Observatoire du commerce 2011 | Overzicht van de handel 2011 | Retail Observatory 2011

Région de Bruxelles -Capitale | Brussel Hoofdstedelijk Gewest | Brussels-Capital Region

Retail Observatory 2011

Contents

1 Introduction

This edition of the Retail Observatory analyses the data from two exhaustive retail surveys conducted in the Brussels region, dating from 1997 and 2009 respectively, and one survey carried out in 2005 which was limited to the retail node corridors forming the main commercial network in the region, as defined by the regional land use plan (PRAS).

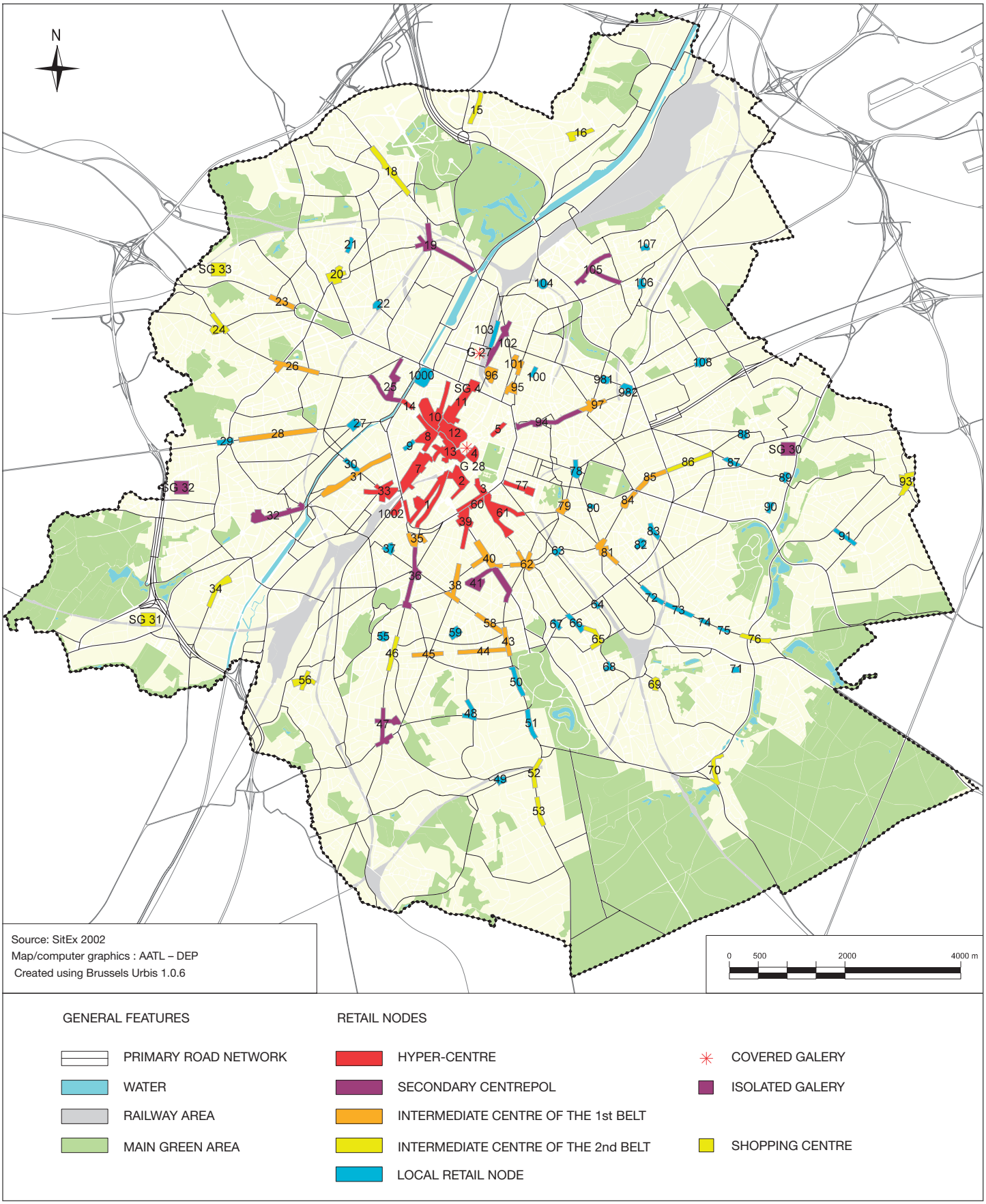
To do so, it uses the hierarchy of retail nodes and the typologies of commercial functions as drawn up by Stratec at the time of the first Observatory study.

This publication will address in turn:

- changes to all retail functions during the 12-year period from 1997 to 2009, both for retail businesses grouped together in commercial nodes and for those situated in the gaps between them, known as stand-alone stores.
- the changes in retail during the period 1997-2005 and 2005-2009, two very contrasting periods, solely in the retail node corridors defined by the PRAS
- retail in the Brussels region in 2009, in terms of the status of traders and vacant and occupied surfaces.
  This final part uses new information from the data base of Locatus, which conducted the 2009 survey.

Typology of retail network

Brussels-Capital Region



List of PRAS-defined retail corridors, see annex 1

2. Changes in the retail supply in the Brussels region between 1997 and 2009

2.1. Turnover of retail premises between 1997 and 2007

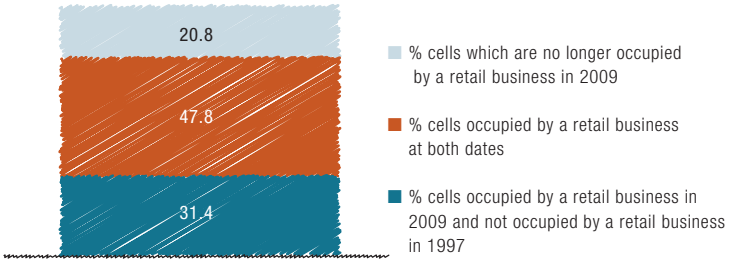
Surveys of retail businesses between 1997 and 2009 highlight the very considerable changes in the use of retail units. These changes relate both to the arrival of a new retail activity in an existing shop or in a new retail cell, and to the closure of a shop which is not taken over by a new retail activity.

2.1.1 Turnover in all retail cells in the Brussels-Capital Region

If we compare the total number of cells occupied by a retail business in the 1997 and 2009 surveys, there are some significant differences:

- only 47.8 % of these cells are still occupied by a retail activity in 2009
- 31.4 % are no longer occupied by a retail activity
- 20.8% were not so occupied in 1997.

Graphic 1
Turnover in the occupation of all retail cells in the Brussels-Capital Region between 1997 and 2009



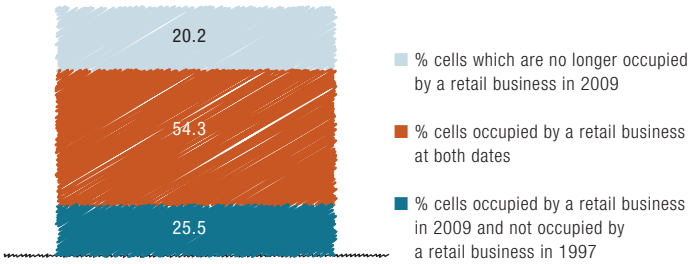
2.1.2. Turnover within the PRAS-defined retail corridors

The situation is more stable in the PRAS-defined retail corridors[1]: the 2009 survey only counts 6.5% fewer retail cells than the 1997 survey. This percentage would certainly be higher if the retail galleries adjoining the corridors were included, but these were excluded from the 1997 survey.

If we compare the total number of cells occupied by a retail business in retail node corridors in the 1997 and 2007 surveys, we note that:

- only 54.3 % of these cells are still occupied by a retail activity in 2009
- 25.5 % are no longer occupied by a retail activity
- 20.2% were not so occupied in 1997.

1 Land use plan (PRAS)



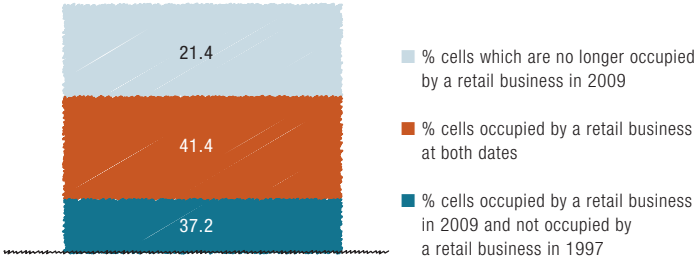
Graphic 2
Turnover in the occupation of retail cells situated in the PRAS corridors in the Brussels-Capital Region between 1997 and 2009

2.1.3. Outside the PRAS-defined retail corridors

It is therefore outside the corridors that the turnover is greatest.

If we take the total number of cells occupied by a shop outside retail corridors in the 1997 and 2007 surveys, we note that:

- only 41.4 % of these cells are still occupied by a retail activity in 2009
- 37.2 % are no longer occupied by a retail activity
- 21.4% were not so occupied in 1997.



Graphic 3
Turnover in the occupation of retail cells situated outsider the PRAS corridors in the Brussels-Capital Region between 1997 and 2009

Clearly, retail activities are more sustainable in the longer-term within these nodes than outside them.

We will consider these changes at the different levels of the network of retail node corridors below.

2.2. Changes at the different levels of the commercial network in the Brussels region

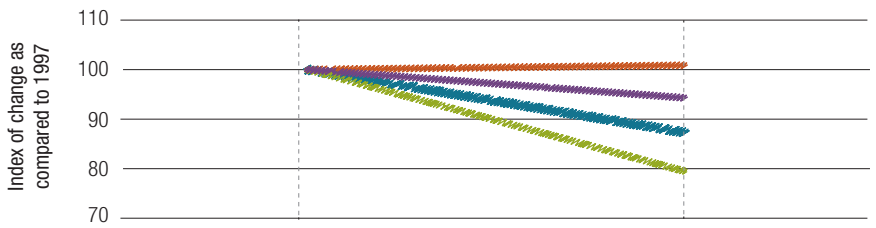
The study previously published by the Retail Observatory[2], devoted to the development of retail in Brussels between 1950 and 1997, revealed a reduction of almost a half in the number of retail outlets between these two dates. The 2009 data demonstrate that this decline has continued.

However, it does not affect all the different levels of the commercial network in the Brussels region equally.

Two observations stand out at once:

- shopping centres, which have centralised management, are more durable over time than spontaneous retail areas
- retail node corridors do better than shops outside the corridors or free-standing stores.

Graphic 4
1997-2009
BCR – Index of change in the number of retail businesses at the different levels of the retail network in the Brussels region



	1997	2009
RNC [3]	100,0	94,3
Shopping centres	100,0	100,9
ORNC [4]	100,0	79,5
Total	100,0	87,4

2.3. Mobility of retail functions between 1997 and 2009 in the Brussels region

2.3.1. Mobility in and outside retail node corridors

The matrix of commercial cells in 1997 and 2009 enables us to compare the use of every cell at these two dates. It records the creation, disappearance or relocation of retail activities. The only aspect which it does not record is the change of store brand or owner, where the new activity is identical to the old.

What interests us here is the percentage of cells occupied by the same activity in 1997 and in 2009. This percentages differs for cells in a retail corridor and those located outside a corridor. Here again, there is greater stability for functions located within a corridor.

	% cells with the same use in 1997 and 2009
Within retail node corridors	34,1
Outside retail node corridors	31,1
Within + outside retail node corridors	32,6

2
Igeat (ULB) 2007 Retail Observatory – *Half a century of changes in retail in Brussels*
3
RNC – Retail node corridors
4
ORNC –Outside retail node corridors

2.3.2. Mobility by different retail functions

Stable occupation also depends on the business type. It does not necessarily mean that this function type is experi-encing growth, but that there is greater inertia.

The greater or lesser stability of a given function depends on several factors, including, without doubt, the restructuring of some segments, changes in consumer values and behaviours, the regulations which govern some professions, the amount of technical equipment required for the exercise of certain professions or the existence of specialist districts.

Some examples will suffice to demonstrate the very great diversity in the turnover of different retail activities.

Activities	% cells in retail node corridors with the same use in 1997 and 2009
crockery and tableware	4,5 %
decorative furnishings	4,7 %
estate agency	10,6 %
DIY centre	12,5 %
animal grooming	20,0 %
white goods, kitchen equipment	20,0 %
multi-purpose	31,0 %
cheesemongers, dairy products milk, delicatessen	31,0 %
clothes, lingerie	39,4 %
antiques, second-hand goods	44,1 %
hairdressers	47,1 %
restaurant	50,2 %
butcher, charcuterie	54,8 %
fuel and service stations	68,2 %
pharmacy, herbalist	81,0 %

Obviously, retailers are constantly looking for the best location. Increasingly frequently, they are tenants, they are more mobile and they seek to reconcile the lease cost of commercial premises with the potential profitability of its location, which depends on several factors such as population, incomes, accessibility, footfall etc.

Retail activity is not a long quiet river.

But what, more specifically, are the commercial activities most affected by the changes in consumption in retail corridors and stand-alone stores?

2.3.2.1. Functions experiencing growth

Some functions are experiencing growth both within and outside retail corridors.

Retail functions	Changes within retail node corridors 1997-2009	Changes outside retail node corridors 1997-2009
mobile telephony	140	30
DIY centre	10	28
health foods	15	16
builders' merchants	19	30
wool and hosiery	5	4
IT products (retail)	86	14
capital goods and household maintenance	19	44
cafeteria, snacks, fast-food	314	211
restaurant	57	27
private telephone and fax centre	125	127
estate agency (agency with shop window)	37	80
temporary employment agency	16	12
discothèque, dancing	13	14

Others are increasing in the corridors and declining as stand-alone establishments, but present a positive balance in total across the region.

Retail functions	Changes within retail node corridors 1997-2009	Changes outside retail node corridors 1997-2009
decorative furnishings	59	-12
grocers, general food stores	88	-46
beauty care, sauna, tanning centre	54	-28

Finally, others have a positive balance in retail corridors, but have lost ground in stand-alone retail and present a negative balance over the period 1997-2009 in the Brussels region as a whole.

Retail functions	Changes within retail node corridors 1997-2009	Changes outside retail node corridors 1997-2009
dressmaking fabric	10	-10
shoes	9	-19
hairdressers	30	-184
shoe repairs, locksmith, engraver, tailor	10	-22

These developments seem mainly due to technological innovations, segment restructuring, or the growing importance of bioethical values and personal fulfilment and the new behaviours that result. We shall return to this in the following chapter.

2.3.2.2. Functions in decline

The decline of specialist grocers has been evident for some time. In the Retail Observatory devoted to changes in retail, V. Leroux observed that in 2006 only 12% of the butchers' shops which had existed in 1950 remained, and 35% of the bakers. This is also true of other local shops.

These functions are even more likely to disappear outside the retail corridors than within them.

The sales of goods most affected are:

Retail functions	Changes within retail node corridors 1997-2009	Changes outside retail node corridors 1997-2009
newsagents	-91	-208
butcher, charcuterie	-79	-120
florist	-45	-99
cheesemongers, dairy products milk, delicatessen	-65	-72
bakeries, patisserie	-38	-98

Among services, some, like printing centres and photocopying, face competition from the arrival of printers in households and businesses, and leased printers. Video hire clubs are victims of the 'bundles' offered by TV distributors, and bank branches have been hit by the restructuring of the sector.

Cafés, of which there were 6,100 in 1950, have been closing in huge numbers; only a quarter of these remain.

Retail functions	Changes within retail node corridors 1997-2009	Changes outside retail node corridors 1997-2009
laundrette	-32	-51
funeral directors	-11	-31
bank branches	-116	-83
café, bar, drinks outlet	-380	-491
waffles, ice-cream parlour, tea-room, crêperie	-31	-27

Comparison products, or those which are associated with window shopping, have also seen heavy losses, in slightly higher proportions outside retail corridors. These are mainly goods the purchase of which could be deferred if the household budget ran into problems.

Retail functions	Changes within retail node corridors 1997-2009	Changes outside retail node corridors 1997-2009
car/motorbike/bicycle accessories	-24	-95
bed linen, rugs, fitted carpets	-61	-50
pictures, furnishing fabrics, wallpapers	-69	-42
fuel and service stations	-16	-72
clothes, lingerie	-3	-80
jewellery, clock and watch making	-41	-19
leather goods	-35	-10
tiling, sanitary fittings	-11	-23
hardware, plumbing	-17	-12

In total, more than 4700 cells have changed use. More than 56.6% are situated outside retail corridors. Of the functions which are experiencing growth, 81% are located within the corridors. Stand-alone stores continue to spring up, which could pose questions for the sustainable development of the region.

We now turn to how the local retail sector is changing.

2.4. Local retail sector

Local retail meets people's on-going, day-to-day needs.

Local shops contribute to the quality of life in local districts, particularly when they are grouped together into local nodes. They are vital for people with reduced mobility or without cars.

They deserve particular attention in any plan for a sustainable city.

In a previous edition of the Observatory, the author[5] noted that between 1950 and 1997, the local retail sector shrank by 44% of its original size, and to one-third between 1950 and 2006. The 2009 figures show that this decline has now halted to some extent.

Local retail functions	1950	1969	1997	2006	2009
butcher, charcuterie	2155	1407	478	249	279
grocers, general food stores	4626	2794	905	798	947
bakeries, patisserie	1420	1005	686	500	547
hairdressers	2046	2160	1369	874	1162
newsagents	957	1002	719	546	486
pharmacy, herbalist	645	703	671	647	615
convenience store/supermarket		43	160	243	262
Total	11 849	9114	4988	3857	4298
Change index	100	76,9	42,1	32,6	36,3

However, this slight growth is not linear. Still, for the first time in a very long while, the average annual growth of certain functions in now positive.

Local retail functions	1950-1969	1969-1997	2006-2009
butcher, charcuterie	-2,22 %	-3,78 %	3,86 %
grocers, general food stores	-2,62 %	-3,95 %	5,87 %
bakeries, patisserie	-1,80 %	-1,35 %	3,04 %
hairdressers	0,29 %	-1,62 %	9,96 %
newsagents	0,24 %	-1,18 %	-3,81 %
pharmacy, herbalist	0,45 %	-0,17 %	-1,68 %
mini-market/supermarket		4,80 %	2,54 %

5
Igeat (ULB) 2007
Retail Observatory –
Half a century of changes in retail in Brussels

However, these increases take place differently within and outside the PRAS retail corridors.

Convenience stores and supermarkets are the only segment which is growing outside the corridors.
General food stores record positive growth across the whole region.
Increases in local functions are located in the corridors.
This means that the number of local nodes outside the retail corridors is continuing to shrink, and that local functions are less and less local.

Local retail functions	Outside retail node corridors		Within retail node corridors		Total		Average rate of annual growth 1997-2009		
	1997	2009	1997	2009	1997	2009	HLNC	LNC	HLNC+ LNC
butcher, charcuterie	253	133	225	146	478	279	-5,22	-3,54	-4,39
grocers, general food stores	736	690	345	433	1081	1123	-0,53	1,9	0,32
bakeries, patisserie	402	304	284	246	686	547	-2,3	-1,29	-1,87
hairdressers	839	655	530	560	1369	1162	-2,04	-0,37	-1,36
newsagents	527	319	393	302	920	621	-4,1	-2,2	-3,22
pharmacy, herbalist	406	378	265	239	671	615	-0,59	-0,93	-0,72
mini-market/supermarket	139	141	120	139	259	280	0,12	1,23	0,65
Total	3302	2620	2162	2065	5464	4627	1,91	-0,38	-1,38

At the conclusion of the study of the evolution of local shops, the authors[6] propose a policy for supporting local nodes, and suggesting the conditions under which the support could be provided. These nodes are fragile. Since they are composed of few retail cells, it is often enough for one local store to close to weaken the others and to cause them too to abandon the little node, obliging local people to shop at a greater distance.

6
Igeat (ULB) 2007
Retail Observatory –
Half a century of changes in retail in Brussels

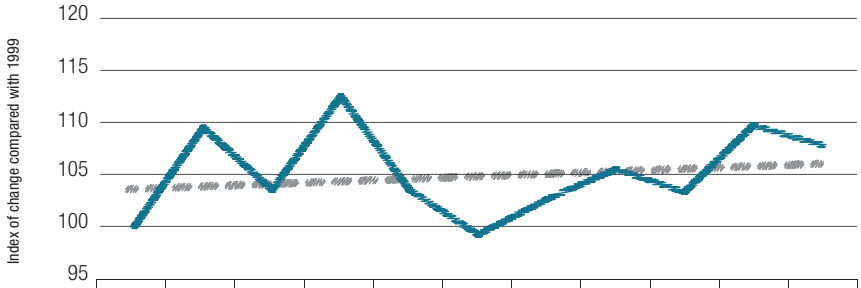
3. Two very contrasting economic periods

3.1. Changes in incomes and household consumption

The annual household budget survey records the expenditure and incomes of Belgian households; it is an important tool in taking stock of public consumer habits.

This survey indicates that average per person incomes rose slightly between 1999 and 2009, though they fell below the 1999 level between 2003 and 2007 before rising again.

Graphic 5
1999-2009
Index of change in disposable income per capita in constant euro in the Brussels region
Index of change as compared to 1999

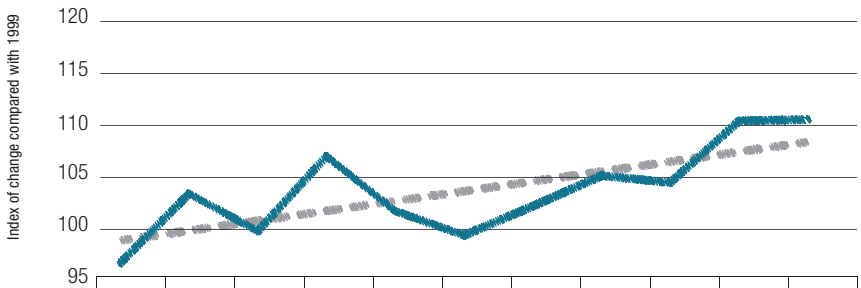


	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Index of change in BCR* per inhabitant	100.0	109.5	103.5	112.5	103.5	99.2	102.6	105.5	103.3	109.7	107.8

Source:
Household budget survey – Retail Observatory calculations (AATL – MRBC)

The downward population trend in the Brussels region reversed from 1998 onwards. Since 2005, the region has once again counted a million inhabitants, a level not seen since the early 1980s. The disposable income of Brussels' residents overall, boosted by population growth, has risen significantly.

Graphic 6
Index of change in the income of the total population in the Brussels region
Index of change as compared to 1999

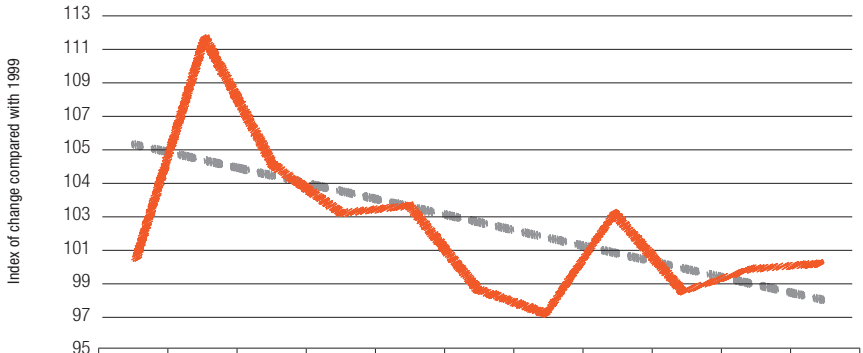


	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
1999-2009: Index of change in total population income in BCR	100.0	110.0	104.6	115.4	107.5	104.0	108.2	112.6	111.6	120.5	120.7

Source:
Household budget survey – Retail Observatory calculations (AATL – MRBC)

* Brussels-Capital region

Between 1999 and 2009 the household budget survey records a rise in the average per capita income in constant euro, while average per capita expenditure registered a decline from 2001.

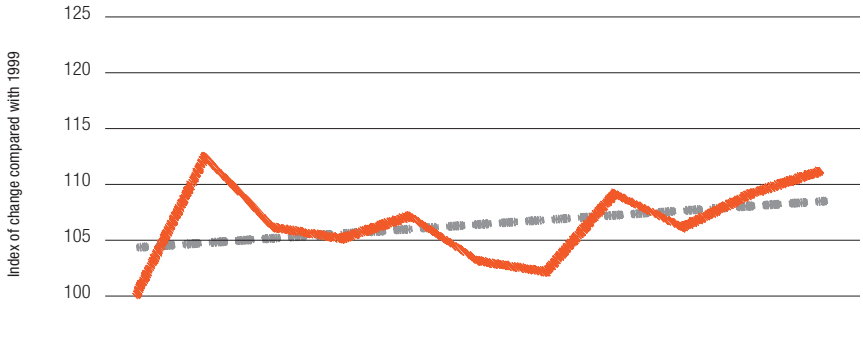


	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
BCR	100.0	111.8	105.0	102.4	102.8	98.3	97.0	102.4	98.2	99.4	99.7

Graphic 7
1999-2009
Index of change expenditure per person in constant euro 2009
Index of change as compared to 1999

Source:
Household budget survey – Retail Observatory calculations (AATL – MRBC)

Total expenditure in the Brussels region is up, boosted by population growth, though it fell between 2001 and 2005.



	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
BCR	100.0	112.4	106.0	105.0	106.8	102.9	102.4	109.3	106.0	109.2	111.6

Graphic 8
1999-2009
Index of change in expenditure of all persons in constant million in the Brussels region
Index of change as compared to 1999

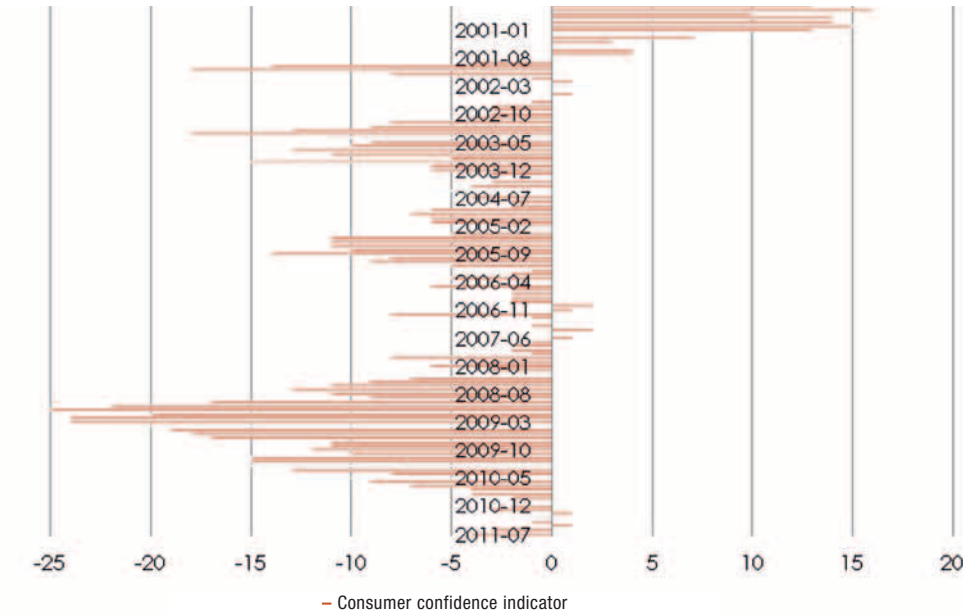
Source:
Household budget survey – Retail Observatory calculations (AATL – MRBC)

A survey of retail businesses in the Brussels region was conducted in 2005. Although it was limited to the retail node corridors identified by the PRAS, it nevertheless covered more than 10,000 retail businesses.

If the fall in per capita consumption has an impact on businesses, there is nevertheless something of a time lag before this impact is felt.

We shall examine two periods, first the period between the 1997 and 2005 surveys, marked by strong growth in the early years, and second the period from 2005 to 2009, disrupted by the impact of the two financial crises which have severely dented consumer confidence.

Graphic 9
2000-2011
Consumer confidence indicator



Source : Belgostat

An analysis of the retail cell survey conducted in 2005 should enable us to identify the functions where spending is more specifically cut back when available resources force households to make trade-offs in their spending. It will also enable us to locate the nodes which have weathered this decline in consumption the best, and to identify the reasons which may explain this resilience.

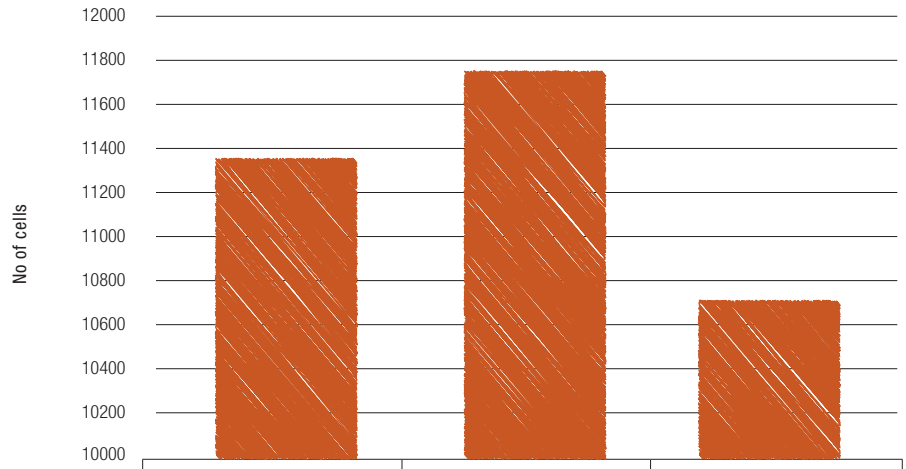
This survey only covers the retail node corridors identified in the land use plan (PRAS). It nevertheless surveys the occupation of 11,741 retail cells, which is more than 50% of the retail businesses in the region.

3.2. Impact on retail

3.2.1. Changes in the number of retail cells in the Brussels region

A comparison of the data, limited to the PRAS retail node corridors, shows that the 2009 survey indicates a loss of almost 600 retail cells, representing more than 5% of the cells present in 1997. This figure is in fact the result of a dual movement. The period from 1997 to 2005 saw an additional 396 stores, representing 3.5% growth over a period of eight years, while between 2005 and 2009 1,041 were lost, a decline of 8.9% in four years.

Graphic 10
Evolution in no of cells in retail corridors



	1997	2005	2009
1997-2005-2009 No of cells in retail corridors	11345	11741	10700

Several factors may explain this movement.

3.2.1.1 Developments in the megastore sector

The general megastore segment continues to extend the range of products carried in its different formats in order to grow its profit margins which are too low in foodstuffs. After the arrival of books, CDs and IT products, it has expanded the space devoted to ready meals and more recently has begun to offer ready-made bouquets of flowers and some services. In so doing, this segment is in competition with the independent specialist retailers in these areas, so their numbers decline.

In parallel, specialist megastores are spreading in several sectors, such as clothing, perfumery, DIY, sports goods, toys, books and newspapers.

Further, in response to the narrow plot sizes, the megastore segment has increased the numbers of small-format stores in the hypercentre, intermediate centres in the inner metropolitan ring and local nodes.

This trend is still on-going: Philippe Moati writes 'The technical expertise which large-scale retail is developing, whether in logistics, knowledge of customer demand, communication or sales staff performance is such that the disadvantage suffered by small shops will only accentuate, and not only in terms of price'[7].

7
Ph. Moati, 2001
L'avenir de la grande distribution, Odile Jacob

3.2.1.2. Franchising

Independent retailers are also facing competition from organised forms of small retail business (franchises, groupings).

These have several advantages:

- the image of the brand or chain among customers and banks
- the know-how and assistance of the franchiser
- all the advantages of the network: reputation, price, synergies, R&D, etc. all while maintaining the status of independent retailer.

Franchising is growing rapidly in both the goods and services sectors. Functions concerned include food and drink, hairdressing, clothing, books, foodstuffs, etc.

The Belgian franchising federation estimates that there are currently:

- number of franchisers: 100
- number of franchises: 3,500
- number of jobs: 30,000
- turnover: 2.4 bn
- 6% of retail trade[8].

3.2.1.3. E-commerce

On-line shops are increasing in numbers, as is the confidence of shoppers in e-commerce. On-line purchases such as books, CDs, travel, hotel and event bookings, airline tickets, clothing and personal hygiene products are more and more common. Shoppers appreciate the opportunity to shop 24/24, the time savings, and the price reductions which are often offered.

3.2.1.4. Competition from medium-sized nearby towns

We should also mention the development of retail in the medium-sized towns in the vicinity of Brussels, such as Leuven, Wavre, or the new retail centre at Louvain-La-Neuve, which attract customers who previous came into Brus-sels to shop and who can now find what they need closer to home.

3.2.1.5. The disappearance of certain functions

Finally, some shops are become scarce or are even disappearing because there is no longer sufficient demand to sustain them, such as hatters, or because increasingly strict regulation limits their customer base, such as gunsmiths, café owners etc.

The restructuring and rationalisation taking place in the Brussels retail sector are not the only explanation of the changing number of retail outlets in the Brussels region, however; no doubt technological innovations and changes in consumer behaviour are other factors which should be taken into account. We shall try to see what impact these factors have on the number of cells occupied by the different retail functions and on the changes at the different levels of the retail node hierarchy.

8
La Libre Belgique
30.03.2011

3.2.2. Changes in the number of cells in different levels of the PRAS retail node corridor hierarchy

As the 2005 survey only counted cells located in the PRAS commercial node corridors, we are limited to these for the analysis of these two periods.

The changes which have occurred have affected the different node levels of PRAS retail corridors differently.

The hierarchy of retail nodes[9] distinguishes four levels of nodes of very different sizes, whose offer of goods and services corresponds to a more or less wide or local market radius, the scarcer goods requiring an extensive market radius, while current needs can be satisfied in a local market radius. It distinguishes:

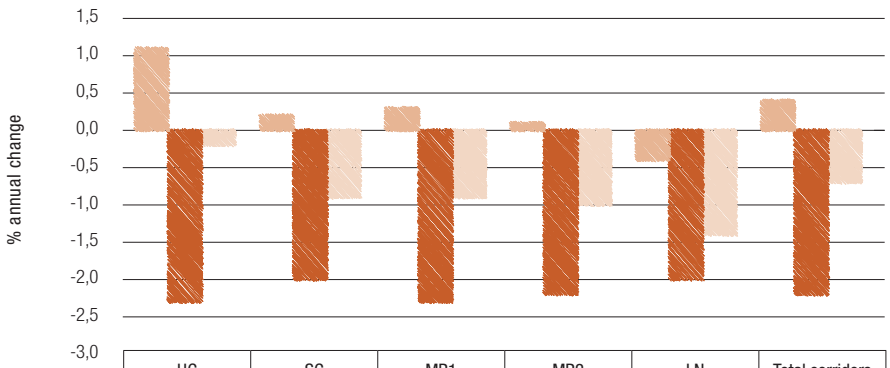
- the hypercentre (HC)
- secondary centres (SC)
- intermediate centres in the inner metropolitan ring (MR1)
- intermediate centres in the outer metropolitan ring (MR2)
- local nodes (LN).

During the period 2005-2009, the number of cells occupied in the retail corridors rose from 11,345 to 11,741.

This fell to 10,700 in 2009.

The two periods are of different lengths: 8 years for the first, 4 years for the second. The annual rate of change clearly shows the shows the extent of the changes in the second period by comparison with the first.

Graphic 11
Rate of annual change in the no of cells in the hierarchy of retail nodes



	HC	SC	MR1	MR2	LN	Total corridors
1997-2005	1.1	0.2	0.3	0.1	-0.4	0.4
2005-2009	-2.3	-2.0	-2.3	-2.2	-2.0	-2.2
1997-2009	-0.2	-0.9	-0.9	-1.0	-1.4	-0.7

During the period 2005-2009, the number of cells occupied falls very sharply at every level of the retail network.

9
Stratec 2005 Retail Observatory– see annex nº 1

3.3. Impact of changing retail functions on the node hierarchy, or how nodes adapt to competition

The analysis of the period 1997-2009 highlights the growth of 37 retail functions[10] and the decline of 61 functions across all outlets in the Brussels region.

An analysis of the years 2005-2009 should enable us to see which functions have suffered most from the fall in consumption and what impacts this fall has had on the different levels of the node hierarchy.

We hope to show, for each hierarchy level, the functions that have suffered most during the period of economic difficulty and those which have instead shown more resilience.

To do so, we have first distinguished two groups:

- functions experiencing growth between 2005 and 2009
- functions in decline between 2005 and 2009

In total 37 functions experienced growth, of which 15 only grew between 2005 and 2009.

The group of goods and services experiencing growth saw a rise by 780 stores, an increase of 6.6 %.

61 functions declined, of which 28 only did so between 2005 and 2009.

1,821 cells offering goods and services in decline between 1997 and 2005 were no longer active in 2009. This represents a loss of retail cells of 15.5 %.

The balance of total active cells between 2005 and 2009 is negative. 1,041 cells are no longer occupied by retail businesses. Taken as a whole, the retail node corridors identified by the PRAS lost 8.9 % of active retail cells during these four years.

The loss of stores selling goods represents 66.2 % of the total losses, or 1,205 cells. In contrast, 312 stores were created. The loss of cells occupied by the sale of goods thus amounts to 890 cells, or 14.1 % of the total existing in 2005.

Services have seen less severe losses: the balance of stores providing services in decline stands at 616, representing 33.8% of the total loss. The group of services experiencing growth saw a rise of 468 stores. In total, the loss of cells occupied by services stands at 148 cells, a fall of 1.4 % in the services present in 2005.

As the patterns for goods and services differ, we have established four groups:

- goods experiencing growth, 23 retail functions
- goods in decline, 45 retail functions
- services experiencing growth, 14 retail functions
- services in decline, 16 retail functions

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See Annex 2 for details

	HC	SC	MR1	MR2	LN	Total retail corridors
Goods experiencing growth	8,2	10,5	11,2	10,2	14,1	10,2
Services experiencing growth	25,2	20,7	28,3	27,5	32,0	25,9
Goods in decline	47,1	49,0	39,0	43,7	30,9	43,7
Services in decline	19,5	19,8	21,5	18,6	23,0	20,2
	100	100	100	100	100	100

2005 | Proportions of goods and surfaces experiencing growth and in decline in the hierarchy of retail nodes

To understand the types of goods and services which shoppers have privileged or renounced, we then classified the goods and services in accordance with the typology proposed by the 2005 Retail Observatory.

The 2005 Retail Observatory put forward a typology based on classification by purchasing behaviour type[11]. This classification distinguishes products according to their frequency of consumption:

Goods are classified as:

- commodity products, including current purchases: food, newspapers
- comparison products: products normally purchased after visiting several shops
- integrated retail, selling a wide range of different products
- selective products, which include rare or innovative products.

Services include:

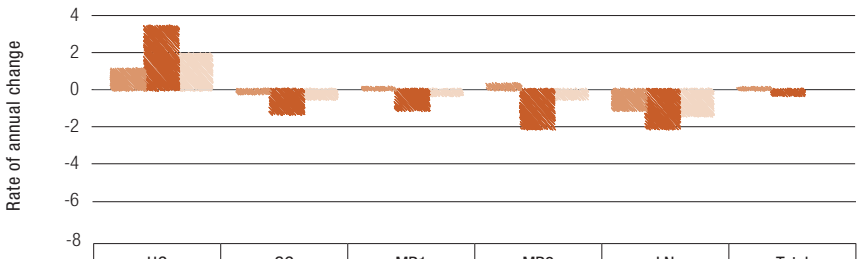
- personal services
- complementary products, mainly catering services
- other services, covering bank branches, employment agencies, tool hire, garment repair etc.

This typology enables us to measure the evolution of these goods and services in the hierarchy of retail nodes. The various classifications in this typology undergo very different evolutions at different levels of the corridor hierarchy.

3.3.1. Evolution of typology classifications in the retail node hierarchy

'Commodity products', functions which were over-represented in the intermediate centres in the outer metropolitan ring and the nodes in 2002, have paradoxically seen growth in the hypercentre. The 'return to the city', that is to say the phenomenon whereby young, well-educated and highly urbanised young people are moving into the city centre, probably explains this growth.

Graphic 12
1997 - 2005
2005 - 2009
1997 - 2009
Rate of annual change in commodity products in the retail node hierarchy



	HC	SC	MR1	MR2	LN	Total
1997-2005	1.1	-0.2	0.1	0.3	-1.1	0.1
2005-2009	3.4	1.3	-1.1	-2.1	-2.1	-0.3
1997-2009	1.9	-0.5	-0.3	-0.5	-1.4	0.0

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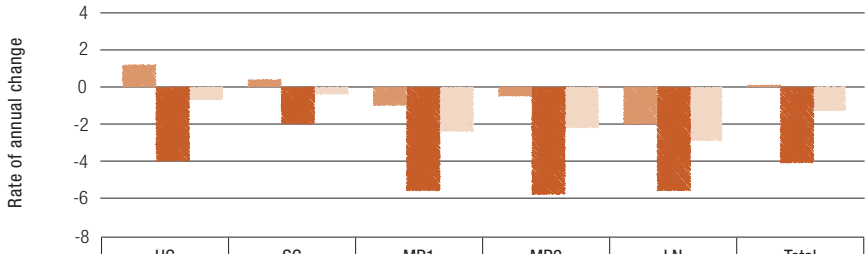
Stratec 2005 *Retail Observatory*– see annex no 3

The 'Comparison products' classification, which in 2002 was typical of secondary centres and very well represented in the hypercentre, presents a negative balance for the two periods taken as a whole at every level of the retail network, after experiencing growth in the hypercentre and secondary centres during the earlier period.

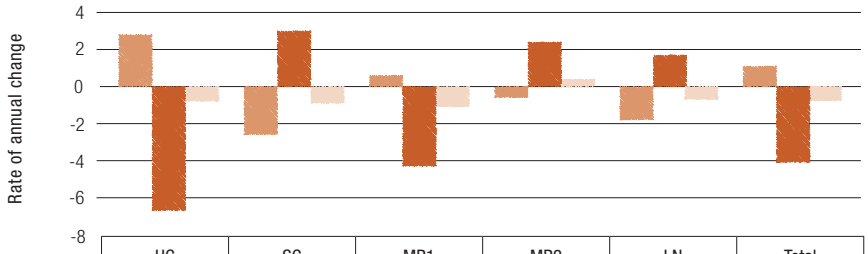
Graphic 13
1997 - 2005
2005 - 2009
1997 - 2009
Rate of annual change in comparison products in the retail node hierarchy



	HC	SC	MR1	MR2	LN	Total
1997-2005	1.2	0.4	-1.0	-0.5	-2.0	0.1
2005-2009	-4.0	-2.0	-5.6	-5.8	-5.6	-4.1
1997-2009	-0.7	-0.4	-2.4	-2.2	-2.9	-1.3

'Selective products', typical of the hypercentre, spread though all levels of the retail corridor hierarchy in both the first and second periods, but by the end of these twelve years there was no growth except in the intermediate centres in the outer metropolitan ring.

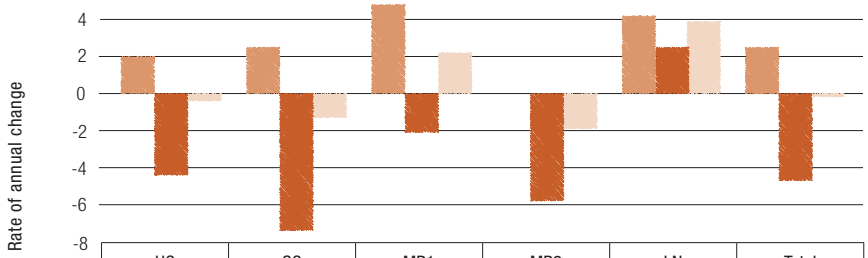
Graphic 14
1997 - 2005
2005 - 2009
1997 - 2009
Rate of annual change in selective products in the retail node hierarchy



	HC	SC	MR1	MR2	LN	Total
1997-2005	2.8	-2.6	0.6	-0.6	-1.8	1.1
2005-2009	-6.7	3.0	-4.3	2.4	1.7	-4.1
1997-2009	-0.8	-0.9	-1.1	0.4	-0.7	-0.8

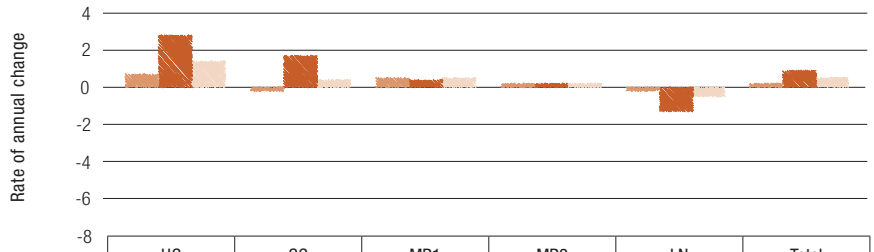
'Integrated retail', mainly located in secondary centres in 2002, grew everywhere in the first period except in the intermediate centres in the outer metropolitan ring, but in 2009 the balance is only positive in the intermediate centres in the inner metropolitan ring and in local nodes.

Graphic 15
1997 - 2005
2005 - 2009
1997 - 2009
Rate of annual change in integrated products in the retail node hierarchy



	HC	SC	MR1	MR2	LN	Total
1997-2005	2.0	2.5	4.8	0.0	4.2	2.5
2005-2009	-4.4	-7.4	-2.1	-5.8	2.5	-4.7
1997-2009	-0.4	-1.3	2.2	-1.9	3.9	-0.2

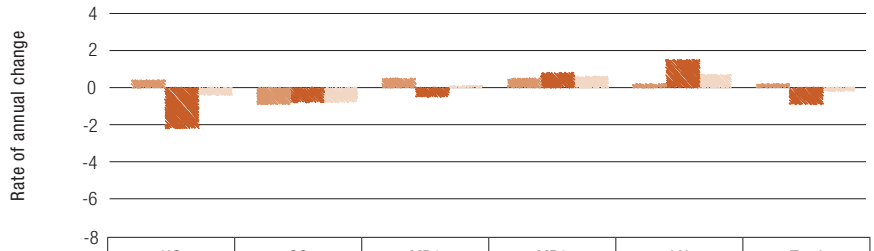
‘Personal services’ are on the increase at every level of the retail network except in local nodes, as are ‘other services’.



	HC	SC	MR1	MR2	LN	Total
1997-2005	0.7	-0.2	0.5	0.2	-0.2	0.2
2005-2009	2.8	1.7	0.4	0.2	-1.3	0.9
1997-2009	1.4	0.4	0.5	0.2	-0.5	0.5

Graphic 16
1997 - 2005
2005 - 2009
1997 - 2009
Rate of annual change in personal services in the retail node hierarchy

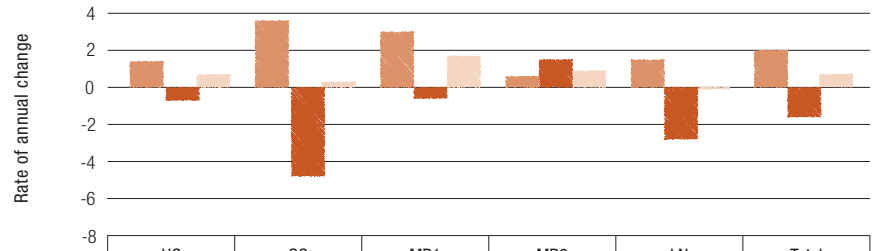
‘Complementary products’ (catering services), mainly present in the hypercentre in 1997, have become more widespread and have now spread to all levels of the retail corridor hierarchy except secondary centres, though they are declining in the hypercentre.



	HC	SC	MR1	MR2	LN	Total
1997-2005	0.4	-0.9	0.5	0.5	0.2	0.2
2005-2009	-2.2	-0.8	-0.5	0.8	1.5	-0.9
1997-2009	-0.4	-0.8	0.1	0.6	0.7	-0.2

Graphic 17
1997 - 2005
2005 - 2009
1997 - 2009
Rate of annual change in complementary products in the retail node hierarchy

‘Other retail services’ present a positive balance at the end of the 12-year period, except in local nodes.



	HC	SC	MR1	MR2	LN	Total
1997-2005	1.4	3.6	3.0	0.6	1.5	2.0
2005-2009	-0.7	-4.8	-0.6	1.5	-2.8	-1.6
1997-2009	0.7	0.3	1.7	0.9	-0.1	0.7

Graphic 18
1997 - 2005
2005 - 2009
1997 - 2009
Rate of annual change in ‘other services’ in the retail node hierarchy

This examination of the major function classes enables us to visualise those in which the different levels of the retail node hierarchy are experiencing the greatest changes.

However, these classifications also contain functions which are evolving in different directions. To understand these movements, it is necessary to consider the impact of the different functions covered by these classes.

3.3.2. Impact of functions in the hierarchy of retail nodes between 2005 and 2009

To describe the impact of these functions on dynamism at different levels of the hierarchy, we have identified, for each level, the functions whose impact has been greatest in the period 2005-2009, whether they are experiencing growth or in decline.

3.3.2.1. Hypercentre

Between 2005 and 2009, the rate of change in all functions in the hypercentre was -9.4 %.
The following functions account for the majority of losses:

Typology classification	Functions	2005	2009
Other types of retail service	private telephone and fax centre	78	52
Comparison products	clothes, lingerie	605	528
Selective products:	antiques, second-hand goods	164	92
Complementary products	café, bar, drinks outlet	408	255

In contrast, the following functions experienced sound growth:

Typology classification	Functions	2005	2009
Complementary products	cafeteria, snacks, fast-food	220	279
Commodity products	decorative furnishings	25	60
Comparison products	beauty care, sauna, tanning centre	34	60
Commodity products	chocolatier and similar	43	72

3.3.2.2. Secondary centres

The rate of change in the secondary centres is -8.8 %.

The following functions are mainly responsible for this decline:

Typology classification	Functions	2005	2009
Integrated retail	general stores	67	38
Commodity products	souvenirs, gifts	36	21
Comparison products	white goods, kitchen equipment	22	4
Comparison products	TV, hi-fi	36	9
Other types of retail service	private telephone and fax centre	107	61
Complementary products	waffles, ice-cream parlour, crêperie	19	4
Other types of retail service	bank branches	66	50

Nevertheless, some functions experienced sound growth:

Typology classification	Functions	2005	2009
Selective products	IT products (retail)	14	34
Complementary products	cafeteria, snacks, fast-food	133	156
Comparison products	crockery and tableware	3	32

3.3.2.3. Intermediate centres in the inner metropolitan ring

In the intermediate centres, the rate of change between 2005 and 2009 is -9.2%.
The functions recording the sharpest losses are:

Typology classification	Functions	2005	2009
Integrated retail	general stores	21	5
Commodity products	photographers	30	16
Comparison products	clothes, lingerie	167	145
Selective products	antiques, second-hand goods	22	7
Commodity products	bakeries, patisserie	69	49
Commodity products	newsagents	64	52
Comparison products	white goods, kitchen equipment	21	2
Comparison products	TV, HI-FI	19	8
Other types of retail service	private telephone and fax centre	71	53
Other types of retail service	bank branches	51	40
Other types of retail service	travel agencies	35	19
Complementary products	café, bar, drinks outlet	171	140

However, other functions saw solid growth:

Typology classification	Functions	2005	2009
Integrated retail	multi-purpose	26	38
Commodity products	grocers, general food stores	79	97
Other types of retail service	other (tool hire, cars, clothes)	1	12
Other types of retail service	estate agency (agency with shop window)	10	21
Complementary products	cafeteria, snacks, fast-food	115	148

3.3.2.4. Intermediate centres in the outer metropolitan ring

In the intermediate centres, the rate of change between 2005 and 2009 is -8.8%.
The main declines are due to the following functions:

Typology classification	Functions	2005	2009
Commodity products	photographers	33	15
Commodity products	bakeries, patisserie	48	39
Comparison products	white goods, kitchen equipment	12	2
Other types of retail service	bank branches	79	67
Complementary products	café, bar, drinks outlet	91	63

But four functions recorded healthy growth:

Typology classification	Functions	2005	2009
Commodity products	mobile telephony	17	26
Other types of retail service	estate agency (agency with shop window)	7	17
Complementary products	cafeteria, snacks, fast-food	54	100
Commodity products	late-opening general stores	11	20

3.3.2.5. Local nodes

Local nodes saw a rate of change of -8%.
Many functions are in decline, especially the following:

Typology classification	Functions	2005	2009
Comparison products	clothes, lingerie	53	45
Selective products:	antiques, second-hand goods	11	3
Commodity products	butcher, charcuterie	40	32
Commodity products	newsagents	54	38
Comparison products	white goods, kitchen equipment	8	0
Comparison products	TV, hi-fi	12	4
Other types of retail service	private telephone and fax centre	34	24
Other types of retail service	bank branches	41	34
Complementary products	café, bar, drinks outlet	106	72
Commodity products	pharmacy, herbalist	52	45
Other types of retail service	video rental, amusement arcade	13	6
Comparison products	beauty care, sauna, tanning centre	28	18

But other functions recorded healthy growth, in particular:

Typology classification	Functions	2005	2009
Integrated retail	multi-purpose	14	21
Complementary products	cafeteria, snacks, fast-food	73	120
Complementary products	restaurant	137	150

3.4. How the overall supply of goods and surfaces has changed in the hierarchy of retail nodes

Between 2005 and 2009, every level of the hierarchy lost retail businesses supplying both goods and services.

The sale of goods continues to be the majority activity in the retail corridors as a whole, but its importance is in decline at every level of the hierarchy. The sale of goods now remains the majority activity only in the hypercentre and secondary centres.

2005 | 2009 Number of retail cells offering goods or services

	2005		2009		2005-2009	
	Goods	Services	Goods	Services	Goods	Services
Hypercentre	2309	1866	2010	1773	-299	-93
Secondary centres	1447	983	1305	926	-142	-57
Intermediate centres, inner metropolitan ring	1084	1076	898	1063	-186	-13
Intermediate centres, outer metropolitan ring	879	752	711	777	-168	25
Local nodes	604	741	506	731	-98	-10
	6323	5418	5430	5270	-893	-148

The proportion of services has therefore grown at every level, but the most striking growth has been at the lowest levels.

2005 | 2009 Proportions of goods and surfaces in the hierarchy of retail nodes

	Goods		Services	
	2005	2009	2005	2009
Hypercentre	55,3	53,1	44,7	46,9
Secondary centres	59,5	58,5	40,5	41,5
Intermediate centres, inner metropolitan ring	50,2	45,8	49,8	54,2
Intermediate centres, outer metropolitan ring	53,9	47,8	46,1	52,2
Local nodes	44,9	40,9	55,1	59,1
	53,9	50,7	46,1	49,3

The rate of change between 2005 and 2009 for goods and services experiencing growth or in decline has evolved as follows:

- the rise in goods experiencing growth is greatest in the hypercentre
- intermediate centres in the outer metropolitan ring and local nodes have seen the largest increase in services experiencing growth.

These two groups represent a minority of retail functions as a whole.

For declining groups, the intermediate centres are seeing a more pronounced decline than other classes in the hierarchy. The hypercentre has recorded the greatest loss of businesses in the 'services in decline' group.

3.5. Possible explanations of these developments

3.5.1. Hypotheses regarding functions in decline

Functions in decline as a whole over these two periods accounted in 1997 for 66.3 % of the cells occupied in retail corridors in the Brussels region, falling to 64.6 % in 2005. By the time of the 2009 survey, these functions only accounted for 53.1 %.

Many of these functions were already losing ground between 1997 and 2005. However, during the period 2005-2009 they lost an even larger number of cells, despite the fact that the previous period had lasted eight years.

Several mechanisms are at work in the loss of retail cells. The aspects addressed below represent an attempt to describe some of the factors which may explain the disappearance of a large number of retail businesses during the years 2005-2009, when the changes were the most abrupt.

3.5.1.1. Sectoral restructuring

The growth of the megastore sector has weakened a number of commodity sales outlets such as specialist food shops: butchers (-12%) [12], cheesemongers (-32.7 %) or poulterers (-21.1 %) have been losing ground for a long time. But florists (-12.5%) and newsagents and booksellers (-17.7%) are also now in decline, megastores having recently incorporated these functions.

Some 'retail services', including bank branches (- 31.7 % since 1997), are suffering from the effects of restructuring in their sector. The banking sector has seen a number of mergers following which the branch network has been rationalised, and these developments have been further exacerbated by the growing availability of 'home banking' services.

3.5.1.2. New technologies

The advance of new technologies and their spread, thanks to the falling costs of IT equipment, has had an adverse impact on retail services such as copy shops or video rental. The arrival of IT equipment in the home reduces the need for copying (-12.1 %) and the multiplication of 'bundles' offered by television distributors provides stiff competition to the video rental market (-29.2 %). Travel agencies have been hit by competition from Internet hotel and travel booking services.

3.5.1.3. Deferred purchases

Changes in consumer budgets recorded in the household budget survey show a decline in the average Brussels household budget from 2002.

A 2011 study from the CRIOC[13] shows that almost a third of consumers (32%) are experiencing substantial material privation. The worst affected are in Brussels. 12% of respondents said that they could not buy a washing machines, and 10% that they could not afford a television.

12 The percentages quoted are for the period 2005-2009 unless otherwise indicated.

13 CRIOC July 2011 *Attentes de consommation.*

In the second period, the purchase of some non-urgent goods was postponed as households made trade-offs in falling budgets. Unsurprisingly, this mainly affects relatively high-ticket 'comparison products' and 'selective products' such as furniture (-18.2%), antiques (-50%), hi-fi equipment (-63.9%) and white goods (-86.3%), but clothing (-1%) and jewellery (-10.1%) have also been hit.

3.5.1.4. New regulations

Private fax and telephone centres saw rapid growth in the first period, mainly in retail nodes in the north and west of the region, in districts with a large immigrant population hoping to stay in contact with their families in their home countries. Operations to ensure that these businesses were legal led to the closure of some.

Late-opening general stores also spread in this period, sometimes causing a degree of discontent.

The introduction of legislation requiring a permit to open these shops halted new openings in the second period.

Furthermore the spread of software like Skype now provides competition with private fax and telephone centres.

These two activities account for a loss of retail cells of 34.1% (phone shops) and 11.4% (late-opening general stores) respectively.

'Complementary products' - cafés, bars and drinks outlets - continue to decline, now at a more rapid rate than in the previous period. Between 1969 and 1997, the annual rate of loss was 3.5% compared with 4.4% between 1997 and 2009 and 27% between 2005 and 2009. Formerly a local meeting place, the café, as the heart of neighbourhood life, has fallen victim to social changes over several decades. Television and leisure developments have overtaken the desire to spend time in the corner café. Other explanations include megastores, which encourage the consumption of alcohol at lower cost; and the prevention of alcoholism and road traffic accidents with the introduction of the breathalyser. Anti-tobacco regulations have done the rest.

Tea-rooms, waffles and dairies have declined particularly sharply in the second period (-61.7%). However, they have been disappearing for a long time, having gradually lost their main customers with the increasing female employment rate.

3.5.2. Hypotheses regarding functions experiencing growth

Functions experiencing growth as a whole over these two periods accounted in 1997, 2005 and 2009 respectively, for 33.7%, 35.4% and 46.9% of cells occupied in all retail node corridors.

Several factors contributed to the growth of these functions in the period 2005 - 2009.

3.5.2.1. New technologies

Though the new technologies damaged certain kinds of business, the period 1997-2009 has seen the explosion of the web, numerous innovations in IT and the arrival of the cell phone.

IT innovations boosted the number of specialist sales outlets [+43%]. These 'selective products' have become commonplace, with growth mainly concentrated in the secondary centres and intermediate centres in the outer metropolitan ring.

Similarly, the sales of cell phones - very limited in 1997 - rose by over 786% between 1997 and 2005 and by a further 31.4% between 2005 and 2009.

3.5.2.2. New consumer behaviours

Changes to the environment have brought about new consumer behaviours.
In a 2008 study, the IPSOS noted that after the fears which over-valued privacy and personal development, 2007 saw the beginning of new concerns about the future of the planet. The two paradigms co-exist.

3.5.2.2.1. Bioethics

The rise in ethical, social and environmental concerns is undoubtedly one of the key consumer trends of the last decade. The success of organic farming or fair trade provides concrete proof that today's consumers are increasingly attentive to the conduct of businesses and to the way in which the products they buy are produced.

But what is the actual extent of this phenomenon? How has it evolved in recent years?
A recent CRIOC survey[14] on the choice of a food shop shows that concern about ethical conditions of production correlates with social class. Consumers belonging to an average social class are less interested in consumer ethics. At times of crisis, the higher social classes are the most alive to these criteria.

In the long-term, however, it seems that social class will no longer be a determining factor in the appeal of ethical products. The entire population is becoming more and more concerned. Fair trade products made their appearance in megastores some time ago. And the space on the shelves for organic products is growing.

Between 2005 and 2009, specialist health foods outlets increased by [+58 %].

Last but not least, the trend towards 'soft mobility' is benefiting cycle and motorbike shops, which are increasing in numbers in intermediate centres and local nodes [+ 62 %].

3.5.2.2.2. The private sphere

Personal services are growing overall. Hairdressers are experiencing growth in the hypercentre; Matongé alone accounts for 25 new salons.

Beauty care [+ 11 % between 2005 and 2009] is on the rise everywhere except in local nodes.

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CRIOC January 2011
Enseignes, magasins et consommateurs.

Though people are not spending much on household goods during this period, there is nevertheless a trend towards the purchase of goods which improve daily life, small items of furnishings [48 %] or crockery and tableware [343 %]. Grants for the installation of insulation are also undoubtedly benefiting builders' merchants which sell double glazed windows and doors [52.6%].

3.5.2.2.3. Self-fulfilment

Self-fulfilment goes hand in hand with the increasing interest in making things at home: the desire to make things for themselves reassures consumers of the quality of the products used enables them to control the risks. DIY/handiwork activities [+ 47.1% between 2005 and 2009], and artists' equipment [+40%] both reflect this trend, as does the fashion for every aspect of cooking, reflected in the vogue for crockery and tableware shops which includes ordinary household articles and more specialist items [+ 343% between 2005 and 2009].

3.5.2.2.4. Time and place

Whether it is a matter of the time it takes to reach a shop, the time spent in the aisles or the time lost or saved at the check-outs and counters... shoppers are increasingly conscious of time-saving when choosing the location or the times at which they shop.

Another CRIOC survey[15] on choosing food stores shows that 39% of consumers spontaneously mention the location of a sales point [close to home or the workplace] as a criterion for their choice, and 89% put this criterion among the three most important. Since 2005 this criterion has been the first cited in the CRIOC's food surveys.

It was not even in the top three in 2004.

Grocers, which have been declining for a long time, are now stable or even on the increase [8.3%]. Their numbers are rising in the hypercentre [+37%], in secondary centres [+33%] and in intermediate centres in the inner [+39%] and outer [+15%] metropolitan rings, but are declining in local nodes.

Further, since 1999 studies of consumer behaviour and expectations point to the fact that consumers experience shopping in large stores as a chore, and accord much importance to the time they save in small shops.

Chains are clearly making time, everyday life, proximity and practicalities the key words to bring their formats up to date or to create new ones. Convenience stores [+11%] are setting up in local nodes for preference.

Incessant time-chasing, and ever-shorter lunch breaks, encourage people to take meals on the run. Snack bars, fast food outlets and canteens are present throughout the region both within retail corridors (+ 35% between 2005 and 2009) and outside them. 211 have been set up in stand-alone store areas and 314 have been opened right across the corridor hierarchy.

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CRIOC January 2011
Attentes de consommation.

3.6. What has happened between 2005 and 2009 in the different nodes of the hierarchy?

All retail nodes have experienced a very significant loss of retail cells. 1821 cells have shut up shop, representing 15.5% of the retail businesses existing in 2005.

In the same period, 780 new shops offering goods and services have opened their doors.

The balance for the period is thus a loss of 1041 retail cells, or an 8.9% reduction in the number of retail establishments active in 2005.

We have witnessed a significant turn-over in functions, particularly in the sale of goods. 1205 cells ceased their activities and 312 have been created.

Nodes at different levels of the hierarchy have been affected in different ways by these movements.

3.6.1. Hypercentre

In the hypercentre, six of the 19 nodes saw a rise in the number of retail cells between 2005 and 2009.

These are mainly small 'specialist' nodes, including those situated close to a railway station.

- Luxembourg
- Midi
- Ravenstein
- Progrès
- Dansaert

Only one node on the Nord-Midi axis saw a rise in the number of retail cells:

- Stalingrad

But on average this axis has lost fewer shops than the hypercentre as a whole: -8.4 % against -9.4 %.

The upper town, inter alia due to significant losses at Toison d'Or, has lost 10.4 % of its retail outlets, and the Marolles district, in particular the rue Haute-rue Blaes area, has seen the closure of a very large number of antique and second-hand shops, and has lost 19.6 % of the retail cells occupied in 2005.

In total, the hypercentre has lost 9.4 % of cells in activity in 2005, representing an average loss which is higher than the rate for all nodes taken together (- 8.9%).

3.6.2. Secondary centres

No secondary centre has witnessed a rise in the number of retail businesses.

Nodes such as Bailli-Vleurgat, Uccle centre and Helmet have lost more than 10 % of their shops, but the secondary centres overall have lost -8.2 % of their cells, less than the average for all retail corridors taken together.

3.6.3. Intermediate centres in the inner metropolitan ring

Of the 29 intermediate centres in the inner metropolitan ring, only three have grown in size during this period:

- Chaussée de Mons
- Chaussée de Ninove
- Rue de la Prairie

Charles Quint and Louise-Lesbroussart have each loss more than 20 % of active cells.
Seven nodes have lost more than 10%:

- La Bascule (-19.6)
- Rue des Tongres (-16.7)
- Place Jourdan (-12.2)
- Janson (-12.9)
- Rue Vanderkindere (-11.4)
- Chaussée de Waterloo (-10.3)
- Dailly-Chazal (-10.1)

In total, intermediate centres in the inner metropolitan ring have seen an average decline of -9.2%.

3.6.4. Intermediate centres in the outer metropolitan ring

Of the 16 intermediate centres in the outer metropolitan ring, only two witnessed a rise in the number of retail outlets between 2005 and 2009:

- Cimetière d'Ixelles (+0.9%)
- Wavre Souverain (+21.1%)

7 nodes saw significant losses:

- Place Keym (-34.5%)
- Vivier d'Oie (-20.5%)
- Vekemans (-16.7%)
- Georges Henri (-14%)
- Étoile Coghen (-13.6%)
- Place Wiener (-12.5%)
- Docteur Schweitzer (-10.3%)

The other centres have only seen small changes in numbers during the period 2005-2009.

The average loss at this level of the hierarchy is slightly higher than for all retail corridors together, at -8.8%.

3.6.5. Local nodes

In the local nodes, there are some very contrasting situations.

In 16 of 40 local nodes, newly opened retail businesses outnumbered closures between 2005 and 2009:

This rise is significant in:

- Duchesse de Brabant (+11.8%)
- Escadron (+20%)
- Place des Maïeurs (+24%)
- Ropsy Chaudron (+17.8%)

It is less than 10% in:

- Van Artevelde
- Vert Chasseur
- Avenue Henri Conscience
- Brugmann
- Cage aux Ours
- Germoir
- Louvain Meiser
- Ninove Mettewie
- Pervyse
- Pinoy

- Place St Job
- Place de la Paix

Six nodes have experienced a loss of more than 20% of their retail establishments:
- Dixmude-Ypres (-38.8%)
- Bethléem (-28.2%)
- Rue Gilbert (-28.2%)
- Rue Tomberg (-25%)
- Place St Lambert (-24.2%)
- Langeveld (-20%)

Nine others have lost more than 10% of their retail establishments:
- Petite Suisse (-19.6%)
- Keyen-Stauwen (-17.6%)
- Léon Théodore (-16.2%)
- Louvain-Paduwa (-16%)
- Sainte Gertrude (-16%)
- Josaphat (-14.7 %)
- Buyl (-14.7%)
- Rue au bois (-14.6%)
- Altitude cent (-14.3%)

The other local nodes are either stable or in very slight decline, losing between one and three cells during the period 2005-2009.

Local nodes record an overall loss which is lower than in other levels of the hierarchy, at - 8%.

In total, 27 of the 104 retail corridors defined by the land use plan (PRAS), representing only a quarter, have lost no retail cells overall during the period 2005-2009.

3.6.6. Do these changes have an impact on the roles of the different levels of the retail node hierarchy?

During the period 2005-2009, the various levels of the hierarchy all saw significant losses.

2005 | 2009
Rate of change in no of retail establishments

	2005	2009	2005-2009
Hypercentre	4175	3783	-9,4
Secondary centres	2430	2231	-8,2
Intermediate, inner metropolitan ring	2160	1961	-9,2
Intermediate, outer metropolitan ring	1631	1488	-8,8
Local nodes	1345	1237	-8,0
Total nodes	11 741	10 700	-8,9

Between 1997 and 2005, every level of the hierarchy saw a rise in the number of retail cells, with the exception of local nodes. The increase in the number of active cells in the hypercentre was very significant during this period. This level of the hierarchy responds rapidly to circumstances and took full advantage of the economic boom.

1997 - 2005 Rate of change in no of retail establishments

	1997	2005	1997-2005
Hypercentre	3835	4175	8,9
Secondary centres	2395	2430	1,5
Intermediate, inner metropolitan ring	2109	2160	2,4
Intermediate, outer metropolitan ring	1612	1631	1,2
Local nodes	1394	1345	-3,5
Total nodes	11 345	11 741	3,5

The index of change in the number of cells recorded in the three surveys shows that the larger hierarchical levels were the most resilient. The smaller the nodes, the more significant the losses.

1997 - 2005 - 2009 Index of change in cell numbers in the retail node hierarchy

	1997	2005	2009
Hypercentre	100	108,9	98,6
Secondary centres	100	101,5	93,2
Intermediate, inner metropolitan ring	100	102,4	93,0
Intermediate, outer metropolitan ring	100	101,2	92,3
Local nodes	100	96,5	88,7
Total nodes	100	103,5	94,3

What is the impact of the evolution of these functions on the different hierarchical levels? This impact broadly depends on the particularities of each of these levels.

3.6.6.1. Hypercentre

In the hypercentre, comparison products underwent a significant decline, attributable inter alia to the closures in clothing, shoe shops and home improvement goods.

Likewise, selective products, such as those sold by antique and second-hand dealers, were also hit hard. However, IT products also declined as they became commonplace and moved to other levels of the hierarchy.

Furthermore, the hypercentre has seen a significant loss in complementary products. The opening of many snack bars, canteens and restaurants does not compensate for the loss of 153 café/bars.

However, the sale of commodity goods increased in the hypercentre. These included grocery stores to serve the needs of new inhabitants, chocolatiers attracted by the tourist market and cell phone outlets, a novelty which initially appeared in the centre but which has become commonplace and spread to every level.

In total, the hypercentre lost 392 cells, representing 9.4 % of the cells existing in 2005.

3.6.6.2. Secondary centres

In the secondary centres, selective products present a positive balance, mainly due to the growth in the sale of IT products.

Comparison products show a negative balance, as at other levels of the hierarchy. Shops selling various high-ticket household items have also declined. However, unlike other levels of the hierarchy, clothes and shoe shops are increasing in numbers in these centres, no doubt because of the rising population in most of these districts, and the matching of supply to local demand.

In total, the secondary centres lost 199 cells, representing 8.2 % of the cells existing in 2005.

3.6.6.3. Intermediate centres in the inner metropolitan ring

Intermediate centres in the inner metropolitan ring lost retail cells in every purchasing behaviour class, except in personal services.

Integrated products present a negative balance, with the arrival of 12 multi-purpose stores and the loss of 16 bazaars.

33 snack bars opened, but this was outstripped by the closure of 31 cafés and 8 waffle-sellers. The balance for complementary products is thus also negative.

The same applies to commodity products: 18 grocers opened, but 20 bakers, 10 florists and 10 cheesemongers/delicatessens closed.

Between 2005 and 2009, intermediate centres in the inner metropolitan ring lost 199 retail cells, representing 9.2 % of the businesses present in 2005.

3.6.6.4. Intermediate centres in the outer metropolitan ring

Intermediate centres in the outer metropolitan ring saw a positive balance in selective products, not least due to the opening of IT stores.

Complementary products also rose, with the opening of 46 snack bars which compensates for the loss of 33 cafés.

In the 'other retail services' class, the opening of 10 estate agencies and 18 financial intermediaries offset the closures of travel agencies and private fax and telephone centres.

Commodity products, however, loss 10% of their numbers. This is mainly due to the disappearances of 18 photographers and 18 cheesemonger/delicatessens, representing half of those present in 2005, and to the loss of 10 newsagents/bookshops.

In total, intermediate centres in the outer metropolitan ring lost 143 retail cells, representing 8.8% of the businesses present in 2005.

3.6.6.5. Local nodes

Local nodes saw a significant reduction in commodity products, but many welcomed new multi-purpose stores. They lost 14 grocers, but all have some form of food stores except Archimède, Louvain Meiser and Brugmann. Furthermore, 8 butchers, 7 pharmacies, 5 cheesemongers/delicatessens and 16 newsagents closed their doors.

34 cafés disappeared, but 47 snack bars and 13 restaurants opened. Only Pinoy, Van Artevelde and the Cage aux Ours have none.

In comparison products, the same functions disappeared as in other nodes: clothing, TV/hi-fi, white goods.

In total, they lost 108 cells, representing 8% of the businesses existing in 2005.

Have these developments led to changes in the roles played by the various levels of the hierarchy?

Each hierarchical level has particularities expressed by the location coefficient.[16]
In the hypercentre, the presence of commodity products is increasing, as is that of comparison products; since the 2005 survey, the latter have been a specific function of the hypercentre.

Selective products remain a hypercentre speciality. Their importance has shrunk due to the fact that IT products are now commonplace and have spread to other hierarchical levels, and to the disappearance of large numbers of antique and second-hand dealers. Nevertheless, the hypercentre remains the place where the most businesses selling rare or luxury products are located. It is also the place where innovative retail businesses are most likely to open, included on arrival in the 'undefined retail' category.

Complementary products retain particular importance despite the spread of snack bars in the intermediate centres and local nodes and the disappearance of very many cafés.

The increasing role of comparison products in the hypercentre's range undoubtedly overshadows the secondary centres the more that range is diversified.

The fall in the location coefficient for complementary products has two causes: Firstly, 37.5 % of cafés in the hypercentre closed their doors during the period 2005-2009; and secondly, the fast food industry has spread in intermediate centres and local nodes, as well as in stand-alone areas, since consumption takes place close to the workplace. Nevertheless, the hypercentre remains the place where the most restaurants open.

Secondary centres have strengthened their particularities in terms of both comparison products and integrated retail, although they seem to have lost a little ground in integrated retail due to the closure of numerous bazaars, perhaps to the benefit of intermediate centres in the inner metropolitan ring which are also losing bazaars but where 12 multi-purpose stores have opened.

The 'other services' classification has lost some of its importance in secondary centres, and had in fact previously been inflated by the presence of private fax and telephone centres, which are in decline.

Intermediate centres in the inner and outer metropolitan ring have lost ground in comparison products, but the first are stronger in commodity products and the second in integrated retail, as they seem to be evolving into super local nodes.

Local nodes have lost a large number of specialist food stores and other local shops. However, almost all still have a general food store and thus retain their special characteristic as places for frequent purchases. Increasingly, services are replacing the sale of goods.

Commodity products are becoming one of their specialities: they have almost as many snack bars and restaurants as the hypercentre.

16
Location coefficient: ratio between the percentage obtained by a retail function type in a typological class and the percentage that this classification occupies in the totality of retail functions. If above 1, this coefficient indicates that the retail function is over-represented in the typological class; this retail function can be described as typical when the coefficient reaches or exceeds 1.1.

Graphic 19
1997 - 2005 - 2009
Location coefficients of classifications by purchasing behaviour in the hierarchy of retail nodes

	1997												2005												2009											
	Commodity products	Comparison products	Selective products	Integrated retail	Complementary products	Personal services	Other services	Undefined retail	Grand Total	Commodity products	Comparison products	Selective products	Integrated retail	Complementary products	Personal services	Other services	Undefined retail	Grand Total	Commodity products	Comparison products	Selective products	Integrated retail	Complementary products	Personal services	Other services	Undefined retail	Grand Total
HC	0,73	1,08	1,56	0,65	1,27	0,66	0,88	1,12	1,00	0,75	1,11	1,68	0,60	1,23	0,65	0,80	1,23	1,00	0,86	1,12	1,48	0,61	1,17	0,70	0,84	1,19	1,00
PS	1,05	1,19	0,57	1,81	0,80	0,92	0,98	1,01	1,00	1,05	1,24	0,43	1,84	0,75	0,91	1,10	0,78	1,00	1,00	1,35	0,57	1,58	0,75	0,93	0,94	0,96	1,00
PR1	1,06	0,92	0,93	0,92	0,94	1,23	1,02	0,97	1,00	1,08	0,84	0,90	1,07	0,97	1,28	1,10	0,84	1,00	1,04	0,78	0,90	1,21	0,99	1,26	1,14	0,61	1,00
PR2	1,13	1,02	0,58	1,06	0,74	1,35	1,14	0,73	1,00	1,17	0,99	0,52	0,90	0,78	1,38	1,05	0,87	1,00	1,08	0,91	0,69	0,85	0,83	1,34	1,19	1,12	1,00
NL	1,41	0,56	0,78	0,61	0,98	1,31	1,18	0,99	1,00	1,37	0,50	0,66	0,73	1,05	1,36	1,22	1,09	1,00	1,26	0,46	0,84	0,98	1,15	1,24	1,15	0,96	1,00
	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00

3.7. Conclusion

3.7.1. The period 2005-2009

The period 2005-2009 saw an annual loss of 2.3% of businesses in retail node corridors.

These losses have taken place in businesses offering goods and services.

Some functions, however, are experiencing growth in both of these two groups: commodity products for current consumption, or technological innovations on the one hand, and on the other small luxuries such as beauty treatments or light meals.

The balance of goods experiencing growth in this period stands at 312 units, and 468 units for services.

The much more numerous category of goods in decline includes functions such as specialist food shops, record shops and bookshops and newsagents, functions which were already in decline well before this period.

Between 2005 and 2009, purchases representing a relatively large investment, often home improvement goods, suffered the most. Functions offering less high-ticket goods, the purchase of which can nevertheless be temporary delayed, such as clothes, also saw a number of closures.

Pride of place among services in decline goes to private fax and telephone centres and cafés/bars which represent 58.2% of the total losses in this category.

The balance for goods in decline stands at 1205 retail units, and for services in decline 616 units.

Overall, goods for sale have suffered more than services.

In terms of the purchasing behaviour classification, it was thus mainly comparison and complementary products which declined between 2005 and 2009. In total only personal services present a positive balance, and they do so at every level of the retail node hierarchy except in local nodes.

2005 - 2009
Balance of the number of cells in behaviour typology classifications

Commodity products	-113
Comparison products	-483
Selective products:	-93
Integrated retail	-45
Complementary products	-94
Other types of retail service	-74
Personal services	28
Undefined retail [17]	-167

3.7.2. Overview 1997-2009

During the period 2005-2009 the hypercentre lost a larger number of cells than other levels of the hierarchy. But this level of the hierarchy, more responsive than others, had experienced significant growth in the period 1997-2005.

This dynamism has enabled important nodes to present a positive final balance in terms of the number of occupied cells. These nodes include:

- Boulevard de Waterloo
- Centre-ville
- Dansaert
- St Géry
- Grand Place
- Louise District
- Sablon

In the secondary centres, this only applies to Molenbeek Centre.

In intermediate centres in the inner metropolitan ring, it only applies to Karreveld.

Three intermediate centres in the outer metropolitan ring ended the period 1997-2009 with an increased number of occupied cells:

- De Wand
- Fort Jaco
- Place Dumon

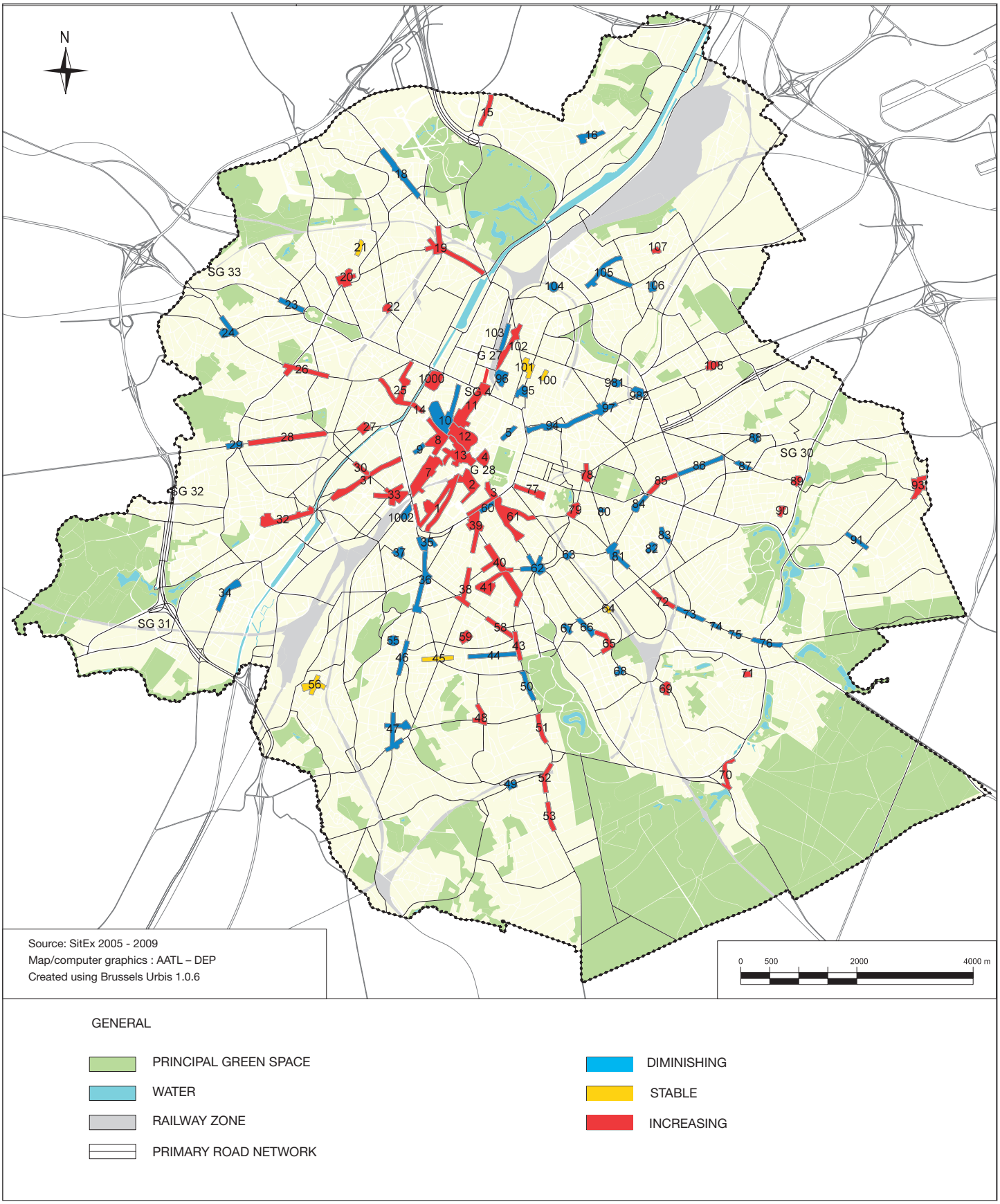
This is only true of four local nodes:

- Archimède
- Chaussée de Wavre
- De Fré
- Werrie Belgica

17
Undefined retail mainly consists of goods, there being only 8 cells offering services in this category.

Changes in the number of cells occupied by shops and services between 1997 and 2005

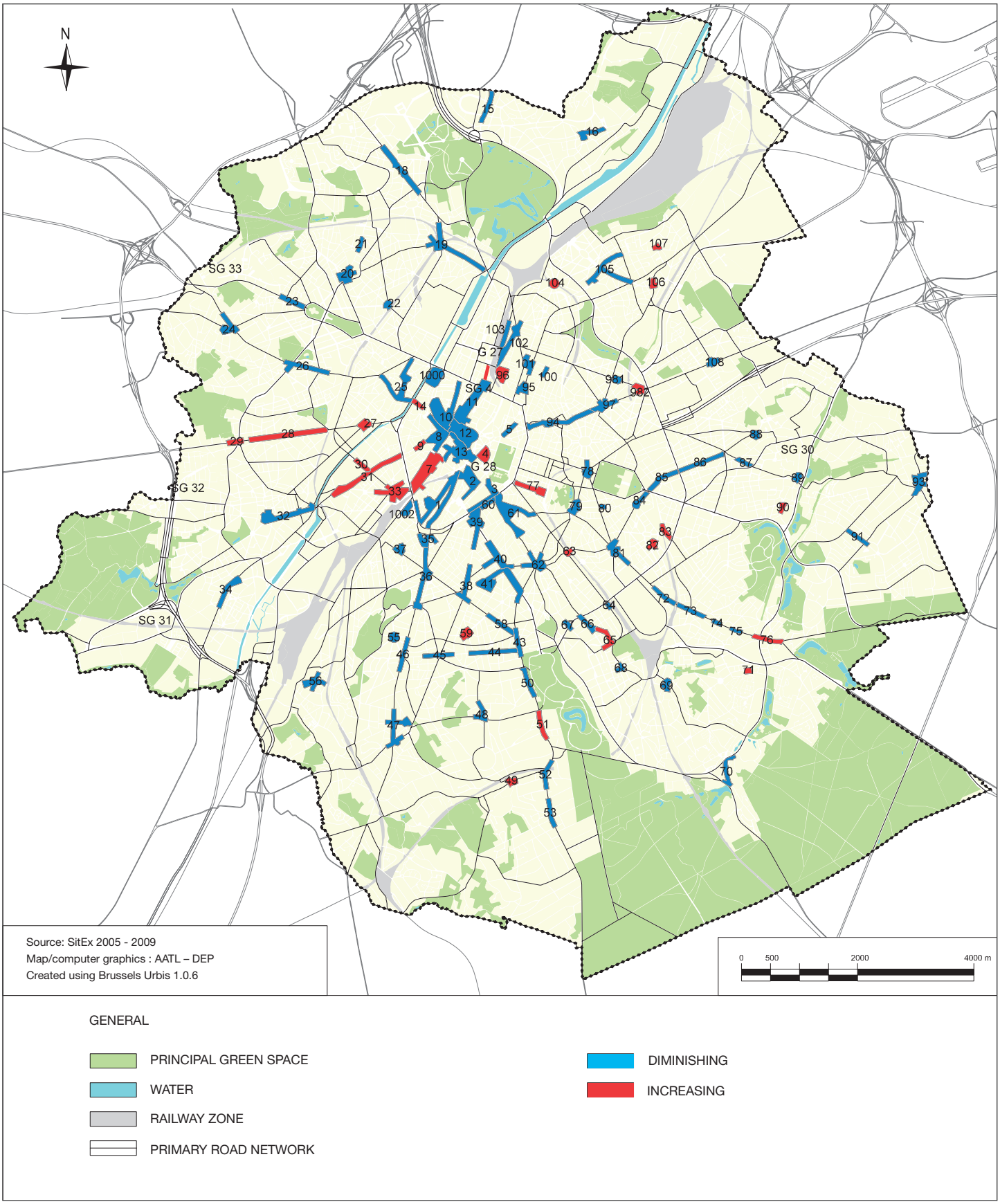
Brussels-Capital Region



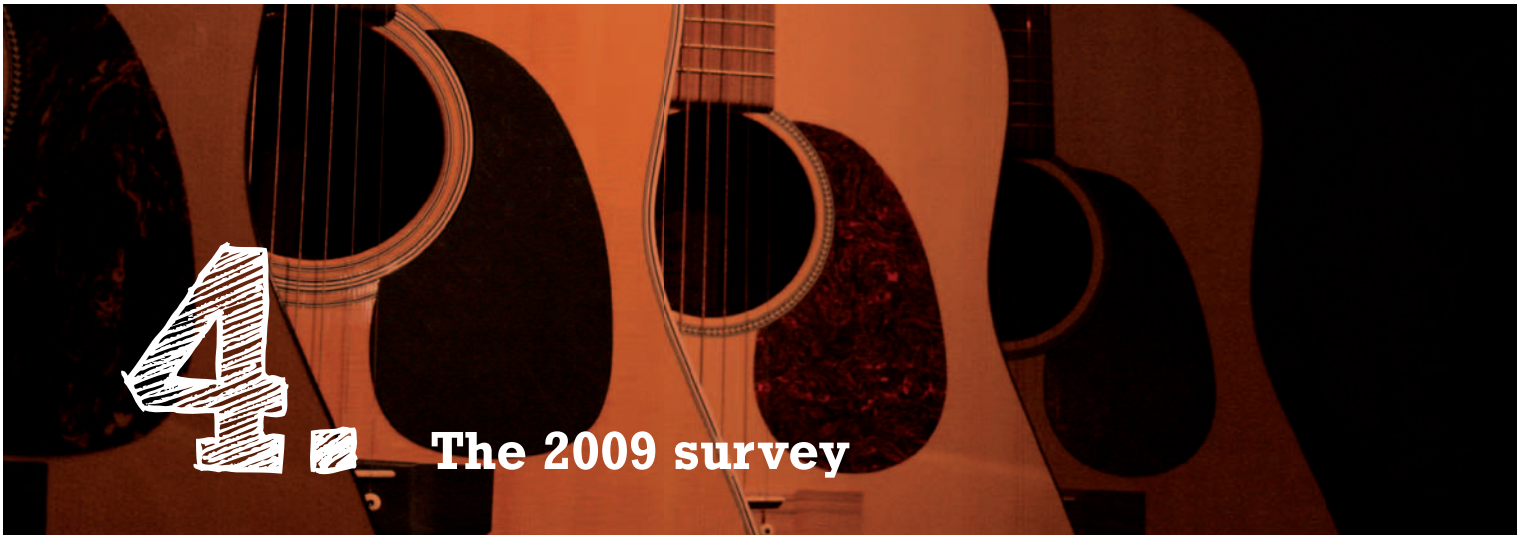
List of PRAS-defined retail corridors, see annex 1

Changes in the number of cells occupied by shops and services between 2005 and 2009

Brussels-Capital Region



List of PRAS-defined retail corridors, see annex 1



4 The 2009 survey

The 2009 survey develops two new aspects of knowledge of retail in Brussels:

- an assessment of the requirements of shops for retail space, this analysis being limited to space used for the sale of goods only
- an assessment of the importance of a new way of organising retail activity, in the form of franchises and branches (or chains) which is more efficient than the traditional independent retailer status.

4.1. Shop requirements for surface area

4.1.1. The average surface area[18] required for the sale of different goods

The 2009 data base contains the surface areas of cells occupied by the sale of goods. There is too little data to enable such an analysis for services, fuel and transport and transport equipment.

2009 | Average surface areas required for the sale of different goods

Sale of goods	No of cells occupied by the sale of goods	Total surface area	Average surface area
Integrated retail	2.621	102.495	39
Intermediate household goods	1.316	111.296	85
Household goods	731	344.132	471
Personal goods	352	318.585	905
Leisure goods	2.463	262.282	106
Foodstuffs	1.554	239.566	154
TOTAL	9.037	1.378.356	153

The average surface areas occupied by the different functions vary in the proportion of 1 to 23. The requirement for space varies greatly, depending on the type of goods sold:

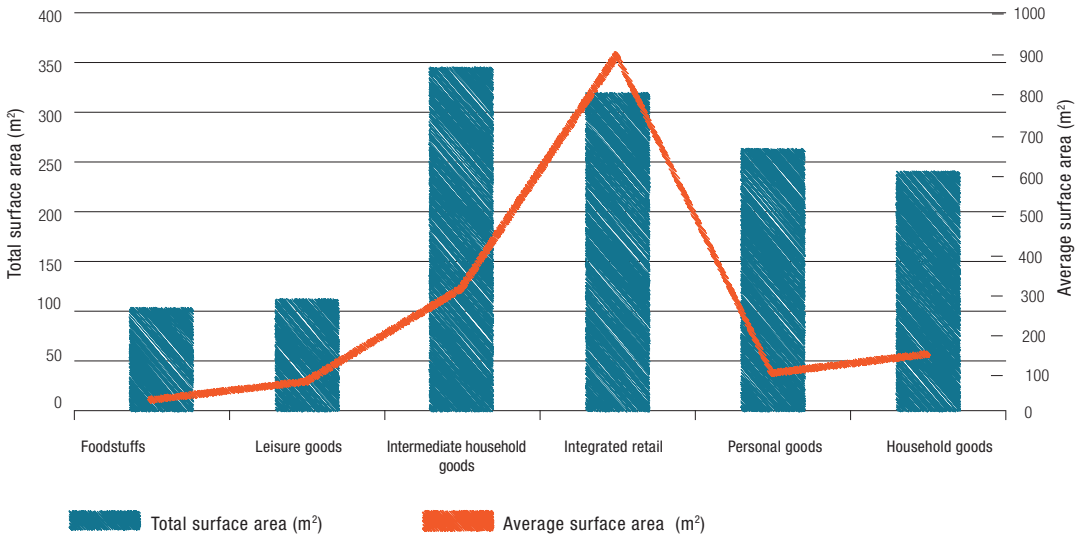
- the biggest consumers of space are integrated retail, which normally offers a wide range of goods, and intermediate household goods which handle which are often bulky (tiling or kitchen show rooms, etc.)
- retail trades demanding an average amount of space are personal and household goods
- small consumers of space include foodstuffs, leisure goods and personal goods.

18
The surface areas recorded by Locatus are the m2 occupied by sales and do not include storage areas, associated offices etc.

The total surface areas occupied by the different retail functions obviously also reflect the number of retail cells occupied by these functions.

However, the classification of functions by total surface area occupied and by the average surface area of the cells housing these functions is almost the same. The sole retail functions which form an exception to this rule are intermediate household goods and personal goods. In the latter case, the large number of cells occupied means that it exceeds the total surface area of household goods: it is a function for which both demand and profits are high.

Graphic 20
2009 |
Sale of goods



4.1.2. Preferred locations of retail functions by space consumption

Small consumers of space such as foodstuffs and leisure goods have a fairly stable average surface area, regardless of their location.

2009 |
Average surface areas by different retail locations

	Average surface area (m²)			
Types of retail functions	Nodes	Shopping	Stand-alone stores	TOTAL, BCR
Foodstuffs	40	35	39	39
Leisure goods	80	129	86	85
Intermediate household goods	297	653	639	471
Integrated retail	725	3.736	966	905
Personal goods	100	181	98	106
Household goods	125	348	189	154
TOTAL	123	275	187	153

The more space a goods type consumes, the more it will feel cramped in the spontaneous nodes where the plot division is outdated and only provides small retail spaces, short of joining several ground floor areas.

Retail trades demanding an average amount of space, such as personal and household goods, prefer retail nodes if they can be satisfied with the retail space available there. Those who wish to set up on larger surface areas choose to do so either outside the nodes, or in galleries or shopping centres: for the same product type, the average surface areas available in these locations are larger.

The most space-intensive retail types are intermediate household goods and integrated retail. Half of intermediate household goods are located in stand-alone stores, and half in retail nodes, but the surfaces they occupy are on average twice as large on stand-alone sites. Furthermore, in shopping centres integrated retail enjoys surface areas four to five times larger than in other retail areas.

2009 | Number of commercial cells selling different goods types by location

	Number of cells			
Types of retail functions	Nodes	Galleries & isolated shopping	Stand-alone stores	TOTAL, BCR:
Foodstuffs	1.238	39	1.344	2.621
Leisure goods	745	59	510	1.316
Intermediate household goods	358	7	365	731
Integrated retail	192	9	151	352
Personal goods	1.901	197	365	2.463
Household goods	954	40	560	1.554
TOTAL	5.388	351	3.295	9.037

2009 | Total surface areas of retail cells selling different goods types by location

	Total surface areas			
Types of retail functions	Nodes	Shopping	Stand-alone stores	TOTAL, BCR:
Foodstuffs	49.183	1.369	51.943	102.495
Leisure goods	59.818	7.628	43.850	111.296
Intermediate household goods	106.266	4.570	233.296	344.132
Integrated retail	139.111	33.620	145.854	318.585
Personal goods	190.939	35.562	35.781	262.282
Household goods	119.562	13.922	106.082	239.566
TOTAL	664.879	96.671	616.806	1.378.356

Finally, the most modern forms of retail area, such as shopping centres and galleries, host the largest surface areas for all retail functions except foodstuffs.

4.1.3. Preferred locations by space consumption in the different typological classifications of retail nodes.

Let us now take a closer look at the average surface areas occupied by these functions in the different typological classifications of retail nodes.

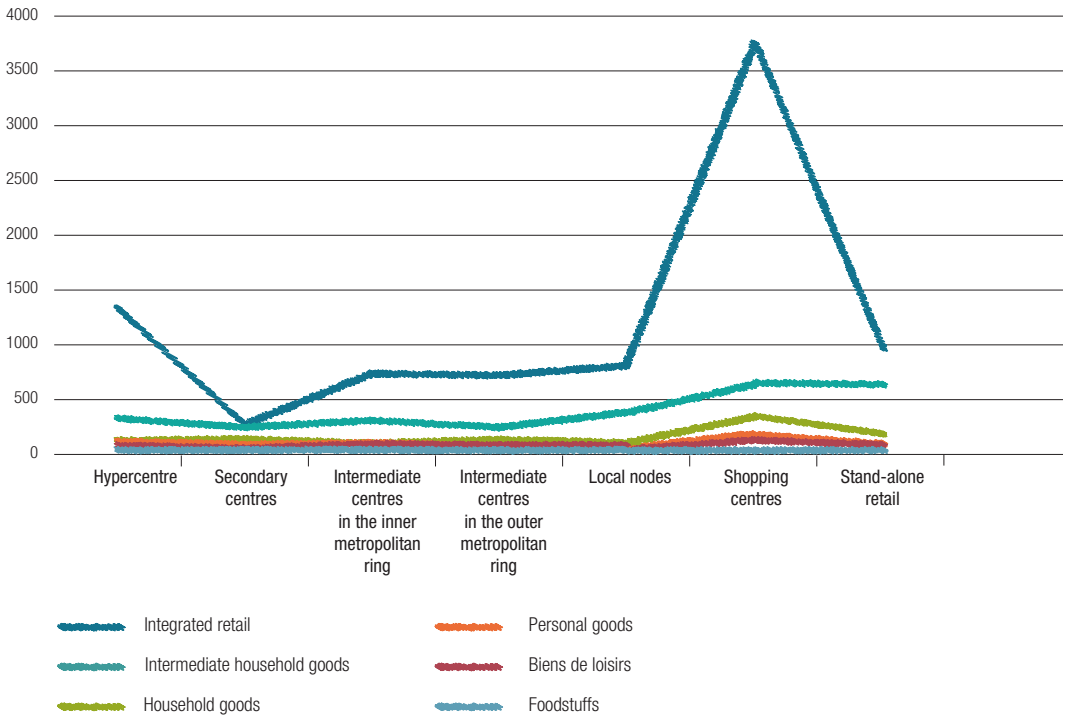
The average m^2 occupied in the sale of foodstuffs varies little in different retail areas.

The average surface areas occupied by the different retail functions are lowest in the intermediate centres in the outer metropolitan ring and in the secondary centres.

2009 | Average surface areas for different goods types by hierarchical level of retail nodes

Types of retail functions	Average surface areas							
	Hypercentre	Secondary centres	Interme-diate, inner metropoli-tan ring	Interme-diate, outer metropoli-tan ring	Local nodes	Shopping	Stand-alone stores	TOTAL, BCR
Foodstuffs	38	40	42	37	41	35	39	39
Leisure goods	82	55	96	85	87	129	86	85
Intermediate household goods	329	247	310	246	383	653	639	471
Integrated retail	1.337	272	737	721	810	3.736	966	905
Personal goods	116	90	104	75	64	181	98	106
Household goods	127	141	101	135	107	348	189	154
TOTAL	136	103	135	111	125	275	187	153

Graphic 21
Average surface areas for different goods types by hierarchical level of retail nodes



The average surface area recorded in stand-alone stores is virtually always higher than those measured in the different typology classes. This is in part because there is less competition for space than in the retail corridors, and a lower price per m^2.

The hypercentre, galleries and isolated shopping centres offer high average surface areas to all functions, and very high in the case of integrated retail. This clearly corresponds to the requirements of the most modern forms of retail.

4.2. Independent traders versus chains

In general, retail is organised by two status types, either by independent retailers or by a multitude of networks of very varied structures which we will call 'chains'[19] for simplicity's sake.

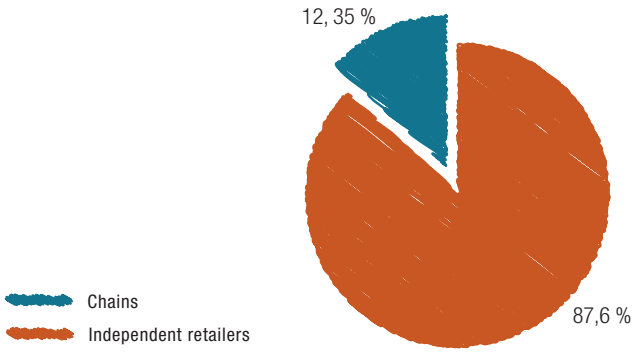
The data base provides almost all the information relating to the status of retailers in both sales and services.

4.2.1. Retail in the Brussels region by retailer occupation status

2009 | Retail establishments by retailer occupation status

Status	No of retail establishments	% of retail establishments
Independent	17.549	87,65 %
Chains	2.473	12,35 %
Total:	20.022	100 %

Graphic 22 Retail establishments by retailer occupation status



With 2,675 of the 20,022 stores and retail services establishments in Brussels, retail chains represent 13 % of the retail stock, or nearly one shop in eight. This means that more than 85 % of retail cells in the capital are still run by independent retailers.

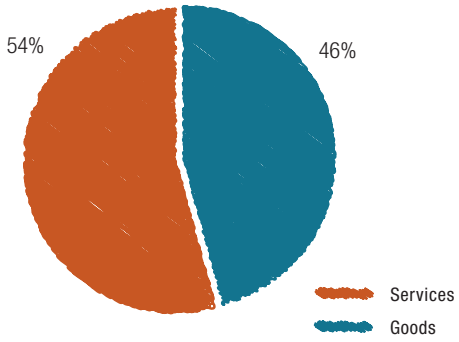
19
Locatus defines as a chain belonging to a network any store permanently associated with others under a single brand name in a contractual relationship, franchise, affiliation, concession, management lease, or associate in a cooperative.

4.2.2. Sale of goods and services by retailer occupation status

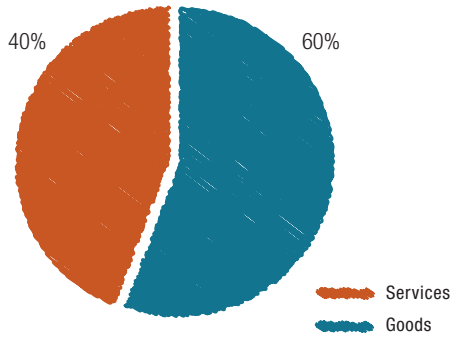
406 different chains occur at least once in the region.

The majority of independent retailers are active in the sale of services, while most chains are active in the sale of goods.

Graphics 23 | 24
2009 | Independent retails



2009 | Chains



Independent retailers account for 90% of the sale of services, but less than 85% of the sale of goods.

2009 | Sale of goods and services by retailer occupation status

Status	Goods		Services	
	No of retail establishments	% of retail establishments	No of retail establishments	% of retail establishments
Independent retailers	8.012	84,20 %	9.537	91 %
Chains	1.496	15,80 %	977	9 %
Total:	9.508	100 %	10.514	100 %

4.2.3. Retail functions by retailer occupation status

Let us now take a closer look at this division between 'independent retailers' and 'chains' in terms of the type of goods and services concerned.

4.2.3.1. Independent

72 % of independent retailers are active in just four sectors: catering, personal services, foodstuffs and personal goods.

2009 | Retail functions by retailer occupation status

Independent retailers by retail type	No of retail establishments	% of retail establishments
Foodstuffs	2.459	14,0 %
Leisure goods	1.091	6,2 %
Intermediate household goods	657	3,7 %
Fuel and transport goods	306	1,7 %
Integrated retail	111	0,6 %
Personal goods	1.984	11,3 %
Household goods	1.404	8,0 %
Catering	5.032	28,7 %
Personal services	3.185	18,1 %
Other types of service	1.320	7,5 %
Total:	17.549	100,0 %

4.2.3.2. Chains

51.3% of chains are active in just two activity types: services other than personal services, and the sale of personal goods.

2009 | Chains by retail type

Chains by retail type	No of retail establishments	% of retail establishments
Foodstuffs	162	6,60 %
Leisure goods	225	9,10 %
Intermediate household goods	74	3,00 %
Fuel and transport goods	165	6,70 %
Personal goods	241	9,70 %
Household goods	479	19,40 %
Integrated retail	150	6,10 %
Catering	108	4,40 %
Personal services	81	3,30 %
Other types of service	788	31,90 %
	2.473	100,00 %

For chains, the heading 'other services of a commercial nature', which includes banks, employment agencies and estate agencies, leads the services category by some distance.

'Personal goods' dominates the 'sale of goods' category.

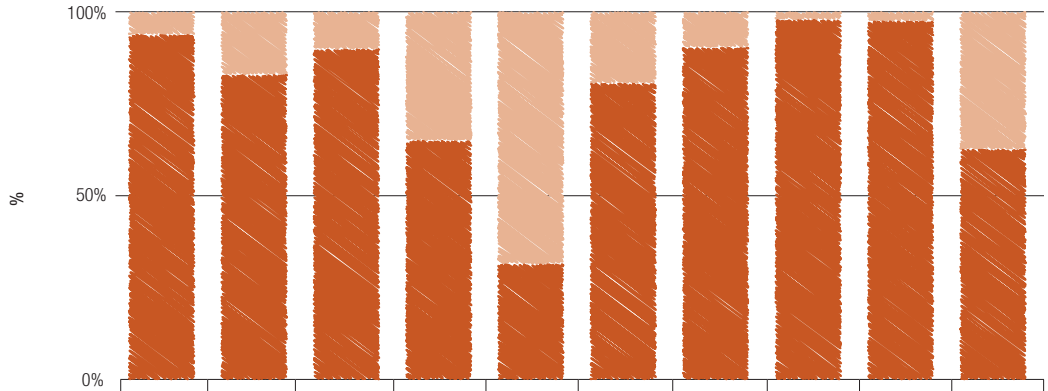
4.2.3.3. Independent retailers versus chains

Let us now compare the two tables:

2009 | Status by retail type

Status by retail type	Independent retailers	% Independent retailers	Chains	% Chains
Foodstuffs	2.459	93,80 %	162	6,20 %
Leisure goods	1.091	82,90 %	225	17,10 %
Intermediate household goods	657	89,90 %	74	10,10 %
Fuel and transport goods	306	65,00 %	165	35,00 %
Integrated retail	111	31,50 %	241	68,50 %
Personal goods	1.984	80,60 %	479	19,40 %
Household goods	1.404	90,30 %	150	9,70 %
Catering	5.032	97,90 %	108	2,10 %
Personal services	3.185	97,50 %	81	2,50 %
Other types of service	1.320	62,60 %	788	37,40 %
	17.549	87,60 %	2.473	12,40 %

Graphic 25
2009 | Status by retail type



	Foodstuffs	Leisure goods	Intermediate household goods	Fuel and transport goods	Integrated retail	Personal goods	Household goods	Catering	Personal services	Other types of services
% chain	6.20%	17.10%	10.10%	35.00%	68.50%	19.40%	9.70%	2.10%	2.50%	37.40%
% independent	93.80%	82.90%	89.90%	65.00%	31.50%	80.60%	90.30%	97.90%	97.50%	62.60%

4.2.4 Surface areas occupied by retail cells in the sale of goods: independent retailers versus chains

4.2.4.1 Distribution of number of cells occupied by independent retailers and chains in the sale of goods

Independent retailers occupy more than 80% of cells in every type of goods with the exception of the integrated retail sector.

2009 | Proportion of cells occupied by independent retailers and chains in the sale of goods

	Independent retailers		Chains		Total	
Type of goods	No of cells	% of cells	No of cells	% of cells	No of cells	%
Foodstuffs	2.459	93,82 %	162	6,18 %	2.621	100,0 %
Leisure goods	1.091	82,90 %	225	17,10 %	1.316	100,0 %
Intermediate household goods	657	89,88 %	74	10,12 %	731	100,0 %
Integrated retail	111	31,53 %	241	68,47 %	352	100,0 %
Personal goods	1.984	80,55 %	479	19,45 %	2.463	100,0 %
Household goods	1.404	90,35 %	150	9,65 %	1.554	100,0 %
	7.706	85,27 %	1.331	14,73 %	9.037	100,0 %

4.2.4.2 Distribution of surface areas occupied by independent retailers and chains in the sale of goods

The ratios are very different if we turn instead to the surface areas occupied: independent retailers remain in first place for the specialist food sectors, the average surface area of these stores being relatively similar for each status.

For the other categories of goods sold, taking account of the surface areas occupied significantly changes the weight of each status.

2009 | Distribution of surface areas occupied by independent retailers and chains in the sale of goods

	Independent retailers	Chains		
Types de biens	% m² occupied	% m² occupied	Total	average m²
Foodstuffs	93.60 %	6.40 %	100 %	39
Leisure goods	61.90 %	38.10 %	100 %	82
Intermediate household goods	84.30 %	15.70 %	100 %	400
Integrated retail	9 %	91 %	100 %	317
Personal goods	51.60 %	48.40 %	100 %	42
Household goods	66.50 %	33.50 %	100 %	138
	56.50 %	43.50 %	100 %	

4.2.4.3. Average m² surface areas occupied by independent retailers and chains in the sale of goods.

The average m² for functions operated by the chains are between one and five times higher than those same functions operated by independent retailers.

2009 | Average m² occupied by independent retailers and chains in the sale of goods

	Independent retailers		Chains		ratio m² chains/ independent retailers	
Type of goods	No of retail establishments	No m²	Average m²	No of retail establishments	No m²	Average m²
Foodstuffs	2.459	95 934	39	162	6.561	41
Leisure goods	1.091	68 892	63	225	42 404	188
Intermediate household goods	657	290 071	442	74	54 061	731
Integrated retail	111	28 608	258	241	289.917	1.203
Personal goods	1.984	135 419	68	479	126.781	265
Household goods	1.404	159 382	114	150	80 184	535
	7.706	778.306		1331	599.908	

4.2.5. The location of independent retailers and chains in the different retail areas

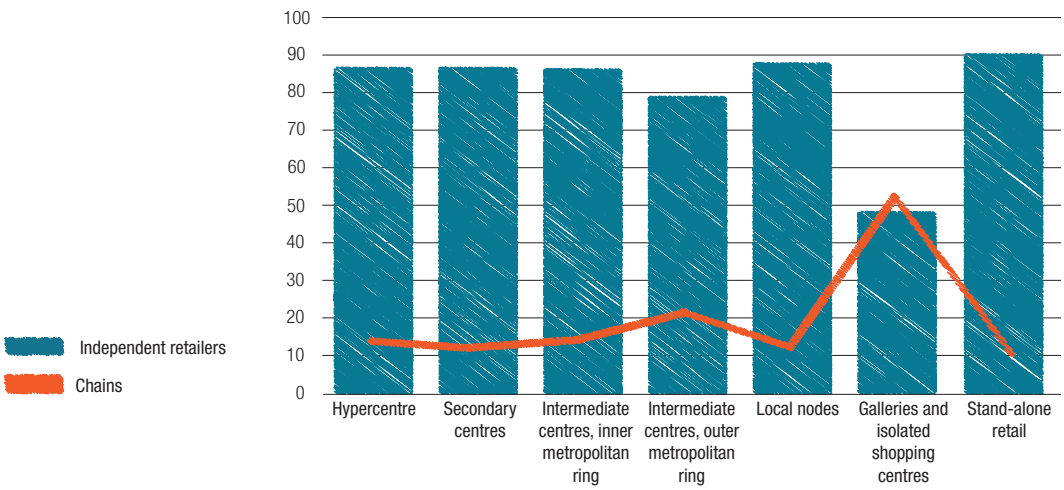
Independent retailers form an obvious majority in the various spontaneous retail spaces such as retail nodes and stand-alone stores. However, they are in a slight minority in galleries and isolated shopping centres.

2009 | Location in different retail areas by status

		Independent retailers	% Independent retailers	Chains	% Chains	Total
Retail nodes	Hypercentre	3.267	86,40 %	514	13,60 %	3781
	Secondary centres	1.976	88,20 %	264	11,80 %	2240
	Intermediate centres, inner metropolitan ring	1.694	86,00 %	276	14,00 %	1970
	Intermediate centres, outer metropolitan ring	1.173	78,70 %	318	21,30 %	1491
	Local nodes	1.091	87,60 %	155	12,40 %	1246
Galleries and isolated shopping centres		251	48,00 %	272	52,00 %	523
Stand-alone stores		7.895	90,01 %	876	9,99 %	8.771
Brussels region		17.549	87,65 %	2.473	12,35 %	20 022

It will be noted that the percentage of chains is twice as high in intermediate centres in the outer metropolitan ring than in the other types of commercial node corridors. Intermediate centres in the outer metropolitan ring meet the same needs as those in the inner metropolitan ring, but they are situated in districts where incomes are higher.

Graphic 26
2009 | Proportion of independent retailers and chains in the typology of retail areas



4.3. Empty retail premises [20]

4.3.1. Number of cells for sale or lease

960 vacant retail premises were identified by the consultant. The definition of unoccupied cells used by Locatus differs from the definition used in the 1997 survey. A comparison with the number of vacant premises recorded in the 1997 survey by the Administration is not therefore possible; many retail premises which were vacant at that date have been converted into housing or office space and are no longer included in the Locatus data base.

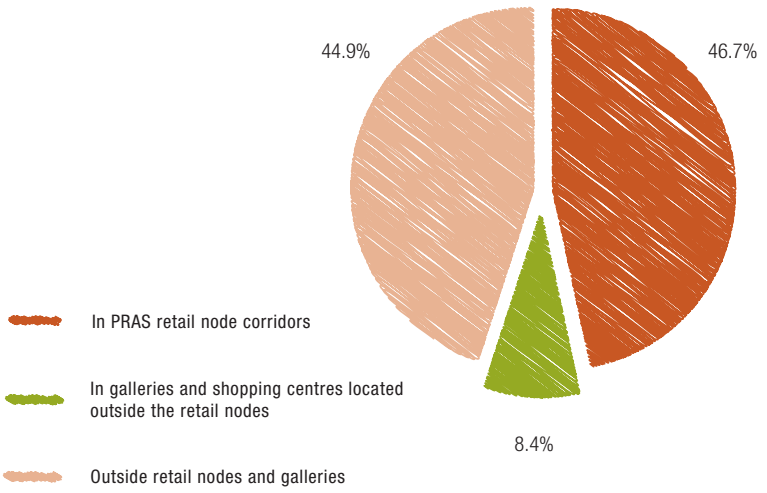
4.3.2. Location of cells for sale or let

The highest number of vacant retail cells are situated in the retail node corridors and in the stand-alone retail areas.

2009 | Location of cells which are vacant or to let

	Number of vacant cells	% of vacant cells
Within the PRAS retail node corridors	448	46,70 %
In galleries and shopping centres situated outside retail nodes	81	8,40 %
Outside retail nodes and galleries	431	44,90 %
	960	100 %

Graphic 27
2009 | Proportion of independent retailers and chains in the typology of retail areas



If we compare the percentage of vacant cells with the percentage of occupied retail cells in these three retail area types, we can see that galleries and shopping centres have a higher proportion of cells for sale or to let. This is without doubt due to the current renovation of the galleries at Toison d'Or and Ravenstein.

It is also the case that the ratio of vacant to occupied cells is higher outside the retail node corridors than it is within the corridors. But these figures are very dependent on the methodology adopted by Locatus for its survey of vacant cells which is more rigorous when designating a space as vacant in stand-alone retail than in the retail node corridors, no doubt because vacant spaces in stand-alone retail are less sought-after by future traders, the potential customers of the survey's author.

20
A commercial building is recorded as vacant in the Locatus data base, if: It can be reasonably expected that these (unoccupied) premises will in the future be occupied by a sales point in the field of retail sales, catering or consumer services. The following also applies:
In a retail zone:
• The building was previously used as a store and is at present effectively empty; or,
• The building is no longer used at present as a store or as a catering establishment, but it carries a sign advertising it for sale or lease as a sales point.
Outside retail zones:
these two criteria must apply. Therefore, there must have previously been a sales point, and there must be a 'for sale or lease' or 'sold/leased' sign on the build-ing.

2009 | Proportion of occupied cells in the different retail areas

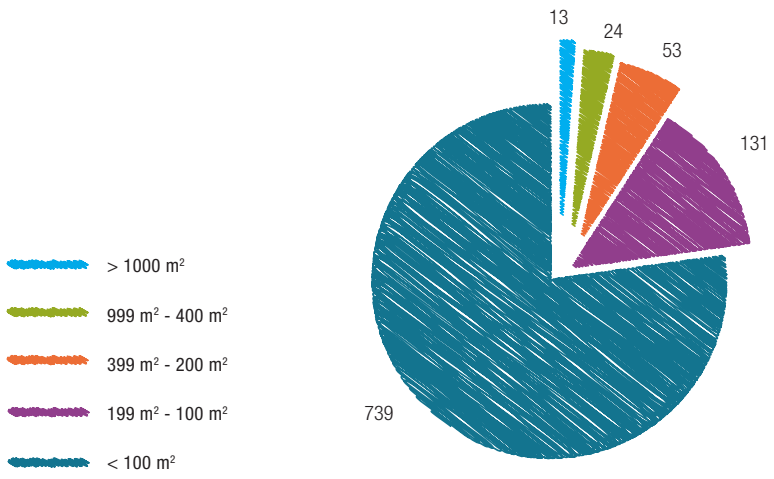
	% of vacant cells in relation to number of occupied cells
In and outside the PRAS retail node corridors	4 %
In galleries and shopping centres situated outside retail nodes	16 %
Outside retail nodes and shopping centres	5 %
Regional average	5 %

4.3.3. Size of cells for sale or to let

The consultant reported more than 95,000 m² of vacant cells.

The vacant cells recorded in 2009 very largely, in almost 97% of cases, represented a surface area below 400 m². Only 37 vacant spaces larger than 400 m² were recorded by the consultant in the areas where retail is present.

Graphic 28
2009 | Number of vacant cells by surface area



4.3.4. Location of cells for sale or to let

The total surface area is distributed as follows.

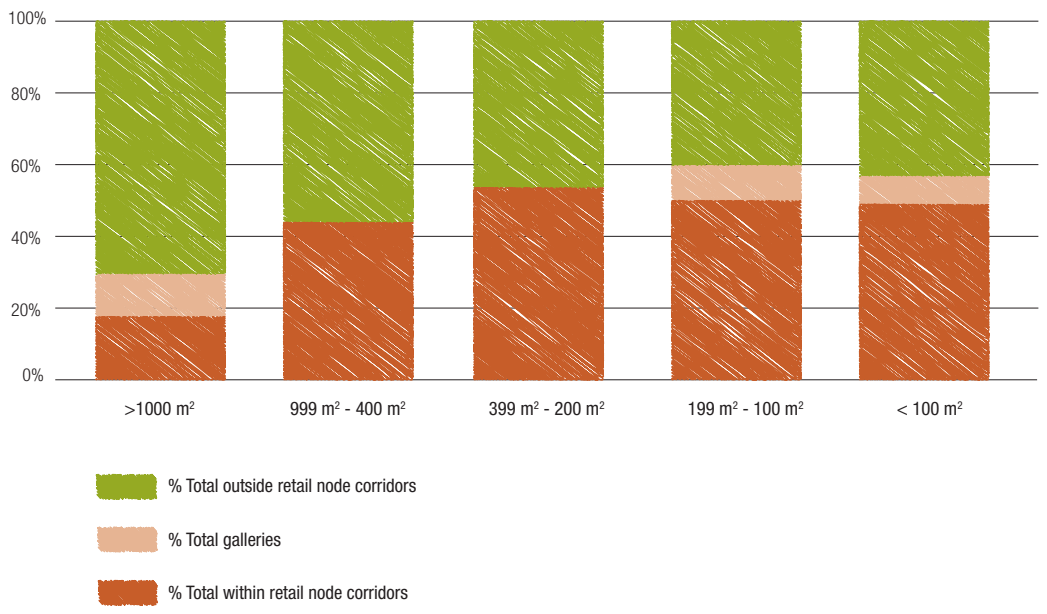
Location of vacant m² by retail area

M² vacant surfaces	Total in retail node corridors	Total in shopping centres	Total outside retail node corridors	Total
> 1000 m²	3000	2020	12 050	17 070
999 m² - 400 m²	5707	0	7314	13 021
399 m² - 200 m²	7228	0	6282	13 510
199 m² - 100 m²	8371	1648	6755	16 774
< 100 m²	17 000	2724	15 055	34 779
Total	41 306	6392	47 456	95 154

The surface areas in these vacant cells are located both in the retail node corridors and in the rest of the region.

The largest available surface areas, and the surface areas above 400 m², are outside the retail node corridors. Surfaces below 400 m² are mainly available in the retail node corridors.

Graphic 29
2009 |
% of vacant cells within retail node corridors, outside retail node corridors and in shopping centres



5. Conclusion

Retail in the Brussels region is an important function for the attractiveness of the region. It is also a major source of employment. Last but not least, it supplies the needs of the residents of Brussels.

The limits of the Observatory's data only enable us to assess this third aspect.

The purpose of shopping is to satisfy day-to-day and less frequent or exceptional needs.

The region's retail network makes it possible to meet these needs across the whole territory. It needs to be strengthened.

It is ceaseless changing to respond to evolving supply and demand. The period 1997-2005 saw growth of 0.4% within the retail node corridors, while 2005-2009 suffered an average annual decline of -2.3%. The period 1997-2009 recorded a decline of 0.5%.

It is clear that retail activity is not a long quiet river. The number of retail cells is in constant decline in a majority of functions.

The phenomenon is at work at every level of the retail network in the Brussels region. However, it particularly affects stand-alone stores, which saw an average annual decline of 1.9% between 1997 and 2009, more than four times the average annual decline recorded in all retail corridors in the same period. B. Merenne-Schoumaker speaks of the 'decline in intermediate retail areas, endangering the social role of local retail'[21]

The reasons for the decline in cells occupied by a retail function are many: changing consumer behaviour, both in purchasing and in their spatial conduct, which weakens cells located outside the main traffic flows; the restructuring of some sectors; the rise in e-commerce and the reduction in average household consumption.

This observation is already well-established, as witnessed by the fact that the retail issue was addressed as a matter of major concern during the first draft regional development plan in 1994.

The options for action focused on:

- the quality and organisation of public open spaces
- improving the comfort of shoppers, inter alia by providing adequate access by public transport and by car
- a system of commercial district agreements, to mobilise funds from various sources and to coordinate them in an integrated development project.

The attractiveness of retail areas, for both shoppers and traders, and the improvement of their quality, is the mission that the government entrusted to Atrium, an agency created to implement the commercial district agreements.

21
B. Merenne-Schoumaker, 2003
Géographie des services et des commerces,
Presse universitaire de Rennes

The agency is currently active in the enhanced housing and renovation development areas (EDRLR). After assessing its strengths and the adequacy of its resources, its scope should be extended to enable to take into account the problems of districts situated outside its existing sphere of activity.

While the attractiveness of a retail area and the comfort of pedestrians are essential if shoppers are to take a degree of pleasure in making their purchases, the accessibility of these areas is critical if they are to visit them.

The road and public transport networks, and the office, school and cultural infrastructure, structure the space and the consumer's mobility chain. Traffic flows encourage the visibility of retail activities. We[22] speak of 'passing attraction, defined in opposition to polar attraction' to describe the flow of customers whose attention is grabbed by points of contact during a shopping trip without being resident in the area.

The concept of 'passing' attraction is illustrated by the convenience stores located in petrol stations, which more and more frequently offer convenience goods (sandwiches, bread and newspapers) as well as impulse buys (sweets and drinks). Commuters using public transport will also enjoy an increasing range of goods and services in metro and railway stations.

But the accessibility of retail areas depends vitally on the ability to stop there, in other words on having somewhere to park cars and bikes. The policy of providing short-term car parks seems to encourage flows in nodes where these are lacking, and should be made more widespread.

Alongside the moves to refocus on the most important levels of the network, there is also something of a return to a local approach, as evidenced by the multiplication of small branches opened by the megastore chains in local areas, and the rising number of grocers in the retail corridors and in stand-alone areas.

Given the ageing population, the rising cost of fuel and the need for sustainable well-being, there is a case for asking whether it would be appropriate to encourage the existence of small local nodes in the interstices of the retail network.

During the development of residential projects of a certain size, quotas of additional functions, including local shops, could be established.

In view of the considerable loss of retail cells, which also represents a loss of employment, it would be helpful to understand the different reasons for closure, and to help to hand them on where that would be useful.

In a previous edition of the Observatory, Professor Grimmeau (IGEAT-ULB) suggested asking traders about their reasons for closing their businesses:

- obsolescence
- the inherent difficulties of the business
- age of the trader
- the difficulties in handing the business on
- lack of management expertise
- competition
- location
- lack of profitability

Finally, the prospect of regionalising powers under the 'IKEA' law and the necessary revision of its criteria under the European Services Directive require us to think afresh about the planning and land-use criteria for large-scale retail projects.

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Aurélia MICHAUD-TREVINAL C.R.E.R.E.G. UMR CNRS 6585 IGR-IAE, Université de Rennes 1 and Gérard CLIQUET C.R.E.R.E.G. UMR CNRS 6585 IGR-IAE, Université de Rennes 1 - *5ème colloque Etienne THIL 26 et 27 septembre 2002 - Localisation commerciale et mobilité du consommateur*

6 Annexes

ANNEX 1 Hierarchy of retail node corridors

Typology	PRAS map nº	Name of retail node corridors
Hypercentre	7	Stalingrad-Lemonnier
Hypercentre	8	Dansaert-Saint Géry
Hypercentre	10	Flandre-Sainte Catherine
Hypercentre	11	City centre
Hypercentre	12	Marché aux Herbes
Hypercentre	13	Grand Place
Hypercentre	3	Boulevard de Waterloo
Hypercentre	39	Louise District
Hypercentre	60	Toison d'Or
Hypercentre	61	Porte de Namur
Hypercentre	1	Marolles
Hypercentre	2	Sablon
Hypercentre	4	Ravenstein
Hypercentre	5	Congrès
Hypercentre	33	Midi
Hypercentre	77	Luxembourg
Hypercentre	1001	Progrès
Hypercentre	1002	Mérode
Hypercentre	14	Dansaert
Secondary centre	19	Marie Christine
Secondary centre	25	Molenbeek Centre
Secondary centre	32	Wayez
Secondary centre	36	Quartier du Triangle
Secondary centre	41	Bailly-Vleurgat
Secondary centre	47	Uccle Centre
Secondary centre	94	Place Saint Josse
Secondary centre	102	Rue de Brabant
Secondary centre	105	Helmet
Intermediate centre, inner metropolitan ring	23	Charles Quint
Intermediate centre, inner metropolitan ring	26	Karreveld
Intermediate centre, inner metropolitan ring	28	Chaussée de Ninove
Intermediate centre, inner metropolitan ring	31	Chaussée de Mons
Intermediate centre, inner metropolitan ring	35	Saint Gilles Centre
Intermediate centre, inner metropolitan ring	38	Janson
Intermediate centre, inner metropolitan ring	40	Louise-Lesbroussart
Intermediate centre, inner metropolitan ring	43	La Bascule

Typology	PRAS map nº	Name of retail node corridors
Intermediate centre, inner metropolitan ring	44	Rue Vanderkindere
Intermediate centre, inner metropolitan ring	45	Place Vanderkinderen
Intermediate centre, inner metropolitan ring	58	Chaussée de Waterloo
Intermediate centre, inner metropolitan ring	62	Flagey
Intermediate centre, inner metropolitan ring	79	Place Jourdan
Intermediate centre, inner metropolitan ring	81	La Chasse
Intermediate centre, inner metropolitan ring	84	Avenue des Celtes
Intermediate centre, inner metropolitan ring	85	Rue de Tongres
Intermediate centre, inner metropolitan ring	95	Chaussée de Haecht
Intermediate centre, inner metropolitan ring	96	Rue de la Prairie
Intermediate centre, inner metropolitan ring	97	Dailly-Chazal
Intermediate centre, inner metropolitan ring	101	Royale Sainte-Marie
Intermediate centre, outer metropolitan ring	15	Wand
Intermediate centre, outer metropolitan ring	16	Vekemans
Intermediate centre, outer metropolitan ring	18	Houba de Strooper
Intermediate centre, outer metropolitan ring	20	Miroir
Intermediate centre, outer metropolitan ring	24	Docteur Schweitzer
Intermediate centre, outer metropolitan ring	34	Bizet
Intermediate centre, outer metro-politan ring	46	Etoile-Coghen
Intermediate centre, outer metropolitan ring	52	Vivier d'Oie
Intermediate centre, outer metropolitan ring	53	Fort Jaco
Intermediate centre, outer metropolitan ring	56	Place Saint-Denis
Intermediate centre, outer metropolitan ring	65	Cimetière d'Ixelles
Intermediate centre, outer metropolitan ring	69	Place Keym
Intermediate centre, outer metropolitan ring	76	Wavre-Souverain
Intermediate centre, outer metropolitan ring	86	Avenue Georges Henri
Intermediate centre, outer metropolitan ring	93	Place Dumon
Intermediate centre, outer metropolitan ring	70	Place Wiener
Local nodes	9	Van Artevelde
Local nodes	21	Léon Théodore
Local nodes	22	Werrie (Belgica)
Local nodes	27	Duchesse de Brabant
Local nodes	29	Ninove-Mettewie
Local nodes	30	Ropsy Chaudron
Local nodes	37	Bethléem
Local nodes	48	de Fré
Local nodes	49	Place Saint Job
Local nodes	50	Langeveld
Local nodes	51	Vert Chasseur
Local nodes	55	Altitude Cent
Local nodes	59	Brugmann
Local nodes	63	Germoir
Local nodes	64	Gare d'Etterbeek
Local nodes	66	Petite Suisse
Local nodes	67	Buyl
Local nodes	68	Rue Gilbert
Local nodes	71	Pinoy

Typology	PRAS map n°	Name of retail node corridors
Local nodes	72	Chaussée de Wavre
Local nodes	73	Saint-Julien
Local nodes	74	Keyen-Stauwen
Local nodes	75	Wavre-Watermael
Local nodes	78	Archimède
Local nodes	80	Sainte Gertrude
Local nodes	82	Pervyse
Local nodes	83	Escadron
Local nodes	87	Rue Tomberg
Local nodes	88	Place Verheylewegen
Local nodes	89	Place Saint-Lambert
Local nodes	90	Place des Mayeurs
Local nodes	91	Rue au Bois
Local nodes	100	Rue Josaphat
Local nodes	104	Cage aux Ours
Local nodes	106	Avenue H. Conscience
Local nodes	107	Place de la Paix
Local nodes	108	Louvain-Paduwa
Local nodes	981	Louvain-Meiser
Local nodes	982	Louvain-Meiser
Local nodes	1000	Dixmude-Ypres

ANNEX 2
List of goods and services experiencing growth or in decline

Goods experiencing growth between 1997 and 2009	
Undefined retail	fuel and transport goods
Integrated retail	multi-purpose
Commodity products	health foods
Commodity products	decorative furnishings
Commodity products	DIY centre
Commodity products	mobile telephony
Commodity products	grocers, general food stores
Comparison products	building materials
Comparison products	wool and hosiery
Comparison products	toys and games
Comparison products	dressmaking fabric
Selective products	cycles and motorbikes
Selective products	IT products (retail)
Goods experiencing growth between 2005 and 2009	
Commodity products	chocolatier and similar
Commodity products	health and beauty, cleaning products
Comparison products	Crockery and tableware
Comparison products	garden articles
Selective products	collectors' items
Selective products	artists' materials
Commodity products	other articles
Comparison products	umbrellas, hats and gloves
Comparison products	porcelain, crystal, luxury household goods
Comparison products	fuel and service stations

Services experiencing growth between 1997 and 2009	
Other types of retail service	other
Other types of retail service	estate agency (agency with shop window)
Complementary products	cafeteria, snacks, fast-food
Complementary products	restaurant
Commodity products	car wash
Comparison products	beauty care, sauna, tanning centre
Personal services	personal goods and services: other
Personal services	hairdressers
Personal services	opticians
Services experiencing growth between 2005 and 2009	
Other types of retail service	discothèque, dance halls
Selective products	animal grooming
Personal services	shoe repairs, locksmith, engraver, tailor
Other types of retail service	lottery, bookmaker
Personal services	laundrette
Goods in decline between 1997 and 2009	
Undefined retail	retail, restaurant and café
Undefined retail	specialist
Complementary products	tobacconist
Commodity products	bakeries, patisserie
Commodity products	butcher, charcuterie
Commodity products	fish and seafood
Commodity products	cheesemongers, dairy products milk, delicatessen
Commodity products	game, poultry, tripe
Commodity products	souvenirs, gifts
Commodity products	florist
Commodity products	newspapers
Comparison products	bed linen, rugs, fitted carpet
Comparison products	pictures, furnishing fabrics, wallpapers
Comparison products	tiling, sanitary fittings
Comparison products	hardware, plumbing
Comparison products	domestic electrical goods, kitchen equipment
Comparison products	TV, hi-fi
Comparison products	jewellery, clock and watch making
Comparison products	haberdashery
Comparison products	leather goods
Comparison products	music store
Comparison products	car/motorbike/bicycle accessories
Selective products	gunsmiths, hunting and fishing
Selective products	domestic pets and associated goods
Selective products	other (Leisure other no equivalent in Locatus)
Selective products	camping and scouting articles
Goods in decline between 2005 and 2009	
Undefined retail	household equipment and maintenance
Undefined retail	leisure and cultural goods
Commodity products	late-opening general stores
Commodity products	wines and spirits
Comparison products	shoes
Comparison products	perfumery, beauty products

Comparison products	fuel (sale of heating oil)
Selective products	miscellaneous arts
Undefined retail	personal goods and services
Integrated retail	general stores
Commodity products	food and drink
Commodity products	photographers
Comparison products	furniture
Comparison products	light fittings and electricity, heaters
Comparison products	household equipment and maintenance
Comparison products	clothes, lingerie
Comparison products	sports equipment
Selective products	antiques, second-hand goods
Selective products	musical instruments
Services in decline between 1997 and 2009	
Other types of retail service	bank branches
Other types of retail service	travel agencies
Other types of retail service	copy-shop, printing centres
Other types of retail service	video rental, amusement arcade
Complementary products	café, bar, drinks outlet
Commodity products	pharmacy, herbalist
Comparison products	tyres, specialist instant service
Services in decline between 2005 and 2009	
Other types of retail service	temporary employment agency
Other types of retail service	peep-show
Other types of retail service	other
Other types of retail service	private telephone and fax centre
Complementary products	other types
Undefined retail	other types of retail service
Complementary products	waffles, ice-cream parlour, tea-room, crêperie
Comparison products	other (other fuel)
Personal services	funeral directors

ANNEXE 3
Classification of retail businesses by purchasing behaviour typology

Classification of retail businesses by type of purchasing behaviour
Commodity products
junk shop, bric-à-brac, discount store
bakeries, patisserie
chocolatier and similar
butcher, charcuterie
fish and seafood
cheesemongers, dairy products milk, delicatessen
grocers, general food stores
late-opening general stores
health foods
wines and spirits
other articles
game, poultry, tripe
decorative furnishings
souvenirs, gifts
florist
mobile telephony, telephones
DIY centres
health and beauty, cleaning products
pharmacy, herbalist, orthopaedic aids
bookshop, stationer, cards, second-hand booksellers, comic books
photographers
newsagents
car wash
Comparison products
furniture
domestic electrical goods, kitchen equipment
TV, hi-fi
Crockery and tableware
other capital goods
porcelain, crystal, luxury household goods
bed linen, rugs, fitted carpets, curtains, parquet
pictures, furnishing fabrics, wallpapers
tiling, sanitary fittings
Hardware, plumbing
light fittings and electricity, heating equipment
garden articles
builders' merchants
frames, doors, ceilings, partitions
other
clothes, lingerie, baby articles
shoes
jewellery, clock and watch making
perfumery, beauty products
haberdashery
dressmaking fabric
leather goods
umbrellas, hats and gloves
wool and hosiery
beauty care, sauna, tanning centre

sports equipment
music store
toys and games
fuels
fuel and service stations
car sales
car/motorbike/bicycle accessories
tyres, specialist instant service
Selective products
antiques, second-hand goods
miscellaneous arts
IT products (retail)
gunsmiths, hunting and fishing
pets and associated goods
musical instruments
artists' materials
other leisure and cultural goods
camping and scouting articles
other
collectors' items
cycles and motorbikes
Complementary products
restaurant
cafeteria, snacks, fast-food
chip shop
waffles, ice-cream parlour, tea-room, crêperie
café, bar, drinks outlet
other type
delicatessen
tobacconist
Integrated retail
multi-purpose
general stores

7 Liste of graphics

Rédaction | Redactie | Editor
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On the initiative of and supervised by the Brussels Capital Region (BCR)

Dépôt légal | Wettelijk depot
D/2012/9210/4


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| Retail Observatory | Observatoire du commerce | Overzicht van de han
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