

# #WOOLLIES 10



## TEN YEARS ON: WHAT HAS BECOME OF WOOLWORTHS' FORMER STORES?

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## JOIN THE CONVERSATION

Got a story to tell about Woolworths? Want to share a picture of your own local branch? Spotted a mistake in this report, or something that needs updating?

Head over to Twitter, Facebook or LinkedIn and join the conversation using the hashtag #Woolies10. You can follow our tweets at @soul and @cannyinsights.

*Cover photos of former Woolworths, top row: Bangor (NI), Wakefield, Stowmarket, Pwllheli; middle row: Gainsborough, Penzance, Alnwick, Kendal; bottom row: Shrewsbury, Cosham, Wembley Preston Road, Falkirk. These and all other modern photographs in the report are by Graham Soult, taken during our site visits.*

## RESEARCH HEADLINES



Former Woolworths, now Poundland, Bromsgrove (store #427)

- The vast majority of the 807 former Woolworths premises – 738 (91%), excluding those that are currently empty – remain entirely or partly in active retail use.
- Only four – or 0.5% – have never been reoccupied at all over the last decade.
- A further 43 ex-Woolworths sites are currently fully vacant after previously being occupied – a notable increase on the 22 recorded in our 2014 update.
- Nearly half of ex-Woolworths sites (350; 43%) house variety stores, like Poundland, B&M or Poundstretcher – so, retailers whose offer is similar to that previously provided by Woolworths.
- The biggest single occupant of ex-Woolworths sites, by far, is Poundland with 147 – nearly a fifth of the estate.
- More than one in five Woolworths sites (176) now accommodate a grocery or convenience store, such as Iceland, Heron Foods or Tesco.
- At least 86 former Woolworths properties – 11% – have been permanently subdivided to accommodate more than one new occupant.
- We are only aware of 22 Woolworths sites that have been wholly turned over to non-retail uses, and a further 23 that are now non-retail in part.
- Non-retail uses across the ex-Woolworths estate include pubs, restaurants, gyms, libraries, offices, an accountant, a training centre, a function room, a gallery space, a nursery, a health centre, and two dentists.
- Just six former Woolworths premises (fewer than 1%) have been demolished in the last decade.



Former Woolworths, now B&M, Chester-le-Street (store #267)

## WHAT WE'VE DONE

After Woolworths closed in 2009, we identified the 807 locations from which it was trading immediately prior to its collapse.

We have tracked subsequent occupants of these premises over the past ten years, using a combination of our own site visits and detailed desk research. Each location's status was most recently checked between October and December 2018.

You can read more about the scope of our research on page 5, and our methodology on page 15.

## WHY DOES IT MATTER?

Ten years after its disappearance from British high streets, it's easy to question why we're *still* going on about Woolworths.

It's certainly the case that Woolworths – founded in the United States in 1878 – is an important, remarkable part of the UK's retail history, even though as a business it is no longer with us.

## A CENTURY ON BRITISH HIGH STREETS

Following its first British store opening, in Liverpool's Church Street on 5 November 1909, the retailer went on to be a fixture of UK high streets for nearly a century.

Across that period – allowing for all its openings, closures and relocations over the years – there are over 1,400 UK sites that at one time housed a Woolworths branch.



The very first UK Woolworths store (store #1), in Church Street, Liverpool, shown (centre) in a detail of a 1917 postcard. The store traded here until 1923, and then from across the street until 1983



1933 postcard showing a distinctive purpose-built Woolworths store in Chippenham on the left (store #493). The frontage was remodelled in the 1970s, and the store traded from this site until Woolworths' collapse

## A DISTINCTIVE BUILT HERITAGE

Between the 1920s and 1970s, Woolworths built or redeveloped many of its own stores, creating an architectural legacy – with plenty of distinctive features, if you know what to look for – that survives in large part to this day.

By the time of Woolworths' demise, its estate had shrunk to 807 stores – some way below the peak of over 1,100 reached in the late 1960s, but still a sizeable store network by the standards of modern British retailers.

## A RETAIL PROPERTY SHOCK

Going from 807 stores to none in just 40 days, Woolworths' closure released nearly 7.2 million square feet of retail sales area on to the market all at once – equivalent to the space of 2,500 Tesco Express shops or 63 John Lewis stores<sup>1</sup> – affecting cities, towns and suburbs in every part of the country.

It also, of course, resulted in 27,000 people losing their jobs, many of whom had a long and proud history of service at Woolworths.

No subsequent retail collapse – even that of BHS, which employed 11,000<sup>2</sup> when it closed in 2016 – has come close to Woolworths in terms of how many working lives it has impacted.

## A WINDOW ON RETAIL CHANGE

Our ongoing research allows us to not only report on what the 807 former Woolworths sites are now, but also to understand the change that has taken place as intervening occupants have opened and closed.

By looking at the former Woolworths estate in this way, we gain a unique snapshot of commercial property activity across the UK, and a window on how the country's retail landscape has changed over the past decade.



Ethel Austin – pictured at Prescott's ex-Woolworths (store #610) in 2012 – is a subsequent occupant that has itself now disappeared

## RESEARCH SCOPE

### WHAT'S INCLUDED

In this research, we've looked at the 807 locations that Woolworths was trading from when it collapsed into administration on 26 November 2008, and that became vacant as a result of the business closing all its stores between 27 December 2008 and 6 January 2009.

### ...AND WHAT'S NOT

Some sources, such as BBC News<sup>3</sup>, mistakenly refer to 815 stores. It's likely that this includes seven stores whose sale to Tesco was already agreed in October 2008<sup>4</sup>, and that had closed prior to Woolworths' collapse. Another store, in Wood Green, had already closed on 13 September.

Earlier in 2008, Woolworths had also disposed of four large stores to Waitrose<sup>5</sup>, and exited other sites in York, Braehead, Luton, Tamworth Ventura and Broughton Park. These too are excluded from the present research.

On this basis, we haven't, of course, featured any other historic Woolworths locations either – another 600 or so sites that Woolworths opened and closed throughout its 99-year UK history.

Elsewhere, there are many locations where Woolworths stores were shrunk in size over the years, as parts of sites were hived off – especially in the 1980s – to other retailers.



*In Boscombe (store #179), Woolworths traded until the end in what is now Poundstretcher, but also occupied Superdrug's part until 1989*

Superdrug, which was acquired by Woolworth Holdings in 1987, particularly grew its estate this way, which is why so many latterday Woolworths stores had a Superdrug still trading next door. Again, our research excludes these earlier divestments, and looks only at the reuse of space that Woolworths still occupied at the time of its collapse.

Looking into the future rather than the past, we have also excluded the planned new-build store in Calne that Woolworths had intended to open by the end of 2009 (and that ended up being occupied by M&Co instead).

Finally, our research omits Woolworths' eight trial concessions inside Somerfield stores (whose space would just have been reoccupied by Somerfield again).



*Bitterne in Southampton (store #1275) was the final Woolworths store to open, in October 2008 – it lasted just two months. 99p Stores, pictured here in 2015, took over in 2009; the premises are now occupied by Poundland, which acquired the 99p Stores business in 2015*

# RESEARCH FINDINGS

## NEW OCCUPANTS BY TYPE



Wellworth It in Ledbury, opened in 2010, is one of relatively few independent businesses – and one of even fewer indies explicitly inspired by Woolworths – to make a success of an ex-Woolies location (store #696)

- Nearly half of ex-Woolworths sites (350; 43%) house **variety stores** of one form or another, such as Poundland, B&M, Poundstretcher and Wilko – so, in effect, retailers whose offer is similar to that previously provided by Woolworths.
- More than one in five Woolworths sites (176) now accommodate a **grocery** or convenience store, with Iceland (73), Heron Foods (29) Tesco (23) and Sainsbury's (13) accounting for the bulk of that number.
- **Fashion** stores – such as H&M (22), M&Co (20), Peacocks (20), New Look (17) and TK Maxx (10) – between them occupy 124 ex-Woolworths locations.
- The number of **coffee shops** in former Woolworths premises is less than you might expect – just ten (1%), of which seven are Costa. In all but three of these locations, coffee shops occupy just part of a subdivided Woolworths site, reflecting the large size of many of the stores that were vacated.
- If you want to place a bet, you'll have to look hard – we're only aware of two **bookmakers** across the former Woolworths estate, both in small sections of subdivided stores.
- **Charity shops** are one of the more transient uses across the former Woolworths estate. There are currently only 15 (2%) – ten of which are British Heart Foundation – but another six Woolworths sites have housed a charity shop at some point in the last decade.



The British Heart Foundation occupies part of the former Woolworths in Leith, Edinburgh (store #180)

- The proportion of Woolworths sites currently occupied by **small independent retailers** and businesses – 72, or 9% - is relatively modest.
- However, at least another 31 sites have housed small independents at some point in the last decade but **no longer do so** – demonstrating the challenge for small businesses of making a go of these prominent, and often large and relatively expensive, premises.<sup>6</sup>

TOP 10 NEW OCCUPANTS		
1		147 <sup>7</sup>
2		73
3		55 <sup>8</sup>
4		33 <sup>9</sup>
5		29 <sup>10</sup>
6		26
7		25
8=		23 <sup>11</sup>
8=		23
10		22



Combined Poundland and Pep&Co in the former Woolworths in Weston-super-Mare (store #81). This is one of seven Poundland stores in a former Woolworths originally taken over by the now-defunct Ethel Austin

## TAKING A POUNDING

While Poundland has thrived off the back of Woolworths' demise, independent pound shops in ex-Woolies locations have often fared less successfully.

Proving there's more to single-price retailing than merely being cheap – including the product range, customer experience, and buying power needed to offer great value – here are just some of the post-Woolies indie pound shop fascias that have been, and fairly quickly gone...

89p Stores	89p Super Store
The 90p Store	Max 99p
Pound Deals	Pound Mania
Pound or 2 Plus	Pound-Mart
Pound Deals	Pound Mania
Poundstar	Poundsworth

## NEW OCCUPANTS BY RETAILER

- The biggest current occupant of ex-Woolworths sites, by far, is **Poundland** with 147 – nearly a fifth of the 807 stores. At least 71 are co-branded as **Pep&Co**, the fashion fascia that Poundland is rolling out across the estate.
- However, only 64 of those 147 are ex-Woolworths sites that Poundland acquired directly. The rest (83) have been **added later**, most notably through Poundland's acquisition of **99p Stores** (51 currently trading sites), and by snapping up former Woolworths stores vacated in turn by retailers like Ethel Austin (7), TJ Hughes (4) and Carpetright (3).
- Other than Poundland, the only retailers to have taken more than 50 ex-Woolworths sites each are **Iceland** and **B&M**, currently trading from 73 and 55 locations respectively.

## VACANCY AND CHURN



Former Woolworths in Stanley (store #873) in November 2018 – now empty again after the collapse of Store Twenty One

- Of the 807 former Woolworths premises, only four – or 0.5% – have **never been reoccupied** at all over the last decade, compared to seven at this point five years ago. These four stores are Kidderminster, Longton, Margate and Newton Aycliffe.
- A further 43 ex-Woolworths sites are understood to be **currently fully vacant** after previously being occupied – a notable increase on the 22 recorded in 2014.
- Three subsequent occupants of Woolworths sites – Poundworld (11 stores), The Original Factory Shop (7) and Store Twenty One (3) – account for nearly half these currently empty locations, after themselves recently going bust or **shedding stores** via a company voluntary arrangement (CVA).
- Indeed, **churn** is a significant factor affecting the former Woolworths estate. In 292 locations – 36% – the occupants now are not the same as those who took over the premises originally, contrasting with the longevity that Woolworths often had in those same places.



Ex-Woolworths in Amersham (store #766) as short-lived son-of-Woolies chain Alworths in 2010. The site is now Little Waitrose

## TOP 10 PAST OCCUPANTS

Which retail fascias have taken over, and then exited, the most former Woolworths sites?

1		64	Taken over by Poundland in 2015	12
2		31	Collapsed in 2018, and disappeared from the high street (for now)	13
3		25	Collapsed in 2013, and disappeared from the high street	14
4		18	Mostly ex-99p Stores that were briefly converted to Poundland, then closed	
5		16	Collapsed in 2017, but brand resurrected by new owners	15
6		14	Collapsed in 2011, with most sites acquired by Poundstretcher	
7		12	Collapsed in 2012, but business acquired and built back up by EWM Group	
8		10	Business still trading, but retail estate rationalised	
9=		8	Collapsed in 2011, but business built back up under new ownership	
9=		8	Business still trading, but some stores closed via 2018 CVA	16

- In fact, our tracking over the last decade has recorded over **350 former occupants** across the Woolworths estate – in other words, businesses that have traded from an ex-Woolies site at some point since 2009, but that don't any more.
- Not surprisingly, the retailer to have occupied, and then disappeared from, most Woolworths sites is **99p Stores** (including Family Bargains), accounting for 64 of those 350. The majority of those sites were converted to Poundland upon its takeover of 99p Stores in 2015.
- Among the top ten former occupants, **Poundworld** (31), **Ethel Austin** (25) and **Alworths** (14) are the only retailers to have disappeared from the high street completely – though the Poundworld brand is expected to be resurrected in the coming months.<sup>17</sup>
- Barring the unexpected collapse of a major occupant of ex-Woolworths stores, we would expect the number of currently vacant sites to **stabilise** again in 2019, with Iceland and Poundstretcher among the retailers known to be acquiring some – often as yet unannounced – former Poundworld and TOFS sites.

## OLD WOOLIES SIGNAGE



Rear of ex-Woolworths, Holyhead (store #806) in September 2018

From their vertical white tiles to the ubiquitous black-granite stall risers, former Woolworths buildings offer no shortage of architectural clues to their past.

Indeed, some of the richest stores from a heritage point of view are those that Woolworths vacated years ago, and that therefore missed out on later redevelopments that would have removed distinctive features.

For example, long-closed stores in Clay Cross<sup>18</sup>, Doncaster Waterdale<sup>19</sup> and Benwell<sup>20</sup> are among those that (last time we checked) have largely intact entrance mosaics, while the Glasgow Charing Cross branch, which shut half a century ago, still has an incredible 'F W Woolworth & Co. Ltd' sign around the side.<sup>21</sup>

Traces of old Woolworths lettering also regularly reappear when subsequent occupants replace their signage or close down – as seen in Peterlee in 2012, after Poundland departed.<sup>22</sup>

However, if you're looking for an in-situ modern Woolworths sign that was still in use at the time of the retailer's collapse, your options are dwindling:

- **Kidderminster** (never occupied) – rear sign<sup>23</sup>
- **Holyhead** – rear sign, but probably not for long – the building is earmarked for demolition
- **Margate** (never occupied) – main signage<sup>24</sup>
- **Longton** (never occupied) – main and side signage
- **Bo'ness** – damaged sign at rear, following 2017 fire.<sup>25</sup>

Alternatively, head to the Ludo Lounge bar in Southbourne, Bournemouth, where the redevelopment of the ex-Woolworths has incorporated an old Woolies sign from the building into the roof terrace (see page 11).

## SUBDIVISION OF PROPERTIES

- At least 86 former Woolworths properties – 11% – have been **permanently divided up** to accommodate more than one new occupant.
- Of those, most (60) have been **divided into two**, though in one case – Birmingham Small Heath – the 52,187 sq ft total area of the former Woolworths has been split **seven** ways.
- Four ex-Woolworths properties that were initially subdivided have subsequently been **merged** back together again, to accommodate the needs of new or expanding occupants.
- For the purposes of this research, a **subdivided property** is a former Woolworths that has been permanently carved up to accommodate more than one occupant. Typically, these divisions have involved splitting the frontage into two or more sections; hiving off different floors (such as creating space for a first-floor gym above ground-floor retail); or, in the case of some shopping centres, splitting an ex-Woolworths into front and back sections facing different malls or streets.
- Hence, two businesses trading under a **dual fascia** but still within a single space – such as Poundland and Pep&Co – are not included within the count of subdivided properties.



Heron Foods initially took the left-hand two thirds of the ex-Woolworths in Ashington (store #229), before then reunifying the ground floor in 2018 by expanding into the rest

## OUT-OF-TOWN LOCATIONS



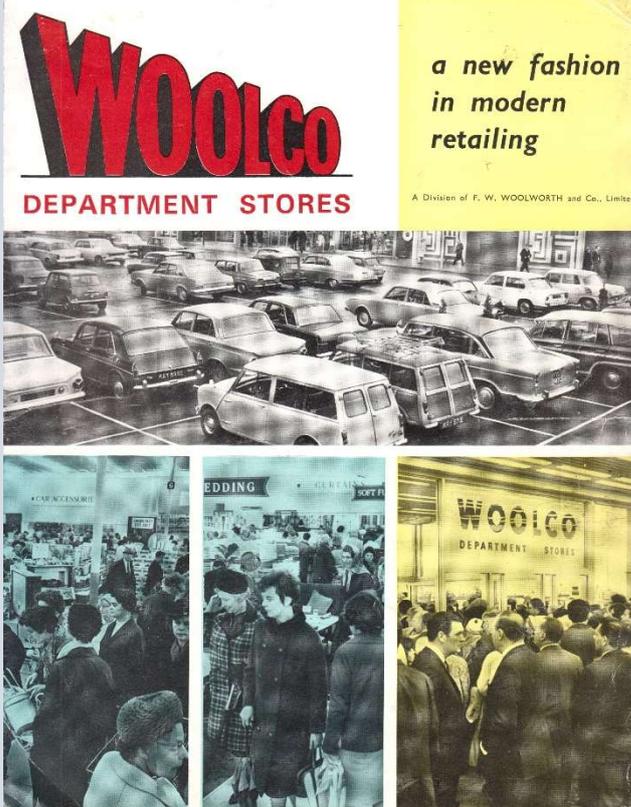
Out-of-town Woolworths site – previously a Big W – in Newark-on-Trent (store #1245), now subdivided four ways

- Though it's fair to describe Woolworths as a “high-street retailer”, it did still have **18 retail park or retail shed stores** at the time of its collapse, 16 of which had been built in the late 1990s and early 2000s as Big W.<sup>26</sup> Historically, though, Woolworths traded from quite a few more out-of-town locations (see panel, right).
- These 18 retail park and retail shed sites formed just 2% of Woolworths' 807-strong store count at the time of closure, but accounted for 11% of the chain's total **retail sales area**, and 12% of the annual **rent bill**.
- Given the large size of the 16 ex-Big W stores – all at least 31,000 sq ft – it's not surprising that seven have been **divided up** to accommodate more than one new occupant. The ex-Big W in Newark, for instance, now houses Home Bargains, Boots, Next and Peacocks.
- Only four different retailers have managed to fill one of the 16 ex-Big W sites **by themselves**: Boundary Mill Stores (1 site), Tesco (2), Asda (2)<sup>27</sup>, and The Range (4).



After several years of vacancy, The Range took over the whole of the ex-Woolworths at Edinburgh Milton Link (store #1208)

## AN OUT-OF-TOWN PIONEER



Cover of a late 1960s brochure championing Woolco

Woolworths pioneered the hypermarket concept in the UK when its then US owners brought Woolco “department stores” to Britain in 1967.<sup>28</sup> This concept of huge destination stores, with ample free parking, was totally new to British shoppers at that time.

All 14 Woolcos were disposed of by 1986, with some performing a similar function today as branches of Asda.

In 1999, however, Woolworths' then owner Kingfisher Group made a return to large out-of-town sites with the launch of Big W, a concept combining products from Woolworths with those of Kingfisher's other retail fascias: Comet, B&Q and Superdrug.

Unfortunately, the demerger of Kingfisher's various businesses in the early 2000s meant that existing Big Ws had to be reworked to become unusually huge branches of Woolworths. Eight of 24 ex-Big W sites were already disposed of to Asda, Tesco or M&S in the mid-2000s, while the rest – sometimes downsized, and now bearing a normal Woolworths fascia – traded until the company's closure in 2008-09.

With a sales area of 80,827 sq ft, the Rotherham Catcliffe ex-Big W was easily the biggest Woolworths at the time of the firm's collapse, while the slightly smaller Stockton Portrack Lane branch was the most expensive, with an annual rent bill of £1,339,307.

## NON-RETAIL USES



The Ludo Lounge bar on the site of Southbourne's ex-Woolworths (store #606) incorporates a fragment of its predecessor into the design of the new roof terrace

- Of the 807 Woolworths locations vacated after its collapse, the vast majority – 738 (91%), excluding those that are currently empty – remain entirely or partly in **active retail use**.
- We are only aware of 22 sites that have been wholly turned over to **non-retail uses**, and a further 23 that are now non-retail in part.
- **Restaurants, bars and pubs**, including five Wetherspoons, occupy a surprisingly small number of ex-Woolworths sites – just 15 in total.
- Three Woolworths sites in the South East – Southsea, Sheerness and Rye – have become **libraries**. All three combine library provision with a council customer service point on the high street.



A Wetherspoon pub occupies the ex-Woolworths in Prestwick (store #694)

- At least nine former Woolworths sites (1%) are now **gyms**; five of those occupy upper floors used as stockrooms and staff areas in Woolworths' time.
- Other **non-retail uses** across the ex-Woolworths estate include offices, play spaces, an accountant, a training centre, a function room, a gallery space, a nursery, a health centre, and two dentists.
- Though there is much debate at the moment about repurposing vacant retail space for **housing** – a change advocated by town-centre champion Bill Grimsey<sup>29</sup>, among others – there is currently very little evidence of this happening across the former Woolworths estate.
- We are aware of only five Woolworths sites where **housing** has been, or is being, created above retained ground-floor retail, though several others include residential as part of comprehensive redevelopments that are either in progress or planned. Seaton and Merthyr Tydfil, for example, have seen **unused upper floors** converted to apartments, while the Mill Hill store has been extended upwards to accommodate housing on two **new-build floors**.



After a spell as Ethel Austin, the ex-Woolworths in Shaw, Oldham (store #1025) became a dentist's. A different dental practice has taken over the premises since this photo was taken in 2015



The former Woolworths (and previously Big W) in Filton (store #1223), pictured in 2011. The property was subsequently demolished and replaced with a purpose-built Asda store

## REDEVELOPMENTS

- Just six former Woolworths sites (fewer than 1%) have been **demolished** in the last decade – four to enable replacement retail developments (Hoddesdon<sup>30</sup>, Bracknell<sup>31</sup>, Blackburn<sup>32</sup>, Filton<sup>33</sup>), and two more (both in progress) for mixed-use schemes comprising shops and housing (Dunstable, South Oxhey).
- At least another four sites are **earmarked for demolition** and redevelopment, including West Ealing (apartments), Holyhead (hotel), Corstorphine in Edinburgh (shops and apartments), and Tavistock (replacement retail).

## WORST LUCK?

- Hartlepool and Scunthorpe had the misfortune to have their large Woolworths sites taken over by **BHS** – which itself collapsed and closed in 2016, with the biggest loss of jobs (11,000) and retail floorspace since Woolworths.
- However, BHS's major investment in both locations was not wasted – **B&M** promptly took over the glitzy Hartlepool site, while Scunthorpe's is being turned into an **indoor market**.



The former Woolworths in Hartlepool (store #322) as BHS in 2012 and then as B&M in 2018



Burslem in Stoke-on-Trent has, somewhat unhelpfully, been badged the “empty shop capital” of Britain<sup>34</sup>, yet the November 2018 opening of a new restaurant, Sapphire Fine Dining, in the former Woolworths – following the departure, first, of Poundstretcher, and then Asian supermarket Quality Bazaar – demonstrates an important investment in the high street, and one independent’s evident belief in the town’s potential

## CONCLUDING THOUGHTS

### THE HIGH STREET ISN'T DEAD...

Amid challenging times for retail right now – arguably the most challenging since 2008, when Woolworths collapsed into administration – the findings from the #Woolies10 research paint a more positive picture of the high street than many might be expecting.

A decade on from Woolworths’ closure, it is remarkable that nine out of ten of its former premises remain in active retail use, as new occupants have arrived to fill the gap left by Woolies, or to offer something new and distinctive to the communities that Woolworths previously served.

The current high level of retail occupancy is especially impressive given the turnover that Woolworths’ former estate has seen to date, with names like 99p Stores, Alworths and Ethel Austin appearing and then disappearing, and new businesses arriving in turn to take their place.

Indeed, as the report has highlighted, over a third of former Woolworths sites are already on to their second (or more) post-Woolies occupant. It’s a far cry from Woolworths itself, which had occupied many of its sites for decades, and the oldest of all – in Croydon (store #12) – since 1912.

### ...AND NOR IS VARIETY RETAILING

Within the ex-Woolworths estate, the dominance of variety retailers like Poundland, B&M and Poundstretcher – all of which offer something not dissimilar to Woolworths – is particularly notable.

It suggests that Woolworths’ problem was not so much its eclectic range, but a failure, in its latter years, to deliver great value to the customer – being neither the cheapest nor the best quality – coupled with onerous leases on properties that Woolworths had, in many cases, formerly built and owned.

It’s a story we see in retail all the time: a much-loved brand, once exciting and brave, taking its eye off the ball as nippier, modern competitors emerge – and eventually finding itself in a situation that it’s almost impossible to come back from.

In contrast, the new generation of variety retailers, like Home Bargains or Wilko, not only have a very clear value proposition that appeals to the savvy consumer, but also tend to benefit from shorter and more attractive lease terms than Woolworths had in its latter days.

Woolworths not only had an annual rent bill of £125m at the time of its closure, but, in many cases, was tied into leases that were not due to end until the 2020s or beyond.

## BUT WE CAN'T PREVENT CHANGE

Given that the day-to-day consultancy work of CannyInsights.com is all about championing and supporting retailers – and working to create successful places – you would hardly expect us *not* to be optimistic about the prospects for the high street.

Indeed, the #Woolies10 research highlights many successful businesses – a lot of them multiples, but including some independents, too – who are still making a success of bricks-and-mortar retail and who are, even now, seeking and opening new premises.

Nevertheless, we should not underestimate the scale of change taking place on the high street, which will continue to present both opportunities and challenges.

Retail has always evolved, and will forever keep doing so. However, there is a sense that the pace of change has quickened in the last few years, as an unpalatable combination of factors – high rents and business rates, the growth of online retail, competition from out-of-town retail parks, and subdued consumer confidence – pick off those businesses that are not at the top of their game.

While still low, the number of currently vacant Woolworths sites is notably higher than when we took a similar snapshot from our research data five years ago. Just in 2018, the demise of Poundworld has resulted in a clutch of former Woolworths sites becoming empty again, while

Carpetright and The Original Factory Shop are among the post-Woolies occupants that have trimmed some underperforming stores using the controversial CVA process.

## A MORE MIXED-USE FUTURE

Though some of these sites have already been refilled by other retailers – with chains like Iceland and Poundstretcher seizing the opportunity for expansion – it is likely that the next decade *will* see more former Woolworths properties being repurposed for functions other than retail.

To date, less than 6% of the ex-Woolworths estate has been turned over to non-retail uses. However, as town and city centres increasingly look to reinvent themselves as busy, multi-functional places – rather than merely shopping destinations – we will likely see more creative reuse that not only makes empty space productive again, but also helps build the vibrant communities needed to sustain the retained retail offer.

**Nevertheless, creative and well-run businesses that give customers a good-quality experience, and the products and services they want, will continue to be best placed to navigate the changing high street, and to seize any future opportunities – just as many occupants of old Woolworths sites are doing now.**



Natural and organic food shop Earthfare in Glastonbury (store #853) is among the independent businesses that have made a success of ex-Woolworths sites by being marketing savvy and tailoring their offer to what the local community wants and needs



Former Woolworths in Longton, Stoke-on-Trent (store #258) in December 2018 – one of only four stores never to be reoccupied, and one of just two with its main Woolworths signage still intact

## METHODOLOGY

Through our tracking research over the last ten years, we have sought to provide not only the most robust review yet of what Woolworths stores are now, but also a detailed understanding of the hundreds of intervening uses, thereby shedding light on how Britain's retail centres are changing.

Providing a detailed account of how we have carried out the research ensures that the strengths and limitations of our methods are transparent, and lets those who are reading and reporting upon the research draw their own conclusions about its accuracy and rigour.

Undertaking this research is more complex than you might imagine; the key stages involved are described below.

### CLARIFYING THE LOCATIONS

As noted in the Scope section (page 5), the research has looked at the 807 standalone stores from which Woolworths was trading at the time of its collapse.

Fortunately, the excellent Woolworths Museum website makes available a full store list from late 2008 in spreadsheet format<sup>35</sup> – produced just before Woolworths fell into administration – listing all these branches and their addresses, as well as the seven stores that had just been closed and sold to Tesco (and which are therefore excluded from the research).



*Divided between several occupants, and with no visual clues to its past use, Doncaster's former Woolworths (store #193), in the Frenchgate shopping centre, demonstrates the complexity of some locations. The two-level store was originally reoccupied mostly by Clas Ohlson, with Deichmann and Wilko (extending its existing store) also taking first-floor space. After Clas Ohlson closed, Toys R Us, and then The Entertainer, took the newly released first-floor space, with TK Maxx moving into the ground-floor section.*

We also procured a further spreadsheet, made available to prospective occupants of former Woolworths stores, which again includes the address details of each store alongside extra information such as square footage and rent.

In addition, we had access to Woolworths store lists from 1957, 1972, 1993 and 1995, which are useful for identifying historic Woolworths locations, but less relevant when focusing on the 2008 estate.

Having obtained the addresses of all the properties being researched, the next step was not as simple as merely Googling those addresses to see what they had subsequently become.

For example, around half of Woolworths stores straddled multiple building numbers – such as 232-240 High Street in Gateshead – meaning that the addresses that are cited in online sources and in Woolworths' own records often include multiple variants.

Other potential confusion occurs when stores are listed in different places with both shopping centre and street addresses, or where shopping centres have changed their name since Woolworths' occupancy (such as ShoppingCity

in Runcorn, which was still known as Halton Lea at the time of Woolworths' demise).

Additionally, the subdivision of ex-Woolworths properties can result in different building numbering entirely, particularly where some of those newly created units front different streets. At the same time, subdivision can also result in more than one business with the same address, such as where upper or basement floors have been split off from the ground-floor retail use.

Ultimately, the only way to ensure that the right properties are being tracked is to use a combination of site visits and detailed desk research to identify all the premises that Woolworths was trading from when it collapsed.

Over the course of our project, we have visited 470 of the 807 ex-Woolworths locations in person at least once. Other locations have been clarified using Google Street View (which, conveniently, began capturing data in 2008, just before Woolworths' demise)<sup>36</sup>, and by referencing pre-2009 documents such as letting particulars, shopping centre mall guides and planning applications. Input from people familiar with the premises, often communicated to us via email or Twitter, has also proved invaluable.



Pictured here in 2014, Burnley's ex-Woolworths (store #160) has seen the joint highest number of superseded post-Woolworths occupants, with five. After housing a YMCA charity shop (in the whole unit), followed by Peacocks and then Poundworld in one half, and 99p Stores and then Poundland in the other, it currently accommodates Wilko in the ex-Poundland and a soon-to-open Iceland in the former Poundworld

## IDENTIFYING AND TRACKING OCCUPANTS

With the precise location and extent of all the former Woolworths sites now pinned down, the next stage has been to track and record the subsequent occupants of those premises.

Having initially maintained informal records, we created our own database of all the stores in 2010. Since then, we have been updating it every time we have become aware of a new occupant, gathering information through our own site visits, by monitoring news stories and social media, and through our own Twitter followers alerting us to changes.

Since its introduction in 2014, Google's historical Street View function (where users can click the clock icon to view archived imagery captured on previous visits) has also been helpful for verifying intervening uses, though the gaps between Google's cycles mean, of course, that some of the shorter-term occupants are never captured.

In addition, a full check of all 807 sites was undertaken in 2013 prior to the fifth anniversary of Woolworths' collapse, and again between October and December 2018 for the purposes of this report.

Many multiple retailers maintain online store locator tools, which make it relatively simple to check that a store in a given location continues to trade. Even here, however, there is a need for caution, as the information provided is not always wholly up to date; for example, we found a closed Iceland store still listed on the retailer's own

website, and a reopened Poundstretcher that was *not* on that company's store finder (as of 29 December 2018, that still remains the case, despite us alerting both retailers to the error via Twitter).

For smaller independent businesses, many of which have a more limited online footprint, it can be hard for us (or, indeed, potential customers) to verify that they are still trading; in some cases, the only way to be certain is to pay a visit, or pick up the phone! Google Street View provides some clues, but its imagery is usually, at best, several months behind the present time, and tends to exclude shopping centres and pedestrianised streets.

Similarly, the presence of a company website does not mean that a business is still live; often these sites hang around long after a business has closed.

Hence, where a visit is not possible, we typically triangulate various desk sources to ascertain whether a business logged previously continues to trade (and, if not, what is there now), or to identify a new occupant of a property (or section of property) that we previously recorded as empty:

- **Google search** – business details shown to the right of search results (linked to Google Maps and Google My Business) can identify when a business is “permanently closed”, though details are not always up to date.
- **Google reviews and business photos** – the dates when reviews and photos were posted by Google users

give clues to whether a business is still trading; reviews sometimes also state if a particular shop is now closed.

- **Shopping centre websites** – mall plans and lists of tenants are often a useful source, though not all shopping centres are good at keeping this information up to date. However, shopping centre websites are often less useful for independent businesses, which tend instead to occupy former Woolworths sites on high streets and suburban precincts.
- **Social media accounts** – the mere existence of a social media account for a business is no proof that it still exists, but the presence of very recent tweets or Facebook posts does provide confirmation. If a Facebook account is not actively posting, recent reviews from users can provide that evidence instead.
- **Social media searches** – Twitter and Facebook both have powerful search tools that can be used to bring up references in people’s public posts to businesses that have opened or closed. At the same time, many users have shared useful updates about their local Woolworths with us on Twitter using the #Woolies10 hashtag.
- **Commercial property listings** – most empty properties are marketed by an agent, so finding a live listing online can help confirm that it remains vacant. However, some caution is needed; listings sometimes remain live even after a property is let, and particulars in PDF format often hang around online (and in search

results) even once the accompanying website listing is deleted and the property long reoccupied.

- **Planning applications** – applications for change of use or for advertising consent can be useful in identifying new occupants, and are available online for every local authority.
- **Online directories** – a listing on a site like Yell does not prove that a business is still active, but there are a good number of independent occupants of former Woolworths sites that (inexplicably) do have a presence in these directories while at the same time being invisible on social media and Google Maps.
- **Direct contacts** – in a handful of cases, if no other sources have provided the required information, we have contacted businesses directly to verify that they are still live, or checked with local business associations or other organisations. Thank you to Visit Batley, Cinderford Town Council and New Milton Independents for their help in this regard.

## UPCOMING USES

In a few instances, former Woolworths properties are currently vacant but have a confirmed occupant coming soon – such as Burnley, where Iceland is to move into the section of the ex-Woolworths site that was most recently occupied by Poundworld. In these cases, we have recorded the impending occupant, rather than counting the unit as vacant.



With few clues online to verify its current use, we visited the Heanor ex-Woolworths (store #549) in person in December 2018. This confirmed that, after spells housing a charity shop and a furniture shop, a photography studio is now trading from the upstairs, while the ground floor appears to be being converted into units for other small businesses

## ABOUT GRAHAM AND CANNYINSIGHTS.COM



Graham filming with BBC Look North outside the former Woolworths in Gateshead High Street (store #154). Initially taken over by Poundland, the property has housed a gallery space and studios for The NewBridge Project following Poundland's relocation to new premises nearby

Described on BBC Look North as “the region’s best-known retail expert”, Graham Sout BA (Hons) MA FIPM, the owner and founder of CannyInsights.com, is a consultant, blogger and media commentator whose experience and interests straddle retail, marketing and the web.

In setting up CannyInsights.com, Graham’s focus is working with retailers, shopping centres and places to help them improve their offer and marketing – whether that’s through understanding their customers better, communicating the right messages on social media, or improving the customer experience.

Current projects include ongoing landlord-funded work in Chester-le-Street, County Durham, aimed at promoting the town as a place to shop and visit, and providing its independent traders with marketing and mentoring support to help them trade more successfully.

Graham is known for having his “ears to the ground”, and for regularly visiting, observing, photographing and reporting on retail centres across the country. In fact, Graham has clocked up visits to well over 600 different

retail locations across England, Wales, Scotland and Northern Ireland over the last ten years, building up a unique knowledge bank and a library of 70,000 original photographs of high streets, shopping centres, store interiors and shopfronts.

All this knowledge and material also feeds into Sout’s Retail Report, a regular update, available by subscription, that provides a detailed picture of what’s going on on the UK high street.

Graham has over fifteen years’ research experience, in both business and academia, and across a range of sectors. Prior to setting up his own consultancy, Graham held academic research roles at the Centre for Northern Studies and the Centre for Public Policy at Northumbria University, and spent four years, until August 2010, as Senior Research Executive at Newcastle-based market research agency Marketwise Strategies.

Before his research career, Graham trained as an architect and planner at the University of Sheffield, which has helped nurture his longstanding passion for places, and his keen eye for design and detail.

Outside of research and consultancy, Graham is a regular and respected commentator and writer on retail, the high street, ecommerce, and digital marketing, appearing regularly on TV, on radio, and in the press, and is also a regular speaker at conferences, seminars and shows.

Graham has built up an extensive network of retail-related contacts, including key influencers within large or expanding store groups, and 2,500 followers on professional network LinkedIn, ensuring that he is well plugged in to all that is happening in the retail industry.

Thanks to his @soul Twitter account – which currently has over 12,000 followers, and typically gains more than 200,000 monthly impressions – Graham was highlighted as the top retail person in The Journal’s North East Twitterati for three years in a row.

In 2016, he was also named as the UK’s 12th most influential retail person on Twitter in work for Retail Week by ‘social listening’ company Listed – just two places behind Mary Portas – and retained his top-20 placing in the 2017 update. In December 2017, retail management software company Vend ranked Graham at number 16 in

its list of the Top 100 Retail Influencers for 2018, covering individuals on Twitter in both Europe and North America.

In 2018, Graham’s influence and profile was recognised by his election as a Fellow of the Institute of Place Management, a respected professional body based at Manchester Metropolitan University. Fellow status is only available “to those that have reached a very high level of personal and professional achievement, within the industry” and who “hold a higher degree, have at least six years’ practical experience, and can demonstrate that they have had a considerable impact upon place management”.

Meanwhile, Graham also runs CannyInsights.com’s online marketing arm, CannySites.com, which owns and manages five successful and content-rich directory websites. These sites showcase and work with hundreds of businesses across the fashion, property, interiors, gardening and travel sectors, and promote those sites and retailers across a network of social media channels.

**Do get in touch if you think we can help your place or business – we’ll be delighted to hear from you.**



Graham in Chester-le-Street Front Street

## ENDNOTES

- <sup>1</sup> Based on the 115,000 sq ft sales area of the recently opened Cheltenham branch: <http://www.johnlewispartnership.co.uk/media/press/y2015/press-release-9-october-2015-john-lewis-announces-new-store-for-cheltenham.html>.
- <sup>2</sup> <https://www.theguardian.com/business/2017/apr/18/did-you-lose-your-job-when-bhs-went-into-administration>.
- <sup>3</sup> <http://news.bbc.co.uk/1/hi/7751064.stm>.
- <sup>4</sup> <https://uk.reuters.com/article/uk-woolworths-tesco/woolworths-sells-up-to-9-store-leases-to-tesco-idUKTRE4992PM20081010>.
- <sup>5</sup> <https://www.thisismoney.co.uk/money/markets/article-1632894/Surprise-as-Woolies-chief-heads-for-the-exit.html>.
- <sup>6</sup> For the purposes of the research, we have adopted Clare Bailey's definition of small independent retailers as "businesses with very few retail outlets, usually a single store, with no headquarters or centralised management... Owner-operated and usually run from the shop (or from one of the shops where there are many)". This definition deliberately excludes a business like Boyes, which, although independent and family owned, is also now a sizable chain that has a head office in Scarborough and over 60 UK stores (including three in former Woolworths premises). For the full definition, see <https://retailchampion.wordpress.com/2011/06/13/what-is-an-independent-retailer/>.
- <sup>7</sup> Total includes Dealz on the Isle of Man. At least 71 of the Poundland sites are co-branded as Pep&Co.
- <sup>8</sup> Total includes B&M, Bargains and Home Store fascias, but excludes B&M Express, which is a rebranded Heron Foods.
- <sup>9</sup> Includes stores opened under Poundstretcher's Bargain Buys fascia since 2018. Some of these stores previously traded under Poundworld's Bargain Buys fascia, which Poundstretcher appears to have resurrected without having officially acquired the brand.
- <sup>10</sup> Includes two stores branded as "B&M Express".
- <sup>11</sup> Combined total for all fascias, including Tesco Express, Tesco Metro, Tesco, and Tesco Extra.
- <sup>12</sup> Includes Family Bargains. As of December 2018, 51 former 99p Stores and Family Bargains in ex-Woolworths continue to trade under a Poundland fascia.
- <sup>13</sup> Total includes stores that traded under Poundworld's Discount UK and Bargain Buys fascias.
- <sup>14</sup> Figures includes stores trading under a dual Ethel Austin and Au Naturale fascia, as well as the experimental Life & Style format.
- <sup>15</sup> Under the new ownership of Saturn Trading Company, Store Twenty One was trading from 15 stores as of December 2018, of which three are ex-Woolworths (Houghton-le-Spring, Newtown, Belle Vale).
- <sup>16</sup> The Original Factory Shop leapfrogged Poundstretcher (7) in late December 2018, as it exited two further sites (Nailsea and Wells) that it acquired after Woolworths' demise.
- <sup>17</sup> <https://www.insidermedia.com/insider/national/poundworld-deal-could-bring-brand-back-to-high-street>.
- <sup>18</sup> <https://twitter.com/soult/status/1003308601128181760>.
- <sup>19</sup> <https://twitter.com/soult/status/613668834164277249>.
- <sup>20</sup> <https://twitter.com/soult/status/456468173475160064>.
- <sup>21</sup> <https://twitter.com/soult/status/766335060144422913>.
- <sup>22</sup> <https://twitter.com/soult/status/466253467817099265>.
- <sup>23</sup> <https://twitter.com/RichardEarp14/status/1074305712975724544>.
- <sup>24</sup> [https://twitter.com/adm\\_bn/status/1062266715143393280](https://twitter.com/adm_bn/status/1062266715143393280).
- <sup>25</sup> <https://twitter.com/Luciam91/status/1073996530036686849>.
- <sup>26</sup> For the purposes of this analysis, we have included the 16 ex-Big W stores that were still trading as Woolworths at the time of its collapse – all of which had a retail sales area of over 31,000 sq ft – plus two additional, but much smaller, retail park stores in Shepton Mallet and Derby.
- <sup>27</sup> One of these Asda sites is Filton, where the former Woolworths was demolished, and a new building constructed on the same site.
- <sup>28</sup> <http://www.woolworthsmuseum.co.uk/1960s-outoftown.htm>.
- <sup>29</sup> <https://www.theguardian.com/business/2018/jul/04/high-streets-must-stop-relying-on-retail-says-expert-review>.
- <sup>30</sup> <http://www.hilldemolition.com/case-studies>.
- <sup>31</sup> <https://www.getreading.co.uk/news/business/oxfam-shop-closes-final-time-4188740>.
- <sup>32</sup> [http://news.bbc.co.uk/local/lancashire/hi/people\\_and\\_places/newsid\\_8687000/8687059.stm](http://news.bbc.co.uk/local/lancashire/hi/people_and_places/newsid_8687000/8687059.stm).
- <sup>33</sup> <http://www.southwestbusiness.co.uk/commercial-property/07082013075516-30-000-sq-ft-filton-asda-supermarket-due-to-open-in-november/>.
- <sup>34</sup> <https://www.itv.com/news/2018-08-23/shopping-end-of-the-high-street-tonight/>.
- <sup>35</sup> <http://www.woolworthsmuseum.co.uk/WoolworthStores-FullList.html>.
- <sup>36</sup> <https://www.theguardian.com/business/2009/mar/19/google-street-view-uk>.