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Reconfiguration and economic performance of British retail centres in the post-pandemic era

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ABSTRACT

The UK retail landscape has undergone a profound change in past decades with popular debates largely focusing on decline of the traditional retail spaces. This, predominantly driven by technological advancement and corresponding changes in consumer behaviour, was exacerbated by the Covid-19 pandemic and the subsequent disruption to supply chains and cost of living crisis. This study provides a comprehensive, data-driven descriptive analysis and new evidence on the transformation and economic performance of British retail centres over the *five-year pre- and post-pandemic period* (2019–2023), which is a crucial period offering a valuable perspective within three different periods: pre-pandemic, the Covid-19 pandemic and the initial post-pandemic 'recovery'. Using longitudinal retailer occupancy data, this study presents a picture of the British retail landscape that is far from uniform, and shows that the decline was predominantly driven by ongoing trends of digitalisation within retailing and services and exacerbated by the temporary closure of 'non-essential' shops during the pandemic. Our findings also provide empirical evidence that Covid-19, when combined with pre-existing trends, prompted further demise of many 'traditional' retailers on high streets, evidenced by increasing vacancies. On the contrary and importantly, we find several trends which are facilitating reorientation and growth in the traditional retail centres and have emerged in the past five years. These changes are conceptualised within existing frameworks of retail resilience to economic shocks in particular retail centres economic cycle and their evolutionary trajectories. The new evidence can be used to substantiate the wider debates on the economic performance of British retail centres and their regeneration in the 'new retail' post Covid-19 era.

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Introduction

The UK retail landscape has been changing rapidly in recent decades, with wider debates increasingly focusing on the decline of traditional retailing. This has been largely driven by technological advancements (i.e. digitalisation) and corresponding changes in consumer purchasing behaviour (Hagberg, Sundström, and Egels-Zandén 2016), resulting in diminished demand for physical retail spaces (Hughes and Jackson 2015). Research shows that

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failure to integrate these new technologies increases competitive pressures and vulnerability (Orr et al. 2023) and can lead to an accelerated decline of the traditional retail centres (Lashgari and Shahab 2022). The configuration of traditional retail centres in the UK, U.S. and other western economies was already fragile in the pre-pandemic period due to changing consumer shopping preferences and the rapid increase of online retailing competition, as exemplified by declining footfall and widespread shop closures (Dolega and Lord 2020; Evans and Mathur 2014; Hill and Cheshire 2023). However, these trends have become especially evident in the past five years, with the Covid-19 pandemic and subsequent global disruptions to supply chains and the cost-of-living crisis exacerbating ongoing changes and sparking wider debate about the role and purpose of traditional retail spaces (e.g. Frago 2021; Lashgari and Shahab 2022).

During the pandemic, in-person shopping was associated with a higher risk of infection given prevailing configuration and lack of ventilation in many retail spaces. As such, 'non-essential' retailers were mandated to close their stores during lockdown, which adversely impacted many traditional retailers and pushed online sales to record high levels (House of Commons 2024). Additional challenges for stores that were open included the impact of social distancing, and an overall reduced footfall given restrictions on tourists and working populations (Trasberg and Cheshire 2023). There is some evidence that pandemic exacerbated the deterioration of many already struggling physical retail centres (e.g. Hill and Cheshire 2023; Frago 2021). In particular, the issue of rising and persistent vacancy rates has become a key concern for town centre managers and policymakers. This phenomenon varies across spatial and temporal scales (Dolega and Lord 2020; Che, Seung, and Kim 2023), however the magnitude, trajectories and the underlying contributors to shop closures remain underexplored. Furthermore, the extent to which these locations have recovered in the initial post-pandemic period, hindered by stagnation in overall UK sales (ONS 2024), persistently low levels of consumer confidence, and external factors such as the cost-of-living crisis, remains less understood.

Understanding how the UK retail landscape has adapted to and reconfigured since the Covid-19 pandemic, particularly regarding the acceleration or alteration of pre-existing trends such as digitalisation of retailing, is essential, as this remains a dynamic and evolving picture. Besides, a significant research gap exists concerning the resilience of retail systems, particularly in understanding how their evolving structures and ongoing reconfiguration influence adaptive capacity and likely future trajectories. These gaps highlight the need for new and robust empirical evidence on how COVID-19 transformed traditional retail spaces and their adaptation during the pandemic and the initial post-pandemic recovery period. Such evidence is essential for guiding policymakers in formulation of more targeted and effective strategies for how UK retail and consumption spaces respond to shocks and transform their uses to respond to shocks and align with changing post-pandemic demands. However, somewhat unexpectedly, higher-order empirical evidence in this area remains limited. Although some insights are available, they either use proxy datasets to explore changing performance (e.g. Ballantyne, Singleton, and Dolega 2022; Trasberg and Cheshire 2023), or those generated by commercial research consultancies, often lack academic rigor and can be difficult to replicate (Dolega et al. 2021). This study aims to address this research gap by providing comprehensive national empirical insights at various spatial levels on how the British retail landscape has transformed over the five-

year pre- and post-pandemic period (2019–2023) and attempting to conceptualise these changes. In particular, we use a longitudinal retail occupancy dataset to examine the dynamics of the evolving economic performance of traditional UK retail and consumption spaces, viewed as a network across different spatial scales. This includes their response to and initial recovery from the Covid-19 pandemic and the extent to which their form and function (i.e. configuration) has changed during this time. We conceptualise such changes by positioning them within existing frameworks of retail resilience to economic shocks (e.g. Dolega and Celińska-Janowicz 2015; Wrigley and Dolega 2011). More specifically, this paper will address the following research questions:

(1) *How has the UK retail landscape changed over the five-year pre- and post-pandemic period (2019-2023)?*
(2) *What was the response of UK retail centres to the shock of the Covid-19 pandemic and how did they emerge from the pandemic?*
(3) *What are the initial post-pandemic trajectories of UK retail centres, as measured by their economic performance across various spatial levels?*

The paper proceeds in the following way. First, it outlines the research background providing wider context on the transformation of UK retail landscape and the relevant theoretical frameworks linked to resilience of retail centres. Next, the methodological approach is outlined, which includes description of the datasets and measures used. Section four presents the results organised around the three research questions focussing on the changes in the UK retail landscape over the past five years, the nature of the post-pandemic recovery and examination of vacancy rates at different spatial scales. In section five we discuss the implications of our findings, positioning them within wider debates and relevant theoretical frameworks, and provide the conclusions.

Research background

Transformation of the UK retail landscape and decline of traditional retail spaces

The decline of traditional retail and consumption spaces began well before the Covid-19 pandemic and is part of a broader transformation of the retail landscape in the UK and other Western economies (Lashgari and Shahab 2022; Wrigley et al. 2015). Numerous studies have examined the impact of various shocks on the retail systems in the UK and beyond (e.g. Che, Seung, and Kim 2023; Wrigley and Dolega 2011). In the second half of the 20th century, the long-term impact of corporate retail chain expansion, car-borne shoppers and 'Town Centre First' retail planning regulations on traditional high streets was given much attention in the UK and changing spatial pattern of retailing (AbedRabbo et al. 2022; Guy 2007). The shock of the 2008–09 economic crisis and its aftermath were marked by widespread shop closures, with numerous iconic British retailers such as Woolworths declaring insolvency (Genecon 2011). This period triggered a wider debate on the future of traditional retail spaces, with British media focusing on 'ghost towns' and the 'death' of high streets, while academic discourse centred on preserving the vitality of

retail centres through reconfiguration and renewal, linking to adaptive resilience (Wrigley and Dolega 2011) and economic cycle frameworks (Dolega and Celińska-Janowicz 2015).

In the late 2000s, the evolution of UK high streets was primarily driven by a shift in consumer purchasing behaviour, with an increasing emphasis on convenience, online shopping and value, as identified by Wrigley et al. (2015). This was exacerbated by the 2008–09 economic crisis, which coupled with the widespread adoption of smartphones and tablets, has resulted in significant and sustained growth in e-commerce and a shift towards omnichannel retailing, attracting new waves of customers and altering the way goods and services are sold and bought (AbedRabbo et al. 2022; Hughes and Jackson 2015; Ntounis et al. 2023). Although traditional shopping methods have increasingly been replaced with digital retailing (Hagberg, Sundström, and Egels-Zandén 2016; Singleton et al. 2016; Weltevreden and van Rietbergen 2007), this shift has also incentivized retailers and service providers to innovate. They have offered more personalized shopping experiences (Grewal, Roggeveen, and Nordfält 2017), introduced facilities such as click & collect (Jones and Livingstone 2018), developed various digital platforms, and focused on digital marketing (Dolega, Rowe, and Branagan 2021). Alongside these innovations, retail transformation has also been influenced by changing demographics (Carmona 2022; Singleton et al. 2016) and the Covid-19 induced shift towards more hybrid working and associated movement patterns (Centre for Cities 2021; Gibbs et al. 2024), challenging the long-established spatial and hierarchical structure of retail centres (Enoch et al. 2021). This had a profound impact on retail centres that largely relied on shopping tourism and workplace populations, such as the City of London (Gibbs et al. 2024; Hill and Cheshire 2023). The older generation have also increasingly adopted and developed trust in various online shopping platforms (Kovalenko 2021), while millennials and generation-Z, whose shopping behaviours are increasingly shaped by social media trends and digital marketing, make up a growing share of the consumer base (Dolega, Rowe, and Branagan 2021). Consequently, continuous growth in online sales, hybrid and 'experiential' retailing (Reimers and Clulow 2009; Toulan and Pisani 2020), and the pressure to meet the needs of the 'modern' consumer have gradually transformed the retail landscapes of the UK and other Western economies.

The Covid-19 pandemic had a short-term, but profound direct impact on consumer behaviour and the demand for traditional retail and consumption spaces. Emerging evidence suggests also certain sustained implications, with the pandemic exacerbating existing challenges and posing new threats to British retail centres (Ballantyne, Singleton, and Dolega 2022; Enoch et al. 2021; Lashgari and Shahab 2022). Government-mandated closures of 'non-essential' retailing and services resulted in the compelled replacement of physical shopping trips with online sales, which increased rapidly to almost 40% of total sales by April 2020, doubling pre-pandemic levels (House of Commons 2024). As a result, there was a wave of insolvencies and shop closures, particularly among small retailers around city centres and those failing to adopt digital technologies (Carmona 2022). The pandemic's aftermath disproportionately affected 'non-essential' retailers, with various large retail chains like Kath Kidston, Debenhams, Wilko, and Body Shop disappearing from UK high streets. In 2020 alone, 17,500 stores closed while only 7,600 opened (The Guardian 2021). This trend also affected amenities and service providers such as bank branches and pharmacies, disproportionately impacting those with disabilities, those living in rural areas, and older people (House of Lords Library 2024).

During the latter phase of the pandemic, the debate focused on recovery and the 'new era' of retail. This can be exemplified by online sales, which in the UK receded to about 27% post-pandemic, however this was still substantially higher than the pre-pandemic figure of 19% (ONS 2024). During the initial recovery phase, the cost-of-living crisis further eroded consumer confidence and disposable income (Frances-Devine et al. 2024). Although the 'new era' of retail in the post-pandemic era continues to evolve, driven by digitalization of retailing and services and changing in consumer behaviour and additional trends, such as declining disposable income and hybrid work environments (Gibbs et al. 2024), also shape its development. A growing body of research has investigated the impact of the Covid-19 pandemic on consumer behaviour (e.g. Cruz-Cárdenas et al. 2021; Dolega and Celińska-Janowicz, 2015), however, traditional retail spaces have received limited attention, particularly concerning their performance and transformations in form and function. Research has explored the changing levels of 'footfall' and key drivers of greater or lesser recovery (Enoch et al. 2021; Trasberg and Cheshire 2023), but this empirical evidence is often based on proxy datasets (e.g. mobile applications, footfall), which have significant limitations (Ballantyne, Singleton, and Dolega 2022; Gibbs et al. 2024). Therefore, there is a need for new empirical and data-driven evidence to examine changes in shifting retail trends including retail centre composition and vacancies at various spatial levels, providing new insights into the ongoing processes shaping the British retail landscape.

Conceptual frameworks of retail systems performance and resilience

To understand the future trajectories of consumption spaces, it is essential to contextualise the nature of these changes within relevant theoretical frameworks. There are a number of frameworks that are useful to better understand the ongoing changes of the UK retail landscape including the exploratory framework of digitalisation of retailing by Hagberg, Sundström, and Egels-Zandén (2016), or conceptual framework of retail locational obsolescence by Hughes and Jackson (2015). However, the focus of this study is developing more nuanced understanding of how UK retail centres can remain economically viable through the adoption of new strategies based on reinvention and adaptation to the new era of digital retailing. In line with Ntounis et al. (2023), who reviewed the interrelated concepts of retail centre resilience, adaptability and sustainability, in this context, two interlinked conceptual frameworks appear pertinent to this study, offering a valuable interpretation of the nature of retail centre reconfiguration and potential future evolutionary trajectories.

First, the concept of '*adaptive resilience*', developed by Wrigley and Dolega (2011), in which drawing from Martin's (2012) conceptualisation of regional resilience, retail centres are viewed as dynamic and evolutionary complex systems that can reorganise themselves through the '*anticipatory or reactive capacity to minimise the impacts of a destabilising shock*' (Wrigley and Dolega, 2338). Although, the framework offers a clear potential, Ntounis et al. (2023) highlighted some ambiguities in the notion of resilience and adaptability, which could pose certain limitations, and Dobson (2015) argued that the constant transition and evolution of retail centres, emphasising a shift from one state to a new one, may offer better explanation of the ongoing changes in the UK retail landscape. Thus, a second framework, developed by Dolega and Celińska-Janowicz (2015) resonates with

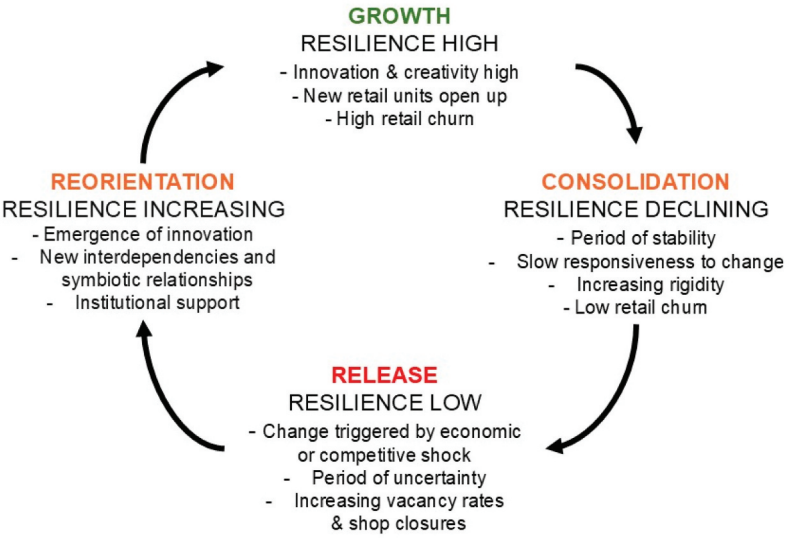

Figure 1. Adaptive cycle of retail centres from Dolega and Celińska-Janowicz (2015, p. 21).

this view and links the constant transformation, economic performance, and resilience of retail centres to their position within the economic cycle. In this theoretical framework, the authors demonstrate that this cycle comprises four development stages: *growth*, *consolidation*, *release*, and *reorientation* as shown in Figure 1. This framework has proven a useful tool supporting previous research to identify and explain changing vacancies, floorspace and diversity in major UK regional centres (Orr et al. 2023), prompting further use across a national system of retail centres spanning the entire retail centre hierarchy, and in the context of the Covid-19 pandemic and subsequent post pandemic recovery.

Following the *growth* stage, where resilience is at its peak, retail centres reach economic maturity and enter the *consolidation* stage, characterised by stability and gradually declining resilience. Over time, the configuration of retail centres becomes more rigid as often due to the associated cost and decreased innovation, there is diminished willingness to introduce changes and the response to market changes may be slow. Then, they suggested an unexpected shock – such as the Covid-19 pandemic - has the capacity to change retail centres' economic trajectories and push them beyond their 'pre-shock' equilibrium into *release* and *reorientation* stages. In these stages, the 'Schumpeterian' creative destruction (Schumpeter 1942) of the pandemic can sweep away less competitive and outdated configurations, creating a way for new opportunities. The *reorientation* stage is highly innovative and enables retail centres to enter a new growth phase. Although both these frameworks were developed in response to the adjustment of UK retail centres to the 2008–09 economic crisis, their relevance and applicability within the context of the recent the Covid-19 pandemic and the post-pandemic recovery seems rational and suitable.

Deriving new data-driven insights on shifting retail trends at various spatial levels and contextualising them within these theoretical frameworks (as in Orr et al. 2023), can enhance understanding of how consumption spaces respond to shocks, emerge from them, and reorganise or adapt alternative functions in the 'new era' of retailing. More

specifically, understanding the transformation of UK retail centres—such as which types of retailers decreased or increased their presence, emerging trends, and shifts in retail system resilience and fragility across spatial scales—is crucial not only for their economic success but also for policy design and potential interventions. Nevertheless, the adaptive cycle framework has certain limitations that must be considered. Firstly, retail systems can be analysed across various spatial scales, including national, regional, district, and individual retail centre levels. The adaptive capacity and resilience of a retail system, viewed as its ability to adapt and respond to changes in use, will differ when examining a network of retail centres compared to an individual centre. Second, the progression through the phases of the adaptive cycle is not always as linear as the framework suggests. In some cases, retail systems situated in economically stronger regions may perform better than those in weaker regions or districts, where individual centres may stagnate (fail to move on to the reorientation or growth phase). This behaviour indicates that the adaptive cycle may not necessarily operate as a 'closed loop'. While this is less likely for higher-order systems, such as regional or semi-regional networks of retail centres, individual centres may even 'exit' their retail functions.

Methodological approach

Data and study design

To systematically evaluate the transformation of UK retail centres between 2019 and 2013, we adopted an approach that is exploratory and descriptive in nature. This involved analysing the changing configuration and economic performance of UK retail centres at various spatial scales over a five-year span, encompassing the pre-pandemic, within-pandemic, and initial post-pandemic recovery periods. We employed a longitudinal retailer occupancy data from the Local Data Company (LDC), provided by the Consumer Data Research Centre (CDRC). This dataset has proven to be one of the most comprehensive occupancy datasets that is openly available in the UK and has been utilised by similar studies (e.g. Ballantyne, Singleton, and Dolega 2022; Dolega et al. 2021; Hill and Cheshire 2023). LDC is a commercial consultancy that conducts extensive surveys to collect data on UK retail centres on a continuous basis, focusing on individual retail units. The data captures a broad range of characteristics of each store, including unique IDs, store/business name, category (and subcategory) information, address, location and importantly vacant units. The LDC data is collected annually, so for this study we employed the most recent five years of data covering the 2019 – 2023 period. A key limitation of these data is no measurement of unit size, meaning analyses based on unit counts may yield unreliable estimates of proportional changes at the individual retail centre level. In this study, however, we use aggregated data at scales larger than individual centres. The raw data was then cleaned to remove units in the 'Non-Retail' category (e.g. car parks, car wash, ferry terminals) which accounted for approx. 0.6% of all surveyed units, before identifying only those units which fall within an official retail centre boundary. The latter utilises the CDRC UK retail centre boundaries derived by Macdonald, Dolega, and Singleton (2022), which delineate the primary sites of retail and consumption across Great Britain. We were left with a sample of units (approx. 370,000) for 2019, which exist within 4,811 official retail centre boundaries. Approximately 1,500 small retail centres

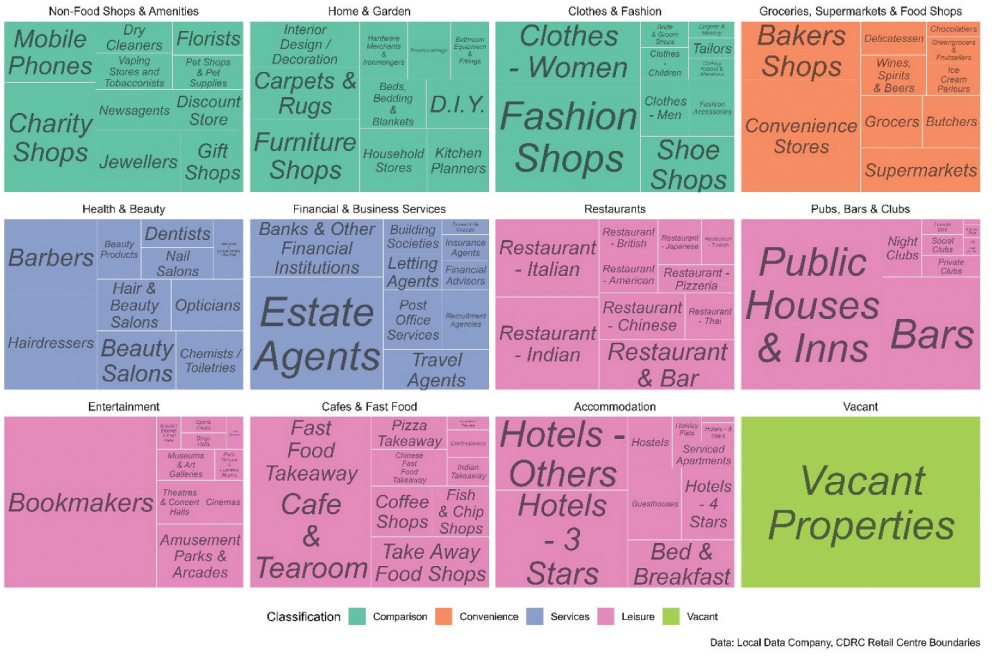

Figure 2. Treemap of LDC occupancy data showing retail categories (panels) and subcategories (sub-panels and labels), with text size representing each category's share of units.

were excluded from the analysis due to low unit counts (fewer than 40), as these tend to produce high and unstable values and introduce potential bias.

All LDC units were classified into a high-level categorisation used in retail planning and by various government bodies (i.e. comparison retail, convenience retail, services, leisure), referred to as 'Classification', which maps directly onto the more detailed categories (12 in total) and subcategories (333 in total) assigned to units by LDC. Figure 2 displays an overview of the relationship between LDC categories and subcategories, and their interactions with this high-level categorisation (i.e. 'Classification).

Methodological approach

To examine the changing dominance of specific categories of retail, we first examined the national-level picture of the retail landscape for 2019 as a baseline. This was calculated by extracting the total percentage of units (nationally) occupied by each distinct category in the LDC dataset. Figure 3 displays an overview of this national-level picture, where it is clear that in 2019 'Non-Food Shops & Amenities' (e.g., charity shops, jewellers) and 'Health & Beauty' (e.g. barbers, beauty salons) occupied the greatest share of units. Furthermore, vacant units were seen to occupy 10.6% of total units in 2019.

To examine the changing composition of retail centres, we calculated how the share of units in each of these categories changed between 2019 and 2023, at the national level, and splitting into two periods: i) between pre-pandemic and within-pandemic (2019 – 2021) and between within-pandemic and post-pandemic (2021 – 2023). Further, to measure the economic performance of retail centres and how it has

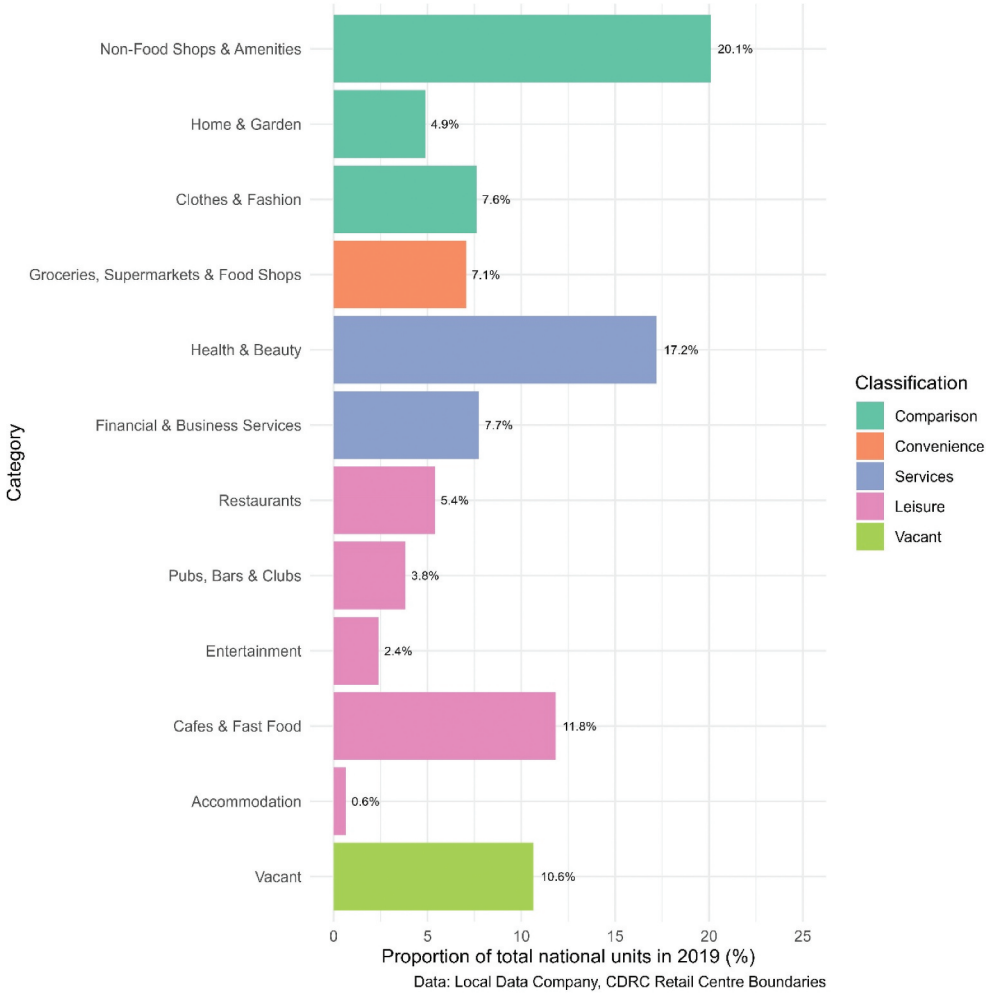

Figure 3. Composition of UK retail centres in the pre-pandemic period by broad category.

changed over time (see Section 3.4), we calculated vacancy rates and vacancy rate change for the analysed periods across three spatial levels: national, regional and district (local authority). The change was computed as the difference in occupancy rates for a specific category recorded in two specified survey periods (e.g. pre-pandemic and within-pandemic), relative to the pre-pandemic numbers as a base. To further investigate the retail types contributing to the vacancy rate and its change across the four stages of the adaptive cycle (as illustrated in Figure 1), we calculated the difference in occupancy rates for each retail and service category between 2019 and 2023, separately for each stage.

Equation 1 illustrates how these changes in composition and vacancy rate were calculated between different periods, and different spatial scales. To explore the changing economic performance of different types of retail centres (e.g., regional centres vs retail parks), we also calculated the average vacancy rates across the retail hierarchy, before calculating the change in vacancy rate between different periods.

$$\Delta V_{i,j\ldots k} = \left[\frac{V_{i,k} - V_{i,j}}{V_{i,j}}\right] \times 100 \quad (1)$$

$\Delta V_{i,j\ldots k}$ - Change in occupancy or vacancy rate at spatial scale *i* (e.g. national) between periods *j* (e.g. 2019) and *k* (e.g. 2023).

$V_{i,k}$ – Occupancy or vacancy rate at spatial scale *i* (e.g. national) in period 2 (e.g. 2023).

$V_{i,j}$ – Occupancy or vacancy rate at spatial scale *i* (e.g. national) in period 1 (e.g. 2019).

Results

Transformation of UK retail centres between 2019 and 2023

The transformation of the UK retail landscape between the pre- and post-pandemic period shows a picture that is far from uniform. Although the total number of vacant

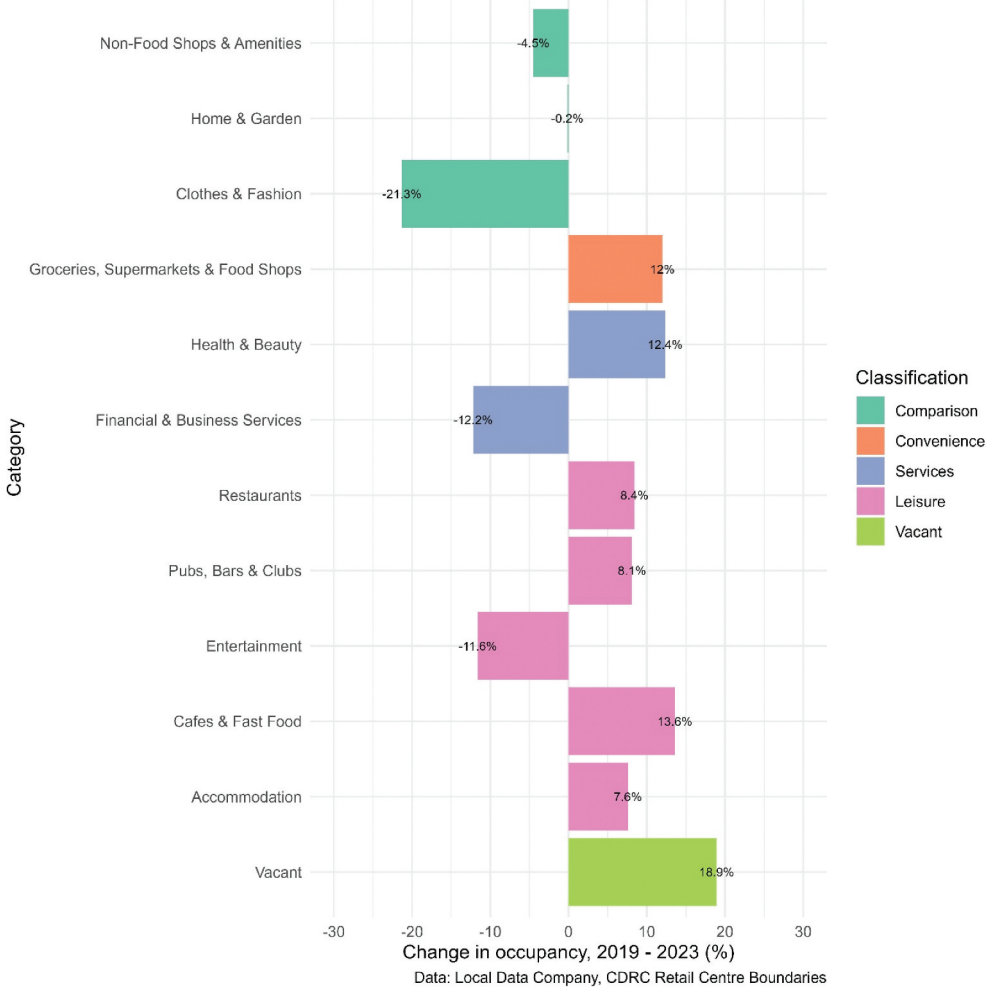

Figure 4. Occupancy changes by category between 2023 and 2019.

units increased by +18.9%, Figure 4 demonstrates that this was not driven by declines across all retail categories. Only five of the eleven categories contracted, with comparison retail, entertainment, and financial and business services contributing most to the rise in vacancies. In contrast, convenience retail and most of the 'leisure' and personal services categories performed strongly, recording net increases in occupancy. Thus, despite an overall increase in vacancy rates, traditional retail spaces continue to attract new occupiers, albeit at varying rates, with the broader trend indicating that closures outpace openings and that retail centre functions are undergoing structural transformation. In the section that follows, we unpack these trends further, considering the drivers of these category-level trends.

Decline

It is clear from Figure 4 that the largest decrease was recorded by clothes & fashion retailers, with 21% of units in this category having vanished in the analysed five years. Official statistics show that fashion experienced one of the largest shifts to online sales during the pandemic, and our results support this by documenting declines between −20% and −30% among the constituent sub-categories (see the full list in Appendix), corresponding to almost 5,000 stores vanishing in the analysed period. The non-food shops & amenities category also performed poorly, declining −4.5% between 2019–2023. This broad retail category includes primarily small independent retailers, alongside some 'multiple' retailers such as department stores. The major contributors to the decline (between −30% and −40%) (e.g., xxx adult services & shops, news agents, audio visual rental) were already experiencing a substantial decline pre-pandemic. This can be attributed to a snowballing effect of retail digitalisation and increasing competition from online retailers such as Amazon. Importantly, a more recent trend was observed where financial & business services recorded significant decline, largely driven by bank closures, with over 31% of 5,100 branches vanishing from the UK high streets between 2019 and 2023. This trend broadly reflects the increasing digitalisation of financial and other services as evidenced by declines among travel agents (−26%) and recruitment agencies (−24%). Likewise, the number of entertainment units decreased significantly, with tour operators (−28%), bookmakers (−24%), and bingo halls (−21%) most affected, reflecting the combined impact of retail digitalisation and COVID-19 lockdowns.

Growth and reorientation

The growth and reorientation of UK retail centres appear to be driven by convenience retail, leisure and health & beauty. The largest contributors to the growing number of stores within the 'convenience' group were grocers (+34%) and convenience stores (+20%), adding 700 and 1,700 stores respectively between 2019 and 2023. The trend was also present amongst cheese shops, fishmongers, and halal butchers, all opening new stores. Although the pre-pandemic number of these stores was rather small, it appears that a clear trend is emerging in favour of food options that extend the offering of supermarkets, to provide more speciality goods. Furthermore, the pre-pandemic growth within 'leisure' continued over the past five years, with cafes & fast-food and bars, pubs & clubs categories opening almost 7,000 new shops and venues. Within the restaurants sectors, new trends have emerged with healthier dietary options gaining popularity with substantial increases (34–64%) in Greek, Korean, Japanese and Vietnamese cuisines. The

vegan category, however, experienced the fastest growth (+135%), reflecting the rise of an environmentally conscious consumer base (Burton and Eike 2023; Paul, Modi, and Patel 2016). We also note an interesting trend in the evolving market of accommodation establishments with traditional B&B, hostels and guesthouses declining while serviced apartments and holiday flats increased substantially. Pre-pandemic growth in discount stores and health & beauty units also continued, adding 7,900 new outlets between 2019 and 2023, driven by cosmetic surgeries, dance schools, beauty salons, nail salons and barbers. Finally, other services such as job centres recorded substantial increases as according to the Department for Work and Pensions (2022), nearly 200 job centres were opened in 2022 to support employment and the transition to Universal Credit.

Initial post-pandemic recovery patterns

Analysis of initial recovery patterns between 2021 and 2023 suggests that, despite notable changes such as a modest decline in vacancy rates (−4.5%), the overall retail landscape remains similar to that of 2019–2021 (Figure 5). The data shows that in the post-pandemic recovery period, more retail types (182) recorded declines compared to the pandemic period (153), however, the magnitude of these decreases was slightly

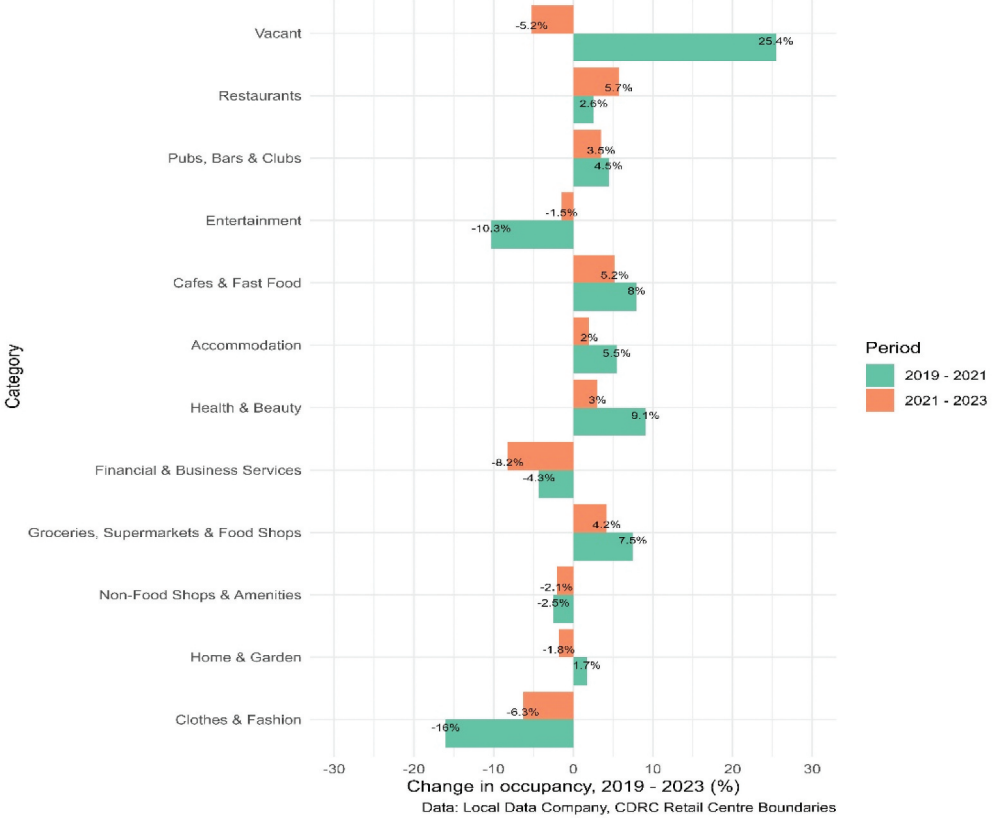

Figure 5. Change in occupancy rates by broad category: 2019–2021 vs. 2021–2023.

smaller. Furthermore, 11 retail types recorded no change, whilst 134 increased the number of units - a significantly lower number than the 163 in the pandemic period.

Figure 5 shows that in the initial recovery period, home & garden was the only retail category to decline, contrasting with the 2019–2021 period. The short-lived growth in this category may be explained by the reduction in working from home post-pandemic. The overall trend for most retail and service types has been relatively stable, although changes varied. The decline in entertainment (−1.5%) and clothes & fashion (−6.3%) was less severe than in the 2019–2021 period. In contrast, financial & business services experienced and accelerated post-pandemic decline, with closures doubling, primarily among banks (−25%) and recruitment agencies (−17%). The initial recovery was largely driven by leisure, convenience retail, and health & beauty services, although gains were generally smaller than in the previous period. The exception was restaurants, which continued to grow at an accelerated rate compared to the 2019–2021, with Vegan, Greek and some Asian restaurants recording significant gains.

Measuring spatial and temporal variations in economic performance of UK retail centres

Vacancy rate and vacancy rate change are often used to measure retail centres economic performance Dolega and Lord 2021; Hill and Cheshire (2023); thus, their temporal and spatial variation was examined, focusing on differences between specific periods (e.g. pre- and post-pandemic) and spatial scales (e.g. regional or district). Firstly, building on earlier discussion of national-level increases in vacancies (see Sections 3.1 – 3.3), we explored vacancy rate change across UK regions (Figure 6). Between 2019 and 2023 all UK regions recorded increases in vacancy rates with the highest increases recorded during the onset of the Covid-19 pandemic ranging between +14% for the North West and +25.3% for East Midlands. In the initial recovery period, average vacancy rates 'bounced back' in all regions except for Scotland, with decreases ranging from −12.5% in the South East (which had the second highest increase during the pandemic) to −1% in the West Midlands. Although there was some resilience across England and Wales, Scotland's retail landscape remained fragile, with vacancy rates increasing by +4.2%, representing an interesting subnational difference within the UK.

Secondly, we explored vacancy rates changes between 2019 and 2023 across the hierarchy of UK retail centres (Figure 7), as derived in Macdonald, Dolega, and Singleton (2022). Overall, there appears to be a clear trend with major retail centres towards the upper end of the retail hierarchy performing weaker, compared to the smaller centres towards the bottom end of the hierarchy. Figure 7 shows that the shock of the pandemic and its aftermath had a significant impact on the UK's top shopping destinations, including 'Large Shopping Centres' and 'Regional Centres'. The widespread shop closures in these types of centres have contributed to the greatest increases in vacancy rates at +35.9% and +30.4%, respectively. Although, the vacancy rates in these centres have slightly declined post-pandemic, their weaker performance reflects the combined effects of 'non-essential' retail stores closures and the prolonged adverse impact of remote working beyond the lockdowns and the pandemic period. This shift significantly reduced footfall and consumer activity in central urban locations, particularly in areas traditionally reliant on working population and visitors for

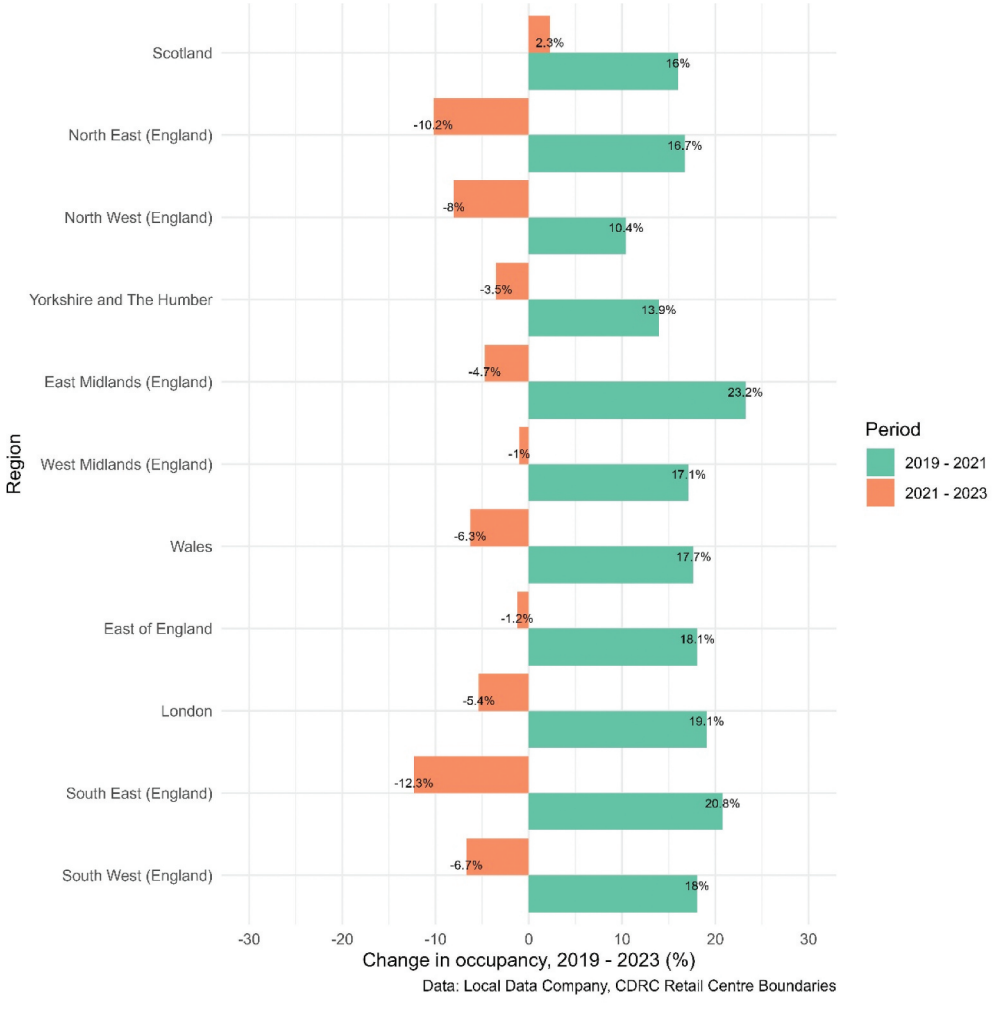

Figure 6. Vacancy rate change by UK region.

their vitality (Hill and Cheshire 2023). The strongest post-pandemic recovery was recorded in 'Large Shopping Centres' and 'Major Town Centres', with vacancy rates decreasing by −12.1% and −9.2%, respectively. However, the recovery was much more modest for the 'Regional Centres' (−4.8%) and Town Centres (−5.8%). Also, retail parks, dominated by large non-food stores, were adversely impacted by the onset of the pandemic, however they demonstrated the strong recovery in the initial post-pandemic period with vacancy rates improving as customers increasingly favoured car travel over public transport, due to lower perceived risk of infection. The trend was mirrored by other types of smaller and more local retail centres, which demonstrated some resilience to the shock of the pandemic. The 'rise in localism' trend, defined by Rybaczewska and Sparks (2020), was clearly visible in our results and appears to have been enhanced by the pandemic, which can be linked to altered footfall patterns due to the increase in working from home (Hill and Cheshire 2023). Finally, it is important

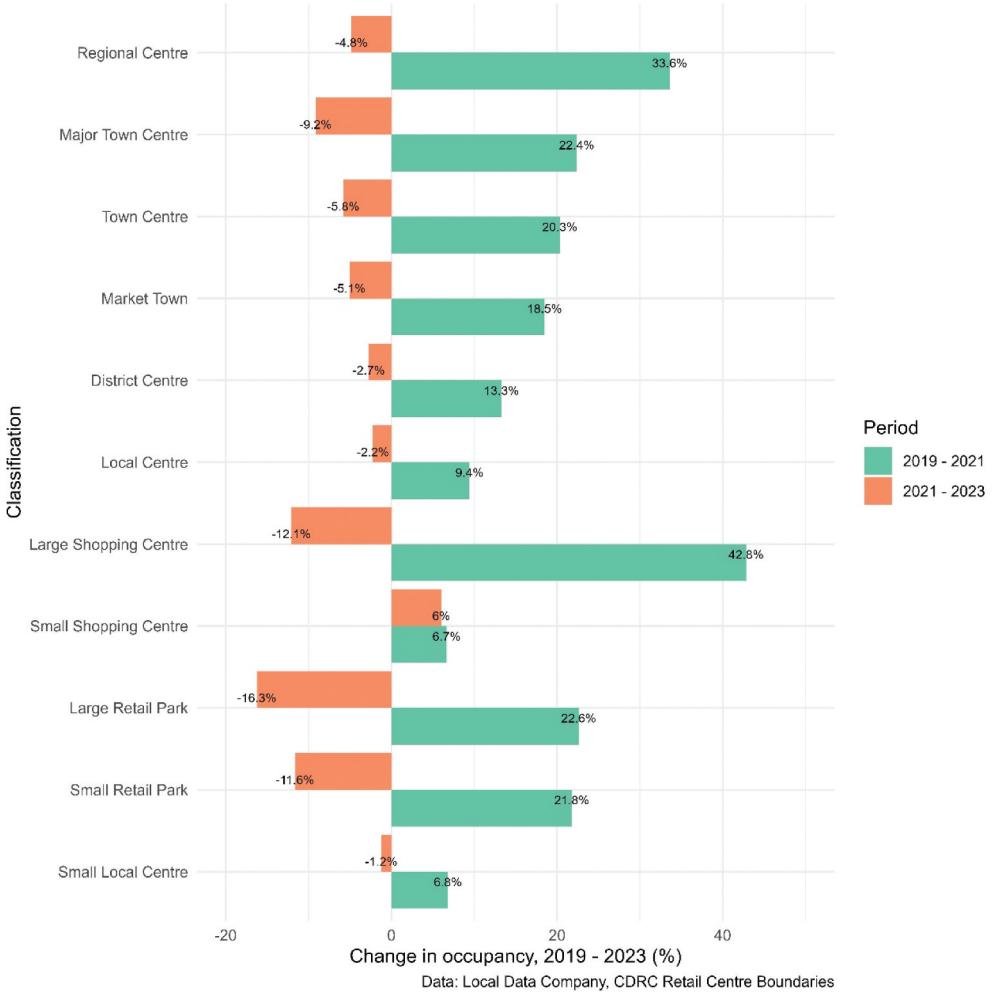

Figure 7. Vacancy rate change by UK retail centres hierarchy.

to note that small shopping centres, often outdated and located in secondary locations, displayed a distinct trend to that of large shopping centres that are typically leisure-oriented and serve larger catchments. This trend has also been observed in other Western economies.

Trajectories of retail centre performance

To analyse retail centres performance we use the conceptual typology of retail vacancy developed by Dolega and Lord (2021) supplemented by an examination of the retail and service types contributing to these vacancies. Firstly, we examine the magnitude, trajectory and persistence of retail vacancy at UK local authority districts (LAD) level. Dolega and Lord (2021) specify that examining those two variables facilitates depiction of retail centre performance trajectories over a given period of time. Low levels of retail vacancy are beneficial for retail centres, facilitating 'retail churn,' whilst high and persistent vacancy is

problematic, often signalling structural problems (Wrigley and Dolega 2011). Increasing or decreasing vacancy over longer periods can be associated with the resilience or fragility of a particular retail system. As such, there are four outcomes (quadrants) in this typology based on the magnitude and change of vacancy rate. However, we further extend this typology to examine how these four outcomes directly relate to the four stages of the adaptive cycle of retail centres presented in Figure 1: i) 'Low vacancy, getting lower' (LL - GROWTH); ii) 'Low vacancy, getting higher' (LH - CONSOLIDATION); 'High vacancy, getting lower' (HL - REORIENTATION) and iv) 'High vacancy, getting higher' (HH - RELEASE). Figure 8 shows the association between the pre-pandemic vacancy rate and the change in vacancy rate between 2019 and 2023 using the mean vacancy rate (10.9%) and a 0% vacancy rate change to delineate four quadrants, with the mean values for each UK LAD plotted to explore their performance trajectories.

The strongest performing retail systems are those in the (LL - GROWTH) quadrant, depicting the LADs with below the national average vacancy rates in 2019, which

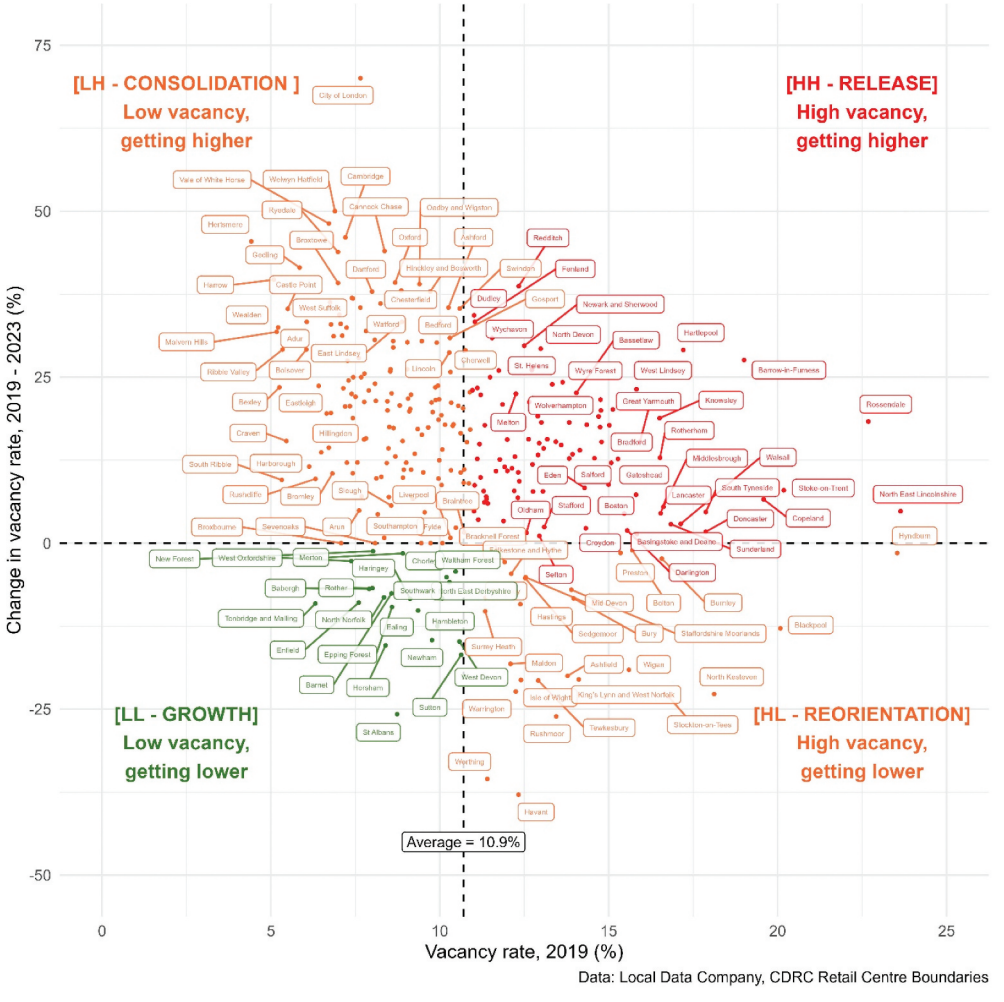

Figure 8. Vacancy rates vs. vacancy rate changes for UK local authority districts (LAD).

recorded further declines between 2019 and 2023, signalling the opening up of lots of new retail units. Only 6% of LADs fall within this category, they have slightly higher proportion of service-oriented units and are located in more affluent boroughs of Greater London and the South-East (e.g. St. Albans, West Oxfordshire and Ealing). The (LH - CONSOLIDATION) quadrant represents retail systems with vacancy rates below the national average, but weakening economic performance and rising vacancy rates indicating a 'CONSOLIDATION' phase characterised by reduced resilience and increased vulnerability. This quadrant comprises the highest number of LADs (49%) with some examples including larger towns and cities such as Leeds, Liverpool, and Oxford. Notably, the City of London recorded a substantial vacancy increase (~70%) despite low pre-pandemic levels. The (HL - REORIENTATION) quadrant indicates those LADs that struggled with high vacancy pre-pandemic, but they have managed to reduce it since 2019, demonstrating some resilience. Although this is an interesting trend, there are not many LADs falling within this category (~ 8%) – with some examples including some of the deprived coastal and post-industrial districts in the UK such as Warrington, Blackpool and Hastings. The weakest performing LADs were in the (HH - RELEASE) quadrant. They typically suffer from structural problems and have fragile configurations characterised by lower proportion of service units, which tend to be more vulnerable to disruptive shocks. They are characterised by high pre-pandemic vacancy rates that have risen further and are often located in many post-industrial, economically declining areas of northern England (e.g. St. Helens, Dudley and Barrow-in-Furness), and comprise around 36% of all LADs.

Then, we examined the magnitude of vacancy rate increases and decreases in each of the four quadrants and analysed the average change in retail and service categories that contributed to those changes, as shown below in Figure 9. Although the LAD-level analysis tends to mask some of the changes, this additional examination provides useful insights of the scale and complexity of the transformation occurring in each quadrant. Figure 9 shows that the largest changes in vacancy rates occur in the 'REORIENTATION' and 'CONSOLIDATION', rather than in the 'GROWTH' and 'RELEASE' stages. Furthermore, while the broad trends for most categories are similar across all quadrants, the rate of change varies significantly. For instance, retail centres in the 'RELEASE' stage experienced, on average, twice as high decline in clothes & fashion compared to those in the 'GROWTH' phase, while accommodation outlets contributed to the decline in the 'CONSOLIDATION' and 'RELEASE' stages, but recorded the opposite trend in centres classified within the 'RECONFIGURATION' and 'GROWTH' stages. Finally, growth in various 'leisure' and health and beauty outlets was most evident in the 'REORIENTATION' stage, while it was much more muted in the 'CONSOLIDATION' and 'RELEASE' stages. These findings are important as they demonstrate the complexity of changes experienced in each of four-cycle stages, prompting the need for further analysis and discussion to better understand them.

Discussion and conclusions

New evidence on the transformation of the UK retail landscape

This study presents novel data-driven insights into how UK retail centres responded to the Covid-19 pandemic and how their configuration and economic performance evolved between 2019 and 2023. This is a crucial period offering

Figure 9. Average LAD-level change in retail centre occupancy across adaptive cycle stages.

a valuable perspective on the UK retail landscape and its configurational transformation within three different periods: pre-pandemic, within-pandemic and the initial post-pandemic 'recovery'. Pre-pandemic debates highlighted the demise of traditional high streets and town centres due to weakening demand for physical retail (Dolega and Lord 2020; Hughes and Jackson 2015), while recent research positions the Covid-19 pandemic as a catalyst accelerating the transformation of the retail landscape (Ballantyne, Singleton, and Dolega 2022; Frago 2021). This

study provides crucial empirical evidence that corroborates these claims. Moreover, it indicates that Covid-19 and the subsequent muted recovery, contributed to the continued decline of retail activity, further eroding the economic performance of 'traditional' high streets, evidenced by increasing vacancies.

Taking a data-driven approach, we have identified retail types most adversely affected by the pandemic and those that displayed strong resilience. The findings also show that the ongoing trend of retail digitalisation, intensified by the pandemic, has remained persistent in the initial post-pandemic period. The relatively short impact of the temporary closure of 'non-essential' shops, accelerated consumer shifts towards digital channels. This was particularly evident in the decline of specific retail sectors such as clothing and fashion retailers—which continue to be impacted by the rise of online retailers like ASOS and SHEIN, alongside competition from digital financial services and entertainment providers. These findings extend existing research that has documented decreasing visits to the traditional retail centres in favour of more 'essential' forms of retail (Ballantyne, Singleton, Dolega, and Credit 2022; Trasberg and Cheshire 2023). We argue that many of these 'failing' retailers and service providers are unlikely to return to the high street, given the ongoing cost-of-living crisis, radically reduced Government support schemes (e.g. business rates relief) and further digitalisation of retailing and services. Rather than a broad-based recovery, a further decline in specific types of retail and services—particularly those most susceptible to digitalisation—is more likely.

In contrast and resonating with the frameworks of adaptive resilience (Orr et al. 2023; Wrigley and Dolega 2011), our findings also reveal some capacity to generate new opportunities and reorientation—although to a lesser extent than the recorded patterns of retail decline. A key contribution of this paper lies in identifying several emerging trends that can facilitate the reorientation and revitalisation of UK high streets post-pandemic. In line with Rybaczewska and Sparks (2020) who highlight a growing consumer preference for sustainability and locally based goods, services, and retail experiences, we find that 'consumer experiences', particularly personal services and leisure activities including the night-time economy, have become increasingly important in the post-pandemic reconfiguration of retail centres. UK traditional retail and consumption spaces have benefited from sustained growth in convenience retail, personal care services, and dining establishments—including restaurants, cafés, bars, and takeaways—which have proved resilient as they emerge from the pandemic shock. This growth reflects longer-term shifts in consumer preferences toward experiential consumption and specialist diets, as well as pandemic-induced changes in working arrangements and government-supported business rates relief. Besides, some retailers that were heavily digitised in the early 2000s' (e.g. bookshops, games, music shops), and those that were decimated by the expansion of large supermarkets (e.g. butchers, fishmongers, bakers), appear to have reversed the previous negative trend. The latter trend also adds a subtle yet notable element to the revival narrative of traditional local high streets, though to a relatively small extent.

Overall, since the pandemic, smaller neighbourhood centres have demonstrated renewed relevance and economic resilience. Serving nearby neighbourhoods and supported by the ongoing popularity of working from home (Gibbs et al. 2024), demand for

leisure and convenience retail is likely to remain strong, reinforcing the 15-minute city framework (Moreno et al. 2021).

The evolving trajectory of traditional retail spaces

Retail vacancy rate has provided a useful metric to explore changing economic performance as it is a 'high visibility' indicator of the changing economic performance of high streets (GENECON 2011). Our findings show that vacancy rates in UK retail centres increased substantially (+18.9%) over the five-year pre- and post-pandemic period, with the initial shock of the Covid-19 pandemic driving it to a record-high increase (+25.4%). This was followed by a post-pandemic reduction of vacancy at −5.2%, which suggests a rather weak and sluggish initial recovery, and given the post-pandemic economic pressures, further raises concerns about the potential obsolescence of some of these spaces (Hughes and Jackson 2015; Lashgari and Shahab 2022).

Another key contribution of this study was identifying four different performance trajectories of UK retail landscape by analysing vacancy rates and their change over the five-year pre- and post-pandemic period. More specifically, this new evidence contributes to the debate on the economic viability and adaptive resilience of UK retail systems at district level in two ways: i) by conceptualising their economic performance and trajectories through the application of the adaptive cycle framework (Figures 1 and 8) and ii) illustrating the dynamics of decline and growth by identifying the 'winners' and 'losers' within the processes, and linking them to the four stages of the adaptive cycle (Figure 9).

Overall, the results present a rather concerning picture, with the majority of LAD retail systems (approx. 85%) showing poor economic performance and falling within the 'RELEASE' or 'CONSOLIDATION' phases, demonstrated by substantial increases in vacancy rates over the study period. It implies that most of these retail systems have been adversely impacted by the Covid-19 pandemic and struggled to attract new occupiers in the subsequent initial recovery period, often exacerbating their pre-existing vulnerabilities. While a large number of LADs with relatively robust economic performance in the past were propelled into a new trajectory of structural weakening ('CONSOLIDATION' phase), particularly concerning are the most vulnerable LADs with long-term structural vacancy problems that declined further ('RELEASE' phase). The ongoing reconfiguration shows only modest growth in convenience retail, takeaway outlets, and health and beauty services, but overall closures continue to outnumber openings, indicating a persistently negative trend. As such retail centres at these stages are of particular concern as ongoing trends of the digitalisation of retail and services, current cost of living crisis and socioeconomically disadvantaged catchment populations may exacerbate their fragility and impede their transition towards growth and reconfiguration. Consequently, these centres risk prolonged stagnation, further decline, or functional transformation away from retail.

Conversely, approximately 15% of retail systems at district level displayed certain degree of resilience ('GROWTH' and 'REORIENTATION') with several predominantly affluent LADs successfully attracting new occupiers and decreasing their vacancy levels further. More intriguingly however, some of the less affluent LADs, with diminished competitive advantage and high vacancy levels in the pre-pandemic also reversed the negative trend and managed to attract new occupiers despite economic hardships. This

provides evidence that some previously poorly performing centres have begun a positive transformation following the Covid-19 pandemic, although their vacancy rates remain above the national average. The results indicate that retail centres in the 'GROWTH' and 'REORIENTATION' stages exhibited a marginally higher proportion of service-oriented units over the analysed period compared to the LADs in the 'RELEASE' and 'CONSOLIDATION' stages. Notably, the reorientation of these retail systems appears to be primarily driven by an expansion in leisure and personal services alongside a measurable growth in convenience retail. Importantly though, analysis at the LAD level masks changes occurring at the individual retail centre level, warranting a more granular analysis to fully understand the ongoing processes.

Research implications and concluding remarks

Our new insights on the economic performance of British retail centres and their transformation over the past five-year pre- and post-pandemic period can be used to substantiate the wider debates on the current and future trajectories of British retail centres. The evidence presented in this study enhances our understanding of how retail systems adapt to major economic shocks and navigate the initial post-shock recovery process, across multiple spatial scales amid long-term and emerging pressures. It highlights the extent of structural reconfiguration of these systems and reveals their differential performance trajectories, providing a basis for assessing retail system resilience and identifying factors that influence recovery and adaptation.

We are confident that our descriptive analysis is robust and fully transparent, however it is not free from limitations. Although, beyond the scope of this study, there are various supply and demand factors driving the trends we have observed. While this study focuses on supply factors and configurational transformations, we acknowledge that evolutionary trajectories need also to be linked to the socio-economic characteristics of retail centre catchments (Singleton et al. 2016; Dolega and Lord 2021). This is of vital importance, given that the findings presented in Figures 8 and 9 cannot clearly be explained in terms of supply-side structural change. Regarding data-related limitations, although LDC retail centre occupancy data are the most comprehensive in the UK, the lack of consistent unit-size information may introduce bias and lead to overreliance on small units; therefore, this study focused on aggregated data across various spatial levels. Furthermore, our depiction of the spatial heterogeneity of retail systems performance is coarse in its spatial scale, prompting a more meaningful analysis at a more granular level. However, as the key aims of this study were to unpack the broader trends shaping the transformation of UK retail landscape, we leave scope for further analysis which explores trends seen at the individual retail centre level and covering longer post-pandemic period. Examination of their vacancy rates (and performance trajectories), linking them to catchment characteristics and obtaining statistically significant supply and demand-related drivers of their performance, constitutes the focus of our forthcoming investigation. In particular, we aim to examine the four cycles in greater depth to understand how this multidimensional set of factors interacts at the level of individual retail centres, shaping short- and long-term resilience, recovery, and progression through the adaptive cycle stages.

Our research contributes to the academic discourse on the evolutionary trajectories and vitality of UK traditional retail spaces, contextualising recent transformations

within existing theoretical frameworks (i.e. Dolega and Lord 2021; Dolega and Celińska-Janowicz 2015). By providing data-driven evidence, we are able to advance the insights of Orr et al. (2023) to consider how a national system of retail centres, spanning the entire retail centre hierarchy, sits within these frameworks. We argue that the Covid-19 pandemic has modified the pre-pandemic evolutionary trajectories of UK retail systems with the initial post-pandemic configuration characterised by higher levels of vacancy and reduced adaptive capacity. This is especially concerning given the rapid growth of online retail platforms and integration of AI technologies within society, and may be especially challenging to address in the short-term. Despite some evidence that UK retail centres are undergoing some reorientation led by convenience retail, leisure and personal services, the excess of physical retail space (i.e., vacant units) is now greater than ever.

Policy implications for revitalising UK high streets and town centres include evidence indicating that the competitive advantage of e-commerce will likely continue to adversely affect the composition of retail centres, although in some cases their evolutionary trajectories and transformation may be increasingly difficult to predict. We acknowledge other calls to reconsider the economic value of physical retailing, particularly as major retailers are likely to continue to divest in UK high streets and town centres. Supporting a greater diversity of uses is one way we could deal with this surplus of retail space, linking to existing work on the repurposing of retail for other important services and functions (Jackson et al. 2024). At the same time, a stronger focus on the 15-minute cities concept may be an appropriate tool in response, which can adapt these spaces to be more fit for new working arrangements and increase the attractiveness of high streets and retail centres through greater emphasis on high-demand amenities (e.g., health and beauty, food and beverage services). Finally, policy interventions aimed at revitalisation of UK retail centres must consider the broader challenges arising from the Covid-19 pandemic, cost-of-living crisis, emerging technologies, and the global climate crisis. Such an approach should promote data-driven decision making, visionary leadership and a combined effort from policy makers, town centre managers and retailers to realise a vision for what a modern, attractive and (economically and environmentally) sustainable retail centre should be. Through utilisation of the theoretical tools and insights we have presented, such efforts should now be much more feasible, helping to prepare for the future of retailing in traditional spaces of consumption like high streets.

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Patrick Ballantyne was a postdoctoral researcher in the Geographic Data Science Lab at the University of Liverpool. His research involves using quantitative and spatial approaches to understand retail environments, with a particular interest in those outside the UK. His expertise lies in the geographies of retail centres and in applying these insights to assess the impacts of wider retail sector processes, such as e-commerce and economic shocks.

Alex Singleton is professor of Geographic Information Science at the University of Liverpool, and Deputy Director of the ESRC GeoDS. His research is concerned with how the complexities of individual behaviours manifest spatially and can be represented and understood through a framework of geographic data science. In particular, his research has extended a tradition of area classification, and he has developed a broad critique of the ways in which geodemographic methods can be refined through modern scientific approaches to data mining, geographic information science and quantitative human geography.

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Appendix. local data company categories and sub-categories

Key UK SIC codes	Category	SubCategory
I 55.10 I 55.20 I 55.90	Accommodation	Bed & Breakfast Guesthouses Holiday Accommodation & Parks Holiday Flats Hostels Hotels – 3 Stars Hotels – 4 Stars Hotels – 5 Stars Hotels - Others Serviced Apartments
I 56.10/2 I 56.10/3	Cafes & Fast Food	Cafe & Tearoom Cake Makers, Decorators & Supplies Caterers Chinese Fast Food Takeaway Coffee Shops Confectioners Fast Food Delivery Fast Food Takeaway Fish & Chip Shops Ice Cream Parlours Indian Takeaway Juice Bars Pizza Takeaway Sandwich Delivery Service Take Away Food Shops

(*Continued*)

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Key UK SIC codes	Category	SubCategory
G 47.71 G 47.72	Clothes & Fashion	Bride & Groom Shops Buttons, Buckles & Beads Clothes - Children Clothes - Men Clothes - Women Clothing Repairs & Alterations Dance & Balletwear Designers - Garments Dress Agencies Dressmakers Dresswear Hire Fashion Accessories Fashion Shops Hat Shops Kilt Shops Knitwear & Textiles Leather Goods Leisure Wear Lingerie & Hosiery Maternity Wear Riding Wear Shirt Makers Shoe Shops T-Shirts Tailors Theatrical Costumes & Fancy Dress Uniforms & Staffwear

(*Continued*)

(Continued).

Key UK SIC codes	Category	SubCategory
R 90 R 91 R 92 R 93	Entertainment	Amusement Parks & Arcades Bingo Halls Bookmakers Bowling Alleys Cinemas Golf Courses Information Centre Museums & Art Galleries Paintball & Combat Games Party Venues & Function Rooms Snooker, Billiards & Pool Halls Sports Grounds & Stadiums Theatres & Concert Halls Ticket Outlets & Box Offices Tour Operators

(*Continued*)

(Continued).

Key UK SIC codes	Category	SubCategory
		ATM Lobby
		Auctioneers & Valuers
		Banks & Other Financial Institutions
		Building Societies
		Bureaux de Change
		Chartered Surveyors
		Cheque Cashing
K 64	Financial & Business Services	Credit Unions
K 65		Estate Agents
K 66		Financial Advisors
M 69		Insurance Agents
M 70		Job Centres
L 68		Letting Agents
		Mortgage Companies & Advisors
		Post Office Services
		Recruitment Agencies
		Travel Agents

(*Continued*)

(Continued).

Key UK SIC codes	Category	SubCategory
G 47.11 G 47.2	Groceries, Supermarkets & Food Shops	Bakers Shops Butchers Cash & Carry Cheese Shops Chocolatiers Convenience Stores Delicatessen Fishmongers Gourmet Food Greengrocers & Fruitsellers Grocers Halal Butchers Supermarkets Tea & Coffee Merchants Wine Making & Brewer Supplies Wines, Spirits & Beers

(*Continued*)

(Continued).

Key UK SIC codes	Category	SubCategory
S93.1 S 96 Q 86G 47.73	Health & Beauty	Alternative & Complementary Medicines Barbers Beauty Products Beauty Salons Chemists/Toiletries Cosmetic Dentistry Cosmetic Surgery Dancing School Dentists Doctors' Surgeries Hair & Beauty Salons Hairdressers Hairpieces & Wigs Health & Beauty Shops Health Centre Health Clinics Health Clubs Health Foods & Products Hearing Aids Herbalists Hospitals Laser Eye Treatment Leisure Centres & Swimming Baths Medical Centres Nail Salons Opticians Sports Clubs Tanning Shops Tattooing & Piercing

(*Continued*)

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Key UK SIC codes	Category	SubCategory
		Air Conditioning Equipment
		Bathroom Equipment & Fittings
		Beds, Bedding & Blankets
		Blinds, Awnings & Canopies
		Builders
		Builders' Merchants
		Candle Suppliers
		Carpet, Curtain & Upholstery Cleaners
		Carpets & Rugs
		Central Heating - Installation & Servicing
		China & Glassware Shops
		Craft Centres & Shops
		Curtains - Retailers & Makers
		D.I.Y.
		Domestic Appliances
G 47.5 F 43	Home & Garden	Door & Window Furniture
		Fireplaces & Mantelpieces
		Floorcoverings
		Furnishers
		Furniture - Built-In & Fitted
		Furniture - Repairing & Restoring
		Furniture Shops
		Garden & Patio Furniture
		Garden Centres
		Gas Log & Coal Fires
		Glass Merchants
		Glaziers
		Hardware Merchants & Ironmongers

(*Continued*)

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Key UK SIC codes	Category	SubCategory
		Household Services
		Household Stores
		Hydroponics
		Interior Design/Decoration
		Joiners
		Kitchen Planners
		Kitchenware
		Landscape Gardeners
		Lighting Retailers
		Linen Shops
		Locksmiths
		Mirrors & Decorative Glass
		Painting & Decorating Supplies
		Plumbers
		Plumbers Merchants
		Satellite Television - Equipment & Services
		Security Equipment
		Soft Furnishings
		Storage & Removals
		Tile Stockists
		Upholsterers
		Wallpapers & Wall Coverings
G 47.19 G 47.4 G 47.6 G 47.7 S 96	Non-Food Shops & Amenities	Antique Dealers
		Antiques - Repairing & Restoring
		Art & Craft
		Art Galleries & Fine Art Dealers

(*Continued*)

(Continued).

Key UK SIC codes	Category	SubCategory
		Audio Visual Rental
		Boat Shops
		Books - Rare & Secondhand
		Booksellers
		Camping Goods & Outdoor Wear
		Card & Poster Shops
		Catering Equipment
		Charity Shops
		Clocks & Watches
		Coins & Medals
		Collectors Items
		Comics Bookshops
		Computer Games
		Computers
		Cycle Shops
		Department Stores
		Disco Equipment - Hire & Sales
		Discount Store
		Dolls & Dolls' Houses
		Driving Schools
		Dry Cleaners
		Electrical Goods
		Electricians
		Engraving
		Fabric Shops
		Factory Outlets
		Film Developers
		Fishing & Angling Equipment
		Florists

(*Continued*)

(Continued).

Key UK SIC codes	Category	SubCategory
		Funeral Directors and Monumental Masons
		Games Shops
		Gift Shops
		Goldsmiths & Silversmiths
		Golf Equipment & Supplies
		Guns & Sporting Equipment
		Haberdashers
		Hire Centres
		Home Entertainment
		Internet Cafes
		Jewellers
		Language Schools
		Laundries & Launderettes
		Luggage Shops
		Mail Order & Catalogue Showrooms
		Mobile Phones
		Mobility Services
		Model Shops
		Music Shops
		New Age Shops
		Newsagents
		Nursery Goods & Accessories
		Party Goods/Novelties
		Pawnbrokers
		Pet Shops & Pet Supplies
		Photographers
		Photographic - Retail
		Pianos & Accessories
		Picture & Photo Framers

(*Continued*)

(Continued).

Key UK SIC codes	Category	SubCategory
		Picture & Picture Frame Restoration
		Postal, Packing & Shipping
		Potteries & Ceramics
		Printer Cartridges
		Printers
		Records, Tapes & CD's
		Safe Deposit Boxes
		Secondhand Shops
		Sewing Machines
		Shoe Repairs
		Sign Shops
		Skiing Equipment
		Souvenir Shops
		Sports Goods Shops
		Stationers
		Stonemason
		Surplus Stores
		Textiles
		Toy Shops
		Tyre Dealers
		Vaping Stores and Tobacconists
		Video Library
		Watch, Clock & Jewellers Repairs
		Watches
		Wedding Companies
		XXX - Adult Services
		XXX - Adult Shops
S 96 H 53	Non Retail	Car Wash & Valet Services

(*Continued*)

(Continued).

Key UK SIC codes	Category	SubCategory
		Delivery Services
		Libraries
		Miscellaneous
		Veterinary Surgeons & Practitioners
		Wholesalers
I 56.3 R 92	Pubs, Bars & Clubs	Bars
		Casino Clubs
		Comedy Clubs
		Lounge Bars
		Night Clubs
		Private Clubs
		Public Houses & Inns
		Social Clubs
		XXX - Adult Venues
I 56.1	Restaurants	Restaurant - Afghan
		Restaurant - African
		Restaurant - American
		Restaurant - Argentinian
		Restaurant - Asian
		Restaurant - Bangladeshi
		Restaurant - Brasserie
		Restaurant - Brazilian
		Restaurant - British
		Restaurant - Caribbean
		Restaurant - Chinese
		Restaurant - Continental
		Restaurant - Creperie
		Restaurant - Eastern European

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Key UK SIC codes	Category	SubCategory
		Restaurant - English
		Restaurant - European
		Restaurant - French
		Restaurant - Greek
		Restaurant - Indian
		Restaurant - International
		Restaurant - Iranian
		Restaurant - Iraqi
		Restaurant - Italian
		Restaurant - Jamaican
		Restaurant - Japanese
		Restaurant - Korean
		Restaurant - Kosher
		Restaurant - Lebanese
		Restaurant - Malaysian
		Restaurant - Mediterranean
		Restaurant - Mexican/Tex Mex
		Restaurant - Middle Eastern
		Restaurant - Moroccan
		Restaurant - Nepalese
		Restaurant - Oriental
		Restaurant - Pakistani
		Restaurant - Pizzeria
		Restaurant - Polish
		Restaurant - Portuguese
		Restaurant - Scottish
		Restaurant - Seafood
		Restaurant - South American
		Restaurant - Spanish

(*Continued*)

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Key UK SIC codes	Category	SubCategory
		Restaurant - Thai
		Restaurant - Turkish
		Restaurant - Vegan
		Restaurant - Vegetarian
		Restaurant - Vietnamese
		Restaurant & Bar
	Vacant	Vacant Properties