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Retail Change, and the Impact of These Changes on 'High Street'

with reference to Palmerston North.

A thesis presented in partial fulfilment of the requirements

of the degree of

Master of Arts

in

Geography

at

Massey University

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1991

ABSTRACT.

Although the retailing sector is highly significant in post-fordist advanced capitalist societies, the sector has been largely ignored in the academic and professional journals. The limited published work in this area tends, by and large, to be descriptive rather than a theoretically informed analysis. This thesis adopts a theoretical framework derived mainly from the work of Harvey, Barras, Ducatel and Blomley, in an attempt to show that the causes of the locational shifts which have occurred in the retailing sector in Palmerston North over the last fourteen years are not necessarily unique to the location. It further points to ways in which future research may better theorise the retailing industry.

ACKNOWLEDGEMENTS.

A number of people helped me to complete this thesis. I would especially like to thank my supervisor Mr. E. G. (Geoff) Thomas; the Planning Department of the Palmerston North City Council and in particular Ms. C. Crawley, Mr. G. Vossler, Mr. O. Rogers, Ms. C. Miller and Mr. M. Thomas and Ms. J. Rosier, Mrs G. Robertson-Brown, Mrs K. Puklowski (cartography), Dr. M Roche and Mr. J. Hammond of the Geography Department at Massey University and my parents who have supported me through my years at university.

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PREFACE.

The Retailing industry has changed from being a '... dull business backwater ...' (Gardner and Sheppard, 1989, 1) into being one of the most visible and dynamic sectors within post-fordist consumer societies. Its transformation has been succinctly described in the following manner;

'Once upon a time, shopping was just well shopping - a quick, simple financial transaction between shopkeeper and customer, and then home with the goods. But something has changed ... retailing has been imbued with a whole new ethos, a new significance, a new cultural meaning ...' (Gardner and Sheppard, 1989, 43).

The impacts of the high profile presently enjoyed by the retailing sector are matched by its importance (in terms of scale and the number of people employed¹) to the economies of the advanced nations. In spite (or maybe because) of the sector's visibility and accessibility to all, retailing has been largely ignored in the academic and professional journals. (Dawson, 1986). Why retailing, which is now such an important part of the urban landscape in western nations, should be ignored is difficult, if not impossible, to understand. One suggestion is that the tendency for researchers to regard production and consumption as two separate spheres (with the productive sphere being regarded as the domain of the male and the consumptive sphere, which includes shopping, being the 'non-productive' domain of the female) has relegated retailing to such a position that unlike some of the more 'masculine' areas of study, for example manufacturing, retailing has not been thought worthy of detailed analysis. (Gardner and Sheppard, 1989).

The lack of research focusing on the sector has been briefly commented on by numerous authors but few have attempted to analyse retailing using a theoretical framework. Most of the articles which have been published tend, by and large, to be descriptive and/or heavily dependent upon the use of the quantitative techniques which came into vogue with

¹ Wrigley (1988,5), for example, claims that retail corporations in Britain now have '... profit levels, employment levels, and sheer market and political power sufficient to rival the traditional giants of UK manufacturing industry'.

the advent of modern urban geography. Rather than attempting to analyse the universally recognised changes which are occurring in the retailing sector, such as the growth of retail corporates and the increasingly international nature of the industry (in the Western world) one or two general statements are made about, for example, the demise of the department store or the decline in the importance of retailing on 'High Street' (Central Business District) and then a unique situation is described in detail.

In this thesis, general theories on economic development in capitalist societies are introduced. This framework helps to explain the cyclical nature of building activity (and the subsequent pattern of over and under supply in the market) and the operation of the overall circuit of capital with particular regard to commercial capital and one of its subforms retail capital as well as the seemingly powerless position of both local and national governments in the face of rapidly internationalizing capital. A case study on (in particular) some aspects of locational change by Palmerston North's central city retailers over the last fourteen years can be used to demonstrate how these general theories can be applied to a unique situation. The thesis concludes with a discussion of the applicability of the general theories to the Palmerston North retailing sector and comments on the possible reasons for some of the discrepancies.

THEORISING URBAN PROCESSES.

Introduction.

The lack of theoretically informed analyses on retailing is not unique to the sector, but is a prevalent feature within the 'traditional' social sciences according to Friedmann and Wolff, who claim that the existing approaches fail to study contemporary urbanization adequately:

'There are individual city studies, and there are studies from within specialized perspectives of the major disciplines. But the studies do not add up: they leave one suspended in a void of meaning' (Friedmann and Wolff, 1982, 328).

The inadequate treatment of contemporary urbanization may be partially due to the problems associated with defining the terms 'urban' and 'urbanization'. Harvey (1985b, 127), for example, states that '... urbanization should be regarded as a process rather than a thing', defining urbanization as a

'... spatially grounded set of social processes ... [which] produce innumerable artifacts - a built form, produced spaces and resource systems of particular qualities organised into a distinctive spatial configuration ...' (Harvey, 1989, 6).

The neo-marxist approach provides an alternative to the traditional social science methodologies. Friedmann and Wolff (1982, 328) have identified two main streams of analysis within this approach. They are the World Systems approach advocated by, for example, Wallerstein, Amin and Frank and the neo-marxist approach to urban studies which have been influenced by the works of Henri Lefebvre, Manuel Castells and David Harvey.

All forms of geographical enquiry (according to Harvey, 1985b) have been impaired by the difficulty in confronting '... the relation between universal generalizations and the evident uniqueness of human activities and experience in particular places and times' (op cit, 6). In this thesis it is mainly the urban studies which have been influenced by Harvey which have been adopted in an attempt to demonstrate that the changes which are occurring in the Palmerston North retailing sector are not necessarily unique to the location.

The literature review in this thesis is divided into two parts. This chapter provides a theoretical framework which can be used to help analyse the changes occurring in the urban environment and in particular those occurring in the retailing sector while the next chapter discusses the main themes identified in the predominantly descriptive retailing literature.

The lack of theoretically-informed literature on the retailing sector has meant that general urban process theories have had to be used to provide a framework for this research. The cyclical nature of economic development in capitalist societies and its impact on the building sector begins the discussion. The sources and impacts of investment in the built environment and the tendency for capitalists to over-invest and over-accumulate in certain regions and/or sectors as well as in each or all of the three circuits of capital is then examined. An analysis of the distinctive position of commercial capital (and retail capital) within the wider circuit of capital follows. The increasingly internationalized intermediary economy and its effect on the influence of the political systems of the advanced nations concludes the chapter.

The Cyclical Theory of Economic development.

Economic development in capitalist societies does not appear to be a continuous process occurring at some predetermined rate but rather it seems to occur in a cyclical manner with alternating periods of economic expansion and depression. In an attempt to explain these processes some theorists, for example, Barras (1987) have adopted the Long Wave (or Kondratieff Cycle) theory. In this theory, which is not universally accepted, economic development is believed to begin with the emergence of new technologies which act as catalysts for the widespread introduction of new products, and the establishment of new industries and new markets thus creating a prolonged period of economic growth. This economic growth is not however infinitely sustainable. In time as these (new) industries mature problems of oversupply lead to a period of recession until the next 'wave' (economic upswing) begins (Barras, 1987; Harvey, 1985b).

Each prolonged period (or long wave) of economic growth is thought to create one or more long swings of activity within the building industry. Barras (1987, 5) has identified up to

three separate cycles, of different periods, which are superimposed upon each other within the building industry. These cycles can be identified as short cycles (which typically last four to five years), major supply cycles (of approximately nine years duration) and the urban development (or long swing) cycle which occurs every twenty to thirty years.

The short cycles reflect the fluctuating demand for buildings influenced by the business cycle. With all investment there is a delay before an increase in demand can be satisfied with an increase in supply. In the building sector (and in particular the private sector) this lag is most pronounced because of the relatively long period of time involved in the construction process before a demand for more floor space can be matched with an increase in the building stock. This lag can last as long as four to five years for a large office building. (Barras, 1987). Such a delay '... distorts the supply response to changes in demand and creates alternating periods of over and under supply in the market ...' (Barras, 1987, 11). As a shortage in floor space can not be alleviated quickly a self-perpetuating cycle of rent rises and increases in property values occurs which in turn encourages developers to increase the rate at which building development is completed. Eventually there is an excess supply of buildings causing rents and property values to stabilise or fall. Building development activity then declines until the surplus buildings are occupied. Development profitability therefore drives the major supply cycle as '... profitability is highest during the upturn, when there is excess demand in the market, and lowest during the downturn, when excess supply is greatest ...' (op cit, 11).

The short and major supply cycles are both superimposed onto the long swings in building activity. The occurrence of these urban development cycles '... can be related to the 'long waves' or 'growth cycles' which affect the development of the economy as a whole through the medium of technological progress' (op cit, 6).

Technological progress affects the physical scale and nature of building requirements. It

'...is a crucial determinant of the urbanisation process at each stage of economic development, such that corresponding to each new phase of technological progress there is a distinctive pattern of urban development and a shift in the type and location of building activity' (op cit, 6).

Investment in capitalist societies and in the building development sector in particular, is not only demand-driven but also investment-driven. Barras (1987, 12) claims that, in simplified terms, three main types of agents can be identified. They are the developers, the investors and the users although the influence of landowners and planners can not be ignored. Although different types of agent are involved, two inter-related submarkets occur in all sectors. They are the investment and the user submarkets. In the investment submarket, it is the investors who create the demand for new building from the developers whereas in the user submarket, the users create the demand for property which may be either owned or controlled by investors (Barras, 1987). Investors therefore '... play a crucial mediating role between the submarkets' (op cit, 12).

Institutional investors such as building societies and pension schemes have a significant impact on urban development, be it commercial or residential. Investment in the built-environment provides long term investment opportunities for these financial institutions. Their control of large amounts of investment capital can have a marked influence on the urban environment:

'By controlling the flow of investment funds and setting their own narrowly defined standards of what is 'institutionally acceptable', the financial institutions determine the when and where of investment and what can and cannot be built. 'Acceptable' places are favoured and become over-supplied, while places that are out of favour, such as the inner areas of declining cities, find it very difficult to secure funds for urban renewal'(Short, 1989a, 22).

Investment flow into the built environment is dependent '... upon the existence of surpluses of capital and labour and upon mechanisms for pooling the former and putting it to use' (Harvey, 1985b, 22). The physical landscape is a representative form of capital. Its use value is to enhance the accumulation process. The resulting built environment is '... the crowning glory of past capitalist development. But at the same time ... imprisons and inhibits the accumulation process within a set of physical constraints' (op cit, 25).

According to Wrigley (1988, 4) the retailing sector is one of the clearest examples '... of what Harvey (1985b, p25) has referred to as the "perpetual struggle in which capital builds a

physical landscape appropriate to its own condition at a particular moment in time, only to have to destroy it ... at a subsequent point ... ' (Wrigley, 1988, 4).

The capitalist mode of production is prone to problems of over-investment and over-accumulation. Over-investment and over-accumulation sometimes referred to as a crisis, can occur in each of the three circuits of capital as well as in the economy as a whole. The overall circuit of Capital can be broken down into ' ... three distinct forms: money capital, productive capital and commodity capital' (Ducatel and Blomley, 1990, 209), that is, it changes form as it moves through the various stages in the overall circuit. The (overall) circuit of capital is dependent upon a commodity having, at different stages, both a use value and an exchange value. (Ducatel and Blomley, 1990).

The (Overall) Circuit of Capital.

The (overall) Circuit of capital may be expressed as a formula,

L	L
M-C.....P.....C'-M'-C.....P....C'-M' etc.....	
mp	mp
Circuit 1	Circuit 2

where: M equals money capital; C equals commodity capital; P equals productive capital; L equals labour power and mp equals means of production (Ducatel and Blomley, 1990, 209).

The (capitalist) production process is sometimes referred to (for example, Harvey, 1985b) as the primary circuit of capital. The owner of the means of production realizes the relative surplus value from the use of a cooperative and divided workforce and/or by the use of machinery (fixed capital) once a good is sold. (Harvey, 1985b). At this time ' ... the value form of capital changes from commodity capital into money capital' (Ducatel and Blomley, 1990, 208). In an attempt to accumulate as much wealth as possible, individual capitalists tend to act in such a way (by, for example, increasing the volume of commodities they produce) that ' ... when aggregated, runs counter to their own class interest ... too much capital is produced in aggregate relative to the opportunities to employ that capital' (Harvey, 1985b, 4). According

to Harvey (1985b, 4) this tendency is demonstrated by either one or a combination of the following: overproduction of commodities, that is, a glut on the market; falling rates of profit (in pricing terms); surplus capital, either as idle productive capacity or as money capital lacking opportunities for profitable employment or as surplus labour and/or a rising rate of exploitation of labour power.

Investors who have over-accumulation problems within the primary circuit of capital can switch their investments to the secondary circuit of capital. This circuit involves the '...production and use of commodities requiring different working periods, circulation periods and the like' (Harvey, 1985b, 6). The complexity of this cycle causes Harvey (1985b, 6) to confine himself to commenting on the formation of fixed capital and the consumption fund. Although fixed capital items can be produced within the capitalist production process '... they are used as aids to the production process rather than direct material inputs' (op cit, 6). Harvey (1985b) also claims that a distinction can be made between the fixed capital which is enclosed within the production process and the fixed capital which functions as a physical framework for production. The latter he calls the ... *built environment for production* ... (op cit, 6 his italics). The consumption fund is '... formed out of commodities that function as aids rather than as direct inputs to consumption. Some items are directly enclosed within the consumption process (consumer durables such as stoves, washing machines, etc.), while others act as a physical framework for consumption (houses, sidewalks, etc.) - the latter I call the *built environment for consumption*' (op cit, 6 his italics). Some items in the built environment function for both production and consumption. Although switching capital into the secondary circuit of capital appears to be a solution to over-accumulation in the primary circuit the long term and large scale nature of investment within the built environment does create barriers for individual investors.

'A general condition for the flow of capital into the secondary circuit is, ... the existence of a functioning capital market and, perhaps, a state willing to finance and guarantee long-term, large-scale projects with respect to the creation of the built environment' (op cit, 1985b, 7).

During a crisis, 'Chronic overproduction results in the devaluation of fixed capital and consumption fund items - a process that affects the built environment as well as the consumer and producer durables' (op cit, 12). A number of different kinds of crises can be identified.

A Partial Crisis affects a particular sector, region or '... set of mediating institutions' (op cit, 12). The causes of such crises are varied and it is possible for them to be resolved within the sector, region or the institutions.

Switching crises '... involve a major reorganization and restructuring of capital flows and/or a major restructuring of mediating institutions in order to open up new channels for productive investments' (op cit, 13). There are two types of switching crises. A sectoral switching crisis involves an alteration in the allocation of capital from one sector (e.g. fixed capital) to another (e.g. education). (op cit, 13), whereas a geographical switching crisis involves the switching of capital flows from one location to another. (op cit, 13) As the built environment is immobile, a geographical switching crisis is particularly important in relation to this sphere. For production to take place in the built environment capital flows from local, or national and/or international sources as required. (op cit).

The third kind of crisis is a Global Crisis. These affect '... to a greater or lesser degree, all sectors, spheres, and regions within the capitalist production system' (op cit, 13). Only two such global crises have occurred, the first during the 1930s and the subsequent Second World War and the second which became apparent after 1973. These two global crises were

'... preceded by the massive movement of capital into long-term investment in the built environment as a kind of last-ditch hope for finding productive uses for rapidly overaccumulating capital' (op cit, 20).

The tertiary circuit of capital

'... comprises, first, investment in science and technology (the purpose of which is to harness science to production and thereby to contribute to the processes that continuously revolutionize the productive forces in society) and second, a wide range of social expenditures that relate primarily to the processes of reproduction of labor power' (op cit, 7-8).

Commercial Capital.

Commercial Capital refers to the commodities in the market which are about to be turned into money capital and to money about to be converted into commodities. The internal logic of Commercial Capital within the Circuit of Capital can be conceptualised as: $M-C-M'$.

Unsold commodities are a constant drain on profit giving rise to a

'... logical and institutional separation of productive and commercial capital. We expect, in other words, the formation of a functionally separable body of commercial capital engaged in $M-C-M'$ transactions, as opposed merely to $C-M$ conversions' (Ducatel and Blomley, 1990, 211 their italics).

This division of labour (between the producers and the merchants) allows producers to realize the value of their commodities more quickly than would be the case if they were directly involved in the selling of their commodities to the final consumers. One

'... turnover of the merchant's capital may represent not only one turnover of the many capitals in one sphere of production, but the turnovers of a number of capitals in different spheres of production' (op cit, 211).

The faster merchants can realize the value of goods the '... smaller the amount of money capital extended in order to move a given value of commodities in a given amount of time' (op cit, 211-212). Retail capital is a subform of commercial capital. The form¹ of retail capital can be defined as

'... that part of total social capital which is located between productive capital and the final consumer... the distinctive form of retail capital, within the wider circuit of capital, is the final exchange of commodities' (op cit, 213).

¹Form of Retail Capital. 'By *form*, we mean the specific expression which capital adopts as it moves from one phase of its circuit to another' (Ducatel and Blomley, 1990, 208).

Any theoretically informed analysis of retail capital should according to Ducatel and Blomley, have '... at its centre the concept of 'separation in unity'. That is, retail capital is part of a larger circuit of capital and value realization, yet also driven by unique logic' (1990, 224).

There are at least two types of consumption. The first type of consumption

'... is undertaken solely to further the accumulation of capital. In such transactions the purpose of exchange is not to consume the commodity in itself but as part of the process of production. Retail capital, however, relates to the other type that being consumption necessary to the maintenance of the private sphere of reproduction' (op cit, 213).

Ducatel and Blomley (1990) assume that the

'... logic of retail capital is the same as that of commercial capital. In other words, "the purpose of commerce is not consumption, directly, but the gaining of money, of exchange value... In his [sic] exchange, the merchant is guided merely by the difference between the purchase and sale of commodities" (Marx 1973: 149). Clearly, some actions of retail capital may create value (for example, the transportation of goods). However, we would argue that the dominant logic of retail capital is that of exchange' (op cit, 213).

The relationship between productive and commercial capital involves the exchange of commodities imbued with surplus value. The merchant purchases such commodities realizing their value at the point of sale. Neither productive nor commercial capital are interested in the use value of the commodities. Instead they are both solely concerned with a commodity's exchange value indicating a conflict of interests between merchants and consumers. (By contrast consumers are concerned about the use value of commodities). In an attempt to accumulate as much profit as possible both the industrial and the commercial capitalist attempt to retain the largest share of a commodity's surplus value. 'The profit for the commercial capitalist is expressed in the difference between M and M' '. For the industrial capitalist, the profit is expressed as the difference between C and C' (op cit, 214, their italics).

If retail capital is part of the larger circuit of social capital it is expected that at least some of the contradictions expressed within the larger circuit will also affect retail capital. For example, the holding down of wages (which is at first beneficial to industrial capitalists but in the longer

term is detrimental because of the link between production and consumption) adversely affects the ability of merchants to realize a commodity's surplus value if, as a result, consumers have less money capital. (op cit). The inability of merchants to realize the surplus value of commodities (or a realization crisis) is the result of a number of factors. One such factor is the behaviour of consumers which is extremely difficult to predict as shopping is not only a necessity but is also a 'social act'. (op cit).

Traditionally retailing has been the domain of the *petit bourgeoisie*. The sector has now, however, become more concentrated. The market share enjoyed by the larger retail capitalists allows them to exert considerable pressure on industrial capitalists and thus to appropriate a higher proportion of the commodities' surplus value. (op cit). Retailers have also attempted to increase their profit levels by reducing their overhead costs. This can be (and has been) achieved by, for example, re-locating to cheaper out-of-town locations, by the de-skilling of employment in the industry (often associated with feminization of the workforce) and by an increase in the number of part-time and juvenile workers. Many shops have also adopted a self-service format which forces consumers to perform tasks formerly carried out by shop assistants thereby increasing store 'efficiency'. (op cit).

International Commercial Capital

The function of international commercial capital or as it is sometimes called, the intermediary economy, is to '... organize and adjudicate all manner of international exchanges - for a fee' (Thrift, 1987, 203). There are four main types of international commercial capital. They are real estate, securities, the selling of corporate services, for example non-life insurance, and commodity exchange mediation. (op cit). Nearly every type of Commercial Capital has begun to internationalize because of three inter-related factors. They are: the internationalization of some of their major customers; the internationalization of markets and as a result of technological progress. (op cit, 208). An important element of the international commodity market is the (international) property market. The international property market

mainly involves office buildings '... although selected retail and industrial buildings and some expensive residential buildings can also be included' (op cit, 209-210).

The Political System.

The development of telecommunications and associated technological advances make, according to Harvey, a nonsense of '... some concept of the city as a tightly-walled physical unit or even a coherently organised administrative domain'(1989, 6). The evolution and widespread introduction of such technology has been termed the 'service revolution'. The first phase of the service revolution was based upon the introduction of computers and associated devices into a wide range of services such as financial institutions, distribution networks and public administration. The introduction of local computer networks within large businesses can be thought of as a precursor to the second phase of this 'revolution'. (Barras, 1987).

The political system both local and national, appears to be almost powerless in the face of rapidly internationalizing capital.

'Since the second world war, the processes by which capitalist institutions have freed themselves from national constraints and have proceeded to organize global production and markets for their own intrinsic purposes have greatly accelerated' (Friedmann and Wolff, 1982, 310).

Investors involved in the international property market, for example, may face planning restrictions if their proposed development does not comply with planning guidelines. This is increasingly unlikely, however, due to the changes which have occurred in urban governance in the last two decades and from that the new attitudes to planning which have evolved.

Urban 'governance'

'... means so much more than urban "government" ... the real power to reorganise urban life so often lies elsewhere or at least within a broader coalition of forces within which urban government and administration have only a facilitative and coordinating role to play' (Harvey, 1989, 6).

During the last two decades there has been a reorientation in attitudes to urban governance in the advanced capitalist countries. In simplified terms the managerial approach, which was predominant during the 1960s, has to a large extent been replaced by more entrepreneurial forms of government. (Harvey, 1989, 4). This entrepreneurial approach is clearly demonstrated by retail planning becoming '... more *laissez-faire* ...' (Howard, 1989, 8) in comparison to earlier¹ planning approaches which attempted to '... contain pressures for decentralization and to maintain the traditional hierarchy of shopping centres' (Howard, 1989, 8)². This shift in the urban governance approach appears to have evolved as a result of the 1973 recession. As Harvey has observed

'Deindustrialization, widespread and seemingly 'structural' unemployment, fiscal austerity at both the national and local levels, ... provide a backdrop to understanding why so many urban governments, often of quite different political persuasions and armed with very different legal and political powers, have all taken a broadly similar direction. The greater emphasis on local action to combat these ills also seems to have something to do with the declining powers of the nation state to control multinational money flows, so that investment increasingly takes the form of a negotiation between international finance capital and local powers ...' (Harvey, 1989, 5).

Although international capital

'... desires maximum freedom from state intervention in the movements of finance capital, information and commodities, it is vitally interested in having the state assume as large a part as possible the costs of production, including the reproduction of the labour force and the maintenance of 'law and order' (Friedmann and Wolff, 1982, 310).

¹ Note: Howard claims that planning legislation during the 1970s attempted to '... contain pressures for decentralization and to maintain the traditional hierarchy of shopping centres' (1989, 8) and did not become more *laissez-faire* until the 1980s. This contrasts with Harvey's (1989) view that urban governance became more entrepreneurial during the 1970s and 1980s.

² According to Harvey (1985b, 165), however, professional planners are confined '... for the most part, to the task of defining and attempting to achieve a 'successful' [for investors] ordering of the built environment'.

Conclusion.

This theoretical discussion has attempted to demonstrate that the retailing sector is part of the wider circuit of social capital. As such, the changes occurring in the retailing sector should not be studied in isolation - the next chapter shows the fragility of this approach, but rather should be analysed in association with the changes occurring in the economy as a whole. The relationship between this theoretical framework, the general trends recognised in the literature and the findings of the Palmerston North locational study will be examined in the conclusion to this thesis.

THE RETAILING INDUSTRY.

Introduction.

Retailing has been defined by Dawson (1986, 3) as the distribution and sale of goods and services to final consumers. It involves the '... interaction of three parties: suppliers (ie manufacturers and wholesalers), retailers and shoppers' (National Economic Development Office, Distributive Trades EDC, 1971).

The rapid changes which have occurred, and are occurring, in retailing in the western world are due to changes which are taking place in these societies as a whole - 'Retailing changes as a society changes, ...' (Hughes, 1987, 24). In the late twentieth century, retailing, according to Dawson et al (1988, 2) is having to change considerably.

The available literature on retailing is mainly descriptive. Many authors dedicate most of their papers to a case study on a particular city or urban location. Little or no attempt is made to link the changes which are occurring in these areas to those occurring in other towns or cities or to the economy as a whole. A number of common themes have, however, emerged from the literature. They are: a concern about and the causes of, downtown decline; the role of the state; the increasingly international nature of the retailing sector and the concentration of the capital within the industry; the use and development of empirical models to study retail change and shopping centre design and the growth of shopping as a leisure activity.

Downtown Decline.

The movement of central city retailers to out-of-town locations has contributed to downtown decline. The term, out-of-town, which Howard and Davies (1988, 40) use to describe '... shopping centres in non-traditional locations: not part of or adjacent to traditional centres, and not part of the development of new residential areas' is misleading according to Schiller (1988, 185), who claims that the term 'Off centre would be ... more accurate'. This

phenomenon, which is not apparent in Palmerston North (although there is considerable movement by retailers on 'High Street'), has occurred most profoundly in the United States of America (although for the time being at least '... the long continued process of outward decentralisation of America's urban areas is over' (Hall and Breheny, 1987, 247)) and in the United Kingdom during the last two decades. (Hall and Breheny, 1987, 244). A change in demand caused by the movement of large numbers of people out of central city areas to the suburbs, followed (in the United States) by employment deconcentration has increasingly led (from the late 1950s onwards) to the development of regional shopping centres and in a number of cities, the movement of retailing out of urban areas all together. (Hall and Breheny, 1987; Urry, 1986; Howard, 1989). Improvements in transportation (for example, increases in private car ownership) and (associated) congestion problems in the central areas of a number of cities has '... undermined the accessibility advantages traditionally held by the CBD ...' (Urry, 1986, 204; Kaye, 1985). The benefits (for retail institutions) of larger operating units, for example, superstores, hypermarkets and retail warehouses in out-of-town/off-centre locations have only become possible, however, with increased personal mobility. (Urry, 1986).

The growth of out-of-town shopping centres and malls has not only taken place because of changing demand but also at the expense of established shopping centres. 'The causal link is, however, more difficult to measure than is commonly assumed ...' (Urry, 1986, 209). Where retailing is buoyant it can be difficult to evaluate the volume of trade diverted to a new shopping centre as the '... diversion in such a case can be largely theoretical - what might have been - rather than actual' (Howard, 1989, 49). March (1982, 4) expresses a contrary view claiming that

'Any new development poses a threat to existing business activity, irrespective of size or condition. There is a limit to available shopper expenditure, ... The business activities which are most vulnerable are those that are locationally disadvantaged by changes in the structure of the market over time, by an ill-equipped centre in terms of meeting today's requirements, and by internal management inefficiencies ... On the other hand, there are those who are found in newer centres which have not succeeded'.

Three waves of retail decentralization have been identified. The first wave involved supermarkets, the second retail warehouses and the third involves clothing and quality comparison goods. (Dawson et al, 1988). Although a number of retailing outlets are moving to the suburbs for commercial reasons - 'The economics of furniture, carpet, do-it-yourself and major electrical appliance retailing compel traders to compete with those who have already moved, and to move from town centres to find warehouse-type premises with ample parking' (Kaye, 1985, 222), some sectors of the retailing industry, for example warehousing, which are locating on these off-centre sites were never previously part of the central city (or older shopping centres): 'They have not 'moved out' of centres: they were never there' (Howard and Davies, 1988, 36).

The demise of the department store is also supposed to have detrimentally affected retailing in central city areas. The

'... customer-attracting ability of variety and department stores is *fundamental* to the commercial well-being of the entire city centre According to some pundits, specialist and leisure shopping will be the order of the day in the urban core, and all forms of large-scale convenience and comparison retailing will take place in suburban or out-of-centre settings' (Brown, 1987b, 15-16; Mackeith, 1985; March, 1982).

The decline of central city retailing has not been universal however. Out-of-town superstore/hypermarkets, for example, have emerged largely at the expense of the intermediate-sized supermarkets rather than the small convenience store ('corner dairy')¹. Restructuring in the retail industry has therefore tended to polarise activity into the two ends of the spectrum (Wrigley, 1988, 23; Gibson and Hurdle, 1985).

¹ These modern convenience stores are a '... cross between the small, traditional corner store and the familiar large supermarket' (Mercer and Maher, 1986, 32). With the growth of these stores a new corporate power has arisen- chains of such stores are appearing, for example, petrol forecourts. (Mercer and Maher, 1986; Jones, 1985b).

Response (to Downtown Decline).

In response to the 'problem' of retailer movement out of central city areas, a number of 'solutions' have been put forward in the literature. These vary from resignation to the fact that the town centre is an out-of-date concept - the '... easiest though not perhaps ideal, alternative would be to simply recognise the town centre at an archaeological level or as an open museum ...' (Brand, 1987, 26), to encouraging an inclusive approach to revitalization, for example, the 'Main Street' strategy. The notion of town centres is almost a thousand years old and although they are thought to give an area '... identity, character, [and] a sense of place ...' (op cit, 23), it does not necessarily mean that these qualities will (and can) be maintained ad infinitum. The retail hierarchy is not '... immutable, rather it is a product of its time. New forms of retailing *will* appear, changes in the spatial structure of retailing *will* take place - and crucially - these changes *will* stimulate a competitive response from retailers in existing locations' (Brown, 1987a, 29, his italics).

The 'Main Street' strategy has been adopted by a number of Canadian cities in an attempt to alleviate downtown decline. Those people immediately affected by the decline decide on the counter measures which can/should be taken. This strategy can be contrasted with programmes which operated during the 1970s (in Canada). Most of these focused on the physical appearance of central city areas by, for example, the introduction of street furniture and light fixtures. In other words they involved '... quick-fix solutions that treated the symptom - the physical decay - rather than the disease: downtown's economic, cultural, environmental, and social disintegration' (Dalbrad, 1990, 35)¹.

Other suggested ways of countering retailer exodus from 'High Street' include improving public transport services to central city areas and taking advantage of shopping as a leisure activity. Brand suggests

¹ Weisbrod and Pollakowski (1984) also criticize improvement projects which use design improvements as the sole means of attracting shoppers back to the central city area.

'...using the town centre in terms of modern spatial consumerism by playing at twentieth century villagers and using the full set of signic town centres values with all the gusto of Monopoly. This involves encouraging every sort of bijou restaurant and curiosity shop from old Penguin paperbacks to high-fibre, low-fat, uni-sex Tibetan tea-cosies. However, it does require real money and real pretentiousness ... and could be made redundant by any new fad ...' (1987, 26).

Other commentators however, do not believe that out-of-town shopping should be restricted in any way either because it provides competition which helps to '... give customers a greater choice of goods, a wider range of shopping facilities, and better value for money ...' (Anon, 1987, 2), or because out-of-centre and town centre retailing are compatible provided that there is recognition of their different functions. The purpose of High Street is not solely retailing according to Wallis (1987), who claims that it also includes specialist comparison retailing, servicing and leisure orientated operations.

The State.

The state can also influence the locational decisions made by retailers. In New Zealand planning legislation usually through the use of zoning, has been used to place restrictions on the position of commercial activities within an urban area.

Prior to the early 1980s both central and local government in Britain promoted the '... potential efficiency of the traditional hierarchy of shopping centres for urban areas' (Thomas, 1989, 203), by (in particular) a commitment to the maintenance of central city areas for commercial use. (Thomas, 1989). The same is also true of Scotland where, until 1986, development was restricted to existing centres. The change in policy was on the grounds that such a restriction could prevent towns and cities benefitting from new investment and that consumers would be denied the '... choice and convenience which new forms of shopping provide' (Jones, 1989a, 17).

The role of the state in regulating retailer activity is cause for debate. Competition between two out-of-town rival shopping schemes may, for example, result in store failure. Although this outcome would be a waste of resources Johnston (1987, 7) questions whether planning should consider the trading potential of stores claiming that such a consideration is a

commercial rather than a planning matter. Local government therefore should not be held responsible for business failure. (March, 1982). Wade (1985, 216) also disagrees with restricting development in certain areas claiming that 'It is like Canute trying to hold back the tide ... the only approach that is going to work in the long-term, is to do something positive, so that retailers do not want to desert the town centres'. According to March (1982, 47) (planning) regulations should '... seek to harness private sector initiative and resources, rather than to direct and coerce it ...'.

Concentration of Capital.

Since 1945 there has been a clear trend towards larger-scale economies using ever larger units of operation (Urry, 1986). For example, in Britain the number of retail outlets fell by over 40 per cent between 1950 and 1984 with most of the fall occurring in the late 1960s. The decline in the number of outlets occurred while there was an increase in the real volume of retail sales (from 40.6 billion pounds in 1950 to 57.6 billion pounds in 1982). (Wrigley, 1988). There has also been a growth in the major multiples market share, particularly in the grocery sector. (Davies and Sparks, 1986; Howard and Davies, 1988). This dominance of the multiple retailer¹ '... has given the British high street or town centre a mundane, carbon-copy like appearance: know the level of the retail hierarchy and you can fairly safely predict what you are going to find, not by merely by function but by actual retailer!' (Gayler, 1989, 278; Howard and Davies, 1988).

The growth of retail corporations has led to a '... fundamental shift in the balance of power between retailers and their suppliers ... *towards* the rapidly expanding retail corporations and *away from* the manufacturers' (Wrigley, 1988, 5-6 (his italics); Gardner and Sheppard, 1989). This power shift is demonstrated by, for example, the demise of manufacturer-owned delivery fleets which have been replaced by contract distribution services and the adoption by major

¹ Small individually owned shops were the predominant form of retailing. According to Mercer and Maher (1986, 30) 'The transition from a retail pattern consisting of a large number of small, individually owned shops to one dominated by a few very large and frequently international chains, is clearly one of the most dramatic changes that has taken place in the urban fabric this century'.

retailers of many of the functions formerly performed by wholesalers, that is, storage, packaging, delivery and some processing of products at centralized locations. The market share of these large retail corporations also allows them to deal directly with the producers. The major multiple grocery groups in Britain, for example, now move eighty to ninety per cent of their stock through regional distribution centres. (McKinnon, 1986b; Howe, 1990). As well as extending their control 'vertically' over a product range along the logistic channel ('... the channel through which a particular product is physically distributed from point of production to retail outlet' (McKinnon, 1986b, 51)) retail corporations can also extend it 'horizontally' across the product range. Retailers have more direct influence on manufacturers through the growth of own label products - the cost of which is usually borne by the manufacturers (Davies et al, 1986) and an '... increased role in product innovation *vis-a-vis* processors of food products' (Howe, 1990, 23).

Internationalisation.

Traditionally retailing has been part of the domestic economy of nation states. During the 1990s however, continuing internationalisation will according to Treadgold (1990, 4) be '... one of the most important forces of change shaping retailing'. Internationalisation of this industry is demonstrated by, for example, international (in 'advanced' economy countries) similarities in shop and shopping mall design, format, type (for example, limited line convenience stores) and in some cases, for example, McDonalds outlets operating in a number of countries under the same name. (Treadgold, 1986). Most of the internationalising retailers have their origins in highly developed retail markets. In simplified terms a retailer who is unable to sustain corporate growth has two choices which are not mutually exclusive,

'On the one hand, he/she may seek diversification in the home market ... A second route is to develop the core (and, in some instances, non-core) retail business outside of the home market and there can be no doubt that, in a range of guises, this is emerging as a preferred growth strategy' (Treadgold, 1990, 5).

Both market push (declining growth prospects in the domestic market) and market pull factors (such as the size and growth prospects of foreign markets) have been identified as incentives for retailers to internationalise their operations. (Hall and Crosbie, 1990). Internationalisation was made easier during the 1980s by a number of factors, for example, '... enhanced data communication technologies, new forms of international financing and the progressive lowering of barriers to international development' (Treadgold, 1990, 5). An evolution of strategies has accompanied this increase in the internationalisation of retailing. The first strategy involved retailers securing a financial stake in the industry abroad. In more recent times retailers have sought to internationalise their operations by either using the multinational strategy which involves the '... implantation of autonomous affiliates operating comparably to the parent company, but adapted to the local market ...' (Salmon and Tordjman, 1989, 4), or by the global strategy which '... corresponds to a reproduction outside their national frontiers of a formula which is known to be successful in the country of origin' (Salmon and Tordjman, 1989, 4). Franchising, which only '... appeared in significant numbers on the high street ... in the 1980s' (Howard and Davies, 1988, 39; Mercer and Maher, 1986) is the preferred means of internationalising by speciality retailers (due to the relatively low cost, and the opportunity it provides to employ local management). It is very visible but is not necessarily the most important internationalising strategy adopted by retailers. Other strategies include takeovers, mergers and cross-border retail alliances in which retailers extend influence but not necessarily their trading presence. As would be expected in their first moves towards internationalisation retailers are likely to move into near-by countries which have '... fundamental similarities to their home market' (Treadgold, 1990, 10). An example of this 'border-hopping' technique is the recent expansion into New Zealand (via the acquisition of Progressive Enterprises) of the Australian company Coles-Myer. This move is '... widely interpreted as a precursor to a substantial acquisition in either Western Europe or North America' (Treadgold, 1990, 10).

Between 1984 and 1989 British companies made a total of '... 37 acquisitions in US retailing valued at approximately \$3.9 billion. This represents 3 and 4 per cent respectively of the total number and value of all British acquisitions in the US over the same period' (Hamill

and Crosbie, 1990, 15). Compared to European retailers, retailers in the United States have internationalised their operations more slowly (with one or two notable exceptions, for example, McDonalds and Kentucky Fried Chicken) and have in recent years actually sold some off their overseas assets. 'By 1989, just ten of the 50 largest US retailers had a trading presence outside the USA, confined for the most part to adjacent Canadian and central American markets' (Treadgold, 1990, 6). Japanese retailers have also internationalised their operations by moving into Hong Kong, Thailand, Singapore and other Pacific rim countries. Two Japanese department store chains are also opening stores in Australia - a move that is thought to represent a 'learning exercise' before they and other Japanese retailers move into the United States and Western Europe. (Treadgold, 1990, 10).

Empirical Retail Studies.

A number of models and 'theories' have been devised in an attempt to 'explain' retail change and why some outlets fail while others succeed. According to Laulajainen the '... natural theoretical starting point for a spatial retail study is the central-place theory' (1988, 293). The decline in transport costs in comparison to the purchase price of goods has meant that the theory has lost as Laulajainen (1988, 293) claims, '... a good deal of its inherent explanatory power'. The assumption that consumers will patronize the nearest shopping centre is also thought to be inaccurate. (Lord, 1986).

Since the 1930s a number of attempts at constructing a theory of retail change been made. These 'theories' broadly fit into three main categories - environmental, cyclical and conflictual. (Brown, 1987a). Although they were developed with retail institutions in mind, they can, according to Brown (1987a, 28) '... also be interpreted spatially and applied to geographical concentrations of retail activity-planned shopping centres and unplanned shopping districts'.

Environmental theories assume that changes in economic, demographic, social, cultural, legal and technological conditions of the marketplace are reflected in the structure of retailing. The growth of the Department store in the nineteenth century, for example, is thought to

represent the '... retailing system's response to the growth of middle class demand, [as well as being due to] the development of efficient intro-urban transportation facilities and customer willingness to accept fixed prices' (Brown, 1987a, 27; Brown, 1988). Retail innovations are thought to occur when '... environmental conditions are favourable ...' (Brown, 1987a, 27) and only those retail institutions that can adapt to changes in their market niche are thought likely to survive over time. (Brown, 1987).

Cyclical theories assert that change occurs in an '... oscillatory manner by the repetition of earlier trends' (Brown, 1987a, 27; Brown, 1988). The most important cyclical theories (according to Brown, 1987a) are the retail 'accordion', the 'wheel' of retailing and the retail 'life cycle'. (Brown, 1987a). The retail accordion or general-specific-general cycle measures developments in the retailing industry by examining the number of product lines offered by the dominant retail form. 'A rhythmic pattern of development dominated in term by establishments selling a wide range of wares and shops specializing in a narrow range of goods is clearly discernible ...' (Brown, 1988, 20; Brown, 1987a). The theory was extended by Hollander (Brown, 1988), who claimed that as well as there being evidence (which does not imply proof) that suggested the occurrence of the general- specific- general cycle within the industry as a whole, individual retail outlets also tended to '... widen and narrow their inventories with the passage of time' (Brown, 1988, 20).

The wheel of retailing model contends that '... retail institutions commence as cut-price, low cost, 'no frills' operations which subsequently 'trade up' through the provision of credit, delivery and a wide range of customer services' (Brown, 1987a, 28; Brown, 1988). The wheel is always thought to be revolving although the speed of its revolutions vary. (Brown, 1988). A large number of retailing institutions in the 'developed world' '... do appear to have evolved in the manner described by the wheel' (Brown, 1990, 144). The theory has not been without its critics who claim that, the process is not inevitable and that it lacks universality. There is little evidence of the 'wheel' in third world countries, for example, and not all stores began by selling discounted goods - 'Boutiques, convenience stores, planned shopping centres ... all entered the market on a high-cost basis. (Brown, 1988, 18-19). The 'wheel' of retailing also

only refers to one aspect of retail change, that is, the '... price-quality continuum, ...' (Brown, 1990, 146).

The retail life cycle '... maintains that institutions evolve through the anthropomorphic stages of birth, growth, maturity and decline' (Brown, 1987a, 28). Once a new form of retailing has gained public acceptability it grows rapidly. Imitators adopt the same format and the technique enters the accelerated growth phase. This success is accompanied by escalating costs - '... a corollary of overzealous expansion ...' (op cit, 28) at the end of this period. The maturity stage is therefore '... characterised by a dissipation of the institution's earlier vitality and the competitive assaults of new retail forms. Finally, the institution, starts to decline [eventually leading to] withdrawal from the competitive arena' (op cit, 28).

The two most important conceptions of conflictual theory are the dialectical and crisis-response models of retail change. (Brown, 1987a). The dialectical models claim that the '... existing institution or 'thesis' is challenged by its 'antithesis' (a new and contrasting retail technique) and a synthesis eventually emerges from the melding of the two' (Brown, 1987a, 28) whereas the crisis-response model '... identifies four stages in the reaction of a new form of retailing: shock, defensive retreat, acknowledgement and adaptation' (Brown, 1987a, 28).

A number of attempts have been made to develop an integrated model. The theory of spiral movement, for example, '... contends that retail innovations which trade up or develop in any way as a result of inter-institutional competition, thereby create an opportunity for a new retail technique offering the attractions of the original ... on a slightly higher plane' (Brown, 1987a, 29). According to Brown (1987a, 29) the most important '... practical implication of the theories is the question mark they raise over impact assessment procedures'. This approach assumes that '... every pound spent in the new centre is automatically a pound lost to the neighbouring shopping districts ... there is an element of super-store's trade which may be regarded as creating money out of thin air' (Brown, 1987a, 30).

The theory of cumulative attraction and the rule of retail compatibility have been used to study retail agglomeration. The theory of cumulative attraction relies on the commonly held belief that the '... consumers compare goods in a number of shops before purchase, particularly when price, pattern, quality and fashion are important considerations' (Brown,

1987b, 4). Following on from the theory of retail of cumulative attraction is the rule of retail compatibility which states that '... compatible establishments in close proximity will enjoy an increase in business volume directly proportional to the amount of customer interchange between them and inversely proportion to the relative size of the outlets concerned' (Brown, 1987b, 4). According to Bromley and Thomas (1989, 42), however, studies appear to indicate that

'Retailers of quality comparison goods are characterised as benefitting from the comparison shopping facilitated by spatial proximity; while convenience goods traders are dispersed towards their customers and repelled from each other by the disadvantages of close competition for standardised products'

The evolution of retail one-stop shopping and other factors such as planning regulations (which in the past at least have promoted retail agglomeration) may also reduce the applicability of the two 'theories', according to Brown (1987b).

Other ways in which retailing has/can be studied include observation studies, which examine '... retailers' perceptions of their interdependency with adjoining establishments' (Brown, 1987b, 5), innovation research (Laulajainen, 1988) and individuals' cognitions of distance - 'It is necessary to understand the roles that individuals' cognitions of distance play in influencing spatial choice, as well as the possible effects of such cognitions upon the commercial viability of various retail locations' (Coshall, 1985b, 107).

Shopping as a Leisure Activity (Funshopping)¹

During the 1980s the ethos of (non-food) shopping is thought to have changed considerably. (Gardner and Sheppard, 1989, 43; Lavery, 1987). Wade (1985, 215), for example, has likened leisure shopping to a day in the countryside claiming that non-food shoppers are not captive to one particular centre and that they will '... increasingly be looking at shopping in the round, the total 'offer' as opposed to a particular shop'. To this end some shopping centres

¹ According to Jansen (1989, 182) '... one tends to dismiss 'funshopping' as relevant terminology in geographical research. It is an abstract kind of terminology which hides realities rather than coming to grips with them'.

provide a number of non-retailing shopping activities as well as a theme (and many leisure oriented centres now contain similar retailers to speciality retail centres). (Howard and Davies, 1988).

Conclusion.

The literature reviewed identifies some of the major trends occurring within the retailing sector between the mid 1980s and the early 1990s. Although it describes the changes which can be observed, particularly in the United Kingdom, it does not provide theoretically informed explanations as to the possible causes of these changes. The use of empirical studies, with their reliance on inductive knowledge and their tendency to examine the retailing sector in isolation are also unable to provide such explanations. The limitations of using the empirical approach in an attempt to 'explain' the changes occurring in the retailing sector are briefly discussed in the conclusion to this thesis.

PALMERSTON NORTH CASE STUDY.

Introduction

Through our regular shopping trips many of us have an intuitive understanding of the changes occurring in the retailing sector and the impact of these changes on our local 'High Street' or shopping centre. In this locational study the use of quantitative data was restricted by either non-compilation of the necessary information or prohibitive data costs. A combination of empirical information and local (informal) knowledge of the Palmerston North retailing sector was therefore used.

Palmerston North.

The city of Palmerston North is located on the west coast in the lower half of the North Island of New Zealand. It is approximately 145 kilometres north of Wellington and 528 kilometres south of Auckland. (fig 1). Palmerston North has a population, of approximately 70 000 (1991 Census Provisional Results). As well as servicing the needs of its population the city is also an important regional centre. It is the largest city in the Manawatu-Wanganui region (fig 1) and has over one quarter of New Zealand's total population living within two hours drive. (Palmerston North City Council, 1991). The importance of Palmerston North as a regional shopping centre has been demonstrated by a survey conducted by the Planning Department of the City Council in 1989 in which it was found that one in three people surveyed were from out-of-town. The main reason given for coming into the city was to shop, especially for grocery items. (Manawatu Evening Standard, 10 April, 1991).



Fig 1 Location of Palmerston North.

The Palmerston North Retailing Sector.

Before the Second World War, commercial development in Palmerston North was essentially limited to the Central Business District and to a small centre at Terrace End with a number of individual shops spread throughout the city. Since that time six new local shopping centres¹ have been developed.(Palmerston North City Council, 1982, 141).(fig 2). The primary shopping area for the city however is still located within the Central Business District. The Central Area is given as that area of land contained within the boundaries of Grey/Walding, Pitt, Ferguson and Princess Streets in Review Number 3 of the Palmerston North District Scheme.

The main shopping areas within the central area have their shop frontages designated (fig 3).

¹ It is difficult to know the criteria that was used to categorise these shopping centres. According to Caroline Miller (Senior Planner Resource Management for the Palmerston North City Council) the number of such centres has not increased since 1982.

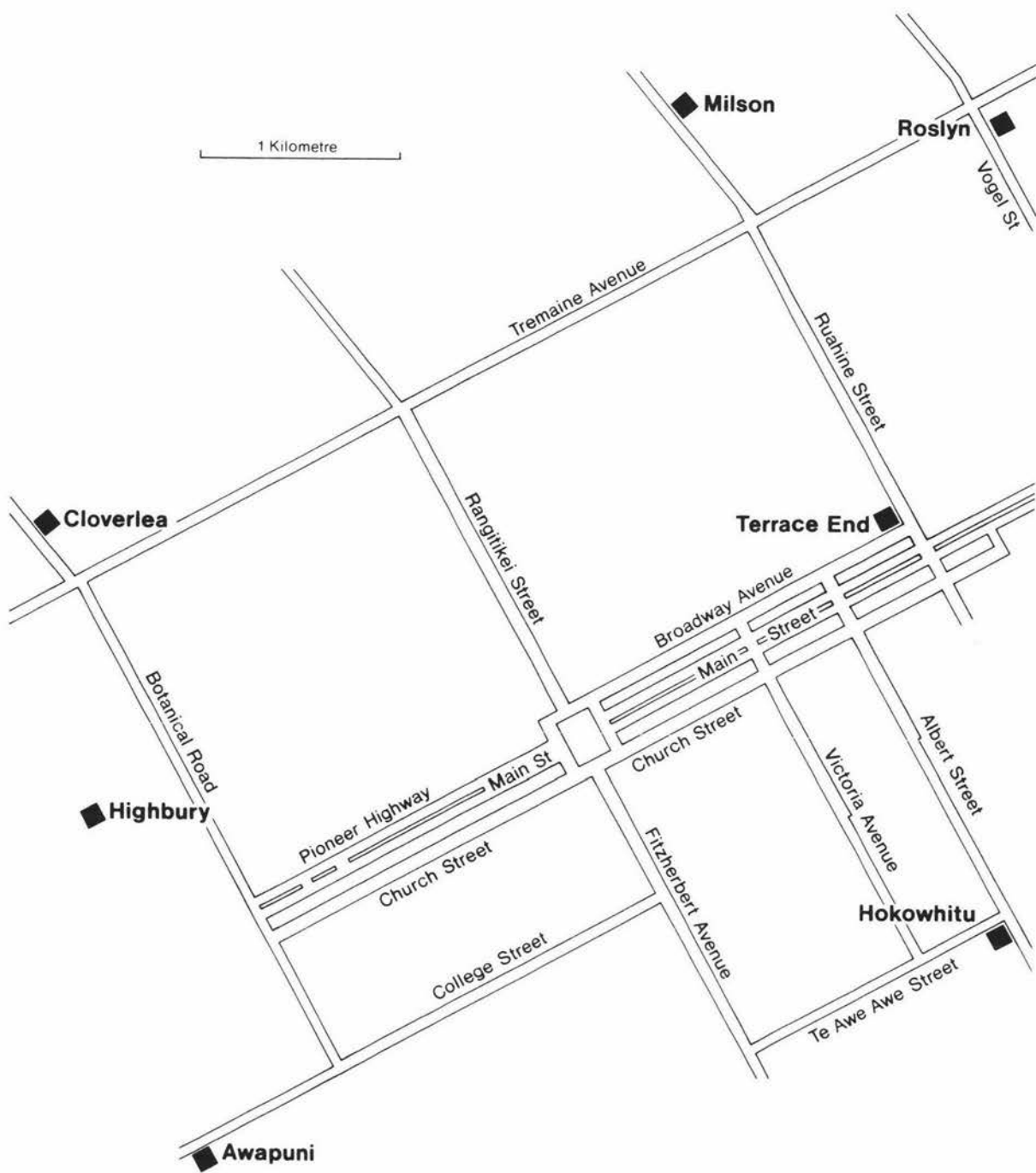
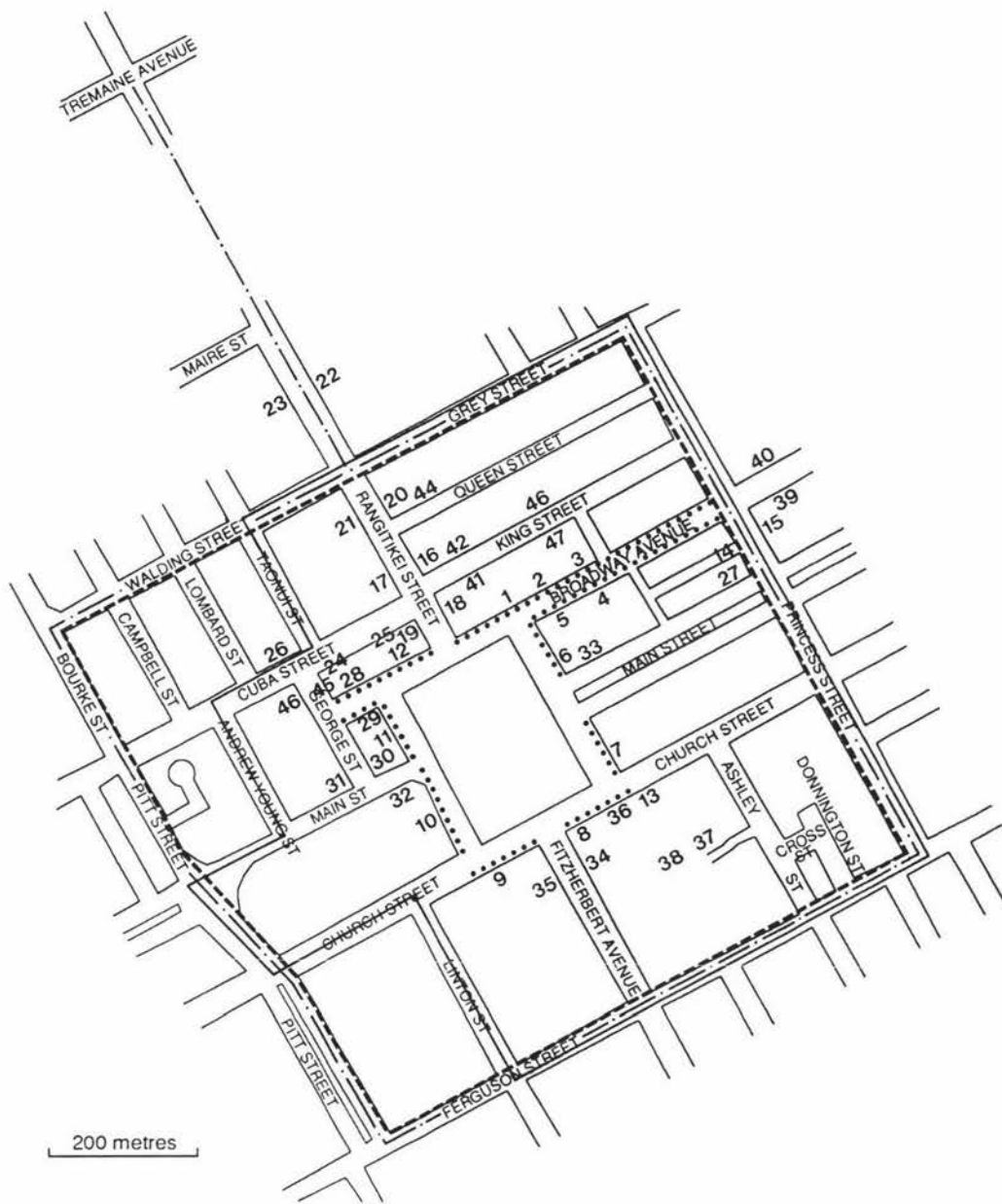


Fig 2 The locations of the local shopping centres.



- Review Number 3 Palmerston North District Scheme Central Area Boundary
- - - Central Area Re-numbering Exercise Boundary
- Vacant Retail Space Study Central Area Boundary
- 47 Pedestrian count locations
- Designated Central Area Frontage

Pedestrian Count Locations

- | | | |
|---------------------------------|-------------------------------|----------------------------------|
| 1 Barefoot Original-Countrywide | 17 Meechway Shoe Repairs | 33 Rear of Downtown |
| 2 GQ Clothing/Warnocks | 18 Westpac | 34 Kiwi Books |
| 3 Wilson Jeweller | 19 Moxon Jewellers/Post Bank | 35 Bruce Watt |
| 4 Outdoor Living | 20 Old Flame Restaurant | 36 Plaza Redevelopment |
| 5 AMP/Bennetts | 21 State Insurance Carpark | 37 Plaza-Rear Entrance-Foodtown |
| 6 Seiko/Pizazz | 22 Phil Turnbull Motor Cycles | 38 Plaza-Rear Entrance-Carpark |
| 7 Carthews/Glassons | 23 Leader & Watt | 39 Pink Chemist-Graham Wilton |
| 8 Upstairs Downstairs/United | 24 Tune Inn/Sports News | 40 Semper Building |
| 9 Westmark House | 25 Fox & Firkin | 41 Deka/Farmers |
| 10 Victoria Tdg/Man. TV Sound | 26 Club Londons/PWF | 42 Whitcoulls |
| 11 Keith Plier/Leader & Watt | 27 Kellys Shoes | 43 PSIS |
| 12 UFS/Telecom | 28 Hallensteins | 44 Used Furniture/Willie Weavers |
| 13 Plaza-Main Entrance | 29 ANZ (Coleman Mall) | 45 Payless Plastics |
| 14 Princeway Cakes | 30 Vacant Carpark | 46 Total Plastics |
| 15 NZ Post/House of China | 31 Amusement Centre | 47 Tisdalls-King Street |
| 16 Royal Tavern | 32 Little Shop/Brian Gaskin | |

Fig 3 The Central Area boundaries.

The importance of the central city area for retailing has been maintained (to a certain extent) by planning legislation - especially by zoning. The City Council¹ remains committed to protecting the importance of the central city area as demonstrated by one of the three new strategies² within the 1991 / 1992 Corporate Plan, that is, 'To encourage the development of a strong and vibrant Central Business District' (Palmerston North City Council, 1991). Its commitment to the Central Business District is further reflected by the allocation of \$200 000 to support '... a development initiative for the George Street and Coleman Mall³ area. This will include research into the possibility of siting the Public Library in this area' (Palmerston North City Council, 1991, 16). The Council already owns a number of buildings in this area of the Square (figs 4 and 5). Although the Central Business District is still the main shopping area, there has been considerable movement by retailers (particularly) within the central area. Within the last year, for example, 34 new shops⁴ have opened in the Central Business District and 21 shops have relocated. Six shops were closed during this time. (Thomas, 1991).

¹ The Palmerston North City Council has also made itself responsible for the provision of car-parking within the central area.

² A strategy is a specific statement which identifies '... what the Council wishes to achieve' (Palmerston North City Council, 1991, 134).

³ Coleman Mall is sometimes referred to as Coleman Place.

⁴ These figures have been adjusted (in line with the definition used in the Case Study) so that only those outlets who are predominantly involved in the selling of goods are counted as 'retailers'.

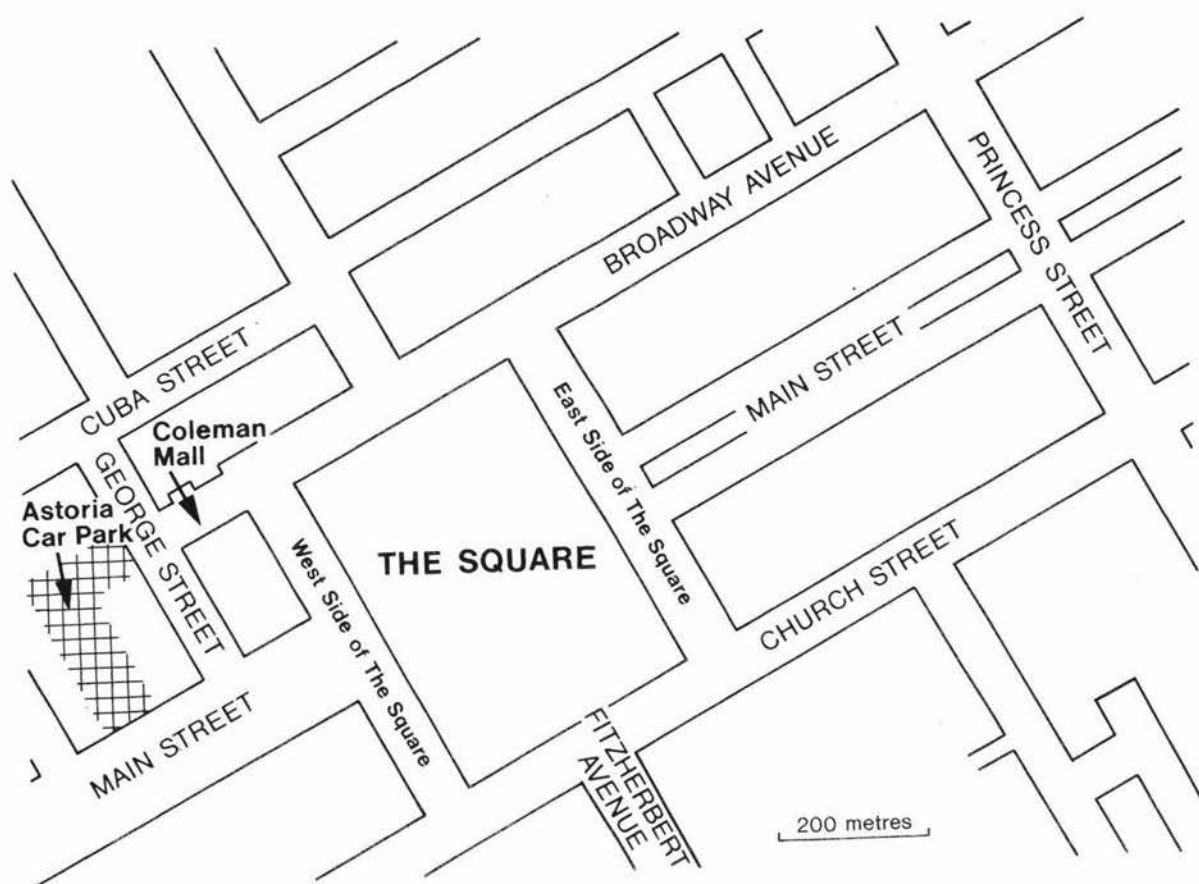


Fig 4

The Square.



Fig 5

Coleman Mall circa mid 1980s.

Planning in New Zealand.

Land use in New Zealand was controlled, until October 1991, by the 1953 and 1977 Town and Country Planning Acts. This statute has since been superseded by the Resource Management Act. As most of the retailers discussed in the case study were established under the provisions of the Town and Country Planning Act, it is this act, and its effect on the location of retailing in Palmerston North, which is analysed.

Under the provisos of the Town and Country Planning Act, councils were required to have a District Scheme, the necessary contents of which were set out in Section 36 (2) of the Act. Every district scheme had to include:

'(a) A statement of the particular objectives and purposes of the scheme and the policies to achieve them;

(b) An indication of the means by which, and the sequence in which, the objectives, purposes, and policies will be implemented and achieved;

(c) A code of ordinances for its administration and implementation, and a map or maps illustrating the proposals for the development of the area; and

(d) Such other particulars and material as the Council considers necessary for the proper explanation of the scheme' (Town and Country Planning Act, 1991).

All District Schemes were also required to

'... provide for such controls, prohibitions, and incentives relating to the use and development of any land, area, or building as are necessary or desirable to promote the purposes and objectives of the district scheme'. (Section 36 (3), Town and Country Planning Act, 1991).

Although zoning was and is used by practically all councils, the term 'zone' or 'zoning' was not used in the Act. Land did not need to be zoned but this was the '... technique commonly used to comply with the requirements of S 36(3)' (Sheppard, 1991).

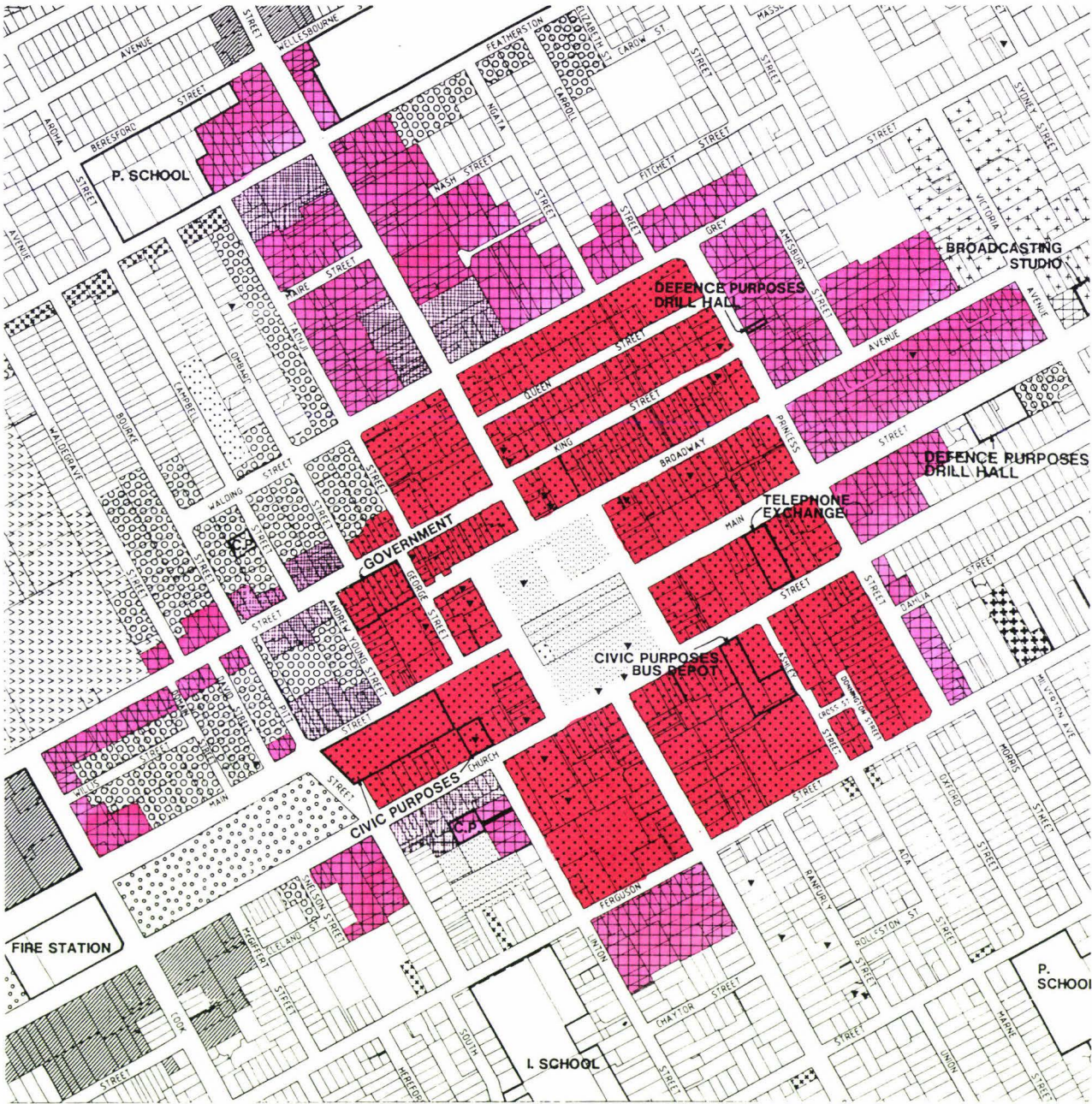
Zoning which originated in Germany¹ last century has since been used extensively in the United States of America as well as in New Zealand. The purpose of zoning is to '... concentrate compatible land uses and to segregate incompatible ones' (Allan, 1986, 50). In Palmerston North the Central Business District is zoned Central Area Commercial (fig 6). In Review Number Three of the District Scheme, the predominant uses (that is, those uses where '... specific consent is not required, if the controls listed in the District Scheme are met' (Palmerston North City Council, 1987, 6)) for this zone include shops, offices, theatres and cinemas, libraries, restaurants and hotels and taverns. (Palmerston North City Council, 1991, 56). A limited degree of retailing is permissible in other zones². The objective of the Suburban Commercial zone, for example, is to provide a '... range of shops and commercial activities appropriate to the needs of, and within easy access to, the surrounding suburban population'. (Palmerston North City Council, 1991, 74). It is stated that

'... suburban shopping centres should not be artificially controlled in terms of the extent of the zone or the variety of activities permitted. Rather, market forces should be allowed to determine the size of the zone ...' (Palmerston North City Council, 1991, 74)

The size of individual functions are however restricted in this zone so (it is claimed) a mix of functions can be offered. (Palmerston North City Council, 1991). These restrictions effectively prevent shopping centres within the city boundary competing directly with the Central Business District.

¹ This information was gathered from an interview with Caroline Miller, Senior Resource Management Planner for the Palmerston North City Council.

² In the Central Fringe Commercial Zone, two Subzones are used. In Subzone A the permissible range of shops is unrestricted whereas in Subzone B only a limited range of retail uses are allowed. The predominant uses in the Mid-Broadway Commercial Zone include shops for the sale of food and take-away bars excluding Butcheries and Green Grocers. The gross floor area must not more than 100 metres squared. The 'Objective' of the Terrace End Commercial Zone is to '... provide for a level and range of retailing, commercial and professional services and associated activities of a scale and intensity which is greater than that appropriate in suburban shopping centres but less than that found in the Central Area ...' (Palmerston North City, 1991, 71). (The area of the shopping centre has not been increased). Within the Commercial Services Zone and the Industrial Zone the size and type of retail outlet is restricted.



-  Central Fringe Commercial
sub zone A
-  Central Fringe Commercial
sub zone B
-  Central Area Commercial

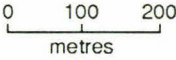


Fig 6 The Central Area Zones.

Locational Shift by Central City Retailers in Palmerston North.

The focus of this case study is some aspects of the locational changes made by central city retailers in Palmerston North between 1977 and 1991. The study is in two parts. The first (and main) area concentrates on the general locational changes occurring on 'High Street' while the second part is a micro-locational study which analyses the changes which have occurred in the mall/shopping centre developments within the central city.

In choosing a focus for the case study, the problem was not what to examine but rather what could or had to be abandoned. This does not pre-suppose that those areas not focused on were thought to be less legitimate topics of study¹. Initially, for example, the locational shifts by central city retailers were going to be studied in association with investor change (by using ownership information) in an attempt to discover whether institutional investors had a significant impact on the retailing sector in Palmerston North in terms of building new outlets and complexes (and the location of such) and if the sector was following overseas trends by becoming more internationalised. It was thought that the source of investment may be influential in the locational decisions made by retailers. It could be expected, for example, that large national or international retail firms may be more dominant in the prime central city locations (because they could more easily afford the higher costs involved) in comparison to a small locally owned operation. Unfortunately the cost of title-searches meant this area of study had to be abandoned².

¹ Other topic areas which were considered included; the impact of E.D.I. (Electronic Data Interchange) in retail outlets on suppliers and on stock control and employment figures within the industry, the change in the predominant types of retailing (for example, the department store, the specialist retailer) and the changing age-sex structure of the industry.

² The information on the ownership of retail outlets held by the Palmerston North City Council (for rate purposes) only gave the name of the owner if they paid the rates - in most cases however, it is the leasees who pay the rates.

The Locational Shifts which have occurred on 'High Street'.

In order to gain an insight into the extent of locational shift by central city retailers over the last fifteen or so years, with the emphasis on the most recent changes, three main sources of empirical information were used. They were; 1. information collected by the Palmerston North City Council in 1977 when the central city area was re-numbered (and a 1991 up-date), 2. pedestrian counts for the central city and 3. a study commissioned by the Corporate Policy Unit of the Palmerston North City Council on the level of vacant retail space in the Central Business District as at July 1991. (Leslie, 1991).

The Central City Boundaries.

Although the three empirical studies focused on the Central City Area, the boundaries used for each were different (fig 3). The area involved in the Central Area re-numbering exercise is larger than the designated Central Area in the third review of the District Scheme in that it contains Rangitikei Street. These differences and the incompleteness of the Central Area re-numbering data set¹ are unfortunate but as the main shopping areas are included in each information set the effect of these irregularities were considered insignificant.

Re-numbering of the Central City Area.

In 1977, it was decided that 'The Square', which had up until this time been numbered in a clockwise direction should instead be numbered in an anti-clockwise manner. This re-numbering exercise not only involved the allocation of new numbers but also the recording of the name and location of each (predominantly ground floor) business in the Central City Area (fig 3). Between September 17 and September 24, 1991 (inclusive) this exercise was

¹ Those areas missing from the Central City re-numbering exercise are; the south side of King Street, the north side of Grey Street (between Princess and Rangitikei Streets), Walding Street (in 1977 this street was known as the Grey Street extension), the west side of Bourke Street (between Grey and Cuba Streets), Pitt Street (between Church and Cuba Streets), the west side of Pitt Street (between Church and Ferguson Streets), the south side of Ferguson Street (between Pitt and Princess Streets), the east side of Princess Street (between Grey and Ferguson Streets) and the east side of Rangitikei Street (between Featherston Street and Tremaine Avenue).

repeated by the writer (except for the allocation of new numbers!), in an attempt to gain some understanding of the the volume of locational shift made by central city retailers in the last fourteen years. As only two time snap shots are compared the results gained from this exercise can only be used as a very general guide as to the level of movement by central city retailers.

Defining the term Retailing.

Any analysis focusing on the volume of locational shift by retailers will ultimately be dependant upon the definition of the term retailing. Dawson (1986, 3) defines retailing as all outlets involved in the distribution and sale of goods and services to final consumers. To keep the case study manageable, however, it was decided that the focus would be on what is commonly referred to as 'the shops' - those outlets primarily involved in the sale of goods. As some outlets are involved in both the sale of goods *and* of services, the task they predominantly perform was used to decide whether, for the purposes of this study, they were considered to be a 'retailer'. For example, electrical appliance repair outlets were not included if it was thought their main area of business involved repairs (that is, a service) even though they may also sell a number of appliances. Without detailed financial accounts from the businesses concerned such decisions are a matter of interpretation.

The distinction between the selling of goods and of services has become increasingly blurred. Some traditional sellers of services, have 'up-marketed' their image and become much more visible on 'High Street'. The legal firm Fitzherbert Rowe, for example, now operates The Law Shop on the ground floor of the Farmers Mutual building in The Square (between the west side of Church Street and Fitzherbert Avenue fig 4) and advertises the 'services' it can offer in the local newspapers. These include the free preparation of a standard will (should it be requested) while they are conducting the legal arrangements involved in the purchasing and/or selling of a house. (Advertisement in The Tribune, 1991). (fig 7).

BUYING OR SELLING A HOUSE?

TEN GOOD REASONS TO USE

THELAWSHOP

... is easy to get to, on the ground floor of Farmers Mutual Building next to the Manawatu Standard in the Square.

... offers a friendly efficient personal service.

... is staffed by approachable experienced people supervised by Partners of Fitzherbert Rowe, the District's largest legal firm

... keeps you informed about your sale or purchase. You get a comprehensive letter as soon as we get the agreement and another when the transaction is completed.

... uses plain language, gives estimates and charges reasonable prices. This means you will understand your transaction and you will know what it will cost.

... specialises in standard legal services for buyers and sellers of property; we want to help you - and our offices are down at street level and are designed to make you feel at home.

... staff answer their own telephones when you call. If you have to leave a message they will call you back as soon as they are able.

... operates at hours that suit you - 10 am to 6 pm Monday to Friday.

... will prepare a standard will for first home buyers at no charge (if you request it) when they do your house legal work.

... has on site car parking for Real Estate Agents and customers directly behind the office. Ask for directions when you telephone us.

THELAWSHOP

Farmers Mutual House, 68 The Square, Palmerston North. Ph (06) 356-9869
THE LAW SHOP is a branch of Fitzherbert Rowe, Lawyers

Fig 7

Advertisement in The Tribune for The Law Shop, 1991.

Factors affecting results of the Central City Re-numbering exercise.

The number of retailers which have shifted into different premises since 1977 will be affected by several factors which may either under or over-estimate the volume of movement which has occurred. The movement by retail outlets on more than one occasion between 1977 and 1991 will not be recorded and will therefore under-estimate the number of locational changes which have occurred while the adoption of a new name by an outlet. Conversely the ownership and range of goods traded remains constant will over-estimate the level of movement that has occurred. The original data set did not include those retail outlets which were contained within mall or arcade-type structures. In 1977 this involved those retail outlets located within Broadway Mall, Stafford Arcade (now The Link), the C.M.L. (Colonial Mutual Life Assurance Society) building (ground floor only) and the Commercial Union (C.U.) Arcade (ground floor only) (fig 8). The locational shifts made by outlets into or out of these centres to or from locations outside the central area or within in these centres will therefore not be recorded. Other factors which may under or over-estimate the level of movement by retailers are problems associated with site identification (and numbering) and deciphering the actual name of the outlet. (The name of one outlet, for example, was painted on the lamp-post outside the shop entrance rather than on the front window or on an overhead street sign). Only a very small proportion of the shops are numbered so aerial photographs (with overlays of site numbers) and the telephone directory were used to locate businesses wherever possible. Numbering retail outlets was especially a problem when buildings had been substantially renovated or rebuilt (as is the case for a number of buildings on Broadway Avenue). Therefore for some outlets in the 1991 data set (appendix A) the location written on the outside of the shop or in the phone directory is given in brackets - even when there are some obvious discrepancies as is the case for Scotneys (a manchester shop) and Arthur Toye (a material shop) who are located next door to each other in The Square. The location given for Scotneys is 191-195 whereas Arthur Toye's location is given as 191-194 The Square!

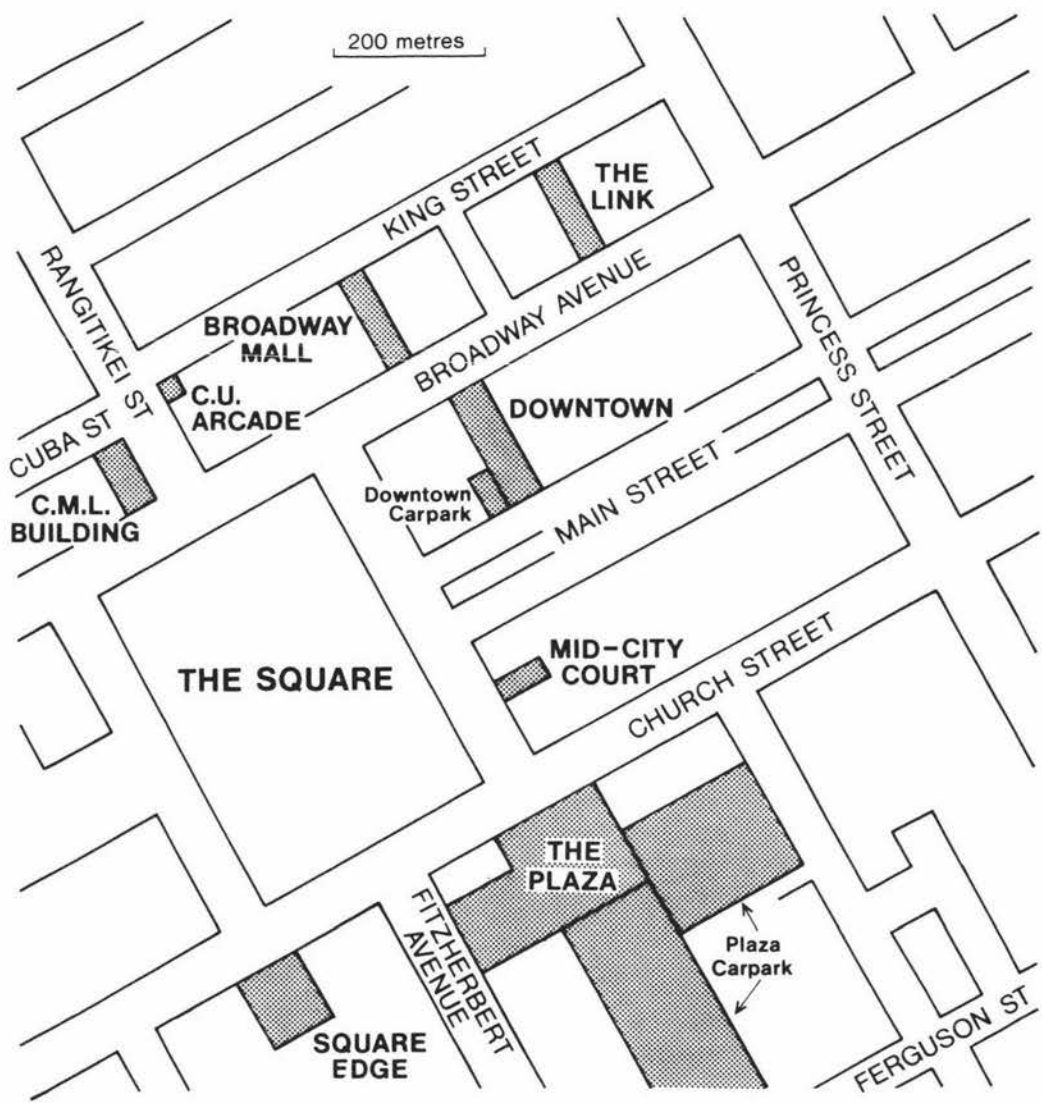


Fig 8 The location of the shopping malls/arcades.

Pedestrian Counts.

Pedestrian Counts are used by the Valuation Department to place a value on a retail outlet. Those locations which have the highest average number of pedestrians passing their entrances are given the highest government valuation. The results from these pedestrian counts are then recorded using percentage figures. The location with the highest pedestrian count is represented by 100 per cent with all other results given as a percentage of the highest count.

This technique assumes that the number of pedestrians moving past an outlet is directly related to the number of customers the retailer will attract. A good location is therefore thought to be one where the pedestrian flows are greatest. Although the use of pedestrian counts for valuation purposes appears to be universally accepted¹, the results gathered using this technique can be distorted by, for example, the location of (free) car parks, the temporary closure or disruption caused by extensive store renovations or the recent opening of a new shopping centre - as was the case in the 1991 Pedestrian Count (not used in this thesis). This was recorded two weeks after the Downtown complex (in Broadway Avenue) commenced trading and while the extensions to the P.D.C.² (Premier Drapery Company) Plaza (now known as The Plaza) between Church and Ferguson Streets³ was still under construction.

Vacant Retail Space (in the C.B.D.).

This study which was conducted over the period 10-12 June 1991 (and subsequently up-dated to 19 July 1991) assessed the amount of vacant retail space available within the Central Business District. As the predominant uses, within the Central Area Commercial zone

¹ No articles on the use (or validity) of this technique exist in the Planning Abstracts between 1985 and 1991/7.

² The P.D.C. was a co-operatively owned retail outlet.

³ The Plaza (which includes K-Mart) occupies land between Church and Ferguson Streets. The Ferguson Street side has a large car-park in front of it, which means that shops on the Ferguson Street side do not have street frontage as do the three shops which front Church Street.

include, as well as retailing, offices and places of public and private assembly (Palmerston North City Council, 1987), the vacant space was divided into seven different categories. These categories were: vacant space destined for retail use; space occupied but available for lease, and space occupied by a temporary tenant; vacant space destined for retail or office use (including mezzanine and first floor space in central city malls and arcades); vacant space that has already been tenanted, for example, the Plaza (at that time) development (The extended Plaza, including K-Mart opened on August 4 1991); space under development, destined for retail use (the Waldegrave Estate on Broadway Avenue which contained the State Theatre); vacant land for sale; unallocated space (the Regent and Odeon theatres and the Government buildings in George Street) (Leslie, 1991, 1).

Reasons for using three empirical studies.

The reasons behind using these three different empirical studies were to provide a fuller understanding of the changes which have occurred and to see whether the results found in one were reflected in the other studies. For example, were retailers shifting to areas where pedestrian flows were higher?. Was the decision made by one retailer to move from a certain area a decision also made by a number of other retailers in that area? - A phenomenon which may, for example, be demonstrated by a higher than average vacancy rate.

Results of the Central Area 'Re-numbering' Study.

Within the limits of the available data set it was found that there were 360 retail outlets in the central city area in 1977 compared to 349¹ in 1991 (appendix A). Between 1977 and 1991 there were 374 changes. Changes involve either the termination of a retail business, a change of location by a retail outlet (either within or moving outside the Central City Area), or a change of use between 1977 and 1991, that is, a site used for some other purpose² besides

¹ Only those businesses which could be clearly identified as retail outlets were used in the calculations.

² A change from a non-retail use to a retail use was counted on a per site (or per building depending on the circumstances) basis. Therefore a change in usage for a site was counted as one change regardless of the number of retail outlets presently occupying the site.

retailing in 1977 and which is used for retailing in 1991 or a former (in 1977) retail outlet or site which is either now used for a different purpose or is vacant. Although it appears that there are now fewer retailers these figures do not (as aforementioned) include outlets located within malls/shopping centres. There are more of these centres in 1991 than there were in 1977 with The Plaza alone containing forty outlets - only three of which were included in the 1991 update because they also had shop frontage onto Church Street¹.

Many of the locational changes which have occurred between 1977 and 1991 (appendix A) involve shifts within the Central City Area. The craft shop, Gallery Ten, for example, has shifted into the next-door premises - moving from 68 to 66 Princess Street while Cooper's Mens Shoes have moved further along Broadway Avenue (fig 8). Locational shifts have also been associated with a change in the volume and range of goods sold by outlets. Hopwoods, for example, which was formerly located between Broadway Avenue and Main Street (where Downtown now is) used to sell an extensive selection of china, silverware, kitchenware and hardware items. It now occupies smaller premises in half of what was the Garners² Building which is also located between Broadway Avenue and Main Street and only has street frontage onto Main Street (fig 8). Hopwoods is now part of the nationwide group, Mitre Ten and is predominantly a hardware store which (still) caters for the home handy person rather than for tradespeople. The movement of Hallensteins (menswear) from Coleman Mall to the eastern side of The Square into what was (in 1977) the location of Millar and Giorgi (a predominantly men's clothing store) but had in more recent times been occupied by Glassons (a low to middle of the range 'ritzy' women's clothes shop who moved into the renovated Plaza (fig 8)) has been accompanied by an 'up-marketing' of the outlet's image. (The same firm which owns the Hallensteins stores also owns the Glassons 'chain'). Millar and Giorgi who were absent from the 'High Street' (and retailing altogether) for a time, are located (once again) in smaller premises on the eastern side of The Square (between Church and Main Streets) (fig 8). There has also been movement by retailers from the fringe of the central area into the centre and from the central area to the fringes. The Yarn Barn which sells wool and knitting cotton is

¹ The inclusion of such outlets followed the methodology used in the 1977 exercise, that is, those outlets which front onto the street are included even if they are part of a shopping centre development.

² This department store which shifted to premises in Linton Street has now closed.

now located on the western side of The Square between Church and Main Streets. In 1977 this shop was located in Cuba Street (north side). (fig 4). In common with a trend recognised overseas (Kaye, 1985) at least two furnishing stores (which does not include the department-type-stores which sold a range of goods which also included furnishing) have left the 'High Street' and are now located in off-centre locations on the fringe of the central area. Furniture Fair has shifted to Rangitikei Street (between Grey and Featherston Streets) and King and Teppett which was located in Broadway Avenue has shifted into Church Street (between Pitt and Snelson Streets) (fig 3). The lighting store E. P. Wix Ltd. has also shifted from Broadway Avenue and is now in Main Street between Princess Street and Victoria Avenue (fig 2).

Only sixty retailers are still located on the same site (or sites). A number of these retailers have, however, expanded as is the case with Manhattan Menswear who are located on the eastern side of The Square (between Main Street and Broadway Avenue). In 1977 they also owned another shop (on the same side of The Square), Gentleman Jiggs. The two outlets, which were separated by Radio and Electric House, have since been combined and trade under the one name - Manhattan Menswear (fig 4). Golden Take-away in Main Street have expanded their operation and now have a Restaurant on an adjoining site to their Take-away Bar (fig 8). Although H. L. Young Limited (a stationers/ bookshop) is still located on Broadway Avenue and is part of a nationwide chain - Paper Plus, it is now operating from smaller premises and sells a smaller range of goods. (fig 8).

Pedestrian Count Findings.

The most recent (1991) Pedestrian Count is not used in this study because of the costs involved in extracting this information from the Valuation Department and because of the aforementioned distortion in the results. In 1990, the highest pedestrian count¹ (Fig 9) was recorded outside Hannahs Countrywide Bank² on the north side of Broadway Avenue. The

¹ According to. Malcolm Thomas, Economic Analyst for the Palmerston North City Council, the highest pedestrian count (excluding the weekends) would now be recorded outside of Mc Donalds on the eastern side of The Square (between Church and Main Streets) with the largest pedestrian flows occurring along the eastern side of The Square between Broadway Avenue and The Plaza.

² This location also had the highest 'count' recorded in the 1973, 1978, 1981, 1984, 1985 and 1986 Pedestrian Counts but because the number of locations where counts were taken varied, the results

lowest counts (in 1990) were recorded outside Phil Turnbull Motor Cycles on the eastern side of Rangitikei Street (between Grey and Featherston Streets), on the northern side of Cuba Street outside Club Londons and on the south side of Main Street (between Pitt Street and The Square) outside The Little Shop and Brian Gaskin Fabrics. (fig 9). (Both the latter two shops have changed their location within the last year. Brian Gaskin Fabrics has shifted into new premises closer to George Street while The Little Shop is now located in Broadway Avenue). There were two locations in 1988¹ where the highest count was recorded. The locations were (on the eastern side of The Square) outside Seiko Pizazz (now Sweet Blues) and outside Carthews Glassons (now Hallensteins). In 1987 the highest count was also recorded outside Seiko Pizazz. The lowest counts in the 1987 and 1988 pedestrian counts were both recorded in George Street (fig 9).

from these 'counts' are not used. The 1987, 1988 and 1990 Pedestrian Counts all used the same locations (and number of locations) to record pedestrian numbers.

¹ A pedestrian count was not conducted in 1989.



Fig 9 The results of the Pedestrian Counts conducted in 1987, 1988 and 1990.

Vacant Retail Space Findings.

Leslie (1991, 2) found that there were 12 637 square metres of vacant retail space in the Central Area of Palmerston North as at 19 July 1991, of which 2 915 square metres was the building formerly known as Garners¹ which is located in Linton Street (between Church Street and Ferguson Street) (fig 3). Other sites of vacant retail space included 880 metres square in the Downtown complex (fig 8) and 941 metres square in the Cantlon² Building (fig 13) (which was formerly occupied by part of the P.D.C.). The highest levels of vacant retail space were found in the 'Queen-King' (Queen, King and Rangitikei Street) and the 'Fitzherbert' (Church Street west, Linton Street, Ferguson Street, Fitzherbert Avenue) areas (fig 3).

Common Findings found using the three empirical studies.

On the north side of Broadway Avenue (between The Square and Princess Street (fig 8)) more retailers still operate from the same location than on any other side of any of the other streets in the Central Area. Although there have been 25 locational shifts in this time, nine of the present retailers occupied the same site in 1977 (appendix A). The Square between Broadway Avenue and Coleman Mall (fig 4) has six retail outlets (the second highest retention count) which still operate from the same location. (This part of The Square includes the premises of Hannahs and the Countrywide Bank - the location where the highest pedestrian count was recorded in 1990).

There is, however, no clear pattern which suggests, in proportional terms, that those retailers who were located (in 1977) on the fringes of the Central Area were more likely to have changed their location than those located in the main shopping areas. Coleman Mall, for example, is one of the main shopping areas (the retail outlets have their shop frontages designated) but none of the four retail outlets (compared to 11 in 1977) now located in this part of The Square occupied the same sites in 1977. The lowest pedestrian counts in 1987

¹ In 1977 Garners were located in Broadway Avenue (south side). Since that time they moved to Linton Street.

² This building is now occupied by The Warehouse.

in the city (fig 4). In 1977 there were eleven retailers on the west side of George Street (fig 10) compared to fourteen in 1991. (These figures are distorted by the building of what was, originally, nine new shops on this side of George Street. In 1977 these shops were still under construction and were therefore not counted as retail outlets but were included in the changes count). Since 1977 there have been fourteen changes and only one outlet (The Vista - a craft shop) still operates from the same location. On the east side of George Street there were eight retail outlets (The D.I.C. (Direct Importer Company) and Willie Weavers are included in this count even though they also had other frontage) in 1977 compared to three in 1991. None of the outlets which were located on this side of George Street in 1977 were still there in 1991. Many of the streets on the fringe of the central area do not have a single retail outlet which still occupies the same site as it did in 1977 but in most cases these streets were/are not important in terms of the number of outlets, retailing areas. Although there are still four retail outlets located in Taonui Street in 1991 the actual retail businesses have changed during the time period.



Fig 10

George Street.

Although Leslie (1991) claims, albeit tentatively, that the city is experiencing a major shift in retailing away from '... Queen, King, Rangitikei, George and Cuba Streets ...' (Leslie, 1991, 4) (fig 3) the central city re-numbering exercise demonstrates that these areas were not major retailing streets in 1977. For example, in 1977 Queen Street contained six retail outlets compared to five in 1991. The north side of King Street had the same number of outlets in 1991 as it did in 1977, that is seven, despite there been a number of empty buildings in 1991. The number of retail outlets with shop frontages onto Cuba Street actually increased from 29 to 32 between 1977 and 1991. In Rangitikei Street (between The Square and Grey/Walding Streets) the number of retail outlets has however fallen from sixteen to ten between 1977 and 1991. In comparison to Broadway Avenue, for example, which contained 57 outlets in 1977 and 53 in 1991 these streets were not important (in numerical terms) retailing areas even in 1977. None of the pedestrian counts recorded in these streets in 1990 were higher than 38 per cent (and this figure which was recorded in King Street could be influenced by its proximity to a bus stop). Three of the counts appeared to be distorted (in that they were a lot higher than in previous years) as revealed by a 'Check Count'. Therefore the figures recorded in the check count were used.

Change in Retail Outlet Type.

As well as using the Central City Renumbering data set to demonstrate the level of locational changes made by retailers in the Central Area the information can also be used to show the changes which have occurred in the type of retail outlets. Some outlets could be placed in more than one category because of the range of goods sold. These outlets were therefore categorised using the predominant good traded - such decisions are a matter of interpretation. For example, Abode Interiors (fig 11) sells a range of goods which includes kitchen ware, furnishing, china, glassware and manchester but because it mostly sells 'up-market' kitchenware items it is included in that category.



Fig 11 Abode Interiors.

Since 1977 (appendix B) there has been a decline (within the central area at least) in the number of individually owned butcheries (from six to one), green grocers (from six to one), fish shops¹ (from three to one) and cake shops (from eight to two). It can probably be assumed that the opening of two more large supermarkets within the central area - Foodtown and Pak' n Save (Woolworths was already in its present location in 1977) with their own butchery, produce, fish and bakery departments and their ability to sell such goods at lower prices due to their economies of scale and more 'efficient' operations (in terms of the number of staff needed to serve the customers) has detrimentally affected the trade of the individually owned and operated shops. The number of Department/Variety Stores has also declined from seven to three. This is partly due to amalgamations, for example, the McKenzies variety (and supermarkets) stores were taken over by Woolworth's² whose variety stores are now trading as Deka and the recently launched (nationwide) Brinkleys store which are owned by

¹ This does not include Fish and Chip Take-away outlets which may also sell a limited amount of fresh fish.

² Different firms now own the Woolworths supermarket chain and the Woolworths (Deka) variety chain.

the former staff of Smith's City. Smith's City consisted of a number of former department stores. For example, Irvin and Stern and Smith, Brown and Maple. In 1977 Maple was trading as a separate entity in Palmerston North in the building which is now occupied by Galvins and Mc Donalds on the eastern side of The Square (between Church and Main Streets). Other department stores, for example the P.D.C. and Arthur Barnett (formerly the D.I.C. (fig 12)) have closed altogether. The South Island based firm Arthur Barnett who bought the former D.I.C. stores in the North Island have retrenched their operations and are now only operating three stores in the South Island.



Fig 12

The D.I.C. building which in more recent times was owned by Arthur Barnett. The building is at present vacant.

In line with overseas trends with shopping becoming more of a leisure activity there has been a big increase in the number of Restaurants/ Coffee Lounge's/Take-away Bars. In 1977 there were 33 of these outlets compared to 51 in 1991.(appendix B) New types of retailing have also appeared within this time period with the evolution of new products, for example, outlets specialising in the sale of personal computers and computer accessories.

Micro-Locational Study.

The micro-locational study involves analysing the type and location of outlets (and the position of vacant sites) in the mall/shopping complex developments. The study involves The Plaza, Mid-City Court, Downtown, Broadway Mall, The Link, the Commercial Union Arcade (ground floor only) and Square Edge (fig 8). (The ground floor of the C.M.L. (Colonial Mutual Life Assurance Society) has been redeveloped so that all the outlets (except for the Dynasty Restaurant) now have street frontage which is why the C.M.L. building does not appear in this micro-locational study). As the sites and (remaining) tenants in Fitzherbert Market (in the front part of the former Alexander Clarke building in Fitzherbert Avenue) are in a permanent state of flux it was decided that little advantage would be gained from focusing on the type and location of tenants and the vacant sites within this centre. The Regent Arcade (which runs between Broadway Avenue and King Street (fig 8) and Coleman Mall (fig 5) are not analysed as all these shops have street frontage. The information in this study was collected (except for the Commercial Union Arcade) on October 11 1991. The data for the Commercial Union Arcade was collected on October 25 1991.

The Plaza.

The layout of shopping complexes and the position and type of tenants within them have also experienced a number of changes. The Plaza, for example, has only been operating since 1986 but its design has been changed a number of times and there have been a number of tenancy changes either involving shifts within the complex or out of The Plaza altogether (as well as closures). When The Plaza first opened (as the P.D.C. Plaza) it occupied part of the ground floor of the P.D.C. department store. The P.D.C. continued to operate in its remaining ground (street level) floor areas and on the first and second floors¹ most of which could be accessed from within The Plaza. When it went into receivership for

¹ Some parts of the P.D.C. only had one level whereas the building known as The Cantlon building has two and the P.D.C. building itself had three floors.

the second time in 1989 (and ceased trading on January 16 1990) the site was sold to a wholly-owned subsidiary of Trust Bank, New Zealand who in partnership with Coles Myer (Manawatu Evening Standard, August 3, 1991) decided to extend The Plaza (which would include a K-Mart variety store¹) by rebuilding on some of the site occupied by the P.D.C. (figs 13, 14). The continual renovations to The Plaza and the demolition of the P.D.C. building before the end of its useful life demonstrate how past investments in the built environment can imprison and inhibit the accumulation process. (Harvey, 1985b).



Fig 13

The P.D.C. and Cantlon buildings from Church Street. Foodtown is the building at the back on the left hand side.

¹ There was already a Foodtown supermarket adjacent to the original Plaza. In New Zealand (but not in Australia) Coles Myer own the Foodtown supermarket chain of stores as well as K-Mart.



Fig 14 The Church Street entrance to the Plaza.

The extensions to The Plaza appear¹ to have altered the pedestrian flow within the shopping complex. More people seem to enter The Plaza either from the main Church Street entrance or via the entrance next to K-Mart (which opens onto the main free car parking area) (fig 15) and move past the shops located in a linear fashion between K-Mart and Balfour's Plaza Pharmacy. (fig 16).

¹ There does not appear to be any statistical information available which could confirm this observation.

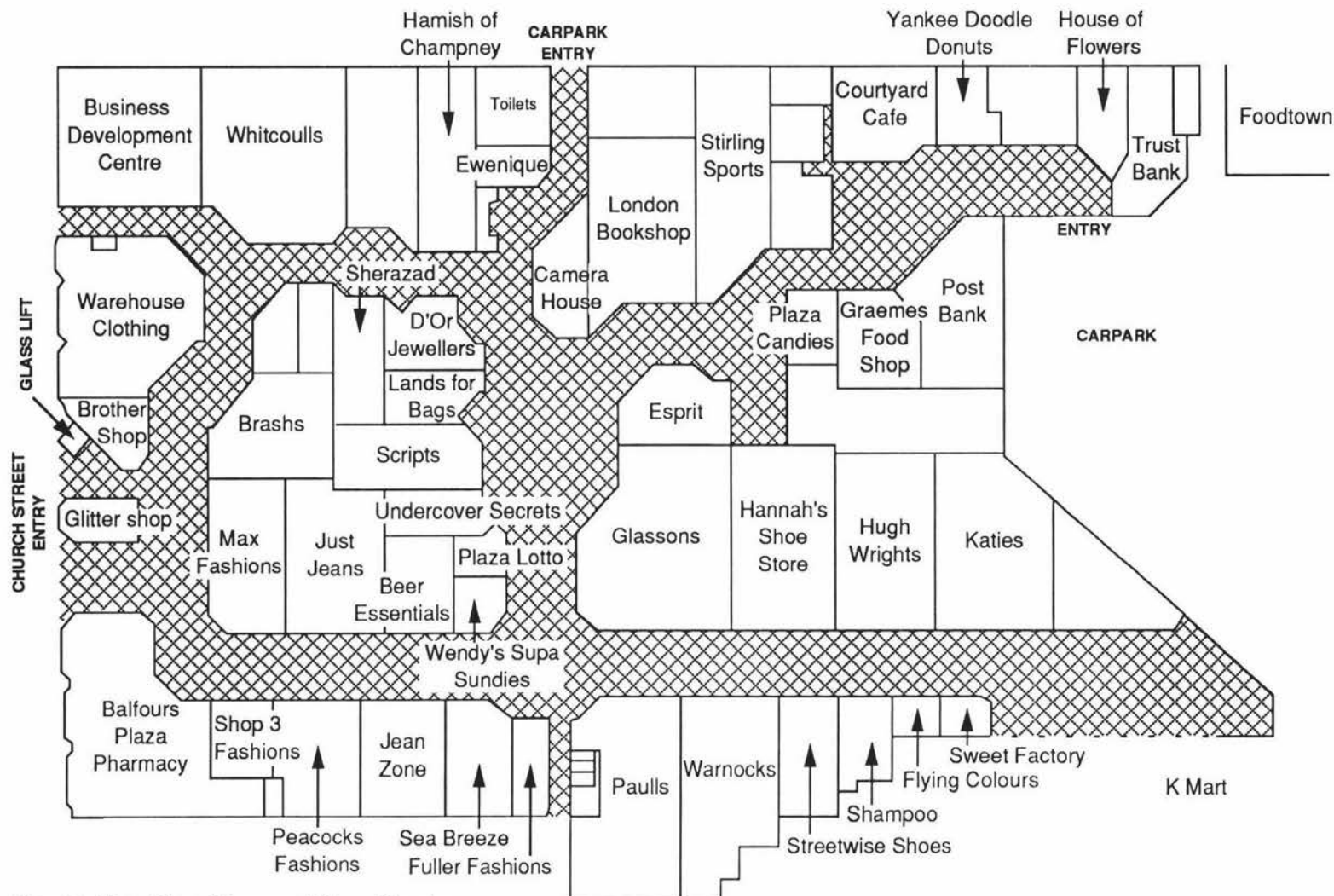


Fig 15

The K-Mart entrance and some of The Plaza Car Park.

Fig 16

Floor plan of the Plaza.



Source The Plaza Shoppers/Store Directory.

The other people-attracting area is located near the entrance closest to Foodtown which contains food outlets and two banks. Most people get to this part of The Plaza by either walking past Wendy's Supa Sundaes, Plaza Lotto, Glassons, Esprit and London Books or by using the entrance next to Foodtown. They are less likely to use the Church Street entrance and walk past (among other outlets) Warehouse Clothing (fig 16). Before the latest renovations to The Plaza, moving through this area, especially past Whitcoulls and Brash's was often difficult because of the large number of people. This now appears to be the most quiet (in terms of the numbers of people) part of the complex and contains one of the five vacant sites within the centre.

With the redevelopment to The Plaza (and the demolition of their outlets), Balfour's Pharmacy and one of the Jean Zone shops (now called Shop 3 Fashions) moved from being next to the former Ferguson Street entrance to the Church Street side of the complex (fig 16). Other outlets such as Peacocks Fashions (which was formerly located next to Plaza Candies) and Warnocks which were not forced to move (at least not because the structural changes involving the demolition of their sites) have also shifted to the other side of the centre. Peacocks is now located next to Shop 3 Fashions and Jean Zone, while Warnocks has moved towards K-Mart and is positioned between Paulls (who shifted from part of the building, which was, in 1977 occupied by Maple on the corner of Church Street and The Square) and Streetwise. The site formerly occupied by Peacocks is at present vacant. With the latest renovations this site has very few people moving past its frontage as Hannahs only has one entrance on the K-mart side of its outlet. Between Esprit and the former Peacocks Fashion site there is now a blank wall (fig 16). As well as attracting a number of new outlets to Palmerston North - seventeen of the 34 new retail outlets in the Central Business District are located within The Plaza (Thomas, 1991) the renovations also saw some tenants leaving The Plaza. The pet shop and a craft shop which were located near Balfour's Plaza Pharmacy and Jean Zone on the Ferguson Street side of the complex are two tenants which have moved. The craft shop - Needlecraft Distributors is now located on the fringe of the central area in Lombard Street (fig 3).

The Link.

The Link which was formerly known as Stafford Arcade (between the north side of Broadway Avenue and south side of King Street) has also been renovated (figs 17, 18). Unlike The Plaza, however, The Link appears to have a problem attracting people and outlets to the centre. When the data was collected for this case study all except one of the retail outlet spaces were occupied, but one of the sites had been vacant (or only occupied by temporary outlets) for some time prior to this and Lady L (one of the main attractants to the centre¹) was holding a closing down sale.



Fig 17

Stafford Arcade.

¹ According to Malcolm Thomas who is an Economic Analyst for the Palmerston North City Council.



Fig 18

The Link.

Mid-City Court.

Mid-City Court and Downtown have also had problems attracting retail outlets to their centres although Mid-City Court (which is located on the eastern side of The Square between Church and Main Streets) was fully occupied (on the ground floor at least) on October 11 1991. A number of its sites remained empty for a time after the centre began trading and at least one of its early tenants (Genies) has shifted out. (Genies is now located on the west side of Rangitikei Street - between The Square and Cuba Street)). (fig 8). Two of the retail outlets, Permanent Petals and Ritzy's Giftworld have relocated to this centre within the last year. (Thomas, 1991).

Downtown.

The developers of the Downtown centre have taken advantage of the shopping-as-a-leisure-activity trend by providing entertainment facilities in the form of six picture theatres on the first floor of the complex and a shopping centre at ground (street) level (figs 19, 20).



Fig 19

Downtown.



Fig 20

The Broadway Avenue entrance to Downtown.

Two outlets (Bennetts Bookshop and Central Power) which have street frontages onto Broadway Avenue can also be accessed from within the complex. Attached to the centre is Palmerston North's first parking building - which is jointly owned by the City Council. The (complete) shopping centre which opened earlier this year (the theatres opened in 1990) still has ten vacant sites two of which had, at the time the data was collected (October 11, 1991) notices attached announcing the imminent arrival of tenants in September 1991! These announcements have since been removed. The frontage of one of the vacant outlets is at present being altered - presumably for a particular tenant. A number of the vacant sites within the centre do not (at this time) appear to be attractive locations. This may alter once the Downtown parking building is more fully used by shoppers as two of the vacant sites are positioned opposite the elevators which give access to the parking building. Most people appear to enter the centre from Broadway Avenue and do not move past the Food Halls (fig 21). The difficulty in attracting people to move through the complete centre from the Broadway Avenue end of the complex is likely to remain unless 'high-people-attracting-outlets' decide to position themselves near the Main Street end of the centre (fig 8). At this time large numbers of people do not move along this part Main Street. In the 1990¹ pedestrian count, for example, the average number of people moving past this area was found to be 122 (in two half hour periods) in comparison to 507 pedestrians outside Hannahs-Countrywide Bank (the location where the highest count was recorded). The average number of people moving past the closest recording location to Downtown's Broadway Avenue entrance was found to be 284.

¹ Although these numbers have probably altered considerably since the opening of the shopping centre there still does not appear to be a large number of pedestrians using this part of Main Street.



Fig 21

The Food Halls in Downtown.

Broadway Mall.

Broadway Mall is located between Broadway Avenue (north side) and King Street (south side). It is the only shopping centre complex in Palmerston North with retail outlets on the first floor. Although less people seem to move through the centre in comparison to The Plaza and the Food Hall area of Downtown the tenants within this complex appear to be reasonably settled. This is demonstrated by there only being one new tenant moving into the centre and one tenant relocating to Broadway Avenue (Abode Interiors) within the last year. (Thomas, 1991). The vacant site left by Abode Interiors may, however, be difficult to find new occupants for due to its large size and location at the King Street end of the complex (fig 22).



Fig 22 Inside Broadway Mall.

The movement by Abode Interiors not only demonstrates one of the many locational changes which have occurred in the central area of Palmerston North but also a general trend (not recognised in the literature) towards smaller¹ retail outlets. New or renovated outlets are now less likely to have large storage areas as goods are able to be replaced quickly.

The retailers within Broadway Mall and Mid City Court try and attract some of the high² numbers of pedestrians which move past the entrances of these centres to their outlets by using free standing advertising signs on the footpath.

¹ This observation was made by Malcolm Thomas (Economic Analyst for the Palmerston North City Council) during an interview.

² Broadway Mall is located between two locations where the numbers of pedestrians are recorded. These two locations are Hannahs-Countrywide Bank (where the highest number of pedestrians were recorded in 1990) and G.Q. Clothing/Warnocks. The average number of pedestrians moving past G.Q. Clothing/Warnocks was 388 (or 77 per cent). The closest location (from which the number of pedestrian recordings are made) to Mid City Court was outside Carthews/Glassons. In 1990, an average of 443 people (87 per cent) were recorded moving past this location.

Commercial Union Building.

The ground floor shopping area of the Commercial Union Building only contains five possible retail sites, four of which have street frontage. There are two vacant sites within this centre and one of the outlets is occupied by a hair dresser (which for the purposes of this case study is not recorded as a 'retailer'). This shopping centre, which is located on the corner of Rangitikei and King Street, is not in a high pedestrian flow area.

Square Edge.

Unlike the other shopping complexes discussed, Square Edge is not located in a purpose-built (and mostly 'up-market') centre. Instead Square Edge occupies the old Council Chambers on the corner of The Square and west Church Street. The ground floor and the Court yard behind the building are predominantly occupied by retailers selling individually-made goods. It contains, for example, a pottery outlet - Potters Vault Co-operative and an outlet selling goods made from wool (Woolcraft). Although Square Edge appears to cater for an alternative market (to the other shopping centres) it also contains two coffee lounges/restaurants ('Sage' is opened during the day and on Friday night) and one food outlet - Calico Pie which mostly sells unprocessed bulk 'health' food.

The shopping centres' tenants.

All these shopping centres appear to have a similar range of tenants. In total they contain, for example, seventeen food outlets, 27 clothing shops (which includes lingerie and shoe shops), eight craft shops (most of which are in Square Edge), six jewellery shops, five gift shops and five bookshops. There are 100¹ retail outlets contained within these centres and they contain except for Square Edge and Mid City Court at least one vacant site - there are nineteen vacant sites contained within these centres.

¹ This number includes those outlets located at the entrance to these centres (which also have street frontage) and those retail outlets which can be entered from within the complexes.

Conclusion.

The case study demonstrated that between 1977 and 1991 there has been a high volume of movement within the central city area by retailers in Palmerston North. The main shopping area is still the 'High Street' but the popularity of locations within the central area have varied with time. The south east side of The Square used to be the 'dead' side but it is now one of the busiest shopping areas within the city especially since the opening of the extended Plaza.

The rapid locational changes made by central city retailers look set to continue. Since the surveys were conducted by the writer (in September and October 1991) there have been at least twelve locational changes within the inner central city area (that is, around The Square and within the shopping complexes). It has also been announced that the Brinkleys store in Palmerston North will close¹ as part of that firm's restructuring measures. The vacant Cantlon building (which was part of the P.D.C.)is now occupied by The Warehouse and two of the empty retail outlets in Coleman Mall have new tenants. According to the sign erected by the real estate firm responsible for leasing the complex, several of the vacant sites within the Downtown centre have also now been leased.

The locational changes have also been accompanied by a change in the number of certain types of retail outlets within the central city area. The number of outlets selling prepared food which can either be consumed on the premises, or taken away, has greatly increased since, 1977 while the number of green grocers, butcheries and cake shops has decreased.

The case study also demonstrated that in spite of the successful image portrayed by many of the shopping centres there are a number of vacant sites contained within these centres. Some of the general trends recognised in the literature such as the movement of furnishing stores out of the central city area and the evolution of the fun-shopping trend were also found to be apparent within the Palmerston North retailing sector.

¹ All Brinkleys stores have now ceased trading.

furnishing stores out of the central city area and the evolution of the fun-shopping trend were also found to be apparent within the Palmerston North retailing sector.

CONCLUSION.

Retail capital involves the final exchange of commodities. It is part of the wider circuit of capital yet at the same time it is driven by its own internal logic. (Ducatel and Blomley, 1990). Although the impacts of the rapid changes which are occurring within this sector may be unique to a specific location the changes themselves reflect the cyclical nature of economic development within capitalist societies and investment decisions made by investors whose primary motive is not to provide the population with retailing facilities but rather to accumulate wealth. The construction of more retailing outlets not only demonstrates an increase in user-demand but also the workings of the economy as a whole and the demand created by investors looking for opportunities into which they can invest their surplus capital funds.

Economic development within capitalist societies does not occur at some pre-determined rate but rather occurs in a wave-like manner with alternating periods of economic expansion and economic recession. Proponents of the Long Wave theory of economic development believe that each cycle of economic expansion begins with technological advances which create new products and new markets. Such development is not sustainable however and problems of over-production eventually lead to a period of economic recession until the next wave of economic expansion begins. Barras (1987) used the building industry to demonstrate the impacts of these cycles on a particular sector. Three cycles of differing periods were identified. The short and major supply cycles are both superimposed upon the long wave or urban development cycle which reflects the workings of the economy as a whole. The building industry is prone to problems of over and under-supply. This is partly because of the long delays involved within the construction process before an increase in demand is matched by an increase in available floorspace but also because demand for more floorspace is not only user-driven it is also investor-driven. The built environment can provide long term investment opportunities especially for institutional investors.

Capitalist societies are prone to problems of over-investment and over-accumulation. Over-investment and over-accumulation which are sometimes referred to as a crisis can occur

within a region, sector or in the economy as a whole. A number of different types of crises have been identified. The immobile nature of the built environment means it is particularly prone to the impacts of geographical switching crises which involve the transferring of investment funds from one location to another. As a result of such a crisis and investor-driven demand for more floorspace locations which are attractive to investors become over-supplied while less favourable areas find it difficult to secure funds.

Crises can also occur in each of the three circuits of capital. The tendency for individual capitalists to act in such a way that when aggregated runs counter to their own class interest is reflected in the primary circuit by for example the over-production of goods and/or excess productive capacity. Investors who have over-investment problems in the primary circuit of capital can switch their investments to the secondary circuit of capital. This circuit involves the production of goods which require different working and/or circulation periods. Fixed capital items which function as the built environment for the production process are referred to by Harvey (1985b) as the the built environment for production while those that function as the physical framework for the consumption process are referred to as the built environment for consumption. Some items in the built environment function for both the production and the consumption process. Although switching capital funds into the secondary circuit of capital appears to be a solution for investors who have over-accumulated in the primary circuit, the large scale and long term nature of investments in this circuit does create barriers for individual investors.

The use-value of the built environment for investors is to enhance the accumulation process. Although it is a representative form of capital it is the capital of past achievements and therefore inhibits further accumulation. This occurrence is demonstrated by the demolition of, for example, retail outlets before the end of their useful life. In Palmerston North this was reflected by the pulling down of the three-storeyed P.D.C. building which was replaced by a number of single storey shops.

Commercial capital refers to the commodities in the marketplace which are about to be turned into money capital and to money capital which is about to be turned into commodities. Retail capital is a subform of commercial capital. The distinctive form of retail capital within the

wider circuit of capital is the final exchange of commodities. (Ducatel and Blomley, 1990). The constant drain on a producer's profits caused by unsold commodities has led to the separation of productive and commercial capital. The relationship between productive and commercial capital involves the exchange of commodities imbued with surplus value. The merchant realizes the value of commodities at the point of sale. Both the producers and the merchants are solely concerned with the exchange value of a commodity (rather than its use value) and the retention of the largest share of its surplus value.

Traditionally retailing has been the domain of the *petit bourgeoisie*. The sector is now much more concentrated and is also increasingly becoming internationalized which has allowed the larger retail corporations to exert considerable pressure on the manufacturers and thus appropriate a higher proportion of the surplus value of commodities. Retailers have also attempted to increase their profits by reducing their overhead costs. This has been achieved by for example the deskilling of the workforce and the adoption of self-service formats. In a number of overseas locations it has also been achieved by retailers re-locating to cheaper out of town locations. The size of Palmerston North and the zoning restrictions has meant that this option is not available to central city retailers. Some retailers are however attempting to reduce overhead costs by operating from smaller outlets and are adopting just-in-time retailing techniques.

The inability of merchants to realize the value of goods is caused by a number of factors. One such factor is the fickleness of the consumer. Shopping is no longer just a necessity; it is also a social act. Retailers are taking advantage of the fun-shopping phenomenon by providing entertainment as well as shopping and shopping as well as entertainment. The Downtown complex in Palmerston North, for example, includes a shopping centre on the ground floor which also features six picture theatres on the first floor.

The development of telecommunications and associated technologies has enabled capitalist institutions to free themselves from national constraints. Local and national governments seem to be almost powerless in the face of this rapidly internationalizing capital. Due to the impacts of the 1973 recession urban governance has become much more entrepreneurial with retail planning becoming more *laissez faire*. The increasingly

international nature of retailing has not only resulted in a strengthening of the position of larger retailing corporations in their negotiations with manufacturers over the exchange values of commodities but also to internationally recognised and/or owned retail outlets in numerous 'High Streets' and shopping centres. Without detailed ownership information it was difficult to gauge the extent of the influence of local, national and internationally based investment on the retailing sector in Palmerston North. The number of known internationally linked retailers within the central area has however increased with the opening of, for example, K-Mart, Katies, McDonalds and Foodtown within the last seven years.

Although zoning regulations still place restrictions on the location of retail outlets the actions of the Palmerston North City Council while regulatory are also becoming more entrepreneurial. Extensive negotiations with K-Mart's owners, Coles Myer, eventually led to the building of the store on its present central city site with the council agreeing to pay half the costs of the necessary extensions to The Plaza car-park. The council wanted the store to be established within the main shopping area of the city and not on the fringes to avoid the possible evolution of two major shopping areas within the central city. Its commitment to the central city area is also demonstrated by its joint ownership of the Downtown car-parking building¹. While providing a service the building is also expected to make a profit (in the medium to long term).

The actions of the council while 'entrepreneurial' suggest that they are not as powerless in the face of internationalizing capital as Barras (1987) and Harvey (1989) would suggest. This discrepancy not only reflects the differences in the planning legislation between the United Kingdom and New Zealand. (planning in the United Kingdom is more administrative (Williams, 1985) and the system of planning gain is used) but is also a matter of scale. The inner city area of Palmerston North still has sites available for new retail developments and severe congestion problems do not occur. Unlike larger cities both in New Zealand and overseas Palmerston North is administered by one local authority. The impact of more than one local body controlling an urban area can result in competition between retailers in

¹ The information on the extent of the council's involvement with respect to the Plaza car-park extensions and the building of the Downtown car-parking building was supplied by Malcolm Thomas, Economic Analyst at the Palmerston North City Council.

different locations within the city. Central city retailers in Auckland, for example, are presently facing stiff competition from suburban shopping centres.

The main objective of this thesis has been to attempt an explanation of the relationship between the changes occurring in the retailing sector and those occurring in the economy as a whole. The empirical studies focusing on retail change described in the literature by Brown (1987a, b, c, 1988, 1990) were not used to analyse the changes which are occurring in the Palmerston North retailing sector, because of their over use of inductive techniques.. Although these studies can be used to describe the changes which can be observed, they do not explain why they have occurred or what has caused these changes to occur. Description is not the equivalent of explanation - describing the processes occurring within the retailing sector does not explain why they have occurred.

In spite of the importance of retailing to the economies of the advanced nations, the sector is inadequately researched. The available literature on retailing is limited and predominantly descriptive. The one notable exception is Ducatel and Blomley's (1990) article on retail capital.

In the past, the retailing industry has been analysed using quantitative techniques, for example, the central place theory and the behavioural approach. It has, however, been ignored by theorists who have adopted the alternative (Massey and Meegan, 1985) structuralist, Marxist or realist approaches. The separation of the traditionally male domain of the workplace from the home (or female domain), or the productive from the consumptive - implying non-productive sphere, has marginalised the importance of retailing as an activity. As 'women's work', there has been a tendency to trivialise the importance of shopping. It has been subsumed within the service sector literature as if it is not worthy of separate academic scholarship.

The high-profile and dynamic nature of the retailing industry is also not accompanied, in New Zealand at least, by sufficient data collation. These restrictions on the availability of quantitative information as well as data costs (which is a factor with most research) severely limit the possible foci of research on the retailing industry. The focus of the case study for this thesis, for example, was decided upon because the data was available. The very nature of the

quantitative information as well as data costs (which is a factor with most research) severely limit the possible foci of research on the retailing industry. The focus of the case study for this thesis, for example, was decided upon because the data was available. The very nature of the topic - some aspects of the locational changes made by central city retailers made it something the writer was trying to avoid - a descriptive study.

The retailing industry could be successfully examined using a feminist approach. Research which analyses the links between production and consumption is one way this could be achieved. One writer for example puts forward the thought-provoking idea that consumption is unpaid labour. (Gardner and Sheppard, 1989). Whichever feminist approach is adopted whether it be, for example, the socialist feminist (where the class structure, the capitalist economic system and patriarchy are believed to interact to oppress women (Andersen, 1983)) or the radical feminist approach (where patriarchy *per se* is thought to be the primary cause of women's oppression (Andersen, 1983, 235)) theoretically-informed research on the retailing industry could be conducted using this perspective. The adoption of the radical feminist approach, in which it is believed that although knowledge is a social creation the dominance of men in academia has meant that their way of viewing the world is presented as the truth, could for example go some way towards explaining why the act of shopping has been thought unworthy of serious academic analysis.

It is clear that whichever approach is to be used the development of an appropriate body of theory is something that requires attention.

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APPENDICES.

Appendix A.

THE SQUARE - COLEMAN PLACE TO CHURCH STREET

92

1977 COLEMAN PLACE	1991	Number	Number of Site
Bank	Wills Bookshop Corousel Cafe	1 2	1-3
DIC	Vacant	4-11	4-11
Leader and Watt Keith Plier Jeweller Entry - 1st Floor John's Meatmarket Casey's Menswear Cameo Curtains	Leader and Watt Keith Plier Jeweller Entry - 1st Floor Pizza Piazza Forget-Me-Not-Flowers	14 15 16 17 18 19	14-19
Chemist - Patron Pharmacy Pink Cake Shop Bottle Store Entry - Hotel Hendry and Moody Continental Delicatessan MAIN STREET Cameracade Rex Furnishing Doreen Dale PNCC Gas Department City Corporation	Chubb Security Willie Weavers Gracie's Mens Court Stephen Parson's House of Travel Trade Aid Shop McFee Restaurant PNCC Gas Department City Corporation	 27	20-26 27-38
Dudley Rabone	Manawatu TV and Sound Services	39-40	39-40
Entry - 1st Floor Piano Services Mark Twain Restaurant	Entry 1st Floor Old Istanbul-Turkish Kebab House Puddleducks	41A 41 42	41-42
Mitha Fruit Mart Loveday's Cake Shop	Mitha Fruit Mart Yarn Barn	43 44	43-44
Tingey's	Comfort Zone	45-46	
Vacant Hamish Hairstylists CHURCH STREET	Knitwit Fabrics Truelife Sophisticut (downstairs) Vacant	 51	47-51

THE SQUARE BETWEEN WEST CHURCH STREET AND EAST CHURCH STREET

CHURCH STREET Council Chambers	Square Edge/ Indigo Calico Pie	52-56	52-56
Joe Kwong Lee Standard Book Shop Entry - Evening Standard Office and Other Floors The Budget	Stylex Print Entry - Evening Standard Office and Other Floors		57-64
Colonial Furnishers Ideal Cake Shop Hodge Electrical Repairs Mr Meats Vacant Site FITZHERBERT AVENUE BNZ Modern Uniform Centre	Entry - Farmers Mutual The Law Shop - Fitzherbert Rowe (68) The National Bank Trust Bank Central BNZ		65-66 67-68 69-75 76-80

1977	1991	Number	Number of Site
Crystals Discount Fashion Fabric Shop National Bank Entry 1st Floor Michael Cross Pharmacy Upstairs and Downstairs	United Realty Iain Flyger - United Travel Centre Accent on Flowers Entry 1st Floor Michael Cross Pharmacy Upstairs and Downstairs	81 82 83 83A 84 85	81-85
Northern Building Society Entry - 1st and 3rd Floors PDC	United Building Society Vacant Balfour's Plaza Pharmacy Entry to Plaza	86-87	86-87 88-100
CHURCH STREET			

THE SQUARE CHURCH STREET TO BROADWAY AVENUE

CHURCH STREET Maple	Galvin's McDonalds	101-105	
Keith's Place Dawbin's Book Shop	Carthew's	106 107	106-107
Millar and Giorgi	Hallensteins	108-110	
Paddy Bros Entry - 1st Floor Joe and Joe	Stubbs Pacific Jeweller Sweet Dreams	111 111A 112	111-112
Sanitarium Health Foods Plumber's Merchants Long and Co. - Entry Bathroom Boutique	Oroton Showcase Mid City Court Entry (between 113-115) Dominion Television Rentals	113 114 115	113-115
Watson Bros. Entry - 1st Floor	Manawatu TV and Sound Service Ltd	116-119 120	116-120
Langwood's Hyde's Jewellers Taylor's Drycleaners Gerald Taylor	Millar and Giorgi Hyde's Jewellery Supercolour Copies Ltd Darryl Amy	121 122 123 124	121-125
MAIN STREET Post Office	Vacant - Temporary Shops	126-135	126-135
Manawatu TV and Sound Entry - 1st Floor Woollam's Chemist	Sweet Blues Entry - 1st Floor Seiko	136 136A 137	136-137
Erland Wright Christian Centre Wonder Wool	Payless Shoes	138 139 140	138-140
Cooper's Shoes Entry - 1st Floor Manhattan Menswear Radio and Electric House Gentleman Jiggs	Cooper's Shoes Entry - 1st Floor Manhattan Menswear		141-145
Bargain Books ANZ Bank BROADWAY AVENUE	ANZ Bank	146 147-150	146-150

THE SQUARE - BROADWAY TO COLEMAN PLACE

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1977	1991	Number	Number of Site
BROADWAY AVENUE Boots, The Chemist Hannah's Martin's Toy Shop Wimpy Entry 1st Floor Arthur Toye Ltd Estelle Rose	Mid City Amcal Chemist Hannah's Countrywide Bank (158) Deka (160)	151 152-155 156 157 158 159 160	151-160
Woolworths Peacocks Entry - 1st Floor Stubbs Jewellers Keith Plier Jewellers Linen House	Deka Sound City (166) Entry - 1st Floor Jean Zone (168-169)	161-162 166 167 168 168A 169	
Raymonde Fashions Betsy Lee BNZ Bank	BNZ Bank	170 171 172-175	170-175
RANGITIKEI STREET Revolver Entry Trumps	Trumps Entry	176 177 178 180	176-180
Bennett's Book Barn MLC Insurance - Entry Goldfinch and Cousins Juliet and Speechleys UFS Dispensary Entry 1st Floor	Artisan Valuation New Zealand Entry Goldfinch and Cousins (181-185) ALP Sports UFS Dispensary Entry 1st Floor	181 186 187 187A	181-185 186-187
Hannahs McKenzies Dansby Scott Furnishing	Telecom (189) Scotneys (191-195) Arthur Toye (191-194) Michael Hill Jeweller (195)	195	
Para Rubber Entry - 1st Floor	Park Square Restaurant Entry - 1st Floor	196 197	196-198
Broadlands	Temporary (unnamed shop)		
Bits and Pieces Sheep Skins - Haworths	Cameron Jewellery Sheep Skins - Haworths	199 200	199-200
COLEMAN PLACE			

BROADWAY AVENUE - THE SQUARE TO PRINCESS STREET - NORTH SIDE

THE SQUARE Collinson and Cunningham	Farmers	1-17	
Whitcoulls and Broadway Mall Gerrands Jewellers Brian Bates Chemist	Whitcoulls and Broadway Mall GQ	19-25 27 31	Broadway Mall 19-31
Owen Warnocks	Owen Warnocks	33-37	
Nash Jewellers Little Chef Takeaway Bar State Theatre Tobacconist Record Hunter	Vacant Mango Music	45	Amalgamated Theatres 39-47

1977	1991	Number	Number of Site
Bell's Photography Ltd	Bell's Photography Ltd.	47	
Tisdall's Thomson's Silk Shop	Tisdall's Thomson's Silk Shop	49 51	
Eastern and Central Savings Bank	Trust Bank	53-57	
Entry 1st and 2nd Floors Camera House Coleys Jewellers Regent Theatre Harrod's Fashion Ltd REGENT ARCADE Denis O'Brien Ltd Warners Home Cookery Entry 1st Floor	Entry 1st and 2nd Floors Brats (57) Edwards and Mills (59) Regent Theatre Sun Sing Restaurant Basic Blue Golden Tulip Bakery Entry 1st Floor	59-61 73 75 77	Regent Bldg 59-71 Commerce Bldg 73-77
H.L. Young Ltd	H.L. Young/Paper Plus (79) Fashion Express (79-87) Entry	79-87	
Salvation Army Citadel	Para Rubber (89) Entry	89-93	
E.P. Wix Ltd Entry R.F. Hira and Son Broadway Fisheries	Underground Fashions National Australia Bank	95 95A 97 99	Broadway Bldg 95-99
K.M. Wilson - Jeweller Marguerite Maternity Shop STAFFORD ARCADE Wedding Bells Glen Caves Pharmacy National Bank	K.M. Wilson Jeweller (101) THE LINK/Hide n Chic Glen Caves Pharmacy (109)	101 103 105 107 109 111	Hooper Bldg 101-111
Gear Meat Co.	Davis Meats and Delicatessen	113-115	
Lane and Hill Entry 1st Floor	Lane and Hill Entry 1st Floor	117 119	Lane and Hill 117-119
Bank of New Zealand Air New Zealand R.O.W. to Consolidated Mid City Motels	P.N. Stamp Centre Budget Travel (123) R.O.W. to Consolidated Mid City Motels	121 123-125 127-131	Consolidated Motel 121-131
Steak House Pettigrew Real Estate Broadway Service Station PRINCESS STREET	Vacant Shop The Video Station (139) Vacant Shop Greentown (143)	133 135-139 141-145	133-145

BROADWAY AVENUE - THE SQUARE TO PRINCESS STREET - SOUTH SIDE

THE SQUARE A.N.Z. Bank Site	A.N.Z. Bank	2-14	
Entry - T and G. Bldg Raymonde Fashions Lands Bags Ltd	Cherry's/Entry T. and G. Bldg Just Looking (22) Lands Bags Ltd (22)	16-18 20 22	T. and G. Bldg 16-22

1977	1991	Number	Number of Site
R.O.W.	R.O.W.		
Georgina Brook Ltd Entry to Other Floors A.M.P.	Trumps Sports Entry to other Floors STAX Abode (36)	26 28 30-36	A.M.P 26-36
G.H. Bennett and Co. Ltd	G.H. Bennett and Co. Ltd	38-42	
Bank of N.Z. District Office Hopwood Hardware Co. Ltd Jean's Junction Wrightson's N.M.A. Garden Supplies Avon House Group Rentals David Brown Pharmacy Goldstar Textiles Broadway Books Entry to Rear and 1st Floor Etcetera Garners	Pascoes the Jewellers/ DOWN TOWN Balfour's Downtown Pharmacy Curl up 'N' Dye Robert Harris Central Power The Bazaar Entry House of China Entry - Little Shop/Leader and Watt (86) Hopwoods Mitre 10 (at Rear) Vacant Shop	44 46-52 54 56-58 60 62-64 66 68-70 72 74 76-78 80 82-88	Hopwoods 44-52 54-58 60-70 Progressive Bldg 72-78 Garners 80-88
R.O.W.	R.O.W.		
Farmers Supply Depot Entry 1st Floor	Outdoor Living Supplies Entry 1st Floor	90 92	Berryman Ltd 90-92
King and Teppett Entry 1st Floor The Bike Shop Maisonette	Vacant	94 98 100 102	
Hairport Entry to Rear Dalgety Travel	City Watches (104) Hairport (104) Entry to Rear T and T	104 106-108 110	Coronation Bldg 104-110
Cooper's Shoes Copper Kettle Broadway Handcraft Supplies	Dowsetts Shu Bar	112-116 118	
Exclusive Gowns Entry	Coopers Mens Shoes Entry	122 124	122-124
Christian Literature Crusade Bookshop Entry 1st Floor Scholl Foot Comfort	Christian Literature Crusade Bookshop Entry 1st Floor Casio	126 126A	126-128
Singer Sewing Shop Trans Vision Cantwell's Pharmacy Stamp Centre The Cross Roads Restaurant PRINCESS STREET	Singer Sewing Shop Group Rentals Broadway Handcraft Supplies (144) Tatarua Workwear	130 132 136 138 140	130-140

MAIN STREET - PITT STREET TO THE SQUARE - NORTH SIDE

PITT STREET Vacant Site Main Street Joinery	Lai Wah Restaurant and Takeaway/ Carpark	315-317 319-321	315, 317 319-321
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1977	1991	Number	Number of Site
Senior Citizens Club	Senior Citizens Club	323-325	323-325
R.O.W. To Rear Sections	R.O.W. to Rear Sections	327	327
A.S.C. Flowers	Davis Trading	329-335	329-335
Pancake Place	XL Leathers	337	337
Asia Restaurant	Asia Restaurant	339	339
Haseldens Bike Shop	The Craftsman gallery (343)	341-343	
Entry 1st Floor	Entry 1st Floor	345	
Bruces T.V. and Radio Service	Bruces T.V. and Radio Service	347	
Entry Colin Blumenthal Real Estate Dalecourt Holdings Ltd Calvin Dale Ltd Kiwi Pest Control ANDREW YOUNG STREET Cafe Peking Restaurant Vacant	Electrolux Cafe Peking Restaurant Race Images	349 351- 353	349-353
Manawatu T.V. and Sound Savemore Stylex Drycleaners Bargain Bin T. and M. Hicks Fish and Chips R.O.W. to D.I.C. Central District Playcentre Assn Second Gear Bookshop (Secondhand) Avant Garde Studios Hasledens (Hobbies) Moose's Sports Shop Shopfittings Shopfittings? Gibs Burger Bar Cnr. (New) Shop GEORGE STREET Hire Pool (Musical) Stamps and Coins Dean's Bookshop Vacant Wood and Leather Craft Shop Bargain Lingerie R.O.W.	Foto First Te Rod Pu Hauora garb T. and M. Hicks? Fish and Chips Astoria Car Park Brewcraft Amenities Ltd Tattoo Shop Manawatu Peace Centre Gibs Burger Bar Vacant Car Park " " " " "	363-365 369 371 373 375 377 379 381-383 385-387 389 391 393 395 397 399 401 403 405 407 409	399-409
Commercial Hotel THE SQUARE	Vacant J's Models and Cycles Entry to NZI House NZI Insurance Customer Services Stephen Parson's House of Travel (into The Square)		411-421

MAIN STREET - PITT STREET TO THE SQUARE - SOUTH SIDE

PITT STREET Car Park	Car Park (in Front) Globe Theatre (Behind)		
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1977	1991	Number	Number of Site
Art Gallery Carpark Civic Complex Development	Art Gallery Civic Complex Entry (to Underground Car Park)		
Craigwin Homes Ltd	B.G.F. (Fabrics)	402	
Civic Hair Care Center	The Hair Company	404	
The Wool Den	Vacant	406	
The Little Shop	Vacant	408	
Letitias		408A	
Young Ideas	Bette Ireland Real Estate (410)	410	
THE SQUARE			

MAIN STREET - THE SQUARE TO PRINCESS STREET - NORTH SIDE

THE SQUARE			
Post Office	Temporary Bargain shops/ Post Bank Car Park	423-451	423-451
Hopwoods Hardware Tiffany's Jewellers Elmar Studios Entry 1st Floor R.O.W.	Parking Building Vacant DOWN TOWN Entry Hudson's Sport Centre R.O.W.		453-467
Captain Delicious Stanton Bros Laundrette Remington Office Equipment Entry 1st Floor	Captain Delicious Stanton Bros Stationery Elmar Studios (475) Entry 1st Floor (475)	469 471 473 475 477	469-477
Entry The Guardian (Newspaper) R.O.W. Garners R.O.W.	Entry The Guardian (Newspaper) R.O.W. Hopwoods - Mitre 10 R.O.W.	479 481 483-487	
Post Office Fish Supply Watson Drycleaners	Savell's Sound Centre Alleyway Bargains	489-491 493-497	489-497
Lichfield (N.Z.) Ltd Golden Takeaways Entry Rear and First Floor Trophy Wholesalers Sasha Hairstylists	Golden Restaurant/ Takeaways (505) Alleyway Bargains (507) Watchmaker Perm and Cut Shop	499 501 503 505 507	499-507
Furniture Fair Air New Zealand PRINCESS STREET	Kellys/Athletic Attic R.O.W. Air New Zealand Travel	509-515 517-525	

MAIN STREET - THE SQUARE TO PRINCESS STREET - SOUTH SIDE

THE SQUARE			
Gerald Taylor Library - Newspaper/Entry	Darryl Amy Library - Newspaper/Entry	420 422 424-434	420-434
R.O.W. Court House	Court House		
Public Trust Office	Car Park		

1977	1991	Number	Number of Site
R.O.W. Rowe McBride and Partners	Public Trust Office R.O.W. Smillie, Britten, Larsen and Co. (482-484) Dental Surgery	482-484	
R.O.W. Post Office - New Building	R.O.W. Post Office	486-498	
R.O.W. - Garage at Rear	R.O.W. - Garage at Rear	500	
Bas. Johnson	Bas. Johnson	502-508	
The Sportsman	Watson Drycleaners (510)	510-512	
R.O.W. Bernina Sewing Centre	R.O.W. Bernina Sewing Centre	514-516	
Car Park Empire Hotel	Car Park Empire Hotel	518-520 522-532	518-532
PRINCESS STREET			

CHURCH STREET - THE SQUARE TO PITT STREET - NORTH SIDE

THE SQUARE			
Entry - Stable Restaurant	Vacant		
-Floors Above	The Grand Bookshop	341	
	Entry Floors Above	339	
	The Olde Bailey (341)		335-341
Personality Kitset Centre		337	
Weinkeller	Native Shirts (335)	335	
Car Park	Car Park	327-333	
Museum	Museum	321-325	
Commercial Travellers Club	City Club	315-319	
Auto Parts Man. Ltd	Public Car Park	307-313	
Tingeys	Pedal Pushers	303-305	
Ministry of Agriculture and Fisheries		299-301	
Seed Testing Station	Ministry of Agriculture and Fisheries	295-297	
	Seed Testing Station/		
P.O. District Engineers	P.N.C.C. Community Services	289	
	Directorate		
N.Z. Kart Distributors		287	
Auto Electrician	AGL Garage (283)	283-285	
PITT STREET			

CHURCH STREET - THE SQUARE TO PITT STREET - SOUTH SIDE

THE SQUARE			
All Saints Church	All Saints Church	344-348	
Entry 1st Floor		342	
Justice and Edmonds	Toy Warehouse	338-340	
Manawatu Club	Manawatu Club? (338-340)	334-336	
LINTON STREET			
Martins Garage Ltd	Housing Corporation	326-332	
Car Park	Car Park (for Housing Corporation)	322-324	
House	Church Street Dental Centre	318-320	
House	Joyce Group	314-316	
Theosophical Hall	Theosophical Hall	310-312	
Viscount Print	Computer Village/Viscount Computer	306-308	
	Learning Centre, Electronics (at Rear)		

1977	1991	Number	Number of Sites
Vacant Site Y.W.C.A. Hall Old House Willowbank Dairy Old House Vacant Site PITT STREET	Beaurepairs (300) Professional Court (Various) Old House Champ Takeaway Old House Regent Motors	302-304 300 296-298 292-294 288-290 284-286	

CHURCH STREET - THE SQUARE TO PRINCESS STREET - NORTH SIDE

THE SQUARE Maple Police Station Manawatu Kilwinning Lodge Central Baptist Church Post Office Christian Science Church Farm Products Co-op Ltd PRINCESS STREET	Galvin's Entry 1st Floor Loughnans Notary Public Vacant Westpac (349) Police Station Manawatu Kilwinning Lodge Abbey Theatre Post Office Christian Science Church Brinkleys	343-349 351-361 363-367 369-373 375-381 383-387 389-403	
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CHURCH STREET - THE SQUARE TO PRINCESS STREET - SOUTH SIDE

THE SQUARE Barber P.D.C. - Car Park Fabric Shop Bus Depot - N.Z.Road Services Police Department St. Andrews Church	Entry to Plaza/ The Glitter Shop Entries Warehouse Clothing Business Development Centre (360) Bus Depot - Intercity St. Andrews Church	350 360-362 364 366-368 370-372 374-378	350-364 366-372
ASHLEY STREET Opera House Car Park - Operatic Society	Opera House Car Park - Operatic Society	380-384 386	
Dental Repairs House (at Rear) House Manawatu-Oroua Electric Power Board Car Park	Car Park Central Power Car Park	390 392 394-396 398-400 402-410	390-410
Orient Lodge Hall Power Motors PRINCESS STREET	Orient Lodge Hall Madison Motorcity	412-414 416-418	

COLEMAN PLACE - GEORGE STREET TO THE SQUARE - NORTH SIDE

GEORGE STREET Willie Weavers Third World Shop Gift Shop	Vacant Outreach Inc	1-7 9 11	
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1977	1991	Number	Number of Sites
Entry 1st Floor H and R Block Hallensteins Entry 1st Floor The Athenian Smiths Women's Wear The Scotch Wool Budget Shop Will's Bookshop THE SQUARE	Vacant Entry 1st Floor Vegas Video Games (27) Scotch Wool Shop Entry Vacant	15 17 19-25 27 31A 33	

COLEMAN PLACE - GEORGE STREET TO THE SQUARE - SOUTH SIDE

GEORGE STREET D.I.C. Entry 1st Floor	Vacant Entry 1st Floor	2-6 8	D.I.C. Bldg 2-8
Artisan Craft and Gifts Forget-Me-Not Flowers Heaphy's Bookshop	Vacant Lita's Boutique (12) Nirvana Imports	10-12 14 16	Norfolk House 10-16
Scotch Wool Shop Entry 1st Floor A.N.Z. Bank THE SQUARE	Rollerblade A.N.Z. Bank Entry	18-20	ANZ Bank 18-32

CUBA STREET - CUBA STREET TO MAIN STREET - WEST SIDE

CUBA STREET Ministry of Transport 2ZA and 2YM	Vacant Vacant/ Payless Plastics (30)	2-24 26-30	
Frank Jones Hairdresser Odeon Theatre Colour Photique Studios	The Palm Hair Company Vacant Paddy's The Pawn Broker	32 34-36 38	32-38
Frocks Unlimited The Vista Entry 1st Floor 3 Flats Cakeland Antique Shop	Millwood Gallery (44) The Vista Entry 1st Floor 3 Flats Sandra's Cake Decorating Studio Cactus Designs	40 42 44 46 48	40-48
Flat Above Hall's Office Equipment Seiko Watch Shop The Indoor Garden Entry 1st Floor Tropical Fishland Antique Shop	Flat Above Vacant Omni Rascals Entry 1st floor Cumin Discoveries	48A 50 52 54 56 58 60	50-60
R.O.W.	R.O.W.		
Spectrum Astoria Ballroom Venus Shop	Labels Again Cambridge Bookshop	62 64 66-68	62-68
New Shop 9 New Shop 8 New Shop 7 New Shop 6	Periwinkles (70) Windfall Gallery	70 72 74 76	70-84

1977	1991	Number	Number of Sites
New Shop 5	The Zodiac Coffee Lounge	78	
New Shop 4	Jan's Reflexions Hair Design	80	
New Shop 3	Vacant	82	
New Shop 2	Vacant	84	
Shop 1 fronts to Main Street	Vacant		
MAIN STREET			

GEORGE STREET CUBA STREET TO MAIN STREET - EAST SIDE

CUBA STREET			
Four Aces Restaurant	Halal Curry House	1	
Entry 1st Floor	Entry 1st Floor	3-7	
Cambridge Bookshop	Wyrd	9	
Argons Mart	A1 Rental Appliances (9-11)	11	
Entry 1st Floor	Entry 1st Floor (29A)	15-29	
Willie Weavers	Vacant	31	
COLEMAN PLACE			
D.I.C.	Vacant	33-51	
R.O.W.	R.O.W.		
Watson and Eyre	Car Park	53	
Vacant		55	
Calico Pie		57	
Vacant		61	53-65
Vacant		63	
Ginger's Secondhand Shop		65	
Vacant		67-71	
Vacant		73-77	67-81
Topline Hire Pool		79-81	
MAIN STREET			

CUBA STREET - BOURKE STREET TO RANGITIKEI STREET - NORTH SIDE

BOURKE STREET			
Aero and General Instruments	Vacant	135	
Bev's Brunch Bar	Ray's Takeaways	137	
Sandra's Cake Decorating Studio/	Ray's Lunchbar (137)/	139	
Entry 1st Floor	Entry 1st Floor	139A	135-141
P.J.'s Signs and Designs		141	
The Yarn Barn	The Tile Shop (143-145)	143	
Ken Read - Panelbeater		145	
Mid City Auto Spray	McBain Panel Beaters (147)	145A	
Randwick Wholesalers	Vacant	147	
Ma Cherie Salon		149	
Turnball and Jones	Pro - Stock Developments	151-155	
Berrymans	Vacant (159-161)	157-161	
Bob's shop	Rowlands Electronics Engineers	163	
Flat Above Shop	(165)	165	
CAMPBELL STREET			
Vacant Old Shop	Eastern Takeaways/	167-169	
House	Dong Fong Restaurant	171-173	
Carlton Hotel	Car Park/ Carlton Hotel	175-193	
A. Parkinson - Barber	The Red Lobster	195	

1977	1991	Number	Number of Sites
H. Rowland Ltd G. Sutherland - Washing Machines	Post Office Seafood Specialists Opportunity Shop (St. Vincent de Paul)	197 199	197-201
Harris Meat Market	Harris Meat Market	201	
LOMBARD STREET			
Argosy Reprographics	Trenz (Cycles and Mowers)	203	
St. Vincent de Paul Opportunity Shop		205	
Bookshop	Grandma's Place (Second Hand) (207)	207	
Co-op	Moose's Sports House (211)	209-211	
Ward Bros	Entry 1st Floor		
	Leonards (closed) (213)	213-215	
	Whats n Store		
Hong Kong Restaurant	Entry 1st Floor		217-223
Mandarin Restaurant	Club Londons/ London Park Cafe (217)	217-223	
Motor Accessories Shop	Auto Accessory Centre	225-227	
Open Door Mission	Craigwin Homes	229-231	
TAONUI STREET			
Cosmopolitan Club	Cosmopolitan Club (Bldg only)	233-239	
Cosmopolitan Butcher	Anthony Boutique/ Rice and Spice (243A)	241	
Vacant (Old Cycle Shop)	Entry	243	
	Rent Contact (243B)		
	Cubas (Fun Parlour) (243C)		
Entry 5 Flats	Ridgways (Moving Sale) (245)	245	245-251
	Lock-up (of some sort)		
Dong Fong Restaurant	Entry to Flats (245)		251
	Sizzlers Restaurant	251	
	Vacant		253-279
Selwyn Motors	Lighting King (Closing Down) (279)		
	Vacant	253-279	
	Quick Print Bookshop (279)		
	MAF Tech		281-285
Entry 1st Floor	National Bank Car Park/	281	
Food for thought	National Bank	283	
Ski Shop		285	
National Bank		287-299	287-299
RANGITIKEI STREET			

CUBA STREET - PITT STREET TO RANGITIKEI STREET - SOUTH SIDE

PITT STREET			
Flat	Vacant		142-184
Flat	Civic Communications/		
House	Bridge International (148)		
Old Fire station - 4 letterboxes - 7 letterboxes	Civil Defence House (180)		
Vacant	Cains Stampmaker (188)	186-188	186-190
Entry 1st Floor	Watson Eyre Printers (188)	190	
Hawkeswood Safety Shop	N.Z. Safety Shop	192-196	
ANDREW YOUNG STREET			

1977	1991	Number	Number of Sites
Vacant Petrol Station	Manawatu House (Ministry of Transport)	198	204-246
Car Park	Vacant		
Ministry of Transport	Vacant	246	
GEORGE STREET			
Four Aces Restaurant	Halal Curry House	248	
T. Palenski Hairdresser	SPCA Bargain Shop	250	
Vacant	Vacant	252	
Secondhand Books	Petticoat Lane (Secondhand) (254)	254	258-264
Vacant		256	
Vacant	Workers Unemployed Rights Centre	258	
Ingram's	Tune Inn	260	
Entry 1st Floor	Entry 1st Floor	262	
Sportsnews	Sportsnews	264	
R.O.W.	R.O.W.		270-272
Fruiterer		266	
Joe Sing Photographers	Joe Sing (266)	268	
Coo-ee Drycleaners	Coo-ee Drycleaners	270-272	
Key Cutter	Vacant	274	
Skylight Restaurant	Vacant	276	
Para Rubber	Hawaiian Takeaways (278)		278-282
Entry 1st Floor	Magic Wok (280)	278-280	
	Entry 1st floor	282	
McKenzies	Vacant (284)		286-290
	Arthur Toye Ltd (191-194)		
Hannah's	Scotney's (191-195)	286-290	
Accessway to Flats	Star Second Hand Books (292)	292-294	
	Accessway to Flats	296A	296-298
Urgent Pharmacy	Fox and Firkin	296	
Salon Cynthia	Headline Hairdressers	298	
C.M.L. Arcade	Service Area	300-304	300-320
Shop	Dynasty Takeaways/	306	
Shop	Dynasty Restaurant	310	
Shop		312	
C.M.L. Arcade	Post bank	314-320	
RANGITIKEI STREET			

KING STREET - RANGITIKEI STREET TO PRINCESS STREET - NORTH SIDE

RANGITIKEI STREET			
N.Z. Insurance Co. Ltd.	Armed Forces Recruiting	1-19	
R.O.W.	R.O.W.		
Bill's Trading Post	Vacant	21-23	
M.C. Sexton		25-29	
	Whitcoulls Office Products (31-43)	31-43	
	Shanton		
	Simpson's Hire Suits Ltd (43)		
	Puffs Patisserie (43)		
	The Silver Scissors Hair Shoppe (47)		
	The Drycleaners (49)		
	R.O.W. to Queen Street		
Vacant Building			
R.O.W. to Queen Street		59-65	
Car Park and Old building		67-73	
Ye Olde Curocity Shoppe		75-79	
Vacant Site - Car Park	Car Parks		

1977	1991	Number	Number of Sites
Arlidge Bros	Vacant?	81-89	
Bing Harris Sargood Ltd - 1st Floor	Vacant?		
Agnews	Vacant (95)	95-97	
Dickins Motors	Vacant	99-101	
Car Park	Car Park	103-109	
Arlidge Bros - Flowers	Vacant	111-115	
R.O.W. to Queen Street	R.O.W. to Queen Street		
Car Park			
Old Building Car Park	Old Building Car Park	121	
Parlane and Glasgow	Manawatu Polytechnic Design Centre		
Clifton House	Clifton House	131-139	
Vacant	Red Cross Bargains		
Medical Assurance Society	M. M. Buckley Podiatrist	143	
Entry 1st Floor Flats	Entry 1st Floor Flats	145	
Salvation Army Thrift Shop	Toddle Inn	149	
R.O.W.	R.O.W.		
Technical Institute	Technical Institute	151-189	
PRINCESS STREET			

QUEEN STREET - RANGITIKEI STREET TO PRINCESS STREET - NORTH SIDE

RANGITIKEI STREET			
Harvey's Family Restaurant	Old Flame Restaurant	1-21	
	P.S.I.S.		
P.S.I.S.	Baycorp Holdings (35)	23-41	
	H and R Block (37)		
	Computer Engineering Services (39)		
	Loss Control Management Services (41)		
	Team - Training Education and Management Consult. (43)		
F.C.D.C.	Trilogy Central Districts (43-51)	43-51	
South British Administration Centre		53-59	
Social Welfare Department/	Social Welfare Department	61-63	
Labour Department			53-75
South British Insurance		65-67	
Car Park		69-75	
Kempthorne and Prosser	Car Park/Vacant	77-89	
Barry's Bulk Food Barn	Vacant	91-99	
Car Park	Car Park	101-113	
Open Brethren Church	Open Brethren Church	115-121	
R.O.W.	R.O.W.		
Provident Life Insurance	N.Z. Wool Board/Federated Farmers	123-131	
Dawicks Services Ltd	Farmers Mutual Group Computer Centre	133-143	
House	Northcote Inn Coffee Shop/	145-149	
House	Northcote Office Park	151-157	
House	Alcohol and Drug Centre (159)	159-167	
Jolly and Mills Ltd	Jolly and Mills Ltd	169-187	
PRINCESS STREET			

1977	1991	Number	Number of Sites
RANGITIKEI STREET Nicholls Real Estate Government Life Entry Toddle Inn Entry - New Zealand Forest Service	Pip Emmas Tower - Entry K9 Advertising Entry - D.O.C.	2 4 6 8-10	2-18
National Provident Fund Vacant R.O.W. Car Park	Vacant Dominion Paper (Wellington Newspapers) R.O.W. Car Park	20 22	20-26
Avis Rental Cars D.A.C. R.O.W. and Car Park	R.N.Z. Foundation for the Blind (28) Vacant (34) Department of Social Welfare Car park in front, offices at Rear	28-34 36-54	
Motor Specialities Ltd Motor Specialities Ltd	Manawatu - Wanganui Area Health Board- Public Health Unit (68) Department of Survey and Land Information (56-70)	56 70	56-70
Arlidge Bros Ltd	Vacant	78-84	
Car park and Rear Entrance to Agnews Ace Traders R.O.W. Car Park Farmers Mutual Insurance Co. Ltd	Car Park and Entrance to Stuarts Joinery Club 100 R.O.W. Car Park Fletcher	86-98 100-114 116-136 138-146	
Building Centre P.N. Technical Institute PRINCESS STREET	Building Centre P.N. Technical Institute	148-156 158-180	148-180

GREY STREET - PRINCESS STREET TO RANGITIKEI STREET - SOUTH SIDE

PRINCESS STREET Jolly and Mills Northcote Trust Hospital Vacant Site R.O.W. Plantmarket Dairy Vacant R.O.W. to Car Park Data Bank Old House Vacant Site Infrapulse Distributors Ltd 1st Floor Entry Rear of F.C.D.C. P.S.I.S. J. York and Co.	Jolly and Mills Northcote Office Park R.O.W. Scott Installation (68) Baker Electronics (Unit 2 68) Livingstones Business Equipment Model Tech. Ministry of Forestry R.O.W. to Car Park Data Bank Systems Ltd. Advantage Computers Hertz Rent-A-Car Pacific Sauna Car Park and Rear of D.S.W. Rear of Trilogy Rear of P.S.I.S./Baycorp Holdings/ H and R Block/ Computer Engineering Services/Loss Control Management Iennian Homes	96-109 76-94 72-74 68-70 66 62-64 50-60 46-48 42-44 38-40 34-36 28-32 22-26 20	
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1977	1991	Number	Number of Sites
Flat 1 - upstairs Flat 2 - Rear of Bldg	Flat 1 - upstairs Flat 2 - Rear of Bldg	20 Flat 1 20 Flat 2	
Car park L.W. Goodman - Solicitor Phoenix Assurance Housing Corporation RANGITIKEI STREET	Car Park Vacant Sun Alliance House (2-18) A.N.Z. Bank	12	2-18

ANDREW YOUNG STREET - CUBA STREET TO MAIN STREET - WEST SIDE

CUBA STREET			
Hawkeswood Safety Ltd	N.Z. Safety Shop	2-6	
Beattie and Horne	Beattie and Horne	8	
Standard Optical Company of Australasia Ltd	Vacant	10-12	
Tackle	C.A. Willis	14-16	
	Dominion Coachlines Ltd (18)	18-22	
	Keeling and Mundy Printers (20-22)		
House	Vacant	24	
House	House	26	
Para Rubber	? (No Identification)	28	
Manawatu T.V. and Sound	Manawatu Motorcycles (32)	32	
Central Hotel Building	Central Electrical (32)		
MAIN STREET	Electrolux	34-36	

ANDREW YOUNG STREET - CUBA STREET TO MAIN STREET - EAST SIDE

CUBA STREET			
Old Garage	Manawatu House (M.O.T.)	1-5	
Car Park	Car Park	7-15	
Odeon Theatre Rear Access	Astoria Car Park	17	
E.S. Quicke and Sons		19	
Rebecca Lodge	Rebecca Lodge	21-23	
R.O.W.	R.O.W. (Closed Off)		
House	House	25	
H.R. Farquar and Assoc.	Meridan House	27	
Ayrshire Cattle Breeders Association of N.Z.	Ayrshire Cattle Breeders Association of N.Z.	29	
Cafe Peking Restaurant	Cafe Peking Restaurant	31-33	
MAIN STREET			

TAONUI STREET - GREY STREET TO CUBA STREET - WEST SIDE

GREY STREET			
Ariki Kawasaki Shop	Bargain Clothing (No Name)	76	
Car Park		78	
Tim Gibbs Yamaha	Anza Motorcycles (and Yard)	80-96	
Cosmopolitan Club		98-110	
R.O.W. to Vacant Section	Vacant	112	
Vacant	The Hair Market (116)	114-116	
R.O.W. to L.R. Cutter Plumber	R.O.W. to Manawatu Precision Electronics	118	
Swiftcopy Centre	Access Teachers Manawatu (122)	120-122	
Vacant	Vacant (126)	124	

1977	1991	Number	Number of Sites
Open Door Mission CUBA STREET	Craigwin Homes	126-130	

TAONUI STREET - GREY STREET TO CUBA STREET- EAST SIDE

GREY STREET			
Car Park	Car Park	81	
Barraud and Abraham	?	83-105	
Car Park and Rear Entrance to Barraud and Abraham	Car Park and Rear Entrance to ?	107-113	
Barraud and Abraham Wines and Spirits	New Body Fitness Centre	115-119	
R.O.W. to Dalgety	R.O.W.		
P.O. Savings Bank District Promotion Offices	Vacant	121-123	
Cosmopolitan Club	Entry 1st floor	125-135	
CUBA STREET	Anthony Boutique (Corner)		

LOMBARD STREET - GREY STREET TO CUBA STREET - EAST SIDE

GREY STREET			
Winstones Store		67	
Winstones Shop and Office	Placemakers Yard	69	
The Tile Centre	Placemakers Shop and Office (69-81)	71	
Vacant		73	
Vacant		75-79	
Vacant		81-83?	
Ward Bros (P.N.) Ltd	Needlecraft Distributors	85	
P.N. Jaycee Inc.	E.W. Transmission Specialists (Back Section) Two wheels Engineering		
Entry 1st Floor	A.D.L. Adhesive Distributors Ltd		
Argosy Photocopiers	Entry 1st Floor	89	
CUBA STREET	Trenz (Cycles and Mowers)		

LOMBARD STREET - GREY STREET TO CUBA STREET - WEST SIDE

GREY STREET			
House	Tile Centre	70	
Flat	Murphy and England Auto Electrical	72	
House	Ocean Fisheries	74	
Coppers Transport	Stomach (Musical Centre)	76	
Metalock N.Z. Ltd	Davis Trading Co. Ltd	78	
Northern Veterinary Supplies		80	
Loyal Orange Institution	Car Park	82	
Bonny Products Ltd	Vacant	84	
Carlton Bottle Store	Central Bottle Bar	86-88	
Harris Meat Market	Harris Meat Market	90-92	
CUBA STREET			

CAMPBELL STREET - GREY STREET TO CUBA STREET - EAST SIDE

109

1977	1991	Number	Number of Sites
GREY STREET			
Old House Store		71	
Ispray	Neeco National Electric	73	
Jenkinson Panelbeaters		75	
House	Ansett Airfreight/Couriers (79)		
G.E.C. N.Z. Ltd	G.E.C. (N.Z.) Ltd (83)	81	
	Tableau Tow-Bar (83)	83	
Offset Publications	Auto Electrical Supplies Ltd (91)	87-91	
Q.E. College Old Boys R.F.C.	Q.E. College Old Boys R.F.C.	93	
Bonny Products	Vacant	95	
House	Car Park	97-99	
Flat	Eastern Takeaways/	101	
Vacant	Dong Fong Restaurant	103	
CUBA STREET			

CAMPBELL STREET - GREY STREET TO CUBA STREET - WEST SIDE

GREY STREET			
House	Sport and Fitness Centre	74	
House		76	
House	John Bates Wheel Alignment Ltd	78	
House	(78-80)	80	
Vacant Site	Car Park	82	
House		84	
House	Car Park	86	
House		88	
House	Heatrite Bathroom Centre (90)	90	
House	House	92	
House	House	94	
House	House	96	
Savage Club	Savage Club	98	
Bob's Shop	Rowland's Electronic Engineers	100-102?	
CUBA STREET			

LINTON STREET - FERGUSON STREET TO CHURCH STREET - WEST SIDE

FERGUSON STREET			
House	House	38-40	
House	House	36	
House	House	34-34A	
Officers Club	Officers Club?	30-32	
House	House	28-28A	
Central Motel	Central Motel	26	
P.N. Bowling Club	P.N. Bowling Club	24	
Squash Club	Squash Club	22	
House	House	20	
House	House	18	
House	House	14-16	
House	House	10-12	
National Party	Linton House - Medical Assurance Society/Architect Firm	6-8	
Martins Garage Ltd	Housing Corporation	2-4	
CHURCH STREET			

1977	1991	Number	Number of Sites
FERGUSON STREET			
Contract Bridge Club	Contract Bridge Club	37-41	
House	House	33-35	
House	Entry/Exit Pak' n Save Car Park	29-31	
House	Vacant Shop (17-27)	25-27	
House - P.N.C.C. Health Dept.		21-23	
House - P.N.C.C. Electricity Dept		17-19	
R.O.W. - Justice and Edmonds and P.N.C.C.			
Manawatu Club	Toy Warehouse Car Park	1-15	
	Manawatu Club?		
CHURCH STREET			

FITZHERBERT AVENUE - THE SQUARE TO FERGUSON STREET

THE SQUARE			
B.N.Z. Bank	B.N.Z. Bank	1-5	
National Mutual Insurance and Entry to other Floors	National Mutual Insurance and Entry to other Floors (7-21A)	7-21	
Jeweller		21A	1-25
Alcazar Coffee Lounge	Alcazar Coffee Lounge	23	
Kiwi Book Shop	Kiwi Book Shop	25	
Alexander Clark Ltd	Fitzherbert Market	27-37	
R.O.W.	R.O.W.		
P.D.C.		39-43	
Majestic Hotel		45-57	
R.O.W.			
P.D.C. Cycles		59-63	
Vacant Building		65-73	
Car Park			
Co-op Wholesale Liquor	Liquorland	75-79	
Burgess Hardware	Entrance/Exit Plaza Car Park	81-87	
Co-op Supersave	Car Park (Warehouse at Rear)/ Movie World	89-99	
FERGUSON STREET			

FITZHERBERT AVENUE - THE SQUARE TO FERGUSON STREET - WEST SIDE

THE SQUARE			
Vacant Site	Trust Bank Central/ 1st Floor Entry/ Star Travel	2-12	2-12
Central Service Station	Central Service Station	14-24	14-24
Jersey Lane R.O.W.	Jersey Lane R.O.W.		
Watt Engineering Ltd	Watt Engineering	26A	
Bruce Watt Photography	Bruce Watt Photography	26-30	
H.I. Dimock Ltd	Martin's radio electrical service	32	
R.Paddy - Barber	Atlantic and Pacific Holiday Shop	34	
Majestic Beauty Salon	Sunrise SnackBar	36	
The Bistro	The Cork and Fork	38-40	
P.N.C.C. -Old House		42-44	
P.N.C.C. - Old House	Car Park	46-50	
P.N.C.C. - Reserves Dept. etc.		52-58	
Livestock Improvement Association	Car Park	60-66	
Stylex Print Ltd	Vacant	68-72	
R.O.W.	R.O.W.	74-76	

1977	1991	Number	Number of Sites
T.A.B. Takeaway Bar Avenue Motors Woodhams Service Station FERGUSON STREET	T.A.B. Resene Color Shop (82) Midway Carpets (82-84)/ Taj Mahal Restaurant Firestone Tyre Centre	78 80 82-94 96-100	

ASHLEY STREET - CHURCH STREET TO FERGUSON STREET - WEST SIDE

CHURCH STREET St. Andrews Church and Hall Bus Depot Accessway House House House House Storage - House Mauri Engineering FERGUSON STREET	St. Andrews Church and Hall (2-20) Plaza Car Park (22-30) Service Entrance/ Staff Car Park for Foodtown (Foodtown at Rear) (32-66) Plaza Car Park (approx. 68-82)	2-6 8-30 32-40 42-46 48 50 52-56 58-82	
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ASHLEY STREET - CHURCH STREET TO FERGUSON STREET - EAST SIDE

CHURCH STREET Opera House Car Park CROSS STREET Lintotype Service (P.N.) Ltd Car Park The Farmacy FERGUSON STREET	Opera House Car Park Inland Revenue Department (41-63)	1-17 19-39 41-47 49-55 57-63	
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CROSS STREET - ASHLEY STREET TO DONNINGTON STREET - NORTH SIDE

ASHLEY STREET Car Park DONNINGTON STREET	Car Park	1-7	
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CROSS STREET - ASHLEY STREET TO DONNINGTON STREET - SOUTH SIDE

ASHLEY STREET Lintotype Service P.N. Ltd Business and Industry Cleaners and Rotobic Manufacturing Ltd House DONNINGTON STREET	Inland Revenue Department	2-4 6 8	
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DONNINGTON STREET - FERGUSON STREET TO END - WEST SIDE

FERGUSON STREET House fronting Donnington Street Vacant - Old Shed House CROSS STREET	Inland Revenue Department	16-18 14 10-12	
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DONNINGTON STREET - FERGUSON STREET TO END - WEST SIDE (cont'd)

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1977	1991	Number	Number of Sites
Car Park	Car Park	6-8	
Manawatu-Wanganui Rural Trading Co.	R.F. Pitcher and Son	4	
Ken Read Panelbeaters	Dene Stephenson Autos	2	
Tool and Cutter Grinding Services	Tool and Cutter Grinding Services	2	
Crown Houses Ltd	Culling Commercials	2	
R.M. Gray - Panelbeater		2	

DONNINGTON STREET - FERGUSON STREET TO END - EAST SIDE

FERGUSON STREET			
Co-op Honda	Co-op Honda	17-19	
N.Z. Towel Services (Man.) Ltd	N.Z. Towel Services (Man.) Ltd	9-15	
Car Park	Car Park	7	
House	House (Sweetmaker)	5	
R.F. Pitcher and Son Ltd	R.F. Pitcher and Son Ltd	3	
House	House	1	

BOURKE STREET - GREY STREET TO CUBA STREET - EAST SIDE

GREY STREET			
Vacant	Vacant (Section)	65	
House		67-69	
House	John Bates Truck Alignment	71?	
Vacant Section	Data Tronics	73	
House	Cowley Refrigeration	75-77	
House	Heatrite Heating Centre	79	
Dace Auto-Electrical	Vacant	81	
1st Floor Vacant	1st Floor - Human Movements	83A	
	Fitness Centre		
Post Office		83	
Graham Diffey Refrigeration	Sapphire (Billiard and Pool Tables)	85	
Aero and General Instruments Ltd	Vacant	85A	
CUBA STREET			

PITT STREET - CHURCH STREET TO FERGUSON STREET - EAST SIDE

CHURCH STREET			
Vacant	Regent Motors	3	1-3
House	Car Park (N.Z.D.R.I. Bldg at Rear)	7	
House		9	
House	House	11	
House	House	15	
Vacant	House	17	
House	House	19	
House	House	23	
New Unit at Rear	Unit at Rear	25	
New Unit at Front	Unit at Front	25A	
House	House	29	
House	House	31	
House	House	33	
House	House	35	
House	House	37	
House on small site	House on small site	39	
House	House	41-43	
FERGUSON STREET			

1977	1991	Number	Number of Sites
PITT STREET			
House	House	281-283	
House	House	285	
House	House	287	
House		289	
House	Vacant Sections	291	
Shop and House	Shop and House	293-295	
House	P.N.B.C. Parking	297	
Labour Party Rooms	Labour Party Rooms	299	
Flats 1-6	Flats 1-6	303	
Flats 1-7	Flats 1-7	305	
2 Units	2 Units	309 & 309A	
House	House	311-313	
LINTON STREET			
P.N. Contract Bridge Club	P.N. Contract Bridge Club	315-317	
Car Park - P.N.C.C.		319-321	
House		323-327	
Burns Philip Ltd	Car park (in Front)/ Pak' n Save (at Rear)	329-331	
R.O.W.		333	
Electrolux Ltd	Vacant	335	
London Ltd	Lawnboys	337-341	
Peck J.A. and Son		343	
Citroen Distributors	Knit n Save	345	
Woodhams Service Station Ltd	Tsao Chow Takeaway	347-351	
	Firestone Tyre Factory		
FITZHERBERT AVENUE			
Supersave	The Baby Factory	353-363	
Car Park		369-379	
Smith and Walding		381	
Golden Gate Fish Shop	Plaza Car Park (in Front)/ Plaza and Foodtown (at Rear) (365-395)	383	
Jolly Wally's Fish and Chips		385	
Mauri Bros		387-395	
ASHLEY STREET			
The Farmacy	Inland Revenue Department	397-399	
Flat fronting Ferguson Street	(397-401)	401	
DONNINGTON STREET			
Co-op Honda	Co-op Honda	403-407	
Co-op Service Station	B.P. Service Station	409-417	
PRINCESS STREET			

PRINCESS STREET - GREY STREET TO FERGUSON STREET - WEST SIDE

GREY STREET			
Jolly and Mills - Used Cars/Petrol Station/Showroom	Jolly and Mills - Used Cars/Petrol Station/Showroom	2-16	2-16
QUEEN STREET			
Technical Institute	Technical Institute	18-32	
KING STREET			
Technical Institute	Technical Institute	34-36	
Regent Motors	Regent Motors	38	
Pike's Garage	Food Affaire Cafe	40	
Broadway Service Station	Wilson Watson Real Estate	42-48	

1977	1991	Number	Number of Sites
BROADWAY AVENUE Crossroads Restaurant Tatarua Workwear (2 Shops) Westerns Savings Centre Princeway Butchery Fashion Spot Princeway Cake Kitchen A.G.C. Finance	Tatarua Workwear Ansett New Zealand Travel Shop Dressing Room 2 Hair Design Fat Boy's Takeaway Out to Lunch Post Haste Couriers	50 52-52A? 54 56 56A 58 60	50-60
R.O.W. to Scottish Society R.O.W. Upper Crust Entry - Post Office Vacant Gallery Ten F.W. Liley Ltd Entry - 1st Floor Air New Zealand	R.O.W. to Scottish Society R.O.W. Upper Crust Henderson Associates Ltd Gallery Ten Active Microbyte Corn Rigs Health Foods Air New Zealand	60A 62 64 66 68 70 70A 72	
MAIN STREET Empire Hotel R.O.W. Bottle Store	Empire Hotel R.O.W.	74-82 84	74-84
Farm Products CHURCH STREET Used Car Yard Vacant Building Dodunski Auto Services R.O.W. Photo Engravers Everest Knitting Mills Alexander Clark Vacant Site Ferguson Hall	Brinkleys Used Car Yard Vacant Building Dodunski Safety Centre R.O.W. Photo Engravers (Upstairs) Vacant Winstone Glass Monarch Motors Walker and Donald Laminates	86-96 98-102 104-106 108 110 112 114 116-122 124-126 128-130	
Telex House - Ground -First Floor	Ministry of Transport	132-134 136-138	132-138
Davis Smallgoods Ltd Garage Manawatu Auto Screens Princeway Panel Shop	Vacant Farmland Meat Co. Ltd Manawatu Auto Screens Princeway Panel Beaters	140 144 146-148 150	
Car Park P.D.C. Service Station FERGUSON STREET	B.P. Service Station	152-168	152-168

RANGITIKEI STREET - THE SQUARE TO GREY STREET - WEST SIDE

THE SQUARE C.M.L. Arcade Vacant Shop Cadeau Souvenirs Frankies Hairdresser Sports Gear Darryl Amy Shoes C.M.L. Arcade CUBA STREET	C.M.L. Arcade - Trumps Entrance Genies Langwoods Entry Moxon Jewellers C.M.L. Arcade - Post Bank	1-5 7 9 15 17 21 23-25	1-25
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1977	1991	Number	Number of Sites
National Bank Entry 1st-3rd Floors		27-29 31	27-31
California Tea and Coffee Entry Astrological Advice	National Bank	33 35 37	
Property Shop Digital Watch Shop Bean Chair Shop Entry 1st Floor Selwyn Motors	Meechway Shoe Repairs Vacant AJs Cafe Entry 1st Floor Central Traders	39 43 45 49-51?	39-51
Dalgety (N.Z.) Ltd R.O.W. Old Building (No Shops)	Vacant	53-59? 61-63	
General Machinery Entry 1st Floor Andrew's Antiques Star Leather Goods	State Insurance (61-83)	65 67 69 71 73 75	65-75
R.O.W. State Insurance National Insurance Barraud and Abraham	R.O.W. National Insurance Home Help Services	 77-83 85-91 93-97?	
Entry Jim Owen Menswear Peter Cain Studios Pedal Pushers Bike Shop GREY STREET	Clothing Shop Graham Lloyd Real Estate	99 101 103 105	99-105

RANGITIKEI STREET - GREY STREET TO FEATHERSTON STREET - WEST SIDE

GREY STREET Keeling and Mundy Entry 1st Floor Radfords Radio	JoceLyns	107 107A 109	
Hairdresser - J. Baker Hodder and Tolley Real Estate Entry R.O.W. Andrews Mart	National Manawatu Electorate Office R.O.W. World Gym	113 117-119 125 127	
Entry Armstrong and Springhall Domtrac Equipment Ltd	Entry Furniture Fair Pine and Kitset Shop	129 131 133-135	129-131
R.O.W. - W.T. Campbell Book Nook Bargin Bin Entry 1st Floor Vacant Vacant	R.O.W. - Autoz Paints Customs Clearance Entry 1st Floor Wallpaper Warehouse (145)	137 139 141 143 145 145A	137-145
Entry 1st Floor Keith Nicholl Flooring	Entry 1st Floor Bargain Appliances	147 149-151	147-151
Leader and Watt	McCrae's Home Healthcare (153) Leader and Watt (157-165)	153-165	

1977	1991	Number	Number of Sites
Hay and Watson Dansby Scott	Chadwicks Big Save Furniture	167-173 175-181	
R.O.W. M.S. Martin Vacant Vacant Barry Walker Motors MAIRE STREET Rama Bros Entry 1st Floor The Lunch Box ? Products	R.O.W. 2nd Hand Gear (187)/Piano Services Musicks Bond's Bike Shop The Tyre Shop Vacant Entry 1st Floor The Lunch Box Fabric World	183 187? 189 191 193-199 201 203 205-207 209-213	183-199 201-213
? Motors Taylor Drycleaning	Mike Moore autos Ltd (217) Taylor Drycleaning	215-219 221-225	215-225
? Buy R.O.W.	The Frame Shop R.O.W.	227 229-231	227-231
Industrial Distributors Moller Motors	The Carpet Centre Moller Motors	233-237 239-245	
Woolworths FEATHERSTON STREET	Woolworths	247-271	247-271

RANGITIKEI STREET - FEATHERSTON STREET TO TREMAINE AVENUE - WEST SIDE

FEATHERSTON STREET Family Hotel P.N.T.I. Automotive Engineer Wrightson's New to Used Cars BERESFORD STREET Princess Motor Sales N.Z. Plumbers Merchants	Palmerstons Manawatu Toyota Plumbing World (309-311)	273-279 281-283 285-305 307 309-311	
Summit Products Agriculture Chemicals ARGYLE AVENUE 2 Storey Flats Jolly and Mills Used Cars Five Star Motors HAVILL STREET Arthur Sayer Motors Ltd Motor Centre Marine Rangitikei Mini Market GUY AVENUE Flats 2 Storey Flats and Units Moller Motors Landrovers Barry Fitzgerald Motors MIRO AVENUE Auto Court - Used Cars Camper Village K.S. Grant Motors R.O.W. to Rear site N.Z. Motor Corp - Used Cars MATIPO STREET	Beaurepairs 2 Storey Flats Jolly and Mills Light Commercial Five Star Motors Power European (339-351) Rangitikei Mini Market Beazley Homes Andre Blenkiron Motors Arnold Davis Motors Rush Hire Michael Grant Motors R.O.W. to Rear site C.R. Kinniburgh	313-319 321-323 325-327 329-337 339-323 325-327 349-351 353 355-359 361-363 365-367 369-371 373-375 377-389 391-393 395-401	313-319

1977	1991	Number	Number of Sites
Fish 'N' Chips House House House House	Bryan Bate Motors Kennedy Commercials/ Tim Jolly Commercials (407-413)	403 405 407 409 411	
TREMAINE AVENUE			

RANGITIKEI STREET - THE SQUARE TO GREY STREET - EAST SIDE

THE SQUARE B.N.Z. Entry 1st Floor	B.N.Z. Entry 1st Floor	2-10 12-16	2-16
Entry 1st Floor Countrywide Building Society Entry	Entry 1st Floor Westpac (18) Entry	18 20 20A	18-20
Bank of New South Wales Entry - 1st and 2nd Floors	Entry 1st and 2nd Floors	22-24 26	22-26
Commercial Union Arcade KING STREET N.Z. Insurance Co Ltd Royal Tavern R.O.W.	Commercial Union Arcade Armed Forces Recruiting The New Royal R.O.W.	28-36 38-42 44-54	28-36
C.M. Banks Ltd Entry 1st Floor	Vacant Entry 1st Floor	56-58 60	56-60
Dri Copy N.Z. Ltd C.M. Banks Ltd Imperial News Agency Nicholls Real Estate QUEEN STREET Harvey's Restaurant Entry	Vacant Vacant The Book Barrow Pip Emmas Old Flame Restaurant Entry	62 64 66 68-70 72-74 76	62-70 72-76
C.B.A. Bank	The Gingerbread House (Secondhand Children's Gear)	78-82	
M.A. Dixon Accountant Rodgers and Caskie R.O.W. A.B.M. Service Co.	Vacant Vacant R.O.W. Vacant	84 86 88	84-88
Vacant Vacant Vacant	Vacant Vacant Vacant	90 92 94	90-94
A.N.Z. Bank GREY STREET	A.N.Z. Bank	96-102	

RANGITIKEI STREET - GREY STREET TO FEATHERSTON STREET - EAST SIDE

GREY STREET Wrightson N.M.A.	Wrightson N.M.A.	104-108	
Birnie Coombs and Wilson Entry 1st Floor R.O.W.	Post Office Union Inc Entry 1st Floor R.O.W.	110 112	110-112

1977	1991	Number	Number of Sites
Royal Insurance Sun Alliance and London	Royal Insurance Scarpers	114-118 120-124	114-124
Used Car Yard Porter Motors	Porter Shopping Centre and Car Park/ David Reid Electronics (148)	126-150	126-150
Furniture Services Old Leader and Watt Building Selwyn Motors R.O.W. Firestone Tyre Services	Vacant/ Sharland Flooring (152) Protector Safety (156)/ Phil. Turnball Motor Cycles (160) Selwyn Motors R.O.W.	152-154 156-166 168-190 192-208	
Entry 1st Floor David Reid Electronics Ltd	Entry 1st Floor Sheepskin Specialities	210 212-214	
Falcon Rainwear R.O.W.	Horse Talks R.O.W.	216	
Odlins Ltd Odlins Ltd	Andrews Furnishers Classic Ceramics (248)	228-248	228-248
R.O.W.	R.O.W.	250	
Moller Motors Moller Motors	Noel Leeming Budget Rental A Car	252-256 258-262	252-262
Bank of New Zealand N.Z. Post Office Vacant	Bank of New Zealand (266) Vacant Vacant	264 266 272	264-280?
Granny's Cake Kitchen Blue Marlin Fish and Chips Nimble Fingers Staits T.V. Service FEATHERSTON STREET	Hair Counsel Mayflower Takeaways Marias Nail and Beauty Boutique Staits T.V. Service	274 276 278 280	274-280

Appendix B.

SHOP TYPE	1977	1991
Variety/Department	7	3
Electrical Appliances	8	10
Jeweller/Watch	13	15
Butchery	6	1
Men's Clothes	9	7
Furniture/Carpet	8	8
Pharmacy	10	6
Cake	8	2
Bottle Store/Hotel	9	5
Delicatessen	1	1
Gas	1	1
Piano Services	1	1
Restaurant/Takeaway	33	51
Green Grocery	6	1
Paint/Wallpaper	3	2
Book/News Agent	15	11
Uniform	1	1
Material/Wool	10	8
Health Foods	2	2
Hardware	5	4
Plumbing/Bathroom	3	2
Supermarket	4	3
Photography	5	5
Shoes	8	8
Toys	2	2
Women's Clothes	12	13
Manchester	1	2
Lingerie	2	0
Foam Rubber	2	2
Souvenirs	2	2
Tobacconist	1	0
Records	2	2
China	1	1
Lighting	1	1
Fish	3	1
Maternity	1	0
Wedding	1	1
Petrol/Oil	7	4
Bags	2	3
Unisex Clothes	1	6
Farmers' Supplies	6	1
Garden Supplies	3	0
Cycles	3	4
Handcraft	3	4
Stamps/Coins	2	1
Second Hand	6	11
Sports	4	4
Hobbies	1	0
Shopfittings	1	0
Craft	4	7
Wholesaler	6	2
Leather	1	1
Electrolux	1	1
Race Images	0	1
Brewcraft	0	1
Children's Clothes	1	2
Office Equip/Stationery	3	2

Trophy Wholesaler	1	0
Kitset	1	1
Kart Distributor	1	0
Dairy	4	2
Cars/Vehicles	27	27
Trade Aid	1	1
Gifts	1	3
Flowers	1	2
Antique	3	0
Pets	1	0
Mart	2	0
Machinery	2	0
Washing Machines	1	0
Motor Accessories	4	7
Safety	1	2
Trading Post	1	0
Framers	1	1
Mirrors	1	0
Workwear/Rainwear	2	1
Kitchenware	1	2
Marine Motors	1	0
Camping	1	1
Locks	0	1
Phone	0	1
Bargains	1	2
Computers	0	3
Rollerblade	0	1
Plastics	0	1
Overseas Food	0	1
Heating	0	1
Mowers	0	1
Ceramics	0	1