

THE ECONOMIC AND EMPLOYMENT IMPACTS OF SHOPPING MALL DEVELOPMENTS ON REGIONAL AND PERI- URBAN AUSTRALIAN TOWNS

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ABSTRACT Shopping mall development in regional towns typically comes with the promise of increases in economic activity and local employment. In contemporary Australia they are often welcomed because of this, and the brands, chain stores, glamour and/or cheaper prices they bring. Nevertheless, there is a thesis that disputes these purported benefits. Advocates and defenders of endogenous dynamism and traditional town precincts argue shopping malls sideline local entrepreneurship and innovation with negative repercussions for local economic activity and employment. This research provides new empirical research into the short and long term effects of shopping malls on Australian regional towns. It does so by testing the claims of both shopping centre advocates and detractors by comparing ABS Workplace data before and after the opening of major malls in three Australia regional towns, and then between nine towns that have had either shopping malls or traditional town centres for over 20 years. The research showed no evidence of increases in economic activity over the short term following the opening of a major shopping mall and evidence of diminished economic activity and employment over the long term.

KEY WORDS: Shopping Malls, Towns, Retail, Employment, Activity Centres, Small Business, Australia.

1. INTRODUCTION

A major discourse in the wider discussion of sprawl, place and placelessness has been between the merits or otherwise of the shopping centre in its various manifestations in comparison to the traditional neighbourhood, town or civic commons, (traditional high streets, main streets, town and city precincts) (Childs 2004). In particular, the detrimental effects the opening of a new major shopping centre can have on the traditional commons and the businesses within

them (Kowinski, 2002; Staeheli and Mitchell, 2006; Dovey, 2010; Mitchell, 2006).

The shopping centre exists in three basic types. Shopping malls, neighbourhood centres of one or two anchor supermarkets and a few stores, and single store hypermarkets, superstores and bulky goods outlets. The latter two use a car park rather than a pedestrian environment as the primary organising element of uses and are functional environments, dedicated to the instrumental distribution of goods and to a lesser extent services (Casazza *et al.*, 1985). On the other hand, the mall offers an alternative to the instrumentality of the neighbourhood centre and superstore because it attempts to create pedestrian environments and destinations where the public can 'go shopping' rather than just 'do the shopping' in an environment offering personal and social attractions (Buttle, 1992).

One of the great successes of the mall has been its ability to use convenience and commercial arrangements to attract the most visited and profitable retailers, isolating them from the traditional commons and taking with them significant numbers of routine visitors (Kowinski, 2002; Reimers and Clulow, 2009). In doing so, they have left many of the secondary uses found in the traditional commons with reduced exposure to passing crowds and their viability subsequently weakened (Mitchell, 2006; Voyce, 2003 and 2006). In the United States, the birth place of the shopping mall, as early as the 1960s shopping malls were documented as having a devastating impact upon once thriving and dominant traditional commons, producing streetscapes of boarded up and decaying town centres, village centres, high streets, inner-city strips and even downtowns (Jackson, 1996; Kowinski, 2002).

Attitudes to the shopping mall and the traditional commons and the impacts of the latter on the former fall into two ideological camps. On one side, shopping malls are seen as modern forms responding to modern requirements of motor vehicle access, convenience and efficiency as well as postmodern desires for brands, the fashionable, and consumption as entertainment (Backes, 1997; Kowinski, 2002; Reimers and Clulow, 2009; Rybczynski, 2000; Staeheli and Mitchell, 2006; Williams, 1995). On the other, they are the destroyers of public places and the endogenous dynamism, pluralism and entrepreneurship that creates and evolves them (Brugmann, 2009; Dovey, 2010; Forsyth and Crewe, 2009; Mitchell 2006; Voyce, 2003).

A major plank of the discourse is the purported effects major shopping centre development has upon local retail businesses and employment, but also the economic health of the town as a whole. The opening of a major shopping centre typically comes with the promise of a net increase in employment and an overall boost for the economy of the town in which they establish. Thus, they are often welcomed into communities as employment generators and economic stimulators (Mitchell, 2006: Voyce, 2006: Ryan, 2006).

This research analyses both the short term and long term effects of shopping centre development in three case studies carried out in rural and peri-urban towns in New South Wales and South Australia. The first case study measures short term changes in local business activity and employment by comparing empirical employment data before and after the opening of major shopping malls in three regional towns. The analysis compared business sectors typically found within a shopping mall, retail, food and beverage, and personal services. The data used comes from the ABS 2006 and 2011 Census Workplace data.

The second case study is a comparison of employment and local business activity between four mid-sized regional towns, two which maintain traditional town precincts as their major activity centres, and two where shopping malls have been major commercial players for many decades. In this case, the data comes from the 2011 Census alone, and includes retail, food and beverage services, and personal services, but also secondary and ancillary support businesses likely to develop within an endogenous economy.

The final case study, is a comparison of employment in peri-urban settlements around metropolitan Adelaide, SA. Using the same data set as case study 2, this analysis compares five settlements that are geographically close to towns or outer suburbs of Adelaide with activity centres much larger than their own. Two of these settlements only have shopping centres as their activity centres, one shares retail and service activity between traditional precincts and a commercially dominant shopping mall, and two maintain commercially dominant traditional town commons.

By comparing these figures in these locations this research first shows that there was some loss of local business activity and employment immediately following the opening of a major shopping mall. It then shows there is significantly less local business activity and employment activity in settlements dominated by shopping malls for long periods compared to those where traditional town commons remained paramount.

2. THE MECHANICS OF THE MALL

Since their inception, the shopping mall has been praised and heralded as a modern version of both main street and the town square and praised and championed for its modernist principles of convenience, efficiency and order (Kowinski, 2002; Reimers and Clulow, 2009; Staeheli and Mitchell, 2006). Protagonists of this thesis argue the mall has improved the commons by merging its design elements with the tricks of Disneyland, knowledge of marketing, safety, and convenience. In this light, the demise and superseding of the commons was until the 1990s often welcomed, and the commons in all its forms was criticised by modernist planners in particular, because of its disorder, 'jangled' ugliness, inherent risks and dangers, and inability to cope effectively with modern technology and lifestyle choices (Bruegmann, 2005; Garreau, 1992; Government of South Australia, 1962; Keeble, 1969).

By the 1990s, there were a growing number of urban scholars who viewed the traditional civic or neighbourhood commons as a far superior to the modernism of the shopping mall (Brugmann, 2009; Dovey, 2010; Forsyth and Crewe, 2009; Mitchell, 2006). The neighbourhood and civic commons they argue are nuanced places that have evolved over decades or centuries and been animated by diverse bottom up forces throughout that evolution. They provide within a single bounded and traversable realm most of what one might need, conveniently clustered and integrated to provide accessibility, diversity, symbiosis, complexity, and intimacy. Their intricately evolved complexity built upon relationships and synergies incrementally developed over time and space means they are impossible to replace once lost to thoughtless development (Brugmann, 2009; Forsyth and Crewe, 2009). The shopping mall on the other hand is bleak, boring, bland, ugly, standardised and designed for stasis. Within them, commerce has lost its integral role of responding to the vernacular to offer unique products and services in favour of a bland, universal, standardised form of distribution, public life and place (Crawford, 1992; Dovey, 2008).

A fundamental difference between the mall and the commons is that while the latter is open and subject to the laws of the land, the former are privately owned spaces where the public is invited. In these privatised public realms, the laws of the land are supplanted by the laws of private property (Banerjee, 2001; Voyce, 2003). The laws of private property enable managers to operate as

‘shadow governments’ with their own bureaucracies, police forces, and regimes of punishment. This power is routinely used to enforce often draconian laws and regulations based upon commercial imperatives without regard to rights conferred by citizenship, enabling the creation of a semi-private realm of citizenship by consumption (Fyfe *et al.*, 2006; Miles, 2010).

Once the public has been lured into the privatised space of the mall, proprietors are free to experiment in entrapment and manipulate genuine human desires for communion, conviviality, fraternity and public life into consumption (Goss, 1993; Dovey, 2008). Movement is choreographed to prevent gathering, socialising and lingering, and increase the opportunities for impulse purchasing. Distractions are purposefully avoided unless they are demonstrably useful tools for beginning the choreography of movement. More sinisterly, science in the form of psychology, neuropsychology and behavioural science, is routinely used to feed compulsion by laying requisite traps and eliciting unnecessary consumption (Dovey, 2008; Goss, 1993; Miles, 2010; Staeheli and Mitchell, 2006).

While malls are often cited as modern products of a free enterprise culture and economy (Bruegmann, 2005; Kaliski, 1999), there is actually very little freedom of enterprise for individual proprietors within them. Individual businesses are tightly controlled by centre management as to their layout, decor, prices, window displays, signage, store atmospherics, staff behaviour and dress, products sold, and hours of operation (Coleman, 2006; Dennis *et al.*, 2005; Levy and Weitz, 2007).

For mall management, having the optimum tenancy mix is a priority, and is routinely adjusted subject to the latest retail and marketing research (Kirkup and Rafiq, 1994). In particular, mall design and management uses the neuromarketing technique of making connections with the subconscious. In a postmodern and globalised age this makes the inclusion of well-known and well-advertised brands and stores, usually major national and/or international chain stores and franchises an imperative (Hannigan, 2003; Kowinski, 2002). The chain store also shares similar McDonaldised corporate structures and ethos to the mall itself making them natural collaborators (Coleman, 2006; Mitchell, 2006; Ritzer, 2011; Voyce, 2003). In addition, chain stores provide supplementary advantages over independents, such as long secure leases, diminished likelihood of failure, and for new centres the long term lease guarantees required to attract initial finance (Harris, 2002).

The advantages conferred upon the major chain store staples begins with, but is rarely limited to, rents paid. While rents are determined by competition and happenstance within a town precinct, in the shopping centre they are determined by formulas to create the necessary tenancy mix. In general, anchors are afforded the lowest rents, small chains and franchises somewhat more, while independents are charged exorbitantly (Dovey, 2008; Levy and Weitz, 2007). In addition, smaller independents are subject to strict regulations, overage, arbitrary changes, and short leases (Mitchell, 2006; Voyce, 2003).

3. THE DYNAMISM OF THE MALL VERSUS THE COMMONS

Attitudes to shopping centre development often fall on either side of what Schuman (2007) described an epochal struggle between two versions of capitalism. One side, sees the shopping mall as exemplars of the social and commercial benefits derived by laissez faire capitalism and efficient businesses responding to popular choices. The other side champions the virtues and promotion of small scale complexity, and the self-reliant production of goods and services at a local level they see encapsulated in the endogenous dynamism of the traditional town commons.

In the small community, town and suburb the shopping mall produces instant change on a giant scale. The mall arrives as catastrophic investment (Jacobs, 1993), severely disrupting and often supplanting endogenous structures that have evolved over generations. Mitchell (2006) and Shuman (2007) argue the giantism behind the shopping mall sidelines local entrepreneurship, creativity, innovation and investment in local economies by transforming activity centres from hubs of the endogenous economy into distribution points for global capital and production. They remove, by design and management, bottom up pluralism from the creation, design and management of local economies and the endogenous dynamism this produces (Amin, 2010; Brugmann, 2009; Dovey, 2008; Martin, 2012).

Amin (2010); Brugmann (2009); and Shuman (2007) argue economic activity is at its most dynamic and productive when powered by the bottom-up creativity, innovation and ingenuity of local entrepreneurs, and the spending power of an engaged community. Local entrepreneurs they argue are in the

best position to observe and respond in innovative and idiosyncratic ways to niche opportunities present in local communities.

In addition, endogenous economies evolve and grow by cycling exogenous inputs of capital, decreasing the percentage of transactions that lead to direct outflows of money. As locally owned independent businesses in locally owned stores are much more likely to purchase locally, use locally based ancillary services, and distribute philanthropy locally (Mitchell, 2006; Shuman, 2007). The corporate giants that dominate shopping malls, on the other hand, purchase nationally or internationally, and use ancillary services near the headquarters. Consequently, the loss or absence of locally owned independent businesses in favour of chains lessens the number of locally-based ancillaries, such as advertising, repairs, legal, accounting, inventory and other professional services, further reducing the amount of money circulating through a community (Fleming and Goetz, 2011; Halebsky, 2010; Mitchell, 2006; Romer, 1994; Schumacher, 1974).

The endogenous thesis is challenged by a dominant neo-liberal doctrine that sees postmodern development being largely concerned with securing exogenous inflows of globalized capital through tourism, education, conferences, property development and direct investment (Blair and Carroll, 2009; Marcuse and Van Kempen, 2000). In particular, shopping mall development is the means by which large scale global investment enters small post-industrial communities.

The shopping mall also holds out the promise of raising productivity and enhancing a town's commercial attractiveness. The enhancement is derived by expanding the town or regions economic base by providing a full range of retail opportunities locally and therefore reducing residents' need to drive to other districts to spend what is referred to as 'escape expenditure'. Furthermore, it is argued that by offering expanded retail opportunities within a region, a locality has the potential to draw consumers from neighbouring areas, adding to the 'base economy' and enhancing regional competitiveness. Regional competitiveness and the allure of the mall can also be a lure for new residents and prevent existing residents, particularly youth, from decamping to cities or larger towns (Guy, 1998; Lowe, 2005; Ryan, 2006; Williams, 1997).

In Australia, the opening of a shopping mall typically comes with the promise of economic stimulus and jobs (District Council of Renmark Paringa, 2005; Mitchell, 2006; Ryan, 2006; Voyce, 2003 and 2006). However, there is an absence of empirical research into the effects of shopping malls on

commercial activity and employment in small communities. Contemporary research into the impacts of shopping centre development has tended to focus on the arrival of hypermarkets and superstores. Nevertheless, as shopping malls are a major means by which chain stores big and small establish in small communities, this research has relevance.

In this wide body of research, the effect of transferring retail expenditure from precincts to superstores on net employment and business activity has been contentious. In the UK, Porter and Raistrick (1998) found a net decline, while an EDAW (1999) paper instigated by Tesco concluded the opening of hypermarkets added to retail employment. Thorpe (1999) concluded that there was probably a loss of jobs but it was inconclusive due to the inadequacy of the data. In the USA, where a wide body of research and analysis has gone into the effect the arrival of a Walmart has on small economies, the impacts are also contested. Some research has concluded that the opening of a Walmart increased overall retail employment while others showed employment change ranging from modest gains to moderate losses (Irwin and Clark, 2006). Angotti *et al.* (2010) in a review of over 50 studies published on the topic between 2002 and 2010 concluded that the overwhelming weight of independent research points to the opening of a Walmart resulting in a loss of small and medium sized businesses and a net reduction in local retail employment.

There is also an emphasis in the research of measuring short term effects on retail employment alone, ignoring medium and long term impacts upon a region's broader commercial activity and employment. Nevertheless, some scholars, both champions and detractors of the superstore, acknowledge the potential of broader impacts (Alzubaidi *et al.* 1997; Sobel and Dean, 2008; Romer, 1994; Shuman, 2007). Sparkes (2000, p. 15), describes the data used in most research as 'Neanderthal' and unable to accurately measure a postmodern service economy's employment loss and transfer as part of a continued economic dynamic. While Fleming and Goetz (2011) and Shuman (2007) argue the loss of major anchors and subsequently activity from the commons will result in the undermining of synergies and relationships that endogenous economies are built upon, leading long term, to a cascading decline of business activity and employment across diverse sectors.

While there is broad consensus amongst their proponents that shopping centre development ultimately creates jobs, there is also a neo-liberal argument that the opening of superstores and chain stores can come with a short term

loss of local retail businesses and jobs. Alzubaidi *et al.* (1997) and Sobel and Dean (2008) argue there can be a decline in retail employment when highly efficient retailers replace smaller less efficient stores. However, the increased spending power that increased productivity provides by lowering prices is not lost but rather diverted into expanding sectors such as personal services, cafes, restaurants and niche retail (Sobel and Dean, 2008).

4. RESEARCH METHOD

The literature points to the opening of major shopping centres potentially having vastly different effects, for good or ill, over the short or long term. This research tests the claims of both shopping mall advocates and detractors by measuring both short term and long term effects of major shopping centres on employment and local business ownership using ABS Census Workplace data. The Census Workplace data compiles data pertaining to people working in a geographical location who may or may not also live in that location. In the short term it tests them using three Local Government Areas (LGA) in regional Australia. Then it compares long term effects upon broader economic activity and employment in eight regional and peri-urban Australian towns.

Short term effects are measured by comparing changes in employment and local businesses in three regional locations prior to the opening of major shopping malls at the 2006 Census and after at the 2011 Census. The research compares the number of people working full and part time, and business owner managers per 1000 residents to accommodate population change, in business types typically found within major shopping malls, *retail, food and beverage services* and *personal services*. Numbers of business owner managers and hours worked in the personal service category cannot be included because the ABS does not provide an autonomous figure.

The research for these towns also includes a count of vacant retail premises, compiled by the author during visits in 2015. The percentage of vacancies is used as an indicator of centre health using Baker and Wood's (2010, p67) indicators as a reference, 5 per cent being appropriate for viability, over 10 per cent a sign of problems, and over 20 per cent indicating serious structural problems. Figures prior to the opening of the malls are available in academic research for Griffith and Armidale but not Renmark. Therefore, reports in the local media have been used to garner evidence of whether the vacancy levels observed in 2015 were a feature prior and closer to mall openings.

The three locations used to test short term changes are the Renmark-Paringa LGA in the Riverland of South Australia, the Armidale- Dumaresq LGA in the New England region of New South Wales, and the Griffith LGA in the western region of New South Wales (Table 1). The LGA level has been used in this analysis as these were not changed between these Censuses, while Other ABS Census collection districts underwent major reformation between these Censuses. The three specific LGAs were chosen because they are dominated demographically and commercially by single towns (Renmark, Armidale and Griffith), where major shopping malls were constructed between 2006 and 2011. All three towns are also relatively close to other towns from which they could potentially lose escape expenditure and/or attract patrons. The figures for Australia are also provided to give an indication of effects on employment in these sectors not related to major shopping centre openings. As the collection districts are political not economic regions the comparison is solely across time.

The long term impact of shopping centres is achieved by comparing a broad range of employment activity per 1000 residents in settlements that have been dominated commercially by either shopping centres or traditional town centres for over twenty years. In this case the research compared full and part time employment and business owner managers in primary, secondary and tertiary business sectors likely to grow via symbiotic relationships with retail activity. The primary business and employment category measured is *retail*. The secondary group are categories containing businesses that can be enhanced by relationships with anchor retail and the large predictable crowds they draw as well as public gathering more generally. They are also categories likely to expand post the productivity gains Sobel and Dean 2008 argue are obtained by having more efficient retail chains establish. These are *food & beverage service, personal services, arts & recreation services, and adult & community education*. The tertiary group consists of categories dominated by ancillary support services that might benefit by relationships with local businesses and the existence of a strong endogenous economy. These are *information, media and telecommunications, financial and insurance services, property operations & real estate services, professional scientific and technical services, administrative services, wholesale trade, and repair and maintenance services*.

In these case studies the Census Statistical Area Level 2 (SA2) are used because in ‘*in rural areas they define functional zones of social and economic links*’ (ABS, 2011) The first four SA2s are named after the significant towns they encompass, the Mt Gambier (SA2), Whyalla (SA2), and Port Lincoln (SA2) in South Australia, and the Broken Hill (SA2) just over the border in New South Wales. These towns are all major regional centres, therefore likely to draw patrons from beyond their immediate vicinity. Consequently, a second employment figure per 1000 residents, which includes neighbouring SA2s, is also provided.

The second group of five settlements are the Strathalbyn (SA2), the Goolwa-Port Elliot (SA2), the Gawler North and South (SA2), the Seaford (SA2), and the Aldinga (SA2). All of these areas are within 70kms of the Adelaide CBD and are adjacent SA2s containing significantly larger regional or district centres. Therefore, residents in each have easy opportunities to shop or socialise in centres larger than those in which they live.

5. CASE STUDY ONE: SHORT TERM IMPACTS

Table 1. Demographic Data, Case Study 1

	Renmark-Paringa		Armidale- Dumaresq		Griffith	
	2006	2011	2006	2011	2006	2011
Population	9 623	9 399	24 097	24 797	23 795	24 511
Average weekly household income	\$764	\$844	\$856	\$989	\$994	\$1 068
Unemployment rate	4.5%	5.7%	8.3%	7.6%	5.2%	4.8%

Source: ABS (2007a), ABS (2012a).

The Renmark Plaza shopping mall opened in 2007 and added 11 904 m of floor space, doubling the amount in the town. It includes a supermarket, discount department store and 17 specialty stores (Property Council, 2015a). Most significantly, it created a second major activity node disconnected from the historical town centre. In 2015 the traditional town centre, was significantly less active than the new shopping mall and over 20 per cent of premises were

vacant. A level Baker and Wood (2010) argue indicates significant structural problems.

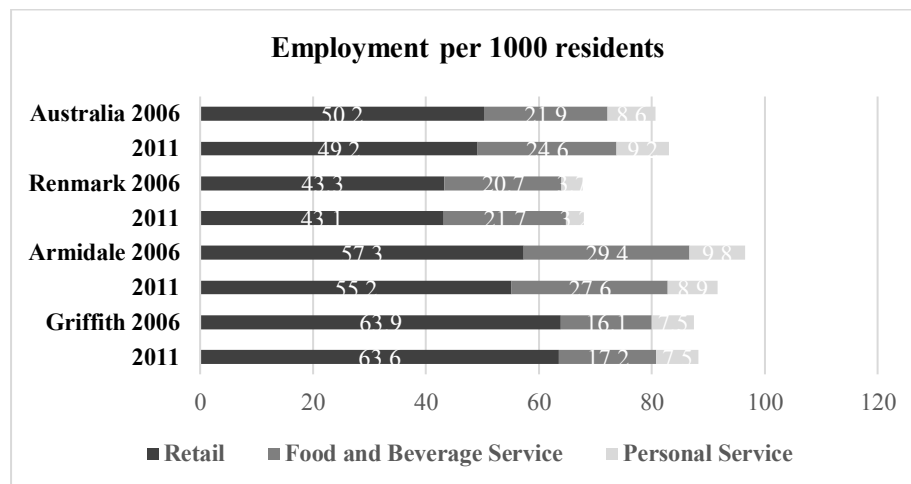
The Armidale centre also opened for business in 2007 and added 14 700 m of retail floor space to the town (Property Council, 2015b). The new mall included a large supermarket discount department store and 50 new specialty stores. In addition, the existing Armidale Plaza Shopping mall was refurbished and expanded the following year adding over 8000 m² of floorspace in the form of a supermarket and 25 specialty shops (Property Council, 2015b). Together these two developments increased retail floorspace within the town by over a third. Subsequently, the traditional town centre, particularly the Beardy Street Mall and adjacent streets and arcades, according to reports in the local media has been left with a fraction of its historical activity and less than that found in either shopping mall (Armidale Express Editorial, 2014; Nickell, 2013; Roberts, 2014). In 2012, 17 per cent of retail premises in the Beardy Mall and immediate surrounds were vacant which had risen 20 per cent in 2015, higher than the 9 per cent observed in 2004 (Wood *et al.* 2012).

The Griffith Central Shopping Centre also opened in 2007 and added 17 000m of retail floorspace, increasing retail floorspace in the town by approximately 20 per cent (Property Council, 2015b). In 2015 over 20 per cent of stores in town were vacant. This compares to a vacancy rate of 6.4 per cent in 2003 prior to the mall opening (Burns and Willis, 2011). In particular, Banna Ave, the major commercial street of the town, was reported in the local media as having lost much of its previous vitality (Johns, 2011; Tyson, 2008a; Tyson, 2008b).

All these shopping malls, came with the promise of massive capital investments (\$37.5 m in the case of Renmark, \$110m in the case of Armidale and \$65m for Griffith), and substantial economic stimulus and job creation (The Advertiser, 2006; ABC, 2007; McLennan, 2007). The promised economic stimulus was to come via the malls convenience, product range, low prices, brands, glamour and contemporariness reducing escape expenditure and drawing in residents of nearby farms and towns that lacked such attractive places (ABC 2007; Cramarty, 2005; District Council of Renmark Paringa, 2005; Murray Pioneer, 2007; McLennan, 2007). In addition, it was argued these allures held out the promise of attracting new residents, and university students in the case of Armidale, as well as reducing the emigration of residents, particularly the young, to cities and larger towns. These arguments

proved persuasive, and while there were voices in opposition, they were largely drowned out by support from state and local politicians, consultants, bureaucrats, business groups, and the media. The developments subsequently proceeded with significant support (ABC, 2005; ABC, 2007; District Council of Renmark Paringa, 2005; Knight, 2007; Tyson, 2008a).

In the total of all sectors, employment per 1000 residents rose by 2.9 per cent nationally, but it fell by 5 per cent in Armidale, and rose by 0.4 per cent in Renmark and 0.9 per cent in Griffith (Figure 1). All three LGAs followed the national trend of falling retail employment, however the fall was lower than the national average of 2 per cent, in Renmark-Paringa (0.5 per cent) and Griffith (0.5 per cent), but higher than average in Armidale-Dumaresq (3.7 per cent). In the food and Beverage sector Renmark-Paringa experienced a 4.8 per cent rise and Griffith a 6.8 per cent rise, both slightly less than the national trend, however, Armidale Dumaresq went against the national trend and experienced a 6 per cent decline. Finally, while employment in the personal service sector rose by 7 per cent nationally, it fell by 13.5 per cent in Renmark-Paringa, 9.2 per cent in Armidale-Dumaresq, and remained steady in Griffith (Figure 1).

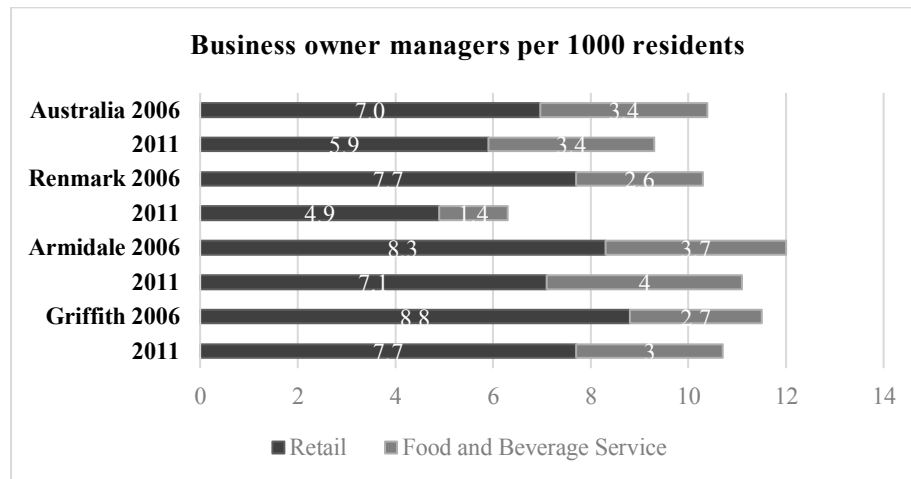


Sources: ABS (2007a), ABS (2007b), ABS (2012a), ABS (2012b).

Figure 1. Sector Employment Data, Case Study 1.

Across Australia there was also a 3.8 per cent decline in the numbers of employees working full-time (more than 35 hours) in the retail sector. In Renmark-Paringa, there was a 17.5 per cent fall in the proportion of employees working full time. In Armidale-Dumaresq full time retail employment fell by 7 per cent, and in Griffith by 4.2 per cent. In the food and beverage sector full-time employment fell nationally by 5.9 per cent. However, in Renmark-Paringa the proportion of people employed full time rose by 9.6 per cent, in Armidale-Dumaresq it rose by 7.1 per cent, and in Griffith by 2 per cent (ABS, 2007b; ABS, 2012b).

The numbers of business owner managers fell in the retail sector nationally and in all of the LGAs. The fall was particularly dramatic in Renmark-Paringa where it fell 36.6 per cent compared to 15.7 per cent nationally. In Armidale they fell by 14.5 per cent and in Griffith there was 12.5 per cent fall (Figure 2). In the food and beverage sector, while the national figure remained steady at 3.4 business owners per 1000 residents, numbers fell by a substantial 46.1 per cent in Renmark-Paringa, but rose by over 10 per cent in both Armidale and Griffith (Figure 2).



Sources: ABS (2007a), ABS (2007b), ABS (2012a), ABS (2012b).

Figure 2. Business Owner Mangers, Case Study 1.

The absence of a consistent pattern of loss or gain in the three areas and Australia as a whole over a short period of time makes the attribution of cause and effect difficult. Changes in commercial activity over a five-year period can occur because of any one, or combination of, social, cultural and economic variables. In particular, broader economic conditions can have major impacts. Nevertheless, comparing the three LGAs with the national average for the period there is no evidence of the boost to economic activity promised prior to development. There is also no evidence to support the promised economic stimulus and boost to local employment through the paring back of escape expenditure and attracting customers from further afield. At best the massive increase in retail floorspace and premises these new malls installed has led to a net transfer of commercial activity from the traditional precincts and their independent traders to the malls and their chain stores. There is also some evidence in the comparative declines in cross sectional employment, particularly full time employment, and the loss of business owner managers, of a short term negative effect on local economies.

This transfer of activity and ownership from the town commons to the shopping centre represents a shift in economic dynamism from the endogenous to the exogenous. Proponents of endogenous activity argue that over time this will produce a cascading decline in numbers of locally based businesses and employment across a broad range of sectors, as locally based complex commercial relationships and synergies are progressively displaced (Fleming and Goetz, 2011; Romer, 1994; Mitchell, 2006; Shuman, 2007; Williams, 2008).

6. CASE STUDY TWO: LONG TERM ECONOMIC REPERCUSSIONS

The next case study analyses the broader commercial impact long term domination by shopping malls is having on four mid-size towns and their immediate regions, Broken Hill (SA2), Whyalla (SA2), Mt Gambier (SA2) and Port Lincoln (SA2). The four towns are all hundreds of kilometres from towns larger than themselves and are hence the major service centres in their greater regions. With the exception of Broken Hill, they all have similar average household incomes (Table 2). However, they vary in one important respect. Mount Gambier and Port Lincoln are towns that have evolved with commercially and socially dominant traditional town precincts. Whereas,

Whyalla and Broken Hill are towns where major retail anchors such as supermarkets and discount department stores have been in major out of town shopping malls for over 30 years.

Table 2. Demographic Data, Case Study 2.

	Mt Gambier	Whyalla	Broken Hill	Port Lincoln
Population	27 755	21 991	18 577	15 221
Average weekly Household Income	\$926	\$936	\$786	\$950
Average Household Size	2.4	2.3	2.2	2.4

Source: ABS (2012c).

Mt Gambier is over 350 kilometres south east of Adelaide and Port Lincoln is over 500 kilometres west by road from Adelaide at the base of the Eyre Peninsula (Figure 3). Both towns have nineteenth century origins and have evolved since inception with traditional CBD precincts as their major transaction places. In both towns, traditional precincts contain the great bulk of commercial, civic and social activity and a diversity of stores, including all major retail anchors, offices, pubs, hotels and community facilities. There are approximately 450 retail premises in Mt Gambier with a vacancy rate below 10 per cent in 2015 (this figure was taken post 2013 and is likely to have been impacted by a new shopping mall). There are approximately 250 retail premises in Port Lincoln with a vacancy rate below 5 per cent in 2015.

Whyalla is 375 kilometres north west of Adelaide (Figure 3). While Whyalla does contain a traditional town precinct, it is not the major commercial centre within the town as it has just 75 retail premises of which well over 20 per cent were vacant in 2015. In addition, none of the township’s supermarkets, department stores, government offices, major service providers or educational institutions are located within it. The major commercial focus of the town is instead an elongated stretch of arterial road that dissects the residential area of the town from east to west. This stretch of road includes the 18 315 m² Westland shopping mall which contains the town’s two largest supermarkets,

a discount department store and 47 specialty stores (Property Council, 2015a). There is a second department store in town, also well outside the town centre, as are a number of other commercial premises scattered around the town in discrete boxes and smaller shopping centres.



Source: OnTheWorldMaps (2016)

Figure 3. South Australia Map.

Broken Hill is a mining town 500 km from Adelaide just over the state border in New South Wales (Figure 3). Broken Hill's major retail anchors, supermarkets, discount department stores and 25 specialty stores, are in the 17 498 m² Westside Shopping mall (Property Council, 2015b). There is also a second neighbourhood shopping centre outside the town centre which contains a chain supermarket and a few shops. Unlike Whyalla, the traditional town centre CBD is large, diverse and contains significant number of commercial, social and civic functions. It has 225 retail premises, however, over 20 per cent of these were vacant in 2015. While the town centre remains a major commercial player, Westland Mall's monopoly on major retail anchors mean it is often busier.

The long term impacts of shopping mall dominance upon these towns and their endogenous dynamism are clear and large when broader service activity and employment is compared. Firstly, there are between 41 per cent and 121 per cent more locally owned businesses in the two precinct dominated towns of Mt Gambier and Pt Lincoln than in shopping mall focussed Broken Hill or Whyalla (Figure 4).

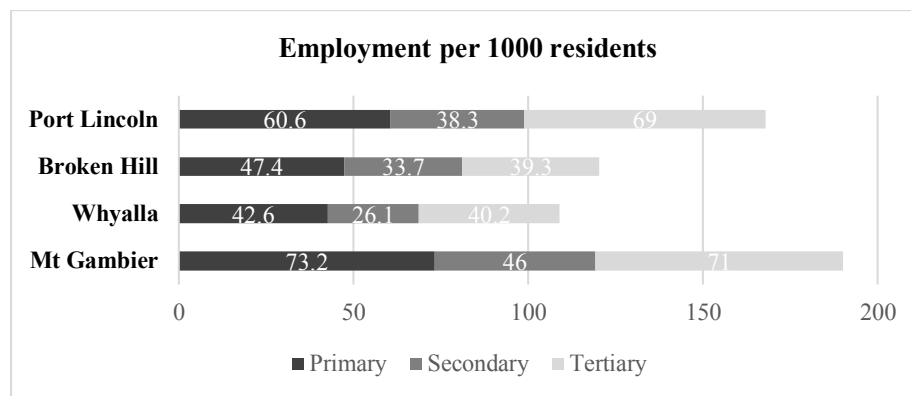


Sources: ABS (2012c), ABS (2012d).

Figure 4. Business Owner Mangers, Case Study 2.

In individual employment categories, Mt Gambier and Port Lincoln have between 28 per cent and 72 per cent more retail employment than Broken Hill or Whyalla. With the exception of Food and Beverage Services in Broken Hill,

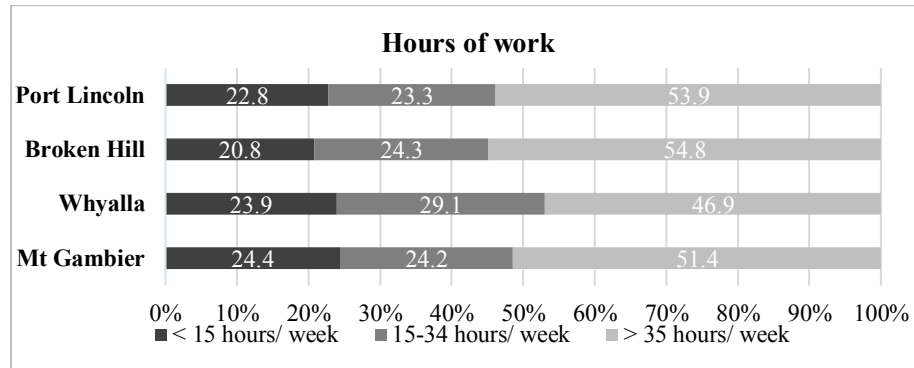
the disparity continues broadly across secondary sectors with Mt Gambier and Port Lincoln having between 18 per cent and 74 per cent more employment in these sectors. Again with a couple of anomalies, *Information media and telecommunications* in Broken Hill and *Administrative Services* in Whyalla. There is between 72 per cent and 82 per cent more tertiary employment in Mt Gambier and Port Lincoln than Whyalla and Broken Hill. Overall Mt Gambier and Pt Lincoln have between 38 per cent and 72 per cent more employment across all sectors (Figure 5).



Sources: ABS (2012c), ABS (2012d).

Figure 5. Sector Employment, Case Study 2.

Broken Hill has more of its much smaller service sector workforce working full time than either Pt Lincoln or Mt Gambier. However, Whyalla's smaller service sector workforce is less likely to be working full time than the others (Figure 6). In a comparison of all four towns, we see that the town with the greatest domination by shopping centres performs significantly worse in all areas when compared to the towns which maintain dominant traditional town commons.



Source: ABS (2012d).

Figure 6. Hours of Work, Case Study 2.

However, all of the towns are the largest towns in their rural regions, therefore, they are likely to be used by a catchment greater than their own residential population. In particular, each is surrounded by adjoining SA2s made up of farms, forests, mines and towns with fewer than 2000 residents. Therefore, a second employment figure per 1000 residents that incorporates surrounding SA2s follows. When adjacent SA2s are incorporated, employment in Mt Gambier falls from 190.2 per 1000 to 164.4 per 1000, in Port Lincoln it falls from 167.2 to 155.4 per 1000, and in Broken Hill it falls from 120.4 to 112.2 per 1000. However, the Whyalla (SA2) figure of 108.9 per 1000 actually rises slightly to 109.7 per 1000 when surrounding regions are included. While there is a narrowing of the differences between towns when surrounding regions are included, the difference nevertheless remains substantial across all sectors in favour of the towns with strong town precincts (ABS 2012e; ABS 2012f).

Retail modelling maintains the larger the catchment and the higher household incomes, the more thresholds of viability that are crossed for specific enterprises and the greater the per capita commercial activity (Curtin and Church, 2007). There is no sign of this in these case studies. For example, Whyalla, the second largest town with a similar average household income to Mount Gambier and Port Lincoln, has much lower levels of employment (Figures 4 and 5). In addition, the small towns that surround Whyalla, all with

fewer than 2 000 residents, have higher per capita employment than Whyalla, the region's major commercial and administrative centre (ABS, 2012e; ABS, 2012f).

7. CASE STUDY 3, PERI URBAN ADELAIDE

Table 3. Demographic Data, Case Study 3.

	Gawler	Aldinga	Seaford	Goolwa	Strathalbn
Population	26 398	14 153	18 929	10 438	6 454
Average weekly Household Income	\$1 062	\$990	\$1 076	\$736	\$986
Average Household Size	2.5	2.5	2.5	2.1	2.5

Source: ABS (2012g).

The third case study analyses employment data in 5 peri-urban locations around metropolitan Adelaide, South Australia. The first two locations, the Strathalbyn (SA2), and Goolwa-Pt Elliot (SA2), have ostensibly a great deal in common, including location, size and proximity to larger centres. Strathalbyn is 50 km from the Adelaide CBD, and also less than 20 kilometres from the much larger district centre of Mt Barker. Goolwa-Port Elliot is similarly less than 10 km from the larger centre of Victor Harbour, and around 75 km from the Adelaide CBD. Strathalbyn's main town precinct is an attractive, well integrated and diverse traditional town common of shops (including two supermarkets), pubs and community facilities. There are 98 premises in town with a vacancy rate of under 5 per cent. On the other hand, Goolwa-Port Elliot has 3 major activity centres. Two are traditional high street precincts, one at Goolwa and one at Port Elliot, while the other is a shopping mall at Goolwa. The areas only two supermarkets are both in the shopping mall. The shopping mall and immediate environs also include a large hardware store and 14 smaller specialty stores. Both the Goolwa (95 premises) and Port Elliot (29 premises) high streets have significantly more stores than the shopping mall and have vacancy rates of under 5 per cent.

Although not nearly as significant as the four previous towns, the differences between precinct focused Strathalbyn and mall focussed Goolwa-Port Elliot are notable. Strathalbyn has 34 per cent more retail employment than Goolwa-Port Elliot. The gap at 12 per cent is much closer in secondary employment, due largely to Goolwa having 24 per cent more employment in *food and beverage services*. This anomaly is likely due to the tourist attractions of Goolwa-Port Elliot. However, Strathalbyn has 63 per cent more employment in tertiary employment but lower levels in the single category of *property operations and real estate services*. Overall Strathalbyn has 34 per cent more employees in tertiary categories than Port Elliot-Goolwa (Figure 7). Strathalbyn also has 20 per cent more employees working full time in these sectors (ABS, 2012h). However, the lower levels of employment are not reflected in numbers of business owner managers which are similar (Figure 8).

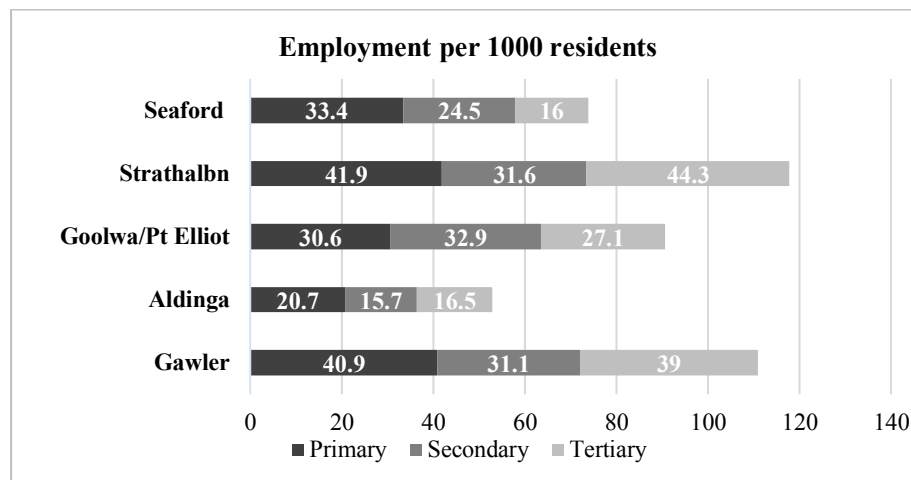
The next settlements for direct comparison are the Gawler North and South (SA2), Seaford (SA2) and the Aldinga (SA2). These settlements also ostensibly have much in common. They have similar average household sizes and median incomes (Table 3). They are all 30-40 km from the Adelaide CBD, Gawler to the north and Aldinga and Seaford to the south, and are discrete settlements 10 km beyond the contiguous suburban edge. Seaford, is separated from the contiguous form of metropolitan Adelaide by the considerable expanse of the Onkaparinga River Conservation Park, but is distinctly outer suburban in form and function.

All three areas have experienced significant population growth over the last 20 years due to their metropolitan proximity, and are economically and socially, part of the greater metropolis. All three are also close to major metropolitan shopping malls. Aldinga is 10 km from the 21 696 m² Seaford district shopping centre and 15 km from the 65 059 m² Colonnades regional shopping centre. Seaford is 5 km from the Colonnades regional shopping centre. While Gawler is 10 km from the 65 000 m² Munno Para district shopping centre, and 15 km from the 80 745 m² Elizabeth regional shopping centre (Property Council, 2015a).

However, the contrast between their activity centres is marked. Gawler's major activity centre is a traditional precinct. Until very recently all major retail anchors such as supermarkets and department stores, had been developed in close proximity to Murray Street, an attractive and well maintained high street, of specialty retailers, pubs, cafes, offices and restaurants. In contrast, Aldinga's

rapid population growth over the past 20 years has been commercially centred on the 9 000 m² Aldinga Village shopping mall (Planning SA, 2007; Property Council, 2015a). While Seaford has one major 21 696 m² district level shopping mall and two smaller neighbourhood centres (Property Council, 2015a). There are no town precincts in either Seaford or Aldinga.

The contrasting activity centre form is reflected in the employment data. Gawler has 111 per cent more locally owned businesses than Aldinga (Figure 8). It has 115 per cent more employment overall; 62 per cent more primary employment, 114 per cent more secondary employment, and 136 per cent more tertiary employment. Gawler also has 15 per cent more employees working full time (ABS, 2012h). Although not as great as between Aldinga and Gawler, the differences between Gawler and Seaford are also significant. Gawler has almost double the number of business owner managers. It has 50 per cent more employment overall; including 23 per cent more primary employment, 27 per cent more secondary employment, and 144 per cent more tertiary employment (Figure 7). It also has 28 per cent more employees working full time (ABS, 2012h).



Source: ABS (2012g), ABS (2012h).

Figure 7. Sector Employment, Case Study 3.



Source: ABS (2012g), ABS (2012h).

Figure 8. Sector Business Owner Mangers, Case Study 3.

While the long term cost of shopping centre domination on employment is visible, when Strathalbyn and Goolwa-Port Elliot are compared, the greatest repercussions of shopping mall domination are evident in Aldinga and Seaford, where there have never been significant town precincts and shopping centres have always prevailed without competition. This situation has led to much lower levels of local business activity and employment as it has prevented an endogenous economy gaining a foothold and then incrementally expanding via the dynamism inherent in an engaged community.

8. CONCLUSION

While shopping mall development in towns is often touted by local growth machines, developers and free market advocates as producing an economic boost and net employment in the recipient community, there is no evidence in these case studies of this in the short or long term. Instead, the case studies provide evidence in support of the endogenous thesis that such developments lead to small losses of local businesses and employment in the short term which grows comparatively as losses cascade over the medium to long term.

In the short term, there was no evidence of increases to net employment and economic activity promised in Renmark-Paringa, Armidale- Dumaresq and Griffith as escape expenditure was supposedly halted and patrons attracted

from surrounding regions. Compared to the national average there is evidence of a small loss in business numbers and employment overall, but particularly in retail. Of particular note was the loss in the short term of local businesses, as patronage moved from the commons and their independent retailers to the shopping malls and their chains and franchises. The situation was most acute in Renmark-Paringa, the LGA where the new shopping mall had the largest proportional impact and where no shopping mall had previously existed.

The long term evidence in case studies two and three points to the short term stagnation and decline observed in Renmark, Armidale-Dumaresq and Griffith not being coincidental. To the contrary it suggests the beginnings of a cascading decline in activity and employment across a broad range of secondary and tertiary business and employment sectors, as endogenous forces are replaced by exogenous corporations.

In case study two, there are significant differences between employment activity and business owner numbers in favour of Mt Gambier and Pt Lincoln, which have retained their traditional commons as paramount activity centres, and Broken Hill and Whyalla where shopping malls are large commercial players. The detrimental impact is at its most acute in Whyalla where the traditional town centre has lost its preeminent economic and social role and been relegated to a comparatively minor position in the commercial life of the town. The effect is less severe in Broken Hill where the town centre has lost major retail but still retains an important civic, social and tourist role.

In case study three, Strathalbyn and Gawler, where traditional town commons remain paramount, perform better than the others where shopping malls have a significant presence. The situation is most grave in Aldinga and Seaford, where shopping malls prevail without competition from a traditional town centres. In Goolwa-Pt Elliot, where traditional town centres compete with shopping malls and tourism is a major economic focus, activity is stronger than in Aldinga or Seaford but weaker than in Strathalbyn and Gawler.

The research has found evidence that where shopping malls have replaced endogenous dynamism with exogenous investment, there has been a comparative loss of local business activity and employment. In addition, employment in the towns with shopping malls is proportionally lower across most sectors and subsectors; therefore, there is no sign of jobs lost in retail being compensated by job creation elsewhere.

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