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Shopping Centre Surveys in Five States

Showing effects of Site-value Taxation with Exemption of Buildings upon Development of Business Centres of Australian Towns as Reflected in their Modern or Obsolete Appearance.

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Shopping Centre Surveys in Five States

Effects of Exemption of Buildings and Site-Value Taxation

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Municipal finance in Australia is based on local taxation of property according to its value. The municipal units fall into two groups following different principles of application. One group exempts the buildings and cultivation or other improvements, and bases the rate (or local tax) only upon the bare value of the site itself. The other bases the rate upon the value of the site **plus** the improvements.

Local taxation on the value of land **plus** improvements was universal in Australia until 1887. Exemption of improvements was first developed in Queensland and rapidly extended to become the dominant practice over the Commonwealth. Exemption of improvements and taxation of sites has now operated generally in Queensland municipalities for 68 years, New South Wales for 50 years, as also for rural districts of West Australia, and for much shorter but still long periods in South Australia and Victoria. Only in Tasmania has it received no application as yet.

These periods are long enough to warrant expectations of visibly superior development in municipalities following this practice as compared with those where penalties are imposed on improvements. As the whole of our economic life depends upon the multiplication of buildings and other "improvements," a survey was undertaken by the Land Values Research Group to compare the development in places following these radically different policies.

Nature of Survey.

The principle followed in this survey is the same as that used in agricultural science to compare the effects of new fertilisers on crops. Test fields are planted with the same cereal but one treated with the fertiliser while the other is not. The plants vary greatly in size and yield if compared individually. But these individual variations are swamped out in the average over the whole field, leading to sound conclusions on the effect of treatment.

So if observations were taken over a sufficient number of municipalities under each system and conclusions restricted to the group averages, we could find whether our fertiliser (taxation of sites instead of buildings) produced superior results.

Modernisation of Shopping Centres the Yardstick.

The best yardstick available to measure the effect of exempting buildings and other improvements is the extent of modernisation or obsolescence of shops in the business centres. Reasons for this are that shops are close together in compact areas which can be easily studied; the effects of competition in bringing modernisation are more rapid than with residential development; there are commonly accepted standards of conformity with shops; the condition of the business community disclosed by a shopping survey will also be a reflection of the conditions of their customers; and simple tests can be applied to assess modernisation or obsolescence of shops.

There are two clear-cut stages of modernisation of shops that can be pin-pointed in Australia. The older and now obsolete types had wood or stone-frame windows and pillar supported verandahs.

First stage of modernisation was to supplant the old with the new metal-framed windows. With these came tiled fronts. Next stage was replacement of the pillar-supported verandahs with modern cantilever types. There are many further refinements of modernisation, but the presence or absence of the two basic stages mentioned has proved quite sufficient to show some startling differences between the municipal groups according to whether they exempt or tax improvements.

Surveys were taken between May, 1956, and May, 1958, in a total of 353 cities and townships in Victoria, New South Wales, Queensland, South Australia and Tasmania. These covered in succession all towns passed through on the main roads traversed and included more than two-thirds of all provincial townships within a band of about 100 miles width and 2,200 miles length, extending from Port Augusta in South Australia to Maryborough in Queensland, with a few additions outside that as well as most Tasmanian towns.

The number of towns studied is large enough to enable reliable conclusions to be drawn from comparisons. These are made in five groups, according to the total number of shops contained in the business centre of the towns.

These groups comprise:—

(1) Major cities with more than 300 shops in the main centre;

(2) cities and towns having between 91 and 300 shops in the main business centre;

(3) towns with 41 to 90 shops;

(4) medium-sized townships with between 21 to 40 shops;

(5) small townships with between 5 to 20 shops.

Each operator was counted irrespective of size, i.e., large emporiums occupying several normal sites were counted as one shop. Only shops with road frontage were counted, others within arcades being ignored. The counts were restricted to recognised type shops and did not include hotels, banks, insurance offices and garages, which have different standards. However, in some cases normal shops were found to be used as temporary offices for banks and insurance firms, and these were counted as shops.

Classification Code.

Shops were classified as "Modern," "Semi-Modern," or "Obsolete," according to whichever of the following criteria applied:—

Modern shops which had **both** metal-framed windows **and** cantilever verandahs;

Semi-Modern shops with—
(a) metal-framed windows **but** pillar-type verandahs;
or (b) metal-framed windows **but** no verandahs;
or (c) wood or stone-framed windows **and** cantilever verandahs.

Obsolete shops with—
(a) wood or stone-framed windows **and** pillar verandahs.
or (b) wood or stone-framed windows and **no** verandahs.

Overall Results.

The table below compares the proportion of shops which are "modern," "semi-modern" or "obsolete" for the average town within these five size ranges. The comparisons are in two sections according to whether buildings are exempt from or subject to local taxes.

Size Range	Range in Number of Shops in Business Centre	No. of Towns	Total Shops	Avge. No. per town	Mod. %	Semi-Mod. %	Obs-lte. %	Overall Percentage Imprvmnt. % *
(A) Where Buildings are Exempt and site-value only taxed.								
1	Over 300 shops	5	2,822	564	85	13	2	91·5
2	Between 91-300	40	5,930	148	61	24	15	73
3	Between 41-90	45	2,699	60	56	25	19	68·5
4	Between 21-40	28	846	30	44	24	32	56
5	Between 5-20	29	309	11	21	19	60	30.5
(B) Where Buildings are Taxed and charges on sites low.								
1	Over 300 shops	7	4,443	635	37	38	25	56
2	Between 91-300	22	2,955	134	34	37	29	52·5
3	Between 41-90	52	3,166	60	27	33	40	43·5
4	Between 21-40	47	1,411	30	20	27	53	33·5
5	Between 5-20	78	868	11	13	16	71	21

* The last column gives a single figure showing the weighted average extent of improvement for the towns as a whole. This is simply the percentage figure for the modern (which have two stages of modernisation) plus half the percentage of the semi-modern (which have only one stage of modernisation).

The modernisation shown in this survey is an overall picture of the pattern whether achieved by actual replacement of the obsolete types or by new buildings of modern type improving the average. For the larger centres it will be predominantly the former—for the smaller centres predominantly new buildings.

For the first four size ranges in towns where buildings are exempt and sites taxed, the proportion of shops in the "modern" class is double, and the proportion in the "obsolete" class only about half that in the comparable size range still taxing buildings. For the last range containing the smallest size towns the superiority is not so great but is still clear-cut.

The towns in the 5 to 20 shop range are relatively stagnant as shown by the predominance of the "obsolete" classification. The implications of this are that the economic climate of the population served by the shops in these small towns is too poor to warrant the shopkeepers modernising their premises, or competition to establish new shops which would raise the overall level of modernity.

Where there is keen competition to establish more shops and modernise old ones, it is a clear indication that the volume of business is good and that the economic condition of the customers is sound.

The conclusion is warranted that the "fertiliser" of exemption of buildings from local taxes has had a marked long term effect in producing a superior "crop" of modernisation of business centres in each of the comparable size ranges.

Numbers of Towns in Size Groups.

The proportion which the numbers of towns in the size groups bear to the totals surveyed are in themselves significant. These are set out below:—

Range in Number of shops in business centres.	Buildings Taxed: No. of Towns	Buildings Taxed: %	Buildings Exempt: No. of Towns	Buildings Exempt: %
91 or more shops	29	(14)	45	(30½)
41 to 90 shops	52	(25)	45	(30½)
21 to 40 shops	46	(23)	28	(19)
5 to 20 shops	79	(38)	29	(20)
	206	(100)	147	(100)

Where buildings and other improvements are exempt from local taxes, 61 per cent. of the towns are found to be in the two top groups with 41 shops upwards, while only 39 per cent. have less than 40 shops. **Where buildings are taxed the position is completely reversed, with only 39 per cent. in the larger and 61 per cent. in the smaller size range.**

This would naturally follow from the observed results of other studies made by the Research Group which show that house (and other) building activity stabilises at a higher level where buildings are exempt and sites taxed than where the opposite course is followed. This gives a higher level of prosperity with more spending money in the hands of customers where buildings are tax-free.

The inference seems clear that in two-thirds of the towns exempting buildings, customers are numerous and prosperous enough to sustain more than 40 shops by their spending, while only one-third are able to support such a number where buildings are taxed.

Major Cities Compared.

Some of the most striking comparisons are seen in the major cities with more than 300 Shops, which include the capital cities in the five States.

City	Number of Shops: Modern	Semi-Mod.	Obsolete	Total	Percentages: Mod.	Semi-Mod.	Obs.	Over-all	Date of Survey
(A) U.C.V. (Buildings exempt from local rates) :—									
Sydney	1,081	89	13	1,183	91	8	1	95	Nov. 56
Newcastle ...	353	33	5	401	91	8	1	95	Aug. 57
Wollongong ...	285	16	1	302	95	5	0	97	Aug. 57
Brisbane	468	135	24	627	74	22	4	85	Jul. 56
Toowoomba ...	224	68	17	309	72	22	6	83	Aug. 57
Totals (5) & Averages				2,822	85	13	2	91·5	
(B) N.A.V. (Buildings subject to local rates) :—									
Melbourne ...	471	456	112	1,039	45	44	11	67	Jul. 57
Adelaide	249	465	195	909	27	51	22	52·5	May 58
Hobart	320	129	109	558	57	23	20	68·5	Dec. 57
Launceston ...	311	120	120	551	56	22	22	67	Dec. 57
Ballarat	181	233	173	487	17	48	35	41	Sep. 57
Bendigo	81	176	189	446	18	40	42	37·5	Aug. 57
Geelong	173	166	114	453	38	37	32	56·5	Oct. 57
Totals (7) & Averages				4,443	37	38	25	56	

Those exempting buildings average 85 per cent. in the modern class against only 37 per cent. where buildings are taxed. **Every** city in the exempt group has a much higher proportion "modern" than has **any** in the taxed group.

The contrast is even more striking for the "obsolete" category. None of the "exempt" cities have any appreciable proportion of obsolete shops. The group as a whole only averages 2 per cent. This compares with an average of 25 per cent. for the "taxed" group. **Thus obsolescence is more than 12 times as great.**

The comparatively high proportion "modern" in Hobart and Launceston is due to their adoption many years ago of by-laws outlawing pillar type verandahs. This has some effect in channelling new building to provide cantilevers. Melbourne has more recently adopted a similar by-law. The immediate effect was that pillar verandahs were pulled down but not replaced with cantilevers.

The Melbourne survey was completed in July, 1957. Much modernisation is now in progress as part of a general business building boom largely stimulated by higher valuations and charges imposed under the State Land Tax with consequent pressure for more economic development.

The high proportion of modern shops in central Brisbane is surprising, since pillar-supported verandahs are prominent in the approach through the suburbs to the city and are still being erected in some new suburbs. The reason probably lies in that the whole of Greater Brisbane is one municipal rating unit. As such the rates payable on shop-sites in the main centre (where values are high) are considerable enough to induce economic use. In suburban centres values and rates are too low to bring economic pressure towards improvement.

Towns with 91 to 300 Shops in Main Centre.

(B) BUILDINGS SUBJECT TO LOCAL RATES (N.A.V. Basis) :—

	Numbers of Shops				Percentages			Date
Municipality	Modern	Semi-Mod.	Obsolete	Total	Mod.	Semi-Mod.	Obs.	of Survey
Ararat	21	68	15	104	20	65	15	Nov. 56
Bairnsdale	40	61	47	148	27	41	32	Aug. 57
Benalla	54	51	30	135	40	38	22	May 58
Camperdown	18	24	51	93	19	26	55	Jul. 56
Castlemaine	23	51	58	132	18	38	44	Dec. 56
Colac	57	60	52	169	34	36	30	Jul. 56
Kyneton	8	36	79	123	7	29	64	Jun. 56
Maryborough	32	58	41	131	24	44	32	Nov. 56
Mildura	103	65	30	198	52	33	15	Jun. 56
Mornington	52	22	17	91	57	24	19	Jun. 56
Sale	50	40	44	134	37	30	33	Jun. 56
Shepparton	119	63	13	195	61	32	7	Jun. 56
St. Arnaud	17	38	39	94	18	40	42	Dec. 56
Stawell	31	35	25	91	34	39	27	Dec. 56
Swan Hill	49	79	13	141	35	56	9	Aug. 57
Wangaratta	42	49	24	115	37	42	21	May 56
Warragul	58	29	19	106	55	27	18	May 56
Warrnambool	118	48	68	234	50	21	29	Jul. 56
Wonthaggi	13	36	49	98	13	37	50	Nov. 56
Horsham	47	73	16	136	35	53	12	Jan. 58
TASMANIA.								
Burnie	92	59	38	189	48	31	21	Dec. 57
SOUTH AUSTRALIA.								
Gawler	24	31	43	98	24	32	44	May 58
								(Overall)
Averages (22 Towns) ...				(134)	(34)	(37)	(29)	(52·5%)

Towns with 91 to 300 Shops in Main Centre.

(A) Buildings Exempt from Local Rates (U.C.V. Basis).

Municipality		Number of Shops				Percentages			Date of Survey
		Mod.	Semi-Mod.	Obso-lete	Total	Mod.	Semi-Mod.	Obs.	
VICTORIA.									
Chelsea ...	... (1923)	73	13	6	92	80	14	6	Jun. 56
Dandenong	... (1920)	60	23	13	96	63	24	13	,,
Echuca ...	... (1948)	27	79	43	149	18	53	29	,,
Frankston	... (1950)	84	52	7	143	59	36	5	,,
Hamilton	... (1944)	76	42	33	151	50	28	22	Jul. 56
Portland ...	... (1920)	40	47	24	111	36	42	22	,,
Ringwood	... (1951)	71	14	13	98	73	14	13	Jun. 56
QUEENSLAND.									
Bundaberg	... (1890)	47	60	37	144	33	41	26	May 56
Cairns ...	... ,,	70	157	51	278	25	57	18	Jul. 57
Gympie ...	... ,,	26	56	73	155	17	36	47	May 56
Ipswich ...	... ,,	71	63	55	189	38	33	29	Aug. 57
Mackay ...	... ,,	139	50	37	226	62	22	16	Jul. 57
Maryborough	... ,,	117	12	5	134	87	9	4	May 56.
Southport	... ,,	49	21	34	104	47	20	33	May 56
Townsville	... ,,	51	74	26	151	34	49	17	May 56
Warwick ...	... ,,	25	64	53	142	18	45	37	Aug. 57
NEW SOUTH WALES.									
Albury ...	... (1907)	123	50	7	180	68	28	4	Aug. 57
Armidale ...	... ,,	66	22	17	105	63	21	16	Aug. 57
Bathurst ...	... ,,	110	32	12	154	71	21	8	,,
Casino ...	... ,,	97	17	7	121	80	14	6	Jul. 57
Cootamundra	... ,,	64	19	12	95	68	20	12	Aug. 57
Cowra ...	... ,,	67	18	6	91	74	19	7	,,
Glen Innes	... ,,	66	26	3	95	70	27	3	,,
Gosford ...	... ,,	98	4	1	103	95	4	1	May 56
Goulburn	... ,,	163	22	2	187	87	12	1	,,
Grafton ...	... ,,	76	24	32	132	58	18	24	Jul. 57
Katoomba	... ,,	133	17	2	152	88	11	1	Aug. 57
Lismore ...	... ,,	182	15	1	198	92	7·5	·5	Jul. 57
Lithgow ...	... ,,	138	18	16	172	80	10·5	9·5	Aug. 57
Maitland ...	... ,,	152	31	7	190	80	16	4	,,
Murwillumbah	... ,,	103	33	26	162	64	20	16	Jul. 57
Orange ...	... ,,	183	24	20	227	80	11	9	Aug. 57
Penrith ...	... ,,	103	6	4	113	91	5	4	,,
Singleton ...	... ,,	74	25	18	117	64	21	15	,,
Tamworth	... ,,	148	15	6	169	88	9	3	,,
Taree ...	... ,,	66	54	14	134	49	40	11	Jul. 57
Wagga Wagga	... ,,	136	46	12	194	70	24	6	May 56
Young ...	... ,,	85	38	15	138	62	27	11	Aug. 57
SOUTH AUSTRALIA.									
Port Pirie	... (1911)	16	77	67	160	10	48	42	May 58
Mt. Gambier	... (1910)	91	37	50	178	51	21	28	,,
Averages (40 Towns) ...					(148)	(61)	(24)	(15)	(Overall) (73)

Date from which exemption of buildings dates shown next name of town.

Class 3 Towns.—With between 41 to 90 Shops.

(A) Buildings Exempt from Local Rates (U.C.V. Basis).

Municipality		Number of Shops Mod.	Semi-Mod.	Obs.	Total	Percentages Mod.	Semi-Mod.	Obs.	Date of Survey
VICTORIA.									
Cheltenham	... (1946)	44	16	8	68	64	24	12	May 56
Edithvale	... (1923)	35	4	5	44	79	9	12	Jun. 56
Mentone ...	... (1925)	71	4	5	80	89	5	6	,,
Mitcham ...	... (1952)	44	4	0	48	91	9	0	,,
Noble Park	... (1920)	29	6	7	42	69	14	17	,,
Springvale	... (1920)	54	13	2	69	78	19	3	,,
QUEENSLAND.									
Atherton ...	... (1890)	37	18	19	74	50	24	26	Aug. 57
Beaudesert	... ,,	11	12	18	41	27	29	44	,,
Coolangatta	... ,,	44	12	11	67	65	18	17	Jul. 57
Gatton ...	... ,,	31	11	11	53	58	21	21	Aug. 57
Mareeba ...	... ,,	34	14	36	84	41	16	43	,,
Nambour	... ,,	57	16	7	80	71	20	9	Jul. 57
Stanthorpe	... ,,	43	6	21	70	61	9	30	Aug. 57
NEW SOUTH WALES.									
Ballina ...	... (1907)	35	17	22	74	47	23	30	Jul. 57
Bega ...	... ,,	38	20	3	61	62	33	5	May 56
Belmont ...	... ,,	55	8	3	66	83	12	5	Aug. 57
Blackheath	... ,,	31	5	5	41	76	12	12	,,
Blayney ...	... ,,	21	16	13	50	42	32	26	,,
Camden ...	... ,,	56	1	2	59	95	2	3	Jul. 57
Coffs Harbour	... ,,	40	20	8	68	59	29	12	May 56
Gundagai	... ,,	17	19	15	51	33	38	29	Jun. 57
Holbrook	... ,,	6	15	26	47	13	32	55	,,
Junee ...	... ,,	26	32	16	74	35	43	22	Aug. 57
Kempsey ...	... ,,	49	21	5	75	65	28	7	Jul. 57
Macksville	... ,,	17	23	16	56	30	41	29	,,
Maclean ...	... ,,	20	16	15	51	39	32	29	,,
Muswellbrook	... ,,	43	13	20	76	57	17	26	Aug. 57
Nowra ...	... ,,	49	4	0	53	93	7	0	May 56
Port Macquarie	... ,,	47	6	4	57	82	11	7	Jul. 57
Port Kembla	... ,,	39	6	6	51	76	12	12	Aug. 57
Scone ...	... ,,	33	11	10	54	61	20	19	,,
Tenterfield	... ,,	50	13	8	71	71	18	11	,,
Thirroul ...	... ,,	39	9	6	54	72	17	11	,,
Tweed Heads	... ,,	21	19	20	60	35	32	33	Jul. 57
Woonona	... ,,	44	8	3	55	80	15	5	Aug. 57
Wyong ...	... ,,	34	6	2	42	81	14	5	Jul. 57
Yass ...	... ,,	28	42	14	84	33	50	17	May 56
SOUTH AUSTRALIA.									
Loxton ...	... (1927)	11	17	19	47	23	36	41	May 58
Murray Bridge	... (1925)	17	45	28	90	19	50	31	,,
Peterborough	... (1912)	7	45	20	72	10	62	28	,,
Port Augusta	... (1951)	16	41	9	66	24	62	14	,,
Renmark ...	... (1926)	20	20	28	68	30	30	40	,,
Victor Harbor	... (1952)	10	38	11	59	17	64	19	,,
Whyalla ...	... (1944)	43	20	4	67	64	30	6	,,
Averages (45 Towns) ...					(62)	(56)	(25)	(19)	(Overall) (68·5)

Shops Totalling 41 - 90.

(B) Buildings subject to Local Rates (N.A.V. Basis).

Municipality	Number of Shops				Percentages			Date of Survey
	Mod.	Semi-Mod.	Obs.	Total	Mod.	Semi-Mod.	Obs.	
VICTORIA.								
Bacchus Marsh	21	11	27	59	35	19	46	Sep. 57
Beechworth	1	27	27	55	2	49	49	Sep. 58
Belgrave	18	27	9	54	33	50	17	Nov. 56
Charlton	4	35	25	64	6	55	39	Aug. 57
Cobram	31	19	16	66	47	29	24	,,
Cohuna	2	28	12	42	5	66	29	,,
Croydon	33	11	9	53	63	19	18	Jun. 56
Daylesford	13	25	42	80	16	31	53	Aug. 57
Dromana	23	10	7	40	57	25	18	Jun. 56
Euroa	22	26	23	71	31	37	32	May 52
Healesville	24	19	16	59	41	32	27	Nov. 56
Inglewood	0	12	35	47	0	26	74	Aug. 57
Kerang	2	56	19	77	3	72	25	,,
Kilmore	6	19	27	52	12	37	51	May 52
Koroit	2	6	39	47	4	12	84	Jul. 56
Korumburra	12	36	28	76	16	47	37	Nov. 56
Kyabram	32	28	21	81	39	34	27	Jun. 56
Leongatha	30	18	13	61	49	30	21	Nov. 56
Lilydale	12	24	22	58	21	41	38	Jun. 56
Maffra	17	20	41	78	22	25	53	,,
Maldon	1	4	42	47	2	8	90	Dec. 56
Moe	44	3	8	55	80	6	14	Jun. 56
Morwell	32	19	3	54	59	35	6	,,
Nathalia	4	13	26	43	9	30	61	Aug. 57
Orbost	6	32	13	51	12	63	25	,,
Port Fairy	3	30	28	61	5	49	46	Jul. 56
Queenscliff	9	13	20	42	21	31	48	Oct. 57
Rochester	7	15	44	66	10	22	68	Jun. 56
Rosebud	42	18	14	74	56	24	20	,,
Rutherglen	2	17	39	58	3	30	67	Aug. 57
Seymour	9	16	30	55	17	29	54	May 52
Terang	29	13	14	56	52	23	25	Jul. 56
Trafalgar	12	13	27	52	23	25	52	Jun. 56
Traralgon	45	11	15	71	63	15	22	Jun. 56
Werribee	27	13	24	64	42	20	38	Jul. 56
Wodonga	14	35	17	66	21	53	26	May 52
Yarram	17	12	29	58	29	21	50	Jun. 56
Yarrawonga	13	50	18	81	16	62	22	Aug. 57
TASMANIA.								
Deloraine	14	7	21	42	33	17	50	Dec. 57
Latrobe	7	4	34	45	15	9	76	,,
New Norfolk	34	18	16	68	50	27	23	,,
Smithton	27	12	34	73	37	16	47	,,
Ulverstone	27	21	27	75	36	28	36	,,
Wynyard	17	10	36	63	27	16	57	,,
SOUTH AUSTRALIA.								
Berri	16	26	15	57	28	46	26	Apr. 58
Burra	0	22	23	45	0	49	51	,,
Clare	23	24	20	67	34	36	30	,,
Jamestown	0	27	36	63	0	43	57	,,
Kapunda	1	16	34	51	2	31	67	,,
Millicent	24	8	31	63	38	13	49	,,
Averages (52 Towns) ...				(60)	(27)	(33)	(40)	(Overall)

BRISBANE.

Area bounded by Alice Street, Ann Street, George Street and river to Boundary Street intersection with Ann Street. Survey taken July, 1956.

Street	Mod.	Semi-Mod.	Obs.	Total Shops	Mod. %	Semi. %	Obs. %	Overall %
George	64	42	2	108	59	39	2	78·5
Albert	47	15	3	65	63	20	17	73
Adelaide	129	19	0	148	87	13	0	93·5
Edward	50	26	1	77	65	34	1	82
Queen	114	19	3	136	84	14	2	91
Elizabeth	31	8	8	47	66	17	17	74·5
Ann	33	6	7	46	72	13	15	78·5
Totals & Avge.	468	135	24	627	74	22	4	85

Streets with less than 20 shops excluded include Wharf and Creek Streets.

ADELAIDE.

Area bounded by North Terrace, South Terrace, West Terrace and Hutt Street. Survey was taken in May, 1958.

Street	Mod.	Semi-Mod.	Obs.	Total Shops	Mod. %	Semi. %	Obs. %	Overall %
Rundle	86	77	21	184	47	42	11	68
Hindley	41	58	22	121	34	48	18	58
Grenfell	28	18	20	66	43	27	30	56·5
Pirie	14	29	17	60	23	48	29	47
Weymouth	5	27	11	43	12	63	25	43·5
Flinders	7	31	12	50	14	62	24	45
Franklin	4	21	8	33	12	64	24	44
Grote	0	33	4	37	0	89	11	44·5
Gouger	18	46	25	89	20	42	28	41
King William	27	77	21	125	22	61	17	52·5
Pulteney	19	48	34	101	19	47	34	44·5
Totals & Avge.	249	465	195	909	27	51	22	52·5

Streets with less than 30 shops have been excluded as not primarily shopping centres. These include Currie, Wakefield and Angas Streets. Gawler Place was also excluded as comparable to the "little streets" of Melbourne.

HOBART.

Area bounded by Warwick, Macquarie, Campbell and Barrack Streets. Survey was taken December, 1957.

Street	Mod.	Semi-Mod.	Obs.	Total Shops	Mod. %	Semi. %	Obs. %	Overall %
Murray	30	18	17	65	46	28	26	60
Collins	25	21	12	58	43	36	21	61
Liverpool	104	31	21	156	67	20	13	77
Macquarie	15	4	4	23	60	20	20	70
Argyle	9	3	8	20	45	15	40	53
Bathurst	11	12	6	29	38	41	21	55
Harrington	5	10	17	32	16	31	53	32
Elizabeth	121	30	24	175	69	17	14	78
Totals & Avge.	320	129	109	558	57	23	20	68·5

Streets with less than 20 shops excluded include Campbell and Brisbane.

Large Provincial Towns.

With the towns in the 91 to 300 shops bracket the proportion of modern averages 61 per cent. where buildings are exempt to 34 per cent. where they are taxed. The obsolete proportion for the former is only 15 per cent. compared to 29 per cent. for the latter.

There is great range between the individual towns in this category. Of those taxing buildings, Shepparton (61 per cent.) is the only one to have as high a percentage of modern as the average (61 per cent.) of the 40 towns exempting buildings. On the other hand, no fewer than 12 of those exempting buildings have more than 80 per cent. in the modern bracket.

Of those taxing buildings only Shepparton and Swan Hill had less than 10 per cent. of "obsolete" shops. This compares with no less than 18 of the whole 40 exempting buildings.

It is interesting to note that of the 22 towns taxing buildings 9 had recently or since changed their policy to exempt buildings. The position disclosed in the survey is the cumulative result of the policy of taxing buildings in previous years. These nine towns are: Ararat, Benalla, Castlemaine, Mildura, Sale, Swan Hill, Wangaratta, Warrnambool, Wonthaggi.

Shop Surveys in Capital Cities.

MELBOURNE.

Area bounded by Spring, Queen, Flinders and Victoria Streets. Survey was taken in July, 1957.

Street	Mod.	Semi-Mod.	Obs.	Total Shops	Mod. %	Semi. %	Obs. %	Overall %
Exhibition	28	37	7	72	39	51	10	65
Russell	15	43	23	81	19	53	28	42
Swanston	103	50	7	160	64	31	4	79·5
Elizabeth	132	78	8	218	60	36	4	75·5
Queen	2	26	8	36	6	72	22	42
Flinders	27	29	3	59	46	49	5	70·5
Collins	77*	46*	2	125	62	38	2	81
Bourke	60	84	22	166	36	51	13	61·5
Lonsdale	21	40	25	86	24	47	29	47·5
Latrobe	6	23	7	36	17	64	19	49
Totals & Avge.	471*	456*	112	1,039	45	44	11	67

The "little streets" (which could not be expected to have full cantilever verandahs with their narrow width), and those with a total of less than 30 shops have been excluded from the above.

* Shops in the section of Collins Street between Russell and Spring Streets (50)—where cantilever or any verandahs are prohibited under by-law—have been counted as Modern due to the restriction though otherwise classed as Semi-Modern under terms of survey.

SYDNEY.

Area bounded by Circular Quay, George Street, Macquarie Street (and extension College Street and Wentworth Street, Pitt Street to intersection with George and to Quay Street. Survey was taken in November, 1956.

Street	Mod.	Semi-Mod.	Obs.	Total Shops	Mod. %	Semi. %	Obs. %	Overall %
George	294	9	0	303	97	3	0	98·5
Pitt	240	21	0	261	92	8	0	96
Castlereagh	124	27	5	156	80	17	3	88·5
Elizabeth	111	12	3	126	88	10	2	93
Goulburn	42	4	0	46	91	9	0	95·5
Liverpool	60	2	0	62	97	3	0	98·5
Bathurst	30	4	3	37	81	11	8	86·5
Park	21	0	0	21	100	0	0	100
Market	29	0	0	29	100	0	0	100
King	47	0	0	47	100	0	0	100
Hunter	30	6	1	37	81	16	3	89
Hay	17	3	0	20	85	15	0	92·5
Campbell	36	1	1	38	94	3	3	95·5
Totals & Avge.	1,081	89	13	1,183	91	8	1	95

Streets with less than 20 shops have been excluded (these include Martin Place, Phillip Street, Rawson Place and Macquarie Street).

LAUNCESTON.

Area bounded by Elizabeth, Tamar, Margaret Streets and Esplanade and along Wellington Street to Westbury Street. Survey was taken December, 1957.

Street	Mod.	Semi-Mod.	Obs.	Total Shops	Mod. %	Semi. %	Obs. %	Overall %
Elizabeth	20	6	12	38	53	16	31	61
York	7	9	13	29	24	31	45	40
Brisbane	79	14	6	99	80	14	6	87
Cameron	1	9	10	20	5	45	50	28
Tamar	3	14	6	23	13	61	26	44
George	33	21	15	69	48	30	22	63
St. John	42	7	3	52	81	13	6	88
Quadrant	23	2	0	25	92	8	0	96
Charles	65	18	16	99	66	18	16	75
Wellington (to Westbury)	38	20	39	97	39	21	40	50
Totals & Avge.	311	120	120	551	56	22	22	67

Streets with less than 20 shops excluded include Cimitiere, Kingsway and Patterson.

Shopping Centre Survey.—Summary.

(A) Where Municipalities Exempt Buildings and Improvements from Local Taxes (U.C.V.).

Size of Town	Number of Towns	Total Shops	Average No. per Town	Percentage of: Modern	Semi-Modern	Obsolete	Overall Modernization
1. Over 300 Shops	5	2,822	564	85	13	2	91·5
2. Between 91-300	40	5,930	148	61	24	15	73
3. Between 41-90	45	2,699	60	56	25	19	68·5
4. Between 21-40	28	846	30	44	24	32	56
5. Between 5-20	29	309	11	22	20	60	32

(B) Where Municipalities subject Buildings and Improvements to Local Taxes (N.A.V.).

Size of Town	Number of Towns	Total Shops	Average No. per Town	Percentage of: Modern	Semi-Modern	Obsolete	Overall Modernization
1. Over 300 Shops	7	4,443	635	37	38	25	56
2. Between 91-300	22	2,955	134	34	37	29	52·5
3. Between 41-90	52	3,166	60	27	33	40	43·5
4. Between 21-40	46	1,390	30	20	27	53	33·5
5. Between 5-20	79	889	11	13	16	71	21

Percentage of Overall Modernization is taken as Sum of the Percentage Modern (which have both stages of Modernization), plus half the Percentage Semi-Modern (which have only one stage of Modernization). This gives a Single Percentage indicative of the position for the Group.