THE IMPACT OF OUT-OF-CENTRE FOOD SUPERSTORES ON LOCAL RETAIL EMPLOYMENT

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Foreword

Out-of-Town Supermarkets and Local Retail Employment

The consequences for local employment of retail development has been a matter of continuing debate and concern, notably in the context of sustaining and renewing urban economies. This paper is published as a contribution to that discussion. First reviewing the literature of the last fifteen years concerned with the employment effects of major shopping proposals, it reports the findings of a study of those effects based on a sample of out of town supermarkets which opened between October 1991 and February 1994.

The Forum believes that the study, its data and its findings will be of interest to all those concerned with retail and planning, including local government members and officers, central government, retailers, investors and developers.

The Forum commends the report as a contribution to the debate and understanding, and thanks the Boots Company and its researchers, Sam Porter and Paul Raistrick for offering the study for inclusion in this series of the Forum Occasional Papers. It also thanks the Research Group for the attention paid to data and methodological aspects of study.

Paul McQuail

Foreword

Occasional Paper Series

The National Retail Planning Forum's Research Group commissions studies on issues of joint interest to both retailers and planners. The studies are not only intended to further research, but also to generate debate between the Forum's membership and be lively and useful in the development of Retail Planning Policy at national level. Most of the Studies are of a scale that requires separate publication. Some however - though no less relevant - are smaller, or have a format unsuited to separate publication. Others still, called "occasional papers" - are short papers setting out the results of specific studies by Forum members which the Research Group believe deserves wider circulation and discussion. This is one of what is hoped will be a series of such papers. In all cases the content of the papers is the responsibility of the authors.

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Executive Summary

Introduction

The health of town centres is an important and topical political issue. The high street is an integral part of the town centre and a major concern has been the impact of out-of-centre retailing on the vitality of traditional town centres.

The purpose of this research is to determine whether out-of-centre superstores have a positive or negative net impact on local retail employment.

Methodology

The change in local retail employment between 1991 and 1995 is analysed for various categories of retail business.

5km, 10km and 15km catchment areas are defined for 93 superstores which opened between 1991 and 1995.

The effect of superstore openings is isolated from other factors by comparing the catchment areas to the trend in employment in Great Britain as a whole.

Employment is measured in terms of full-time equivalent employees.

Key Findings

This analysis provides strong evidence that new food superstores have on average, a negative net effect on retail employment.

Within the 15km catchment areas of the 93 superstores, employment in specialist food retailers declined by -24,988 (-29.4%), offsetting the 10,419 (+5.4%) increase in full-time equivalents employed in the superstore sector and resulting in a net decrease of -14,569 ftes (-5.2%) in the overall food retailing sector.

There was also a decline in non-food retail employment of -9,901 ftes (-1.7%), resulting in a decline in total retail employment of -24,471 (-2.9%).

The net impact of the 93 superstore openings is estimated to be a reduction of -25,685 full-time equivalent employees or -3.0%. This is based on a comparison of trends inside the 15km catchment areas with trends outside the catchments,

Each superstore opening resulted in an average net loss in employment of -276 full-time equivalents.

Conclusions

These results have important implications for planning proposals for further out-of-centre food superstore development. Whilst there will be some variation in local employment circumstances, in general the assumption should be that future superstore development will have a net negative impact on retail employment.

Introduction

The health of town centres is an important and topical political issue. It has been the subject of several reports commissioned by the Department of the Environment culminating in a review of planning policy guidance. The high street is an integral part of the town centre and a major concern has been the impact of out-of-centre retailing on the vitality of traditional town centres. Over the past ten years, out-of-centre retail developments have included regional shopping centres such as the Metro Centre and Meadowhall, and retail parks combining both large food and non-food retail outlets.

Grocery superstores are not new: the first superstores opened over thirty years ago. They have become an established part of the retail scene and account for 26% of total retail employment (Office for National Statistics, 1997). However, their continued expansion out-of-centre is still seen as threat to high streets, particularly in the case of market towns and district centres. Hence the Department of Environment recently commissioned Hillier Parker and Savell Bird and Axon to research the impact of large food stores on market towns and district centres (Hillier Parker, 1997). In addition, the food superstores have in recent years, extended their offer to include comparison goods such as clothing and household goods. This poses an additional threat to traditional high street retailing.

While there remains continued debate about the impact of out-of-centre superstores, there is very little up to date research available which attempts to measure the impact. This research paper attempts to fill the gap by examining the economic impact of out-of-centre superstores in terms of employment. Specifically, the purpose of this paper is to determine whether out-of-centre superstores have had a positive or negative impact on local employment. It is hypothesised that a new out-of-centre superstore will draw trade from existing high street stores. Some of these high street stores will eventually cease trading. Others will shed labour in response to their loss of market share. In both cases there will be a negative impact on retail employment, which may or may not offset the new jobs created by the superstore.

This report discusses previous research into this topic, before providing additional evidence based on an analysis of retail employment trends in the catchment areas of a sample of out-of-centre food superstores which opened in the early 1990s.

Literature Review

The economic impact of superstores received much attention in the 1970s and 1980s. Early proponents of out-of-centre retailing saw the generation of employment as a discrete and beneficial effect of grocery superstore development. But research in the 1980s cast doubt on the net employment generating effect of out-of-centre development in all cases (BDP/OXIRM 1992).

Sparks (1981) recognised that large numbers of jobs are created by new superstores, but identified that there were two negative impacts on employment. Firstly, by taking trade from existing retailers, superstores might force existing shops to close or cutback on staff. Since many of these existing retailers will be more labour intensive specialists and independents there might be a net loss in jobs. Secondly, superstores' adoption of labour saving new technology might reduce the number of new jobs in the longer run. There is a good deal of evidence to show how technology has helped produce in-store productivity gains and more cost-effective and responsive re-ordering and stock control systems (Burt and Dawson, 1991).

National employment trends have provided some evidence of food superstore employment effects. Freathy & Sparks (1994) point to the long-term decline in the total food retail workforce as evidence of structural changes in the industry and of the replacement of labour with capital mainly by food superstores. They argue that job losses amongst independent food retailers has more than offset the growth in superstore employment. In addition they claim that the decline in the number of working owners and the self employed in food retailing has been even greater than the decline in employees.

London Economics (1995) draw a different conclusion from employment trends. They argue that although food retail employment has declined, it has risen in proportion to total UK employment. Many of the jobs in the food sector would not now exist were it not for the growth of superstores. Rather than "crowding out" existing employment, superstore jobs have replaced those lost in the manufacturing sector.

London Economics (1995) claim that superstore employment has increased, not just because superstores have increased their share of the grocery market but also because they have helped to expand the grocery market itself. The greater efficiency of grocery superstores has enabled lower food prices and improvements in quality and range of product.

At a local level it has been more difficult to find evidence for the effects of superstores on employment. In a study of retail employment change in Scotland, the Scottish Office (1982) predicted that there would be a loss of jobs in other retail establishments leading to an overall net loss of jobs. However they could find no evidence to support this hypothesis. On the contrary, all the evidence examined during the course of the study pointed to superstore development giving rise to a net increase in retail employment locally.

In a follow up study of the effects of an out-of-centre Fine Fare superstore in Elgin, the Scottish Development Department (1984) concluded that the superstore did not appear to have generated a large increase in employment, nor led to a substantial decline, The increased employment in Elgin was at the expense of smaller settlements.

Harvey Cole (1983) examined employment trends in the Caerphilly and Eastleigh employment exchange areas in which Carrefour hypermarkets had opened. The trends in retail employment, total employment and unemployment were examined for the period from before the opening of the hypermarkets until several years after they had started trading. The results showed that in both cases there had been an increase in retail employment following the opening of the stores, and the gain was sustained in the succeeding years. At Caerphilly, there was a net increase in retail employment of over 400 people, but it was also noted that sales per employee at Carrefour were well above average.

In 1991 Lee Donaldson Associates concluded that there was still little substantive evidence on the adverse impact of superstores:

"In no instance, despite the growth of superstores throughout the country, has an authority been able to substantiate impact on the basis of firm survey data and report demonstrating that any particular superstore has resulted in severe adverse impact"

(Lee Donaldson Associates 1991).

In a study of the Metro Centre, Howard (1989) identifies five reasons why research has failed to provide conclusive and consistent evidence of net employment effects:

(1) the general difficulty of collecting evidence one way or the other
(2) the tendency for the employment impact to be spread more widely than anticipated
(3) the delayed effect of poorer trading upon employment levels in established centres
(4) the substitution of changes in working hours for job losses
(5) the masking of employment impact by buoyant trading conditions

BDP/OXIRM (1992) suggest that research results are dependent on local circumstances such as the existing mix of retailing and employment opportunities, and could not be generalised for all urban settings.

Other commentators have suggested that there may be countervailing forces to the negative impact of superstores on the trade and employment of other retailers. Sparks (1981) suggested that the small scale of the independent retailer may make labour shedding impracticable. This might lead to the substitution of reduced working hours for job losses also identified by Howard (1989).

Sparks (1981) also suggested that while superstores took a major share of grocery trade in the form of 'bulk' shopping trips, the specialist grocer retained a share of the market due to 'top-up' shopping trips. At a recent public inquiry at Stroud, the inspector took the view that this two-tier hierarchy in food shopping, in which bulk grocery shopping takes place in superstores and top-up shopping in smaller outlets, is now so well established that specialist trades and grocers are little affected by new superstores, which only compete against existing superstores (Hillier Parker, 1997).

Cole (1983) pointed to a probable explanation of the apparent paradox of highly efficient superstores producing a rise in employment rather than a contraction. He said the answer lay in the character of the superstores and the kind of jobs that are being done within them. A large proportion of jobs in a superstore such as stock handling, baking and catering, are not directly competitive with those in smaller retail outlets. To the extent that they are displacing employment elsewhere the displacement could take place in food manufacturing and processing, warehousing and wholesale distribution, or catering. This displacement might be far beyond the local catchment area. Many of the other jobs in a superstore would not exist without it.

Other research has emphasised the quality as well as the number of jobs effected by superstores. In a study of three food superstore operators, Dawson et al (1986) found that the work force was predominantly part-time and overwhelmingly female:

" There is a clear correlation between female and part-time work and ... female part-time workers, comprising half the food superstore workforce, are crucial to retail operations of this form."

Therefore, head count measures of employment which give equal weight to full-time and part-time jobs, give a more favourable picture of superstore employment than full time equivalents or hours worked.

London Economics (1995) argue that the creation of part time jobs is desirable because it caters for the needs of women and students who are unable to take full-time work. In addition, part-time work creates flexibility in the labour market which is essential for competitiveness and economic growth.

The need for part-time staff partly reflects extended trading hours, but it is also a result of the substitution of capital for labour. Some of the part-time jobs are therefore low skilled. Although the introduction of fresh fish, bakery and delicatessen operations within grocery superstores has increased skill levels in these outlets, it does so with greater productivity and offers a further challenge to small food shops, perhaps depleting the overall skill level and diversity of employment opportunities within town centres (BDP/OXIRM 1992).

In addition to skills and hours worked, the quality of jobs can be measured in terms of pay, benefits, training, career progression and job satisfaction. London Economics (1995) argue that food superstore pay and benefits compare favourably with other multiple retailers and with occupations with a similar skills level, especially when the lower average age of food store employee is taken into account.

Methodology

The review of literature highlighted the importance of isolating the impact of food superstores from other factors effecting employment. The methodology employed here attempts to control for most of these factors in four ways:

1) Comparison against national employment trends

Retail employment has been impacted by technological changes (e.g. introduction of Electronic Point of Sale), cultural changes (e.g. increase in female part time working) and consumer tastes and fashion. In order to isolate the impact of food superstores from the other diverse trends in retailing, employment in a sample of superstore catchment areas was compared to total employment for Great Britain. If the decline in employment in the food superstore catchment areas is greater than the decline nationally, this would be taken as evidence of a negative impact of the superstores.

2) A relatively large sample of food superstore catchment areas

By selecting a relatively large sample of food superstore catchment areas, the employment effect of food superstores can be isolated from the many variations in local circumstances noted by BDP/OXIRM (1992). Although there would be variation in the trends between catchment areas, it was hypothesised that on average, there might be a relationship between food superstore employment and other retail employment.

3) Industrial sub-categories of retail employment data

Some research has pointed to the general decline in employment in town centres (DoE/URBED 1994). To isolate the effect of superstores, employment trends in industrial sub-categories were examined to identify the main direct and indirect effects of superstores. It was hypothesised that a new superstore would have the direct effect of increasing employment in the non-specialised food store category. An indirect and significantly negative impact would be expected in the specialised food retail category. If the two trends combined resulted in a net reduction in employment, this would be a necessary but not sufficient condition for there to be knock-on effects on other retail sectors. These indirect, knock-on effects on other retail sectors might also be revealed in the relevant retail sector data. Beyond the scope of this research is an examination of other industrial sectors to test the other knock-on effects noted by Cole (1983) and also the impact on self-employment in independent shops.

4) Calculation of full-time equivalents

Dawson et al (1986) noted that superstores have employed a greater proportion of part-time staff than other retail outlets. It was hypothesised that the trends in "head count" employment would appear more favourable than the trends in "hours worked" or "full time equivalents". In order to reflect the quality of employment, "full-time equivalents" have been calculated from the number of part-time and full-time workers using national average hours worked for the total retail sector. Consideration of other quality aspects of employment are beyond the scope of this research.

By looking at employment trends over a one and a half year period, some of the knock-on effects should have worked through. The long time frame may also overcome the problem of the substitution of reduced trading hours for redundancies noted by Sparks (1981).

However, any substitution which persists will not be reflected in the calculation of full time equivalents which is based on the national average hours worked.

Employment data by postal sector was taken from the 1991 Census of Employment and the 1995 Annual Employment Survey, supplied by National On-line Manpower Information System (NOMIS). Up to 1995, the data was collected biennially every other September, by a postal enquiry based on the Inland Revenue's Pay-As-You-Earn (PAYE) register. From 1995, the census has been replaced by an annual survey and includes employment from companies identified from their VAT returns. These companies would previously have been omitted from the survey (Roberts et al, 1996). The Office for National Statistics (ONS) does not at present know how much the employment data increased as a result. This information will be available along with the 1996 Annual Employment Survey results at the end of 1997. They advise that the likely areas where there would have been an impact are in hotel, catering and retail. Therefore, the retail employment figures before 1995 may be artificially low. The discontinuity in the data should not adversely affect the results of the methodology used here, in which trends in a relatively large sample of food superstore catchments are compared to the total retail employment for Great Britain. In proportional terms, the discontinuity should have an equal effect on both the sample and the GB total.

The Census of Employment and Annual Employment Survey are both covered by the Statistics of Trade Act 1947 which places a statutory obligation on employers to complete and return survey forms and so the response rate is over 90%. The coverage includes all businesses with more than one workplace and employing more than 25 people. Other businesses are sampled and the results extrapolated on the basis of PAYE information. Given the complexity of the data, some errors come to light only after detailed analysis by users so that the results are classified as provisional for the first 12 months (Roberts et al, 1996; Taylor & Lewis, 1993).

The data used for this analysis was collected in September 1991 and September 1995. The geography of the figures is at postal sector level (e.g. NG2 3). Separate figures are given for the number of full-time and part-time employees. The following standard industrial classification (SIC92) categories were selected:

SIC52 Total retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

SIC5211 Retail sale in non-specialised stores with food, beverages or tobacco predominating. This category mainly comprises large grocery superstores, but also includes smaller grocery discounters and convenience stores such as Kwik Save and some "corner shops". Marks and Spencer, which has a important share of the food market is excluded.

SIC522 Retail sale of food, beverages and tobacco in specialised stores (specialised food retailers such as bakers, butchers, fishmongers, green grocers, off-licences and tobacconists)

Both SIC5211 and SIC522 are contained within SIC52 (total retail).

The figures were converted to full-time equivalents to allow for the increase in part-time employment between 1991 and 1995. These were calculated using the average weekly hours worked by full and part-time employees in the retail trade by year obtained from the ONS Labour Force Survey.

Full-time equivalent employees (fte) were calculated by dividing the average part-time hours (Ave.PT hours) by the average full-time hours (Ave. FT hours), multiplying by the part-time employees, and then adding the result to the full-time employees. The calculation was done for both 1991 and 1995 and is shown as an equation below

$$FTE_{t,i} = ((\text{Ave.PT hours}_{t,52} / \text{Ave.FT hours}_{t,52}) \times \text{PT Employees}_{t,i}) + \text{FT Employees}_{t,i}$$

Where t=1991,1995 and i=SIC52,SIC5211 and SIC522

There may be some variation in the average hours worked between the retail sub categories. For example, part-time workers may on average work longer hours in food superstores compared to some other retail outlets. The grocery trade is fairly evenly spread over the week and so many part-timers in food superstores are employed for more than 20 hours a week. In contrast, in sectors such as fashion, shoes and music, 50% of trade is concentrated on Saturday and many part-time staff are employed for only 8 hours per week on a Saturday only basis. In addition, the average hours worked by part time staff may have increased between 1991 and 1995 due to the growth in Sunday trading. Ideally, the calculation of full-time equivalents would have been based on the average hours worked in the relevant retail sector, but there are no figures available.

A list of recently opened food superstores was obtained from the Institute of Grocery Distribution (IGD). For the purpose of identifying the impact on employment between September 1991 and September 1995, only those food superstores that had opened between October 1991 and February 1994 were included in the analysis. This would leave a minimum of one and a half years for any employment effects to take place before the 1995 Census of Employment. In order to measure the impact of large out-of-centre superstores, only superstores with more than 25,000 sq. ft. of net sales floorspace and those further than one kilometre from the nearest High Street were included in the sample. High Streets were defined as retail centres containing at least one high street bank and were identified from a list of shopping locations from CACI Ltd.

A final criterion was to exclude superstores within 10km of a regional shopping centre opening between 1989 and 1995. Regional shopping centres are equivalent to new high street locations, employing around 4000 shop workers and have been shown to have a significant effect on existing high streets (DoE, 1993; Howard & Davies, 1992). The direct and indirect employment effects of regional shopping centres would have muddied the results for the superstores. As a result of this criterion, four superstores were excluded from the sample, two near Meadowhall and two near Lakeside regional shopping centre. The final count of superstores in the sample was 93. A list of the superstores in the sample is included as an Appendix.

The sample was then evaluated to see whether it was representative. Table 1 shows that the bulk of the sample is made up of Sainsbury and Tesco superstores. ASDA was not actively expanding during the period. Table 2 shows that most superstores are between 25,000 and 40,000 square feet in size.

Map 1 shows the geographical spread of the food superstores in the sample. The sample is fairly evenly spread around the country with some concentration around the conurbations.

Table 1. Food Superstore Sample by Fascia

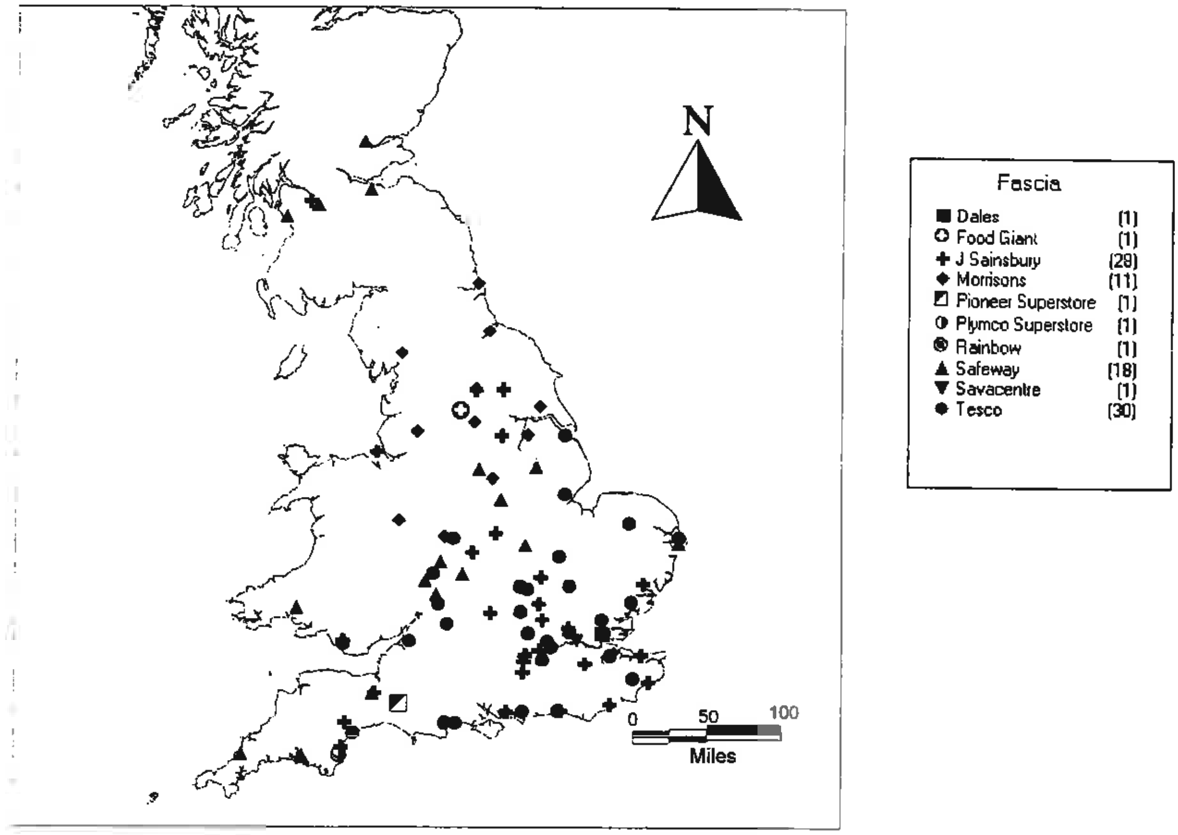
Fascia Name	Count
Dales	1
Food Giant	1
J Sainsbury	28
Morrisons	11
Pioneer Superstore	1
Plymco Superstore	1
Rainbow	1
Safeway	18
Savacentre	1
Tesco	30
Total	93

Source: Institute of Grocery Distribution

Table 2. Food Superstore Sample by Sales Area

Sales Area (Sq Ft)	Count
25000 - 30000	20
30001 - 35000	30
35001 - 40000	23
40001 - 45000	15
45001 - 50000	2
50001 +	3
Total	93

Map 1. The Geographical Spread of 93 Food Superstores Sampled in the Analysis



The geographic spread of the sample is also examined by looking at the food superstore count by region to see if it coincides with the 1991 population (Table 3). A comparison is also made with the count of all food superstores opened between October 1991 and

February 1994, i.e. including those less than 25,000 sq. ft in size and within 1km of a high street. It can be seen that the sample appears to be over-representative of East Anglia and the South West, when compared to regional population. The over-representation is less marked when the sample is compared to all superstore openings. Similarly, the sample is under-representative of the North West when compared to population, but less so compared to all superstores. Scotland is under-represented with respect to both population and all superstores, because many superstores were excluded on the size and out-of-centre criteria.

Table 3. Population and Food Superstores by Region

Region	1991 Population (Thousands)	%	Food Superstore Sample	%	All Food Superstores Opened 10/91-2/94	%
North	3,084.2	5.50%	3	3.23%	6	2.01%
Yorks & Humberside	4,954.2	8.84%	9	9.68%	27	9.06%
East Midlands	4,025.7	7.18%	7	7.53%	26	8.72%
East Anglia	2,091.1	3.73%	7	7.53%	16	5.37%
South East	17,557.6	31.32%	34	36.56%	104	34.90%
South West	4,723.4	8.43%	15	16.13%	39	13.09%
West Midlands	5,254.8	9.37%	8	8.60%	23	7.72%
North West	6,377.4	11.38%	2	2.15%	15	5.03%
Scotland	5,100	9.10%	5	5.38%	32	10.74%
Wales	2,886.4	5.15%	3	3.23%	10	3.36%

Sources: Office for National Statistics (1997); Authors' analysis

It was concluded that the sample was only slightly biased towards some regions and in order to retain as large a sample of superstores as possible, no adjustment was made to achieve a more representative geographic spread.

Three superstore catchment area sizes of 5km, 10km and 15km radii were chosen to measure the influence of new superstores as it diminished over distance. The catchment areas for each food superstore were defined by measuring the straight line distance between the grid reference of the superstore and the centroids of the surrounding postal sectors. Straight line distance was taken rather than drive time because straight line distance had the advantage of transparency and ease of calculation. Calculating drive times for each superstore would have been very time consuming, particularly if slower average driving speeds were assumed for large conurbations.

The appropriate retail employment figures for these catchment areas were then summed and compared to the national average. Some superstore catchment areas overlapped, particularly at the 15km radius. In totalling employment by catchment area size, each postal sector was counted only once.

Results

The percentage change in retail employment between 1991 and 1995 was calculated for Great Britain as a whole and for the summed 5km, 10km and 15km sample catchments. The change calculated as a percentage enables a direct comparison between the sample catchments and the national average. The percentage changes in employment are shown in chart 1 and table 4.

Between 1991 and 1995, food superstore employment rose by 10.7% on average in Great Britain. A higher growth of 13.0% was experienced in the 5km catchments. This was as expected and reflects the direct job creation of the new superstores themselves. Interestingly, the food superstore employment increase in the 10km and 15km catchments were only 6.7% and 5.4% respectively, i.e. below the national average, which suggests that the new superstores had a negative employment impact on existing superstores and supermarkets.

Specialist food employment fell by -28.5% in Great Britain as a whole, but the decline was even greater in the 5km catchments (-34.3%). In the 10km and 15km catchments the decreases of -29.0% and -29.3% respectively, were only slightly higher than the GB average but were associated with smaller increases in food superstore employment. Not all of the decline in specialist food employment will be due to superstore openings. Other retail outlets such as Marks and Spencer and petrol station shops have increased their share of the grocery trade at the expense of specialist food retailers. However, the impact of these outlets should be no greater in the superstore catchments than in Great Britain as a whole. Therefore, the greater decline in specialist food employment in the superstore catchments provides strong evidence for the new superstores' negative impact on existing specialist food retailers.

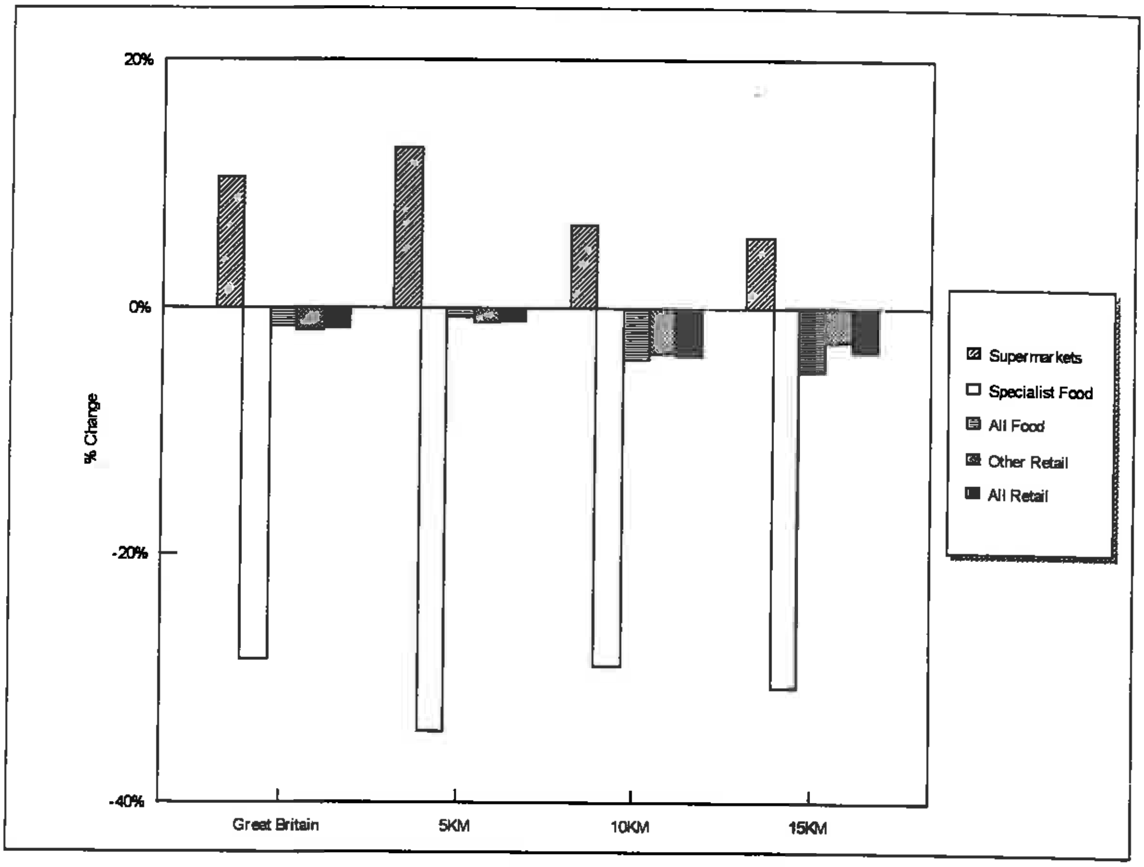
Nationally, the increase in superstore employment was more than offset by the decline in specialist food employment resulting a net decrease in total food sector employment of -1.5%. Perhaps surprisingly, there is also a net reduction in total food employment in the 5km catchment, in spite of the direct job creation of the new superstores. The net reduction of -0.7% in food retail was less than the GB average. In the 10km catchments the increase in food superstore jobs was more than offset by the decline in specialist retailers giving a net decrease in all food retailer jobs of -4.2%, a decline significantly greater than the national average. In the 15km catchments, the decrease in total food employment is -5.21%, which is more than three times the GB average. **This is strong evidence that the net employment effect of new food superstores is negative.**

Evidence of a negative impact on non-food retail sectors is less conclusive. The decline in non-food retail employment in the 10km catchments was -3.7% compared to only -1.8% nationally. This is consistent with the hypothesis of superstores having a negative knock-on effect on non-food retailers. In the 5km and 15km catchments, there is also a decline in non-food employment of -1.2% and -1.7% respectively, but the decline is slightly less than the GB average. Other factors will undoubtedly have played a role in these results. Over 50 retail parks and 27 clusters of retail warehouses opened between 1991 and 1995 within 10km of the superstores in the sample. These retail parks and clusters accounted for over 330 new retail units and over 7 million square feet of gross floorspace. Many of the superstores will be located on these retail parks and clusters and so the direct non-food employment resulting from the retail warehouse development will be included in the 5 km catchment areas. Since employment change in the 5km catchments is likely to be inflated by direct effects of new retail warehouses, the figures suggest that food superstores have a negative impact on the non-food retail sector.

The negative percentage changes in both specialist food and non-food employment in the 10km and 15km catchment areas are perhaps particularly surprising given the below national average increase in food superstore employment within these catchments. This is strong evidence that new out-of-centre superstores have a negative net impact on retail employment up to 15km away.

The combination of direct and indirect effects produces a net decline in total retail employment. The decline in the 10km and 15km catchment areas was -3.9% and -2.9% respectively, compared to a -1.7% decline nationally. In the 5km catchment areas, the direct employment created by new food superstores and retail warehouses is offset by the decline in specialist food outlets resulting in a decline in total retail employment. The decline of -1.1% is less than the national decrease of -1.7%.

Chart 1. Change in Employment by Retail Sector 1991 - 1995, in GB, 5km, 10km and 15km Out-of-Centre Superstore Catchments. (Full Time Equivalents)



Remember, that the changes to the ONS survey procedures mean that the 1991 figures are understated. Therefore, the decreases on 1991 may actually have been worse than these official figures indicate.

The absolute levels and changes in employment are shown in Table 4. The 5km catchments encompassed 71,242 food superstore employees in 1995, which represents 18.9% of the Great Britain total. While not all of these employees are in out-of-centre superstores, this does give an indication of the size of the sample and the significance of the results. In terms of total retail employment, the 5km catchments also encompassed 18.9% of the GB total, indicating that the sample is representative of the hierarchy of retail locations.

The increase in food superstore ftes in the 5km catchments of 8,197 represents 22.5% of the national increase in food superstore employment. Given that the sample includes virtually all out-of-centre superstores larger than 25,000 square feet, one might expect a higher proportion of the national increase in superstore employment to be included in the 5km catchments. By identifying the individual postal sectors in which the 93 new superstores are located, and summing superstore employment in those postal sectors, we get a fairly good measure of the direct job creation of the new superstores. In 1991, the 93 postal sectors contained 4,374 full-time equivalents. By 1995, the figure had increased by 13,190 to 17,564. The 13,190 jobs created by the new superstores account for 36.2% of the national total increase in superstore employment. But why are there only 8,179 additional superstore jobs in the 5km catchments? The new superstores employed 13,190 full-time equivalents, but by taking business away from existing superstores and supermarkets there was a loss of 5,011 jobs elsewhere within the 5km catchment, resulting in a net employment increase of only 8,179.

The 13,190 superstore jobs in the 93 postal sectors represents an average of 142 full-time equivalents per superstore. Other research has shown an average superstore employment of around 195 ftes (Dawson et al, 1986a). This suggests that the superstore employment increase in the 93 postal sectors underestimates the ftes employed by the new superstore sample, because of an offsetting reduction in the 4,374 ftes employed by existing superstores and supermarkets within the same postal sectors in 1991. By comparison, 93 superstores employing 195 ftes each, would give a total employment of 18,135, which is slightly higher than the 17,564 superstore ftes in the 93 postal sectors in 1995.

Table 4 shows more clearly how the direct and indirect employment effects of the superstores combine to produce a negative net effect. However, it should be remembered that other factors will be impacting on these absolute changes and they should be interpreted in comparison with the national trends.

Within the 5km catchment area, additional food superstore employment of 8,197 is more than offset by the reduction in specialist food employment of -8,840, which combined with the decline in non-food retail results in a net decline in total retail employment of -2,817. In the 10km catchment areas, the increase in food superstore employment of 8,319 is more than offset by the decline in specialist food of -15,891, which combined with the decline in non-food, produces a net decline in total retail employment of -20,885. Similarly, in the 15km catchments direct superstore job creation of 10,419 is offset by negative indirect effects to produce a net decline in total retail employment of -24,471.

Table 4. Employment by Retail Sector, 1991 - 1995, in GB, 5km, 10km and 15km Out-of-Centre Superstore Catchments. (Full Time Equivalents)

Great Britain Total	Food Superstores	Specialist Food	All Food	Other Retail	All Retail
1991 FTEs	341,440	153,150	494,590	931,530	1,426,120
1995 FTEs	377,841	109,453	487,294	915,181	1,402,475
1991 - 1995 Change	36,401	-43,697	-7,296	-16,349	-23,645
1991 - 1995 % Change	10.66%	-28.53%	-1.48%	-1.76%	-1.66%
5KM Radius Catchment	Food Superstores	Specialist Food	All Food	Other Retail	All Retail
1991 FTEs	63,046	25,752	88,797	179,177	267,974
1995 FTEs	71,242	16,911	88,154	177,003	265,157
1991 - 1995 Change	8,197	-8,840	-644	-2,174	-2,817
1991 - 1995 % Change	13.00%	-34.33%	-0.72%	-1.21%	-1.05%
10KM Radius Catchment	Food Superstores	Specialist Food	All Food	Other Retail	All Retail
1991 FTEs	123,714	54,765	178,479	360,142	538,621
1995 FTEs	132,033	38,874	170,908	346,828	517,736
1991 - 1995 Change	8,319	-15,891	-7,571	-13,313	-20,885
1991 - 1995 % Change	6.72%	-29.02%	-4.24%	-3.70%	-3.88%
15KM Radius Catchment	Food Superstores	Specialist Food	All Food	Other Retail	All Retail
1991 FTEs	194,394	85,057	279,451	569,663	849,115
1995 FTEs	204,813	60,069	264,882	559,762	824,644
1991 - 1995 Change	10,419	-24,988	-14,569	-9,901	-24,471
1991 - 1995 % Change	5.36%	-29.38%	-5.21%	-1.74%	-2.88%

The new superstores account for the 8,197 increase in jobs within the 5km catchments. However, in the 10km catchments which contain almost twice as many food superstore employees, the increase in jobs was only 8,319 (+6.7%). Given the national average increase in superstore employment of 10.7%, a much higher number of jobs would have been expected in the 10km catchments. This suggests that the new superstores had a negative impact on competitors' employment in the 5km to 10km zone.

This is more clearly shown in table 5 which shows the employment in the catchment zones 0-5km, 5-10km and 10-15km from the new food superstores. The increase in food superstore employment was only 123 (+0.2%) in the 5-10km zone and only 2,100 (+3.0%) in the 10-15km zone. On the basis of national trends, a 10.7% increase would have been expected, equivalent to a rise of 6,491 and 7,563 in the 5-10km and 10-15km zones respectively. This is strong evidence that new superstores curb the employment growth of their direct competitors.

The decline in specialist food employment was -7,050 in the 5-10km and worsened to and -9,097 in the 10-15km zone. These changes are similar to the -8,841 decline within the 5km catchment area suggesting strong negative knock-on effects up to 15km away from the new food superstores. In percentage terms, these changes are broadly similar to the decline nationally, but are associated with small increases in superstore employment within the same zones. These decreases in specialist food and non-food employment could only be the result of knock-on effects of the new food superstores up to 15km away.

Since the sample of 93 superstores excludes in-centre superstores and supermarkets smaller than 25,000 square feet, could the expansion of these superstores and supermarkets have impacted on the specialist food retailers? Remember that the food superstore employment figure includes all in-centre superstores and supermarkets of all sizes. The -30.0% decline in specialist food employment in the 10-15km zone might conceivably be influenced by in-centre superstores and supermarkets which fall outside the 15km catchment zone. However, the same could not be argued for the 5-10km zone. Since there was virtually no superstore or supermarket employment growth either within the 5-10km zone, nor in the surrounding 10-15km zone. The -24.3% decline in specialist food employment in the 5-10km zone could only be due to the new superstores in the sample. **This result is strong evidence of the negative effects of superstores on specialist food employment up to 10km away.**

The most significant decline in non-food retail employment was within the 5-10km zone (-11,140). Given the small increases in superstore employment in the 5-10km and 10-15km zones, this decline could only be due to the new superstores in the sample. In the 10-15km zone, non-food employment increased by 3,413 which suggests that the negative knock-on impact on non-food retail diminishes beyond 10km.

Table 5. Change in Employment by Retail Sector, 1991 - 1995, in 0-5km, 5-10km and 10-15km Superstore Catchment Zones (Full Time Equivalents)

Catchment Zone	Food Superstores	Specialist Food	Total Food	Other Retail	All Retail
0 - 5 km Catchment					
1991 - 1995 Change	8,196	-8,841	-643	-2,174	-2,817
1991 - 1995 % Change	13.00%	-34.33%	-0.72%	-1.21%	-1.05%
5 - 10 km Catchment					
1991 - 1995 Change	123	-7,050	-6,928	-11,140	-18,068
1991 - 1995 % Change	0.20%	-24.30%	-7.73%	-6.16%	-6.68%
10 - 15 km Catchment					
1991 - 1995 Change	2,100	-9,097	-6,998	3,413	-3,586
1991 - 1995 % Change	2.97%	-30.03%	-6.93%	1.63%	-1.15%

To measure the employment impact of the new superstores, one must compare actual employment change against an expected trend, that is, the trend expected had the superstores not opened. Employment in the catchment areas could be compared to the employment change in the GB as a whole. However, this may understate the impact of the superstores, because GB employment includes the 15km catchment areas and hence also includes the impact of the superstores. To more accurately estimate the impact of the new superstores, the catchment areas should be compared to 'the rest of GB', that is, GB outside the 15km catchment areas (as shown in table 6). Retail employment actually increased by 0.1% in GB outside the 15km catchment areas. If this improving trend had been followed within the catchment areas, total retail employment would have risen by +1,214 (+0.1%) instead of falling by -24,471 (-2.9%). In other words, if the superstores had not opened, employment would have risen. All of the reduction in employment that occurred in the catchment areas is attributable to superstore openings. The difference between the actual decline of -24,471 and the expected increase of +1,214 implies that the opening of superstores resulted in a reduction in total retail employment of -25,685 or -3.0%. **This is equivalent to an average net loss in employment of -276 ftes per superstore.**

Table 6. Change in Total Retail Employment 1991 to 1995 in 93 Food Superstore Catchments and the Implied Impact of the Superstore Openings

	Change in Full-Time Equivalents (Thousands)	Change in Full-Time Equivalents (Percentage)
A Actual change in employment in 15km catchments	-24,471	-2.9%
B Expected on basis of trends outside of 15km catchments	+1,214	+0.1%
C Implied Effect of Superstores (A less B)	-25,685	-3.0%

Sensitivity Analysis

A number of tests have been undertaken to evaluate the reliability of the results. The first test examines the effect of excluding Scotland from the sample and the national total employment. The sample is unrepresentative in Scotland because of the high proportion of Scottish superstores which are close to high streets and which are below 25,000 square feet in floorspace. Scotland was also less effected by the recession of the early 1990s. Table 7 shows the effect of excluding Scotland. The impact on the sample results is not very significant because the sample includes only 5 Scottish superstores. The decline in specialist food, non-food and total retail employment are all greater in England and Wales than for Great Britain, both for the catchment areas and for the national total. The conclusions are the same as those drawn from the Great Britain analysis.

Table 7. Percentage Change in Employment by Retail Sector in England and Wales

Catchment	Super-stores	Specialist Food	All Food	Other Retail	All Retail
England & Wales Total	11.98%	-30.82%	-1.10%	-2.66%	-2.12%
5km Catchment	13.87%	-34.98%	-0.15%	-1.67%	-1.17%
10km Catchment	6.67%	-30.37%	-4.11%	-5.46%	-5.01%
15km Catchment	5.78%	-30.72%	-5.11%	-2.75%	-3.52%

Table 8 shows the effect of varying the size of catchment area. The results for a 12km radius catchment area are consistent with the results for the 10km and 15km catchment areas. In the case of a 6km catchment area, some of the percentage changes are markedly different to the 5km catchment area, but are consistent with the overall trends and the same conclusions can be drawn. Within the 6km catchments, the increase in the superstore employment is less and the decrease in total food and non-food retail are greater than for the 5km catchments. As a result, the 6km catchments show a more significant decline in all retail employment and hence provide stronger evidence for superstores' negative net impact on retail employment.

Table 9 shows the effect of changing the definition of superstore and of excluding head office employment. When the sample is expanded to include all superstores over 10,000 square feet, the only significant change to the results is a greater increase in superstore employment in the 5km catchments. However this increase is offset by a greater decline in employment in specialist food in the 15km catchment areas. The conclusions are unchanged.

The effect of including all in-centre superstores larger than 10,000 square feet is more significant, but again the conclusions are unchanged. The in-centre superstores' direct employment creation is not offset by a reduction in competitors' jobs in the 10km and 15km catchments. There is still a decline in total retail employment for all catchment sizes, and this decline is greater than the GB average for 5km and 10km catchments.

Retail employment includes the head office staff of retail companies. Some postal sectors are effected by changes in head office employment which reflects national conditions, rather than store employment, which reflects local conditions. To test whether head office employment might effect the catchment results, postal sectors containing major retail head offices were excluded from the sample. Unfortunately, some of these postal sectors will include both head offices and stores. Table 8 shows that the result was a greater rise in superstore employment which was mostly offset by a greater decline in specialist food. The conclusions are unchanged.

Table 8. Sensitivity of Results to Catchment Size

5KM Radius Catchment	Food Superstores	Specialist Food	All Food	Other Retail	All Retail
1991 FTEs	63,046	25,752	88,797	179,177	267,974
1995 FTEs	71,242	16,911	88,154	177,003	265,157
1991 - 1995 Change	8,197	-8,840	-644	-2,174	-2,817
1991 - 1995 % Change	13.00%	-34.33%	-0.72%	-1.21%	-1.05%
6KM Radius Catchment	**Food Superstores**	**Specialist Food**	**All Food**	**Other Retail**	**All Retail**
1991 FTEs	75,623	31,885	107,508	216,715	324,224
1995 FTEs	82,296	20,587	102,884	208,613	311,496
1991 - 1995 Change	6,673	-11,298	-4,625	-8,103	-12,727
1991 - 1995 % Change	8.82%	-35.43%	-4.30%	-3.74%	-3.93%
10KM Radius Catchment	**Food Superstores**	**Specialist Food**	**All Food**	**Other Retail**	**All Retail**
1991 FTEs	123,714	54,765	178,479	360,142	538,621
1995 FTEs	132,033	38,874	170,908	346,828	517,736
1991 - 1995 Change	8,319	-15,891	-7,571	-13,313	-20,885
1991 - 1995 % Change	6.72%	-29.02%	-4.24%	-3.70%	-3.88%
12KM Radius Catchment	**Food Superstores**	**Specialist Food**	**All Food**	**Other Retail**	**All Retail**
1991 FTEs	155,822	68,594	224,417	448,425	672,842
1995 FTEs	163,626	48,921	212,547	439,563	652,110
1991 - 1995 Change	7,803	-19,673	-11,870	-8,862	-20,732
1991 - 1995 % Change	5.01%	-28.68%	-5.29%	-1.98%	-3.08%
15KM Radius Catchment	**Food Superstores**	**Specialist Food**	**All Food**	**Other Retail**	**All Retail**
1991 FTEs	194,394	85,057	279,451	569,663	849,115
1995 FTEs	204,813	60,069	264,882	559,762	824,644
1991 - 1995 Change	10,419	-24,988	-14,569	-9,901	-24,471
1991 - 1995 % Change	5.36%	-29.38%	-5.21%	-1.74%	-2.88%

Table 9. Sensitivity of Percentage Change in Employment by Sector to Superstore Definition and Head Office Employment

Catchment	Super-stores	Specialist Food	All Food	Other Retail	All Retail
Great Britain Total	10.66%	-28.53%	-1.48%	-1.76%	-1.66%
Total Sample					
5km Catchment	13.00%	-34.33%	-0.72%	-1.21%	-1.05%
10km Catchment	6.72%	-29.02%	-4.24%	-3.70%	-3.88%
15km Catchment	5.36%	-29.38%	-5.21%	-1.74%	-2.88%
All Out-of-Centre Superstores >10,000 sq ft					
5km Catchment	15.90%	-33.04%	1.76%	-0.81%	0.06%
10km Catchment	6.76%	-29.51%	-4.34%	-2.92%	-3.40%
15km Catchment	6.11%	-30.35%	-5.10%	-1.53%	-2.72%
15km Catchment					
5km Catchment	14.56%	-31.84%	0.60%	-4.34%	-2.79%
10km Catchment	13.64%	-29.75%	0.28%	-3.06%	-1.96%
15km Catchment	12.04%	-29.82%	-0.83%	-1.78%	-1.46%
Sample excluding postal sectors containing retail Head Offices					
5km Catchment	18.76%	-34.46%	3.10%	-3.82%	-1.35%
10km Catchment	11.03%	-30.04%	-1.75%	-3.13%	-2.64%
15km Catchment	7.37%	-29.46%	-4.05%	-1.22%	-2.24%
Sample excluding Replacement Stores					
5km Catchment	13.86%	-34.15%	-0.05%	-0.84%	-0.58%
10km Catchment	7.02%	-29.84%	-4.29%	-3.46%	-3.74%
	. 3%	-29.7 %	- . 8%	- .63%	-2.79%

Conclusions

This analysis provides strong evidence that new food superstores have on average, a negative net effect on retail employment. There is strong evidence of a negative net impact on food retail employment within a 15km catchment area, due to the negative effect on existing food superstores and also on specialist food retailers. There is also evidence that new food superstores have a negative knock-on impact on non-food retail employment within the 10km catchment area.

Within the 15km catchment areas of the 93 superstores, employment in specialist food retailers declined by -24,988 (-29.4%), offsetting the 10,419 (+5.4%) increase in full-time equivalents employed in the superstore sector and resulting in a net decrease of -14,569 ftes (-5.2%) in the overall food retailing sector. There was also a decline in non food retail employment of -9,901 (-1.7%), resulting in decline in total retail employment of -24,471 (-2.9%).

Outside the 15km catchment areas, total retail employment increased by +0.1%. If this improving trend had been followed within the catchment areas, total retail employment would have risen by +1,214 (+0.1%) instead of falling by -24,471 (-2.9%). This difference implies that the opening of superstores resulted in a net reduction in total retail employment of -25,685 or -3.0% (see table 10). **This is equivalent to an average net loss in employment of -276 ftes per superstore.**

Table 10. Change in Total Retail Employment 1991 to 1995 in 93 Food Superstore Catchments and the Implied Impact of the Superstore Openings

	Change in Full-Time Equivalents (Thousands)	Change in Full-Time Equivalents (Percentage)
A Actual change in employment in 15km catchments	-24,471	-2.9%
B Expected on basis of trends outside of 15km catchments	+1,214	+0.1%
C Implied Effect of Superstore Openings (A less B)	-25,685	-3.0%

The results are more conclusive than previous research. There are three probable explanations for this. Firstly, the methodology used here was designed to isolate the employment effect of superstores, which had been masked in previous research by local variations or other factors effecting retail employment. Secondly, the results were obtained for the period 1991 to 1995. Compared to earlier research, the negative impact of new food superstores may have been highlighted during this period due to the increased saturation of the food superstore market and due to recession. Thirdly, the impact on non-food retailers may have increased in the 1990s due to an extension of superstore ranges to include comparison goods.

Given the significant negative impact on retail employment, one might hypothesise that there is also an negative knock-on effect on other industrial sectors. The decline in high street retailing might reduce the number of visits to traditional town centres for recreation, entertainment and eating out. This might result in a decline in employment in the services sector. In addition, superstores have increasingly moved into the provision of services such as pharmacy, travel agency and laundry. The decline in small independent specialist food retailers may also impact on self employment. Further research might be able to evaluate these effects using a similar methodology.

There are also research opportunities to evaluate whether the negative employment effects vary according to the type of high street location (e.g. city centre, neighbourhood centre or market town) or the type of out-of-centre location (e.g. edge-of-centre or out-of-centre; stand alone food superstore or retail park).

These results have important implications for planning proposals for further out-of-centre food superstore development. Whilst there will be some variation in local employment circumstances, in general the assumption should be that future development will have a net negative impact on retail employment.

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Appendix: Full Listing of Food Superstores Used in the Analysis

Fascia	Open date	Address	Town	Postcode	Sales Area (SQ FT)
Morrisons	10/09/91	Newmarket Avenue	THORNABY	TS17 7BW	38,441
J Sainsbury	24/10/91	Monk Cross	YORK	YO3 9NE	34,012
Rainbow	05/11/91	North Quay Industrial Est	LOWESTOFT	NR32 2ED	25,000
Safeway	05/11/91	Tower Road	LOWESTOFT	NR33 7NG	30,000
J Sainsbury	07/11/91	Oxford Road	KIDLINGTON	OX5 2PE	34,023
Tesco	19/11/91	Cowbridge Road	BRIDGEND	CF31 3SQ	44,273
J Sainsbury	26/11/91	Ringmead	BRACKNELL	RG12 7SS	39,973
Safeway	26/11/91	Caledonian Road	PERTH	PH1 5AX	30,000
J Sainsbury	28/11/91	Nicholson Road	TORQUAY	TQ2 7HT	37,983
Tesco	03/12/91	Wessex Fields	BOURNEMOUTH	BH7 7DY	42,966
Tesco	08/12/91	Hewitts Circus Retail Park	CLEETHORPES	DN35 9QR	42,682
Tesco	07/01/92	11 Princess Alice Drive	SUTTON COLDFIELD	B73 6RB	41,290
Tesco	04/02/92	1 Winchester Circus	MILTON KEYNES	MK10 0AH	51,502
Morrisons	04/02/92	Victoria Road	HULL	HU17 8XE	40,000
Tesco	11/02/92	Mayflower Retail Park	BASILDON	SS14 3HZ	43,985
Tesco	18/02/92	Mill Wood Drive	WORCESTER	WR4 0UJ	37,350
Safeway	25/02/92	Gamston District Centre	NOTTINGHAM	NG2 6PS	30,000
Morrisons	03/03/92	Sutton Road	MANSFIELD	NG18 5HT	40,000
Tesco	03/03/92	Crooksfoot	ASHFORD	TN24 0NF	41,486
J Sainsbury	03/03/92	10 Darnley Mains Road	GLASGOW	G53 7RH	39,973
Tesco	03/03/92	Old North Road	ROYSTON	SG8 5UA	31,886
Safeway	24/03/92	Kilwinning Road	STEVENSTON	KA20 3DE	26,100
Morrisons	21/03/92	Fellow Park	WALSALL	WS2 9BX	35,000
J Sainsbury	07/04/92	The Causeway	STAINES	TW18 3AP	37,595
J Sainsbury	14/05/92	Fitzherbert Road	PORTSMOUTH	PO6 1RR	34,098
J Sainsbury	19/05/92	Otford Road	SEVENOAKS	TN14 5EG	34,002
Tesco	26/05/92	London Road	HIGH WYCOMBE	HP10 9RT	29,196
Tesco	02/06/92	New Hammond Beck Road	BOSTON	PE21 7JD	32,446
J Sainsbury	23/06/92	Blackwater Valley Road	CAMBERLEY	GU15 3YN	36,240
Pioneer	25/06/92	Preston Road	YEOVIL	BA20 2HB	30,171
Tesco	21/07/92	Yarmouth Road	LOWESTOFT	NR32 4TZ	32,569
J Sainsbury	04/08/92	Park Farm Road	FOLKESTONE	CT19 5GA	35,659
J Sainsbury	06/08/92	Upton Bypass	WIRRAL	L49 6QG	31,925
J Sainsbury	20/08/92	Cricketers Way	BASILDON	SS13 1SA	36,035
Tesco	25/08/92	Abbots Ripton Road	HUNTINGDON	PE17 2LA	40,978
Tesco	22/09/92	Brook Way	BRISTOL	BS12 9DA	27,176
J Sainsbury	24/09/92	Grove Farm Triangle	ENDERBY	LE9 5WT	36,024
Morrisons	13/10/92	Shap Road	KENDAL	LA9 6DU	33,451
Tesco	27/10/92	Salerton Road	EXMOUTH	EX8 2NP	30,401
J Sainsbury	27/10/92	Old Shoreham Road	HOVE	BN3 7GD	38,940
J Sainsbury	29/10/92	40 Hadleigh Road	IPSWICH	IP2 0BX	32,162

Fascia	Open date	Address	Town	Postcode	Sales Area (SQ FT)
J Sainsbury	05/11/92	Reeves Way	WHITSTABLE	CT5 3QS	28,998
J Sainsbury	10/11/92	Heron Gate	TAUNTON	TA1 2YQ	34,034
Tesco	17/11/92	McConnell Drive	MILTON KEYNES	MK12 5RJ	27,464
Tesco	01/12/92	Holmbush Farm	SHOREHAM BY SEA	BN43 6TD	54,400
Tesco	01/12/92	Glencoe Road	HAYES	UB5 9SN	42,373
Safeway	26/01/93	Oakley Road	CORBY	NN18 8LH	31,450
Safeway	02/02/93	Outland Road	PLYMOUTH	PL3 5UQ	27,700
Safeway	02/02/93	Chatsworth Road	CHESTERFIELD	S40 3BQ	27,900
J Sainsbury	04/02/93	Wetherby Road	HARROGATE	HG2 8QZ	34,012
Tesco	09/02/93	Princes Road	CHELMSFORD	CM2 9XW	28,524
Morrisons	09/02/93	Preston Grange	NORTH SHIELDS	NE29 9DU	41,429
Tesco	16/02/93	Glover Drive	UPPER EDMONTON	N18 3HF	44,868
Safeway	09/03/93	Treloggan Road	NEWQUAY	TR7 2JQ	25,000
Safeway	23/03/93	Stewartfield Way	EAST KILBRIDE	G74 4TT	31,250
Safeway	30/03/93	Llanelli Road	CARMARTHEN	SA31 2NF	31,250
J Sainsbury	06/05/93	London Road	HEMEL HEMPSTEAD	HP3 9QZ	36,046
Plymco Superstore	08/05/93	Brixham Road	PAIGNTON	TQ4 7BA	41,000
Morrisons	18/05/93	Dewsbury Road	WAKEFIELD	WF2 9BY	32,829
J Sainsbury	08/06/93	2-8 Luton Road	DUNSTABLE	LU5 4RF	34,454
Tesco	15/06/93	Mogden Lane	ISLEWORTH	TW7 7LL	45,755
Safeway	15/06/93	Dellers Wharf	TAUNTON	TA1 1DX	30,800
J Sainsbury	29/06/93	Thorne Road	DONCASTER	DN2 5PS	25,942
Morrisons	20/07/93	Whitchurch Road	SHREWSBURY	SY1 4DL	38,000
J Sainsbury	10/08/93	The Derwen	BRIDGEND	CF32 9ST	30,720
Morrisons	16/08/93	Plumpton Park	HARROGATE	HG2 7LD	38,000
Safeway	24/08/93	Buntsford Oak Road	BROMSGROVE	B60 3DX	31,100
J Sainsbury	09/07/93	1 Hill Barton Road	EXETER	EX1 3PF	32,226
Tesco	09/07/93	Barns Wallace Drive	WEYBRIDGE	KT13 0XF	49,057
Tesco	21/09/93	Fishbourne Road East	CHICESTER	PO19 3JT	40,484
J Sainsbury	28/09/93	3 Crown Road	ENFIELD	EN1 1TH	40,877
Safeway	05/10/93	Roman Way	MALVERN	WR14 1TZ	30,650
Safeway	11/10/93	Gyle Avenue	EDINBURGH	EH12 9JU	45,000
Tesco	12/10/93	Colletts Drive	CHELTENHAM	GL51 8JQ	37,013
Savacentre	19/10/93	Clapps Gate Lane	BECKTON	E6 4JF	65,497
Dales	31/10/93	Heron Retail Park	BASILDON	SS14 3AF	25,000
Safeway	02/11/93	Searby Road	LINCOLN	LN2 4DS	30,000
Morrisons	09/11/93	Morington Road	BOLTON	BL1 4EU	38,000
J Sainsbury	16/11/93	330 Fletchampstead Highway	COVENTRY	CV4 9BJ	31,903
Safeway	23/11/93	327 Southbury Road	ENFIELD	EN1 1TY	35,200
J Sainsbury	23/11/93	John MacAdam Way	ST. LEONARDS	TN37 7SQ	32,011
Tesco	23/11/93	Greenstead Road	COLCHESTER	CO1 2TE	43,973

Fascia	Open date	Address	Town	Postcode	Sales Area (SQ FT)
Safeway	23/11/93	Ashchurch Road	TEWKESBURY	GL20 8DP	25,000
Food Giant	30/11/93	The Peel Centre	BRADFORD	BD1 4RB	29,997
Tesco	07/12/93	Waterloo Road	POOLE	BH17 7EJ	34,817
J Sainsbury	07/12/93	Water Lane	FARNHAM	GU9 9NJ	35,809
Tesco	25/01/94	Tring Road	AYLESBURY	HP20 1PG	30,929
Tesco	01/02/94	Yaxham Road	DEREHAM	NR19 1HR	25,635
Tesco	01/02/94	Kingsmeadow	CIRENCESTER	GL7 1NP	36,342
Morrisons	07/02/94	Lakeside Parkway	SCUNTHORPE	DN16 3UA	38,000
Tesco	15/02/94	Courteney Road	GILLINGHAM	ME8 0GX	38,353
Safeway	21/02/94	Alcester Road	STRATFORD-UPON-AVON	CV37 9DA	29,700
J Sainsbury	22/02/94	Fairfield Park	BEDFORD	MK41 7PJ	32,000