



# Planning for retail resilience: Comparing Edmonton and Portland



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## ABSTRACT

Commercial retail areas within cities have traditionally not only satisfied the demands for various goods and services, but have also contributed to elements of community sustainability and livability as a form of public good. Since the end of World War II, innovations in retail formats have occurred as retailers seek to maximize their financial efficiency. However, this often has consequences for community sustainability and livability. This research employs resilience theory to examine how cities have coped with retail innovations through a comparative case study of Edmonton (Alberta, Canada) and Portland (Oregon, USA). Through historical document review and interviews with senior planners in both cities, it is found that adaptive retail management which *emphasize principles over visions*, which feature *an active, informed, and highly organized public and a polycentric planning system encouraging planning diversity and consensus building* can contribute to more resilient retail outcomes that preserve a broader range of retail and public functions.

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## 1. Introduction

From the early 20th century to the end of World War II, retail development in most North American cities consisted of a retail hierarchy involving a vibrant downtown, commercial streets located in streetcar suburbs, and a distribution of small neighbourhood stores (Alexander & Akehurst, 1999; Architectural Forum, 1943). A wave of post war innovations in retail form as well as influences from the emergence of rational comprehensive planning resulted in the rise of indoor shopping malls and large format grocery retailers (Duany, Plater-Zyberk, & Speck, 2010; Gruen & Smith, 1960; Guy, 2007; Kramer et al., 2008; Thomas & Bromley, 2003). The *planned retail hierarchy* that emerged to control retail form and distribution during this period sought to reflect the transition to a 'modern' auto based society with an emphasis on an efficient distribution of retail centres based upon central place theory. (Dennis, Marsland, & Cockett, 2002; Gibbs, 2012; Hodge & Gordon, 2013; Kramer et al., 2008). In line with rational comprehensive planning rooted in the hierarchical distribution theories of Christaller (1933), Lösch (1940), and Berry & Garrison (1958), the notion was that this new hierarchy would represent an ideal urban distribution of retail locations that would be longstanding in the new automobile era (Abbott, 1983; Architectural Forum, 1943; Duany et al., 2010; Gibbs, 2012; Hodge & Gordon, 2013; Moses, 1970).

In time, this pre-defined, spatially distributed, hierarchy of specific retail formats was challenged by the rise of new retail formats, market developments, urban decay, and significant shifts in planning approaches. This comparative case study examines how two

metropolitan areas,<sup>1</sup> Edmonton (Alberta, Canada) and Portland (Oregon, USA), have coped with these changes since WWII. It does so through developing and employing the concept of *retail resilience* and its relevance to community sustainability at a metropolitan scale.

The research involved the collection and analysis of related planning and policy documents, council meeting minutes, and print news media. Additionally, fifteen semi-structured interviews were carried out with planners and councillors who were instrumentally involved in the planning process during the periods investigated. Site visits to key locations were also made. A qualitative analysis of this material employing both open and axial coding in an explanation building framework was employed (Yin, 2014). It should be noted here that the phrase "retail planning system" is used here to refer to all processes and stakeholders affecting planning decisions, not only the formal planning agencies within cities.

The primary goal for this research is to explore how a retail planning system can influence retail resilience. In the paper, the concept of retail resilience is reviewed and further defined, with specific focus on the roles of retail functions and retail formats. This is followed by a comparative case study on Edmonton and Portland, reviewing the post-WWII retail development and planning history in both cities, and identifies how they have reacted to the major violations of their retail plans. The

<sup>1</sup> Unless particularly explained, the term "metropolitan" used in this research is not intended to include rural area. In Canada and USA, the term "Census Metropolitan Area" includes both urban and rural areas. Though the boundary between urban and rural areas was ambiguously interpreted by different methods, it was suggested that the "Population Center" defined by Statistics Canada and the administrative boundary of Metro (the regional government headquartered in Portland, OR, USA) delineated acceptable urban areas within the Census Metropolitan Areas of both case cities.

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major differences of the two retail planning systems and their impact on retail reliance are then presented.

## 2. The concept of retail resilience

In his seminal work on ecosystem resilience, [Holling \(1973\)](#) conceptualizes resilience as the ability of systems to absorb changes and still persist through adaptation. He contrasts it with the concept of stability which emphasizes the ability of a system to return to its previous state after disturbances. Since Hollings original work, resilience has increasingly been recognized as a key element of sustainability ([Folke, 2006](#); [Holling, 2001](#); [Scheffer, Carpenter, Foley, Folke, & Walker, 2001](#)).

While Holling's work focused on natural systems, the notion of stability as a goal has also been critiqued in the social sciences as uncertainty, risks, adaptation and complexity can be regarded as fundamental elements of society ([Giddens, 2009](#); [Ostrom, 2005](#); [Harvey, 1973](#); [Beck, 1992](#); [Tuan, 1979](#)). In response, the concept of resilience was adapted to the social sciences, first in relation to resource management ([Adger, 2000](#); [Folke, 2006](#); [Holling, 2001](#); [Lu & Stead, 2013](#)), then to natural disasters ([Allan & Bryant, 2011](#); [Campanella, 2006](#); [Goldstein, 2012](#)), and then to managing socio-economic crises and generating sustainability ([Lang, 2012](#); [Martin, 2012](#); [Raco & Street, 2012](#); [Young, 2011](#)). In this latter group, [Martin \(2012\)](#) emphasized the notion of *adaptive resilience*, emphasizing the ability of complex systems to anticipate or recognize shocks and to intentionally adapt or reorganize.

In recent years, the concept of *retail resilience* has been developed ([Dobson, 2015](#); [Barata-Salgueiro & Erkip, 2014](#); [Fernandes & Chamusca, 2014](#); [Kärrholm, Nylund, & Prieto de la, 2014](#)). It has been defined as “the ability of different types of retailing at different scales to adapt to changes, crises or shocks that challenge the system's equilibrium, without failing to perform its functions in a sustainable way” ([Fernandes & Chamusca, 2014, p. 2](#)).

### 2.1. Retail functions

To employ the above definition, it is necessary to understand the *functions* of retail within a city. [Kärrholm et al. \(2014\)](#) seeks to capture a spectrum of retail functions in noting that retail areas must not only “respond sustainably to the needs, wants and desires of different users, consumers and investors”, but also “be part of a structure enabling resilient everyday life”. It could be said that well-functioning retail systems include both the *private exchange function* of facilitating economic exchanges of goods and services in an efficient manner, and the *public good function* of contributing to a number of collective priorities ([Dobson, 2015](#)). These include contributing to neighbourhood sustainability, generating a unique sense of place, ensuring access to goods and services for a diverse population, and supporting environmentally sustainable and healthier lifestyles ([Duany et al., 2010](#); [Francis, Giles-Corti, Wood, & Knuiman, 2012](#); [Giddings, Charlton, & Horne, 2011](#); [Greenburg, 2012](#); [Jacobs, 1961](#); [Kirby, 2008](#); [Miles & Song, 2009](#); [Sandercock & Dovey, 2007](#); [Zukin, 2010](#)). This does not suggest that every retail outlet must support all of these functions, rather that the entire retail system within a region should address these factors in a manner consistent with societal goals.

### 2.2. Innovations in retail format

The latter half of the 20th century presented a series of innovations in retail formats ([Gibbs, 2012](#); [Guy, 2007](#); [Jones & Doucet, 2000](#); [Kotin & Peiser, 1997](#); [Kramer et al., 2008](#); [Levy, 2011](#); [Marston & Modarres, 2001](#)). The first, discussed in the introduction above, was the post war development of large supermarkets and regional and neighbourhood shopping centres. At the time, planners saw the widespread adoption of the automobile and the proliferation of indoor malls as the “new normal” and the new ideal planned retail hierarchy as an adaptation into a new stable form of development. Changes in retail form

continued, however, with the rise of large format (big box) retail stores along arterial roadways, strip malls as neighbourhood centres, power centre<sup>2</sup> agglomerations, lifestyle centres,<sup>3</sup> and others. These changes involved streamlining the logistical processes for retailers, and the massive retail agglomerations in power and lifestyle centres became attractive to consumers with access to automobiles.

### 2.3. Innovations in planning

Innovations in planning approaches also took place during this period. New planning ideals arose in many cities to challenge the post war planned retail hierarchies. These included Transit Oriented Development (TOD), Smart Growth, New Urbanism, Complete Streets, and others ([Baker & Wood, 2010](#); [Deitrick & Ellis, 2004](#); [Duany et al., 2010](#); [Fernandes & Chamusca, 2014](#); [Grant, 2002](#); [Hall, 2002](#); [Lowe, 2005](#); [Ratner & Goetz, 2013](#); [Tsou & Cheng, 2013](#)). These were built upon a greater awareness of the public good functions of retail outlets than previous approaches to planning. They promote greater density around TOD stations, the reintegration of uses (mixed use development), and more complete streets and neighbourhoods integrating corner stores (for example) back into the urban fabric.

There were also changes in the approach to planning with the move towards greater levels of public involvement ([Abbott, 1997](#); [Innes, 2004](#); [Innes & Booher, 2004](#); [Murtagh, 2004](#); [Porter, 1997](#); [Robinson, Shaw, & Davidson, 2005](#)). First such efforts were focused on residential developments, but engagement became increasingly important in commercial shopping developments with the notion that effective cooperation between stakeholders with vastly different interests could lead to better retail development ([Frieden & Sagalyn, 1991](#); [Dawson & Lord, 1985](#)). Later, it will be seen that this transition was an important factor in the rise of resilience in one of the cases introduced.

## 3. Case comparison

Edmonton and Portland were selected as cases for this research as both cities are prominent in the post-WWII retail planning history of North America. Prior to the 1980s, Edmonton was a leading North American city to embrace modern rational comprehensive planning in adopting a strong comprehensive plan emphasizing a planned retail hierarchy ([Smith, 1995, Smith, 1991](#)). Portland has built up its reputation as a leading city in areas of sustainable retail development and urban planning ([Abbott, 1983, 1997](#)). It is worth noting that beginning in the 1980s, the retail planning of Portland was similar to the hierarchical model developed decades earlier in Edmonton, however as will be shown in the paper, differences in the two cases have led to different outcomes.

### 3.1. Case profiles

The City of Edmonton (Population: 812,201; Land Area: 684.37 km<sup>2</sup>) retains roughly 70% of the Census Metropolitan Area (CMA, Population: 1,159,869; Land Area: 9426.73 km<sup>2</sup>) ([Statistics Canada, 2013](#)) (see [Table 1](#)). In 2008, the Capital Region Board (a regional NPO consisting of 24 municipalities that cover the Edmonton-CMA), was established by the provincial government of Alberta. The City of Edmonton has all of the authority over zoning and development approval within their boundaries and the vast majority of major retail developments are within its boundaries.

<sup>2</sup> Power Centres are retail agglomerations, typically of detached stores sharing parking lots with more than 23,000 m<sup>2</sup> of gross leasable space and most often containing multiple big box retailers.

<sup>3</sup> Lifestyle centres are commercial or mixed use shopping centres that provide leisure amenities targeted towards upscale consumers. They typically consist of mid-sized upper scale chain stores.

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