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Te Warewhare:

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The socio-economic impact of "big-box" retail on small town life is widely assumed to be negative. This research finds a more complex relationship that is influenced by ethnic and historical contexts. How much do we really know about the impact of the rapidly changing retail landscape on our communities?

The Warehouse Group's "Red Sheds" have become familiar landmarks across New Zealand. The Warehouse Group (TWG) has grown from one Auckland store in 1982 to New Zealand's largest general merchandise retailer in 2008 with a network of over 80 stores nationwide from Invercargill to Kaitaia. Other local "big-box" retail chains have limited themselves, to date, to larger urban areas and therefore The Warehouse has borne the brunt of New Zealand's version of the global backlash characterised as the "anti-Wal-Mart" phenomenon. While nowhere near the size of any of the big box retailers in the USA, TWG's commercially successful strategy of expansion into smaller communities has led to characterisations of the company as the "shop that ate New Zealand".[1] Research into the impact of big-box retail exists elsewhere[2], but in New Zealand the critiques of TWG are based largely on anecdote, with parallels assumed between Wal-Mart and The Warehouse.

Rather than canvass the myriad criticisms levelled at TWG, and big-box retail in general, this paper explores one particularly distinctive finding from studies conducted on the impact of The Warehouse stores in Kaitaia, Kerikeri and Motueka during 2004.[3] Existing studies of big box retailing, in New Zealand and overseas, are largely devoid of analysis by ethnicity. In order to start to redress this, TWG agreed that consultation with Māori organisations and individuals is essential to understand the social impacts its stores have in small towns and rural areas. This paper looks specifically at Māori as consumers and, to a more limited extent, as employees of The Warehouse: how they feel about the Big Red Shed and what they perceive The Warehouse offers them in terms of shopping and employment opportunities, and importantly how this contrasts with other ethnic groups.

The challenge of big-box retail

The challenges posed by Wal-Mart's expansion into small town America are well known in the business press, academic literature, populist books, and even as the subject of two award-winning documentaries. Many aspects of Wal-Mart's operations (and implicitly other large format retailers) have been part of a revolution in "global retailing", potentially accounting for significant productivity gains in the USA. The perceived downside of big-box retailing is multi-faceted; opponents even claim these retailers increase the local costs of policing.[4] The single most common argument against large format retailers was encapsulated in *Business Week*: Wal-Mart's huge advantages in buying power and efficiency force many local rivals to close. For

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every Wal-Mart supercenter that opens in the next five years, two other supermarkets will close.[5]

This paper forms part of the "comprehensive research"[6] called for by critics of big-box retail in New Zealand, without presupposing that independent research will verify any "disastrous impacts" and that local communities inevitably can / will / should resist big-box retailers.

Indeed, for some towns and some competitors, the advent of a big-box store has had positive effects: "...observational and anecdotal evidence...suggested that additional traffic generated by the entry of a Wal-Mart store boosted sales in stores carrying upscale clothing, upscale shoes, upscale gifts and upscale jewellery." [7]

A further way to understand the more positive orientation of Māori to The Warehouse is to see shopping as a practice rather than as "consumption".

Conceptualising links between ethnicity and consumption

The larger research project, commissioned by The Warehouse, was conducted between 2001 and 2006, and has covered conventional stake-holder perspectives on the impact its stores were having on local businesses and local shopping. Unsurprisingly, there was varied opinion about the positive and negative impacts of having a big-box retailer in town. Local competitors largely adapted to TWGs presence in similar ways to Wal-Mart competitors: "Speciality stores [should] differentiate themselves from discounters by increasing product assortments ... [and] upgrading quality." [8]

In 2004 the consultants successfully argued that TWG should consider adding a focus on Māori given their significance as stakeholders in small town New Zealand. The results of the research, reported next, show that Māori have a more positive orientation to The Warehouse than the non-Māori population across a range of quantitative and qualitative indicators.

How could existing research explain this finding? Cost factors are relevant, but issues to do with ethnicity also need to be canvassed. Marketing has traditionally identified ethnicity (along-side other socio-demographic features such as age and gender) as a factor explaining buying behaviour. Relevant research in the USA has mainly concentrated on "visible minorities" and their relationship(s) to consumption. [9]

The marketing literature has also defined "intentional" or "tribal" communities which are groups of people who come together in "communities of interest".[10] However, marketing tends to define these 'tribal' communities by their relationship to commodities. Researchers in this field do not see 'tribal' communities as pre-emptive of behaviour, but rather as an outcome of consumption. This explanation is not sufficient to explain Māori perceptions of The Warehouse; their cultural practices predate discount

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"Moonlight Meal"
Orewa Beach, Rodney District
March 2008

retail stores. Māori belong to a distinct culture that is defined geographically, culturally, historically and by ethnicity.

A further way to understand the more positive orientation of Māori to The Warehouse is to see shopping as a practice rather than as "consumption" per se.[11] This approach recognises contestation, appropriation, exclusion and use, and at least recognises that Māori have appropriated The Warehouse as a social and cultural place rather than merely using it as a site to purchase goods. We discuss this way of understanding our results later in this article.

Methods

This report presents only the results of Māori consultation from the research conducted in Kaitaia, Kerikeri and Motueka which involved three main methods:

1. **Key informant interviews**
   Visits to local rūnanga and iwi organizations were made in each location to interview key members from the Māori community. Five Māori employees were also interviewed: three at the Kaitaia store and two at the Motueka store.
2. **Focus groups**
   Focus group discussions were held with Māori trainees, staff, trustees, and residents of marae.
3. **Random telephone survey of households**
   Telephone interviews of roughly 200 households were conducted in each of the three towns, identifying Māori and other respondents. In all, 144 people self-identified as Māori, or mixed European/Māori, Asian/Māori and Pacific Islands/Māori ancestry:

Māori made up 23% of the sample of 627 people interviewed, which is a higher proportion than the representation of Māori in the population as a whole (see table 1). Sixty-nine percent of our respondents were European and 7% were "other", including a number who listed New Zealander or Kiwi as their ethnic background.

A key theme to emerge from consultation with Māori was how different life was for them (and other low income families) before The Warehouse came to town.

The proportion of Māori households interviewed was higher than their representation in the 2001 Census in Kerikeri and Motueka, whereas the sample fell short of the level of Māori representation in Kaitaia. The household survey reached 50 Māori households or 22% of those interviewed in the Waipapa catchment which includes Kerikeri and the area north of the town where the store is located, 9% in the Tasman District (18 households), and 38% in the Kaitaia catchment (76 households).

Participants in the household telephone surveys and the Māori focus groups were not asked questions about their household income, and therefore we do not have direct measures of economic status on which to compare the Māori and non-Māori samples. However, a number of comments amongst participants suggest that either the specific respondent considered him or herself, or the local Māori communities of which he/she is a member, to be generally lower income than on average for the area. More generally, information from Statistics New Zealand suggests that average income amongst Māori (across New Zealand rather than in the specific towns under study) is lower than of New Zealanders of European descent.[12]

Table 1: Ethnic Diversity in New Zealand

	Kaitaia	Kerikeri	Tasman District	New Zealand
European	61.4%	91.3%	96.2%	80.1%
Māori	52.0%	12.8%	7.0%	14.7%
Pacific Peoples	3.3%	1.2%	0.6%	6.5%
Asian	1.7%	2.0%	0.9%	6.6%
Other	0.4%	0.5%	0.2%	0.7%

Source: Statistics New Zealand 2001 Census

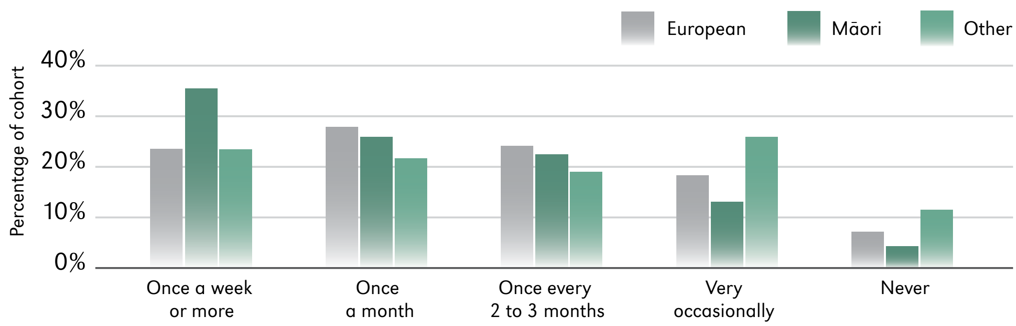
Life before The Warehouse came to town

A key theme to emerge from consultation with Māori was how different life was for them (and other low income families) before The Warehouse came to town. One person in Kaitaia went so far as to say that before The Warehouse arrived, local retailers "have dicked people for years...shafted the locals through high prices, poor service, etc." The Warehouse is seen as a place where Māori can afford to buy new goods rather than second-hand goods. One Māori key informant suggested The Warehouse "gives lower income people the opportunity to access new stuff at an affordable price." In Motueka, an interviewee said: "Finally things are affordable. Before [The Warehouse] most shops in Motueka were too dear. We would go to Nelson...we would have a day out in Nelson."

The view was also strongly held that the Kerikeri CBD does not, in general, cater to lower income people. One key informant said: "Our (Māori) perspective is that shopping in Kerikeri is priced out of our range. Most families have not had the opportunity to buy brand new clothes, etc. but they can at The Warehouse." Key informants in Kaeo suggested: "Kerikeri has developed a reputation that it has higher prices...and no doubt local Māori shop at The Warehouse in Kaikohe" (prior to the opening of the Waipapa store).

Key informants in both Motueka and Kaitaia commented that second-hand stores are not always cheap and are very hit-and-miss in terms of finding desired items at the right time.

Figure 1 Frequency of Shopping at The Warehouse (by ethnicity)



The views expressed contrast sharply with the very common nostalgic view that comes across in discussions of small town life throughout the world, and especially in regard to the impact of big-box retail. For example, a telling scene in "Store wars" shows a local shopkeeper answering her husband's inquiry about a customer's bill and requesting that he ask about the customer's family member who has been ill. This folksy touch, contrived or unplanned, survived the editing process to make the point that unlike big-box retailers, local independent retailers are "part of the community". This imagery is at odds with the complex patterns of social inclusion and exclusion experienced by Māori in small town New Zealand.

Analysis of Māori as shoppers

Māori very keenly patronise The Warehouse in each of the three sites studied in 2004. A focus group member in Motueka said, "Many of the local Māori families would be shopping at the Warehouse two to three times per week." The 144 Māori households surveyed across the three towns were more likely to be regular shoppers at The Warehouse than people of other ethnicities: 35% of the Māori respondents go to The Warehouse on at least a weekly basis, compared to 23% of either Europeans or people of other ethnicities (Figure 1).

Those people (interviewed by phone) who said they never shop at The Warehouse almost all lived in Kerikeri, Keao or Russell. At the time, the Waipapa store was under construction and so these people would have had quite a long journey to Kaikohe or Whangarei to shop at The Warehouse. Only six out of the 144 Māori respondents (4% of the Māori sub-sample) had not shopped at The Warehouse in the last 12 months, compared to 7% of Europeans and 11% of "Other" ethnicities.

Looking at the individual sites, the evidence from the 228 Kerikeri and Kaeo households surveyed shows that Māori (Figure 2) shopped at The Warehouse on a more regular basis than European or "other" residents of the area. Twenty-four percent of Māori respondents shopped at The Warehouse at least once a month (22% at least once a week and 2% once a month) even though it meant travelling to Kaikohe. Only 15% of European respondents made the journey to Kaikohe to shop

Figure 2 Frequency of Shopping at The Warehouse Kerikeri (by ethnicity)

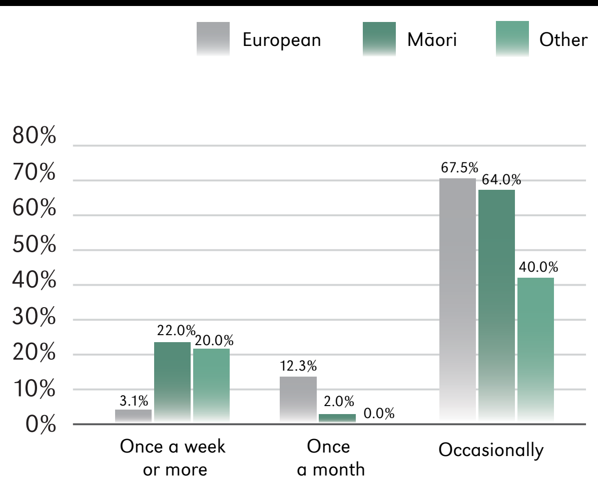


Figure 3 Frequency of Shopping at The Warehouse Kaitaia (by ethnicity)

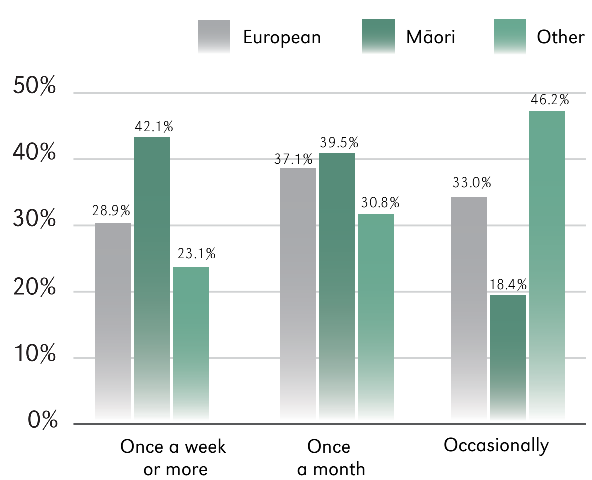
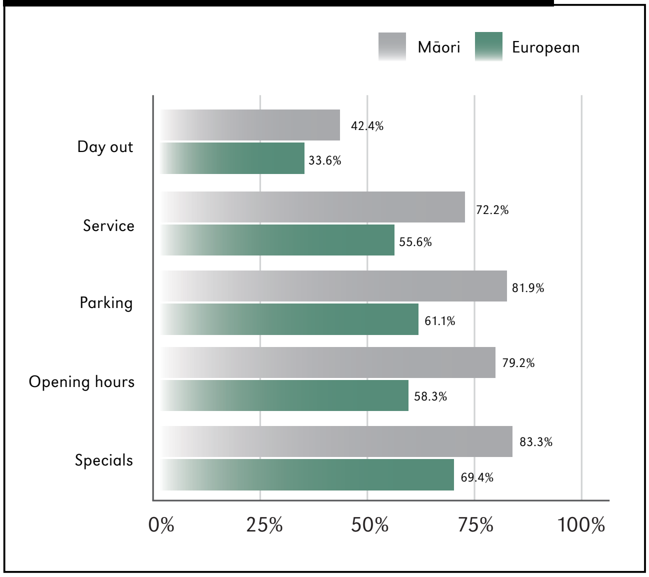


Figure 4 Reasons for Shopping at The Warehouse



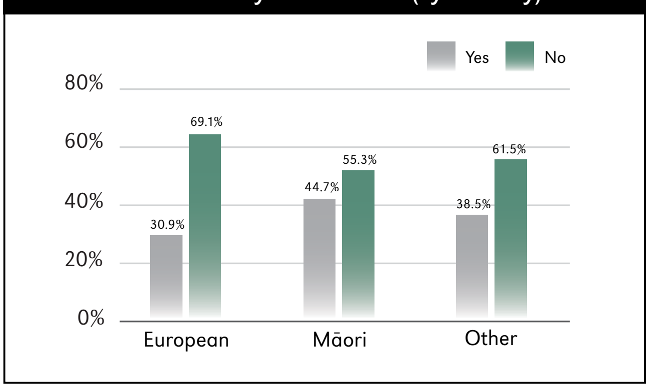
at The Warehouse at least once a month. The distance and effort required is reflected in the very high percentages of all ethnicities who only occasionally shopped at The Warehouse before the Waipapa store opened.

Contrast this with Kaitaia (Figure 3), where 42% percent of Māori respondents shopped at The Warehouse at least once a week and a further 40% of Māori went once a month. The corresponding figures amongst European respondents was 29% and 37% respectively. All nine members in the Māori focus group held in Kaitaia regularly shopped at the Warehouse (on average once a week).

The sample in Motueka is too small (just 18 households) to generalize and so separate results are not reported here.

Māori also shop at The Warehouse through their marae and iwi-based organisations. This is a special feature of the relationship between Te Warewhare and Māori in small towns. In Kaitaia

Figure 5
The Warehouse as a day out in Kaitaia (by ethnicity)



at least one Māori Trust Board held an account with The Warehouse which allowed it to place purchase orders. At the time of our research, all the rural marae in the Kaitaia catchment held accounts with The Warehouse that enabled them to place orders and receive discounts. In Motueka, another Māori Trust Board was able to get a 5% reduction on business transactions.

Informal practices also existed alongside more formal account-holding relationships. One Kohanga Reo reported that although they did not have a business account with The Warehouse, they did use The Warehouse regularly in an informal manner for supplies. A representative said during the focus group: "We buy lots of stuff for the Kōhanga at the Motueka Warehouse: toys, colouring pens, stationery – anything that helps our tamariki learning."

One marae near Kerikeri had just bought all its linen from The Warehouse after negotiating a deal with management. Another comment was that before The Warehouse came to Kaikohe, marae in the eastern side of the Far North District would deal directly with manufacturers and importers in Auckland to get better prices.

Reasons for shopping at The Warehouse

The household survey asked people to identify why they shopped at The Warehouse (see Figure 4). Shoppers, regardless of ethnicity, identified low prices as the main reason.

Māori shoppers are more likely to consider the advertised specials as a reason why they shop at The Warehouse. Some key informants commented that Māori use specials to bulk-buy for extended family. One key informant interviewed in Motueka suggested that Māori from rural areas were particularly upset that specials were often sold out before they had a chance to drive into town.

Overall, Māori were also more likely to view going to The Warehouse as part of a day out (42%) than Europeans (34%), especially if they travelled a long distance to get to town. This was a recurring theme in both Kaitaia and Motueka: The Warehouse acts as a social venue and the trip to the store is an event. Many Māori interviewed in Kaitaia said that Māori families from the rural area regularly come into The Warehouse for a Saturday out, in combination with a trip to the flea market (located in the car park next to The Warehouse), to McDonald's (for lunch), and to Pak'n'Save (for groceries). Forty-five percent of Māori (34 of 76) respondents suggest they see a visit to The Warehouse as part of a day out in Kaitaia, compared to 31% of European respondents (30 of 91).

A number of Māori respondents suggested that the informal atmosphere in The Warehouse made Māori feel at home there. One person said: "there are areas where kids can go and be safe while you go off and get things." Others suggested that they would often run into friends/family at The Warehouse and would even go there to socialise: "The Warehouse is very social. You meet people down every aisle."

The theme that The Warehouse is a social gathering place and a destination for a day out expressed in Kaitaia is echoed in Motueka. One respondent claimed: "It's a meeting place…[there's] not much to do on weekends in Motueka – so it's a social thing."

Until July 2004, for households in the Bay of Islands and north to Kaeo, the nearest The Warehouse store was in Kaikohe. For some, a trip to Whangarei may have been as attractive as going to Kaikohe. There was relatively little difference between Māori and European respondents going to The Warehouse as part of a day out: 38% versus 35%.

Employment opportunities

The chance of employment at The Warehouse, and its absence in the traditional retail sector, is also a recurring theme for Māori in each of the locations visited. One key informant in Kerikeri suggested that there are many more Māori employees evident in The Warehouse than in the retail sector generally, and emphasised: "compare it to the supermarket".

Nor do Māori tend to own small retail businesses in the towns under study. Many Māori have considered the possibility of attracting The Warehouse as a tenant to anchor the development of Māori-owned land. One key informant in Kaeo said: "When discussions were taking place about a Kerikeri store, Māori were keen to have it in the area, and as close as possible – it would have been a good investment for Māori people." In Motueka, the Ngāti Rārua Ātiawa Iwi Trust (NRAIT) has made the idea a reality by building and siting The Warehouse on Māori land. NRAIT believed the move would give local Māori families a chance at local employment, and indeed in 2004 at least five current staff in the store were Māori.

Three Māori employees of the Kaitaia store and other key informants were interviewed as part of the consultation. There was a unanimous opinion that The Warehouse was a better employer than other local large retailers. Several people, employees and key informants, suggested that friends had moved from the local department store and supermarket to The Warehouse, or wanted to do so. One employee was particularly impressed by the speed at which she was promoted within the system and compared her experience with her previous job in a national fast food chain: her starting hourly wage at The Warehouse was higher than her pay as a supervisor at the latter. All three employees interviewed agreed that ethnicity was not a barrier to advancement in The Warehouse, and all looked forward to moving up within the company. Two key informants commented on the availability of internal training from The Warehouse but suggested that, while it was useful and valuable, it would be better if the training was accredited through New Zealand Qualifications Authority.

Māori in Kerikeri and Kaeo also looked forward to the prospect of jobs in The Warehouse once it opened in Waipapa – Kaikohe was considered too far for most Māori to travel for employment.

Two Māori Warehouse employees were interviewed in Motueka. Both felt that The Warehouse provided opportunities for advancement and that The Warehouse was a good employer. One employee was currently in a supervisory position (having previously worked in the Nelson store) and was shortly to take up a management position in another Warehouse store closer to her family in the South Island. The other employee was clear that she did not want to move from Motueka and so recognised that further opportunities for advancement were likely to be more limited. Neither saw lack of formal educational achievement in school as a barrier to advancement at The Warehouse and both employees said that a positive attitude and a "willingness to put your hand up" for further opportunities were the prerequisites to move up in the organisation. Both were very positive about the "team" culture at The Warehouse and the ability for employees to get involved in decisions, for example about the charities and causes that the local store supported. Both noted that management was accessible and the working atmosphere was friendly.

> Overall, Māori were also more likely to view going to The Warehouse as part of a day out than Europeans, especially if they travelled a long distance to get to town.

Discussion and conclusion

The results reported in this paper strongly support the notion that Māori have a more positive orientation to The Warehouse than other ethnic groups across a number of indicators. Why would this be?

Of course the most obvious explanation of our results, at least on the surface, is that because Māori tend to have less disposable income, they are more likely to be "budget" shoppers, attracted to a store whose slogan is "where everyone gets a bargain". Budget shopping is almost certainly a factor as our results have shown, but this relationship cannot be only understood as budget shopping. It was very clear during our research, as we talked to participants, that the relationship that Māori have developed with The Warehouse is far more significant than merely an ethnic group budget shopping.

For example, Figure 4 reveals that 72% of Māori surveyed picked "good customer service" as a reason why they shopped at The Warehouse, compared to 56% of Europeans. Now consider this finding in light of one of the primary critiques of big-box retail: "While shoppers seem to uniformly appreciate the often lower retail prices available at the mass merchandisers, many also rue the loss of personalized customer service previously provided by friendly, local dealers." [13]

In contrast, we have hypothesised that Māori, for various reasons, have historically felt marginalised from small town retail consumption and employment opportunities, and this helps to explain their welcoming of The Warehouse into their communities at levels not experienced amongst respondents of other ethnicities. Comments by a number of key informants and residents suggest that The Warehouse is viewed as a comfortable and welcoming environment. One Māori woman commented in relation to other retail stores, "you always feel someone is watching you", intimating this related to her ethnicity. Another said: "I'd be much more careful about letting my children loose in Farmers." In part, these sentiments were related to the presence of Māori staff by the interviewees. In other cases, the environment itself signalled its "Māori-ness": each of the buildings NRAIT has built in Motueka, including KFC and The Warehouse, feature a Māori carving, as does the Waipapa store.

A final interpretation of our results suggests that Māori have appropriated The Warehouse into their culture in a very interesting way. This approach takes as its antecedent the ethnic community, rather than the company. Usually the international literature about ethnicity and shopping treats ethnic groups as target consumption groups. If we were to adopt this conventional perspective (i.e. a marketing view) then we could see The Warehouse as "adopting" or assimilating Māori into their "brand community". But, as inferred from the title to this paper "Te Warewhare", we suggest that rather than seeing the relationship we describe as a result of a "successful" marketing strategy, or even the result of historical exclusion from high street shopping, the more positive relationship we discuss in this paper is a result of Māori "shopping practice" which uses the material supplied by a retailer to express pre-existing culture.[14] This explanation for the positive relationship is at least true to the research participants' cultural practices. And, it does not become ensnared in the "big-box retail debate", centred in the USA around Wal-Mart, which is infused with romantic and nostalgic ideas about what constitutes a community.

What this approach emphasises is the value of looking at consumption and employment in relation to practice, power, and historical contexts.

What this approach emphasises is the value of looking at consumption and employment in relation to practice, power, and historical contexts. In short, we should not make universal assumptions about the impact of retail development on communities, particularly where issues of ethnicity are concerned. Critics of big-box retail paint a picture where the local "main street" is integral to the life of communities. However, this view of small town life is mythologised at least to some extent: although friendly neighbours may conduct much of their public life through shopping in the town's main street, in small towns there are patterns of exclusion and inclusion that are unremarked upon in both the international and New Zealand literature. Seeing the changing retail landscape through the lens of ethnicity pulls these patterns of exclusion and inclusion into view. We can say with some confidence from the results reported in this paper that the Disneyesque portrayal of small town life which forms the core of opposition to large format retailing overseas has almost certainly not been the reality for New Zealand's indigenous people.

A final interpretation of our results suggests that Māori have appropriated The Warehouse into their culture in a very interesting way. This approach takes as its antecedent the ethnic community, rather than the company.

The main implication of the present study is that we actually know very little about the impact of the rapidly changing retail landscape on Māori or non-Māori. Consequently, we have two suggestions for future research directions. First, New Zealand researchers need to pay more attention to how these changes are affecting the development of our communities. This issue is particularly urgent; there is little current research directly examining the changing face of retail in NZ towns and cities.[15] The rapid expansion of Westfield malls, for example, has been entirely ignored by researchers. We just do not know, at this point, how this expansion is affecting traditional high street-style shopping centres or the communities in which they are situated. Second, researchers need to delve deeper into the sociological issues underlying large format retail's movement into small towns - ethnicity being just one example. ■

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10. Variations on this theme include a 'brand community' (Muniz Jr., A. M., & O Guinn, T. C. (2001). Brand community, *Journal of Consumer Research*, 27(4), 412-432) or 'tribal community' (Cova, B., & Cova, V. (2002). Tribal marketing: The tribalisation of society and its impact on the conduct of marketing, *European Journal of Marketing*, 36(5/6), 595-620) or 'consumption community' (Bekin, C., Carrigan, M. and Szmigin, I. (2007). Communities and consumption (editorial). *International Journal of Sociology and Social Policy*, 27(3/4), 101-105).
11. For a discussion of shopping as a 'practice', see Warde, A. (2005). Consumption and theories of practice'. *Journal of Consumer Culture,* 5(2), 131-153 or Miller, D. (2001). *The dialectics of shopping.* Chicago: The University of Chicago Press.
12. The 2003 New Zealand Income Survey shows that average weekly income from employment for Māori was between $60 and $150 less than for the rest of the population, depending on age. Further, Household Labour Force Survey figures indicate that employment rates amongst Māori have lagged behind European/Pākehā employment rates by as much as 15% in the early 1990s and 8% in the early 2000s. These figures hide the distribution of income within the Māori community. See Statistics New Zealand (2003) New Zealand Income Survey June 2003 quarter.
13. This quote is from Boyd, B. W. (1997). 'Mom and Pop' to Wal-Mart: The impact of the Consumer Goods Pricing Act of 1975 on the retail sector in the United States. *Journal of Economic*, Issues (31), 223-232. It encapsulates a widespread imagery of the friendly helpful local shopkeeper, which is applicable to both the context of fading city centres he was writing about as well as small town Main Streets.
14. The contrast can be seen by comparing Berkowitz, D., Bao, Y., & Alaway, A. W. (2005). Hispanic consumers, store loyalty and brand performance, *Journal of Targeting, Measurement and Analysis for Marketing*, 14(1), 9-24 with Miller, D. (1998). *A theory of shopping*. Cambridge: Polity.
15. Very little research has been conducted and published on small town businesses, especially in New Zealand. One interesting exception is a study of Littledene conducted in the early 1930s and reported in Somerset, H. C. D. (1974). *Littledene, patterns of change*. Wellington: New Zealand Council for Educational Research. This landmark in New Zealand rural sociology parallels better known studies of Middletown, USA (see http://www.bsu.edu/middletown/) that date from the late 1920s.