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Telling the Story of a Street: Micro-Retail Change in Manchester from the 1960s

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Abstract

This paper investigates locational change in one street - King Street in Manchester, England – in an attempt to analyse broader retail trends and evaluate their implications. Analysis of Goad plans dating from the mid-1960s reveal King Street to be a microcosm of locational trends in retailing, such as the increasing prevalence of the multiple retailer in urban centres. Also highlighted is the micro-spatial impact of store (re-)location decisions within a city centre by retailers. A focus on such issues at the level of the individual street highlights the complex specificity and nuanced nature of such trends.

Introduction and research context

The importance of location to retailers is well attested¹ in particular, at the micro-scale, defined in terms of the appropriateness, or otherwise, of the precise location of a retailer within a particular locale², be it town/city centre, regional shopping centre, district centre etc. The aim of this paper is to investigate locational change in one street - King Street in Manchester, England – in an attempt to highlight and analyse broader retail trends and evaluate their implications. Our analysis is first contextualised through a description of the street in question. We then outline the information sources from which our analysis is derived, before presenting data on retail change in King Street from the 1960s. The paper concludes by identifying implications, and discussing potential avenues for further research.

King Street is a historically significant part of Manchester city centre, which came to prominence in the Industrial Revolution, when it became the banking centre of the English North West. In the 19th century major financial institutions were located there in notable buildings, many of which are now officially listed as being of architectural significance³. The eastern part of King Street in which this financial function has always been focused is called 'Upper King Street', and is currently part of a designated conservation area. Today there are a few retailers located here, but the land use in Upper King Street is still predominantly commercial. Bisecting the eastern and western parts of King Street is Cross Street, one of the main arterial roads in Manchester city centre.

¹ See Peter McGoldrick *Retail Marketing: 2nd edition* (Maidenhead: McGraw Hill, 2002), Chapter 7.

² Stephen Brown (1994). Retail location at the micro-scale: Inventory and prospect. *Service Industries Journal*, 14(4), 542-576.

³ Claire Hartwell *Manchester: Pevsner City Guide*. (London: Yale University Press, 2001).

The western part of King Street was well-established as a shopping street by the early 20th century, and (in reference to one of London's premier shopping streets) has been termed 'the Bond Street of the North', as it was characterised by upmarket/luxury retailers. Its western extent is bounded by Deansgate, another of Manchester's main arterial roads and retail foci. Our research focused on the western part of King Street, which has been pedestrianized for many years. During 2013, this area was the subject of much concern for the local authority and those individuals and institutions responsible for the management of the city centre, mainly due to the rising number of vacant retail units. This was manifest in local news media coverage, with sensationalist headlines in the local press, such as '*Crisis in shopping mecca King Street as jewel in shops crown loses its shine*'⁴. Such concerns emphasise that King Street is considered a bellwether indicator of the health and wealth of Manchester's retail provision. This is especially so because of the upmarket/luxury – and arguably 'iconic' – nature of the retailers located therein. Indeed, over recent years King Street has been frequently highlighted in promotional materials for the marketing of Manchester as a shopping destination.

The above cited newspaper article provided the impetus for this research project. We therefore sought to investigate the perceived 'fall from grace' of King Street, particularly as a retail destination. To begin this process, we obtained and consulted Goad plans of King Street from 1967, and at approximately five-year intervals thereafter, subject to map availability (i.e. 1973, 1977, 1983, 1988, 1993, 1998, 2003, 2008). Goad plans are named after Charles E. Goad who first produced these detailed street maps in 1885, providing information on the use(s) of individual buildings. They were initially made for the purposes of fire insurance assessment. However, since 1967 Goad (now part of Experian) have created plans of urban shopping provision in UK towns and cities⁵. The plans give a bird's eye view of a retail centre, showing retail fascia name, product/service category, spatial footprint and exact location of all retail outlets/vacant premises. For our purposes, Goad plans gave a 'snapshot' picture of retail provision in King Street at various times. We established an even more recent overview of retail activity on the street by taking our own censuses of the occupancy and sectoral affiliation of retail premises there in 2013 and 2017.

⁴ Charlotte Cox (2013) Crisis at shopping mecca King Street as jewel in shops crown loses its shine. *Manchester Evening News* 1 April, 2013. Retrieved from <http://www.manchestereveningnews.co.uk/news/greater-manchester-news/crisis-shopping-mecca-king-street-2492039> (Last accessed: November 5, 2014).

⁵ See Gwyn Rowley and Peter McL. Shepherd (1976) A source of elementary spatial data for town centre research in Britain, *Area* 8(3), 201-208.

Using these data sources we identified changes in occupancy of each retail premises in the street over the 50 year period from 1967 to 2017. This analysis was supplemented by: (i) an archival search and subsequent content analysis of local newspaper sources to determine local media narratives relating to King Street; and (ii) semi-structured key informant interviews with representatives of organisations responsible for management of the area of Manchester within which King Street is located (i.e. the City Centre Management company), and also property agents responsible for letting vacant outlets on King Street. These interviews explored perceptions of factors influencing the current and (where appropriate) historical state of retailing in the street, and the implications of this for managing the street as a specific locale, informed by concepts relating to town/city centre management⁶.

Changing retail provision

The nature of retail activity within King Street is of interest in terms of its market positioning as a high-end retail destination. Table 1 shows changes in this retail activity, in terms of the number of outlets and their product sector, for the period studied.

Table 1 Number of Retail Outlets by Product Type in King Street 1967-2017

Product Type	1967	1973	1977	1983	1988	1993	1998	2003	2008	2013	2017
Fashion	6	7	7	9	19	21	23	20	20	17	14
Footwear	6	5	4	2	2	2	3	3	2	1	1
Watches/ Jewellery	4	5	4	5	4	4	4	5	5	5	5
Financial Services	5	5	2	3	3	3	1	1	-	-	-
Employment Agency	1	1	1	1	1	1	1	1	1	-	-
Department Store	1	1	1	-	-	-	-	-	-	-	-
Kitchenware	1	-	-	1	1	-	1	1	2	1	-
Furs	4	5	5	5	3	-	-	-	-	-	-
Furniture	1	1	1	-	-	-	-	-	-	-	1
Opticians	2	2	2	2	2	-	-	-	-	-	-

⁶ See Gary Warnaby, Andrew Alexander and Dominic Medway (1998) Town centre management in the UK: Review, synthesis and research agenda. *International Review of Retail, Distribution and Consumer Research*, 8(1), 15-31.

Food/ Cafe	2	2	2	2	2	1	1	3	-	1	2
Photography	1	1	1	1	1	1	-	-	-	-	-
Office/ Commercial	-	1	1	-	-	-	-	-	-	-	-
Hairdressing	-	1	1	1	1	1	1	-	-	-	-
Philately	-	1	1	-	-	-	-	-	-	-	-
Art	-	-	1	-	1	1	-	-	-	1	2
Interior Design	-	-	1	-	-	-	-	-	-	-	-
China	-	-	1	-	-	-	-	-	-	-	-
Electrical Goods	-	-	-	1	-	-	-	-	-	-	-
Books	-	-	-	1	-	-	-	-	-	-	-
Florist	-	-	-	-	1	-	-	-	-	-	-
Stationery	-	-	-	-	-	1	1	1	1	1	1
Health & Beauty	-	-	-	-	-	-	1	1	2	2	5
Music/Phones	-	-	-	-	-	-	-	1	-	-	-
Pharmacy	-	-	-	-	-	-	-	-	1	1	1
Soft Furnishings	-	-	-	-	-	-	-	-	1	2	2
Travel Agent	-	-	-	-	-	-	-	-	-	1	1
Vacant	-	-	3	6	2	3	2	4	7	7	6
Unknown [#]	5	3	2	2	-	-	-	-	-	-	-
TOTAL*	39	41	41	42	43	40	39	41	42	40	41

[#]Text illegible on handwritten Goad plans

*Number of outlets varies because of division/amalgamation of premises over time.

Consistent with the 'Bond Street of the North' epithet, King Street is characterised by upscale/luxury retailing. However, it is also evident that over the years there has been a gradual shift from a more heterogeneous provision, where independent or small multiple upscale retailers are more prevalent, to a domination by the outlets of major retail fashion brands, which are typically characterised by multiple store networks with national or international coverage. Thus, the number of fashion retailers on King Street increased from seven through the 1960s and 1970s, when all but two – Jaeger and Liberty –were independent outlets, to a peak of 23 in 1998, when all but one were recognised national/international multiple operators. Whilst the overall number of fashion retailers has reduced in more recent years, multiple retailers still predominate in the street's current retail mix (14 outlets in 2017).

Interview data indicated that this trend toward occupancy by multiple retailers was a result of the high costs of locating within King Street in terms of rental levels and business rates.

However, in recent years, store network location/management decisions by some of the street's more upmarket/luxury fashion outlets (e.g. retailers such as Hermès, Mulberry etc.), as well as those of more mainstream fashion brands (e.g. Timberland, Monsoon, Tommy Hilfiger etc.), have resulted in rationalisation and relocation of stores within the city. Thus, such retailers have relocated from King Street to a range of other locations. These include 'off-centre' developments such as the intu Trafford Centre (a regional shopping centre within the Greater Manchester conurbation), which has seemingly become a favoured location for upmarket retail stores. Relocations from King Street have also been to other parts of Manchester city centre itself, including moves to the upgraded Manchester Arndale in-town shopping centre, and new developments deliberately positioned as upmarket retail destinations (e.g. New Cathedral Street, and The Avenue in the nearby Spinningfields mixed-use commercial development). In addition, many of the upmarket fashion retailers previously represented in King Street in stand-alone premises now only have a physical presence in the city through concessions in department stores. These include the 21st century developments of Harvey Nichols and Selfridges department stores in New Cathedral Street, as well as the long-established Kendals on Deansgate (part of the House of Fraser store group). This increased spatial competition in the city centre has inevitably diluted King Street's retail lustre.

As the importance of fashion retailers in King Street grew from the late 1980s onwards, there has been a concomitant decline in other types of retail activity, partly arising from changes in consumer attitudes to certain product categories. For example, five fur shops present in 1967 had all disappeared by 1993; clearly a reflection of changing social attitudes to the wearing of fur, particularly from the onset of the 1980s. Conversely, other types of retailing have maintained a constant presence over the years, a good example being watch/jewellery outlets; which may be a manifestation of retail agglomeration tendencies⁷ (Brown, 1994). Indeed, interview data from key informants indicated that concentrating watch/jewellery retailing in this locale has been proposed as a possible means of improving its shopping 'draw' into the future.

Two other product categories are worthy of comment. The number of financial services outlets (i.e. bank and building society branches) declined from five in 1967 to only one in 2003, and none thereafter. This is undoubtedly a reflection of the consolidation of

⁷ See Stephen Brown (1994). Retail location at the micro-scale: Inventory and prospect. *Service Industries Journal*, 14(4), 542-576.

bank/building society branch networks more broadly, with fewer, bigger outlets located on major shopping streets increasingly becoming the norm in the 21st century. More recently, there has been an expansion in the number of retailers selling health and beauty products. For many years, there was only one such retailer - The Body Shop at 24-26 King Street. This retailer appeared in the 2008 Goad plan and was still operating at the time of writing. From 2008 another health and beauty retailer (L'Occitane en Provence) appeared, and between our 2013 and 2017 censuses another three such retailers (all multiples) opened for business. This perhaps reflects the growth of this product sector more generally.

Virtually throughout the period of study there have been one or two cafés/restaurants in King Street. In the aftermath of the concerns of 2013 (when King Street was, according to the local press, the subject of a '*crunch meeting at the town hall to discuss the issues*'⁸), increasing the number of food and drink outlets was seen as a means of increasing footfall and improving the street's competitive position. Such approaches to managing the King Street's retail mix were repeatedly mentioned by our key informants in interviews. However, it was also identified that efforts to achieve this are hampered by fragmented property ownership and a lack of collective action.

Retail vacancy levels

Another key aspect of changing retail provision is vacancy levels, which as mentioned above, have risen in recent years to the extent that King Street is perceived to be in 'crisis'. The perceptual impact of empty space is highlighted in numerous media articles which picture street views highlighting a plethora of 'Lease for Sale'/'To Let' boards, not only for retail units, but also for vacant commercial space in the upper stories of shop premises. This adds a visual indicator of perceived decline. Indeed, Cox's newspaper article mentioned above notes one manager of a retail outlet located on King Street as saying, "*The street needs a facelift to return it to its former glory or I don't know what will happen*"⁹. Highlighting that such press narratives are not new, Schofield noted in 2009 that moving along King Street: "*The walk from Deansgate to Cross Street starts badly with both corner units empty and then gets worse*

⁸ Charlotte Cox (2013) Crisis at shopping mecca King Street as jewel in shops crown loses its shine. *Manchester Evening News* 1 April, 2013. Retrieved from <http://www.manchestereveningnews.co.uk/news/greater-manchester-news/crisis-shopping-mecca-king-street-2492039> (Last accessed: November 5, 2014).

⁹ Charlotte Cox (2013) Crisis at shopping mecca King Street as jewel in shops crown loses its shine. *Manchester Evening News* 1 April, 2013. Retrieved from <http://www.manchestereveningnews.co.uk/news/greater-manchester-news/crisis-shopping-mecca-king-street-2492039> (Last accessed: November 5, 2014), 2.

as you progress. Looking into the empty units you see shutters half pulled down, mouldering piles of letters and the dust slowly settling". He concludes by suggesting that empty retail units "*are like a virus that quickly spreads*", and states, "*It seems King Street may be a gap-toothed beauty for a while yet*"¹⁰.

Notwithstanding King Street's perceived premier retail positioning, retail location decision-making at broader spatial scales may have an obvious impact on the occupancy of retail units on the street. Space constraints preclude detailed discussion of each retail outlet, but our analysis indicates two conflicting tendencies: one towards stasis and the same retailer occupying a site for many years or even decades (e.g. fashion retailer Jaeger occupied 15 King Street from before the inception of our analysis until early 2015), and another towards retailer 'churn', with serial occupancy of the same premises by various retailers over the study period.

Indeed, retailer churn is a significant issue, motivated by various factors. On the one hand there is the apparent draw of new retail destinations within Manchester, especially when potential current tenants (such as those located in King Street) are, according to one of our key informants, given inducements by developers to move into these. On the other hand, some recent departures from King Street are a result of the complete national closure of retail fascias (e.g. Aubin & Wills). Additionally, there are issues of retailers rationalising their store presence within the city. In this respect, a key informant also noted that if retailers had more than one store in the city, they were often making a decision to close down their least viable outlet(s). This would often be the King Street store, which might be less profitable (or indeed loss-making) due to unfavourable rental terms and business rates on premises – a partial consequence of the street's retail space being often sited in historic buildings which are not configured in an optimum manner for modern retail provision. There was, in turn, an acknowledgment among our key informants that potential tenants had to be incentivised to locate in King Street, and a realisation that if the image of the street was to be maintained, then such activity needed to be selective. It is obvious that the high level of current vacancies made the task of persuading retailers to locate in King Street harder, and more positive narratives about the street needed to be developed.

¹⁰ Jonathan Schofield The death of King Street. *Manchester Confidential*. 2 November 2009. Retrieved from <http://www.manchesterconfidential.co.uk/News/The-Death-of-King-Street> (Last accessed November 5, 2014).

Discussion

Our analysis of retail provision in King Street from the mid-1960s to the present indicates that it could be seen as representing a microcosm of broader trends in retailing generally and retail location specifically, echoing Hankins' view that the study of an individual street "*may be approached in terms of retail capital and retail spatiality*"¹¹. Consideration of such issues at this very narrow spatial scale highlights the complex specificity and nuanced nature of retail location decisions, and the implications of this for retail provision within the wider locale. Our study also highlights the agency of those responsible for urban management in influencing the nature of retail location decisions. This agency is manifest in attempts to manage the retail mix (insofar as this is possible with fragmented property ownership), which in this case has resulted in attempts to build agglomerations of particular retailer types through the incentivisation of appropriate retail inward investors (e.g. according to our key informants, through direct financial incentives, and through lobbying to reduce business rates). Such initiatives are consistent with principles underpinning town centre management (TCM), particularly in terms of gaining some control and governance over physical and built fabric of a locale. The first TCM schemes appeared in the UK in the late 1980s and the concept expanded rapidly through the 1990s, although it has more recently been superseded by Business Improvement Districts. Manchester, as befitting its position in the UK retail hierarchy, has had well-established TCM operations in place for many years, most recently under the aegis of an organisation called CityCo (www.cityco.com). TCM schemes often play a major role in the marketing of retail destinations¹² (Warnaby *et al.*, 2005). In this specific context, the development over time of media narratives about the street to try to influence perceptions of both shoppers and the retailers located (or considering locating) therein may also be important.

This focus on the level of the individual street raises a number of interesting issues. The very narrow spatial scale allows for more detailed probing of motives for micro-scale retail location decisions, which could also inform any consideration of retail change within a locale, through the lens of the different theories of retail change¹³ (see Brown, 1997, for an

¹¹ Katherine Hankins (2002). The restructuring of retail capital and the street. *Tijdschrift voor Economische en Social Geografie*, 93(1), 34-46. p.44

¹² Gary Warnaby, David Bennison and Barry J. Davies (2005). Marketing Town Centres: Retailing and Town Centre Management. *Local Economy*, 20(4), 183-204.

¹³ See Stephen Brown (1987). Institutional change in retailing: a review and synthesis. *European Journal of Marketing*, 21(6), 5-36.

extensive review). For example, given the retailer ‘churn’ mentioned above, where the retailers in the Goad plans of King Street came from, and went to on leaving the street, could provide insights into the broader longitudinal locational trends of retailing within Manchester and the surrounding region. In addition, one could also narrow the spatial scale of analysis even further to individual premises and their occupancy over time, and the role of individual buildings in influencing perceptions of the street in which they are located, thereby considering the role and influence of retail activity in spatial production from an ‘ultra-micro’ perspective.

Accepted version