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ABSTRACT: Retail facilities are a critical element of urban form often given insufficient consideration by the planning profession. While retail form has implications for matters such as consumer accessibility, quality of service and transport patterns and has been the subject of investigations overseas, there have been comparatively few investigations into the nature of retail form in Australia and the factors that shape that form. Elements to be considered include the spatial distribution, location and ownership of retailing as well as the diversity and number of shops. Using a variety of secondary documentary and other sources this paper seeks to examine retail form in Brisbane and Melbourne. Initial impressions suggest that Melbourne may have retained a greater number of traditional strip shopping centres, while Brisbane appears to have a greater number of corporately owned shopping malls. The research will aim to build a profile of each city's retail form, within the limitations of available data, before attempting to suggest reasons for variation found in the development of retail in both cities. Later research will investigate the extent to which planning strategies, heritage protection or other forms of planning regulation may have shaped the retail landscape.

Introduction

Retail facilities are a critical element of urban form somewhat neglected by planning scholars in Australia. Retailing is not only a part of the built form it provides a necessary service which almost every person utilises, and contributes to the identity and sense of place of communities. Everybody, or at least every household, must shop to acquire food and other necessary goods, and this is often an important social activity. Retail centres are the public spaces of our communities, where we meet the people we live amongst and have contact with strangers and friends alike. Retailing is a highly visible activity and in many ways the public face of a city. Shopfronts are what people see as they walk around. Streets that are lined with good quality shops will be lively and attractive places, drawing in many people who, once there, may undertake other activities. Retailing is therefore important to the culture and public life of a city.

The value of retail as a people attractor providing vitality, interest and safety has been widely recognised since Jane Jacobs' impassioned defence of mixed-use, crowded city streets in (1961). She considered that retailing gives people a reason to walk and to encounter places that would not in themselves be attractions, thus spreading a sense of activity around. The idea that the activity generated by retailing adds to sense of community and social contact by providing activity in the public spaces of the streets has been reinforced in more recent times by advocates of pedestrianised public spaces, new urbanist and transit-oriented developments (Gehl, Gemzøe et al. 1999; Duany, Plater-Zyberk et al. 2000; Cervero 2004; Dittmar and Ohland 2004).

The form and location of retailing also affects the manner in which people travel to it. It is a major generator of trips, both for shoppers and also for the significant number of people that work in retailing. As the imperative to reduce car dependency is slowly moving up the priority

list of planning goals, the encouragement of forms of retailing which decrease car dependency must become more urgent. It is unfortunate in this regard that the ubiquitous car based shopping mall has become the standardised form of new retail development in very many countries around the globe, including Australia (Goodman and Coote 2007). The chief characteristics of this style of development are that it is centrally controlled through corporate ownership or management, generally has an enclosed and inward looking urban form, and is designed to be accessed by car, with ample parking space provided. Such shopping malls tend to be located on major arterial roads away from other retail and commercial uses and, because of their size and design, integrate very poorly with surrounding areas. Their existence and continual expansion has a negative impact on pre-existing and older forms of retailing.

A report into issues surrounding the spread of the shopping mall in Brisbane noted that well located traditional strip shopping centres offered a range of services missing from the shopping mall such as libraries, post offices, health services and banks, while "free standing centres are narrowly focussed and fail to provide a comprehensive range of complementary facilities" (DBIRD 1991 p. iv,5). A great many countries have now moved to regulate against out-of-centre shopping malls in order to protect the viability of existing multiple ownership town centres and protect access to goods and services of people without cars (Bromley and Thomas 1993; Laursen 1997; Evers 2002). Countries such as Britain with its policy known previously as PPG6, now PPS6 (Office of the Deputy Prime Minister 2005), the Netherlands, Denmark, France, Germany and Belgium have all enacted legislation to in some way direct the location of new retailing in order to protect traditional centres (Bromley and Thomas 1993; Evers 2002; Schwanen, Dijst et al. 2004). The main concerns about retail dispersal surround the negative effects of increasing car dependency, the limitation on access to shops for those without a car and the threat to the vitality and viability of traditional town centres and shopping streets. Evaluations of some of these policies indicate a degree of

success in stemming the trend towards increasing car dependency in their cities (Lowe 1998; Ravenscroft 2000; Thomas and Bromley 2002; Schwanen, Dijst et al. 2004).

Retailing can only exist where it is economically viable, but in addition to providing profits for its owners and investors in a broader sense retail centres ought to provide economic opportunities for the community which they serve. This can mean both employment and the chance to start up new businesses. Here also concerns about corporately owned and managed shopping malls can be raised. The tenancies in corporate shopping malls are tightly controlled and the particular mix of retail functions are prescribed by a formula considered the lowest risk for the investor (Jones and Simmons 1993; Flannigan 1996). This can be viewed as a cultural issue, as well as one of economic opportunity, with corporate shopping malls arguably providing bland representations of a monoculture, and adding very little to the diversity or individual sense of place, and threatening the economic viability of existing traditional forms of retailing.

The continued dominance of the car based, corporate shopping mall can for these reasons be seen as an impediment to planning policies intended to move towards a more sustainable urban form (Goodman and Coote 2007). It is with this understanding in mind that this project seeks to investigate the extent to which the corporate shopping mall has proliferated in two Australian cities. In this study corporately owned means that the entire centre is owned and managed as one entity by one or a small number of individuals, corporations or firms. Identifying existing conditions is an essential first step towards developing policies for improvement.

Outline of project

This paper focuses on the form of retailing in two Australian cities: Brisbane and Melbourne. It is the first product of a detailed investigation into the form and functioning of retailing in Australian cities and the way in which it is planned for and dealt with by planning policy. The project grew from the initial observation that Melbourne (or at least the older inner and middle

ring suburbs) appears to have retained a wealth of traditional mixed use shopping centres with a diversity of individually owned and operated shops. By contrast Brisbane appears to have few of this type, depending on a number of larger corporate based shopping centres, frequently referred to as shopping malls. We set out initially to establish if this observation were true, and if so to attempt to understand why.

The first step in this project is to begin to profile the two cities, to establish the similarities and differences as far as is possible with the available data sources. This paper reports on these initial findings. It includes for each city a description of the development of the city and its retailing components, an outline of relevant planning policies during the period of proliferation of shopping malls (1957-1990) and a profile of retail in terms of floorspace looking particularly and the form of ownership at a particular point in time determined by the data available at this stage. For reasons that are explained in detail in the methodology section the most recent year for which we can definitively quantify the proportion of retail floorspace within shopping malls is 1991/92. While that is some time ago, it is well after the period of proliferation of shopping malls within existing suburbs which took place in the 1960s and 1970s, and provides us with a firm point of comparison. We can also make fairly confident estimations about how the proportion of shopping malls might have changed in the time since, as there has been little, if any, construction of traditional forms of retailing in the growth areas of Australian cities. The shopping mall is therefore likely to have increased its proportional share of total retail floorspace. The data we have assembled supports the notion of significant difference in the retail form of the two cities. The details of methodology and data sources utilised in our analysis will be given at the start of that section.

The growth of Melbourne and its retailing areas

Since its foundation in 1835, Melbourne has grown to be a metropolis of approximately 3.9 million people in June 2009 (Australian Bureau of Statistics 2009) and is spread out over a

large urban area of 2,100 square kilometres, (Department of Sustainability and Environment 2006). Suburban settlement extends at least 30 kilometres out from the GPO in most directions and beyond 50 kilometres to the southeast. Whilst the urban area extends evenly through the ring of inner and middle suburbs, the newer suburbs have been developed along particular corridors creating a pattern of tentacles of growth and semi-rural green wedges. Melbourne's oldest inner region is a Victorian city with much of its existing form established in the 1880s land boom. The latter half of the 19th century saw Melbourne grow from a town of 23,000 people in 1850 to a city of 126,000 by 1861 to more than half a million people at the turn of the century. It was the discovery of gold in central Victoria in 1851, which led to a great influx of people and money into Melbourne. In the ten years following, small allotments of land in Melbourne became more costly than those of central London (1963: 280).

The suburban form which characterises Melbourne today, began during that era when building societies were lending money freely and land was cheap and in abundance and the population showed a preference for detached single dwellings (Briggs 1963; Davison 1979). A critical factor in establishing the pattern of suburban settlement in Melbourne was the early introduction of an extensive public transport system based on a rail and tram network radiating out from the centre of the city. The first suburban train line was opened in 1857 and this was soon followed by others. The network was electrified by 1923. The low density nature of Melbourne was at least partly a result of having been built after the era of mechanised transport, so much of its growth followed the train lines radiating out from the central city (Neutze 1977; Mees 1995).

Melbourne historically has been made up of a large number of municipalities, particularly in comparison to Brisbane. The local government boundaries, which were created as the city grew, were typically the size of single suburbs. These historic segmentations existed largely unchanged until the state government carried out a wholesale amalgamation of councils in

1993. At that time the number of local municipalities in Victoria went from 210 down to 78, of which 30 are in Melbourne.

Melbourne's early retail structure followed its public transport system, (Davison 1979; Mees 1995). There were significant strip shopping centres built up around tram and train lines during the latter part of the 19th century in inner suburban areas. Some of these shopping streets, notably Smith Street, Collingwood and Chapel Street, Prahran, rivalled the CBD for retail predominance, (Mees 1993). However, the opening of the first Melbourne Myer department store in Bourke Street in 1911 led the way for many of the major retailers to relocate to the city and in the decades, which followed the CBD became pre-eminent. The CBD's dominance weakened as the metropolitan area expanded substantially in the post-war era along with car ownership and a number of shopping malls opened in suburban locations. The first American-style shopping mall was built on convent land at Chadstone in 1960. Several other such shopping centres were to follow during the 1960s including Northland, Forest Hill Chase, Southland, Doncaster, and Eastland, with a few more in the 1970s and 1980s, the most significant of which in terms of size was Highpoint, currently the second largest. By the 1990s most new shopping centres were established in the outer suburbs to service the new growth areas, (Property Council of Australia 2000).

Melbourne's first official adopted plan was the *Melbourne Metropolitan Planning Scheme* 1954, released in 1953. A major concern expressed within it was the need to decentralise the city to deal with the congestion caused by the rapid increase in car usage the city was experiencing. "The needs for shopping will be affected by the increasing difficulties arising from traffic congestion and car parking. It is reasonable to assume that as in America, these factors will tend to divert a proportion of central area shopping to suburban centres", (MMBW 1953b). The 1954 Scheme recommended the establishment of five District Business Centres, spread geographically across the metropolitan area. However the scheme also promoted a new style of centre not yet seen in Australia, the American shopping mall, which was favoured

because of its ample car parking provisions. In 1958 Myer bought a 30 acre convent site approximately 12 kms from the CBD to establish Chadstone, Melbourne's first shopping mall.

In 1964 the MMBW's chief planner E. F. Borrie, who had been in charge of the preparation of the 1954 Scheme just a decade earlier, produced a report on planning for the central area of Melbourne which noted the negative side of decentralisation, including the relative decline in retail activities in the central area (Borrie 1964). Concern about protecting the central city continued to be expressed in planning documents in the 1970s (MMBW 1971). In 1979 the Victorian Government requested that the MMBW review state planning policies regarding the location of shopping centres, following increasing concern at the impact the spread of shopping malls, and stand alone supermarkets, discount department stores and convenience stores, would have on the traditional retail structure, (Technical Advisory Committee on Retailing 1980:8). The report states that there are advantages to the community in maintaining smaller independent stores as they

provide for the individual's needs for social interaction, access by foot and public transport and ... generally enhance the convenience and quality of life in localities. The Committee recognises that the requirements of the individual consumer are not necessarily always compatible with those of the community at large (1980:35).

In 1980, with the benefit of the TAC Report, the MMBW published the *Metropolitan Strategy* which supported an activity centres policy of directing development into selected locations well served by public transport (MMBW 1980). This was elaborated on the following year, 1981, when the MMBW published *Metropolitan Strategy Implementation* giving details of the new District Centre Policy (MMBW 1981). District Centres were identified as mixed-use regional centres spread evenly throughout metropolitan Melbourne that perform secondary functions to that of the CBD providing not only retail but also commercial and other community services to their surrounding regions. The fate of this policy has been detailed

elsewhere (Goodman and Moloney 2004). Pressure to abandon the restrictions on shopping mall expansion within the District Centre policy began almost as soon as the policy was announced and fairly rapidly resulted in some major exceptions and breeches of policy being allowed. The policy suffered from a lack of consistent implementation, resourcing and whole of government support (Moodie 1991). It was watered down towards the end of the 1980s and finally abandoned by the incoming Liberal government of Jeff Kennett in 1992.

In spite of this growth in suburban shopping malls, Melbourne remains in retail and employment terms a strong centred city with considerable concentration of jobs and shops in its central area. It has also retained a rich heritage of shopping streets. However the stand alone corporate shopping mall is now the only form of retailing being constructed in growth areas on the urban fringe of Melbourne, with few modifications to the basic form (Goodman and Coote 2007).

The growth of Brisbane and its retailing areas

Brisbane was first settled by Europeans as a penal colony on its site on the Brisbane River in 1825 and was opened up to free settlement from 1838. Brisbane was not proclaimed a city until 1902 when its population was just over 120,000, about one quarter the population of Melbourne and Sydney (Spearritt 2009: 96). Brisbane remained a smaller city than its southern counterparts in part because Queensland developed a number of other coastal cities of significant size, in contrast to the other states, (with the exception of Tasmania), which were dominated by their capitals. The Melbourne statistical district currently accounts for 73% of Victoria and Brisbane 45% of Queensland (ABS 2009). Brisbane's relative lack of primacy can be partly attributed to its physical location in the bottom corner of a large state which has meant that other centres to the north were required to service regional areas (Hamnett 1984 p. 444).

The *City of Brisbane Act 1924* enabled the amalgamation of twenty municipalities to form the City of Brisbane, Australia's largest municipal government of a state capital, covering a large area of 1,367 km² (Brisbane City Council 2009). At the time of the creation of the City of Greater Brisbane 88% of its rateable properties were within a 5 mile radius of the GPO (Spearritt 2009 p. 96). The city form however was low density and dispersed with comparatively little of the classical Victorian architecture that characterized gold rush funded Melbourne. Brisbane remained relatively compact until the post war period which saw a rapid spreading out of suburban development with star shaped corridor development (Brisbane City Council 1990a).

Brisbane's urban form, like that of Melbourne, was shaped by the rail, and later road, corridors (Brisbane City Council 1990a). Brisbane was provided with its first train line in 1879 and tram line in 1885, and electrified tram line from 1897. The tram lines in particular encouraged suburban growth and continued out in many directions with the last extension being opened in 1961. A transport plan for Brisbane was commissioned from American transport consultants Wilbur Smith, just as it had been for Melbourne (Cole 1984). Both the Melbourne and Brisbane plans recommended investing heavily in a new network of freeways. The Brisbane Plan of 1965 supported the closure of most suburban railway lines and the replacement of all tram and trolley-bus networks by buses, and massive road construction (Brisbane City Council 1990a p.13).

Although the trams were eliminated between 1968 and 1969, only one new freeway and one extension were constructed, and the trains were retained and subsequently electrified.

Development of infrastructure, particularly sealed roads, water and sewerage lagged behind that of the other eastern capital cities, and the city was only fully sewered in 1970 (Cole 1984). The BCC, which previously ran the tramways, still operates part of the bus system. It has expanded the bus network and continues to invest in a designated busway system. The recent establishment of a coordinating body for public transport Translink has apparently

improved service and contributed to a rise in patronage (Mees, O'Connell et al. 2008). However, like other Australian cities, Brisbane's current urban form has been more determined by its highway system reflecting its car dependency (Spearritt 2009: 90). Peter Spearitt (2009: 95) has suggested recently that for purposes of urban analysis Brisbane should not be regarded as a distinct entity separately from the Sunshine and Gold Coasts. The combined urban area forms a 200 km city of which Brisbane is the largest part in terms of population and economy but not in area. This raises a number of complex questions for comparative city analysis and in the present paper we intend to stick with a comparison of Melbourne with the Brisbane metropolitan area alone.

The comparative growth rates for both Brisbane and Melbourne from 1901 to the last census in 2006 (Figure 1) show that Brisbane grew by 1,699,112, or 15 times, from 120,650 to 1,819,762. In the same period Melbourne grew by 3,241,435 expanding almost 7½ times from 501,580 to 3,743,015. The overall pattern of growth since 1901 is similar in both cities, both for example experiencing strong growth in the periods after the first and second World Wars (Figure 2). However, growth rates in most of the 5 year inter-censal periods since 1901 have been higher, and sometime considerably higher, in Brisbane than in Melbourne, particularly since the 1970s. Both cities have experienced a similar pattern of internal population change with rapid expansion of outer suburbs in the post war era and decline in residential population of the inner suburbs in the same time frame that was arrested and then turned around in the last two decades (Stimson and Taylor 1998).

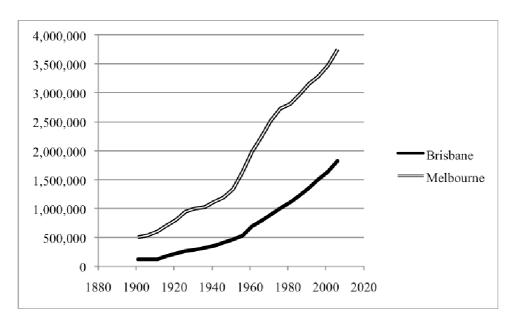


Figure 1: Population of Brisbane and Melbourne, 1901 to 2006, plotted at 5 year inter-Censal periods.

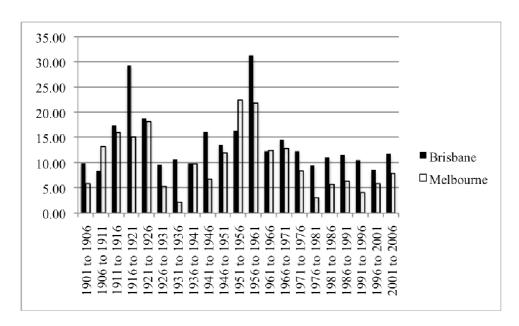


Figure 2: Percent population growth in 5 year inter-Censal periods from 1901, Brisbane and Melbourne.

Brisbane is the only state capital in Australia where the municipal rather than state government is responsible for metropolitan planning (Forster 2004). The Brisbane Council commissioned the first town plan for the city in 1934. It was completed by 1944 but not given statutory authority by the state government of Queensland which sought to restrict the Council's power (Howe 2000 p.85). Although enabling legislation was passed in 1959 Brisbane did not get a gazetted plan until December1965 (Alexander 2000 p.101). This plan

met with considerable criticism and a new plan was gazetted in 1971 which finally had state government support, largely because it facilitated state road building (England 2007 p.132).

In 1982 Ross Fitzgerald considered that Brisbane was virtually unplanned due to "the state governments 'development at any cost' attitude, coupled with the lack of professionalism and paucity of imagination manifested by the BCC" (quoted in England 2007: 132). A major plan for Brisbane was produced by Robert Stimson on behalf of the Brisbane City Council in 1990 who echoed Fitzgerald's sentiments stating that "even in recent times development has been market-led rather than Council-designated" (Brisbane City Council 1990a p.3). This plan, which "fell foul of political changes in the City Council" was eventually published as series of discussion documents in 1991 (Lennon 2000 p.161). It supported the build up of the regional shopping centres to become mixed use employments centres in order to decongest the CBD, and noted that there were current negotiation to establish tax offices (with significant numbers of employees) at Chermside and Upper Mt Gravatt (Brisbane City Council 1990a p.18)

Brisbane's early retail development, like that of other cities, was in the centre of towns and villages which later become suburbs. This was followed by a second phase of retail development at major intersections such as Woolloongabba and Stones Corner, and along public transport routes and at major stops or termini. For example Chermside and Carina developed around tram termini and Oxley and Woodridge around railway stations (DBIRD 1991). Brisbane was the site of Australia's first car based shopping mall, opened on an 11 hectare site at Chermside 10 km north of the GPO in 1957. The original Chermside of about 20,000 m² offered a two level Allan and Stark department store, a supermarket, an open arcade of smaller shops and 700 car parks (DBIRD 1991 p.6). This has subsequently expanded considerably to 68,200 m² with 256 specialty shops and close to 3,800 car parking bays (Property Council of Australia 2004). In 1965 there remained a number of established

strip centres of reasonable size such as Moorooka, Stones Corner, Mt Gravatt, Coorparoo, Nundah and Stafford (Brisbane City Council 1991b p.65).

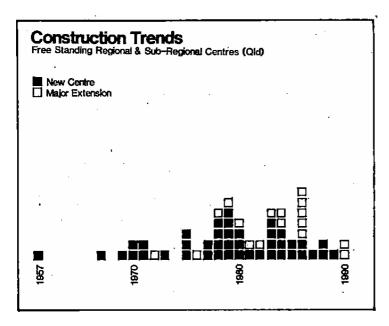


Figure 3 Construction and extension of shopping malls in Queensland 1957-1990, Source: DBIRD 1991

During the 1960s four more shopping malls at Toombul, Brookfield, Indooroopilly and Garden City got under way, and the development of free standing malls continued through the early 1970s (often based on discount department stores such as K-Mart) and through to the early 1980s. Figure 3 reproduced from a Queensland government report (DBIRD 1991) shows the expansion of shopping malls throughout the state.

The 1990 Stimson plan for Brisbane noted the problem of decline of strip shopping centres, but had no suggestion of what might be done to save them, "The decline and blight of many older established, suburban main road strip centres, the decimation of the corner stores and the social and urban development consequences are problems which are difficult for Brisbane to evaluate and solve" (Brisbane City Council 1990c p.23). In a different discussion paper the Stimson plan also commented on the tendency for shopping centres to all appear alike suggesting that "the high level of concentration of Australian retailing in a small number of chains (whose stores have become ubiquitous), contribute to this sameness" (Brisbane

City Council 1991b p.52). Even retailing in the centre of Brisbane has become dominated by the corporate shopping mall, according to Caulfield and Wanna (1995 p.40), who comment that "the CBD has been transformed by high-rise buildings of all descriptions: square, drab concrete administration blocks, tall banking and insurance towers, derivative American retail centres and more recently huge marble and mirror skyscrapers".

Comparison of shopping centre form using 1991/92 retail census and 1990 shopping centres directory

The most comprehensive source for information on retailing in Australian cities historically has been the retail census conducted by the ABS approximately every five years from 1948 to 1991/92. For this census every retail premise in the nation was required to provide information on employment, floorspace and turnover. From the 1956-7 census onwards, separate figures were provided for the CBDs, and from the 1979-80 census, for individual suburban centres. This census undoubtedly provided the most accurate picture of retail activity of any data source, as only the ABS has the ability to acquire commercially sensitive information from businesses. Regrettably however this invaluable series came to an end in the 1990s when under budgetary restrictions the ABS decided it could no longer afford to conduct the retail census.

Since its demise, the next most useful publicly available source of information on retailing in Australia has been produced by the Property Council of Australia (previously the Building Owners and Managers Association – BOMA). Commencing in 1990 the Property Council (at that time BOMA) has produced a regular directory of privately owned retail centres within each state. These directories provide greater depth of information than did the retail census as they include a fairly detailed profile of each centre including address, ownership, numbers of and types of shops, names of major tenants, floorspace and changes in form such as expansions. Unlike the ABS retail census however the directories do not include turnover

and are limited to privately owned and managed centres. They are thus an excellent source of information on shopping malls, but do not document traditional strip centres.

For this paper we have utilised the most recent retail census (ABS 1992) combined with data from the first retail directory (1991a; Building Owners and Managers Association (BOMA) 1991b) which provides us with a good picture of retail form in Brisbane and Melbourne at a particular point in time. We are fortunate that the two series of reports actually overlapped. By combining information from the two we are able to accurately determine the degree to which each city's retailing was dominated by corporately owned shopping centres rather than individually owned and managed enterprises. While the form of centres profiled by BOMA may vary, they are all managed as a single entity, and most are actually owned by a single individual or company. The exception to this is that in Melbourne there were a number (twenty four) of centres with strata titling enabling individually owned shops within a corporately managed centre, however the corporate management effectively means the centre operates as a single entity..

A preliminary and fairly basic sense of the comparative urban spatial structure of retail activity in the two cities is provided here by analysing the cities at three spatial scales:

- The CBDs, defined for the purposes of this study to be, for Brisbane, the City–Inner and the City–Remainder Statistical Local Areas (SLAs) and for Melbourne, the City-Inner SLA;
- The Inner City areas, which for Brisbane constitute the SLAs which make up the Inner Brisbane Statistical Subdivision (SSD) as defined in 2008, and for Melbourne, the Melbourne Central SSD; and
- The greater metropolitan areas of both cities, namely the Brisbane Statistical Division (SD) and the Melbourne SD.

It seems obvious to distinguish the CBDs of the two cities from their metropolitan areas as these represent the largest, and arguably the most important, retail concentrations in each city. The inner areas have been separated out for analysis as they represent the oldest suburbs where one might expect the most traditional form of retailing to be present. The Brisbane CBD is only 2.24 sq km and the inner city area, which is generally about 3km from the GPO, about 30 sq km (Stimson and Taylor 1998). Ideally, a spatial analysis of the comparative urban structure of retail activity in the two cities would be gained by comparison at spatial scales that correspond to the form of the cities at specific historic phases, such as the post war boom, or at phases of transport development. However, this would require a far more detailed study and mapping of the expansion of the urban fabrics of the two cities than is possible at this stage. The third scale of the entire metropolitan area enables an overall picture of comparison.

Table 1 shows compares the number of shopfront retailing locations, turnover and floorspace for the two cities at the three spatial scales identified above. Shopfront retailing in the 1991/92 census covers the whole range of retailing excluding motor vehicle sales and repairs. From Table 1 it can be seen that the number of locations and so on, are broadly commensurate with the relative sizes of the two cities.

TABLE 1: Comparison of shopfront retailing in Brisbane and Melbourne, 1991-02: Number of locations, turnover, and floorspace.

Spatial Scale		Number locations in 1991		(, ,		Floorspace ('000 m2)		Population 1991	
Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne
CBD (City – Inner & remainder SLAs)	CBD (City – Inner SLA)	966	1,759	692,971	1,446,986	186	440	2,581	3,592
Inner [°] Brisbane (year 2008 SSD)	Central Melbourne SSD	,	6,297	1,211,618	3,250,090	408	1,115	62,122	231,125
Brisbane SD	Melbourne SD	12,034	31,697	7,559,449	17,632,113	2,579	6,498	1,179,000	2,867,375

Sources of data: Australian Bureau of Statistics 1994a; 1994b; 1993a; 1993b.

Tables 2 and 3 show that the scale of individual retail operations in Brisbane, overall, was larger than in Melbourne: the turnover per location, the floorspace per location, and the persons employed per location are all slightly greater in Brisbane. Generally this is consistent with the idea that retailing in Melbourne has a larger number of smaller sized businesses and a greater diversity than that of Brisbane. However, the exception to this is in the CBDs of the two cities where the scale of operations is greater in Melbourne than in Brisbane, suggesting perhaps larger department stores.

TABLE 2: Comparison of scale of shopfront retailing operations in Brisbane and Melbourne, 1991-02: Turnover per location, floorspace per location, and persons employed per location.

Spatial Scale	•		Turnover Location	,	Floorspac Location	,	Persons Employed per Location		
Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne
CBD (City – Inner & remainder SLAs)	CBD (City – Inner SLA)	2,581	3,592	753,743	822619	207	250	8.72	9.19
Inner [°] Brisbane (year 2008 SSD)	Central Melbourne SSD	66,122	231,125	573,308	516,133	194	183	6.96	6.08
Brisbane SD	Melbourne SD	1,179,000	2,867,375	628,174	556,271	214	205	7.2	6.2

Sources of data: Australian Bureau of Statistics 1994a; 1994b; 1993a; 1993b

TABLE 3: Comparison of scale of shopfront retailing operations in Brisbane and Melbourne in and around CBD, 1991-02: Turnover per location, floorspace per location, and persons employed per location.

,		Number of Locations		Turnover Location		Floorspace Location		Persons Employed per Location		
Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	
City – Inner (part CBD)	Melbourne [C] - Inner	866	1,759	786,380	822,619	210	250	8.88	9.19	
City - Remainder (part CBD)	Melbourne [C] - Remainder	100	965	471,110	401,937	180	168	7.34	5.08	
Bowen Hills	Collingwood [C]	24	314	498,583	312,083	167	159	4.71	4.27	
Dutton Park	Fitzroy [C]	5	387	329,200	368,959	0	178	4.60	5.05	
Fortitude Valley Inner	Port Melbourne [C]	201	100	323,985	364,460	154	150	4.69	4.66	
Fortitude Valley Remainder	Prahran [C]	57	1,254	532,281	413,974	211	159	6.14	4.94	
Herston	Richmond [C]	10	589	199,400	435,207	100	166	3.70	4.37	
Highgate Hill	St. Kilda [C]	17	483	211,118	454,820	59	130	2.82	5.53	
Kangaroo Point	South Melbourne [C]	20	446	371,150	320,336	100	130	7.00	4.50	
Kelvin Grove		20		303,400		150		5.15		
Milton		82		479,988		159		7.00		
New Farm		67		632,224		612		5.85		
Newstead		84		330,702		214		5.06		
Paddington		109		451,110		147		5.99		
Red Hill		48		305,125		104		4.94		
South Brisbane		38		461,684		158		6.66		
Spring Hill		83		399,735		108		5.75		
West End		127		298,315		87		4.33		
Wollongabba		148		631,169		236		6.20		
Inner Brisbane (year 2008 SSD)	Melbourne Central SSD	2,106	6,297	575,308	516,133	194	183	6.96	6.08	

Sources of data: Australian Bureau of Statistics 1994a; 1994b; 1993a; 1993b Note: [C] means City Local Government as they existed in Melbourne in 1991.

Tables 2 and 3 also show the internal structure of retailing the two cities. From the city centres, the size of the retailers (on all three measures) falls away sharply from the city centre to the inner areas and then starts to rise again towards the outer areas. The likely explanation is that the outer areas are newer and have been developed in more recent times when there has been a trend towards larger scale shopping centres.

Analysis of the data using both the 1991 BOMA directories for Queensland and Victoria and the ABS retail survey of 1991/2 allow some comparisons to be made between the two cities including the proportion of retail space which is corporately owned shopping centres.

Perhaps because the 1991 Victorian shopping centres directory was the first Victorian directory published some of the profiles are incomplete with 20 of the 124 Melbourne shopping centres lacking complete data about the floorspace. Surrogate figures were estimated for these based on available information such as the number and type of tenants and comparison with similarly described shopping centres elsewhere in the city. We are confident the figures are accurate estimates that will not compromise the reliability of the study. Seventeen of these twenty centres are listed as "Neighbourhood" shopping centres, the class comprising the smallest centres. Furthermore, 14 of these shopping centres are multi-owned strata titled centres: we will discuss this again briefly and these are not counted, for the purposes of the study as, corporately owned centres.

Some of the notable facts about, and differences in, the 1991 corporate shopping centres in the two cities are:

- Brisbane had 98 shopping centres included in the directory. Of these, 97 were corporately owned and included in this study. The exception is the Inala Civic Shopping Centre which was developed in 1960 by the Queensland Housing Commission and many of the shops are individually owned.
- Melbourne had 125 corporate shopping centres included in the directory. However, 24 of these are strata titled with individually owned shops and are not counted for this study as corporately owned mall, even though their urban form may be that of a shopping centre rather than a traditional retail strip or node. With the possible exception of the Inala Civic Centre described above, Brisbane did not have strata titled centres.
- Unlike Brisbane, Melbourne had CBD shopping centres that had no major tenants
 (such as a department or discount department store), that were predominantly

- tenanted by specialty shops, that provided little or not parking, and that were in buildings that were predominantly office space.
- Unlike Brisbane, Melbourne had a number of corporately owned markets, including the large Queen Victoria immediately adjacent the CBD, which provide opportunities for small, probably mostly independently owned retailers, to operate within them.
 Brisbane had a market in the city that was closed down in the 1950s or 60s apparently for traffic congestion reasons. A new market in a suburban location at Rocklea does not operate as a corporately owned retail market.

The clear and distinguishing difference between the two cities however is the proportion of retail space that is located in corporately owned shopping centres (Table 4). Brisbane in 1991 had about twice that of Melbourne: approximately 46% compared to almost 24%. The difference is most pronounced in the respective CBDs where Brisbane had over 53% of its retail space in corporately owned shopping centre whereas Melbourne had just a little over 12%. This suggests Brisbane had experienced a much greater rate of CBD redevelopment to replace traditional older forms of retailing with corporately owned shopping centres.

In both cities, the area where corporately owned shopping centres are least dominant is in the ring comprising inner suburbs: 18.78% of retail space in Brisbane and only 5.8% in Melbourne, was in corporate shopping centres.

TABLE 4: Corporately owned shopping centres as a proportion of total shopfront retailing floorspace, Brisbane and Melbourne 1991.

	City ring area only							City area						
Spatial Scale		Corporately owned Shopping Centres (m2)		Total retail floorspace (m2)		Corporately owned shopping centre as proportion of total retail		Corporately owned Shopping centres floorspace (m2)		Total retail floorspace		Corporately owned shopping centre as of total retail		
Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	Brisbane	Melbourne	
CBD (City – Inner & remainder SLAs)	CBD (City – Inner SLA)	99,430	54,176	186,000	440,000	53.46%	12.31%	99,430	54,176	186,000	440,000	53.46	12.31%	
Inner Brisbane (year 2008 SSD)	Central Melbourne SSD	41,695	39,117	222,000	675,000	18.78%	5.80%	141,125	93,293	408,000	1,115,000	34.59	8.37%	
Brisbane SD	Melbourne SD	1,003,645	1,457,804	2,171,000	5,383,000	46.23	*27.08%	1,144,770	1,551,097	2,579,000	6,498,000	44.39	**23.87%	

Sources of data: Australian Bureau of Statistics 1994a; 1994b; Building Owners and Managers Association, 1991a; 1992b.

Notes: *and **. Melbourne had 24 freestanding strata titled shopping centres under multiple ownership, alllocated within the Melbourne SD ring and comprising an estimated 167,654m2 floorspace. Even if these are included, the values are 30.20% and 26.45% respectively.

Initial conclusions

These findings are consistent with the initial observations which prompted this research. A much greater proportion of Brisbane's retailing in 1991 was in the form of corporately owned shopping malls than was Melbourne's. This finding provide us with a sound base on which to begin to investigate possible causes, as well as a baseline of information at a particular point in time from which we can show changes over time. We can also say with some degree of certainty that the proportion of retailing in this form will have increased considerably for both cities since that time. This is simply because traditional multi-owned mixed use centres are rarely if ever constructed any more and both cities have increased their spread requiring the establishment of new centres. All new shopping centres being constructed in the new suburbs of Melbourne are now developed as a single entity and owned or managed as such (Goodman and Coote 2007) and it is safe to assume that this would be the same for Brisbane. The nature of the construction of new residential suburbs means that development is done at a scale and in a manner which does not seem to enable the creation of strip centres with individually owned businesses.

As we indicated in the introduction to this paper, we have reported here on the first stages of investigation into this issue. The next phases will extend this analysis to other major Australian cities and investigate methods of reliably ascertaining more recent changes to the retail form. We will also seek to make links between changes in planning policy and changes to the retail form over time.

It is likely that there were a number of competing factors which led to the significant levels of 'corporatisation' seen in Brisbane by 1990. Our investigations to date suggest that some explanation of the differences between the cities may be found in policy and planning decisions, or in the lack of them. As we have seen, Brisbane lacked any positive planning

measures to restrict the establishment of growth of car based shopping malls, although attempts at such policies in Melbourne were not successfully implemented for sufficient time to have any perceptible affect on Melbourne's retail form. Never-the-less they reflected a degree of caution or even apprehension on the part of government which may well have had an effect.

The structure of a single council over much of the metropolitan area in Brisbane which was traditionally intent on development facilitation may have enabled an easier path for new corporate shopping centres. This notion is supported by Peter Spearritt (2009) who suggests that other cities with "competing councils debating the appropriateness of the site and the impact on their own shopping strips" experienced more delays in the spread of the car based shopping mall (2009 p.97). The removal of tramlines would certainly have contributed to the decline in viability of traditional centres located along their routes and at their termini. A further investigation of the demise of some of the traditional strip centres which existed in Brisbane in the 1950s and 60s would no doubt provide us with a clearer explanation. We intend to continue this study and broaden it to include the other states of Australia. We would welcome the interest and input of colleagues from other cities as we hope to raise further interest in this neglected area of planning research and policy.

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