalfield"	"New Coalfield"
Blaydon 1858	Moorsley 1868
Bishop Auckland 1860	Cornforth 1870
Chester-le-Street 1862	Sherburn 1874
Consett 1863	Pittington 1874
Swalwell 1863	Easington 1874
	Murton) after 1874
	Hetton Downs) after 1874
	Station Town) after 1874

Mining in the "Old Coalfield" has been conducted in some form for far longer than the last century, so no attempt has been made to trace the date of first mining in the various areas listed. This contrast between the two areas of the coalfield is not quite as direct as it might seem for in fact most of the mines in the areas termed the "new coalfield" were opened in the 1830's. A time-lag is however understandable for the newer areas would not at first have such a close social structure as the older.

The relationship between the flow of trade and the trading areas of societies is apparent in the cases of Chester-le-Street and Bishop Auckland, but other societies extend over areas which have little homogeneity in this respect. Typical examples of this are Annfield Plain, Station Town (Wingate) and Sherburn Societies. In industrial areas the close net of shopping centres makes it possible for energetic managements and committees to extend their trading area well beyond any "natural" limits. This feature is given further illustration by the great contrast between societies in the number of shops found in their base settlements.

THE TRADE OF SOCIETIES

The proportion of retail trade accounted for by Co-operative societies varies from 20% in the North and Scotland to 6.1% in London (Table 6F)*. Their significance, both nationally and regionally, in particular trades varies even more than this. They account for three-fifths of the dairy trade in Yorkshire but only negligible proportions of the trade of such shops as fishmongers, jewellers and confectioners in many regions. Nationally about two-thirds of the sales of co-operatives are made by food shops. There are some regional variations in this proportion, but these are in the main small. Specialist trades vary considerably from region

* At end of chapter

to region for each only accounts for a very small proportion of the total trade of co-operatives. The great importance of food trading is in fact a reflection of traditional orientation, for the consumption of other commodities by working class households was in the past extremely limited. It is also what co-operators call the "dry goods problem". All attempts to expand "dry goods" or the speciality trades have resulted in only marginal improvements in the pattern. This is seen by many as a result of the local, rather than national, structure of societies, many of which are in consequence too small to benefit from any advantages of scale that exist in the speciality trades. It is therefore of particular interest to note the acquistion in July 1962 by the C.W.S. of the 100 shops of the Blindells shoe chain.

The major characteristics of the regional variations which exist can be seen in Table 61, which compares the North and South standard regions, which may be said to be typical of the overall contrast between Northern and Southern England. In the South, despite higher proportions of all sales by speciality shops, the proportion of co-operative sales made up by these trades is relatively far below the North. This is perhaps offset slightly by higher sales in general stores in the south, but there is no evidence available to show whether the commodities sold in these stores vary regionally. The insignificance of speciality shops is further

TABLE 6I CO-OPERATIVE TRADE IN THE NORTH AND SOUTH REGIONS

Trade Type	Total Trade (%by each type of shop)		Co-operative Trade (% by each type of shop)		Co-operative Share of all Trade %	
	N	S	N	S	N	S
Grocery	28.2	24.8	46.8	45.9	33.8	14.3
OtherFood	17.3	19.5	17.3	27.9	23.9	11.1
Clothing	16.9	16.8	11.9	6.6	14.4	3.0
Hardware	2.7	5.3	1.3	0.8	9.6	1.2
Chemist	2.9	3.6	2.0	1.1	13.7	2.5
Furniture	5.1	4.2	2.9	1.8	11.7	3.3
General	12.2	8.9	11.4	10.9	19.1	9.5
Confectioners	7.8	x	0.7	x	1.8	x
Total Trade	———		———		20.3	7.7

to be appreciated from Table 6J which shows the numbers of shops in some of these trades.

TABLE 6J NUMBERS OF CO-OPERATIVE SHOPS

	GB	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot
Jewellery	30	5	6		8						8		
Hardware	322	39	20	35	30	22	13	13	24	10	20	17	79
Confectioners	157	18	8	17	7		5			7	15		40

In the speciality trades the most significant type of co-operative shop is the Emporium. This type of shop is in the main classified in the general group of the Census, and in fact 169 out of the 176 shops in this group classify as Department Stores. Since they are, by definition, large there is a distinct relationship between the numbers of such shops and the number of large societies. In 1960 208 societies had sales over one million pounds. The correlation varies from region to region, but four have a particularly close relationship:-

	Wales	SE	S	SW
number of societies	13	10	11	13
number of shops	14	9	10	13

In the industrial regions, where co-operators are more significant in all trade, it is necessary to use a larger size of society for such comparisons. The relation of societies with sales over £2,500,000 and these shops is close in :-

	Y	NM	E	Scot	M	NW
number of societies	9	13	7	14	11	17
number of shops	9	11	6	16	11	12

In the London region 33 general stores are run by only seven societies. Four of these societies have sales over £5,000,000. Another, the Anchor Society, has a total turnover of £439,190 through one store. Conditions in the region are hardly comparable with other regions.

In the North the special importance of co-operative societies in the overall trading pattern is reflected by a relatively large number of general stores. There are in fact 27 stores and only 23 societies with a turnover of over one million pounds.

The average size of co-operative shops (Table 6K)* is in general larger than that of all shops. It is also often larger than that of the shops of all other types of organisation (figure 2A). Regions where they are relatively largest are those which have a number of large societies: the Midlands, Wales, the North Midlands, the North and London. The trades in which co-operative shops are relatively largest are dairymen, bakers, grocers, confectioners and clothing. In the dairy trade there are some particularly large regional variations. Yorkshire, the North Midlands and the Midlands are areas where co-operative dairies are typically very large central depots, which are at least $5\frac{1}{2}$ times larger than the average dairy in these regions. Large societies can clearly take advantage of economics of large depots. The pattern of bakeries is rather more involved, depending not only on the size of societies but also on the frequency of delivery rounds. The regions where co-operative shops are relatively far larger than other shops are the North Midlands, London, the East and the South.

It is not really possible to place too much reliance on the data provided by the Census in the case of co-operative shops, for their outlet structure is rather different to the outlets of other types of trader. The clearest pattern is therefore that of all retail trades rather than those of individual trades.

The causes of the co-operative trading pattern are complex. The evolution of the pattern is the most important of these. Industrial and working class communities have always been the bastions of co-operation, and so societies have always been strongly concentrated in the regions where they are found. Many of the areas developed first, during the early stages of the industrial revolution of the nineteenth century, were initially poorly provided with shops. Co-operative societies were often the first to break the monopoly position of "tommy shops" controlled by factory or mine managements. The political connections of co-operation with the working class political organisations have meant that throughout their history societies have attracted considerable loyalty not normally accorded to other trades. Both of these factors, of greatest importance in the nineteenth century, have probably diminished in significance throughout the first half of the twentieth century.

CHANGE

Changes in the co-operative trading pattern may be observed from data provided by the Co-operative Union. Table 6L shows the changes which have taken place in per

TABLE 6L CO-OPERATIVE TRADE PER HEAD OF THE POPULATION £'s.

	1911	1939	1939 (1911=100)	1947	1957	1957 1947=100
Scotland	3.2	8.8	257	15.3	29.6	193
North *	3.2	7.2	225	-	-	-
North	-	-	-	14.5	30.5	211
North East	-	-	-	10.5	22.6	215
North West	-	-	-	9.9	18.0	182
Midlands *	1.4	6.4	457	9.9	23.4	237
South	0.5	4.0	800	5.8	13.3	231
South West	1.2	3.7	308	7.1	14.7	209
Wales+West	-	-	-	6.9	15.6	229
North Wales *	0.5	3.3	660	-	-	-
South Wales *	1.2	3.7	308	-	-	-
Total	1.8	5.8	322	9.1	19.2	211

Regions are Co-operative Union Regions except those starred, which at different periods have a greater breakdown, source various articles Co-operative Review.

capita sales. In 1911 two regions were clearly dominant in the pattern of trading. Scotland and the North were those regions, where political connections and the poor provision of shops by other types of retailer combined to give co-operatives considerable advantages. By 1939 regional differences were less marked. The contrast between the most important region and the least important one has narrowed:-

1911	1939	1947	1957
6.4	2.7	2.6	2.3

No. of times per capita sales higher in most important region than in the least.

In 1939 the two regions which had had the lowest per capita sales in 1911 had the highest increase. Slightly different regions for the period 1947 to 1957 show that the direction of change has altered somewhat, while retaining most of its significant characteristics. The Midland region is now the fastest growing region of co-operative trade per capita, closely followed it is true by the South and by Wales. Scotland and the North West show a slower rate of growth.

A more detailed picture of the change can be gained from figure 6D. Between 1914 and 1939 change is shown, as estimated by Hough [11] for Co-operative Districts, corrected for national variations in the value of money but not population. The greatest increases in total trade during the period were recorded in the Home Counties, the area where

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11 Hough <u>op cit</u>

population was growing fastest. The growth however, of co-operative trade outstripped that of population. In the rest of the country increases may be explained by reference to one of three factors. The lowest increases were found in areas which suffered most from the depression and which were strong co-operatively in 1914. Faster rates of growth occurred in areas which were poorly developed by co-operative societies in 1914, such as South West Wales. Organisational factors are hard to distinguish, it would seem however, that the contrast between Devon and Somerset might well be explained by these factors.

The direction of change between 1938 and 1952 is shown [12] in terms of sales per head in figure 6D. This shows the importance of the traditional areas, Central Scotland, Northumberland and Durham, South Wales and Sheffield districts during this period.

The reasons for these changes in significance are instructive, for the changes show that, despite highly publicised efforts in Southern England, the co-operative movement has fallen behind there, while intensifying its importance in the areas in which it was traditionally strong. Clearly the second of these features is partly the result of rises in the incomes of traditional customers who had

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12 Based on J.A. Hough and S.A. Ainsworth, "A new co-operative Map" Agenda, March 1954. pp.18-30

suffered so much from the depression. It is also a reflection of the existence of a large number of establishments now serving a smaller population, for the traditional areas are those which have experienced a decrease in population. Co-operative societies are usually more loath to undertake closures than are multiple organisations. The poor performance of societies in Southern England is partly the result of this low mobility of co-operative capital resources, for the numbers of shops in this region have increased at a slower rate than population. It is also probably, but less demonstrably, the result of considerable competition from extremely efficient multiple organisations. In grocery in particular, price competition in the London area has made it increasingly difficult for societies to satisfy the demands of members with traditional pricing policies. Table 6M shows that societies in the London area have far lower

TABLE 6M LONDON CO-OPERATIVE SOCIETIES

	Sales 1956 £('000's)	Increase or Decrease 1956-1960 £('000's)	% change 1956-1960
Enfield	5,266	251	4.8
Grays	6,287	631	10.0
London	55,944	2,757	4.9
Royal Arsenal	26,377	939	3.5
South Suburban	13,939	-1,465	-10.5
Staines	942	58	6.2
Slough	1,795	165	9.2
Great Britain	908	124	13.7

increases of sales than the movement as a whole during the period 1956-60. This is to some extent the result of population changes, but even Slough and Grays, trading in areas with very high population increases, could not match the national increase.

The process of change has resulted in amalgamations between societies. In general these have made the areas served by particular societies far closer to the third order hinterlands of the towns in which they are based. In particular this applies only to those areas where conurbations do not exist, and is most developed where trading areas are most clearly defined, as in the case of County Towns. In total these changes have been considerable:-

NUMBER OF SOCIETIES

1881	971	1911	1403	1941	1059
1891	1307	1921	1352	1951	1001
1901	1438	1931	1188	1961	875

The National Amalgamation survey [13] suggests that they should be extended until there are only 307 societies.

Figure 6B shows the trading pattern of societies in 1940 in Southern England. If this is compared with figure 6A it will be seen that great changes have taken place. In Cornwall for instance, there were 16 societies in 1940 but only 9 in 1957. Spatially the most significant change was the emergence of the West Somerset Society, which in

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13 National Amalgamation Survey, Co-operative Union, September, 1960.

twenty years has expanded from the immediate area of Taunton to cover most of West and Central Somerset and much of East Devon.

The National Amalgamation Survey Committee's proposals vary considerably from region to region. Table 6N shows

TABLE 6N PROPOSED AMALGAMATIONS

	No. of societies 1960	Proposed No.	% Decrease	Sales (£'s million) of proposed Groups of societies in 1959					
				<.5	.5-1.0	1.0-2.5	2.5-5.0	5.0-10.0	>10.0
M	99	45	54.5	7	5	13	10	6	4
N	96	33	65.6	5	3	11	10	3	1
NE	125	22	82.3	-	3	3	8	5	3
NW	171	43	74.8	3	10	11	10	7	2
Scot	172	72	58.2	16	7	14	13	6	2
S	90	56	37.8	8	11	14	11	8	4
SW	42	13	69.1	2	2	4	1	3	1
W	51	23	54.9	6	3	9	4	1	-
Total	859	307	64.3	47	44	82	67	39	17

that the greatest proportional number of amalgamations are proposed for the North-East (Yorkshire) and the North-West regions. If the proposals were accepted 70% of societies would have sales of over one million pounds. 91 smaller societies would remain. They are shown in figure 6D. In general they are found in isolated areas, in particular in Western Wales, the Southern Uplands of Scotland, the Peak District and in East Anglia. Only two, Hereford and Salisbury, would be based on County Towns. The committee clearly wished to form the largest practicable units, but certain areas were too isolated for this to be possible.

The actual proposals of the committee are shown in figure 6E. This shows quite clearly the great amalgamations deemed necessary in the "special areas" of figure 6A. In the Huddersfield district for instance an amalgamation of 34 societies is proposed. Some of the most interesting groupings are found in isolated areas of industry: the Ayrshire Coalfield, the Cumberland Coalfield, Barrow in Furness, Blaenau Ffestiniog and the South Cotswold wool towns, areas which are noticeable for declining population in recent years.

This study of co-operative retailing has attempted further to establish the significance of a geographical approach to the academic study of the distributive trades. It has shown that co-operative trading, as compared with multiples, corresponds very differently to the features of urban rank discussed in section two of this thesis. It has discussed in some detail some of the changes which have taken place in the pattern of trading. When the 1961 Census is published far more detailed studies of this sort will be possible, but it has been thought worth while to demonstrate here the potentialities of the approach. Above all the chapter has attempted to show the interaction of regional and hierarchical differences which is one of the major themes of this thesis.

TABLE 6B TOTAL SALES OF LARGE SOCIETIES 1960 LISTED BY REGIONS IN £ MILLION

North

Newcastle	13.7
Middlesbrough	5.5
Stockton	4.5
Darlington	4.0

Yorkshire

Leeds	15.2
Barnsley	12.6
Sheffield)	5.2
Brightside)	6.6
Hull	7.8
Doncaster	5.7
Bradford	3.3

North Midland

Nottingham	16.3
Leicester	11.8
Derby	11.1
Mansfield	6.7
Lincoln	6.0
Peterborough	5.2
Northampton	3.6

East

Grays	6.9
Ipswich	6.8
Luton	5.2
Colchester	4.8
Cambridge	3.8
Norwich	3.8

London

London	58.7
Arsenal	27.3
South Suburban	12.4
Enfield	5.5

South-East

Brighton	6.4

South

Portsea Island	14.6
Oxford	6.6
Reading	4.8
Parkstone	3.8
Southampton	3.5

South West

Bristol	10.9
Plymouth	7.7
Gloucester	4.5
West Somerset	4.4.
Swindon	4.2

Midland

Birmingham	27.9
Walsall	7.8
Coventry	7.2
Ten Acres	5.7
Nuneaton	3.6
Worcester	3.4
Burslem }	3.4
Silverdales}	1.7

North West

Liverpool	12.4
Birkenhead	10.1
Manchester)	7.8
Others)	2.7
St. Helens	4.9
Warrington	4.7
Blackpool	4.7
Stockport	3.6
Preston	3.3

Wales

Aberdare	2.6
Pontycymmer	2.2
Ynyshwl	2.2

Scotland

Edinburgh St. Cuthbert's	13.1
South Glasgow)	8.9
Glasgow (others))	4.6
North Aberdeen	8.9
Clydebank	4.8
Leith	4.0
Dalziel	3.9
Dundee	3.8

Note:-
(a) Brightside society is in Sheffield.
(b) 5 societies are found in Glasgow.
(c) 7 societies are found in Manchester.

TABLE 6F

A. SALES OF CO-OPERATIVE SOCIETIES
PROPORTION OF REGIONAL SALES BY CO-OPERATIVES

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot
Total	20.3	14.2	17.0	10.9	6.1	7.1	7.7	10.2	11.0	13.4	11.2	20.0
Grocers	33.8	27.5	29.5	19.0	15.1	12.6	14.3	19.4	20.1	28.6	21.5	37.4
Dairies	52.3	59.9	57.6	32.6	18.3	19.3	23.1	29.6	43.2	49.5	32.8	42.9
Butchers	24.6	20.3	22.1	14.9	9.4	8.3	10.5	12.4	15.2	20.1	9.2	29.2
Fishmongers	3.3	0.9	5.3	*	0.5	*	*	*	*	2.4	*	*
Greengrocers	15.0	7.6	8.8	6.6	4.5	1.7	2.8	5.9	6.7	3.6	2.5	8.7
Bakers	21.6	10.6	30.4	21.6	14.3	11.9	16.3	15.3	23.2	12.8	22.1	28.2
Clothing	14.4	6.6	8.0	6.9	1.4	3.9	3.0	3.8	3.9	7.2	5.6	14.4
Hardware	9.6	1.4	3.2	2.2	0.4	0.6	1.2	0.9	0.6	0.6	1.8	5.7
Chemists	13.7	10.4	8.5	4.6	4.0	2.9	2.5	3.1	5.7	6.0	3.5	10.6
Jewellers	1.6	1.1	*	1.6	*	*	*	*	*	1.4	*	*
Confectioners	1.8	0.3	1.2	0.4	*	0.3	*	*	0.4	0.7	*	1.7
Furniture	11.7	6.2	8.0	7.3	1.3	3.4	3.3	4.3	5.1	8.5	7.5	14.1
General	19.1	12.3	18.8	8.2	7.5	12.0	9.5	15.3	11.2	7.2	15.5	10.3

B. INDEX OF SALES $\left(\dfrac{\text{PROPORTION OF ALL SALES}}{\text{PROPORTION OF SALES IN PARTICULAR TRADE}}\right)$

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot
Grocers	0.60	0.52	0.58	0.57	0.40	0.56	0.54	0.53	0.55	0.47	0.52	0.53
Dairies	0.39	0.24	0.30	0.33	0.33	0.37	0.33	0.34	0.25	0.27	0.34	0.47
Butchers	0.83	0.70	0.77	0.73	0.65	0.86	0.73	0.82	0.72	0.67	1.22	0.68
Fishmongers	6.15	15.78	13.21	*	12.2	*	*	*	*	5.58	*	*
Greengrocers	1.35	1.87	1.93	1.65	1.36	4.18	2.75	1.73	1.64	3.72	4.48	2.30
Bakers	0.94	1.34	0.60	0.50	0.43	0.60	0.47	0.67	0.47	1.05	0.51	0.71
Clothing	1.41	2.15	2.13	1.58	4.36	7.82	2.57	2.68	2.82	1.86	2.0	1.39
Hardware	2.11	10.14	5.31	5.00	15.25	11.83	6.42	11.33	18.33	22.33	6.2	3.51
Chemists	1.48	1.37	2.00	2.37	1.53	2.45	3.08	3.29	1.93	2.23	3.2	1.89
Jewellers	12.69	12.91	*	6.81	*	*	*	*	*	9.57	*	*
Confectioners	11.28	47.33	14.17	27.25	*	23.67	*	*	27.50	19.14	*	11.76
Furniture	1.74	2.29	2.13	1.49	4.69	2.09	2.33	2.37	2.16	1.58	1.49	1.42
General	1.06	1.15	0.90	1.33	0.81	0.59	0.81	0.67	0.98	1.86	0.72	1.94

Table 6.K. The Size of Co-operative Establishments

A. Average Size of Establisments (£'000)

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
Total	24.9	17.4	22.3	23.9	35.0	23.6	25.0	20.4	25.8	18.3	21.7	22.3
Grocers	28.0	20.7	23.9	28.6	30.9	24.9	26.8	24.3	26.9	20.0	24.0	30.5
Dairies	81.5	111.9	117.7	74.0	107.4	47.0	51.2	51.8	218.4	73.0	38.1	20.8
Butchers	10.3	6.0	7.1	8.6	12.1	8.8	10.3	8.9	8.9	9.8	7.3	11.7
Fishmongers	4.3	6.2	4.2	*	6.7	*	*	*	*	4.9	*	*
Greengrocers	8.7	6.0	8.0	7.4	8.3	6.8	6.1	5.9	8.9	5.6	6.3	7.6
Bakers	12.6	6.5	29.3	32.6	35.3	23.5	35.6	20.9	23.6	15.9	16.2	14.7
Clothing	22.6	13.7	21.4	28.4	25.2	23.4	19.6	12.4	21.4	15.3	18.4	23.0
Hardware	20.2	11.5	14.7	12.3	8.5	6.3	12.4	6.2	11.7	8.2	10.1	13.0
Chemists	11.7	9.2	9.7	11.8	11.4	8.0	8.9	8.6	10.6	9.5	8.2	9.2
Jewellers	11.8	11.3	*	9.6	*	*	*	*	*	16.0	*	*
Confectioners	23.6	12.8	15.9	13.6	*	15.4	*	*	20.9	28.3	*	22.2
Furniture	36.2	39.0	35.4	33.2	54.4	26.0	22.6	15.7	39.2	30.8	30.8	39.0

B. Size-Index : $\frac{\text{Average Size of Co-operative Establishments}}{\text{Average Size of all Establishments.}}$

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
Total	2.7	2.2	2.8	2.5	2.7	2.4	2.4	2.2	3.1	2.5	3.0	2.2
Grocers	2.8	2.7	3.0	2.9	2.4	2.4	2.7	2.7	3.6	2.9	3.2	2.5
Dairies	4.9	8.3	5.6	3.2	3.2	1.8	1.9	3.2	7.2	4.1	2.9	1.7
Butchers	1.5	1.1	0.9	1.2	1.2	1.1	1.2	1.3	1.3	1.8	1.4	1.4
Fishmongers	0.9	1.1	0.8	*	0.8	*	*	*	*	0.9	*	*
Greengrocers	1.5	1.5	2.2	1.7	1.2	1.5	1.2	1.6	1.7	1.3	1.9	1.5
Bakers	2.2	1.5	3.9	4.0	3.6	2.9	4.1	2.4	2.5	3.3	2.9	2.5
Clothing	2.2	1.7	2.6	2.7	1.9	2.2	2.1	1.1	2.4	2.1	2.1	1.9
Hardware	3.4	1.7	2.0	1.4	1.0	0.8	1.5	0.8	1.7	1.5	1.7	1.9
Chemists	1.2	1.1	0.99	1.1	1.1	0.8	0.8	0.8	1.1	1.2	0.9	1.1
Jewellers	2.3	2.1	*	1.9	*	*	*	*	*	3.6	*	*
Confectioners	3.7	2.1	2.9	2.0	*	2.1	*	*	3.3	4.9	*	3.6
Furniture	1.9	2.4	2.2	2.3	3.3	2.1	1.4	1.0	2.3	2.4	1.7	1.9

Chapter Seven - The Retailing Revolution

The changes which have taken place in retailing since 1950, and particularly since the final freeing of war-time controls in 1954, have been both profound and rapid.[1] Two changes are of particular interest to the student of location: the growth of self-service techniques and of the group organisation of independent traders. In many topics a full understanding of an existing pattern depends on a clear knowledge of the changes taking place within it. This is particularly true of retailing for the two new trading methods referred to here are accounting for increasing proportions of the total sales of groceries, and smaller proportions of the sales of a number of allied goods.

Self-Service Trading

Self-service trading is a post 1945 growth in Great Britain. Its expansion may be summarised below:-

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1. The speed of change presents special problems to the analyst. In this chapter the conditions described generally refer to the autumn of 1960. In some cases analysis of 1961 conditions has been attempted, but since changes during the year were mainly ones of degree rather than direction, no attempt has been made to make a full analysis of this pattern. Much of the information on which the account is based is taken from directories published by "Self Service and Supermarket" the trade journal, which estimates that it achieves a 95% coverage of self-service shops.

Table 7A. Self-Service Shops (excluding Supermarkets) 1961-62

	Total			Capitalist		Co-operative			
	1	2	3	1	2	1	2	3	4
N	453	7179	5.7	335	9708	118	27390	11.8	26.0
Y	496	8403	5.4	201	20734	295	14129	20.9	59.5
NM	536	6779	10.5	211	17223	325	11151	29.1	60.6
E	671	5573	9.7	457	8206	214	17458	44.5	31.6
L	1328	5594	10.0	1160	7043	168	48643	26.3	12.6
SE	436	6699	10.3	304	9608	132	22128	41.2	30.5
S*	501	5658	9.9	304	9273	197	14310	58.6	38.6
SW*	524	6504	7.2	236	14830	288	11840	50.0	55.3
M	659	7214	4.4	321	14065	338	14065	44.5	51.3
NW	815	8059	7.5	300	21893	515	12792	23.2	63.3
Wales	314	8411	3.2	208	12216	106	24915	19.2	26.7
Scot	721	7175	4.0	438	14096	283	18280	16.7	29.2

* These regions are the 1961 Standard Regions (see Appendix A)
1 = Number of Self-Service Shops
2 = Population per Self-Service Shop
3 = Self-Service Shops as a % of Grocers shops (figure for 1950)
4 = % of self-service shops owned by Co-operatives.

Date	No. of self-service shops (s/s)	Sales (£ Million)	% of Grocery Sales by s/s
1947	10	-	-
1950	600	£ 17	1.4
1957	3700	£207	10.0
1960	7100	-	-
1961	8800	£599.4	27.7

The 1961 share of self-service shops in all food trading is estimated by the Journal "Self-service and Supermarket" to be 15.5 per cent.

A self-service shop may be either a converted existing shop or a newly built establishment. Changes are encouraged or retarded by a number of factors. The experience of the organisation concerned, whether multiple, co-operative or independent group, in techniques of self-service is a factor of major importance. Other factors include: a competitive situation in a particular area which demands vigorous efforts by a trader before he is able to expand his trade, or indeed in some cases, to retain his existing share; the availability of capital resources to carry out conversion or, in the case of a new store, to fix the more expensive fittings required by self-service; and finally the actual, and the apparent, attitudes of customers to the self-service technique, which may vary both geographically and socially. Since the middle 1950's a very high proportion of new shops built for grocery trading have been fitted for self-service trading. This is not the place to examine all the economic advantages of self-service shops, but it is important to see clearly the features which lead to the construction of new shops. These are: first, a large increase in population; second a great extension of built up areas, so increasing the distance shoppers have to travel; third the clearance of large numbers of existing shops in redevelopment schemes; and finally an increase in the demand for goods from a wealthier population. The conversion of existing shops will be undertaken when there is an increase in the intensity of shopping in a particular shopping centre, so that it becomes profitable for traders to make a more intensive use of space. An example of such a change of intensity occurred in 1954 when, following the removal of rationing in May, housewives began to do far more shopping in those centres where comparisons of price and quality were possible.[2]

In 1961 the regional distribution of self-service shops

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2. W.G. McClelland has quoted, in a lecture in Durham 1962, the following figures for seven "High Street" branches of Laws Stores Ltd. during 1954 (100 = monthly average in relation to all shops in the chain.

Feb., March, April	100	August	113
May	103	September	110
June	102		
July	101		

Ibid, "Economics of the Supermarket", Economic Journal 1962.

is remarkably even, and since it is often thought that these shops are predominantly found in Southern England the overall variations shown in Table 7.A are small. The regional variations which do exist conform to a south-north pattern. Without up to date information it is not really possible to show the relative significance of self-service in terms of the proportion of all grocery shops. An estimate based on the 1950 Census shows that this ranges from ten per cent in Southern England and North Midlands to seven per cent in the North West and South West, and to only 4.0% in Scotland and 3.2% in Wales (column four of Table 7.A). The regions which have high proportions (the national average is 5.8%) are those which in 1950 had a large average size of shop, or those which have shown the greatest increases in population since then. The relationship with the latter factor is clear. The less direct relationship with the size of shop is to be found in the economies of scale which self-service techniques can exploit, and so the introduction of the techniques has been associated with an increase in the size of shop. A priori it could be expected that where larger stores were already operating a faster rate of conversion was likely. The regional variations are the result of the interaction of these two features.

The pattern of ownership of self-service shops reveals far greater variations than the overall pattern. The regional mean deviation of the frequency of all self-service shops is 11.6%, that of co-operative owned shops is 37.5% and that of capitalist shops is 33%. These great variations are, particularly in the case of co-operatives, the result of poor representation in certain regions. If the four regions with the lowest frequencies are not considered the mean deviations become 11.4% for co-operatives and, significantly higher, 19.0% for capitalist trades.

(a) Co-operative Trading

Co-operative run shops are particularly infrequent in Greater London, the North and the South East, three regions which have particularly high overall frequencies of self service shops. In contrast co-operatives run relatively large numbers of self service shops in the North West, the North Midlands and Yorkshire. This pattern should be related to the distribution of all co-operative grocery shops (based on 1950 figures). The proportion of all grocery shops run by self service varies regionally for co-operatives very much in parallel with the overall variations of self-service shops. If however the proportion of all self-service shops owned by co-operatives is considered it will be seen that there are marked deficiencies in London and the North. In the former severe price competition has undoubtedly presented major problems to societies, the figure of 87.4% does however exaggerate the importance of capitalist traders for co-operative self-service branches tend to be larger than average. The North has been particularly slow to operate self-service shops for reasons which are by no means clear. It can be concluded that the knowledge and experience of self-service trading gained by the societies which first experimented with the technique has made it possible for the movement as a whole to establish shops of this type fairly uniformly over the country, with only a few major exceptions.

The distribution of societies which have no self-service shops does however reveal a most interesting pattern (figure 7.A). It is the result of the general trading pattern in each area, the lack of diffusion of self-service techniques through neighbouring societies, and the type of society. The general trading pattern clearly influences the high proportion of societies with at least one shop of this type found in Southern England (Table 7.B). The

Table 7.B Societies with at least one self-service shop

	Number	Percentage		Number	Percentage
North	29	30	Scotland	77	75
Yorkshire	44	36	London and South East	25	83
North Midlands	38	46	South West and Wales	60	50
South and East	46	75			
Midland	28	75	North West	65	40

diffusion of knowledge of the technique is important particularly in South Wales where an unexpectedly large number of societies have one self-service shop, and probably in the North where few operate shops of this type. The majority of the societies which do not have a self-service shop are found in the rather static areas of industrial England, where the Co-operative Movement is faced with falling memberships as population declines, the withdrawal of share capital, and an antiquated organisational structure, factors which all prohibit expensive innovations. In addition many societies retain near monopoly positions in some of the smaller settlements, and so there is no widespread necessity to compete with other traders by providing modern shopping facilities.

A comparison between Yorkshire, where there are a large number of societies with no self-service shop, and the South East illustrates this feature quite clearly. In the South-East and London only five societies have no self-service branches and two of these, Anchor and Gothic, are rather special single shop societies. The others are:-

Canterbury	10 branches	£390,783 sales.
Rainham	9 branches	£402,402 sales.
Rochester	23 branches	£1005,001 sales.

In October 1960 Canterbury was taken over by Co-operative Retail Services Ltd., and is now (1962) running two self-service shops. To successfully compete in this region the adoption of self-service is almost a necessity. The

Canterbury Society may well be a good example of this for C.R.S. Ltd. is known to "rescue" many societies which are suffering declines in trade.

Large societies are very important in determining the distribution of co-operative self-service shops, for it was these societies which initially had the resources to be able to experiment safely with the technique. In 1953 Evely[3] wrote: "the advantages of size are clearly borne out by an examination of the distribution of co-operative self-service shops between society and society". In 1960 however this is not quite so true, although all societies with over eighty branches run at least one self-service shop (Table 7.1) and the proportion of their branches operated by self-service is generally higher than that of the large multiples (Table 7.2) for some medium sized societies have far higher proportions of self service shops. Figure 7.B. shows the dispersion of values for societies by regional groupings. Societies with high proportions are almost all found in expanding areas or South Wales, the exceptions largely being small societies in Yorkshire and Scotland (figure 7.B). Individual exceptions do exist like Barrow and Stalybridge but these are very rare. Apparent exceptions like Sunderland[4] can be explained by

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3. R. Evely. Cartel Vol. 3. 1953, No. 6. P. 221.

4. Moser and Scott. op cit. show that Sunderland, the 22nd largest local authority, ranked 14th for new house construction and 3rd for local authority house construction.

their high rate of house construction, and hence need for new shops, since 1945. Societies which have high proportions of self-service shops are Birmingham, Portsea Island and West Somerset, all noted for their dynamic management. In general however the failure of the large societies to retain their dominance in the self-service technique is the result of the fact that they trade over areas which include both expanding and declining districts, for it is impossible immediately to liquidate the large amounts of capital tied up in shops in the latter districts. It is probably true to say that co-operative societies are far less quick to cut losses by closing uneconomical branches than capitalist traders.

(b) Capitalist Trading

The distribution of self-service shops operated by capitalist traders shows a "normal" south-north range in intensity. Three regional groupings may be distinguished (Table 7.A): first regions with at least one such shop to 10,000 people (i.e. the Southern Regions and the North); second regions with one store to between 12,000 and 15,000 people (i.e. the South West, Wales, Midlands and Scotland); and third regions with less than one shop to 17,000 people (i.e. the North Midlands the North West and Yorkshire). This division, except for the high frequency of these shops in the North, corresponds with many of the regional groupings which have been found to exist in various aspects of retailing. This exception is largely the result of a special concentration of two multiple organisations in the North - Allied Suppliers which account for 25% of self-service shops, and Laws' Stores Ltd. which account for 11% of these shops in the region.

More significant than the variations between regions are the variations within many of the regions. In the North, for instance, the frequency of these shops ranges from one to 6,713 people in Northumberland to one to 21,012 in Cumberland (Table 7.C). In the Midland region, where

Table 7.C Self-service Shops in Some Counties

	% shops (1950) s/s	Population Per s/s
Herefordshire	1.02	8183
Shropshire	0.80	8667
Staffordshire	0.70	5176
Warwickshire	1.16	6645
Worcestershire	0.68	11,847
Cumberland	0.38	21,012
Durham	0.96	9250
North Riding	0.50	15,837
Northumberland	1.20	6713

geographical contrasts are not so marked, variations range from one to 5176 in Staffordshire to one to 11,847 in Worcestershire. It is rare for more than one per cent of the number shops found in 1950 in each county to be operating by self-service in 1960. Although the trend is not completely clear it seems that relatively more self-service shops are found in counties which possess major cities.

Even in the Southern regions the majority of shops are found in the areas nearest to Greater London (figure 7.C). This trend is partly the result of the fast growth of population in such areas, but it is also a reflection of their character as the trading areas of various multiple organisations, which as chapter five has shown, are so closely connected with the conurbations.

Large multiple organisations (Table 7.2) vary quite considerably in the proportion of their shops which operate by self-service methods. On this basis they can be grouped into five types:

(a)	The Combines	11-27%	e.g. Allid Suppliers
(b)	Self-Service Specialists	over 20%	e.g. Tesco, London Grocers
(c)	Average Chains	10-20%	e.g. Sainsbury, Wrensons
(d)	Moderate Chains	under 10%	e.g. Melias, Walter Willson
(e)	Chains with no self-service		e.g. Greig.

These groups correspond fairly closely to the distribution of each chain, with only one (Wrensons) based outside London, which has more than 10% of its branches operating on self-service. In contrast to this it should be noted that both W.H. Cullen, which specialises in high class trade, and David Greig Ltd. are based in London and are not recorded as having self-service branches. The small number of self-service shops operated by Hillard and Gallons, the two Yorkshire based chains is both a reflection and a cause of Yorkshire's poor frequency of multiple self-service shops (one to 20,734 people).

The two specialist chains are of particular interest. Tesco's lower proportion of self-service shops is only a reflection of the size of its subsidiary John Irwin Litd. of Liverpool, which was acquired in 1960, and which then had no self-service shops. In 1961 two self-service shops are found to be operating in the subsidiary and the chairman reported "we have begun to convert these stores to self-service on the Tesco pattern." Apart from these shops Tesco only has stores in Bristol, Leicester and Stoke which are further than fifty miles from London.

London Grocers have a similarly restricted distribution, but their subsidiary, acquired in 1960, Swettenhams Ltd., was already operating self-service shops in the Potteries.

The large number of self-service shops which the large combines operate makes it of particular importance to examine the distribution of such shops in each combine. Although many of the sites which these companies own are unsuitable for conversion to the self-service technique, their great resources of capital have enabled them to overcome initial hesitancy as to the value of self-service trading, although as it will be seen, they still operate relatively small units. The average size of a sample of multiple self-service shops has been found[5] to be 1020 sq. feet. The

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5. <u>Self-service and Supermarket</u>. Annual Directory 1961 p.4.

average size of this type of the shops of Home and Colonial Ltd. is 795 sq. feet, of W. Duncan Ltd. 675 sq. feet and of Lipton Ltd. 953 sq. feet.

The Allied Suppliers Group operates 668 self-service shops. These are distributed between the various sub-companies in a most significant manner, with the regional chains having far higher proportions than the national chains of these shops. There has been a considerable amounts of experimentation within the combine to determine the best location. In 1954 the Chairman reported: "In many cases the position of the shop selected for conversion was nearby a self-service branch of an associated company, and this enabled us to see the effect thereon and to compare the final trading results, in other cases we have deliberately positioned them in certain areas to gain a particular experience." The pattern established by 1961 suggests that following this experimentation the combine has concentrated development in areas where self-service shops are as yet few (Table 7.D).

Edwards and Townsend[6] have written of multiple organisations "their main advantage lies in the fact that there are large indivisibilities of knowledge". The distribution

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6. R.S. Edwards and H. Townsend, <u>Business Enterprise, Its Growth and Organisation</u>, 1958 Macmillan, P.296.

Table 7.D. Allied Suppliers Ltd.

Company	Shops	s/s shops	% s/s	Area
Home and Colonial	649	51	7.9	National
Maypole	600	48	8.0	"
Pearks	500	56	11.2	"
Meadow	400	50	12.5	Semi-National
Lipton	434	62	14.3	National
Vye	49	18	36.7	Kent
Williams	75	45	60.0	North-West
Brough	75	32	42.7	North
Hadrian	87	28	42.7	"
Duncan	114	19	16.7	"
Galbraith	202	90	44.8	Scotland
Templeton	100	36	36.0	"
Mossey	85	29	34.2	"
Cochranes	150	38	25.3	"

of the shops of the national companies is fairly even throughout the country. (Table 7.E). Each organisation

Table 7.E. Distribution of Self-Service Shops National Chains of Allied Suppliers Ltd.

Region	Home & Colonial	Pearks	Lipton	Maypole	Total
N	0	0	3	1	4
Y	1	0	7	3	11
NM	2	2	2	3	9
E	3	7	4	5	19
L	5	11	11	8	35
SE	4	4	2	0	10
S	3	4	1	1	9
SW	2	2	1	1	6
M	0	12	0	1	13
NW	6	0	1	2	9
Wales	3	0	3	1	7
Scot.	1	0	11	5	17

however appears to favour rather different types of site, or perhaps more correctly, it has been policy for each to investigate the potentialities of different types. Home and Colonial branches are either found in expanding settlements like Ellesmere Port or important shopping centres like Peterborough or Bridgwater. Pearks has located its branches in centres of almost every type. Lipton and Maypole have favoured the more important shopping centres. Meadow has branches in the major secondary shopping centres of the large cities in its trading area.

The combine with the highest proportion of its branches operating by self-service is the International Tea Company's Group. This is only to be expected for the group is far more concentrated in the south than the other major chains. The importance of the South and London is noticeable even in the proportions of self-service shops of the constituent companies of the group.

Table 7.F. International Tea Company

Company	No. s/s	No. of shops	% s/s	Comments
International	109	553	19.7	London & South
Mason	65	497	13.0	Birmingham & Midlands
Payantake	32	32	100.0	31 in London
Quality	15	27	55.5	13 in London
Pegram	12	87	13.8	North West

The Weston group would not seem to have converted quite as many of its branches to self-service as the two groups discussed above, this may be partly only apparent for it is difficult to distinguish which of its branches are grocery and which bakery. However there is another explanation for Weston has been particularly active in Supermarket development (Table 7.G), concentrating available capital in

Table 7.G. Weston Group

Company	No. s/s	No. of shops	% s/s	Comments
Thomas Scott	17	183	9.3	Liverpool
Arthur Davy	5	41	12.2	Yorkshire
Stewarts Cash	23	104	22.1	Belfast
Hudson	7	28	40.0	London
Fine Fare	72	72	100.0	Home Counties
Forrest Stores	7	57	12.3	" "
Burton	20	200	10.0	Midlands
Cooper & Co.	31	187	16.5	National
L & N	15	111	13.5	North
Shentall	13	74	17.5	Chesterfield

large units. In addition to the supermarket development it may well be that there is a slight difference in general policy. The 1961 Chairman's reported stated "The more traditional type of grocery retailing is not being neglected however, as in our view there is considerable scope for development of this in areas which are not suitable for supermarker and self-service trading."

The Moores Group has even a smaller proportion of self-service shops without the offsetting large numbers of supermarkets. This must clearly be related to the speed of expansion of the organisation, and the situation of the majority of its branches in Northern England. It does in fact form a contrast with the International Tea Company being based in an area where self-service development has been slow. An attitude similar to that of Garfield Weston may be distinguished from the 1961 Chairman's Report:-

> "I am convinced that there must always be a place in Great Britain for both the friendliness of Personal Service and the Self-Service method of trading, but we are not fully convinced that our future depends on embarking too quickly into the scramble to open larger and larger supermarkets at increasing rentals and very expensive fitting out costs."

Multiple organisations with under one hundred branches vary very considerably in the numbers of self-service shops they operate (Table 7.H). There is a slight correlation

Table 7.H. Large Medium Multiples

Company	No. of s/s	No. shops	% s/s	H.Q's
Phillips	84	97	87	Gt. London
Thompsons Red Stamp	14	91	15	Gateshead
Worthington Cash	35	87	40	Leicester
Associated Dairy	0	87	0	Leeds
Williams Bros.	7	85	8	London
W.H. Low	18	74	24	Dundee
Redman	14	72	19	Manchester
S. Forest	7	66	11	Redhill
Budgen	18	64	18	London
Hawkins	3	56	5	London
W. Cussons	32	55	58	Hull
Cave	8	52	15	Lewisham
Bishop's Stores	38	50	76	London

between the proportion of self-service shops and the area in which each chain trades, but this is by no means complete. The two companies with the highest proportions of self-service shops are based on London and the one with the lowest is based on Leeds. Other companies however with high proportions of self-service like Worthington's Cash Stores and Cussons are based outside Southern England.

Smaller multiple organisations which operate self-service stores are numerous. Some are more significant than others either because of their recent growth or because of particular management decisions. The distribution of these chains is of interest for it emphasises the dominance of London in the diffusion of the new technique.

Table 7.I. Multiples with under 50 branches

London (8)			North (4)			South (4)		
Company	s/s	Total	Company	s/s	Total	Company	s/s	Total
Jackson	32	32	Laws (Tyneside)	45	48	Johnson (Bedford)	11	22
Waitrose	30	30	Hinton (Teeside)	24	46	Mills (Bristol)	11	13
Harris	30	30	Adscega (Manchester)	15	15	Russells (Plymouth)	10	12
Pricerite	18	20	Lennons (St. Helens)	12	12			
Wallis	9	17						
Reynolds	15	15						
Niema	15	15						
Robinson	8	11						

The distribution of self-service shops is a unique reflection of the interaction of major characteristics of the geography of retailing. The size of existing shops, the distance of which people are prepared to travel (for the most profitable application of the technique depends on a large market), the acceptance of the trading method by customers and, the trading areas of organisations with the resources and the experience to make conversions, all have profound effects on the distribution. The size of self-service shops is a subject of special importance for the larger ones are leading to a fundamental change in the geography of retailing. In North America "one-stop" food shopping is well established and, although the British pattern is far from this, there is a great contrast between shopping at a food store of 5,000 sq. feet sales area than at a parlour shop. The distribution of large self-service shops cannot be fully examined as yet, but data is available for an analysis of those classified as supermarkets.

Supermarkets

A supermarket in the United Kingdom is defined[7] as "a store of not less than 2,000 sq. feet sales area, with three or more checkouts and operated mainly on self-service, whose range of merchandise comprises all food groups, including fresh fruit and vegetables, plus basic household requisites (i.e. soaps and cleaning materials)". The classification of shops by "self-service and supermarket" has depended on the availability of full data on individual shops, and although in the majority of cases this has been forth coming, some deficiencies have been observed in the data. In general however McClelland's[8] conclusion that "these

7. Self-service and Supermarket op cit P.6.
8. W.G. McClelland, op cit p. 156, cites the addition of 24 Tesco Supermarkets to the 1961 list for their sales areas had previously not been reported. In 1960 however four were listed, not noted by McClelland, the company report in July 1961 states that nine were built during the trading year, so elevan existing supermarkets are only unaccounted for.

weaknesses do not materially affect the conclusions that can be drawn from the data" applies fairly well even to a geographical analysis. In 1960 the definition of a supermarket was slightly adjusted with the introduction of the "three check-out" clause in the definition. This change excluded 36 stores previously classified as supermarkets. It has however introduced more precision into the classification for there is a far closer relation between sales, and both the sales area and number of checkouts than with one or the other of these two features. It means however that yearly figures are not quite directly comparable (this has affects on figures 7.D and 7.E).

The distribution of supermarkets is very closely parallel to that of self-service shops as a whole (Table 7.J). There are however some noticeable differences. Regionally they account for between 10.5% of all self-service shops in the North Midlands and only 3.2% in Wales. On this basis regions may be grouped into three categories: the first includes all those with a proportion of over 9.7%, and consists of the four southern regions in addition to the North Midlands; the second includes regions with supermarkets making up 7% of their self-service shops, and includes the South West and the North West; and the third includes all the other regions since they have values of under 6%. Regional variations in frequency are greater than for self-service shops, the mean deviation being 42%,

Table 7.J. Regional Distribution of Capitalist and Co-operative Supermarkets 1961-1962

	Number			Population Per Shop (000)			Percentage of s/s		
	Capital.	Co-op	Total	Capital.	Co-op	Total	Capital.	Co-op	Total
N	19	8	26	181	465	124	5.7	5.9	5.7
Y	8	18	26	443	232	152	4.0	6.0	5.4
NM	21	34	55	202	107	66	9.0	10.5	10.5
E	49	8	57	76	467	66	10.7	3.7	9.7
G.L	114	28	142	72	292	57	10.0	16.7	10.0
SE	37	3	40	79	973	73	12.2	2.3	10.3
S	46	6	52	66	507	59	14.3	3.0	9.9
SW	20	16	36	160	199	95	9.1	5.7	7.2
M	14	13	27	339	366	176	4.4	3.7	4.4
NW	34	28	62	193	235	106	11.3	5.5	7.5
Wales	7	3	10	377	264	264	3.4	2.9	3.2
Scot.	9	19	28	574	273	185	2.1	6.7	4.0

and there being one supermarket to 57,000 people in London and one to 264,000 in Wales.

Capitalist and Co-operative supermarkets are found in rather different regions. Co-operative ones have two rather exceptional regional characteristics. In ten regions they only account for less than 6.7% of self-service shops. In London (16.7%) and the North Midlands (10.5%) they account for far higher proportions. The high percentage in London is partly the result of the low proportion of self-service shops found there, in fact these supermarkets have an approximately average frequency (one to 293,000 people, whereas the national average is one to 276,000). The high figure of the North Midlands is a reflection of an absolute high frequency (one to 107,000 people). It is the result of the activities of two large societies, Nottingham with 18 and Leicester with 9, which account for 27 out of the 34 co-operative supermarkets found in the region. These two societies in fact account for half of all the supermarkets in that region.

The greatest contrast in the location of supermarkets and self-service shops is the type of shopping centre in which the two types of shop are found. The population which a supermarket requires within its trading area cannot as yet be predicted with any accuracy for a given type of centre, but clearly a store which has an average weekly turnover of £4,462[9], requires a large number of customers on which to draw. The average number of individual customers is estimated to be 3,117, so a store would require a population of at least 10,000. These features necessitate a location in an important shopping centre. On the other hand since supermarkets require large areas of land, both for construction and for car parking (whenever possible), they are not found to any great extent in the centres of the most important shopping centres, for in such places land costs would be too high. Furthermore a supermarket is trading essentially with convenience goods, and should in consequence not be located too far from a customer's home. The overall effect of these requirements has been described by McClelland[10]:

> "In Greater London ... there was a unique density of population, and High Streets with extremely high housewife traffic, whilst at the same time the West End removed in large measure from these peripheral shopping centres the competition for sites of the major department stores and high class speciality shops. In places like Croydon, Kingston, Wimbledon, Finchley and Harrow there was thus a unique specialisation of customer traffic, not found in provincial city or town centres, of a density not found in their suburbs."

Supermarkets are therefore found above all in high density suburban shopping centres. In London they are located

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9. Self-Service and Supermarket, op.cit. P.6.

10. W.G. McClelland op.cit. P.158.

in a wide variety of shopping centres, but there are marked concentrations in the most important shopping centres, which average at least two supermarkets and account for about fifty percent of the total number. Table 7.K. shows

Table 7.K. Location of Supermarkets in Greater London Probable relationship to the Hierarchy of Shopping Centres as distinguished by Smailes and Hartley

	A	A-	B	B-	C+	C	C-	Others
No. of Centres with a supermarket:								
Capitalist	11	14	6	13	7	13	5	1
Co-operative	4	1	1	3	4	4	6	4
Total No. of supermarkets:								
Capitalist	23	25	10	17	11	15	5	1
Co-operative	4	1	1	3	4	4	6	4
Total	27	26	11	20	15	19	11	5
Total No. of centres	11	17	16	25	23	64	63	-
No. Per Centre	2.4	1.6	0.7	0.8	0.7	0.3	0.2	-

the relationship between supermarkets and the hierarchy of shopping centres as distinguished by Smailes and Hartley.[11] The range of significance from one centre to another is considerable, for "C-" centres are defined as those "that have developed beyond a mere group of neighbourhood shops" and are indicated most usually by a Woolworth's store. The

11. Smailes and Hartley *op.cit.*

general fall in the numbers per centre is fairly steady, but it should be noted that there is a great contrast between the "A-" group and the "B" group a fact which supports the division of centres at this point. It should be noted however that there would seem to be no difference between B centres and C+ centres.[12] A further most sifnificant contrast is that between the location of capitalist and co-operative supermarkets:-

Centres	Percentage Capitalist (a)	Percentage Co-operative (b)	Relation of (a) to (b)
A	42	17	0.4
B	23	14	0.6
C	27	50	1.8

A co-operative supermarket is in fact typically found in an L.C.C. housing estate (the four classified in the "other" category) whereas the capitalist supermarket has been located in busy High Streets.

The significance of suburban shopping centres is not limited to London, even small conurbations like Bournemouth and Southampton reflect this pattern.[13] Fine Fare Ltd. has,

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12. see page 205 for a similar finding.

13. The significance of suburban shopping centres in self-service development as a whole can be seen in the West Midland Conurbation in Figure 7.F, which shows how there were no self-service shops in the C.B.D. of the conurbation in 1960 (The Bull-Ring Development will have altered this to some extent).

for instance, branches at Poole and Christchurch, and at Bitterne and Shirley, but none in the central shopping areas of the two conurbations. In the Tyneside Conurbation the only supermarkets in Central Newcastle are the central premises of the Co-operative Society and the food hall of Bainbridges' Department Store.

The problem of defining a "suburban shopping centre" is enormous for every town is to some extent subsidiary to another. Some areas may however be distinguished which, without being continuously built up (conurbations), have distinct urban characteristics, these have been termed urban tracts.[14] Adding to Robinson's urban tracts a number of smaller areas of a similar character table 7.3. shows the numbers of supermarkets in each tract in 1961. In all, only 72 supermarkets (52 Capitalist and 20 Co-operative) are found outside these special urban areas, in 56 different towns. All but seven of these supermarkets are found in urban areas with a population over 10,000, and in general it can be said that the smaller the place the faster has it grown in population during the period 1951-61 (Table 7.12). Significantly a smaller proportion of these co-operative supermarkets are found in small towns than capitalist ones, for it has essentially been the largest societies which have

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14. G.W.S. Robinson, "British Conurbations in 1951: Some Corrections", Sociological Review Vol. 4, 1956, PP.91-97.

developed supermarketing. Another significant difference between the two types of ownership is that the small towns which have a co-operative supermarket are expanding less quickly than those with a capitalist store. These towns are in fact located in the traditional areas of co-operation which have remained relatively stagnant in recent years.

The development of supermarketing by different organisations has had a considerable influence on its location. McClelland[15] has suggested that one of the reasons for the slow growth of supermarkets in the provinces has been the necessity for organisations based there of acquiring experience of this type of trading. The innovators were almost all based on London. In 1958 three companies had 41 out of 69 capitalist supermarkets, and it has been only gradually that others have acquired the necessary techniques (Table 7.L). Outside Southern England supermarkets are operated by a small number of organisations, which having made the initial "act of faith" are able to draw on information from their existing shops in order to plan new ones. In fact however only four organisations not part of a combine operate significant numbers of supermarkets in the provinces. These are Laws Stores Ltd., Lennons Ltd., Gateway Ltd. and Carline.

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15. W.G. McClelland <u>op.cit</u>. P.158.

Table 7.L. No. of Supermarkets by Organisation*

	1958	1959	1960	1961	Area
Finefare	22	31	40	72	London
Coopers	6	10	12	25	National
Burtons	1	5	7	15	Midland
L & N	1	1	2	6	North
Victor Value	2	12	13	34	London
Premier	15	18	17	23	"
Anthony Jackson	4	6	13	14	"
Maypole	-	1	2	8	National
Laws	-	1	3	6	North
Elmo	-	-	-	6	East
Lennons	-	-	1	6	North-West
Total	51	86	124	215	
% of multiple supermarkets	74	74	73	68	

* only those operating six in 1961 considered.

The extension of the new technique can be examined in figures 7.D and 7.E. In 1958 the regional figures give a fairly adequate impression of the actual distribution. In 1960 however concentrations have become marked. The importance of the Nottingham, Bristol and Leicester Co-operative Societies is noticeable. Towns in the Home Counties have numbers of supermarkets, following the gradual development of these counties by organisations based on London. Slough and Welwyn Garden City, for instance, both had four supermarkets (Slough increased in population during the period 1951-61 by 14,032 and Welwyn Garden City by 16,140).

By 1961 more marked concentrations of supermarkets may be noted. During 1960/61 development was particularly found in Lancashire, in Portsmouth, in Southampton and in Glasgow. There was therefore a marked growth in areas of mass working class populations. One especially noticeable feature during this period, commented upon by many observers, has been the tendency for organisations to colonise areas in which others are known to be achieving good results. Thus it would seem to be often taken as axiomatic that the attraction of two supermarkets, in a given shopping centre, is always more than twice that of one. In general it may be noted that supermarkets are concentrated in those areas where self-service trading as a whole is well established. This brief account may be concluded with the following words of McClelland : [16]

> "Supermarket development depends on, as well as itself affecting, the whole social, economic and geographical pattern of the community in which it occurs".

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16. W.G. McClelland   op cit.   P.169

Group Trading

A further innovation in retailing during the last ten years has been the introduction of the group trading schemes which link wholesalers and retailers far more closely than before. "The chief weakness of the independent trader is that he uses far too many channels of supply."[17] This weakness is being attacked by different types of grouping. To the geographer two aspects of this phenomenon are of interest: the location of the independents which join groups, and the spatial structure of the groups themselves. The causes of the movement are numerous.[18] The overall effect however is considerable. (Table 7.M.).

Table 7.M. Independent Retailers: Percentage in Symbol Groups in the Grocery Trade

Date	% shops	% sales	% self-service
Dec. 1958	19	30	
April 1960	29	43	
Dec. 1960	34	50	
June 1961	35	53	49.5

sources : A.C. Neilson Survey (quoted by Financial Times)
Self-Service and Supermarket Directory 1961.

The group schemes may be divided into three types: there are first retail buying groups and retailer owned wholesale

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17. Cynog-Jones, Giants in Wholesaling, P. 3, Union of Shop, Distributive and Allied Workers (undated, 1960?).

18. Christina Fulop, Buying by Voluntary Chains, Allen and Unwin, 1962.

undertakings, in which there are considerable degrees of freedom to the individual trader; second are voluntary groups organised by individual wholesalers; and third, and most important, there are voluntary chains in which numbers of wholesalers and retailers are grouped, and in which integration is greatest.

There are five voluntary chains in 1962, they have the largest memberships, with one exception (the Danish Bacon Co's Star Traders), and in terms of sales are the most important of all types of group scheme. They are:-

Mace Marketing Services Ltd.	3400 retailers
Spar (Britain) Ltd.	2500 retailers
Vivo (Family Grocer Alliance) Ltd.	2500 retailers
Centra	2100 retailers
V.G. Services Ltd.	2000 retailers
Total	12,500 retailers

These chains include a number of wholesalers and a number of retailers subsidiary to each wholesaler member. Table 7.N shows an estimate of the regional distribution of the members of all the groups except Centra. This must, however, be taken as a very broad picture for the data on which it is based is very scattered[19], and sometimes it has been necessary to estimate the number of traders found in certain regions. The regional distribution of these traders is summarised in Table 7.0.

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19. In fact the most common type of "raw" data was a list of wholesaler members with the numbers of their associated retailers, something which largely ignored standard region divisions.

Table 7.N. An Estimate of the Distribution of "Group" Retailers 1962

	N	Y	NM	E	L	SE	S	SW	M	NW	Wales	Scot.
Spa	186	324	338	134	258	126	143	350	299	466	128	186
V.G. Service	360	?	225		400		760*	120*	225*	350*	0	0
Mace	198	394	255	275	X	388	305	467	294	995	200	139
Vivo	155	220	210	135	220	301	235	175	215	280	0	50
Wavy Line					1500							
P. Keevil					900				100			
A. Button					500							

* TAM areas

Table 7.0 Retailers in Voluntary Chains

	Members	Population per Member	% of Independent Grocers (1950)
North	899	3600	15
Yorks and NW	3029	3500	10
Midland and NM	2061	4700	10
South West	1112	3100	19
Southern England	3140	5600	12
Wales	328	8000	2
Scotland	375	14000	1

The membership of these groups is remarkably evenly spread over England, but there are relatively few members in Wales and Scotland, two areas in which severe competition has been absent. Inter-group differences do, of course, exist but even these seem to be small. Some of the variation which is apparent in the table is due to the deficiencies of the data. Thus the high figure recorded for the South West is partly the result of wholesalers based on Bristol and Gloucester supplying traders in Monmouthshire. For the most part however the figures are reasonably accurate. The high figure of the South West would seem to suggest that the village store is a particularly important type of recruit of these chains.

The average figure recorded for Southern England is a great surprise for it might be thought that since competition is so much greater there far more retailers would be likely to join voluntary chains. Mace has in fact no wholesaler member nearer to London than Croydon or Farnham.

Charles Arkcoll Ltd. with depts at Croydon and Maidstone with 268 members.
W. Kingham & Sons with a depot at Farnham with 120 members.

Offsetting this poor performance of the voluntary chains in the Home Counties is the existence there of a number of large wholesaler organised groups. They are:-

Kinlock's Ltd. - Wavy Line Grocers	1500 members
Peter Keevil Ltd. (a subsidiary of Weston) Alliance of Individual Grocers	1145
Alfred Button	500

The majority of these traders are found in the four southern regions. Keevil has a hundred branches subsidiary to its warehouse in Worcester, and Button serves some from its warehouse in Northampton. Most members however are serviced from Burgh Heath and Seer Green by Kinlock, from Harold Hill by Keevil, and Merton and Woodford by Button.

Smaller group schemes show a similar southerly orientation:-

I.G.V.G. (R. &. J. Pamment Ltd.)	Southend	250
Shore Valley Scheme	Medway	240
Target Scheme	Home Counties	340
P.G.A. (Patrick, Grainger & Huntley Ltd."	"	200
Peg (Lines and Norfold Dairies Ltd.)	Kings Lynn	110
Association of Private Traders	Midlands & SW	187
	Total	1327

Two of the largest schemes are however national in extent. It is however not possible to give any account of the distribution of their members. The Danish Bacon Company operates a scheme termed "Star Retailers", which has 5,300 retailers. These are serviced from the normal D.B.C. warehouses which are distributed fairly evenly throughout Great Britain. The P.G.M.A. (Private Grocers Merchandising Association) is a very loosely organised group with over 4,000 members.

Group trading schemes other than the Symbol Voluntary Chains and the schemes of D.B.C. and P.G.M.A. have a membership of over 4,000 in Southern England. This is equivalent to 15% of the independent traders recorded there in 1950. If the membership of the Voluntary Chains is added to this figure nearly 7500 retailers or 27% are "linked" in some scheme or other. This is a far higher proportion than that found elsewhere. The presence in the region of large wholesalers like Keevil and Kinlock has clearly provided retailers with an attractive alternative to the voluntary chains (in general the latter exercise a more rigid control over their members than the wholesalers groups). The cumulative effect of the competition of vigorous multiple organisations and self-service trading has forced the independent in this area to shelve some of his independence in order to survive. The differential working of the competitive process is bringing in its train profound differences in the geography of retailing, and as more data becomes available, from which changes at different times and in more precise areas may be analysed, the full working of these processes may be examined.

The geography of retailing is essentially concerned with variations of intensity rather than with the absolute differences between places. This chapter has shown how changes are taking place at different rates in different parts of Great Britain and so it forms a logical conclusion to section three which has set out how the organisations operating in retailing (i.e. the decision makers) affect the various elements of retailing. In general it is very important to realise that these aspects of geography should be considered quantitatively as well as qualitatively. As yet however the data that can be accumulated is not amenable to much quantitative investigation.

Table 7.1. Co-operative Societies with over 80 branches

Society	No. of s/s shops	Total No. of shops	% s/s
London	32	588	5
Royal Arsenal	72	251	28
South Glasgow	18	217	9
Birmingham	120	186	66
South Suburban	33	170	20
St. Cuthbert (Edinburgh)	52	167	32
Bristol	68	151	46
Nottingham	45	151	30
Leeds	13	143	11
Liverpool	28	127	26
Newcastle	10	125	8
Barnsley	25	122	21
Leicester	45	120	38
Birkenhead	41	119	34
Derby	40	118	33
Portsea Island	79	117	67
Burslem	10	104	10
Manchester	55	102	55
Bolton	29	101	29
Enfield	11	101	11
Hull	17	100	17
Clydesbank	25	94	24
St. George (Glasgow)	1	87	1
Brightside (Sheffield)	12	86	11
Walsall	27	85	26
Cowlairs	4	81	5

Table 7.2. Large Multiples and Self-Service Shops

Organisation	Number s/s	Number Total	% s/s	Geographical Extent
Allied Suppliers	668	3534	18	National
International Tea	369	1390	27	England & Wales
Weston Group	147	1211	12	National
Moores Group	91	1031	11	"
Melias	21	600	4	West, Midlands etc.
United Dairies	55	475	12	Greater London
Tesco Stores	202	352	57	South and NW
Express Dairies	69	288	21	Southern England
Sainsbury	35	264	13	Southern England
Gallons	-	241	-	Yorkshire
David Greig	-	230	-	Southern England
London Grocers	192	223	86	Southern England & Midlands
Peglers Stores	10	194	5	South Wales
Walter Willson	15	181	8	North
Thrift	22	164	13	Yorkshire
Cullen	-	160	-	Southern England
W. Jackson	13	145	9	Yorkshire
Hillard	6	132	5	Yorkshire
Wrensons	16	121	13	Birmingham

TABLE 7.3. LOCATION OF SUPERMARKETS

(a) According to Robinson's Urban Tracts (R)* and various Other Groupings by Standard Region.

Region	Area	Capitalist	Co-operative	Total
NORTH				
	Tyne-Wear (R)	14	7	21
	Tees-Hartlepool (R)	3	0	3
	Remainder	1	0	1
EAST & WEST RIDING				
	West Yorkshire (R)	2	5	7
	South Yorkshire (R)	1	10	11
	Hull	3	4	7
	Remainder	2	1	3
NORTH MIDLAND				
	Nottingham - Derby (R)	6	18	24
	Leicester	4	9	13
	Northampton	4	1	5
	Remainder	3	4	7
EAST				
	Hertfordshire, Essex, Luton and Dunstable	42	5	47
	Remainder	7	3	10
SOUTH				
	Buckinghamshire, East Berkshire	12	0	12
	Bournemouth	6	1	7
	Southampton	7	0	7
	Portsmouth (R)	10	4	14
	Remainder	7	1	8
SOUTH WEST				
	Bristol (R)	7	12	19
	Remainder	13	4	17
MIDLAND				
	West Midlands (R)	3	5	8
	Stoke (R)	4	4	8
	Coventry	2	2	4
	Remainder	5	2	7
NORTH WEST				
	South Lancs. B.1. (R)	22	26	48
	South Lancs. B.2. (R)	0	1	1
	Remainder	12	1	13
Wales				
	South Wales West (R)	2	0	2
	South Wales East (R)	4	2	6
	Remainder	1	1	2
SCOTLAND				
	Glasgow (R)	8	8	16
	Edinburgh (R)	0	8	8
	Remainder	1	3	4

(b) Those located outside the Urban Tracts named above:-

1. Capitalist Stores

Population % change 1951-61	Size of Town (000) Under 10	10-30	30-50	50-70	Over 70	Total
Decrease			1		4	5
x 0-5				3	1	4
x 5-10		4	2	1	4	11
x10-15		4		1	2	7
x15-20	2		3	1	1	7
Over 20	1	1	3			5
Total	3	9	9	6	12	39

2. Co-operative Stores

	Under 10	10-30	30-50	50-70	Over 70	Total
Decrease		1				1
x 0-5		2			1	3
x 5-10			1	1	2	4
x10-15	1	1		1	1	4
x15-20					1	1
Over 20		1				1
Total	4	5	1	2	5	17

Additional three supermarkets in settlements which are not urban administrative areas.

x Robinson op. cit.

x South Lancs. B.1. includes Liverpool and Manchester
South Lancs. B.2. includes Burnley and Blackburn with Accrington, etc.

SECTION FOUR

THE BUSINESS DISTRICTS OF COUNTY TOWNS: A CASE STUDY

Part Four

CHAPTER EIGHT

The Business Districts of County Towns : A Case Study.

The pattern of retailing analysed in the preceding chapters has been shown to have two major components - one of regional and the other of hierarchical character. The shops of any town have a specific character depending upon the town's regional position, particularly in relation to the conurbations, and its importance as a shopping centre for a surrounding region. It is convenient to examine these two features in a number of towns in order to illustrate their full significance. In the Introduction it was shown how this is best achieved by taking a class of towns, the English County Towns, for study. These towns had in fact been found to have distinctly characteristic shops at an early stage of this investigation.

The County Towns are major shopping centres for rural hinterlands. They form part of the third order of centres, but are distinguishable from other places in that order by the nature of their hinterland. Smailes [1] wrote: "their roles are clearly those of intermediaries between the metropolitan areas and the rural fringe", and was in the main considering them as administrative centres or wholesale distribution

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1. A.E. Smailes (1946) P. 98.

centres. Precisely which centres may be called County Towns is a subjective question, some are clearly typical but there are others which are less so. Table 8.A. lists the places which might be considered to belong to this class. Listing these towns leads to the conclusion that a rather more

Table 8.A. Some Important Shopping Centres : Population and Rank (Carruthers)

3A		3B		3C	
Norwich	119,904	Worcester	65,865	Winchester	28,643
Ipswich	117,325	*Bedford	63,317	Aylesbury	27,891
Oxford	106,124	*Peterborough	62,031	Hitchin	24,243
York	104,468	*Maidstone	59,761	Hertford	15,734
Cambridge	95,358	Lancaster	48,887	Evesham	12,608
Exeter	80,215	Wrexham	35,427		
Lincoln	77,065	Taunton	35,178		
Carlisle	71,112	Canterbury	30,376		
* Gloucester	69,687	Boston	24,903		
* Chester	59,283	Yeovil	24,552		
Shrewsbury	49,726	Bangor	13,977		
Hereford	40,431	Aberyatwyth	10,418		
		Caernarvon	8,998		

* Excluded because of extensive suburban developments.

precise division than that of Smailes might be:-

(a) Rural Regional Capitals - all those towns above Lincoln (with Lincoln and Carlisle as marginal cases)
(b) County Towns - all those towns above Canterbury
(c) Major Market Towns - the remainder.

The hierarchical status of a town is the result of its size and of its distance from towns of higher rank. Table 8B sets out this second factor. It shows that some of the County Towns are found quite close to more important centres, while others are far more isolated. These variations are of great significance both in determining the type of shops found in each town and in producing differences in the rank of the towns.

Table 8.B. County Towns : Distance From Large Towns

County Town	Miles	Large Town	County Town	Miles	Large Town
Carlisle	52	Newcastle	Taunton	27	Exeter
Hereford	47	Birmingham	" "	37	Bristol
" "	45	Cardiff	Worcester	25	Birmingham
Shrewsbury	40	Birmingham	Salisbury	25	Bournemouth
Lincoln	32	Nottingham	" "	20	Southampton

Andrews and Friday [2] have described the competitive process in retailing in the following terms:-

"All shops in urban areas are enmeshed in a complex chain of competition for patronage which is most intense within any one area but which will have important linkages between adjacent areas as well as between them and regional "shopping capitals".

It is the geographer's task to attempt the extremely difficult process of delimiting and explaining the various spatial aspects of this competition. The selection of a regional, rather than a hierarchical, cross section of towns means that this case study is particularly concerned with the "important linkages between adjacent areas" and the intense area of competition, rather than the links with other centres of similar or higher rank. The fact that the County Towns are a hierarchical unit will emerge from the following account,

2. P.W.S. Andrews & F.A. Friday, Fair Trade: A Study of Resale Price Maintenance, 1960

and it will also be seen that there are very real links, in terms of competition, with cities of higher rank.

The characteristics of a town's retailing which might be examined are many, and a number of them, not included in this account, have in fact been investigated as preliminary studies for this thesis, it being impossible to understand the nature of a town's shops without detailed local studies. The characteristics which are of concern here are those which have already been mentioned in earlier chapters of this thesis, it being the major purpose of this chapter to simplify and explain them in terms of specific examples, rather than to introduce new elements into an already complex study.

AGGREGATE RETAIL TRADE [3]

The special character of County Towns as the centres of extensive business districts may first be seen from a comparison with other towns of similar size. In chapter three it was concluded that aggregate census statistics are only directly useful in comparisons of this sort. Table 8.C. shows some of the most significant towns with a population between 20,000 and 75,000 (all other towns of this size are not worth comparing with the County Towns for they have lower sales, smaller and usually fewer shops). This table shows figures for sales per head of population, sales per

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3. This section refers to retail trade, not all the distributive trades as did Chapter Three (i.e. it uses data from Vol.2 rather than Vol. 1, of the Census).

establishment and population per establishment, it also shows index figures comparing these ratios with regional average figures.

Table 8.C. County Towns and Other Important Centres: Features of Aggregate Trade.

	S/H (£'s)	P/E	S/E ('00s)	Index Numbers : Number of Times the Regional Average S/H	P/E	S/E
Carlisle	147	83	122	1.6	0.85	1.3
Lincoln	143	74	104	1.5	0.90	1.3
Worcester	211	74	156	2.2	0.92	1.8
Shrewsbury	167	82	135	1.8	0.91	1.6
Hereford	186	71	132	2.0	0.79	1.6
Salisbury	172	74	128	1.8	0.75	1.4
Taunton	182	84	154	2.0	0.85	1.7
Gloucester	157	90	141	1.7	0.90	1.5
Exeter	143	88	124	1.6	0.89	1.4
Chester	241	55	135	2.4	0.72	1.9
Canterbury	185	69	127	1.8	0.74	1.3
Chelmsford	191	86	164	1.9	0.92	1.7
Tunbridge Wells	174	70	119	1.7	0.74	1.2
Guildford	191	86	164	1.9	0.92	1.7
Scarborough	198	50	101	2.1	0.51	1.1
Bedford	171	75	127	1.8	0.75	1.3
Peterborough	156	72	113	1.6	0.88	1.2
Cheltenham	142	88	151	1.5	0.89	1.5
Lancaster	124	82	102	1.0	0.88	1.4

County Towns are not distinguishable from the other important shopping centres in the number of their shops, except that in contrast to these other centres they have an overall homogeneity in this feature. There is only a range of thirteen people per shop (Hereford 71 and Taunton 84). Some of the other towns have relatively few people per shop. Of these Scarborough and Chester have already been examined in chapter three. The index figure comparing the actual figure with the regional average figure shows that the County Towns are homogeneous, and that there are a number of other towns which have an extreme character. Towns like Scarborough, Chester, Canterbury and Tunbridge Wells have relatively large numbers of shops, while Guildford has few shops.

In sales per head of population County Towns may be distinguished as places with a relatively high level of sales. Five of the seven towns have a figure over £167. They are however not the only towns to have such high sales, Canterbury, Guildford, Scarborough and Chester all have similarly high sales. The index figure shows that all the towns apart from Carlisle and Lincoln had sales over 1.8 times the regional average. It would seem however, that there is little to distinguish the County Towns from the other towns in the table.

Both Lincoln and Carlisle would seem not to belong to the County Town type from an examination of these figures. In their cases it is clear that the hinterland population cannot balance with its purchases the relatively lower spending power of the industrial populations of these two towns. The towns do therefore have a relatively low average of sales per head of the resident population.

County Towns are chiefly distinguishable in terms of their average size of shop (see chapter three). Shrewsbury, Taunton and Worcester are only surpassed by Guildford and Chester in this characteristic. Carlisle, Salisbury and

Hereford also have an average sized shop of over £12,200. There are six of the seven County Towns and eight other towns out of twelve with such sized shops. Five of the County Towns do in fact have the largest sized shops if exceptional towns are excluded. These exceptions are Chester (see P.118), Guildford and Cheltenham, all of which have a very high proportion of upper class inhabitants (customers who trade particularly in stores like Department Stores and who are relatively highly mobile).

Lincoln has particularly small shops (£10,400), and although this is to some extent accounted for by a low regional average figure (the shops are 1.3 times larger than the regional average, a figure equal to that of Carlisle), it would seem that a special factor may be in operation. As an important regional centre Lincoln would be expected to have a larger size of shop. Carlisle also has a relatively small average size of shop, something which is rather more easily explicable in terms of a low proportion of large scale retailers (i.e. multiples), which is the result of Carlisle's relative isolation. The point is that in neither case must this small size of shops be accounted for in terms which would exclude the town from the County Town type, in both there are special factors operating which at least to some extent account for their exceptional features.

TRADE TYPES

Retail sales of individual trade types in relation to the resident population of a town are a most useful measure of the relative attraction of a town (see chapter four). Table 8.D. is an attempt to estimate the population served by the shops of each trade in the County Towns. It is based on a weighting of expenditure equal to the regional average.

Table 8.D. Population (000's) Outside the Town Supplied by Shops in the County Towns, Estimated at Regional Level of Per Capita Sales.

	Carlisle	Lincoln	Worcester	Shrewsbury	Salisbury	Hereford	Taunton
Total Retail Sales	39	34	76	35	30	31	34
Grocery Total	11	1.5	25	13	3.8	24	20
Other Food Total	20	30	26	1.8	19	10	15
Dairy	24	89	58	-2.7	-5.8	0.4	19
Butchers	1.0	23	18	8.7	12	4.5	24
Greengrocers	0.5	0.7	-7.7	28	34	11	29
Clothing Total	77	50	72	68	50	52	62
Boots & Shoes	110	68	68	61	108	64	51
Men's Wear	103	64	82	87	78	50	30
Jewellery	90	40	112	117	53	77	144
Confectioners	40	22	22	25	62	27	22
Books	10	55	82	20	65	20	47
Chemists	27	65	57	58	44	44	30
Furnishers	85	59	84	33	51	27	33

The population which is served by towns has been estimated by Green [4]. His estimates suggest that the County Towns could be listed in the following order of importance in terms of their fourth order hinterland populations:-

4. National Planning Atlas : Urban Accessibility Map. 1955

Salisbury	49,270	Worcester	37,140
Lincoln	49,180	Hereford	35,550
Taunton	46,214	Carlisle	28,600
Shrewsbury	37,350		

In terms of total retail trade the towns would be listed in an order which has certain similarities, but also one in which many important differences may be noted:-

Worcester	76,200	Taunton	33,700
Carlisle	38,510	Hereford	31,460
Shrewsbury	35,380	Salisbury	29,700
Lincoln	34,300		

The most important difference is that the larger county towns are now more important. This is probably due to their rather greater importance as shopping centres for a third order region. If two representative trades of convenience and shopping goods are taken for examination this point becomes clearer:-

Town	Grocery	Boots & Shoes
Worcester	1	3
Hereford	2	5
Taunton	3	7
Shrewsbury	4	6
Carlisle	5	1
Salisbury	6	2
Lincoln	7	4

In Grocery those towns which cater most intensely for their fourth order hinterland rank highest (Salisbury is an exception as it will be seen). In Boots & Shoes it is the larger towns which are most significant (Salisbury is again an exception). Despite these variations the overall pattern must not be ignored. Apart from Worcester there is only a range of 8,810 in the hinterland population served by the towns. It is however, worth-while to consider the variations that are found between trades in the towns' trading patterns, for these are very indicative of a number of major points.

Carlisle's trading pattern may be fairly easily explained. It supplies food to about a half of its fourth order hinterland population. It supplies a rather larger population with dairy goods for there are a number of important depots in the city. Butchers and greengrocers only cater for internal demand with any effectiveness. Its clothing shops meet about 60% of the demand of its third order hinterland (if this is taken as the Marketing Media hinterland) [5]. Boot and Shoe shops and Men's Wear Shops meet as much as 80% of this demand. There are fairly high sales in the Confectioners group for this is a typically urban type of trade, and is concentrated to some extent in all the County Towns. Only in the Booksellers trade is the city poorly represented. The reasons for this final feature are not clear, but they may be the result, to some extent at least, of the absence of major educational establishments in the city.

Lincoln's trading pattern is more involved. The most fundamental feature which emerges from the analysis is that

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5. Great Britain, A Marketing Media Survey, Geographia, 1961.

the city meets only a small proportion of the demand of the "Marketing Media" Hinterland. It serves a relatively large population with "other food" and dairy goods while only just meeting internal demand in groceries, clearly this is one case where cross-trading may be recognised. As in every town other than Carlisle, butchers serve a relatively larger population. The population served by the various non-food trades ranges from 22,100 in confectionery to 67,600 in boots and shoes, with all trades other than confectionery serving at least 40,000. This is a far more even pattern than that of Carlisle, perhaps indicative of Lincoln's more sharply defined fourth and third order hinterlands (in some respects Carlisle acts as a regional capital, a second order centre).

Worcester is a rather exceptional case. It serves a far larger population than might have been expected. Glaisyer [6] noted that 10,000 people registered for food in 1944 in the city, lived outside it. Estimates based on the Census show that by 1950 probably 15,000 more people depended on the city for foodstuffs. This is partly a result of the wider movement of shoppers after the end of the war, and partly a reflection of the growth of population in the immediate proximity of the city. Worcester supplies about 70,000 people outside its boundaries with shopping goods, although variations

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6. "<u>County Town : A Planning Survey of Worcester</u>", by J. Glaisyer, T. Brennan, W. Ritchie & P. Sargant Florence. 1946. P. 191

do exist from trade to trade, the pattern is rather more constant than in other towns.

Shrewsbury shows features which, by now, will be seen to be typical. In the food trades it barely supports its own population. Indeed in greengrocery it meets less than half the theoretical internal demand. The explanation of this is not easy to find, cross trading must account for some of the deficiency but not all. 60,000 would seem to be a fair estimate of the population served with shopping goods. Jewellers supply nearly twice this figure, something which is partly the result of increased purchases by an upper class population.

Hereford, Salisbury and Taunton show much the same features, except that Salisbury has rather lower sales of foodstuffs and considerably higher sales in the shopping goods trades than the other two towns. In all three towns however, it would seem that a reasonable estimate of the hinterland population supplied with food would be about 15,000, and that 60,000 is a fair estimate for shopping goods.

In summary these retailing statistics show features which are known intuitively, but which have been impossible to demonstrate objectively without them. Carlisle is a dominant County Town for its County. Worcester despite the proximity of Birmingham is a fairly dominant city. Lincoln is far less dominant than these two as the figures show quite clearly.

Shrewsbury is a far more dominant type of city, as is Hereford for a rather smaller area. Salisbury, dominates a hinterland area which is roughly coincident for both third and fourth order demands, and hence has somewhat higher sales figures than might be expected. This, to a lesser extent, is true of Taunton. In its case however, the competing claims of Bridgwater, Yeovil and Exeter result in the town supplying rather fewer people with specialist goods.

The Size of Shops.

It has been a major theme of this thesis that the County Towns are particularly distinguishable by the size of their shops. In chapter four especially this has been commented upon in its national perspective. A full idea of the pattern can only be achieved with reference to field observation. Table 8.E. sets out the basic census data on which this account is to be based.

Grocers shops vary in only one major respect. Hereford and Taunton have far larger shops of this type than any of the other towns. Field survey suggests that this is a result of the large numbers of small shops, found in non-central locations, in towns larger or the same size as Shrewsbury. No really satisfactory explanation can be found for the small size of Salisbury's shops. It does have 83, while Taunton has 78 and Hereford 77, but these few extra hardly account for such a large difference in the average

Table 8.E. Sales Per Establishment by Trade Type in County Towns. £'s.

	Carlisle	Lincoln	Worcester	Shrewsbury	Salisbury	Hereford	Taunton
Grocers	10,146	7,839	10,000	10,218	10,843	16,689	16,538
Fishmongers	10,215	5,273	10,636	15,000	11,091	14,800	10,556
Dairymen	52,000	37,937	32,929	27,667	13,833	5,773	15,600
Butchers	5,918	6,776	6,387	5,787	10,952	8,967	9,760
Greengrocers	3,308	3,579	4,529	3,667	4,824	3,632	6,639
Bakers	5,688	5,750	10,958	9,222	10,333	11,875	11,700
Confectioners	9,481	6,350	6,614	9,129	13,568	9,235	9,318
Clothing (Total)	18,244	12,458	14,729	17,954	15,760	16,579	20,421
Boots & Shoes	13,692	11,786	12,960	14,286	16,938	13,333	13,937
Men's Wear	18,964	18,214	17,419	16,000	16,039	17,000	11,462
Women's Wear	37,821	16,204	22,913	37,208	29,625	23,321	50,000
Men's & Women's Wear	23,000	13,100	23,500	19,357	7,556	22,364	26,667
Drapers	3,200	1,889	2,944	*	1,583	3,286	6,625
Hardware	7,405	9,056	10,969	17,393	11,231	7,000	10,818
Booksellers	5,400	9,060	9,666	6,231	10,654	15,500	9,913
Chemists	10,269	14,867	13,185	15,550	15,722	15,200	13,647
Furnishers	25,893	19,000	18,846	14,500	15,667	17,647	14,000
Jewellers	6,233	8,000	6,700	11,235	5,852	5,816	9,236
No. of Times with largest shops	3	0	0	3	4	3	5
No. of Times with smallest shops	4	6	0	1	2	3	2

size. Two characteristics explain the pattern to a certain extent. In all probability Salisbury has a number of larger grocers' shops than the other two towns. These "High Street" shops found in the Central area account for a relatively high proportion of all the grocery trade of the city. Salisbury also has a rather larger number of corner shops in the older parts of the city, a feature which is based particularly on the street plan. The thirteenth century grid plan of Salisbury acts, in this respect, in a very similar way to the later grid plans of the industrial towns. The other two towns do in contrast have a relatively large number of medium sized shops. (This is one problem which the 1962 census can be expected to throw considerable light, for there has been a considerable number of changes in Salisbury's Central area since the 1950 census. Woolworth Ltd. for instance established one of their earliest separate food halls in the city). Another partial explanation of this problem is that within Salisbury there is no marked "100%" location (because of the grid-plan), and so there is less pressure on grocers to find the highest density site.

Variations in the size of fishmongers are small. Shrewsbury and Hereford conform to the Midlands pattern of large shops (P. 159). Lincoln, only 45 miles from Grimsby, has the smallest fishmongers. The actual numbers in each town are particularly interesting in this case:-

Carlisle	14	Shrewsbury	8
Lincoln	22	Hereford	5
Worcester	14	Salisbury	11
		Taunton	7

Lincoln's large numbers emphasing its special location in relation to sources of supply.

In the Dairy trade there is a fairly well marked relationship between the size of depots and the size of towns, the largest depots being found in the largest towns. One exception is that Hereford has 22 dairymen, in comparison with Salisbury's 6 and Taunton's 10. Many of these are producer-retailers, as might be expected in such a region.

Butcher's shops vary in size in much the same way as they do in number. The size of the market for this trade is much the same in Salisbury, Hereford and Taunton but:-

	Total Sales (£'000)	Number	Size(£'s)
Salisbury	230	21	10,952
Hereford	269	30	8,967
Taunton	244	25	9,760

It would seem that butchers are found relatively closer to the most central sites in Salisbury than grocers. Butchers' shops in Lincoln are larger than those found in the other large county towns since rather more of them belong to chains.

The variations in the size of other food shops are not of great significance, most just reflecting the numbers of shops trading in a particular trade. Two are however of special note. In the bakery trade the two largest towns have relatively small shops. The reasons for this (i.e. their size as compared with Worcester) are not clear. They may be connected with regional consumption habits or with the frequency of delivery rounds in each town. Salisbury has exceptionally large confectioners, this is a direct result of the presence there of a number of branches of major multiple organisations.

There is markedly little variation between the County Towns in the size of their clothing shops. This, in contrast to those shops fulfilling purely convenience demands, is understandable for a great majority of these shops are concentrated in the major shopping centre of each town - areas which show relatively little variation. It is therefore of interest to note that the two towns which have the most developed secondary shopping centres : Lincoln (the Bail and lower High St.) and Worcester (St. John's) [7] have the smallest shops of this type, the average figure having been depressed by the necessity of supplying a spatially fragmented demand.

Different trades in the Clothing Group reflect this overall characteristic only partially. It may be noted to exist in the Boot and Shoe trade and the Women's Wear trade. In Men's Wear however, there would seem to be a general decrease in the average size of shop with a decrease in the size of town. Multiple traders in this trade are very

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7. see figure 28 P.207 (Glaisyer et al <u>op cit</u>).

dependent on the overall size of the market, for a suit is a very occasional purchase, and the impulse element in sales plays a relative small role. Two clothing trades which have a somewhat erratic pattern of shopsizes are the Women's Wear and the Men's and Women's Wear trades. These two are typically difficult to distinguish, both one from another and from Department Stores. The number of these shops found in the County Towns fluctuates quite considerably:-

	Carlisle	Lincoln	Worcester	Shrewsbury	Salisbury	Hereford	Taunton
Women's Wear	28	54	46	24	24	28	18
Men's & Women's Wear	16	20	14	14	9	11	9
Total	44	74	60	38	33	39	27

Wherever particularly large shops of these types are found this size may be explained by relatively few shops of this type being found in a town. The large numbers of shops in the two trades, a reflection of internal distribution, in Lincoln and Worcester should be noted.

Variations in the size of hardware, book and jewellery shops follow no apparent pattern. In all the County Towns, other than Carlisle, chemists have an average turnover of between £13,000 and £16,000. In Carlisle since neither of the major chains has a large shop chemists are on average much smaller (£10,269). Significant variations are found in the furniture trade. These generally reflect the organisational structure of a town's shops and correspond to some extent with the size of the town.

In general however, the lack of variation, in comparison with the food trades in these shopping goods trades is highly significant. This is mainly the result of a great concentration of the market for these goods in the central areas of these towns. The existence of significant secondary shopping centres is unusual. A fairly organic growth has meant that there have not been such fundamental shifts in the location of the major shopping centre, characteristic of many of the industrial towns. Shops are therefore able to exploit to the full any economies of size that are available in their trade. Major secondary shopping centres are only found in those towns where relief or evolution has resulted in the isolation of one area of a town from another. During field surveys two such areas were encountered. In Worcester there is the St. John's area, while in Lincoln there is the Bail.. In many towns, notably Carlisle (Botchergate) and Lincoln (Lower High St.), there are specialist shopping centres, usually for lower class custom, verging on the main centre, but these are excluded from this description for they are in essence part of the Central Area, and in any case there is as yet no uniform way of delimiting their extent.[8]

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8. Paul J. Mika, of Clark University, in a personal communication, Dec. 6 1959, has made the point that a comparative study of Southampton, Norwich and Derby revealed that Murphy and Vance's method of delimiting Central Business Districts is not easily adapted to British conditions.

Unfortunately it is not possible to be certain as to the effect of the Bail on the average size of shops in Lincoln. It is however, worth considering the general pattern of trade in this centre for it illustrates one of the major problems which is of concern in a geographical study of retailing. In this area, which is a part of a wider distinction within Lincoln between "the town below the hill" (i.e. the Lincoln Edge) and "the town above the hill", there are fourty-five shops. Ten of these are antique shops for this is the oldest part of the city under the shadow of the Cathedral and the area most visited by tourists. Fourteen of the remaining thirty-five shops (i.e. 40%) are branch shops of organisations with other branches in the city. This is a frequency twice the regional average. It is clear that, since the retail market in Lincoln is fragmented to a considerable extent by "the hill", organisations have to forgo the economies possible in one large shop in order to capture a sufficient share of the total market. It does therefore seem reasonable to suggest that the divisions within Lincoln(the lower High St. is another important shopping centre) largely account for the overall small size of shop.

MULTIPLE RETAILERS.

The distribution of multiple retailers is the result of two major factors, which in chapter five have been termed, hierarchical and network. In the case of the County Towns the most important of these is the former, for these towns are easily distinguished as important shopping centres, and hence attract national and near-national organisations to their central shopping areas. Set against this hierarchical factor must however be put a factor which has as yet been given little place in this study, namely the social class of the inhabitants influenced by a "County Set". Multiple retailers are generally at a disadvantage in catering for such a fragmented demand so independent retailers possess in these towns, above all others, a market for their particular type of service. The third factor determining the number of multiple retailers is the network factor, and it is by no means clear how these three factors interact. It is however, an observable fact that both regional and local multiples are generally poorly developed in these towns, as the towns are generally located at some distance from a major conurbation.

Table 8.A lists some of the major companies which have at least two branches in the seven towns, and which have been distinguished in chapter five. Very few organisations achieve a representation in all the towns. Those that do are all companies which may only be classified as national organisations,

what is surprising is that there are so few of them. Indeed even if organisations which have branches in at least five of

Table 8.A County Towns : Multiple Organisations

(a) With a branch in all seven towns:-

Home and Colonial Ltd.	Curry's
Maypole Dairy Co. Ltd.	Halford
Montague Burton Ltd.	MacFisheries Ltd.
Hepworth Ltd.	Scotch Wool Co. Ltd.
Singer Sewing Machine Co. Ltd.	Marks and Spencer Ltd.
W. H. Smith & Sons Ltd.	F. W. Woolworth Ltd.
H. Samuel Ltd.	Boots Cash Chemists Ltd.
	Timothy Whites & Taylors Ltd.

(b) With a branch in five or six of the towns:-

Lipton Ltd.	Dewhurst Ltd.
Melias Ltd.	Baxters Ltd.
Dorothy Perkins Ltd.	
Richards Shops Ltd.	

the towns are considered the total only becomes nineteen. In general it may be concluded that there are few multiples which are strictly national in distribution, that the County Towns even though they are important third order shopping centres are not fully covered even by all those organisations which claim "branches everywhere". Chapter five has already seen how the first of these conclusions applies to the national pattern. The second conclusion must undoubtedly be to some extent a reflection of the relatively fewer advantages which these sort of shopping centres offer to multiples. It is not enough simply to put this in complete coverage down to disequilibrium. If the County Towns were such favourable situations for multiple organisations, as their rank would seem to suggest, far more organisations would have this full coverage,

In the grocery trade it has been possible to distinguish in chapter five a number of organisations with more than 50 branches. Only 19 of these appear to have a branch in the County Towns. These organisations are to a relatively greater extent than other multiples concentrated on the major conurbations. The town with most branches of these organisations is Worcester, for it is to some extent the most easily colonised town of the seven, being located so near to a major conurbation and also its social structure is one of the most favourable to multiple techniques in this trade. This second feature is perhaps the most important for there is no noticeable concentration of the regional type of grocery multiple in the city. The other County Towns show very few differences in their organisational pattern, except that Shrewsbury shows the effects of its relative isolation in a region where these organisations are poorly developed by only having five branches. In contrast to Shrewsbury, Carlisle has a rather more normal number of these multiples for it has been possible for some of the many organisations based to the east of the Pennines to take advantage of the reasonable communications to this city.

In the Men's Wear Trade large or large medium organisations were examined in chapter five. A fairly high proportion of these organisations have branches in the County Towns (Table 8.B)

This feature is almost entirely the result of hierarchical factors outplaying social factors, since the former are supremely important for these organisations. The town with the largest number of such organisations is Lincoln for it lies closest to Leeds, the great centre of this trade.

In the Furnishing Trade a rather fuller analysis of organisations is possible. Table 8.C. sets out some of the features of the organisational structure of each town's trade.

Table 8. C. County Towns : Furnishing Trade.

	Multiples	Independent Chains	Unit Shops	Total	Census
Carlisle	9	4	11	24	28
Worcester	10	1	11	21	39
Lincoln	7	2	8	17	38
Shrewsbury	9	1	10	20	28
Salisbury	6	2	12	20	24
Taunton	4	4	9	17	20
Hereford	2	0	7	9	17

A comparison with the number of furnishers recorded in 1950 by the Census shows that this is a fairly full coverage for it does not in the main include, Antique Dealers, Secondhand Furniture Dealers, Picture Dealers and Musical Instrument shops, all of which are included in the Census group. The features of importance shown by the table, are that, apart from the facts that Taunton and Hereford have far fewer multiple organisations than Salisbury, most of the County Towns have a very similar number of multiple organisations in this trade. Differences may be noted however, in the proportion of these establishments owned by Great Universal Stores:-

Carlisle	Worcester	Lincoln	Shrewsbury	Salisbury	Taunton	Hereford
3	3	5	2	2	2	1

The lower proportions of Carlisle, Worcester and Shrewsbury are the result of the presence in these towns of organisations belonging to one or other of the two major networks of organisations; in the case of Carlisle the northern networks, large medium organisations like Ridings Stores, Hardy and Co., Clydesdale and New Day Furnishing, in the case of the other two cities the midland networks of smaller multiples (see figure 5.I.).

The independent chains are of considerable interest for they suggest another way of tackling the problem of the wider business district of the County Towns. Carlisle has four, and is connected in one way with the second order hinterland of Newcastle:-

N.H. Chapman Ltd.
Carlisle and Newcastle

Simmons Furnishers Ltd.
Carlisle, Gateshead, Newcastle, Sunderland, Workington, Kendal and Barrow.

and in another way with its own third order hinterland:-

W. Vasey Ltd.
Penrith, Whitehaven and Carlisle

C.W. Davis Ltd.
Carlisle and Wigton.

Worcester would only appear to have one such organisation:-

Barclays
Birmingham (3), West Bromwich, Cannock and Worcester.

stressing its links with other towns in the West Midland conurbation area.

Lincoln's two organisations suggest a third order hinterland area:-

Neale Bros. Ltd.	J.H. Todd Ltd.
Lincoln, Bourne, Gainsborough, Grantham, Louth and Spelding.	Lincoln, Grimsby, Scunthorpe and Boston.

Taunton's four organisations are more varied. Two suggest the third order hinterland:-

Economy House Ltd.	R. King Ltd.
Taunton and Bridgwater	Taunton and Wellington.

while two others show far wider linkages:-

Hants Furniture Co. Ltd.	D. Arditti Ltd.
Taunton, Portsmouth, Gloucester, Southampton, Exeter, Reading and Chatham.	Taunton and Bournemouth

The regional connections hinted at in this account of furnishers are most important to any study of retailing, they are the business districts of these towns. It has been possible to note many interesting implications of theories of "a nested hierarchy of functional regions" in this study of retailing. For instance Carlisle is clearly in a very different business district of second order ranking than the other towns, its links with Newcastle and Glasgow are very close despite its isolation. In many cases it must have appeared as an important next town in which to establish a branch.

Salisbury is another town which lies in a separate second order region, having been relatively easily colonised by London based organisations. It does, as table 8. B. shows, have relatively large numbers of multiple establishments, something which contradicted a number of working hypotheses based on the social character of the town. Salisbury is sufficiently near to the metropolis for this to have been submerged beneath the expansion of London multiples, something which is far more noticeable of course in towns of the Home Counties.

The other County Towns are in the main not so easily placed in second order regions. Taunton lies rather too far west to be dominated by London based organisations. Bristol however is not an important enough centre of multiple organisation to place Taunton firmly in an second order region based on it. Lincoln clearly lies under the influence of Nottingham, Derby, Leicester and Sheffield. None of these cities exerts a dominating influence in this aspect of its functional region. Much the same can be said of Shrewsbury and Hereford, which are neither dominated by Birmingham in the way that Worcester is, and which in consequence nearly form a second order region of their own.

At a more local scale "business districts" are more easily recognisable. Figure 8.A. shows the distribution of independent chains and small multiples which have a branch in the various County Towns. The most remarkable feature of this distribution is the extremely close relationship with Carruthers' third order regions (shown with a continuous line). Clearly for the small chain these are significant communities of interest. It is in addition worth noting that each map is the same size, so distance can be seen to be a very significant element in each case. The number of branches of organisations of this type which have been discovered varies from town to town, but there are few differences in their relative distribution. Worcester is a major exception confirming its close connections with the West Midland Conurbation. Certain small multiples found in Taunton, Lincoln and Shrewsbury shown in figure 8 conform to the third order hinterland even more closely.

One feature which should be mentioned here is that in many towns there are institutional factors which prevent the expansion of multiple organisations. Thus in one of the largest of the County Towns no multiple, or indeed independent chain, is allowed to establish shops on Council estates, although in most cases Co-operative Societies have sites reserved for them. This as it will be seen means that the latter have had far better opportunities of establishing self-service shops in County Towns than multiple retailers.

Furnishers are not shown on figure 8. A. as they have been listed in full above.

Table 8.B. Some Multiple Organisations Found in the County Towns

1 Carlisle
2 Lincoln
3 Worcester
4 Shrewsbury
5 Salisbury
6 Hereford
7 Taunton

GROCERS	1	2	3	4	5	6	7	Total No. Branches
Home & Colonial	x	x	x	x	x	x	x	649
Pearks			x		x		x	500
Lipton	x	x		x	x	x	x	468
Maypole	x	x	x	x	x	x	x	703
Burton			x			x		200
Fearis			x			x		
L & N	x							111
Cooper	x							187
Mason			x	x		x		502
International			x		x		x	547
Kilby					x			31
Melias	x	x	x	x	x	x		586
Walter Willson	x							193
Gallons		x						241
World's Stores			x				x	212
Thompsons	x							123
David Greig		x	x		x	x		230
United Counties			x					100 +
Farrands		x						57
Total	8	7	11	5	8	8	6	
MEN'S WEAR								
Burton	x	x	x	x	x	x	x	500
Collier	x	x			x		x	348
Hepworth	x	x	x	x	x	x	x	275
Dunn		x	x					181
Town Tailors		x	x				x	146
Foster Bros.		x	x		x			165
Hodges					x	x	x	45
Bradley				x		x		168
Alexandre	x	x	x					120
Meakers		x						80
Jackson	x							75
Total	5	8	6	3	5	4	5	
WOMEN'S WEAR								
Scotch Wool	x	x	x	x	x	x	x	360
Dorothy Perkins		x	x	x	x	x	x	169
Richards	x	x			x	x	x	81

	1	2	3	4	5	6	7	Total No. Branches
Wilson	x	x		x				45
Dupont			x		x			64
Barnett Hutton	x	x						85+
Direct Raincoat	x							90
Total	5	5	3	3	4	3	3	
OTHERS								
Singer	x	x	x	x	x	x	x	442
W.H. Smith	x	x	x	x	x	x	x	369
Currys	x	x	x	x	x	x	x	285
Halford	x	x	x	x	x	x	x	170 +
Timothy Whites								600 +
Boots								1,300 +
Wyman			x			x	x	79
Lawleys			x	x		x	x	50
Bewlay			x		x		x	150 +
Preedy		x	x	x				56
Dewhurst			x	x	x	x	x	270 +
Baxters		x	x	x	x		x	400
Eastmans			x		x	x	x	50 +
Tates	x	x						19
Max Stone			x		x	x	x	200 +
Salisbury's Handbags			x	x			x	106
British Home Stores					x		x	74
Littlewoods			x					62

CO-OPERATIVE SOCIETIES

Each County Town has a Co-operative Society based on it. These societies do however vary greatly in significance, variations which are in the main due to the region in which the town is found. Thus Salisbury and Hereford have the lowest turnover figure since co-operative trading is most poorly developed in the most rural areas of Southern England. Lincoln in contrast has the highest turnover since most societies in the North Midlands are large.

Table 8. D. County Towns : Co-operative Societies 1960

	No. of Employees	Sales (£'000)	Sales per Employee (£)
Lincoln	1309	6,033	4,609
West Somerset (Taunton)	1080	4,425	4,097
Worcester	844	3,360	3,983
Carlisle	437	1,726	3,949
Shrewsbury	270	1,041	3,854
Salisbury	207	832	4,013
Hereford	144	638	4,432

The Lincoln, West Somerset and Worcester Societies are all far larger than the remaining societies. The first and third of these clearly reflect the Midland England pattern of large societies. West Somerset is rather a different case (see P.262 and figures 6.A. and B.) Its expansion has mainly been achieved by amalgamations, it may well have attracted larger shopping populations to Taunton (the 1962 Census should clarify this).

Table 8. D. sets out the sales per employee figure for each society, and although these will be considerably affected

by the management of each society there are some distinct tendencies which may be noted. The Lincoln society has well developed central premises, (having spent £500,000 on re-development) serves the whole of its third order region (see figure 8. B.), and has in consequence a high rate of sales per employee. Hereford is another society which has the same pattern. In both these cases the high figure achieved is to a large extent a reflection of higher sales of "shopping goods" (see P.125). 12.4% of Lincoln's sales are in dry goods, as against 11.3% of Worcester's.

Carlisle is an interesting case, for it would seem that 20% of its sales are dry goods despite its low sales "productivity" per employee. The high proportion may be explained by the fact that Carlisle is above all a "dry-goods type of centre", its third order functions are relatively more important than its fourth order ones, and that the society has relatively few shops in its hinterland selling convenience goods. Sales "productivity" in the society may be low as a result of a larger number of small shops (Table 8. E.)

Table 8. E. Dispersion of the Size of Co-operative Grocers

(£'000)	Carlisle	Lincoln	Worcester
under 8	1	1	0
8-12	1	3	1
12-16	3	3	0
16-20	2	5	1
20-30	10	13	7
30-40	7	14	3
40-60	4	17	10
over 60	1	11	5

The trading pattern of the Co-operative Societies shows quite a marked relationship to the third order hinterland of the County Towns, except in the case of the exceptional West Somerset Society. These business districts are particularly clearly cut in the case of the towns of the Welsh Marches. Figure 8. B. shows the branches of the societies based in these towns on the same section for no branch is located outside the third order hinterland. This area is of course a classic area for the study of the functional relationships of towns, and here is a further indication of the value of geographical studies of retailing to the discipline as a whole.

SELF-SERVICE

Self-service techniques have as yet attracted relatively little support in County Towns. Table 8. F. shows the numbers of shops operating in this way in the seven towns. It shows that, surprisingly enough, Salisbury has the fewest number of shops operating in this way, and that apart from Carlisle, which has eight, all the others have 13 or 14 shops. The ownership pattern is remarkably similar, with only Shrewsbury being clearly exceptional, as it alone has more capitalist than co-operative self-service shops.

Table 8.F. County Towns : Number of Self-Service Shops in 1958 and 1961

	Carlisle	Lincoln	Worcester	Shrewsbury	Hereford	Salisbury	Taunton
(a) 1958							
Total No.	5	12	8	9	10	3	11
No. of Capitalist	1	1	1	7	2	1	1
No. of Co-operative	4	11	7	2	8	2	10
No. of Organisations	2	2	2	2	3	2	2
(b) 1961							
Total No.	8	14	13	13	13	4	13
No. of Capitalist	3	3	6	9	4	2	3
No. of Co-operative	5	11	7	4	9	2	10
No. of Organisations	4	4	5	4	5	3	4

Chapter seven has shown that the experience of organisations in operating these techniques has been very influential in determining the rate at which the techniques have been adopted. Most of the County Towns are located too far away from the major conurbations to be easily colonised by multiple organisations experienced in using the new techniques in them. In almost every case there are few multiple organisations operating self-service shops in the towns. Shrewsbury is not an exception for six of its nine capitalist shops are operated by Morris and Co. Ltd.

This organisational feature may be seen even more clearly if the 1958 pattern is examined. At that date only one capitalist organisation, different in each case, was operating self-service shops in each town other than Hereford. The early development, and indeed the present numbers, of self-service shops was almost wholely the result of co-operative activity. Other types of organisation clearly have found it too difficult or thought it to be not sufficiently worth-while to set up self-service stores in these towns. What factors other than the distance factor lead to this result is uncertain, probably the question of social class is the most important for upper class shoppers are known not to favour the technique as much as lower class customers.

In the case of Carlisle the rather low number of self-service shops is the result of few co-operative shops of this type. The manager of the Carlisle Society considers [9] that

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9. Around the Boardrooms : Carlisle, Agenda Vol. 8 No.1 June 1960 P. 70

people in Cumberland have not taken very readily to the new technique, so the factor of social inertia must be considered. In fact the average size of the Carlisle society's stores is far smaller than any of the other co-operative societies:-

Carlisle	Lincoln	Worcester	Shrewsbury	Salisbury
583 sq.ft.	1160 sq.ft.	1031 sq.ft.	1433 sq.ft.	963 sq.ft.
Hereford	Taunton			
631 sq.ft.	No data			

Despite this factor of social inertia the Carlisle society has in fact five self-service shops so there are other reasons why there is such a poor capitalist development of this type of trading. Undoubtedly the most important of these is the distance from the densely populated Northumberland and Durham coalfield with its large number of organisations operating self-service shops.

Salisbury's small number of self-service shops is a result, partly of a poorly developed co-operative society, and partly of its social structure. Since it is far nearer to London than the other County Towns, it might have been expected to have more rather than fewer self-service shops, being more easily colonised by organisations based there. It was in fact chosen by Woolworth Ltd. as an experiental location for a speciality food hall (this has 3,600 square feet of sales area and five check-outs), their only one until 1961. Salisbury however, perhaps more than any of the other County Towns, still retains an air of gentility. It is therefore not surprising that what is to some a harsh, brash new technique should not have prospered.

Hereford and Taunton would seem to have rather large numbers of self-service shops for their size. This is almost entirely due to the activities of the two co-operative societies based on the two cities : C.R.S. (Hereford) Ltd. and West Somerset, two societies which have been specially active in all forms of development.

Very few supermarkets are as yet found in the County Towns. Self-Service and Supermarket's definitions enable the following to be so classified:-

	1958	1959	1960	1961
Carlisle		1	1	
Lincoln				1
Worcester	2	2	2	2
Hereford				1
Salisbury	1	1	2	1

The list shows the effects of changes in these definitions. The Carlisle Co-operative Society's central premises were classified as a supermarket in 1959 and 1960 but as it only has two check-outs it was excluded in 1961. Arrows (Salisbury) Ltd., a member of V.G., has a shop in a new housing area of the city which also has two check-outs. Two of the supermarkets in the County Towns are found on new housing estates, and are co-operative run. One of Worcester's supermarkets is located in the St. John's shopping centre, for in towns which are as significant a shopping place as it land costs are high and parking problems are accute in the Central Area. Woolworth's food hall at Salisbury and Maypole's supermarket at Hereford are therefore very much special cases.

This study of the County Towns has attempted to show some of the ways in which the general pattern of retailing, established in earlier sections of the thesis, may aid the analysis of individual examples. It has in many cases been concerned with noting differences between the towns. It should however, not be forgotten that these towns do form a fairly distinct group. This feature is best summed up in Table 8.G. which shows the numbers and sales of large shops in these towns.

Table 8.G. Large Shops (see Table 4.G).

	No.	Total Sales £.
Carlisle	7	2,452,000
Lincoln	8	2,693,000
Worcester	7	1,341,000
Shrewsbury	7	1,777,000
Hereford	5	1,292,000
Taunton	7	1,643,000
Salisbury	no return	

Thus although the stores of the two largest towns have rather higher total sales, there is a distinct similarity in the number of large stores in each town. In many ways these towns are particularly associated with department store trading. Such an association is very difficult to document, but here is some evidence at least of its validity.

The study of the geographical pattern of retailing has shown that the County Towns are of some significance on a national scale, but that the districts which might be said to be their business districts are relatively restricted in extent. This study has, it is considered, suggested some ways in which the far more significant business districts of the major conurbations might be examined.

GENERAL CONCLUSION

> "Only lip service has as yet been paid to proper studies of the hierarchical pattern of settlements, and it is a subject well worth more attention at the universities and schools that teach planning" *

This thesis has examined retailing, one of the most important functional elements of towns. Most studies of towns have considered retailing to be a function which reflects only very incompletely the full hierarchical pattern of towns. It is however, the claim of this work that real differences may be observed.

The most difficult problem which has been faced has been a shortage of data, since many organisations are still unwilling even to give an address list of their branches. Much of the analysis has been based on incomplete data. Techniques for a geographical study of the trades are now available, and as more data becomes available, either in the 1962 Census or from more organisations, a fuller idea of the pattern may emerge.

Furthermore these methods of examination are applicable to areas outside Great Britain, and it may well be, that as geographers become more and more concerned with showing the functional relationships between places, that the approach through retailing may become more and more useful to the discipline as a whole.

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* Journal of Town Planning Institute Vol. xlviii No.6 June 1962 P.149

APPENDIX A.

This appendix lists a number of regional groupings which are used in this thesis.

1. Standard Regions of the Registrar General.

Northern: Cumberland, Durham, Northumberland, Westmorland, and the North Riding of Yorkshire.
East and West Ridings (Yorkshire): The East and West Ridings, and the City of York.
North Midland: Derbyshire (except the High Peak District), Leicestershire, Lincolnshire, Northamptonshire, Nottinghamshire, and Rutland.
Eastern: Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Huntingdonshire, Norfolk and Suffolk (except certain parts of Essex and Hertfordshire within Greater London.
Greater London:
South East: the areas of Kent and Surrey not in Greater London, and Sussex.
Southern:* Berkshire, Buckinghamshire, Dorset, Hampshire and Oxfordshire.
South Western:* Cornwall, Devonshire, Gloucestershire, Somerset and Wiltshire.
Midland: Herefordshire, Shropshire, Staffordshire, Warwickshire and Worcestershire.
North Western: Cheshire, Lancashire and High Peak District of Derbyshire.
Wales: The whole of Wales and Monmouth.
Scotland:

2. Co-operative Union Sections.

Scotland: Scotland S.R.
Midland: Midland S.R. (except Hereford and N. Staffs), North Midland S.R. (except N. Lincs., N. Notts., N. Derbyshire), and Cardigan, Montgomery, Radnor and Huntingdon.
Northern: Northern S.R.
North West: North West S.R. with Caernarvon, Flint, Merioneth, Denbigh and N. Staffs.
North East: Yorkshire S.R. with part of Derby, Lincoln and Notts.
Southern: Eastern S.R. (except Huntingdon), London S.R., South Eastern S.R., and Southern S.R. (except Dorset).

* In 1961 the South only includes Poole M.B., the rest of Dorset becoming part of the south west. The precise areas included in these regions are listed in many publications of H.M.S.O.

South West: South West S.R. (except Gloucester) and Dorset.
Western: Brecknock, Carmarthen, Glamorgan, Gloucester, Hereford, Monmouth and Pembroke.

Regional subdivision used in Table 6L for 1911 and 1939 figures.

North: the three northern S.R.s.
Midlands: as above with Monmouth and Norfolk.
South: as above but without Norfolk, but with Gloucester and Dorset.
South West: Cornwall, Devon and Somerset.
North Wales: Caernarvon, Denbigh, Flint, Merioneth, Montgomery and Anglesey.
South Wales: Cardigan, Radnor, Brecon, Carmarthen, Pembroke, and Glamorgan.
Scotland: as above.

3. "Rural Counties".

A grouping used in various tables in this thesis.

Lincolnshire, Soke of Peterborough, Huntingdon, Rutland, Cumberland, Westmorland, the South (except Sussex), the West and the East (except Essex and Herts), Worcester, Hereford and Shropshire.

4. Classification of Towns by Moser and Scott.*

Mainly resorts, administrative and commercial towns

Group 1 (mainly seaside resorts):
Worthing; Hove; Hastings; Eastbourne; Bournemouth, Torquay; Southport; Harrogate; Brighton; Blackpool.
Group 2 (mainly spas, professional and administrative centres):
Bath; Cheltenham; Poole; Oxford; Cambridge; Exeter; Maidstone; Bedford; Colchester; Southend-on-Sea.
Group 3 (mainly commercial centres with some industry):
Southampton; Portsmouth; Plymouth; Bristol; Gloucester; Great Yarmouth; Norwich; Ipswich; Lincoln; Peterborough; Reading; Northampton; Lancaster; Worcester; York; Cardiff.

Mainly industrial towns

Group 4 (including most of the traditional railway centres):
Crewe; Darlington; Swindon; Doncaster; Derby; Carlisle; Chesterfield; Barrow in Furness; Mansfield; Coventry; Sheffield; Wakefield; Stockport; Newcastle under Lyme.

* Moser and Scott 1961.

Group 5 (including many of the large ports as well as two Black Country towns):
Birkenhead; Liverpool; Grimsby; Hull; Tynemouth; Newport; Swansea; Newcastle upon Tyne; Wolverhampton; Birmingham.

Group 6 (mainly textile centres in Yorkshire and Lancashire):
Huddersfield; Halifax; Leeds; Dewsbury; Bradford; Keighley; Bolton; Burnley; Blackburn; Bury; Manchester; Oldham; Preston; Rochdale; Leicester; Nottingham.

Group 7 (including the industrial towns of the north-east seaboard and mining towns of Wales):
Gateshead; South Shields; Sunderland; West Hartlepool; Barnsley; West Ham; West Bromwich; Salford; Warrington; Merthyr Tydfil; Rhondda.

Group 8 (including the more recent metal manufacturing towns):
Stockton-on-Tees; Scunthorpe; Middlesbrough; Thurrock; Nuneaton; Rotherham; Bootle; Dudley; Walsall; Stoke-on-Trent; St. Helens; Wigan; Smethwick; Oldbury.

<u>Suburbs and suburban type towns</u>

Group 9 (mainly 'exclusive' residential suburbs):
Coulsdon & Purley; Epsom & Ewell; Esher; Bromley; Sutton & Cheam; Wanstead & Woodford; Beckenham; Finchley; Southgate.

Group 10 (mainly older mixed residential suburbs):
Wood Green; Hornsey; Ealing; Hendon; Wimbledon; Ilford; Heston & Isleworth; Twickenham; Croydon; Surbiton; Crosby; Wallasey.

Group 11 (mainly newer mixed residential suburbs):
Chigwell; Orpington; Solihull; Hornchurch; Chislehurst & Sidcup; Ruislip-Northwood; Bexley; Harrow; Carshalton; Wembley; Merton & Morden.

Group 12 (including light industry suburbs, national defence centres and towns within the sphere of influence of large conurbations):
Gosport; Gillingham; Romford; Luton; Uxbridge; Watford; Slough; Enfield; Mitcham.

Group 13 (mainly older working-class and industrial suburbs):
Willesden; Tottenham; East Ham; Leyton; Brentford & Chiswick; Southall; Edmonton; Walthamstow; Acton; Stretford (Lancs.).

Group 14 (mainly newer industrial suburbs):
Hayes & Harlington; Barking; Dagenham.

APPENDIX B.

CENSUS DEFINITIONS.

Definitions applying to information provided by the Census of Distribution 1950 (full wording is to be found in Appendix C of the Census, pp.145-151 of Volume One).

A. Retail Trade Classification.

Grocery Group

Grocers, not included in "combined" headings below.
Grocers with off-licence
Grocers with meat
Grocers with bakery goods
Grocers with hardware

Other Food Retailers

Dairymen, includes distributing depots from which roundsmen operate.
Butchers
Fishmongers, Poulterers
Greengrocers, Fruiterers
Greengrocers, Fruiterers with Fish
Bread and Flour Confectioners, includes depots from which roundsmen operate.
Cooked Meat and Delicatessen
Off-Licences, those attached to public-houses not included.
Other Food, e.g. ice-cream, health food shops.
General shops, food and non-food goods. Usually sales under £10,000. Sometimes referred to as "village shops", and are generally situated in country districts or in secondary shopping areas of towns.

Confectioners, tobacconists, newsagents

Chocolate, Sugar Confectioners
Chocolate, Sugar Confectioner - Tobacconists
Chocolate, Sugar Confectioner - Tobacconist - Newsagent
Tobacconists
Tobacconist - Newsagent
Newsagent

Clothing Group

Boots and Shoes
Boots and Shoes with Repairs
Men's Wear
Women's outwear
Women's underwear
Women's outfitters
Milliners
Furriers
Corsetieres

Infants', Children's Wear
Men's and Women's wear
Wool, Art Needlework
Drapers
Secondhand Clothes Dealers

Hardware Group

Domestic Hardware, Ironmongery, includes "ironmongers and builders merchants", as long as they have at least 50% of their sales at retail prices.
China, Glassware
Radio, Electrical Goods, not repairers; includes hire establishments
Radio, Electrical Goods with Repairs
Electrical Goods with contracting, only retail part of business.
Electricity Showrooms
Gas Showrooms

Booksellers, Stationers, stationers believed to be supplying mainly trade and business users have been classified as wholesalers; these often describe themselves as "commercial stationers". Dealers in typewriters etc. only included if annual turnover is under £10,000.

Chemists' goods, photographic goods group

Dispensing Chemists, usually sell toilet goods and cosmetics.
Other Retailers of Chemists' Goods, not dispensing chemists.
Photographic Goods

Furniture Group

Domestic Furniture, dealers in office furniture classified as wholesalers.
Antique Dealers
Secondhand Furniture Dealers, distinction with above made according to trader's own description.
Pictures
Musical Instruments

Jewellery, leather and sports goods group

Jewellery, watches and clocks.
Leather Goods
Sports Goods, Toys, Fancy Goods: division largely according to trader's distinction

General Group

Department Stores, total sales over £100,000 and greater than £5,000 in each of several commodity groups, one of which is clothing.

Variety Stores, "Variety" or "Bazaar" Stores, goods are usually displayed in trays or racks.

Other General, other establishment selling a wide range of non-food goods. Sales generally over £20,000.

Coal, builders' materials, corn group*

Coal
Builders' Materials
Builders' Materials with contracting
Corn Merchants

* Not included as a separate group in this study for, as the census definitions show, these trades are not easily separated into retail and wholesale sections.

Other Non-Food Retailers
Florists
Nurserymen, Garden Seedsmen
Pets, Pet Food
Pawnbrokers
General Secondhand Dealers
Sub-Post Offices with Minor Retail Sales
Other Non-Food, e.g. stamp dealers.

B. Service Trade Classification:-

Catering Group
Hairdressers
Funeral Furnishers
Repairers Group
Motor Trade

C. Other Definitions:- (see pp. III - VI).

1. Establishment: a separate place of business; in the retail trade includes independent shops, branches of multiple societies and retail co-operative societies, and also coal and other yards, market stalls, mail order houses, kiosks in cinemas, distributing depots, travelling vans, credit drapers working a round, hawkers, pedlars and other itinerant traders. Adjacent trading premises belonging to one trade with free internal communication for customers are treated as one establishment.

2. Organisation: an undertaking operating one or more establishments. A subsidiary company, as defined in the Companies Act, 1948, is regarded as a separate undertaking except in cases where there is close integration (e.g. combined purchasing establishments in the same kind of business, etc.), between two or more companies.

APPENDIX C.

THE URBAN HIERARCHY AFTER F.H.W. GREEN* AND W.I. CARRUTHERS.*

The Second Order:-

Full ranking centres

Birmingham
Bristol
Manchester
Newcastle
Nottingham
Leeds
Liverpool
Aberdeen
Dundee
Edinburgh
Glasgow

"Pseudo second order"

Cardiff
Norwich
Plymouth

"Places which may become second order centres"

Sheffield
Leicester
Derby
Stoke

"3A" Centres

Bradford
Brighton
Cambridge
Carlisle
Chester
Coventry
Exeter
Gloucester
Hereford
Hull
Ipswich
Lincoln
Middlesbrough
Northampton
Oxford
Preston
Reading
Salisbury
Shrewsbury
Southampton
Swansea
Sunderland
York

"3B" Centres

Aberystwyth
Bangor
Bedford
Boston
Caernarvon
Canterbury
Carmarthen
Cheltenham
Colchester
Darlington
Doncaster
Guildford
Hastings
Lancaster
Maidstone
Newport
Peterborough
Scarborough
Swindon
Taunton
Tunbridge Wells
Wolverhampton
Worcester
Wrexham
Yeovil

"3C" Centres

Aldershot
Aylesbury
Banbury
Barnstaple
Barrow
Bath
Bishop Auckland
Blackpool
Bournemouth
Bridlington
Brigend
Burton
Bury St. Edmunds
Chatham
Chesterfield
Chichester
Colwyn Bay
Crewe

Dorchester
Durham
Eastbourne
Folkestone
Grantham
Grimsby
Harrogate
Hertford
Kendal
Kettering
Kidderminster
King's Lynn
Llanelly
Lowestoft
Luton
Macclesfield
Mansfield
Merthyr Tydfil
Newbury
Newport (10w)
Northwich
Oswestry
Pontypridd
Portsmouth
Ramsgate
Rhyl
Rugby
St. Albans
Scunthorpe
Slough
Southend
Southport
Stafford
Torquay
Walsall
Warwick
West Hartlepool
Weston
Weymouth
Whitehaven
Winchester
Workington
Yarmouth

"3" General

Barnsley
Blackburn
Bolton
Burnley
Bury
Dewsbury
Halifax
Huddersfield
Keighley
Oldham
Rochdale
Rotherham
St. Helens
Stockport
Wakefield
Warrington
Wigan

* F.H.W. Green especially (1958) op. cit.

* W.I. Carruthers especially (1957) op. cit.

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