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RETAIL CHANGE IN SOUTHERN SYDNEY: LIFESTYLE-LINKED RESTRUCTURING?

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Retail Change in Southern Sydney: Lifestyle-linked Restructuring?

ABSTRACT *Examination of the changing composition of shopping centres in suburban Sydney between 1969 and 1998 suggests that retail restructuring is linked to lifestyle changes. The growth in the number of shops appears to have matched population growth in the 1990s, suggesting that the suburbanisation of retailing has stabilised. At the same time there has been increasing diversification in terms of the retail functions which are available and in terms of the places where these are available. These changes appear linked to a blurring of the distinction between shopping and leisure and to the use of shopping as a way of signifying identity.*

KEY WORDS: *retailing; shopping centre; consumer behaviour; lifestyle; leisure; Sydney*

Introduction

For many years, research on urban retail provision has focussed on the physical size and location and retail clusters (Greene and Pick, 2006). From a theoretical perspective, attention has been directed to either predicting trade areas on the basis of gravity models of one sort or another (Huff and Black, 1997) or to identifying regularities and hierarchies in shopping centre provision such as those predicted by central place theory. Clearly, central business districts (CBDs) dominate such hierarchies when viewed from a city-wide perspective. In suburbia, the picture is less clear. Variations in population density and socio-economic status both affect the number and type of shopping centres that are present. Lines of communication are also important, with suburban shopping centres often growing around railway stations and ribbon development appearing along highway corridors. In other places, specialised shopping centres develop around such themes as eating and entertainment. Hierarchies are often discerned for both nucleated centres and ribbon developments (Pacione, 2005). Such complexity has led to suggestions that existing theory is of limited utility (Walmsley and Weinand, 1990).

Alongside this work on retail spatial structure has been a focus on retailing from a cultural as distinct from an economic perspective. The emphasis here is on shopping as a form on consumption and on the ways in which this activity prompts the development of a variety of retail forms. In recent years, much has been written about "shopertainment" and the way in which retailing is not so much about satisfying basic needs as about providing venues for social activity (Pacione, 2005, p. 241). Thus, planned shopping malls characteristically provide leisure facilities and novel consumption spaces. Specialised retail precincts have arisen where the emphasis is not on attracting particular tenants (eg chain stores) so much as on providing satisfying experiences for an often up-market clientele (Wrigley and Lowe, 2002).

Urban retail provision is always in a state of flux as shops come and go and as new forms of retailing emerge. Both economic and cultural perspectives are necessary in order to understand such change. There is as yet no clear theoretical view on what is driving contemporary change, a situation that is perhaps not surprising given that the nature of change is often poorly described. This article seeks to rectify this situation by examining the nature of change in the retail spatial structure in a suburban area of Australia's largest city where retail provision has been monitored for thirty years. It also discusses the extent to which these changes might be linked to social and cultural changes generally.

The changing nature of suburban retail provision

Changes in retail spatial structure represent the physical manifestation of changes that are occurring within the retail industry itself and societal and cultural changes more broadly. The main characteristics of retail industry change in advanced western economies are well known (Pacione, 2005) and have been summarised by Walmsley and Weinand (1991). Above all, they include the suburbanisation of consumption. Forster (2004, p.18), for instance, has shown how retailers chased their customers to the suburbs as cities sprawled. Also important have been the concentration of ownership; the growth in popularity and ubiquity of planned shopping malls (often based on investment by superannuation funds); the rise of superstores, hypermarkets and retail warehouses, sometimes located in retail parks; the emergence of own-brand retailing; niche marketing; the growth of category killers (stores with a huge selection of merchandise in a relatively narrow range, lowly priced so as to "kill off" competitors); scrambled merchandising; the extension of trading hours; the revitalisation of "High Streets"; and the application of advances in telecommunications, especially in EFTPOS and stock control (Wrigley, 1988; Cardew, 1989; Cardew & Simons, 1982). E-commerce is also of growing significance although it is as yet restricted to about 2% of total sales in Europe and 3% in the USA (Pacione, 2005, p. 243). More recent times have seen the emergence of "power centres" in the USA. These are agglomerations of big box retailers, often including category killers and warehouse outlets (Hahn, 2000). Changes in society and their impact on the size and distribution of shopping centres have also been well documented. These changes include: demographic change (both the size of the population and its age structure); increasing disposable incomes; the increased availability of motor vehicles and decreased real costs of running cars, until recently at least; the increased availability of credit; changes in the useage of domestic space (especially improved storage with the widespread availability of freezers) and resultant changes in the frequency of shopping; and the increased participation of females in the paid labour force (a fact which is particularly important given the gendered nature of much shopping) (Walmsley & Weinand, 1991).

On top of these social changes, some authorities argue that shopping behaviour reflects cultural change (Underhill, 1999, p. 240). Two cultural changes are particularly important in this regard: the blurring of the distinction between shopping on the one hand and recreation and leisure on the other; and the heightened importance of shopping as a way of developing and projecting personal identity and thus making a statement about position in society. Falk and Campbell (1997) have interpreted these changes as hallmarks of contemporary urban society and linked them to the overall shift in contemporary society from a focus on production to a focus on consumption. Gerhard (2001), too, has explored the way in which lifestyle, especially leisure-oriented lifestyle, is having an impact on shopping behaviour. In this context, a distinction can be drawn between shopping as a functionalist-instrumentalist activity and shopping for pleasure, with the latter attaining increased importance in contemporary life. Lifestyle is of course very much about identity. Although "consumer therapy" as a way of making people feel good has been remarked upon for some time, possibly since Veblen's (1899) writing on "conspicuous consumption" (see Humphery, 1998), there is growing awareness that shopping behaviour is a manifestation of identity more generally (Glennie & Thrift, 1996). In a society where pluralism is celebrated and self-expression encouraged (Jackson, 1999), retail centres constitute "the context within which people work out their identities" (Lunt & Livingstone, 1992, p. 24). Put simply, it is through markets for commodities that many choices about self and biography are made (Glennie & Thrift, 1996). Humphery (1998, p. 7) summed it up well: “consumption has not only become an apparently ubiquitous part of our daily life, but has become entangled with and productive of meanings, of the way we view and represent the social world, think about ourselves and communicate with others”.

Beauregard (1986) has noted that new “consumption spaces” outside the home have emerged to cater for changing lifestyles. Examples can be seen in restaurants and nightclubs and the specialised shopping precincts remarked upon by Wrigley and Lowe (2002). One place where the retail manifestations of identity and lifestyle have been clearly documented is the gentrified suburb. In the Australian context, the “micro retailscape” of inner suburban Sydney has been well documented by Bridge and Dowling (2001), highlighting the diversity of consumption patterns. Connell (2000, p. 11), too, has noted “a focaccia and cappuccino city culture…celebrating the delights of a multicultural cuisine” in such areas of Sydney, observing wryly that a growing gym culture has also emerged to take off what the new cuisine has put on.

Gentrification can be linked to individualised rather than mass consumption (Bridge & Dowling, 2001). Whether similar changes in consumption are evident in suburbia generally, and whether they are evident beyond the “micro-scale”, is not clear. If they are, there should be change in the retail spatial structure. Given this background, this article investigates the extent and nature of change evident in suburban Sydney in the 1990s to see if lifestyle and leisure-related shopping activity is manifest in the nature and composition of shopping centres.

The study area

Hurstville, Kogarah and Rockdale are three Sydney local government areas (LGAs) inland from Botany Bay (Figure 1). The three LGAs lie between 10 and 35 kilometres from Sydney's CBD. They were chosen as study areas because the nature of their retail spatial structures as they existed in 1969 has been documented (Walmsley, 1974) as have the changes that occurred in the 1970s and 1980s (Walmsley and Weinand, 1990; 1991). Hurstville, Kogarah and Rockdale are in a long-settled part of Sydney and therefore free from the rapid development and redevelopment pressures evident on the metropolitan fringe and inner suburbs respectively. The demographic profile of the areas is presented in Table 1 in comparison to Sydney as a whole. A socio-economic profile is presented in Table 2.

(Figure 1 and Tables 1 and 2 about here)

Between the 1991 and 2001 Censuses, marking the approximate beginning and end of the study period, the population of the study area grew by 7.8%. This is less than two-thirds of the growth rate for the Sydney metropolitan area as a whole, reflecting the fact that the study is a long established part of the city. The fastest growth was recorded in Hurstville and the slowest growth in Rockdale. Despite these differences in growth rates, the age profile of the three LGAs is very similar. The median age was identical in all three LGAs in 2001 and there was very little difference in the proportion of the population who were either school-age children or retirees. Compared to Sydney as a whole, there were fewer children and more people aged 65 and over in both 1991 and 2001, again reflecting the established nature of the suburbs in this part of Sydney. There were also more overseas-born in the study area in 2001 than in Sydney as a whole and the overseas-born population is becoming increasingly prominent. In 1991 Rockdale had 38% of its population born overseas. This percentage was above the metropolitan average and well above the figures for Hurstville and Kogarah. By 2001, the proportion of Rockdale's population born overseas had increased to 40% and Hurstville and Kogarah also recorded figures above the metropolitan average. The median household size throughout the study area was fairly uniform and very similar to the figure for Sydney as a whole throughout the study period, as were the proportions of one family and lone person households. In terms of changing residence, the inhabitants of all three LGAs were less mobile than those of Sydney as a whole in 1991. By 2001, levels of mobility had increased and the difference between the study area and Sydney as a whole had narrowed (Table 1).

In short, Table 1 suggests that there are no major demographic drivers of changes to the retail structure in the 1990s except perhaps for the marked growth in the immigrant population. Changes are more apparent in relation to the socio-economic profile of the three LGAs (Table 2). In brief, unemployment fell (but with Rockdale still above the metropolitan average) and the proportion of the population aged 15+ with tertiary education qualifications rose by more than 60%. Not surprisingly, then, there was a growth of at least nine percentage points in the proportion of workers employed in professional and managerial positions. Median family incomes in Hurstville and Kogarah were very similar to the metropolitan average in 2001 but Rockdale lagged a little. Perhaps reflecting this, the rates of owner occupation/purchasing were lower in Rockdale than elsewhere (and, in Rockdale's case, below the metropolitan figure). Living in flats, units and apartments became much more common in 2001 than in 1991 with more than one-third of Rockdale's occupied dwellings being in this category. In Hurstville and Kogarah, the inhabitants of about one in six dwellings had no motor vehicle. The inhabitants of Kogarah were slightly more mobile. In short, in the period 1991-2001, there was a shift to higher rates of participation in the paid labour force, higher formal qualifications, higher status jobs and more income. However, owner occupation/purchasing became less common and more of the housing stock took the form of flats, units and apartments.

Retail change in the 1970s and 1980s

In order to set the scene for an analysis of changes to the retail spatial structure of the study area in the 1990s, it is necessary to describe how change was measured and what changes had occurred prior to the 1990s. Any longitudinal study of retail change is unavoidably influenced by methodological decisions made at the outset. Although there are alternative ways of studying shopping centre composition (for instance through business directories), the first (1969) survey of retail spatial structure in the study area resolved that the best way, in the sense of producing the most valid data, was to count actual shops (Walmsley, 1974). As a result, information was collected about *functions* (types of shops) and *establishments* (actual stores). A minimum threshold of five occupied shops was used to define shopping "centres". These had to be contiguous or separated by no more than three units on non-retail land use (eg two houses and a church). Shops on opposite sides of a street were deemed to be contiguous.

Johnston's (1966) classification of functions was adapted and extended to produce a list of 81 functions which covered all the establishments in the 50 shopping centres identified within the study area. Although a plot of functions against establishments approximated a continuum, a five-fold hierarchy of centres could be identified using a variety of statistical grouping algorithms (Walmsley, 1974). Perhaps a little forced, this hierarchy comprised one first-order centre (the largest), one second-order centre, seven third-order centres, nine fourth-order centres and 32 fifth-order centres (the smallest).

The retail spatial structure of the study area was re-surveyed in 1989 using exactly the same fieldwork protocols as two decades earlier. The results of the second survey were striking (Walmsley & Weinand, 1991). In terms of functions, some had become markedly less widespread, as measured by their *ubiquity function* (the number of centres in which a function is present divided by the total number of centres). Others had become much more widespread. Many new retail activities had emerged that did not fit the 1969 classification and for which new categories had to be invented (17 in total) (Table 3).

(Table 3 about here)

In terms of establishments, there had been a very significant increase in the study area. The overall number grew by 21.7% despite an overall population decline of 3.0%. In other words, there seemed to have been a fairly major suburbanisation of retailing. Interestingly, the percentage of all establishments which were empty at the time of the surveys was remarkably similar: 5.1% in 1969 and 5.4% in 1989.

Particularly marked was the suburbanisation (in the sense of a growth of more than ten percentage points in their ubiquity score) of professionals, especially doctors, dentists, solicitors, optometrists, accountants and vets (Table 4). In addition, there was growth of what might be thought of as functions linked to “lifestyle”, notably eating places, fitness and health centres, hotels and clubs, bottle shops, florists, laundrettes, outlets for motor vehicle accessories, and personal services (such as beauticians and travel agents). Office supplies, cameras and photographers also increased. Supermarkets, too, became more common despite their having been very widespread for some time. New types of functions also featured lifestyle-oriented activities and professionals. Examples are to be seen in video shops, pools, physiotherapists, chiropractors, hirers of clothes, art supplies and niche providers like specialists in stained glass and tattoos.

(Table 4 about here)

The 10 functions to become much less common than previously included milk bars, greengrocers, butchers, chemists and fishmongers. Growing competition from supermarkets which were becoming more common was perhaps behind these trends. There was also a marked (more than 10 percentage point) drop in the ubiquity function for men's clothing, general clothing, and jewellery. The merging of the distinction between department stores and stores such as Target, K-Mart and Big W perhaps accounts for this trend. Finally (in the top 10 declining functions), there was a drop the ubiquity of men's hairdressers and dry cleaners.

It was particularly interesting to discover that the growth of suburban retailing was not uniform. Of the centres that existed in both 1969 and 1989, 17 declined in size, three remained exactly the same, and 28 grew in size. Four new centres emerged (in the sense of being built as centres after 1969 or expanding from a threshold size below five contiguous establishments in 1969). Two centres existing in 1969 had fallen below the minimum threshold by 1989. In short, the suburban growth of retailing was selective. There was however no clear-cut pattern in the picture of growth and decline. On the whole, bigger centres tended to do better (at least to the extent that the mean size of growing centres was

68 establishments as opposed to 34 establishments for declining centres). However, a curious pattern emerged whereby decline was very evident in centres along the East Hills railway line (but not the Cronulla railway line) and in centres where traffic congestion was a major problem (Bexley and South Hurstville) (Walmsley & Weinand, 1991).

In short, by 1989, it was becoming clear that the retail spatial structure of Hurstville, Kogarah and Rockdale was becoming increasingly complex. Functions were becoming more varied, shops more numerous, and centres more distinctive. The central place hierarchy had also become more complex with the larger centres describing a k=3 system (where different levels of the hierarchy are present in the ratio 1:2:6) and the smaller centres a k=7 system (where the ratio between the different levels of the hierarchy is 1:6:42) (Walmsley and Weinand, 1990). Clearly, then a considerable degree of restructuring had occurred in the retail spatial structure of the study area prior to the 1990s.

Change in the 1990s

In order to see whether change continued in the 1990s, and to investigate the possibility that lifestyle changes were manifest in the composition of shopping centres (and thereby continuing a trend which seemed to be emerging in the 1989 survey), a third survey was conducted in 1998, again using the same fieldwork methodologies and protocols. This survey showed another increase in the number of establishments. The total overall number in the three LGAs grew from 2608 to 2772, representing an increase of 6.3% (Table 5). In annual terms (0.7%), this growth rate is equivalent to approximately one-third of the average annual growth rate recorded between 1969 and 1989. Interestingly, the percentage of establishments which were empty at the time of the third survey increased from 5.4% in

1989 to 10.0%. When set in the context of population growth (Table 1), the growth in the number of establishments shows a degree of stability in retail provision in the 1990s: in crude terms, the number of "people per shop" went from 93 in about 1970 to 74 in about 1990 to 84 in about 2000.

(Tables 5 and 6 about here)

In terms of the functions which were present, the pattern was very interesting. The list of functions that had increased from 81 in 1969 to 98 in 1989 had to be extended yet again – and very significantly – to accommodate new types of shops. A further 32 functions were identified (Table 6). Some of these provided very specialised retail outlets selling equipment for the home: signs; sheepskins; kitchenware; and doors. Very prominent were retail activities linked to hobbies: badges; guns; stamps; medals; dolls (including doll repair); and beads; together with activities such as ballroom and belly dancing and the sale of go-karts. Growth in the variety of personal services was also evident with the emergence of various functions: massage; dog clipping; clothing repair; educational consultancies; psychology services; occupational therapy; hearing aid services; iridology; herbalism; and the provision of orthopaedic equipment. In many ways, these personal services reflect the life cycle stage that some residents of the area are at (for example hearing aids and orthopaedic equipment for the increasing number of aged residents). The large majority of these new functions is more directly linked to *lifestyle* rather than life cycle (although the two are obviously very closely interrelated). Lifestyle considerations were also evident in the emergence of retail outlets geared to phones and telecommunications, party goods, duty free shopping, and perfume and soap. At the same time, some of the emergent functions were less easily explained and no doubt reflect changes in the nature of society generally.

For example, discount outlets came on the scene and “op shops” emerged as a category. Community services and business services also emerged. Additionally, there was a specialist in maps and a recording studio.

In terms of ubiquity function, some of the functions evident in 1989 declined whereas others increased. However the pattern was much less marked than it had been over the 1969-1989 period. The only functions to become much more widespread (an increase of ten percentage points or more in their ubiquity score) were supermarkets, electrical repair shops, beauticians, and computer providers. The three functions to become less widespread were butchers, chemists and hardware/homeware specialists.

In short, the retail stock in suburbia – based on the Hurstville, Kogarah and Rockdale case study – is increasing in size in a way that keeps pace with population growth and, at the same time, is becoming much more varied. This is a further (and perhaps final) nail in the coffin of the idea of distinct “orders” of functions with the highest order goods (the least ubiquitous) being located in the highest order central places. It is also interesting to note that the percentage change in the number of establishments varied between the three LGAs. In Hurstville, the number of establishments increased by 9.7% between 1989 and 1998, In Rockdale, it increased by 5.9%. However, retail provision in Kogarah barely changed, with an increase in the number of establishments of only 0.2%. In other words, the rate of growth in the number of shops in Kogarah fell well behind the rate of population growth whereas in Hurstville and Rockdale the two were approximately equal. Kogarah is of course the LGA where there is the lowest proportion of dwellings without a motor vehicle and therefore, potentially, the most mobile population. It is however important to note that inter-LGA comparisons are somewhat artificial because many shopping centres lie very close to LGA boundaries and no fewer than seven centres transcend such boundaries. It also needs to be noted that extremely few residents of the study area live more than one kilometre from a shopping centre (with at least five establishments) and the majority live within three kilometres of a shopping centre with at least 50 establishments.

Given the change in establishments and functions, it is no surprise that the number of centres also changed. Four centres had “disappeared” by 1998 (in the sense of falling below the threshold of five occupied establishments). Two new centres had appeared (in the sense of growing above the minimum threshold). “New” and “disappearing” centres are of course only the extremes of the spectrum of change.

It is possible for a centre to grow in terms of both the number of establishments it contains and the number of functions which it provides. Alternatively, a centre may decline in terms of both functions and establishments. Looking at the 48 centres which existed in both 1989 and 1998, it is apparent that 10 grew in terms of both functions and establishments and nine declined in terms of both indicators. Two centres had exactly the same number of functions and establishments in both 1989 and 1998. In other words, the majority of centres experienced a mixed pattern of growth and decline: two centres had growing functions and declining establishments; 12 centres had declining functions and increasing establishments; six centres had no change in the number of functions and a growth in the number of establishments; four centres had no change in the number of establishments but a decline in the number of functions; two centres had no change in functions but a decline in establishments; and one centre had no change in establishments but a growth in functions. This suggests that no fewer than 22 of the 48 centres had become more specialised in that their number of establishments had increased relative to their number of functions. In other words, they showed increased “depth” in the services they provided.

(Table 7 about here)

In short, the pattern of change in the shopping centres in Hurstville, Kogarah and Rockdale is very complex. There seems to be a continuing tendency for large centres to be growing and small centres to be declining in the sense that, at the end of the study period (1998), the mean size of centres which were growing in terms of both functions and establishments was 102 shops whereas the mean size of centres which were declining in terms of both functions and establishments was only 35 shops (Table 7). However, the growing centres were almost matched in size by those which grew in terms of functions but declined in terms of establishments (mean of 99 shops) and those which grew in terms of establishments but declined in terms of functions (mean 80 shops). In terms of the geographical distribution of growth and decline, there is no simple picture as there was, for example, with small centres and with the East Hills railway line in the period 1989-1998.

In summary, the pattern that emerges in respect of the retail scene in the study area is one where there is growth in terms of the number of shops to more or less match population growth and increasing diversification in terms of the retail functions which are available and the places where these are available.

Discussion and policy implications

This study suggests that the notion of clear hierarchies of shopping centres, based on central place theory, has very little relevance to suburban retailing these days and is therefore of little value in the policy arena (see also Walmsley & Weinand, 1990). What we are witnessing is probably not able to be summarised in any one simple locational model. Indeed, what is evident in the data might be illustrative of the postmodern trend towards increasing differentiation in society (King, 1995). In this view of the world, the emphasis is on heterogeneity, particularity, and the unique. Place is not seen just as the location where social processes are acted out. Rather, place influences the way in which those processes are manifest. Thus, features such as globalisation and advances in telecommunications bring with them homogenising forces but, at the same time, provoke opposition to homogenisation. So, universalism stimulates particularism, homogenisation provokes differentiation, integration prompts fragmentation, centralisation is countered by decentralisation, and time-space convergence can also serve to highlight local social and cultural differences (King, 1995; Walmsley, 2000). Some (or all) of these features might underpin the changes that are occurring in southern Sydney's retail provision. Different local populations may interact with local retailers in ways which differ from one locality to another. In this sense, it is perhaps unfortunate that there were few major differences in social and demographic profile between the populations of the three LGAs in the study area. More striking differences might have produced greater variations in the retail spatial structure. As it is, however, the data and anecdotal observation of shop employees during fieldwork suggest that a greater migrant presence might be implicated in the relatively rapid growth in retailing in some parts of the study area.

This study has suggested that changes in the salience of lifestyle in contemporary Australian society are associated with a blurring of the distinction between shopping and leisure and with a propensity for shopping and consumption to be increasingly instrumental in the formation of identity. Moreover, it has been argued that these lifestyle changes are linked to changes in the retail spatial structure of the case study area, notably through the emergence of new and lifestyle-oriented types of goods and services, through the changing ubiquity scores for different functions, and through the increased diversity and differentiation of shopping centres. Policy makers need to realise that this trend is likely to continue. The demographic and socio-economic profile of the area is such that home ownership levels are falling. An increasing proportion of the population is renting. Similarly, flat and apartment dwelling is becoming more common. If these trends continue, there may be a lower level of home-related shopping than has been the case in the past. Freed from mortgage constraints, people might also spend more of their disposable incomes.

The increasing differentiation and variety within the retail spatial structure of the study area has certain policy implications. To begin with, in terms of land use, the suburbanisation of retailing seems to have stabilised. Overall, in the study area, the growth in the number of shops approximately matched the growth in population. In terms of commercially zoned land, the study area seems to have enough capacity, particularly given a doubling in the proportion of empty shops between 1989 and 1998. The evidence seems to suggest that no more land needs to be zoned commercial. Big suburban centres are certainly attractive and there is therefore likely to be pressure to locate within them. For example, the largest centre – Hurstville – increased its number of shops by almost 9% between 1989 and 1998.

However, relatively specialised establishments (in the sense of being representative of new and not very numerous functions) have located in small centres.

In addition to policy concerns related to land use zoning, the study throws into question the theoretical base for hierarchies of retail centres. Levels of car ownership and income are such that, in the study area, many consumers can access all centres. This phenomenon could extend to services generally (eg government services and health and well-being services). However, optimism about the ease with which people might travel around the study area needs to be tempered with a realisation that the population is ageing. This ageing, coupled with the increased real cost of car travel, might force retirees to use public transport, in which case greater emphasis will be placed on nodal points in bus and train routes.

The study of retail structure alone is of course insufficient. Social scientists and planners need to look at the behaviour of the business people employed in retailing in the study area, at the behaviour of consumers, and at the general socio-economic and political climate before any firm conclusions can be made about the links between lifestyle and the composition of shopping centres. There is also a danger in reifying “lifestyle” as a fixed entity. What is referred to here as “lifestyle” is really a manifestation of continuous social change (Shields, 1992) and, as such, it is always in a state of flux. Maffesoli (1989), for instance, has speculated about the emergence of (perhaps relatively transitory) “tribes”, collections of like-minded individuals in interest groups that transcend traditional divisions of society based on class and gender (see also Walmsley, 2000). We also need to note that consumer behaviour itself is subject to change. A prominent social commentator has stressed that consumers will always want “to shop in different ways at different times, according to stress levels, time of day, day of week, emotional mood, need for speed and convenience, desire for browsing, and so on" (Mackay, 1999, pp. xxiv-xxv). In a way, a focus on retail spatial structure takes stock of this fact because it examines how the retail system as a whole has responded to the rich variety of individual consumers. However, it is important that the present study be replicated in a range of settings so as to assess the degree to which its findings are able to be generalised. If replication shows a generalised pattern, then this case study can be used as a platform for cultural studies of precisely how "lifestyle" influences the character of individual shopping centres.

There are undoubtedly weaknesses in the present study. These need to be acknowledged in any replication. At a very simple level, the classification of functions is fraught with subjectivity. Wherever possible, the terminology employed to describe function was that used by the owners and managers of the shops themselves. However, it must be noted that terms such as "supermarket" are often used very loosely by operators. Just as importantly, "scrambled merchandising" is becoming the norm. For example, it is now very common for a single store to offer a wide variety of functions. Given this range of functions, classifying shops according to the function which appears to dominate may not be very meaningful. Similarly, treating a large shopping centre as if it is a single centre in experiential terms, from a consumer's perspective, is of debatable value. It may be that consumers commonly use only part of a large centre. It may be, for instance, that some consumers use only the Westfield part of Hurstville, or only Southside Plaza at Rockdale. Similarly, it may be that, in behavioural terms, it is unwise to treat both sides of a street as part of the same centre if that street is subjected to very heavy traffic or has a barrier like central railings.

It also needs to be noted that this study is really an exercise in “comparative statics” (Cullen, 1978) in the sense that a clear picture of retail spatial structure has been recorded at different points in time but no indication given of the nature of change between those times. It is tempting, for instance, to point to a slowing in the rate of growth of establishments after 1989. However, it may be that this slowing began some time before 1989. After all, change can be gradual and incremental. It takes time for any physical structure (such as the provision of shops) to respond to changing behaviour (such as new consumer demands) and yet we know very little about the nature of any such lag except that it depends on a perception by entrepreneurs that demand has reached a critical threshold of commercial viability. Similarly, a simple count of establishments gives no indication of changing ownership patterns. This issue of ownership is important because observation during fieldwork would suggest the prominence of family networks of recently arrived migrants in the operation of stores, especially convenience goods outlets in the smaller centres, a phenomenon noted elsewhere in Sydney (Burnley, 2002; Lawson, 2003).

Conclusion

This paper began by pointing out that the two main theoretical approaches in research on retailing – an emphasis on retail spatial structure and an emphasis on cultures of consumption – have rarely been brought together. It then rectified this situation to a degree by examining the changing nature of retail spatial structure in a suburban case study area and setting that change in the context of societal trends towards a greater emphasis on lifestyle in identity formation. In showing that retail spatial structure seems to be responding to an increased concern for lifestyle, the paper throws down a challenge to social scientists to re-theorise the nature of retail change, taking on board postmodern thinking, and to redefine the agenda of studies in retailing to pay attention to patterns of consumer spatial behaviour, patterns of ownership, the decision processes which underpin consumer travel patterns, and – above all – the differentiation of shopping centres one from another. In particular, the changing nature of society, the increased emphasis on leisure, and the importance of lifestyle and culture, need to be taken into account. These need to be added to the existing concern for uneven development, the division of labour, industrial restructuring, and flexible accumulation (Lowe & Wrigley, 1996) so that retail studies take *both* the economic and the cultural seriously (Blomley, 1996, p. 238). From a theoretical and policy perspective, these two themes in retail research need to be blended together. Retailing is an important field of study and it is strange and regrettable that it has been relatively ignored in recent years.

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Table 1. Demographic profile

		Hurstville	Kogarah	Rockdale	Sydney
Population	1991	63757	46518	84074	3538314
	2001	70642	50340	88523	3997321
% annual change		2.2	1.6	1.1	2.6
% aged <15	1991	18	18	17	21
	2001	19	19	18	20
% aged 65+	1991	16	17	16	11
	2001	16	15	16	12
Median age	1991	35	36	35	32
	2001	37	37	37	34
% born overseas	1991	26	28	38	30
	2001	34	34	40	31
Median household size	1991	2.7	2.7	2.7	2.8
	2001	2.7	2.7	2.6	2.7
% same address 1 year ago	2001[a]	79	79	77	77
% same address 5 years ago	1991[b]	65	63	61	57
% same address 5 years ago	2001[b]	55	56	54	52
% population in one family households	1991	87	85	82	86
	2001	84	84	81	84
% population in lone person households	1991	8	9	10	8
	2001	9	9	10	9

[a] Persons aged >1; [b] persons aged 5+
Source: Census data 1991 and 2001

Table 2. Socio-economic profile

		Hurstville	Kogarah	Rockdale	Sydney
% labour force unemployed	1991	7.7	7.7	10.6	10.3
	2001	5.5	4.9	6.3	6.1
% population aged 15+ with diplomas or degrees	1991	13	15	10	15
	2001	22	25	19	23
% employed persons in professional/managerial positions[a]	1991	30	35	25	33
	2001	39	44	35	42
Median Family income ($)	1991	700-799	800-899	600-699	700-799
	2001	1000-1199	1000-1199	800-999	1000-1199
% population owning/purchasing housing	1991	74	73	67	69
	2001	69	71	64	66
% occupied dwellings that are flats, units, apartments	1991	19	25	30	22
	2001	26	29	34	25
% dwellings with no motor vehicles	2001	16	13	17	14

[a] Includes associate professionals
Source: Census data 1991 and 2001

Table 3. Retail change 1969-1989

Establishments	+ 21.7%
Functions	+ 17 (81 to 98)
Empty shops	5.1% to 5.4%
Centres	+ 2 (-2, +4)
Population change 1971-1986	- 3.0%

Table 4. Changes in ubiquity 1969-1989 – growing functions (>10 percentage points) and new functions (*)

Accountant	Medical benefits*
Art supplies*	Motor vehicle accessories
Beautician*	Optometrist
Bottle shop	Pawn shop*
Camping & outdoor equipment*	Pest control*
Chiropractor*	Physiotherapist*
Computers*	Pools*
Dentist	Solicitor
Doctor	Sportswear*
Eating place	Stained glass*
Fitness & health club*	Tattooist*
Florist	Travel agent
Hire clothes*	Unisex hairdresser*
Hotel/club	Vet
Laundrette	Video shop*

Table 5. Retail change 1989-1998

Establishments	+ 6.3%
Functions	+ 32 (98 to 130)
Empty shops	5.4% to 10.0%
Centres	- 2 (-4, +2)

Table 6. Changes in ubiquity 1989-1998 – growing functions (>10 percentage points) and new functions (*)

Badges*	Herbalist*
Ballroom/belly dancing*	Iridologist*
Beads*	Kitchenware*
Beautician	Maps*
Business service*	Massage*
Clothing repair*	Medals*
Community service*	Occupational therapist*
Computers	Op shop*
Discount store*	Orthopaedic equipment*
Dog clipping*	Party goods*
Dolls & doll repair*	Perfume & soap*
Doors*	Phones/telecommunications*
Duty free*	Psychologist*
Educational consultant*	Recording studio*
Electrical repairs	Sheepskins*
Go-karts*	Signs*
Guns*	Supermarket
Hearing aid specialist*	Stamps*

Table 7. Mean size (in establishments) of centres in 1998

		Establishments	
		Growth	Decline
Functions	Growth	102	99
	Decline	80	35

Caption

Figure 1. The study area

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