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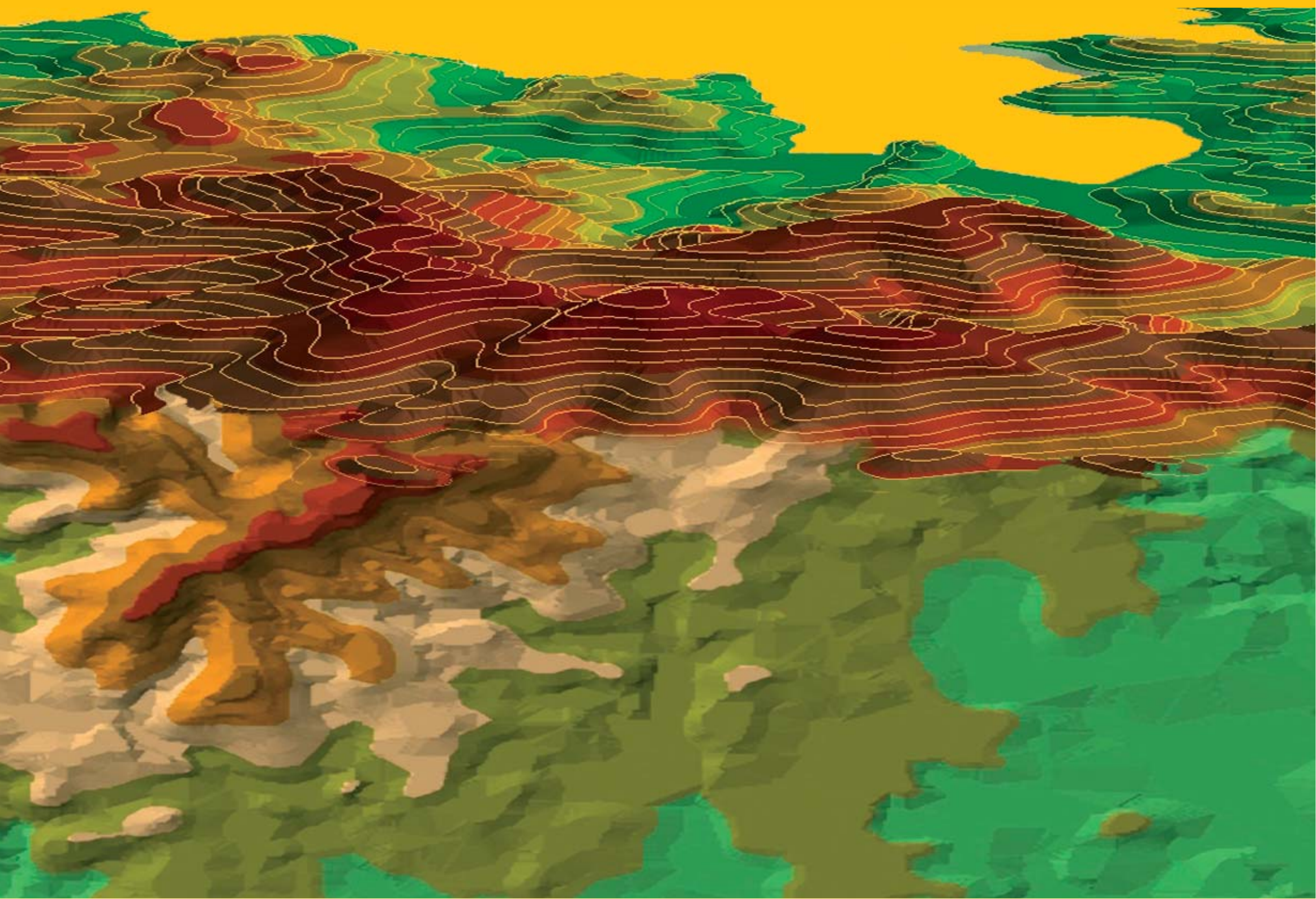

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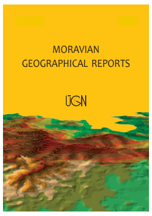

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Changing European retail landscapes: New trends and challenges

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Abstract

During the second half of the 20th century, consumption patterns in the developed market economies have stabilised, while in the transition/EU-accession countries these patterns were accepted with unusual speed and dynamics. Differences, changes and current trends in Western Europe and post-socialist countries in the quantity and concentration of retailing activities have been minimised, whereas some distinctions in the quality of retail environments have remained. Changes have occurred in buying habits, shopping behaviour and consumer preferences basically for all population groups across the generations. This article is a theoretical and conceptual introduction to a Special Issue of the Moravian Geographical Reports (Volume 26, No. 3) on "The contemporary retail environment: shopping behaviour, consumers' preferences, retailing and geomarketing". The basic features which have occurred in European retailing environments are presented, together with a comparison (and confrontation) between Western and Eastern Europe. The multidisciplinary nature of retailing opens the discussion not only from a geographical perspective but also from the point of view of other social science disciplines that naturally interconnect in the retail environments.

Keywords: *retail landscapes, retailing, shopping behaviour, consumer preferences, resilience, Western Europe, Eastern Europe*

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1. Introduction

Since the post-war era of the 1950s, the retail sector in Western Europe experienced a similar revolution to the industrial sector one hundred years earlier. The phenomenon of the 'industrialisation of retail' was thus replicated in the form of the internationalisation tendencies of multinational corporations and chains, resulting in the giant concerns such as the American Wal-Mart, French Carrefour, German Metro, Dutch Ahold and even Swedish IKEA. Despite all of these tendencies, the retail sector has never became as globalised as industry, which can be attributed to specific consumer cultural habits (Cliquet, 2006).

The top ten retail companies according to sales in the fiscal year 2016 are presented in Table 1. The dominant chains are still the ones with origins in the USA (with an unbeatable Wal-Mart and Internet Amazon with the highest year-on-year growth), with only three European companies that specialise in food and fast-moving goods.

Retailing and its activities, together with services, are in the long term the most significant vehicles for change, new trends and innovations in the tertiary sector. At the same time, however, in its breadth the retail sector is one of the most distinctive parts of worldwide globalisation and internationalisation trends of recent decades, and also one of the most visible features of the economic transformations in post-socialist and developing countries, where the dynamics of change have been extraordinary and relatively unique (Nagy, 2001; Burt, 2006; Szczyrba, 2005; Machek, 2012). The new dimension of large-format chain stores and shopping centres gradually overshadowed the traditional forms of retail. The shopping centres, in particular, became a phenomenon with both commercial and non-commercial purposes, and substituted as a function of public space to some extent (Crosby et al., 2005; Coleman, 2012; Pospěch, 2015).

2. Changes, differences and trends in European retail landscapes

The structure of the retail sector has been transformed considerably across Europe in recent decades. During the second half of the twentieth century, consumption patterns in the developed market economies stabilised, while in

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Name (country)	Retail income (billion USD)	The year-on-year difference (%)	Number of countries in which they operate
Wal-Mart Stores (USA)	485.9	0.8	29
Costco Whole Sale Corp. (USA)	118.7	2.2	10
The Kroger (USA)	115.3	5.0	1
Schwarz Group (GERMANY)	99.3	5.3	27
Walgreens Boots Aliance (USA)	97.1	8.3	10
Amazon (USA)	94.7	19.4	14
The Home Depot (USA)	94.6	6.9	4
Aldi Group (GERMANY)	84.9	4.8	17
Carrefour (FRANCE)	84.1	– 0.4	34
CVS Health Corp. (USA)	81.1	12.6	3

Tab. 1: The top 10 retail companies in the world according to sales in the fiscal year 2016 (Note: We may mention some other important European retail corporations such as Tesco (UK, 11th place, income of 72.4 billion USD), Ahold Delhaize (Netherlands, 14th, 69.0b.), Auchan Holding (France, 18th, 57.2b.), the Rewe Group (Germany, 22nd, 44.6b.) or IKEA (Sweden, 27th, 38.0b.)
Source: RetailNews (3/2018)

the 1990s in the transition countries these patterns had been accepted, and with unusual speed and dynamics (Kok, 2007; Kunc et al., 2013; Križan et al., 2014). Rapid adaptation of Western norms by the Eastern[1] markets was supported by the entry and dominance of Western capital. The potential of the Eastern markets, insufficient domestic competition, benevolent legislation as well as large (latent) consumer appetites attracted Western retailers who were facing a slowdown in the growth of their own markets during the 1990s and even later (Myers, Alexander, 1997; Burt, 2006).

In the middle of the 1990s, for example, all V4 countries (the Czech Republic, Hungary, Poland and Slovakia) were listed in the 30 countries with the best expanding retail markets in the world (Kearny, 1995). At the same time, international competition was rather extensive as many large-scale retail concerns decided to ‘control’ the Eastern markets simultaneously, and not all of them have lasted to the present (Szczyrba, 2010). Internationalisation became the dominant feature of European retailing (Burt, 2010). The process of internationalisation, which started first in Central and then in Eastern European countries, was thus very fast. The differences among European countries were virtually removed as far as quantity and concentration are concerned, yet certain contrasts remained regarding the quality of the products and the culture of the retail environment.

Although Europe has had to face great challenges in the last few years that posed threats to its stability (such as issues with refugees and terrorism, political tensions between Russia and Turkey, the Brexit referendum in the UK, etc.), the European economy and private consumption appeared to be very strong, which has also been acknowledged as due to the trust of consumers (Johnson, 2017). Despite the year-on-year growth in the retail trades in 2016 (by 1.7%), in almost all countries of the EU-28 stationary retail declined. The growth was thus maintained predominantly by on-line trading (e-commerce), whose significance keeps increasing in Europe even though the dynamics compared to previous years have slowed in the developed markets (e.g. Germany and Austria). In the Czech Republic, for example, in 2017, on-line sales have reached a share of 10.5% of the entire retail turnover (Geomarketing, GfK, 2017).

In 2016, the market value of the retail sector in Western Europe was approximately 2.6 trillion Euros, which was the highest amount in the last five years despite the above-mentioned declines. Compared to Eastern Europe the difference is obvious. There was also a year-on-year growth of the market value of retailing in the East, yet the numbers in 2016 were merely 565.6 billion Euros. In Western Europe, there are still many economically strong countries such as France and Germany, and compared to the Eastern countries they are unrivalled. The market value of retailing only in Germany represents one-fifth of the entire retail sector in Western Europe, and together with France, retailing represents almost one half of all of Western Europe (Geomarketing, GfK, 2017; RetailNews 1–2/2018).

The decrease in stationary retailing results in a decrease in the selling areas in European countries, predominantly in the developed markets. An increase in selling areas in food retail is often compensated for by the decrease in other segments of retailing (RegioData Research, 2017). In general, the selling areas in the stationary markets are in decline, which is, inter alia, a result of Internet (e-commerce) competition and due to the increasingly common use of so-called smart technologies (Pantano, 2017; Priporas et al., 2017). The retail companies in Western Europe are nowadays facing challenges that were unknown in the past – regarding the decreased turnover, profits and a strong pressure on prices. The decrease in selling areas naturally results in a stronger concentration of retail outlets, and at present, it happens very often that only three or four of the largest retail chains control up to 90% of the market of a given country (Geomarketing, GfK, 2017). Despite the above-mentioned facts and further expected declines, the selling area per person remains higher in the most developed markets within the EU, compared to more recent accession countries (see Tab. 2).

[1] Western’ and ‘Eastern’ in this paper refer largely to the more developed Western European countries, original members of the EU, compared to the Eastern (Central) European countries, with accession to the EU starting in 2004 and sometimes characterized as ‘transition’ economies.

Country	Retail area (m^2)	Country	Retail area (m^2)
Austria	1.67	Czech Republic	1.04
Belgium	1.64	Italy	1.03
Netherlands	1.61	Hungary	1.02
Switzerland	1.47	Slovakia	1.01
Germany	1.44	Poland	0.95
Sweden	1.27	Greece	0.74
France	1.23	Bulgaria	0.74
Spain	1.12	Romania	0.70
Croatia	1.10	Ukraine	0.44
Great Britain	1.09		

Tab. 2: Retail selling area per person in 2016 in selected European countries (in sq. m)
Source: RegioData Research (2017)

After the stage of internationalisation and the adoption of Western models and patterns (of buying behaviour), the Eastern markets reached a stage of consolidation with a relative stabilisation of the market (Coe and Hess, 2005). Reactions to the recent (2008) economic recession were similar to those in Western countries: the selling areas rather stagnated; and the concentration and saturation of the retail environment were also already very high (Simová, 2010). In the terms of some of the parameters used in these studies (e.g. regarding large-scale concepts, specifically the number of hypermarkets per person), the transitional Czech Republic is among the leading countries in Europe (Kunc et al., 2013). The large-scale retail and shopping centres in Western Europe are going through a stage of remodelling, enlargement and filling in the gaps in the market, and a similar situation is seen in East Central Europe. On the contrary, a noticeable expansion in this respect can be seen in Russia and Turkey, provided they are perceived as marginal European markets (Geo marketing, GfK, 2017).

The strongest retail segment is usually food, which was recently dislodged from the city centres of Central and Eastern Europe (similarly to what happened earlier in Western Europe), but is now returning in a specialised form (Mulíček and Osman, 2013; Syrovátková et al., 2015). Despite the fact that many consumers still prefer quantity, experts speak about the efficiency of shopping and consumption. The ‘impulse buying’ supported by advertising, promotional events, and the so-called POS (point of sale) / POP (point of purchase) market tools, is decreasing as people tend to think twice about what they want to buy and why. A second significant tendency is the focus on quality and value, which is now typical not only for the Western consumer. Daily shopping for fresh food and an increase in the purchase of branded and cheaper goods in sales, are proof of such a tendency (e.g. Dunne et al., 2011; Křižan et al., 2015).

It is obvious from the previous Table 2 that the Eastern markets still have a certain potential regarding the selling areas. Some of the Western chains have made use of this by developing their own chains (e.g. Auchan, Carrefour, Delhaize Group or Agrokor Group).

Another new trend is the opening of so-called premium formats and introducing new concepts that offer to consumers a better selling culture, along with more comfortable shopping and better service (typically the discount store Lidl, partially also Kaufland). Besides the well-established markets of Central Europe, an extensive Polish market has primarily become attractive for Western retailers, together with the south-eastern part of Europe, such as Romania, Bulgaria, Slovenia and Croatia. (Geomarketing, GfK, 2017; RegioData Research, 2017).

The above-mentioned trend for an uninterrupted retail decrease in the share of expenses of consumers in the developed European markets continued into 2016. Europeans tend to invest more of their disposable income in health care, medicine and gastronomy, as well as in common living costs. The decrease in unemployment and a slight increase in incomes have had a positive effect in many spheres. In 2016, the consumers of EU-28 countries received on average 16,153 EUR per person, which was a 0.7% (nominally) increase in purchasing power than in the previous year. It is necessary to indicate, however, that disparities in the exchange rates negatively influence the rate of the increase, especially with the devaluation of the British pound. The highest rates of growth were in the countries of Central and Eastern Europe, but they have hardly reached 60% of the European average (except Slovenia and Estonia) and it is highly improbable that they will equal the more developed countries in the near future – see Table 3 (Johnson, 2017; Geomarketing, GfK, 2017; RegioData Research, 2017).

Shopping alliances might boost the Western European markets, or rather save costs and increase price competition (Chatterjee, 2004). Shopping alliance membership has been an important trend in Western Europe in recent years, and such a trend is also moving to the east. The economic future of European retail will be reflected not only in the scheduled withdrawal of some giants from certain markets (e.g. Tesco from Central Europe) but also by making common agreements. More and more chains will operate under the largest European shopping alliance EMD (European Marketing Distribution), which reached an accumulated turnover of 180 billion Euros in 2016, and it will be of little importance anymore which part of Europe they come from and where they operate (Stanciu, 2015; EMD, 2017).

Another successful form of retail cooperation that has been in existence for several decades and is constantly developing and modernising is the franchise. In its modern form, this model moved to Western Europe from the USA in the 1960s (Kacker and Perrigot, 2016). Franchise chains established themselves in convenience stores, while many supermarket or hypermarket chains remained under the ownership of the company. Franchise and systems owned by the firm are probably among the most popular organisational forms of the retail chains in Western Europe,

Country	PP (€)	Country	PP (€)
Switzerland	38,965	Germany	20,840
Luxembourg	33,547	Belgium	20,447
Norway	28,255	Slovenia	12,115
Iceland	27,313	Estonia	9,853
Great Britain	23,871	Slovakia	9,682
Sweden	21,431	Czech Republic	9,207
Denmark	21,258	Poland	7,583
Austria	21,095	Hungary	6,623

Tab. 3: Selected European countries and their purchasing power per person in 2016 (in €)
Source: RegioData Research (2017)

as they increase productivity through their influence on the transfer of know-how in the form of intercultural communication and communication adaptation (Ghantous et al., 2018). In comparison, modern forms of the franchise are focused on e-commerce strategies and on-line shopping (Pénard and Perrigot, 2017).

The shift to the Eastern markets was merely a matter of time, and Central and Eastern Europe have become very popular markets for the franchise enterprise of Western European retail chains during the last two decades. Recently, franchise concepts in retail food segments have expanded enormously. This results from the above-mentioned fact that even consumers in Eastern Europe have started to turn away from shopping in supermarkets and prefer the smaller and more accessible shops in their neighbourhood (Kunc et al., 2012a). The concept of the franchise is presently perceived as a form of goods and services marketing by a subject that acts as a franchisor and provides more partners – franchisees – with the right to run the retail business using its products or services, under its own name, thereby uniting all the advantages of the direct sale. The franchise is one of the forms through which small- and middle-sized entrepreneurs are able to compete with the large firms. (Doherty, 2009; Križan and Lauko, 2014).

Last but not least, advertising is a major issue in retail marketing, i.e. both the traditional and new trends and forms of communication with the customer, as well as focusing on the chosen communication pathways. According to the German Research Institute EHI Marketingmonitor Handel 2017–2020, investments in digital communications are constantly increasing, yet retailers can hardly do without the standard leaflet. In food retailing, it is the medium with the most significant economic importance and the most advantageous form of offer in terms of communication, and at the same time it has the largest promotional effect. This situation is likely to change in the future, however. The younger target groups, the so-called generation Z, use digital media predominantly, and so the printed advertisement will probably not affect them (Priporas et al., 2017; Fuentes, Svingstedt, 2017). Compared to the costs of printed commercial advertisements, the digital forms not only save on such costs but can be also be directed more precisely to the target group by way of individual personal addressing. According to the above-quoted study, the Internet and smartphones are the first and foremost media for more and more customers when researching retail offers or planning a shopping trip. We should indicate that the advertising and marketing of consumer goods and products are not spatially limited, although certain cultural specifics might be acknowledged. In spite of this, we may observe a significant similarity between Western and Eastern Europe in this sphere of retail.

The newest trends, technological innovations and economic perspectives of the retail sector are regularly presented at the World Retail Congress. Since 2007, world leaders, innovators and retail beginners all meet here. The key topic of the Congress in Madrid in 2018 is "Innovate to Win", and its objective is to increase the efforts in retailing to innovate in all spheres of entrepreneurship, so that the expectations of the current demanding customers are met (World Retail Congress, 2018). The second continuation of the European Retail Conference in Milan in 2018 focuses on the European retail market, and the main topic is the ability to adjust to the changing consumer demands in the fast developing retail sector (RICS, 2018). The twenty-third continuation of the Retail Summit 2018 focuses on the Czech, Slovak and Central European retail markets; organised by the Czech Confederation of Commerce and Tourism and the University of Economics in Prague, it takes place in Prague. Its motto is the search for the balance between the retailer and the customer, the demand trends, and the search for new customers by means of new technologies. The IGD Company, which performs retail analyses, identified five global trends in the retail sector over the next several years on the basis of its global research. They are (after RetailNews 1–2/2018):

1. hybrid concepts of stores;
2. changes in the lifestyles of the consumers;
3. hyper-local retailing;
4. the speed and comfort of shopping; and
5. AI (Artificial Intelligence).

Whether retailing in Eastern and Western Europe has developed differently or similarly, the key question regarding its further progress lies in its planning and constructive regulation. In this context, there is still a significant heterogeneity concerning provisions in the individual countries (Spilková, 2010; England, 2012), so the European Retail Action Plan might be a comprehensive solution (Korthals Althes, 2016).

The economics of the retail sector and retailing is represented by contributions for the distribution and sale of goods (very often in on-line settings), branding, the retailing of professional and consumer services (Alexander and Doherty, 2009; Cristini and Laurini, 2017; Anselmsson et al., 2017; Ertz et al., 2017), retail management, and political and management decision making (Hübner et al., 2016; Gruber et al., 2016; Vyt and Cliquet, 2017). The most significant economic feature of retail research is seen in marketing with its various modifications, such as place marketing, buzzmarketing or geomarketing (Warnaby and Medway, 2004; Teller and Elms, 2012; Kita et al., 2013; Marjanen et al., 2016; Lowe et al., 2018). Another theme in economic research regards the attractiveness of retail environments in the context of municipal retail agglomerations, which are becoming more and more relevant in recent years (Teller and Schnedlitz, 2012; Teller et al., 2016; Križan et al., 2016). In addition, there are analyses of how the shopping centres work (Teller, 2008; Teller and Alexander, 2014; Bilková et al., 2016; Kunc et al., 2016; Gomes and Paula, 2016; Ferreira and Paiva, 2017), and we must not forget the more 'classical' studies focusing on international overviews of the retail sector or transformations in such environments (Nagy, 2001; Burt, 2006; Cliquet, 2006; Simová, 2010; Križan et al., 2016). Retailng, however, is not only the domain of the economists, it is also reflected in the studies of human geographers.

If we focus on the social behaviours of the individual or of population groups, buying behaviour represents one of the basic and most common forms. Buying behaviours can be studied using the perspectives of various social science disciplines – Psychology, Sociology, Anthropology or Human Geography. The psychology of the consumer accounts for the buying behaviour of the individual in relation to their value system, motivations and the realisation of needs, such as for example with respect to the classic Maslow hierarchy of needs or the typology of customers (Maslow, 1943, 1954). Classic studies in this vein include Stone (1954), Lesser, Huges (1986), Guy (1998a), Underhill (1999), Wagner, Rudolph (2010), Dębek (2015), Pyyry (2016) and many others. Sociological studies include consumer patterns, buying practices, the social behaviours of a given population or chosen population groups, the influence of the media and advertisements on buying behaviours, etc. These studies have been carried out in different settlement structures (e.g. urban vs. rural localities) or in regional or other subcultures (Schiffman and Kanuk, 2004; Spilková, 2012a; Davies et al., 2017; Križan et al., 2017; Sorensen et al., 2017; Page et al., 2018). In these studies, the psychological and sociological aspects of buying behaviours are very often interconnected, the border being blurred. Geographers, typically working in the area of Behavioural Geography, are often inspired by the methodological approaches of both of these disciplines.

The first geographical studies related to the retail sector are works that are connected to standard location theories, based on the spatial distribution of retailing and services, on distance relations and the hierarchy of settlements and various economic modifications (typically Christaller, 1933/1966; Lösch, 1944/1954). The geography of retailing started to develop as a geographical sub-discipline, according to Križan and Lauko (2014), at the turn of the 1970s and 1980s, although there are also older studies (e.g. Berry, 1967, Očovský, 1973, 1976). At this time it was necessary to create a theoretical-methodological system, the subject and the object of the research, with specialised terminology. In this respect, the following works may be considered groundbreaking: Geography and Retailing (Scott, 1970), Retail Location and Retail Planning (Guy, 1980), or Retail Geography (Dawson, 1981).

In the next two decades (the 1980s and 1990s), geographers, specifically in the Anglo-Saxon world, showed an increased interest in the issues of the retail sector. Some studies emphasised the importance of planning and localisation/locality (Davies and Rogers, 1984; Jones and Simmons, 1987; Guy, 1984, 1994). Some of the first studies, however, started to focus on buying and consumer patterns from the perspective of space and behaviour (Brown, 1992; Marjanen, 1995; Wrigley and Lowe, 1996). Consumption, in the broader sense of the word, perceived as an expression, reproduction and pronouncement of various identities and various forms of economic processes, has become an everyday part of the geographers' work (Ducatel and Blomley, 1990; Mansvelt, 2005). The term "new retail geography" appeared and it enlarged critical discussion in the entire Human Geography community (Lowe and Wrigley, 1996; Crewe, 2000). In the Czech and Slovak geographical communities, empirical studies were devoted mainly to the relations between the retail and settlement systems, or more precisely to their spheres of interest or the developing tendencies of the retail network (Očovský, 1986; Maryáš, 1988; Drtina and Krásný, 1989).

The new millennium has brought new challenges, confrontations and discussions into the geography of retailing. It would not be correct to state that geographers in their studies define the concept of 'Retail Geography' with respect to other scientific disciplines. On the contrary, the borders between the research and published results by geographers, economists, sociologists, psychologists and environmentalists are more and more blurred, which might be considered a logical, and to some extent, even a necessary development in such a multi-disciplinary issue as retailing. In the last two decades, geographers have become more inclined to qualitative (sociological and psychological) research on buying and consumer behaviours, which are frequently perceived as leisure activities in the shopping centre or in the form of visits to a food festival (Spilková, 2003, 2015; Timothy, 2005; Bäckström, 2006, 2011; McEachern and Warnaby, 2006; Mitríková et al., 2015; Timothy and Pena, 2016). Other new studies include those related to the globalisation of retail, economic and medical functions in work on the concept of 'food deserts' or 'healthy food shopping' (Cummins and McIntyre, 2002; Wrigley, 2002; Zenk, 2005; Syrovátková et al., 2015; Križan et al., 2015; Bakos, 2017; Bilková et al., 2017; Wood et al., 2017). Some of the latest trends, such as the 'Internetisation' of retail, on-line shopping or e-commerce and the use of GIS, are emerging in the geographical literature (Clarke et al., 2015; Kita et al., 2018).

This statement on the work of geographers does not imply that they completely abandoned quantitative or qualitative research approaches to retailing and the spatial aspects associated with them – typically regarding the location and planning of the retail structures, shopping catchment areas, the shopping preferences of consumers, work on consumption, etc. (Birkin et al., 2002; Wrigley and Lowe, 2002; Guy, 2007; Mansvelt, 2010; Kunc et al., 2012; Bilková et al., 2015; Birkin et al., 2017). Czech and Slovak geographers also joined these trends, after an absence of approximately ten years (the 1990s), and so they are not falling behind the Anglo-Saxon world anymore (see for example, some comprehensive monographs: Mitríková, 2008; Szczyrba, 2005; Spilková 2012, 2016; Kunc et al., 2013; Križan and Lauko, 2014 or Trembošová et al., 2016).

3. This Special Issue: "Contemporary retail environments: Shopping behaviour, consumer preferences, retailing and geomarketing"

The contributions to this Special Issue have a common denominator: retailing – or, perhaps, the consumers. Other key elements are the geographical attitude and perspectives. The texts are not entirely isolated within one research domain, as they partly touch upon the fields of Sociology, Ecology or Management, as well as Geography, all of which are naturally inter-connected in studies of the retail environment.

Most of the contributions report on work on European retail landscapes. Although not explicitly part of any author's mandate, we trust that readers will make some of the inevitable comparisons with the Western European research that we have identified above.

In the first paper, Pedro Guimarães explores the dynamics of shopping centres in Lisbon, with respect to their flexibility and power to liquidate other retail businesses, as well as their weaknesses which can lead to bankruptcy and loss of viability. The resilience of shopping centres to potential failure is thus a crucial aspect of this study. The field research and analyses of the case studies and interviews with managers in the chosen functional centres, deemed as resilient in the context of all shopping centres in Lisbon, contributed to the findings that a wide range of strategic measures may be applied, which are then able to strengthen the importance of the management of the structures in the shopping centres and secure their viability in the present, dynamically developing and changing retail environment. Even though the retail market in Eastern Europe is not yet over-saturated with shopping centres, we may assume that such a situation is about to happen. This excellent contribution proposes some strategic solutions for dealing with such situations.

Dan-Cristian Dabija, Brîndușa Bejan and David Grant study the impacts of ecological thinking on the loyalty of the consumers in selected regions in Romania in the second paper. The increasing interest of consumers in buying green or sustainable products, their ideas on responsible consumption and on environmental protection and the preservation of resources, form the central elements of the text. Based on extensive field research in three regions (Crișana, Centru and Banat), the authors infer that Romanian retailers win over their customers and their loyalty by adopting strategies based on the principles of sustainability. The results show that awareness of the ecological aspects of consumption is growing among the residents of Eastern Europe, along with their abilities to accept ecological behaviours, in similar ways as previously happened to their Western counterparts.

In our third paper, Jana Spilková proposes in her inquiry about the Czech retail environment, to test a timeless motto: "Tell me where you shop, and I will tell you who you are". Over many many years, consumers in the post-socialist countries had limited chances of shopping and their shopping behaviours could be regarded as relatively "unified". At present, with the arrival of new possibilities for shopping, as shown in this study, there are significant differences between the customers of various retail formats. By analysing an extensive sample of the Czech population (more than 3,000 respondents), the author discovers that there are significant differences between the customers of various retail formats (traditional, large-scale, or alternative outlets), and that such alternative ways of shopping are among the most important factors that characterise Czech customers today. Thus, in Eastern Europe alternative food networks have become an inseparable part of the retail food environment.

The comparison, analysis and interpretation of the shopping behaviours of teenagers and seniors (surveying almost one thousand respondents) in five selected shopping centres in Bratislava (Slovakia) is the aim of the article by František Križan, Kristína Bilková, Josef Kunc, Michaela Sládeková Madajová, Milan Zeman, Pavol Kita and Petr Barlík in the fourth contribution to this Special Issue. The authors focus on the perception of shopping centres by both population groups with respect to time, social and financial aspects. Spatial aspects using the principle of concentric zones are emphasised. In the context of the variables under study in this research, results show that teenagers in Bratislava are not sensitive consumers compared to the seniors. The teenagers perceive the shopping centres as a common part of their consumption, if not their lives; the seniors, to the contrary, perceive the shopping centres less positively and they spend less time there.

For the fifth contribution to this Special Issue, post-soviet European space is represented by a comparative study by Konstantin Axenov, Dovilė Krupickaitė, Kira Morachevskaya and Andrey Zinovyev. Using the examples of Saint Petersburg and Vilnius, they investigate the contrasting developmental stages of "retail expansion" as one of the important processes that re-shaped the former socialist urban environments. The authors employ a comparison of data from the socialist economy of the late 1980s to that of the present time. The last 25 years of the development of the urban environment indicates, on the one hand, a similar or rather an identical path (path dependency) regarding the structural changes of the retail sector, the same as it was with the cities in Western Europe. On the other hand, however, it refers to some of the uniqueness of post-socialist development in urban retail environments.

As an exception to our "European landscapes" orientation, the sixth contribution to this Issue is a study by Sina Hardaker, who highlights the efforts of German discount retail food stores to expand into the largest retail market in the world – the Chinese market. Despite the obvious successes of the German discount stores Aldi and Lidl in recent years (especially as a form of on-line shops), they do not (yet) have any physical (i.e. geographically located) store in the country. Interviews with managers of international retail sellers revealed the main reasons why German (and other) discount concepts did not win any major support in the Chinese market. The companies generally prefer to enter such markets that are highly attractive, with a low market risk and where they can enjoy a competitive advantage, all of which is not quite possible in the Chinese retail market with its consumer preferences.

A broad spectrum of authors from geographically, economically and socio-culturally diverse countries across Europe (and beyond) have presented texts that are highly topical and cover major contemporary key topics concerning (not only) European retailing. They then have uncovered new trends and challenges related not only to the dynamic development of retailing in post-socialist Europe but also in referring to a range of relevant issues related to the increasingly globalised economy:

- changes in the shopping behaviour and shopping habits of the consumers (population groups);
- differences between alternative and traditional types of stores and consumer habits and preferences of the customers;
- influences of ecological thinking (green marketing) on the preferences and loyalty of customers;
- differences and similarities in the development of urban retail structures;
- new strategies for the management of shopping centres guaranteeing viability in the period of economic stagnation; and
- the possibilities and problems related to retail chains entering new markets (China).

We believe that the topics that we have covered in this Special Issue will lead to further popularisation and awareness of research activities on the retail environment, and will hopefully provoke a constructive discussion concerning these dynamically developing interdisciplinary topics.

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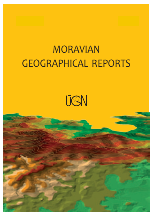

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The resilience of shopping centres: An analysis of retail resilience strategies in Lisbon, Portugal

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Abstract

Retail is a dynamic sector and for several decades shopping centres have been the most successful format. Although such shopping centres have been held responsible for the decline of other retail concepts, they are not without problems and some retail precincts are losing their viability, becoming dead malls. Some other shopping centres however are quite resilient. In this study we analyse the different retail resilience strategies used by older shopping centres to overcome their declining trend. For empirical evidence we adopt a case study methodology and fieldwork to investigate the evolution of all old shopping centres in Lisbon, confirming that a general trend of decline is affecting a large majority of those retail precincts. Refining our analysis, we interviewed managers from three shopping centres that remain viable. We conclude that a wide range of strategies can be implemented, all of which enhance the relevance of the shopping centre management structures.

Keywords: *Resilience strategies, shopping centres, retailing, dead malls, greyfields, Portugal*

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1. Introduction

The retail sector has been characterised throughout history by its dynamism, contributing to a significant number of transformations in cities. Looking back, we can see the passage from a more itinerant retailing, held at fairs, markets and temporary venues, to newer landscapes dominated by permanent or long-standing locations. In terms of concepts, retail practised in fairs and open-air markets began to be connoted negatively, due to the modernity that new concepts progressively introduced into the sector. For example, the appearance and dissemination of hypermarkets in France provoked significant changes in the retail structure of that country (Colla, 2003; Metton, 1995). Other concepts such as 'hard-discount' or the *fachmarkt* (Pereira et al., 2002) were also relevant in modernising the retail sector, in this case in Germany. In a more comprehensive view, shopping centres have been the most successful concept because, generally, they were able to stay on top of consumer preferences since their inception to the present day. Although with world-wide presence, the shopping centre designation itself has covered very different retail precincts, from small ones located in the dense urban fabric, such as the shopping arcades in Paris, to the larger shopping centres located on the outskirts of medium and large-sized cities.

Over the last few decades, these retail precincts have been held responsible for the declining vitality and viability of town centres (Ozuduru et al., 2014; Teller, 2008), in a process that according to Guy (2007) begins with the opening of a new off-centre shopping centre, leading to an increase of vacant shop units and a worsening environment of the town centre. One of the major scientific concerns on this subject has addressed the relations between the large peripheral shopping centres and the traditional and consolidated town centres (Evers, 2006; Guimarães, 2014; Guy, 1998; Thomas and Bromley, 2002). Despite the success that has culminated in negative impacts on other retail concepts, shopping centres are by no means immune to failure and several retail premises have closed or are on the edge of such a fate. The use of the term "dead malls" reflects this evidence and has been particularly applied to describe the "closed or on the verge of closing" (Ferreira and Paiva, 2017, p. 5) suburban shopping centres in North America.

When compared to Europe, the phenomenon of dead malls is at a more advanced stage (Feronti, 2003) in the North American context, and since the dawn of the new millennium the number of dead malls has been reaching alarming levels there (Cavoto and Limonta, 2013). In Europe, because of delays in the dissemination of shopping centres, dead malls are starting to gain the attention of urban planners. In fact, their decline is significant regardless of locations closer to or farther away from consolidated urban and town centres. Still, after experiencing some sort of shock, some retail precincts can overcome the problems and remain viable.

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Appealing to resilience theory, currently widely used in several different contexts, in this article we aim to understand the strategies that contribute to the resilience of shopping centres so that they have managed to keep operating, thus contributing to the vitality of urban centres. As empirical evidence of such resilience strategies, we will use the city of Lisbon as a case study. Our research is guided by a set of research questions: What is the current situation of the shopping centres operating in Lisbon compared to the base-line year 1999? What have been the resilience features introduced for the ones still operating? We argue that despite sharing many similarities, it is the dynamism of the shopping centres' management structures (i.e. [and hereinafter] the managers themselves {sometimes referred to simply as 'management'} as much as their organisational aspects) that have fostered their resilience.

In the next section we will analyse resilience, the main concept used in our argument. In the third section we present the materials and methods used in this research, framing the following section, in which we analyse the evolution of the shopping centres in Lisbon that were already operating in 1999, subsequently deepening our focus to three shopping centres where we discuss their resilience strategies. Finally, some conclusions will be drawn.

2. Theoretical background

2.1 The dual role of shopping centres

The strong relationships between cities and their commercial fabrics result in webs of interactions, through which both are influenced by each other. Shopping centres are an example of such relations and can be better exemplified through two different roles: actor and victim, as described below.

The role of actor is characterised by their capacity to increase the vitality and viability of a certain area. Recent examples of such a role include several urban regeneration projects that used shopping centres as anchors to regenerate town centres (Jayne, 2006; Lowe, 2005, 2007). This protection of town centres is partially due to the local population's (not necessarily resident) and tourists' valuation of these areas (Guimarães, 2013). In this role, shopping centres are important when they are built in peripheral areas, by providing the local population with spaces where they can supply themselves. In fact, shopping centres are relevant facilities that contribute to the supply of population (especially in the period where there is a loss of importance of town centres and simultaneous suburbanisation).

Additionally, when located in deprived areas, shopping centres often provide social functions for local communities. As stated by Parlette and Cowen (2011, p. 795), "while privately owned and managed, enclosed malls in inner suburbs are at times the only indoor spaces that offer some degree of public access". This is in line with De Simone's (2018, p. 13) reflections about Parque Arauco, a large shopping centre that opened in Chile in 1982, seen as a place where people go to "chat, walk, play, and not necessarily buy" (author's translation). Furthermore, despite criticism about the privatisation of public space caused by shopping centres, Chiodelli and Moroni (2015, p. 40) concluded that "shopping malls do not necessarily privatise any public space" and that in most cases, the construction of shopping centres is made on private land that would rarely have some sort of public use.

Shopping centres were also relevant in the modernisation of the retail system and in increasing the retail fabric, usually with longer opening hours, which overall benefited a significant part of the population. Furthermore, by possessing management structure, they contributed to introduce this feature into the retail sector. According to Lewis (2014), there are four major roles of the shopping centre management structure: Operations, Marketing, Administration, and Executive & Other disciplines. The existence of a management structure is clearly one of the factors that, in general terms, differentiate shopping centres from traditional high street retail. Its influence on the resilience of shopping centres will be scrutinised in the section devoted to the empirical analysis, below.

The role of victim occurs when a certain urban area is deprived of their main elements of attractiveness and declines, weakening the viability of existing retail outlets. Paradoxically, this deprivation is provoked by urban changes which, occasionally, happen because private retail developers invest in different areas. The most iconic example is the implementation of shopping centres in peripheral areas and their impact on town centres. Nevertheless, as mentioned above, the evolution of retail also provokes impacts on already existing shopping centres. Concretely, urban sprawl in North America is provoking the constant opening of new shopping centres in increasingly remote locations. Such an evolution has been putting into question the viability of older shopping centres, resulting in their decline and eventually leading to the appearance of dead malls. According to Parlette and Cowen (2011, p. 795), this process derives from the "capitalist cycle of investment, disinvestment and re-investment". These authors show how the dissemination of big box stores and the revitalisation of central areas of cities contributed to the loss of importance of some suburban shopping centres.

In a similar way, focusing on the Greater Toronto Area, Hernandez (2003) and Jones and Doucet (2001) confirmed the negative impacts of some big box stores on the traditional retail structure of that region. According to these authors, their emergence as major retail destinations "left some shopping centres and many of their tenants in vulnerable positions" (2001, p. 507). The dynamism of shopping centres was also one of the main reasons that resulted in the decline of some retail premises, i.e. "competition from newer, bigger and brighter malls has resulted in declining sales and high store vacancy rates in first ring suburban shopping centres" (Feronti, 2003, p. x), representing the adaptive behaviour drawn from Darwin's natural selection concept as discussed by Lowry (1997). Other structural factors have been held responsible for dead malls, such as the dissemination of outlet malls, the rising importance of e-commerce (Schatzman, 2013), and more recently the "tightening of consumer spending and the de-valuation of commercial real estate in the United States as a result of the global financial crisis" (Scharoun, 2012, p. 110). The work of Lowry (1997) on the life cycle of shopping centres can also help to explain the evolution of those retail precincts. According to this author, four stages characterise this cycle: innovation, accelerated development, maturity and decline (see Tab. 1).

Due to several interconnected reasons, such as their location in relation to the main urban centres and size of the urbanised area where shopping centres are located, the retail precincts that have closed doors or are in full process of decline are now a pressing challenge for urban planning. This situation of a decline is not, however, inevitable. Some

Considerations	Stages			
	Innovation	Accelerated development	Maturity	Decline
Number of competing centres	very few	rapid growth	many of the same type of centre	many same and newer types
Vacancy rate	low	very low	moderate	high
Renovation of facilities	none	minor modifications	maintenance of existing facilities	neglect or extensive reformatting
Control exerted by developers	extensive	moderate	extensive	moderate

Tab. 1: Some considerations of Lowry's shopping centre life cycle stages
Source: After Lowry (1997)

of those retail precincts have managed to remain viable and continue with the doors open, thus continuing to be a valid asset of the retail structure in the urban area in which they are inserted. Lowry (1997) claims that survival strategies must be adopted by developers, which will be analysed further as resilience strategies in this article.

2.2 The concept of resilience and its importance for understanding changes in retailing

The concept of resilience has been used and adapted from different perspectives and research traditions. According to Pizzo (2015), it is possible to trace the first use of the word to the 1st century BC. The concept of resilience, however, was further developed with its incorporation in the analysis of ecological systems (Dolega and Celińska-Janowicz, 2015), and especially through the outstanding work of C. S. Holling. This author defined resilience as a "measure of the persistence of systems and of their ability to absorb change and disturbance and still maintain the same relationships between populations or state variables" (Holling, 1973, p. 14). In time, resilience has been incorporated into social science studies (Martin, 2012). Although it is a concept that has been used for some time, it has been gaining increasing relevance today. Its flexibility and the fuzzy ways to measure it partially explain its utility to understand and account for very different realities: for example, Adger's (2000) comparison of social and ecological resilience; Pisano's (2012) analysis of sustainable development through the lens of resilience; and Pizzo's (2015) discussion of the concept in planning theory and practice.

Some of the literature on regional development has also included the concept of resilience: for example, Hudson's (2010) work on the characteristics of resilient regions, and Hassink's (2010) research on the relations between regional resilience and regional economic adaptability. Resilience was also a key concept for Forino (2015) in his analysis of L'Aquila, a small town in southern Italy, following the earthquake that took place in 2009. Martin (2012) points out that a succession of major natural and environmental disasters and the subsequent reaction of local communities, fostered interest in the study of resilience as a concept able to explain different phenomena and events. The need for a certain system to adapt itself and be resilient implies the existence of a certain trigger. According to its temporal impact, Erkip (2015) distinguished two different kinds of trigger: "shocks" (pulse), which can be exemplified by events such as earthquakes; and "slow-burn changes", that fit the analysis of complex urban systems and their dynamism, because changes are continuously introduced into cities.

When considering the concept of resilience, three different interpretations can be distinguished and used for a study of retail resilience: the engineering, ecological and adaptive approaches (Martin, 2012). The first, engineering approach is one "in which resilience is regarded as a response to external disturbances and a move back to a steady state" (Boschma, 2015, p. 734), wherein the system will tend to equilibrium. To characterise this situation Wrigley and Dolega (2011) use the term "bounce back", which is to some extent related to the resistance to changes. The second interpretation follows an ecological approach and it "focuses on the scale of shock a system can absorb before it is destabilised and moved to a new configuration" (Dolega and Celińska-Janowicz, 2015, p. 12). Contrary to the engineering approach where the focus is on the ability of a certain system to resume to its pre-shock state, the ecological approach focuses on how much shock can the system support (Wrigley and Dolega, 2011). Finally, the third interpretation refers to the adaptive approach and follows an evolutionary stance. In this case, the system will be different when comparing the stage pre-disturbance to the stage when resilience is accomplished. For this matter, Wrigley and Brookes (2014) use the term "bounce forward" to describe the approach. It means the system will end up a step forward with respect to its starting point.

This adaptive capacity is particularly important in the study of urban systems. Earlier, Holling (2001) had already enhanced this feature, considering adaptive capacity as "the resilience of the system, a measure of its vulnerability to unexpected or unpredictable shocks". The changing nature of urban areas makes it virtually impossible to analyse them from a stability perspective. Simmie and Martin (2010) point this out when stating that "regional and local economic development is far from a smooth and incremental process but is subject to all sorts of interruptions and disruptions". Thus, resilience acquires relevance as a useful concept to uncover and understand the complex and continuous process of changes that characterise cities. From an urban planning standpoint, the use of resilience from an adaptive point of view is preferred, rather than the bounce back perspective. The use of the latter method could lead to the constant obsolescence of policies almost immediately after their implementation.

Because it can be an asset in understanding urban problems, the concept of resilience has been used to analyse how town centres and retail stores have managed to deal with the transformation of the retail sector. In this context, some research has been carried out (Barata-Salgueiro and Erkip,2014; Cachinho, 2014; D'Alessandro, 2015; Erkip, 2015; Karrholm et al., 2014; Wrigley and Brookes, 2014; Wrigley and Dolega, 2011). Moreover, a recent Urban-Net European funded project – REPLACIS, Retail Planning for Cities Sustainability – devoted to the resilience of town centres, defined urban retail resilience as "the ability of different types of retailing at different scales, to adapt to changes, crises or shock that challenge the system's equilibrium, without failing to perform its functions in a sustainable way" (Barata-Salgueiro, 2011, p. 30).

More attention has been given to the resilience of town centres, rather than on the resilience of retail stores and specific retail concepts, because a retailer's strategies, as studied by Erkip et al. (2014), can only partially explain the evolution of a certain centre (Teller et al., 2016). Thus, the scientific discussion revolved around the ability of town centres to remain an important retail destination within the respective urban region where they are located. For instance, the works of Wrigley and Brookes (2014) and Wrigley and Dolega (2011) are good examples of such research in British research on the subject. In the former, an edited collection contains several chapters that focus on the evolution of high streets, seen through the lens of resilience. Other researchers have focused on different geographical contexts: for example, the Cities special issue on retail planning and urban resilience (Barata-Salgueiro and Erkip, 2014) presented case studies from other countries, such as Portugal (Cachinho, 2014), Sweden (Karrholm et al., 2014), Turkey (Erkip et al., 2014; Ozuduru et al., 2014) and the United States (Balsas, 2014).

When dealing with the resilience of town centres, several factors have been introduced to explain why some areas have managed to be resilient while others failed. In this perspective, resilience is understood from the adaptive perspective as the ability of a certain system (here, the urban retail system) to comply and absorb changes and shocks and to restructure itself to still perform its functions in an improved way (here, to fulfil the provision of consumers). In the work of Wrigley and Brookes (2014), two major dimensions are analysed: public policies (Findlay and Sparks, 2014); and the governance of town centres (Coca-Stefaniak and Carroll, 2014). Besides these two factors, Cachinho and Barata-Salgueiro (2016) considered urban space attributes and the internal features of the urban retail system as crucial for its resilience.

Although increasing theoretical debates are found in the scientific literature, there is a lack of empirical evidence documenting the main features that contribute to the resilience of urban systems, in general, and especially urban retail systems. Although it was focused on the resilience of retail stores, the study of Erkip et al. (2014) is an exception. In this work, a survey of retailers in Ankara, Turkey, concluded that the relevance of strategies, such as the introduction of home delivery or private service buses, added services to the client, physical improvements and involvement in associations. With respect to the capacity of shopping centres to be resilient, the literature is even scarcer. Still, because of the size and location of most of these retail precincts, the inability of even just one shopping centre to be resilient and thus decline and close their operation, is a significant urban planning problem. Regarding the subject of dead malls, a study from the Congress for the New Urbanism (2001) found that shopping centre owners managed to requalify abandoned shopping centres into back offices or data centres. In several of these cases, although the former retail precinct lost its civic role, the building managed to maintain some value as a real estate asset. Focusing on the shopping centre Roma in Lisbon, Ferreira (2015) concluded that the vitality of the shopping district, its accessibility and the management structure of the shopping centre was crucial in its revitalisation. In this case study, we intend to contribute to the scientific literature by analysing the strategies that contributed to the resilience of some shopping centres in Lisbon.

3. Material and methods

To respond our research questions and make inferences about our argument, we use Lisbon as an empirical case study. As a baseline, we consider shopping centres located in Lisbon that were operating in 1999, as the database that supported this study was collected in 1999 by Observatório do Comércio (2000). This database was updated through fieldwork developed by the author in 2017. This updating allowed us to document the evolution of shopping centres in Lisbon to answer the first research question. Elaborating on the work of Ferreira (2015), we classified shopping centres according to four major categories:

1. vital – referring to shopping centres with 9.9% or less vacancy rate;
2. struggling – for shopping centres with vacancy rates between 10.0 and 39.9%;
3. greyfields – for shopping centres with vacancy rates of 40.0% to 69.9%; and
4. dead malls – for the remaining shopping centres with vacancy rates of 70.0% or higher.

Subsequently, we focus the analysis on three shopping centres that are still in operation and which have considerable momentum. Using structured open-ended interviews, the manager of each of the shopping centres was interviewed. Under this category of interviewing, the same questions were asked to the three interviewees to "increase the comparability of responses" (Kitchin and Tate, 2000, p. 214). After proper ethical consent, all interviews involved audio recording and subsequent transcription. The questions that were asked can be summarised as the following general topics: a description of the shopping centre and its origins; the existence in the past of a decline phase, its causes and resilience strategies; the main current threats to existence; the current resilience strategies; the evolution of customer-target objectives; and other relevant (for the interviewee) information.

4. Results: Shopping centres in Lisbon

4.1 Background

Shopping centres emerged in Portugal in the 1970s, although it was in the following two decades that the concept witnessed its most significant dissemination (Guimarães, 2015). Nevertheless, in these earlier stages, shopping centres were characterised by their small size, their integration into the urban fabric, and the lack of a professional management structure: in fact, their organisational structure resembled a commercial condominium (Teixeira, 2014).

As in the Turkish case analysed by Erkip and Ozuduru (2015), the emergence of a new generation of shopping centres also contributed to the decline of the oldest retail precincts in Portugal. Ferreira (2015) identified three variables that may have contributed to the decline of shopping centres in the Lisbon region: the physical structure of the retail precints, not adapted to newer requirements of consumption and leisure; the knowledge levels of their managers; and the management structures of those retail premises. The latter variable is related to the fact that parts of the shopping centres were in fact commercial condominiums (Ferreira and Paiva, 2017), where each store was sold individually to different retailers, which transformed shopping centres into a mere real estate development.

Contrary to the North American context, where big box stores and power centres (in the European context – retail parks) contributed to the decline of some shopping centres (Jones and Doucet, 2001), in Portuguese retail structure there is not such a tradition of category killers. Ikea is the most well-known exception with five stores in the country (covering the two metropolitan areas of Lisbon and Oporto [each with two stores] and another one in Algarve). Besides, some international companies are established in big box stores such as Decathlon, Leroy Merlin, Staples or Media Markt. Additionally, some retail parks were constructed in several Portuguese cities in this millennium, but their relevance never reached a status that could put into the question the already consolidated retail system.

In 1999, 55 shopping centres (Fig. 1) were operating within the boundaries of Lisbon municipality (Observatório do Comércio, 2000), 10 of which were opened in the 1970s, 27 in the 1980s and 18 in the 1990s. Their characteristics reveal the fragility of the Lisbon shopping centres industry at the verge of the new millennium. This fragility was further put to the test after the mid-1990s with the emergence of new regional shopping centres. Although the majority of the old shopping centres had a management structure, in several cases it merely consisted of shopkeepers' commissions without professional management. They were mainly seen as real estate developments, rather than integrated commercial developments, evidenced by the fact that 40% of the retail precincts operated with a mix of rent and own store ownership (see Tab. 2). Other indicators also point in this direction, such as the absence of a planned tenant mix, anchor stores and franchising stores. The small size of shopping centres is, to a certain extent, a consequence of their location in the densely urbanised town centres or in its surroundings, as well as their implementation in pre-existent buildings. Even when the building was built for that purpose, it had to face the obvious limitations of its location in very urbanised, densely populated areas. Consequently, the majority of shopping centres fit the Portuguese Association of Shopping Centres (APCC, 2011) definition of "very small" with 500 to 4,999 sq. metres of sales area (classification adapted from the International Council of Shopping Centres). Furthermore, the motorisation rate had escalated quickly in the last two decades of the 20th century, such that shopping centres that did not possess parking spaces (58.2% of the total shopping centres) quickly became outdated.

In these 55 shopping centres, three with regional catchment areas are included: Amoreiras, the first regional shopping centre in the Lisbon region, opened in 1985; Colombo, inaugurated in 1997 in a residential neighbourhood with good road connections; and Vasco da Gama, opened in 1999 following the urban renovation project in the eastern part of the city where the 1998 Lisbon World Exposition took place. Together with the opening of other shopping centres in the mid- and late-1990s with a sales area up to 15,000 sq. metres, such as Olivais, they represented a new generation of shopping centres that would put into question the viability of the pre-existent retail precincts, including those also opened in this period but without any kind of innovations when compared with those already existing. Based on these data and taking Lowry's life cycle thesis (Tab. 1) into consideration, one may argue that in the last three decades of the 20th century the Lisbon shopping centre industry went very quickly from the innovation stage to the accelerated

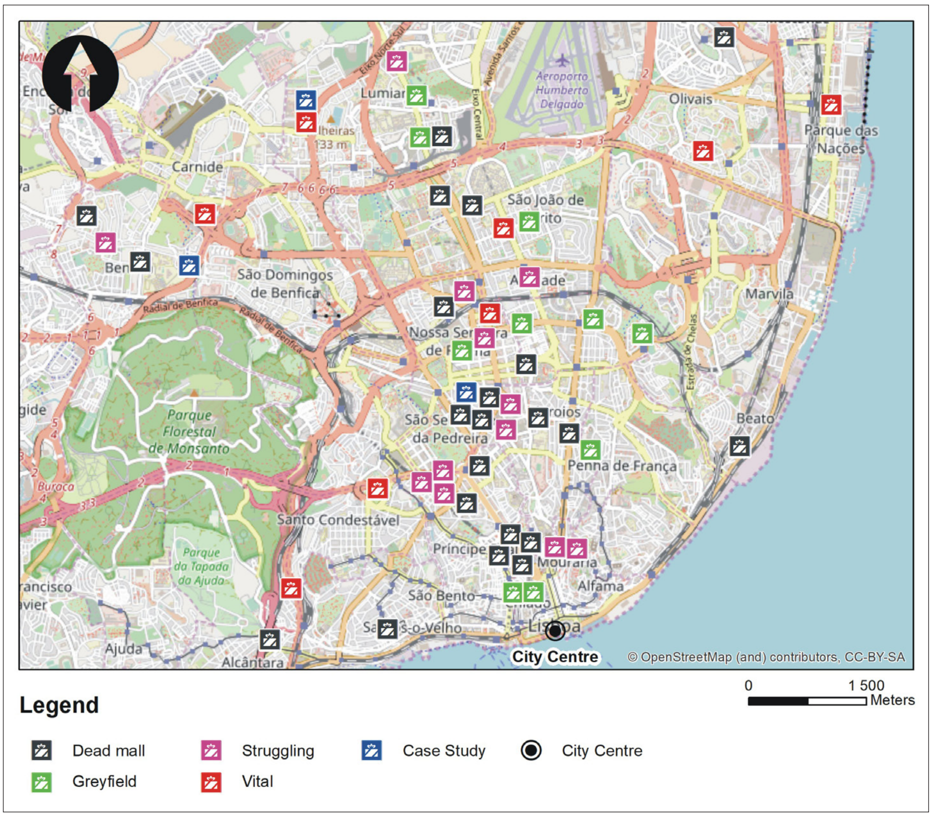

Fig. 1: Location and characteristics of Lisbon shopping centres
Source: author's fieldwork (2017)

Characteristics		**Number**	**%**
Management Structure	Yes	52	94.5
	No	3	5.5
Parking	Yes	18	32.7
	No	32	58.2
	No data available	5	9.1
Planned tenant mix	Yes	27	49.1
	No	27	49.1
	No data available	1	1.8
Anchor stores	Yes	21	38.2
	No	32	58.2
	No data available	2	3.6
Sale area	Very small (500 – 4,999 sq. metres)	46	83.6
	Small (5,000 – 19,999 sq. metres)	5	9.1
	Medium (20,000 – 39,999 sq. metres)	2	3.6
	Large (40,000 – 79,999 sq. metres)	1	1.8
	Very large (> 80,000 sq. metres)	1	1.8
Food and drinks	0 – 5 stores	41	74.5
	6 – 10 stores	6	10.9
	More than 10 stores	8	14.5
Stores ownership	Rent	27	49.1
	Purchase	1	1.8
	Mix system	22	40.0
	No data available	5	9.1
Form of management	Shopkeepers commission	12	21.8
	Management company	43	78.2
Building type	Adapted	15	27.3
	Built on purpose	37	67.3
	No data available	3	5.5
Number of stores	50 or less	37	67.3
	51 – 100	14	25.5
	100 or more	4	7.3
Opening year (by decade)	1970's	10	18.2
	1980's	27	49.1
	1990's	18	32.7
Vacant stores (%)	0 – 9.9	21	38.0
	10 – 39.9	24	44.0
	40 – 69.9	6	11.0
	70 and more	4	7.0
Location	City centre	8	14.5
	City centre expansion axis	27	49.1
	Residential neighbourhood	14	25.5
	Periphery	2	3.6
	New developments (periphery)	2	3.6
	No data available	2	3.6
Franchising	Yes	20	36.4
	No	33	60.0
	No data available	2	3.6

Tab. 2: Characteristics of shopping centres operating in Lisbon municipality in 1999
Source: Observatório do comércio (2000)

development and maturity stages, mostly because there was a significant growth in the number of shopping centres and the vacancy rates in 1999 were already substantial.

The data analysed below inform us how many of those shopping centres entered into the decline stage and were not able to reverse the situation, becoming dead malls, and how many of them did manage to circumvent that stage or, if reached, emerge from it, being resilient.

4.2 Evolution of shopping centres

In general terms, the shopping centres in Lisbon had already experienced some decline by 1999 (see Tab. 3). Still, this trend worsened further by 2017. The number of physical spaces for stores suffered a significant decrease, from 3,106 in 1999 to 2,382 in 2017. Two reasons can be used to explain this evolution. The first concerns readjustments in the physical layout of stores. Taking advantage of decreases in rental prices, some retailers grouped several stores into one (in this way, the overall retail floorspace remained equal). The second is related to the option of management to close several floors of the shopping centres due to the high or absolute vacancy rates that were being felt (in this case, there is an effective loss of available retail floorspace in the precinct). Following the same trend of decline, the number of occupied stores suffered a significant loss. In total, the 55 shopping centres lost almost one-third of the number of stores operating in 1999. Taking all things together, the vacancy rate increased from 15.7% to 24.9%, meaning that in 2017, one in four stores was closed.

These already worrying changes already take into consideration the two measures outlined above that diminished the available stores, which only serves to cover the real dimensions of the problem. Hence, if one considers the stores that were currently operating in 2017 and the physical spaces available for stores in 1999, we reach a vacancy rate of 42.5%. The data reveal that between 1999 and 2017 there was an inversion of the position of shopping centres. If, in 1999, 45 out 55 were still in the stages classified as "vital" and "struggling", in 2017 somewhat less than one half are in those two stages, and only 10 shopping centres had a vacancy rate of less than 10%. The number of shopping centres classified as dead malls increased dramatically from 4 in 1999 to 22 in 2017 (of which 15 were effectively closed and the remaining 7 had vacancy rates higher than 70%).

4.3 Resilience features

To uncover the resilience strategies developed by shopping centre management structures, interviews were conducted with managers of three shopping centres still operating and with considerable momentum, which constituted one of the reasons why they were selected. Other reasons were also considered, namely the existence of a management structure and the respective manager, with whom we could conduct the interview. Besides, the three larger shopping centres of Colombo, Vasco da Gama and Amoreiras were not considered because they are still three of the larger shopping centres in the region and their position has not been threatened by the regional evolution of retail. Additionally, shopping centres that currently fit the category of dead mall were also not considered because, even if resilience strategies were implemented, apparently they were not successful. Thus, taking in consideration these parameters, interviews were conducted with managers of the following shopping centres: Dolce Vita Monumental (DVM), Fonte Nova (FN) and Pingo Doce de Telheiras (PDT) (see Tab. 4). According to the APCC shopping centres classification, the first two had a "very small" sales area, while the other had a "small" sales area.

4.3.1 Dolce Vita Monumental

This precinct is located closest to the city centre, in the new Lisbon CBD and in close proximity to other shopping centres. It is located in an historical building that was designed and built to host a theatre and a cinema. Named "Cine-Teatro Monumental", it was inaugurated in 1951. Due to the opening of other new cinemas in the city and the increased importance of television, this cultural space declined in the 1970s and eventually closed in the early 1980s. After some rehabilitation work that changed its facade significantly, the building was reopened as a shopping centre in 1993, retaining the name "Monumental" as a remnant of its previous function but presenting similar features to those of the most recent shopping centres (Tab. 4). Since then, major changes have occurred in 2005 and 2006 when the retail developers Amorim Imobiliária (first) and Chamartin Imobiliária (secondly) acquired this shopping centre. When the latter company took possession of the precinct, the first major change took place: "Dolce Vita", a brand that the company had already used in other shopping centres, was introduced into the Monumental, thus renamed as Dolce Vita Monumental. Recognising that this shopping centre was outdated, alongside the rebranding, major in-depth modifications were made in 2007 to its physical structure and layout, which required its closure for three months:

> "We took advantage of the three months in which the shopping centre was closed to expand the food court area and moved some stores that were on the lower floor to the top floor (strategic change to reformulate the tenant mix layout). We start from the premise that a centrally-located shopping centre such as Monumental would have to have a strong food court area". (Retrieved from the interview: author's translation).

		1999	2017	Change
Total of stores		3,106	2,382	– 23.3
Total of occupied stores		2,619	1,787	– 31.8
Vacant stores (total)		487	595	22.2
Vacancy rate (%)		15.7	24.9	9.3
Number of shopping centres according to the vacancy rate	Vital (< 10%)	21	10	– 11.0
	Struggling (10–39.9%)	24	13	– 11.0
	Greyfields (40–69.9%)	6	10	4.0
	Dead malls (> 70%)	4	7 + 15	18.0

Tab. 3: Evolution of analysed shopping centres in Lisbon
Sources: Observatório do comércio (1999); compiled from author's fieldwork (2017)

		Opening year	Dolce Vita Monumental	Fonte Nova	Pingo Doce Telheiras
Stores	Physical spaces	1999	33	78	25
		2017	33	65	17
	In use	1999	33	76	23
		2017	30	58	17
	Vacant	1999	0	2	2
		2017	3	7	0
	Vacancy rate	1999	0	2.6	8
		2017	9.1	10.8	0
Planned tenant mix (1999; 2017)			Yes; Yes	Yes; Yes	Yes; Yes
Food court (1999; 2017)			Yes; Yes	Yes; Yes	Yes; Yes
Stores ownership (1999; 2017)			Rent; Rent	Rent; Rent	Rent; Rent
Location (1999; 2017)			City centre expansion axis	Residential neighbourhood	Residential neighbourhood
Anchor stores (1999; 2017)			Yes; Yes	Yes; Yes	Yes; Yes
Parking (1999; 2017)			Yes; Yes	No; Yes	Yes; Yes
Management structure (1999; 2017)			Management company	Management company	Management company

Tab. 4: Main features of the three shopping centres analysed in depth
Sources: Adapted from Observatório do Comércio (2000); author's fieldwork (2017)

The cultural heritage associated with the location of DVM was seen as an advantage. Hence, the cinema was maintained, mainly attracting a specific audience. Furthermore, because this is a very small retail precinct, the management structure is aware that it cannot attract anchor stores – thus, the cinema itself is the anchor. The main change occurred in the food court. Before 2007 rehabilitation works, the ground floor possessed several non-food stores. These stores were then moved to the upper floor and, subsequently, the food court was enlarged on the ground floor. This change was carried out by management based on the principle that a central shopping centre must possess a strong offer of food stores in order to attract nearby workers. During the rehabilitation work, several stores that were underperforming were displaced from the DVM to give place to other stores that would attract more visitors, increasing the overall quality of the tenant mix. The DVM customer-type remained the same: the goal was to attract more people of the same type. After that period, the changes performed on DVM are shallower:

> "Since 2007, investments are constant – now-a-days it is not viable to close a shopping centre for 3 months – the strategy is to improve progressively: in lighting, in the entrance, sofas. Clients like to see changes" (Retrieved from the interview: author's translation).

According to the manager this allows the costumer to continuously see some modernisation efforts, even if small, keeping the attractiveness of the shopping centre. Another relevant issue is the 6-years duration of the lease:

> "Simply renewing contracts without this implying a renovation of the store's image is no solution. When the time for the contract renewal arrives, it is the ideal time to renew the store layout" (Retrieved from the interview: author's translation).

This duration of the lease is considered enough for stores to obtain profit after modernisation investments. It is expected that stores reach break-even in a period of 2 to 3 years, having about 3 years of profit, after which they must be prepared to make new investments. For the shopping centre management structure, this contract duration provides a significant margin of negotiation, forcing, when necessary, modernisation of the store under the risk of the lease not be renewed.

4.3.2 Fonte Nova

With some 4,481 sq. metres of sales area, this shopping centre is located in the dense residential area of Benfica, near the major green space of the city. It was built as a part of a larger project, which included the construction of residential buildings with a retail precinct on the ground floor. About one decade after the inauguration of Fonte Nova in 1985, this retail precinct began to suffer from the competition of Colombo, a very large shopping centre (122,000 sq. metres of sales area) opened in 1997 and located less than 1km away. Altogether, the opening of several shopping centres in the region and the economic crisis (around 2010 and following years) led to the bankruptcy of several businesses that were operating in Fonte Nova, partially funded with bank loans. The main difficulty in this period was to replace the closing stores with new ones of similar quality. One of the resilience strategies was the introduction of a risk-sharing management strategy:

> "We began to be available to adopt risk sharing (variable rents, dependent on the sales value). If it goes well, it goes well for everyone and, if it goes wrong, it goes wrong for everyone. That is, the onus stopped being just on the side of the tenants" (Retrieved from the interview: author's translation).

According to this strategy, the value of leases became variable, i.e. the rental value became indexed to sales. Thus, the burden was shared between the retailer and the shopping centre administration. In this period, another management strategy was consistency in the selection of new stores for FN. When stores were closing, the option was to resist the pressure and not accept all stores just to keep low vacancy rate:

> "It is better to have a vacant space than a bad store" (Retrieved from the interview: author's translation).

This decision was made to keep certain kinds of stores planned for a specific customer-type and not lowering the quality of the existing tenant mix. Moreover, other strategies were also adopted recently:

> "A shopping centre with 30 years like this has to change something structural. We began to reflect about what could be done to bring in more people and then changed the tenant mix" (Retrieved from the interview: author's translation).

A food court was created to gather the existing (and new) food stores that were dispersed throughout the shopping centre. A gymnasium was recently inaugurated in 2017 in order to increase overall vitality, replacing the former cinema that was operating but with no viability. Taking advantage of the supermarket already located in FN, an enlargement of this store was negotiated in order to increase its attractiveness. Consequently, because with this enlargement it was expected that clients would buy more products, a direct entrance to the car parking (already existent but with no use) was opened. Overall, in order to compete with the shopping centre Colombo and others in the region, the management structure chose to enhance what differentiates FN from others: its convenience, i.e. the possibility to quickly enter the shopping centre, shop and leave.

4.3.3 Pingo Doce de Telheiras

This is a considerably different shopping centre compared to the two discussed above and it is located further away from the city centre. Built in 1996, it is essentially a traditional retail precinct composed of an hypermarket and a small commercial gallery. It owes its name to the current hypermarket that is located here, Pingo Doce. Like several others in the country (Guimarães, 2014), the overall quality of the tenant mix evolved and it became more attractive. As a consequence, this shopping centre is currently less dependent on the hypermarket for attracting consumers. Although located in Telheiras, a densely urbanised neighbourhood, its proximity to several important road connections allows the PDT catchment area to extend well beyond Telheiras. When it was built in 1996, the hypermarket was Feira Nova. Because both Feira Nova and Pingo Doce belong to Jerónimo Martins, a major Portuguese company, a business decision made the conversion of the hypermarkets Feira Nova into Pingo Doce in 2008. In this period, the shopping centre was already experiencing a less vital stage that, roughly, lasted from 2005 to 2010. Despite the awareness of the decline stage, it was chosen to wait for the aforementioned change of brand before major changes were performed, which further enhanced its decline. Thus, in 2010 major rehabilitation works transformed the shopping centre significantly:

> "At the time, in 2010, many shopkeepers left the gallery, many shops were not occupied nor were many interested in renting" (Retrieved from the interview: author's translation).

In this period, several stores were displaced for the reconstruction and there was a lack of new ones to enter PDT. In order to diminish the vacancy rate, several services from the Jerónimo Martins company headquarters were relocated to the empty spaces. In 2015 even stronger rehabilitation works were performed, forcing the closure of the shopping centre between July and November, 2015. Some of the brands that belonged to the Jerónimo Martins company that were being sold inside the hypermarket, left these premises to occupy individual stores (mainly clothes, shoes and wellness). Because they demanded a significant amount of sales area, in some cases the physical space of more than one store was grouped into one, thus maintaining the overall sales areas but diminishing the number of stores and the vacancy rate (which was 0% at the time of the fieldwork in 2017):

> "What we try is that the tenant mix be convenient for the costumer" (Retrieved from the interview: author's translation).

Additionally, the tenant mix was rearranged to include convenience stores, such as a medical clinic and shoemakers. The hypermarket remained as the main anchor store of the shopping centre. With the rearrangement of the tenant mix, the shopping centre management structure clearly intended to place PDT not as a shopping centre with several anchor stores but as a retail precinct with a considerable number of convenience stores (not the retail concept but in what regards to the quick access to the stores). In this particular case, this feature is enhanced by the availability of a free large parking space.

4.4 Summary

Altogether, the adopted strategies in these three shopping centres share some similarities but include some specific elements for each one. As shown in Table 5, the analysis

Shopping centre		**Dolce Vita Monumental**	**Fonte Nova**	**Feira Nova de Telheiras**
Decline situation	Period	2007; 2011	2010–2014	2005–2010
	Causes	Outdated	Economic crisis; competition from new shopping centres	Outdated (coinciding with ownership change)
Resilience strategies	Introduced only occasionally	Physical rehabilitation; Food court enlargement; tenant mix reformulation	Food court enlargement; gymnasium; enlargement of the supermarket; parking lot	Physical rehabilitation; withdrawal of own brands from the hypermarket to the shopping centre stores; union of several stores in one; tenant mix
	Regular	Changes in the tenant mix	Changes in management (risk sharing); tenant mix maintained	Hypermarket constant modernisation features
Threats	Shopping centres nearby	Shopping centres in the Lisbon region	Other hypermarkets	
Strengths	Cultural heritage; convenience	Convenience	Location; convenience	

Tab. 5: Synthesis of the resilience features of the three analysed shopping centres
Source: author's interpretation

reveals a relevant variety of features. The period and causes of the decline situations are different or, at least, never fully coincide. The same happens with the strengths and threats as proclaimed by the interviewees, which reflect the strategic orientations of each of the shopping centres.

Regarding the resilience strategies, we have divided them in two: regular and occasional. In the first case, they refer to measures implemented with some regularity and are mainly interventions at a lower depth, aiming at maintaining the vitality and viability of the retail precinct. In the second case, they refer to in-depth measures with the aim of changing more significantly certain characteristics of the shopping centre. Because of this, these latter interventions were only implemented rarely.

5. Discussion and conclusions

Retailing is a very dynamic sector. Shopping centres have been dominant in this sector for several recent decades. Nevertheless, this does not mean that such shopping centres are not subject to threat (as to existence) and to become obsolete. The designation of dead malls fits such cases. Although evidenced first in the North-American context, this is not a process exclusive to this geographical region. In this article, we aimed to investigate this subject using Lisbon as a case study. The appearance and dissemination of shopping centres in the Lisbon region happened relatively quickly and threatened not only traditional retail located in high streets – but also the viability of older shopping centres.

With respect to our first research question, the base line for: "What is the current situation of the shopping centres operating in Lisbon compared to the base-line year 1999?" – with a few exceptions, the network of shopping centres in Lisbon in 1999 comprised very small retail precincts, the majority of which was mainly real estate developments with scarce or no professional management. Because of this, they were deeply affected by the appearance of new shopping centres, with professional management structures and regional catchment areas. Thus, between 1999 and 2017 the number of "vital" shopping centres diminished from 21 to 10. On the other hand, in 1999 four shopping centres were classified as "dead malls", whereas in 2017, 22 structures fit this category (15 of which were in fact closed). Considering these data, however, the overall vacancy rate did not increase as much as one might have expected (from 15.7% to 24.9%). This not so high increase (as might be expected) is masked by some remodelling, which reduced the number of stores and/or retail floorspace. Faced with the decreasing viability of their retail precincts, the management structures forced the closure of several floors and allowed the physical space of several stores to be assembled. With a decreasing real estate value, during the fieldwork it was possible to realise that the majority of stores that are still open in the less viable shopping centres are occupied with business with low added-value, such as sewing services, shoemakers, insurance companies, real estate agents and others.

Furthermore, these businesses are mostly located on the ground level and in the stores with a showcase for the street. The findings are in line with the conclusions of the Congress for the New Urbanism (2001) regarding the North American context, i.e. although, currently, the majority of shopping centres do not possess a commercial use, their physical space is still seen as a mere real estate product. Thus, spaces are leased as much as possible to all kinds of uses. Taking Lowry's life cycle in consideration, if in 1999 one could consider that the majority of shopping centres were in the maturity stage, in 2017 they have clearly reached the decline stage. Because the aforementioned Lowry life cycle theory (1997) assumes that decline is not inevitable, this evolution means that the management structures of those shopping centres were not able to introduce resilience measures that would prevent the decline of those retail precincts.

To answer our second research question: "What have been the resilience features introduced for the ones still operating?", we have deepened our analysis and focused on three shopping centres. They have differed from the general trend and managed to remain viable in the analysed period. Although with several differences, they share some relevant characteristics: namely, the existence of a planned tenant mix, food court, anchor stores, a professional management structure and the stores ownership being concentrated in one company. It was these common characteristics that appear to be crucial for the resilience of these shopping centres. Parking was also a crucial feature for Dolce Vita Monumental and Pingo Doce Telheiras. The analysis of Fonte Nova also attested to this relevant factor because the construction of access to parking lots (previously not available) was one of the resilience strategies adopted by this shopping centre. Other resilience strategies were incorporated and they also enhance the relevance of a professional management structure. The synthetic information in Table 5 allows us to understand that different strategies can be put in place if the strengths of each shopping centre are taken in consideration. Physical rehabilitation seems to be crucial but just to some extent. If strong transformations were performed in two of the analysed shopping centres, they were carried out as an exceptional measure in order to deeply overcome the negative situations in which they found themselves. Once this stage was completed, it proved to be more effective to continuously develop shallow improvements. The enlargement and rearrangement of the food court was another major strategy, attesting to its current relevance, oriented at a two-fold audience: in the first case, oriented to consumers that work in the vicinities and use the food court for lunch: secondly, leisure-oriented for people that use the shopping centre to walk, shop or just to meet with friends.

The ability to rearrange the tenant mix is another relevant strategy. The chosen case studies show us how this strategy can be used differently. In Dolce Vita Monumental and Pingo Doce de Telheiras, this was a strategy to attract new and better stores for the shopping centre (from the same and different typologies) in order to increase their attractiveness. In Fonte Nova, this strategy was mainly used to control which stores entered into the shopping centre, denying the opening of stores that could lessen the quality of the tenant mix. Nevertheless, in this shopping centre this strategy was also used to incorporate a gymnasium (replacing an outdated and less attractive cinema) and to increase the retail floorspace of the already existing supermarket. Besides these strategies, two more can be demonstrated that are related to the shopping centre business management strategy. In Fonte Nova, following the economic crisis that put into question the viability of some of the existing stores and made it difficult to attract new stores, a sharing risk policy was put into practice, i.e. the rental price became dependent on the value of sales made by the respective store. In Pingo Doce de Telheiras, several own brands that belong to the same owner left the hypermarket and occupied the individual stores of the shopping centre. Overall, it was the relevance of the management structures and their ability to control these elements that dictated the resilience of the shopping centres in this analysis. This control of the tenant mix is only possible if all stores of a given shopping centre belong to the same company, which can, thus, plan what type of store they want in the retail premise or even which ones do not contribute to its proper functioning. In the three case studies, any of the implemented resilience measures would be possible without the existence of a management structure.

Finally, another cross-cutting aspect of the three shopping centres is the intentional strategy of their management structures to make convenience one of its major strengths. Faced with the difficulty of competing with larger and newer retail precincts, the ease and speed with which purchases can be made is seen as an essential component for the viability of the analysed shopping centres. Connecting these findings with the theoretical discussions, it became evident that the adopted resilience strategies fit more than one perspective. The more in-depth measures are more connected with the engineering approach, i.e. the ones that were developed after the shopping centres experienced some decline and had to rearrange themselves to return to an equilibrium status. The adaptive resilience measures are the ones that have been implemented since the in-depth measures. In this case, it seems clear that the management structures are adopting an anticipatory approach, continuously adapting the retail precinct as a way to remain viable.

Now-a-days, the high number of shopping centres that are not vital, according to the classification adopted in this article, is significant. This may raise substantial challenges for urban planning in the near future. Because the problems affecting the majority of shopping centres have a structural nature (mostly due to their physical and management inadequacy), it is predictable that the number of dead malls will increase. Additionally, following the same rationale, one may expect that the majority (if not all) of shopping centres classified as struggling and greyfields will continue to decline, enlarging the number of dead malls, which will give the problem a further dimension. Indeed, because most of such shopping centres were conceived and maintained as mere real estate developments, they can hardly be considered simply a retail problem. Furthermore, because they occupy a vast area of the valued urban area of the city centre of Lisbon, they are at present an increasing urban planning problem.

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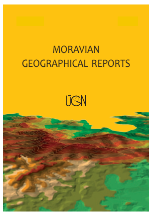

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The impact of consumer green behaviour on green loyalty among retail formats: A Romanian case study

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Abstract

Customer loyalty enables companies to outperform competitors and better satisfy customers' needs and desires. People today are increasingly interested in buying green or sustainable products, pursuing responsible consumption, getting involved in environmental protection activities and preserving resources. These key elements of sustainability are crucial in retailer strategies for approaching customers, strategies encompassing both communication and well-structured offers of sustainable, green and environmentally friendly products to gain customers' loyalty and assist them in adopting responsible (green) consumption behaviours. This may not be the case in all retail markets or sub-markets, however. This paper investigates these issues in the context of the emerging European economy of Romania, using a survey conducted in four major retail segments comprising more than 3,000 respondents. Using structural equation modelling the authors reveal that Romanian retailers are concerned with drawing customers and gaining their loyalty by adopting strategies based on the principles of sustainability. The results indicate that in this emerging market behavioural antecedents differ across the analysed retail formats in building green loyalty, which represents a challenge for retailers in their attempt to draw, satisfy and bind consumers to their retail formats and stores. At the same time, there is also a growing awareness of green aspects among Eastern Europeans, even if they have been challenged with sustainability issues and the need to adopt green behaviours more recently than their Western European counterparts.

Keywords: *green behaviours, responsible consumption, sustainable products, green loyalty, retail formats, Romania*

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1. Introduction

The preservation of resources and environmental protection are much debated issues in developed societies, being consistently adopted by most organisations in such societies within their market strategies, but in countries with emerging economies such issues are still in their infancy. The rapid development of communication technologies in these emerging markets allows consumers not only to have access to global information, but also to understand the behaviour of their peers in the mature markets and to develop similar demands and expectations. Consumers in emerging markets strive to adopt sustainable behaviours as they are increasingly concerned with environmental protection issues, the reduction of resource consumption, the production of goods from renewable sources, etc. (Dabija et al., 2018) and prefer more and more products made from green, organic components with a low environmental footprint and contribution to pollution reduction (Dabija and Bejan, 2017).

The proper understanding of consumption preferences and relevant behavioural dimensions to determine customer loyalty is, on the one hand, a major challenge for retailers operating in emerging markets – represented mostly by global players and regional retail chains – and on the other hand, a pressing need to adopt the most appropriate market strategies. Based on this premise, this paper investigates behavioural antecedents contributing to the development of green loyalty in the Romanian retail market, through a comparative analysis of these dimensions in four retail formats: food, do-it-yourself (DIY), electronic and household appliances, and fashion and footwear. In so doing, this paper addresses the topic of consumption patterns, shopping habits and the shopping behaviours of a given population and its consumer preferences.

This paper is structured as follows. Following a literature analysis of the antecedents fostering green loyalty in food and non-food retail, in which special emphasis is placed

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on green behaviour and its components, the proclivity for environment protection and on factors determining responsible consumption, the research methodology and operationalisation of hypotheses and methods of data collection are presented, with analysis of results and conclusions and contributions rounding out the paper.

2. Literature review

The rapid development of the retail sector and the rise in the number of competitors make the increase of customer trust and the attraction of customers to the stores more difficult (Fernie and Sparks, 2014). The main way for retail chains to address competition is mostly through offer differentiation, the proper satisfaction of consumers and the gaining of their loyalty. Loyalty is behaviour that can be observed and is reflected in consumers' attitudes and the way in which they advertise a company or a product through word-of-mouth recommendation (Garcia de los Salmones et al., 2005). Individuals may prove their loyalty to a company by repurchasing one of its products or services, by remaining immune to the marketing efforts of the other competitors (Sierra et al., 2015), as well as by recommending the company and increasing the frequency of visits and/or the purchased quantity of goods (Dabija and Băbuţ, 2012; Swoboda et al., 2014).

At present, there is movement by retailers and other firms towards becoming greener, more environmentally friendly and socially responsible. These concepts are often blurred as to their meaning and whether they all mean the same thing (Grant et al., 2017b). Thus, we adopt the definition of green retailing put forth by Lai et al. (2010) that stems from the natural resource-based view of the firm or NRBV (Hart, 1995). NRBV stresses a firm's relationship with the natural environment and highlights three strategic capabilities of the firm: pollution prevention, product stewardship and sustainable development. Green practices, involving these strategic capabilities, are valuable to firms in gaining sustainable cost and service advantages, and thus green retailing in this paper considers these practices in the context of the four 'green Ps' discussed in section 2.1 (Lai et al., 2010; Epuran et al., 2018).

The retailing literature deals more frequently with the role of green behaviour in the generation of customer loyalty towards the retail store (Kang and Hur, 2012; Asgarian et al., 2014; Dabija and Bejan, 2017). Therefore, loyalty represents a result of the interaction between green behaviour, the proclivity or propensity for environmental protection and responsible consumption.

2.1 Green behaviour

There is an increasing trend to exhibit green behaviour today. Being green is a process requiring major changes on the part of consumers, changes which are not only related to environment protection but also include the implementation of actions with a positive impact on an individual's health (Reshmi and Johnson, 2014). Consumers seem to be more willing to bring green products into their regular consumption, for example Fair Trade or organic food products and Forest Stewardship Council (FSC) wood products. Reshmi and Johnson (2014) define green products as those items with low negative impact on the environment, which do not affect people's health and are often made of recyclable, organic and green materials or contain biodegradable components. This opinion is also shared by authors who believe that green products should be produced through processes with a very low environmental footprint (e.g. Sarkis et al., 2010). Consumers who are more concerned with environmental protection tend to be more addicted to purchasing green products, which contributes to the creation of green behaviours (Kirmani and Khan 2016).

The extant research literature on this phenomenon is limited, particularly with respect to empirical studies. Furthermore, many authors simply consider green purchasing behaviour with respect to attitudes and product characteristics and do not consider satisfaction and loyalty. For example, Young et al. (2015) note that the key factors that will help green consumers purchase a more ethical technology product are:

1. the consumer's green values are strong;
2. the consumer has purchase experience;
3. the consumer has plenty of time for research and decision making;
4. s/he has good knowledge of the relevant environmental issues;
5. green products are reasonably available; and
6. the consumer can afford and is prepared for the financial costs.

Cherian and Jacob (2012) focused on green marketing and the need to shift a consumer's behaviour and attitude towards more environmentally friendly life styles. Their study was a compilation of various factors related to green marketing and presented a conceptual framework. Do Paço et al. (2016) examined the perceptions of 1,175 university students across England, Germany, Portugal and Spain to determine whether they will take environmental aspects into account when they buy something or in their daily behaviours. Their work was exploratory in nature, and they concluded that it is not yet possible to answer this question with a high degree of certainty, and thus the development of green consumer behavioural models is necessary.

From a conceptual perspective, Joshi and Rahman (2015) reviewed 53 empirical articles on green purchasing behaviour from 2000 to 2014: they found that a consumer's environmental concerns and the functional attributes of a product emerged as the two major determinants of consumer green purchasing behaviour. They suggested their work would help policy makers and managers in formulating and implementing strategies to encourage green purchasing. Lastly, Jaiswal and Kant (2018), building on Joshi and Rhaman (2015), conducted an empirical study to operationalise the relationship between cognitive factors directly and indirectly influencing green purchase intention via the mediating role of attitude towards green products, in an Indian context. They argued that their model also provides valuable inputs for policymakers and marketers to design green marketing policies and strategies.

The purchase of green products depends on an individual's attitude to the environment and its protection. Various studies have shown that there is a positive and quite strong relationship between customer satisfaction and her or his intention to purchase (Reshmi and Johnson, 2014). When the customer is content with the sustainability of a product, she or he will purchase that product and the satisfaction derived from purchasing and using it will pave the way for loyalty which, in turn, will be displayed by repurchasing such green products. The connection between green attitudes and green behaviour is dichotomous, which is best expressed in the 'all or nothing' approach adopted by some consumers (Johnstone and Tan, 2014). When making purchases consumers either follow the principle according to which all items should be environmentally friendly, or do not pay attention to issues like sustainability or concern for the environment.

An attitude towards and the desire to adopt a green behaviour also depends on how it is assessed and appreciated by the individual's friends and the society in which she or he lives. When green behaviour is assimilated into society as a social norm (i.e. universally accepted as a common practice), its impact on consumers is greater. Conversely, if green behaviour is not viewed as a common practice, consumers will not make changes to their life style to adopt this concept (Johnstone and Tan, 2014). From a marketer's viewpoint, an individual's increasing concern with the environment has contributed to the emergence of a new segment to be serviced – the so-called green consumers. These are consumers who make purchasing decisions based on the extent to which the product is made of green components or contributes to the protection of the environment. From a marketing perspective, green behaviour represents the concerted and synergetic interaction between the four 'green Ps', namely: green product/production, green pricing, green placement and green promotion (Kordshouli et al., 2015). When used synergistically, the four green Ps generate trust in green products, overall satisfaction and, in the end, green loyalty.

Green product/production is not only about making and/or developing a product from recyclable and environmentally friendly materials, but also about the extent to which the consumption of such a product contributes to pollution reduction or has a low level of pollution impact. It also includes sourcing and procurement of products in a green manner, which entails internal drivers including the desire to reduce costs by a reduction of waste, pollution, brand damage or litigation, and external drivers of social compliance and regulation. Furthermore, labels and certifications simplify green procurement as they set standards but introduce auditing and monitoring burdens on the buying side (Grant et al., 2017). The latter was confirmed by Chkanikova (2016), who investigated Swedish, British and Danish supermarkets to determine what type of purchasing relationships are more favourable for greening product supply. She found such relationships are dependent on characteristics of the procurement context, i.e. the presence of well-established certification schemes and the purchaser's interpretation of the power state dependence with suppliers. Thus it is important that marketers educate consumers, so they may develop a mentality that allows them to become aware of the benefits of the goods about to be purchased – and their provenance. By providing the target segment with precise information, their behaviour can be shaped as people have become more careful about the details that green products have on the package and/or in the product description, such as ingredients, components, manufacturing processes, standards, certification, etc. (Kordshouli et al., 2015).

Green price is frequently associated with an individual's willingness to pay a premium price for green or organic products. As price plays a decisive role in a consumer's decision-making processes and influences their satisfaction, it is obvious that the benefits and advantages to be gained by consumers must surpass the financial amount paid for the product (Herrmann et al., 2007). If the advantages of an item derived from its consumption, usage or possession exceed a consumer's expectations, he or she will be willing to pay a premium price, repurchase, retry and/or recommend the product in the future and thus exhibit loyalty to the green product. Otherwise, the chances of generating loyalty will diminish considerably as will the possibility of repeating future purchases (Pop and Dabija, 2013).

Green placement is heavily dependent on and exerts growing pressure on green supply chains. This is due primarily to the fact that a significant number of environmental challenges and problems are generated by processes of logistics conducted by organisations, such as manufacturing or sourcing (Eltayeb et al., 2011; Grant et al., 2017b). Therefore, companies with a negative public image or accused of conducting business in violation of environmental regulations, tend to be confronted with a drop in the number of customers, which naturally has an unfavourable impact on green satisfaction.

Green promotion focuses on various promotional norms adopted by companies and brought to the attention of consumers through packaging, promotional spots/advertisements and other initiatives to achieve differentiation from competitors (Kordshouli et al., 2015; Vatamanescu et al., 2017). This provides evidence to consumers that companies care about the environment and at the same time are trying to empathize with the concerns of their consumers.

2.2 Proclivity for environmental protection

The proclivity for environmental protection is closely correlated with an individual's behavioural intentions (Konuk et al., 2015), which depend on the existence of green purchase intentions, a desire to pay more for green products (Pop and Dabija, 2013) and a desire to promote or present them in a good light to other people (e.g. word-of-mouth) (Zeithaml et al., 1996). When these three conditions are met and put into practice, i.e. by activating a conative behaviour component of attitudes, consumers exhibit a favourable predisposition towards protecting the environment. Consumers' attitudes to environmental and sustainability issues depend greatly on their experience and the resources they possess, i.e. their concern for such issues is based on the gap between the limited resources they possess and their own desires (Choshaly, 2017). As they are faced with various life situations and contexts and the traditional and green product purchase and consumption experience is improved, consumers are more and more aware of the need to protect the environment, the environmental issues affecting goods and companies, and negative impacts on the environment when there is a failure to adopt environmentally friendly processes and implement precise quality standards. The concern for environment protection generates a proactive attitude among individuals expressed in an increasingly frequent preference for environmentally friendly products and the fostering of future green purchasing intentions (Choshaly, 2017).

Even if environmental protection issues have increasingly become part of daily social life in general, and of green-oriented consumers, in particular, the putting into practice of green attitudes does not always lead to environmental protection-oriented behaviours. Culiberg and Elgaaied-Gambier (2016) believe that the existence of environmental protection-oriented behaviour depends on situational and social factors: any individual's behaviour varies according to her or his available resources. A person sometimes pays more (i.e. a premium price) for green products if she/he wishes to have them or if she/he has the financial means. The adoption of such behaviour also depends on influences exerted by the person's reference group and on the attitudes of peers towards environmental protection.

These actions are also important at the global level. For example, China is regarded as the country with the gravest pollution problems because of high gaseous emission levels. Specialists believe that this is the price paid by the country with the most impressive economic growth (Guo et al., 2013). The appearance of green products has greatly benefitted the Chinese people, representing a chance for improving their life. In fact, the Chinese view the purchase of green products as a means of improving the quality of life and of increasing the care for nature and the environment by reducing pollution. This laid the foundation for further economic development without lessening the chances of future generations having access to similar resources. Legislation was changed as well, with the result that the policies of the Chinese government focused on environment governance (Pu and Fu, 2018). The success of these Chinese policies is mirrored in the shift "from a centrally-planned economy to a market-oriented economy" (Li et al., 2018, p. 582). In the past, the Chinese economy focused on agriculture and its benefits, but now China is mostly an urban society, with its population concentrated in the large cities (Li et al., 2018). The shift from rural to urban environments led not only to greater pollution but also to a change in consumption behaviours. As they live in larger cities, people buy large-scale products a lot more frequently than when consumption depended on autarchy.

Almost three-quarters of Europeans live in urban areas, with the result that excessive pollution sometimes has negative effects on the environment. Unlike China, the European Union acts a lot more swiftly to fight pollution and reduce gas emissions (Meijering et al., 2018). Local authorities are motivated to implement sustainable measures for example as, starting in 2008, the competition for the "European Green Capital Award" has been organised, in which European cities are assessed by how they live up to and apply environmental standards and other sustainable measures (Vasiliu et al., 2016; Meijering et al., 2018).

2.3 Responsible consumption

Responsible consumption is based on the premise that individuals make rational choices and thought-through decisions, i.e. they analyse purchases to diminish the likelihood that impulse purchases could have a negative impact on the environment (Schaefer and Crane, 2005). Responsible consumption centres around a consumer's fear about negative impacts on the environment and their own health and well-being, in addition to general societal effects. Responsible consumption is reflected in the activities of companies and people alike. Companies generate responsible consumption by obeying ethical norms and environmental protection legislation and by initiating social responsibility campaigns (Giesler and Veresiu, 2014). Such campaigns inform consumers to make them aware of negative effects from their decisions, as well as contribute to an increase in loyalty towards the company concerned.

Responsible consumption is a deliberate effort made by consumers based on values and beliefs acquired and adhered to over time (Ertz, 2016). The first step in exhibiting responsible consumption is a desire to recycle products – to make a minimal contribution to the preservation of resources. Consumers understand the consequences of a product's resulting waste after it has fulfilled the major purpose for which it was created and purchased (A-Jalil et al., 2016). They also may deem it appropriate to find another use for the product or to use it to design a new product. Therefore, responsible consumption may be adopted hedonistically but it may also depend on the usefulness of the purchased product. While hedonism may encompass elements such as satisfaction or the pleasure generated by the act of purchasing itself, the utility components include the rationality of the purchasing decision or the functionality of the product (Adomaviciute, 2013). It is often the case that the latter category is the reason behind the amount paid for green products. This influences the consumer's purchasing decision, especially since the price of green products is higher and the consumers' behaviour is marked by the desire to pay more for such products.

The two-way approach according to which the welfare of a company turns on the welfare of consumers, is one of the theories behind the concept of 'responsible consumption' (Romani et al, 2014). On the other hand, consumers opt for responsible consumption early in the decision-making process and eliminate product alternatives that might have a negative impact on the environment and their health. Furthermore, the tendency to adopt such behaviour is a lot more pronounced among individuals when responsible consumption is a frequent habit of the members of their reference group.

Likewise, responsible consumption becomes binding upon people when viewed as a social norm, thus speeding up its acceptance by individuals. The actions to promote responsible consumption among consumers are conducted not only by non-governmental organisations, highly esteemed for their transparent and objective involvement (Romani et al., 2014), but also by companies and retailers that adopt and promote sustainability strategies and those concerned with the environment. Responsible consumption includes two major components: ethical consumption and environmental consumption (Adomaviciute, 2013). In turn, these components contain the implications of consumers' decisions – and those effects the actions of companies might generate when they fail to comply with legislative or ethical regulations.

Individuals display a tendency to adopt responsible consumption when the decision-making process and the purchase itself are viewed as a buying experience (Shobeiri et al., 2013). If the affective component of attitudes has a major role in choosing products, customers will think more about the possible problems that such goods may cause to the environment, as well as the impact of their purchasing decision on the preservation of resources, pollution reduction and the protection of the environment (Dabija et al., 2017).

2.4 Green loyalty

Green loyalty (Chen, 2010) measures a consumer's level of repurchasing intentions, accounting for a company's attitude to the environment and its commitment to promote sustainability. Two specific situations may appear, however. The first starts from the premise that consumers are only loyal to a company because they have no alternative (Kordshouli et al., 2015). In this case, loyalty is achieved under coercive conditions as the retailer is not the consumer's first choice. The second starts from the idea that consumer loyalty is the result of perceived satisfaction (Kordshouli et al., 2015). In this case, consumers prefer the products of the company regardless of how many competitors are in the market. This is a further incentive for companies to diversify their range of products to include green products and to develop new items in compliance with environment protection norms (Katait, 2014).

2.5 Summary and resulting hypotheses

In summary, the development of green behaviours is based on the attention paid by companies to the environment and consumers (Thapa and Verma, 2014). This aspect is often considered by the management of companies as they are aware that protection of the environment is of paramount importance to a great number of consumers. Consequently, the companies' increasing concern for nature helps them increase their '4Ps' propositions to meet consumers' needs and achieve competitiveness in the current marketplace with the ultimate ambition of achieving ongoing consumer loyalty. The discussions in the preceding sections (2.1–2.4) are the bases for the development of the following three hypotheses:

- H1: Green behaviour positively affects a consumer's loyalty towards green-oriented retail formats;
- H2: A proclivity for environmental protection positively affects a consumer's loyalty towards green-oriented retail formats; and
- H3: Responsible consumption positively affects a consumer's loyalty towards green-oriented retail formats.

3. Research methodology, demographic data and analytical methods

3.1 Survey design

As this topic is relatively under-researched, we adopted an 'objectivist problematic' ontological and epistemological methodology after Cunliffe (2011). In this approach, reality is seen to exist independently as an entity or phenomenon. Such phenomena or objects can be studied to build generalised knowledge about systems, mechanisms, processes, patterns of behaviour, etc. Such knowledge can consequently be replicated and applied back to the world to improve it (i.e. a single hermeneutic). This methodology takes a macro perspective of studying consumers at a strategic and societal/environmental level and drawing generalisations about group and individual behaviours.

The method used was a survey-based quantitative exploratory study, using face-to-face questionnaire administration starting from the objective of the research, that is, highlighting the extent to which Romanian consumers, regardless of their age, develop 'green' loyalty towards four retail formats: food (i.e. grocery); electronic-household appliances/accessories and information technology (i.e. computers and mobile phones); do-it-yourself (DIY), furniture; and interior design and apparel, footwear and sportswear, and based on the synergy of their green behaviours derived from their previous experiences with such products, the proclivity for environment protection and responsible consumption of goods. The research is based on the investigation of the relationships evident from the three hypotheses presented in section 2.5 above.

Approximately 3,400 questionnaires were administered in three development regions of Romania (Crişana, Centru and Banat), out of a total of eight regions, belonging to the historical region of Transylvania (with capital cities in Cluj-Napoca, Braşov and Timişoara), thus ensuring geographical representativeness of the sample (see Fig. 1). The interviewers were instructed in advance to approach respondents according to their gender and age (Churchill, 1991), to ensure representativeness according to the records in the Statistical Yearbook (2014). The face-to-face interviews were held in various public places, in the proximity to stores, or at respondents' homes. Respondents expressed their level of agreement with the predetermined statements on a five-point Likert scale.

Among the stores frequently visited by respondents and from which they make their purchases, are those belonging to international and domestic food and non-food retail chains. The classification of these stores is presented in Table 1. It is interesting that respondents pointed to some stores carrying mostly food products, such as hypermarkets, as their favourite stores for the purchase of consumer electronics and household products. This indicates that these retailers implement a strategy of assortment reorientation and expansion to attract as many consumers as possible.

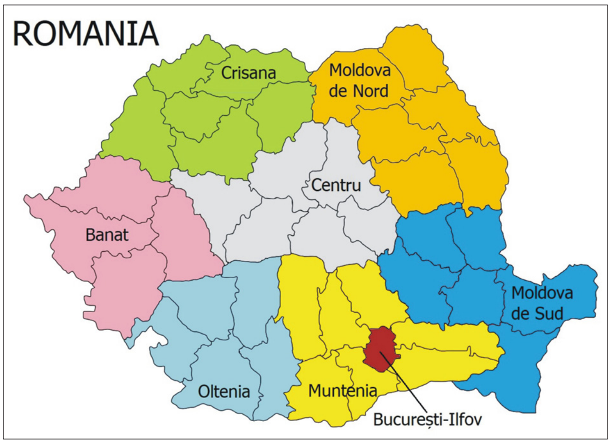

Fig. 1: Development regions and counties in Romania
Source: authors' elaboration

Retail format	Romanian retail stores	International retail stores
Fashion, sportswear and footwear	Bigotti, Guara, Effect, Eponje, IQ, DH Sport, Fashionsport, Benvenutti, Ameli, Marelbo, Clujana	Zara, Bershka, Stradivarius, New Yorker, C&A, H&M, Calvin Klein, Hugo Boss, Lee Cooper, Decathlon, Intersport, Hervis, Adidas, Nike, Humanic, Ecco, Deichmann
DIY	Ambient, Casa Rusu, Dedeman, Denver, Elvila, King Art, Lems, Mobexpert, Nobila Casa	Leroy Merlin, Bricostore, Hornbach, Ikea, Jysk, Metro, Praktiker
Electronics products	Altex, cel.ro, Domo, Emag, Flanco, Media Galaxy, PC Garage, Satan	Auchan, Kaufland, Metro, Selgros
Food	Various Neighbourhood Stores	Auchan, Billa, Carrefour, Cora, Kaufland, Lidl, Penny, Profi

Tab. 1: Romanian and international retail stores chains
Source: authors' elaboration based on survey data

3.2 Operationalisation of variables

When developing the questionnaire, the authors changed the theoretical latent constructs into manifest variables or meaningful statements for each construct considered. Green behaviour was measured based on four items: the impact of people's purchases on the environment, the extent to which their decisions are determined by care for the preservation of the environment, the extent to which they view themselves as responsible persons, and concern for the waste of natural resources (Lastovicka et al., 1999). Proclivity for environmental protection was measured against respondents' concern for complying with environmental protection regulations, the negative impact of the analysed retail business on the environment, and against respondents' desire to find out more information about the extent to which the purchased articles have a reduced environmental footprint (Antil and Bennett, 1979; Antil, 1984; Dabija et al., 2016). Responsible consumption was measured based on statements related to food and non-food product recycling behaviour, the repeated use of articles/products, and the need to use them in a more responsible way (Lastovicka et al., 1999; Haws et al., 2014). Romanians' loyalty to green retail formats was measured by respondents' intention and desire to revisit and recommend such stores, the proclivity for the purchase of green, organic products obtained from components that do not harm the environment, as well as the motivation to even travel a longer distance to buy such products (Nasir and Karakaya, 2014). The model subject to evaluation is presented as Figure 2.

3.3 Testing the data for accuracy, reliability and internal consistency

The data were systematically compiled, statistically tested and analysed with econometric software. Cronbach's α (> 0.7), item-to-total correlations, KMO criterion (> 0.7), Bartlett's test of sphericity and structural equation modelling (Churchill, 1991), were used to check the validity, reliability and internal consistency of data and test the relationships in the three hypotheses. Thus, the smallest value for Cronbach's α was obtained in the case of responsible consumption (0.789) consisting of three items, while the greatest value was recorded for loyalty towards green-oriented retail formats (0.90) consisting of five items. The other two constructs, green behaviour, consisting of four items, and proclivity for environment protection, generated Cronbach's α-values of 0.88 and 0.84, respectively. Exploratory factor analysis revealed increased stability for each of the four constructs with the KMO criterion varying between 0.74 and 0.87 and the variance explained percentage ranging between 52.0% and 71.3%.

We then subjected the items of the three investigated constructs (responsible consumption, green behaviour and proclivity for environment protection) to a single exploratory factor analysis (Walsh and Beatty, 2007). Based on the fit indices (KMO = 0.92, KMO > 0.7, $\chi2$ = 19,801.82; $p < 0.001$; df = 91) that exceeded minimum threshold levels, the results confirmed the possibility to extract precisely three factors derived from the items of each analysed construct (Churchill, 1991; Forza and Filippini, 1998; Ju et al., 2006). The first factor with the largest eigenvalue (5.66) and 40.4% variance explained is green behaviour, which has the greatest contribution to the variance reduction of the investigated phenomenon. It is followed by proclivity for environmental protection, having a smaller contribution to the explanation of the investigated phenomenon (eigenvalue = 1.69; variance explained 12.0%), and by responsible consumption (eigenvalue = 1.267, variance explained 9.03%). The next step was to determine, using the structural equation modelling software from SPSS (AMOS), the correlation between dependent and independent variables of the model (Fig. 2) for the four analysed retail formats (multi-group). The fit indices exceed the minimum acceptable thresholds specified in the literature (> 0.8; ≤ 0.08) (Forza and Filippini, 1998; Ju et al., 2006), thus allowing the validation of the model and the interpretation of results.

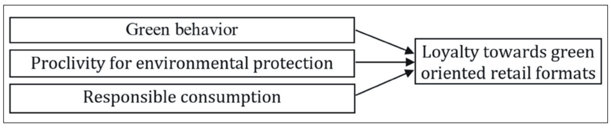

Fig. 2: The investigated model
Source: authors' conceptualisation

3.4 Sample structure

The breakdown of respondents by the four retail formats was relatively evenly balanced (about 23%), with a slight deviation being recorded in the case of fashion, sportswear and footwear retail (31%). This is likely due to the random collection of data, as respondents were asked to name up to four favourite stores where they regularly go shopping. Each interviewer was instructed to make sure that at every fourth interview, an answer was provided for the first, the second, the third and the fourth store mentioned by a respondent. A greater number of opinions about fashion retail were obtained from women, likely due to their experience with fashion retailers and stores. In a similar study, Brough et al. (2016) confirmed that women have an eco-friendly attitude by getting involved in environment protection actions and choosing retailers for making purchases according to this attitude.

It is also interesting that a relatively large number of responses concerning electronics, household, information technology and accessories, furniture, DIY and interior design retail items were received from women. The latest societal consumption trends indicate that women are starting to express interest in, and want to know more details about such products, and they are visiting these stores likely as a response to retailers' strategies focused on enhancing hedonistic shopping orientations among female consumers (Otnes and McGrath, 2001; Teo and Sidin, 2014). Until recently, men showed a greater interest in issues related to the environment and environmental protection, but now more and more women show concern for these issues (Sima, 2014), helping to account for the results obtained in this research. Most respondents (84.7%) in this survey are urban dwellers, and a relatively small number of responses was obtained from consumers living in rural areas (n = 517, 15.3%). Most questionnaires were validated for the food retail responses, which concurs with the distribution of retail chains in Romania (found predominantly in urban areas and less in rural areas). The rural areas are almost exclusively targetted by food retailers that open small supermarkets or discount stores in villages with good custom (Dabija and Abrudan, 2015).

Almost one-third of the respondents live in three-person households (1,057 persons, 31.3%) and prefer stores belonging to all retail formats. A significant number of responses was also obtained from persons living in one-person households (4.7%), who purchased mostly food and textile (clothes, footwear) products. Most individuals who assessed food retail stores have graduated from high school (12.9%), while most respondents who assessed the other three retail formats have pursued higher education: 9.8% respondents for DIY and furniture retail, 10.9% for electronic and household products retail; and 14.1% for fashion, sportswear and footwear retail. As the level of education increases, individuals acquire better training, boost their revenues and visit and prefer other stores beside the food stores. Aschemann-Witzel and Zielke (2017) highlight the fact that socio-demographic characteristics of individuals are more and more frequently the major element behind consumers' attitudes for the purchase of organic food.

When asked about their monthly net income earmarked for shopping, 625 persons (18.5% of the sample) refused to provide any information. Most individuals in the sample earn a monthly net income between the national minimum wage (205 EUR) and the average wage (460 EUR), calculated at the time of the research. They make purchases from food (10.2%), textile (12.6%), electronic and household appliances (10%) and DIY and furniture (9.1%) stores. The persons with an income below the national minimum wage (205 EUR) accessed particularly the food stores (4.6%), while those with an income over 2×-average wages accessed especially the fashion and footwear (1.9%), DIY and furniture (1.4%) and electronic and household appliances (1%) stores.

Only 21 participants in this research study stated that they bought food only several times a year (0.6%). Most respondents analysed for this retail format (738 persons – 21.8% of the sample) visit super- and hypermarkets, proximity and discount stores on a weekly basis. The other retail formats are visited several times a year at the very most, whether they are DIY and furniture (307 persons), electronic and household appliances (403 persons), or fashion and footwear (481 persons) stores. A significant number of respondents stated they visited textile stores every week (217 persons), likely to keep abreast of the latest collections and to always find new fashion articles. This behaviour also confirms previous research (Dabija et al., 2014).

Despite the seemingly greater purchasing frequency in fashion stores, the amounts of money spent there are moderate, with 539 respondents spending below 20% of their income in DIY and furniture stores. This is comparable to the number of people making purchases from electronic and household appliances stores (512 persons) and fashion stores (568 persons). Respondents spend greater amounts of money on food products. Thus, 271 persons stated that the money spent in proximity stores, super- and hypermarkets amounted to 60% of their entire budget. Only 117 respondents spend between 41% and 60% of their budget in fashion, sportswear and footwear stores. This is reasonable because food represents the basic source for ensuring daily subsistence and, as such, people seek first to ensure their basic needs and then buy other non-food products (Swoboda et al., 2014; Dabija and Abrudan, 2015). In his research, Sima (2014) demonstrates that 26% of individuals are willing to pay up to 10% more to get the benefits of green products.

4. Results and discussion

The fit indices for the three hypotheses have values higher than the minimum acceptable thresholds (> 0.8; ≤ 0.08), which allows for the validation of the model (Tab. 2) and the interpretation of results (Forza and Filippini, 1998; Ju et al., 2006).

Respondents' green loyalty to the four retail formats analysed is enhanced by the investigated behavioural dimensions. Consumers' proclivity for environmental protection has the strongest significant contribution in creating loyalty at the level of the four retail formats as a whole: 0.71 ($p < 0.001$) in food, 0.60 ($p < 0.001$) in DIY, furniture and interior design, 0.51 ($p < 0.001$) in fashion, footwear and sportswear and 0.47 ($p < 0.001$) in electronic and household appliances, information technology and accessories. This indicates that consumers are increasingly aware of the need to preserve resources and adopt green behaviour. The existence of responsible consumption at the level of all four retail formats, that is, the tendency to

Sector (sample) / Effects	Correlation	Model fit	
Food (n = 807)		χ2	2,295.471
Responsible consumption → Green Loyalty	0.188**	df	629
Green behaviour → Green Loyalty	0.179***	χ2 / df	3.808
Proclivity for environment protection → Green Loyalty	0.707****	GFI	0.926
Fashion (n = 1,068)		AGFI	0.911
Responsible consumption → Green Loyalty	0.134***	NFI	0.925
Green behaviour → Green Loyalty	0.314****	CFI	0.944
Proclivity for environment protection → Green Loyalty	0.508***	TLI	0.939
DIY (n = 744)		*p < 0.1	
Responsible consumption → Green Loyalty	0.136*	**p < 0.05	
Green behaviour → Green Loyalty	0.176***	***p < 0.01	
Proclivity for environment protection → Green Loyalty	0.595****	****p < 0.001	
Electronics (n = 763)		RMSEA (≤ 0.08)	
Responsible consumption → Green Loyalty	0.234****	0.0290	
Green behaviour → Green Loyalty	0.236****	SRMR (≤ 0.08)	
Proclivity for environment protection → Green Loyalty	0.466****	0.0507	

Tab. 2: Green orientation and customer loyalty in food/non-food retail formats
Source: authors' calculations

recycle or lengthen the use of a fashion article or household appliance or the consumption of food shortly before expiry date, also contributes to the creation of loyalty to these retail stores but in a different way. The lowest impact is recorded in the case of fashion (0.13; ($p < 0.01$) and DIY, furniture and interior design retail (0.14; $p < 0.1$), while the intensity of the connection is greater in the case of food retail (0.19; $p < 0.05$) and a lot stronger in the case of electronic and household appliances retail (0.23; $p < 0.001$). This varying impact probably depends on the type of goods analysed as the importance of these goods varies from one consumer to another.

Individuals' previous experience with, and favourable attitude towards sustainable and environmentally friendly products, that is, their green behaviour, varies greatly across the retail formats in creating green loyalty. The strongest impact is noticed in the case of fashion, footwear and sportswear retail (0.31; $p < 0.001$) and the weakest impact, contrary to our expectations, was recorded in the case of food (0.18; $p < 0.01$) and DIY-furniture (0.18; $p < 0.01$) retail. In the case of electronic and household appliances retail, the impact is average in intensity but highly significant (0.24; $p < 0.001$). The results seem to indicate that prior green experiences of respondents with fashion products is more important than the experience with food products in developing loyalty. A possible explanation could be that fashion items play a greater role in bringing social prestige as individuals can be seen wearing them, whereas the consumption of organic food is merely a matter of personal interest pursued only by those who can afford to pay a premium price.

4.1 Food retail

Several retail formats were selected for the category of food retail to be assessed by respondents: hypermarkets (Auchan, Cora, Carrefour), cash & carry stores (Metro and Selgros), one ´category killer´ (Kaufland), supermarkets (Profi, Billa, Carrefour market, etc.), proximity stores (Profi City, ABC stores, etc.). Their categorisation was made according to guidelines in the literature (Swoboda et al., 2014; Dabija and Abrudan, 2015). Consumers' green loyalty to the food retail formats is primarily determined by their tendency to share in environmental protection through the food they purchase (0.71; $p < 0.001$). This intense and highly significant impact may be due to consumers' increased sensitivity to the food they consume (which has to be natural) and its source. A further argument is that consumers worry about their health. They want food that contributes positively to their health and general welfare (Pop and Dabija, 2013) and consequently seek to adopt and use green products to a greater and greater extent. Retailers providing society with a healthier life environment and consumers with the opportunity to maintain their health through the purchased goods, will secure a good position in the mind of individuals and differentiate themselves properly from their competitors (Kordshouli et al., 2015).

Food retailers have discovered that the choices made by consumers preferring green products can be shaped through information provided, as communication is a useful means of persuasion. In addition to the source of articles, the quality standards and certifications applied onto packages and labels, producers write more and more frequently about nutritional information designed to encourage the choice of healthier food (Mørk et al., 2017). The choice of organic foods is highly dependent on price as it can serve either as the main obstacle to the adoption of sustainable behaviour and the consumption of organics, or the main reason for choosing them given the benefits they have for health and their contribution to the environment.

Behaviour centred on the preference for sustainable (Dabija and Bejan, 2017) and/or environmentally friendly products can only serve as a prerequisite for the development of loyalty to the retailers offering organic products. Previous studies have shown that Romanians make efforts to consume more organic food, being more and more careful with what they purchase and consume, and expressing increased trust in the offer of health food stores carrying organic products or products obtained from sustainable trade. Having noticed this trend, many retailers have extended their assortment of organic food over the last few years (Pop and Dabija, 2013). Caring for one's health and welfare is seen as essential in making the decision to buy food, so that many consumers opt for green groceries (Sima, 2014).

Given the nature of food and its role in maintaining people's health, it is only natural that the selection of retailers and the adoption of loyal behaviour should be made by taking into account responsible consumption as well (0.19; $p < 0.05$), whether it is about product recycling, the lengthening of product usage or making financial savings by optimising the products possessed or by postponing the purchase and/or consumption of a product (Dabija and Bejan, 2017). A significant and somewhat intensive influence on the creation of loyalty to the retail formats marketing green products is exerted by consumer green behaviour (0.18; $p < 0.01$). An organic, green product-oriented mentality, a high level of education fostering a positive attitude to green products and the acceptance of a premium price for organic products, as well as a consumer's previous experiences with such products, will lead to more rapid generation of loyalty among consumers. Women seem to purchase and consume organic food more than men (Ghosh et al., 2016), likely due to longer shopping periods and their planning, and to their concerns for maintaining their health and that of the entire family.

4.2 Fashion, footwear and sportswear retail

Respondents find it important that fashion articles be made of environmentally friendly components that do not pollute and do not foster the waste of resources. This condition must be met to develop their green loyalty (0.51; $p < 0.01$). The second dimension in terms of impact and significance is the existence of green behaviour (0.31; $p < 0.001$), that is, individuals' previous experiences and attitudes to environment protection and the preservation of resources. Consumers strive to contribute to the reduction of the impact of human activity on nature, and thus protect it by everything they do (their actions, decisions, etc.). As they exhibit such attitudes and orientation, it is easier to gain their loyalty and encourage them to return, revisit and purchase from retailers that manage to meet their objectives by the strategies they adopt. The results also reveal that the impact with the lowest intensity but sufficiently significant can be seen in the case of responsible consumption of fashion articles (0.13; $p < 0.01$). As clothes enhance individuals' social status and prestige, they are less enthusiastic about using such articles for a longer period and recycling them. This appears to be a perspective on responsible consumption that is rather about purchasing products made of natural fibres or organic leather than wearing clothes for a longer period.

Despite the increase of consumers' orientation towards green products, which helped this sector experience a great boom, Morgan and Birtwistle (2009) believe that this phenomenon is itself a contradiction. On the one hand, fashion retail promotes the frequent consumption and appearance of new models and trends and, on the other hand, the green component is associated with durability, sustainability, reuse or recycling (Dabija et al., 2016). The adoption of this concept in the fashion industry is mostly due to interpersonal influence (Sadachar et al., 2016), that is, consumers belong to different reference groups and their values and norms are subservient to the values and norms promoted by the other members of the group. Therefore, the interaction between people and groups has the potential to shape an individual's behaviour and enhance her or his desire to obey the rules of the group to which she or he aspires to belong.

4.3 DIY, furniture and interior design retail

The strongest impact in building consumers' green loyalty to DIY, furniture and interior design retails was found to be in the degree of consumers' orientations towards environmental protection, expressed in their concern with the observance of ethical norms in this sector, the actual protection of the environment and the reduction of the impact of industry and trade with such products on the environment (0.60; $p < 0.001$). Respondents always seem willing to have a minimum contribution to the achievement of this objective. On the other hand, the existence of behavioural prerequisites, opinions, knowledge and attitudes about the extent to which the individual may contribute to environmental protection also contributes to the creation of loyalty to the stores that adopt green strategies (0.18; $p < 0.01$). The lowest impact in intensity and significance can be noticed in the case of responsible consumption (0.14; $p < 0.1$), that is, individuals' willingness to recycle, reuse or extend the lifetime of the purchased goods. This may be the result of the fact that people rarely purchase such products and at the same time they (the products) are expected to exhibit longer durability than food or fashion products.

4.4 Electronic, household appliances, IT and accessories retail

For the electronics stores, all the investigated dimensions were found to have a strong and highly significant role in generating consumer green loyalty. While responsible consumption (0.23; $p < 0.001$) and consumers' green behaviour (0.24; $p < 0.001$) have a relatively similar, albeit strong, impact, respondents' proclivity for environment protection is twice as strong (0.47; $p < 0.001$). The electronic devices, the household appliances, computers and the other IT accessories pose a relatively high potential for pollution if discarded and not recycled or properly collected.

It is likely that the various buy-back programs implemented by the analysed retailers in conjunction with sustainability and social responsibility strategies, encourage respondents to believe that the companies' efforts to gain their loyalty and have them adopt green behaviour and support responsible consumption are quite normal. This aspect, coupled with the fact that the recycling and green product consumption-oriented mentality is deeply embedded in the minds of respondents, contributes to the protection of the environment, and stimulates future preferences and search for the stores that implement sustainable practices. In fact, many stores belonging to this retail format collect used batteries and products for clean disposal, reducing the impact of the retailer's products on the environment (Dabija and Bejan, 2017).

4.5 Verification of hypotheses

From the preceding discussion, these results inform the hypotheses developed in Section 2.5. The first hypothesis (H1: Green behaviour positively affects a consumer's loyalty towards green-oriented retail formats): Green behaviour does indeed affect green loyalty, regardless of the retail format, but the influence is not very strong across all the considered retail formats. Fashion and electronics retail formats are affected more than food and DIY retail in this respect. Hypothesis 2 (H2: A proclivity for environmental protection positively affects a consumer's loyalty towards green-oriented retail formats) may be fully supported for all four retail formats, consistently with the highest effects. In food retail this effect is unusually high, probably because consumers are very much concerned about security and the long-term effects of foodstuffs on their health. Hypothesis 3 (H3: Responsible consumption positively affects a consumer's loyalty towards green-oriented retail formats) is also partially supported, the influence being higher in electronics retail than in the other three retail formats.

5. Conclusions

Respondents are concerned about the impacts of food and non-food trade and industry on the environment, and carefully watch the actual actions and measures adopted by retailers to diminish their own organic footprint and particulates, and regenerate the natural areas affected by production and transportation processes (Dabija et al., 2017). Responsible consumers are worried by the potential impact of their purchasing actions on the environment. By adopting responsible consumption, they strive to contribute to environment protection, being concerned not only with their own health and the purchase of goods that improve their welfare, but also with how the consumption of various goods ensures the access of future generations to living conditions like those of the present.

The results from this project reveal that, from the customer's perspectives, the generation of green loyalty varies across the studied retail formats. Therefore, behavioural antecedents have the strongest and most significant impact in generating this type of loyalty in electronic and household appliances retail. Most likely this is because Romanian consumers are a lot more aware of the potential negative impact of these goods on the environment, when such goods are not carefully collected or are not recycled. Consequently, they are more careful in the selection of retailers implementing an environmental protection-oriented sustainability strategy. In the case of fashion and footwear retail, however, the green loyalty of customers in this emerging market is affected more by their own green behaviours, which is a sign that Romanian consumers have started to realise the potential negative impact of the increased consumption of these articles on the environment. At the same time, it is possible that Romanians display green loyalty towards retailers that offer goods made of green and organic fibres or goods known to have been obtained by fair trade processes, without the exploitation of the working class in the countries of production.

Satisfying and especially having consumers "cling" to the analysed retail formats seems to be a slightly more difficult task in the case of food and DIY retail. In these two retail formats, however, consumers' proclivity for environmental protection also plays an essential role in building green loyalty. This indicates that Romanian consumers are not insensitive to the products that are environmentally friendly – from what they eat and the extent to which such products are 'natural', to the goods/materials they use to build or decorate their houses.

It is important to note that, for the four retail formats analysed here, in general Romanians are increasingly aware of the need to adopt sustainable, green, nature-friendly behaviours which contribute, through the selection of specific products, to the preservation of resources and the environment. In other words, as retailers from mature markets have an increased presence in Romania, the green mindset of consumers in this market has become stronger (Pop and Dabija, 2013). They search for and buy more and more frequently not only the cheapest food and non-food products but also the green, environmentally-friendly products made according to standards having consideration for environment protection. Therefore, Romanian consumers are starting to increasingly resemble their Western European peers, despite their still limited access to infrastructure, the range of goods on offer and the opportunities to make on-line purchases (Dabija and Grant, 2016; Grant et al., 2017a).

The theoretical contribution of this research is in highlighting the combined effects of responsible consumption, green behaviour and proclivity for environmental protection on green loyalty in retail, as well as the comparative analysis of these factors in four retail formats in an emerging market. Previous studies have also discussed various aspects of the development of a strong retail store brand (Swoboda et al., 2014) or the transfer of retail formats to emerging markets (Swoboda et al., 2017), but they did not take into consideration the green aspects.

We have also empirically demonstrated that there are some significant differences in generating consumers' green loyalty for the four retail formats. Our findings might help retailers operating in various retail formats in emerging markets better understand consumer actions, as well as the factors that might lead to green loyalty. Based on these findings, retailers could develop better market development strategies to attract more green-oriented consumers of various ages and educational levels, potentially increasing their success and market shares.

Among research limitations in this project are the relatively unequal number of respondents from the analysed retail formats, as well as the lack of comparative analyses, for example, with international versus domestic retail chains, or for the retailers implementing sustainability strategies versus those that do not. Future research directions may also consider the analysis of the sample according to its socio-demographic characteristics, or the analysis of other retail-specific elements (product assortment, ambience, personnel, etc.) in building green loyalty.

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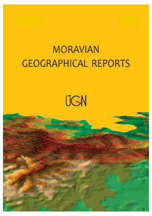

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"Tell me where you shop, and I will tell you who you are": Czech shopper profiles according to traditional, large-scale and alternative retail options

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Abstract

Traditional, 'post-traditional' large-scale, and 'alternative' food shopping options are used in this paper to address the following questions: Who are the customers of these different retail formats? Is it possible to discern certain types of shopper according to retail formats? Do alternative food networks attract significantly different consumers than traditional forms and large-scale outlets? Relatively unique data collected in an omnibus survey by The Centre for Independent Public Opinion Research during 2014, 2015 and 2017 (n = 3,168) are used in this analysis. The consumption habits and preferences of a representative sample of the Czech population were subject to investigation. Results are presented mainly by descriptive statistics and the testing of hypotheses on the similarity or difference of given shopper populations by contingency analysis (associations between characteristics use contingency coefficients). A profile of shoppers according to food provisioning options is presented, and demographic, socio-economic and geographic factors influencing current trends in the shopping behaviours of Czech consumers are analysed. Significant differences between the customers of diverse retail formats and alternative possibilities to acquire food are among the most important distinguishing factors characterising Czech shoppers today.

Keywords: *retail formats, alternative food networks, shopper profiles, Czech Republic*

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1. Introduction

Shopping habits and shopping behaviours are already established topics in the social geographic field focusing on retail environments (Golledge and Stimson, 1997; Kunc et al., 2013; Miller et al., 1998; Spilková, 2012a, etc.). Consumption choices and the spatial behaviours of particular shoppers help to organise the net of retail facilities in a way which reflects consumers' wishes and preferences, and thus balances the demand and supply side of retailing logic within shopping spaces. General changes in retailing, as well as many new trends coming from abroad or imposed by globalisation pressures, have formed customers' perspectives and behaviours in either positive or negative manners (Spilková, 2011, 2012b). The dynamics of shopping behaviour is especially interesting to study in the so-called "transition" countries (post-socialist countries of Central and Eastern Europe), where 'catching up' with the developed world in terms of quantity, concentration and lately also in terms of the quality aspects of retailing, has occurred over the last twenty-five years.

The history of Czech retailing is a history of a journey from a centrally planned economy to the installation of a market system at the beginning of the 1990s. The arrival of international retail chains in the Czech Republic and their large-scale retail concepts at that time were a "dream come true" for most Czech customers, who had mainly experienced very limited shopping opportunities during the socialist era. Czechs started to prefer large-scale retail formats (such as hypermarkets, supermarkets, discount stores and shopping malls) to traditional smaller retail facilities (Maryáš et al., 2014; Spilková, 2008). Hypermarkets are now the primary shopping place for food for almost one half (48%) of Czech households, followed by discount stores (24%) and supermarkets (17%: GfK, 2016). Modern, large-scale facilities with 400 m^2 or more then concentrate 80% of the total sales in food and convenience goods, which certainly represents the highest share in Central Europe (Hospodářské noviny, 2016). After two decades of dominance of these retail formats, however, some initial problems have appeared, related mainly to the retail environments

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in these outlets, the quality of goods on sale and some retailers' practices. It seems that Czech shoppers have started a counter trend to this "big box supremacy": namely, dissatisfied customers, who are looking for more intimate ways of shopping and caring more about the goods they buy with respect to their nutrition values, provenance, context of production, etc., have welcomed the first alternative food networks in the Czech Republic (Spilková, 2016). As such alternatives, farmers' markets appeared in 2009–2010, followed by farmer's shops, box schemes, community-supported agriculture and later, community gardens. These alternatives were keenly embraced by consumers across age groups and social strata (Spilková et al., 2013). Despite their popularity, however, they still represent only a small portion of total food sales (estimates range from 5–10%).

This paper addresses the following questions: Who are the customers in these different retail formats? Is it possible to discern certain types of shoppers according to retail formats in the Czech shopping-scape? Do alternative food networks attract significantly different consumers than traditional forms and large-scale outlets? In pursuing these questions, I make use of unique data sets collected in omnibus surveys by The Centre for Independent Public Opinion Research (CVVM) of the Institute of Sociology of the Czech Academy of Sciences, over the periods 2014, 2015 and 2017, with a total sample size of 3,168. The surveys questioned the consumption habits and preferences of a representative sample of the Czech population, among other topics. Our goal is two-fold:

i. to present a profile of shoppers according to the number of food provisioning options: traditional (smaller self-service shops, convenience shops, small counter shops); large-scale (hypermarket, supermarket, discount); and alternative (farmers' markets, box schemes, farm gate, farm shop, etc.); and
ii. to analyse the demographic, socio-economic and geographic factors influencing current trends in the shopping behaviours of Czech consumers.

After an overview theoretical background focusing on shopper typologies and geo-marketing, the data sources and methodology used in this analysis are presented. Results are discussed in the next section, followed by a summary and some concluding remarks.

2. Theoretical background: Shopper segmentation and geodemography

Marketing theorists are fond of diverse shopper typologies, behavioural segmentations of shoppers, motivational or search studies, consumer patronage research, etc. (Sinha and Uniyal, 2005). The shopper typologies emerged during the 1950s as a reaction to the dramatic transformation which shopping had undergone in the USA and Western Europe when entering the phase of mass consumption. Classifications of shoppers have developed ever since and have involved increasingly complex approaches based on evolving knowledge of marketing, sociology, psychology, behavioural science, geography, demography, media studies, etc.

2.1 General shopper typologies

One of the first shopper typologies was published by Stone (1954), who in his seminal work identified four shopper types: economic (price driven); personalising (preferring personal contacts); ethical (with a clear ethical standpoint); and apathetic. An interesting typology was later presented by Kotler (1965), who suggested Marshallian shoppers (economically rational), Freudian shoppers (fantasy driven), Pavlovian shoppers (stimulus prone), Hobbesian shoppers (organisationally based) and Veblenian shoppers (peer group status influenced). In comparison, Stephenson and Willett (1969) proposed four types of shoppers: convenience; recreational; price bargain; and loyal. Subsequently, Johnston presented a 'self-explanatory' typology of pragmatic shoppers, satisfied shoppers, shopping trippers and bargain hunters (Johnston, 1974, in O´Brien and Harris, 2013). During the 1970s, a number of shopper typologies focusing only on female shoppers emerged (Darden and Reynolds, 1971; Darden and Ashton, 1975; Moschis, 1976, Williams et al., 1978, etc.).

Another typology stemming from a comprehensive sample which included both men and women is that of Lesser and Hughes (1986), which has a seven-fold schema: inactive (not interested in shopping); active (interested, like shopping); service (demanding good customer service and friendly personnel); traditional (active people, who do not embrace shopping, but have to shop from time to time); dedicated fringe (want to be different, information seeking, novelty seeking); price (bargain seekers); transitional (usually at the beginning of a family cycle, thus caring for health and life style, but already creating specific shopping habits); convenience (aim to shop easily, do not care about price or service); coupon saver (shopping planned on the basis of action, sales etc.); innovator (impulsive shoppers, looking for new products, status oriented); and unclassified shoppers. Other attempts to develop a typology of shoppers followed (Cullen, 1990; Jarratt, 1996, etc.), but these generally involved all the types and categories already indicated above, generally based on attitudes towards shopping or shopping motives in general terms.

As well as the shopper typologies created from attitudes to shopping and psychographics, there are some typologies created for a specific type of shopping venue, which is an approach closer to the understanding of shopper classification in this paper. As explained further, the retail options assessed in this paper are based on the formulation of questions and their possible responses within the omnibus survey used for the analysis. Traditional, large-scale and alternative provisioning options are considered. The traditional retail options include smaller self-service shops, convenience shops and small counter shops, understood in general as retail facilities smaller than 400 m^2 with a wide assortment of miscellaneous goods serving daily needs. Large-scale retail outlets are comprised of hypermarkets, supermarkets and discount stores. Hypermarkets are, by definition, single-story outlets with a sales area greater than 2,500 m^2 and with a full assortment of foods and a wide assortment of non-food goods. Supermarkets are defined as retail outlets with a complex assortment of food items and a complementary assortment of non-food goods, with sales area between 400 m^2 and 2,500 m^2. Discount stores are retail units of about 400 to 1,000 m^2 of sales area, with a limited assortment of goods and a very quick turnover and high demand frequency, often with a lower quality of the retail/built environment, which is, on the other hand, outweighed by the lower prices (Spilková, 2012b). Alternative options proceed from the definition of alternative food networks as new alliances between consumers and producers, creating experimental spaces of new food provisioning practices (Roep and Wiskerke, 2012): the various formats (farmers' markets, box schemes, farm gate, farm shop, etc.) are explained in Spilková (2016).

Finn et al. (1994) conducted their research in the environment of a large shopping mall and identified five groups of mall-shoppers: light consumers, who came with a clear purpose to buy a particular item; multiple shoppers who planned to shop for more items in more outlets; leisure shoppers who came to the mall mostly for recreation and entertainment; social users who made use of the mall to meet others for coffee or a drink; and combined purpose consumers, i.e. those who had several of the previously-mentioned reasons to visit the mall. Mall shoppers have also been studied by Bloch et al. (1994), whose categories were: mall enthusiasts, who liked to be involved in many activities in the mall including purchasing, services, entertainment etc.; traditionalists, who also engage in many mall-based activities, but primarily focus on shopping and services; grazers, who spend most of their time in the mall eating and observing other shoppers; and the minimalists, who tend to avoid shopping in the mall if at all possible, consider it a loss of time and are uninvolved in the majority of mall activities.

2.2 Shoppers in alternative food networks

Alternative food networks have also already attracted researchers' interests. Rather than a true typology, these works depict a "typical shopper" in these retail forms and describe some basic demographic and socioeconomic characteristics. Lydia Zepeda (2009) based her characteristics of a farmers' market shopper on knowledge and research in various markets across the United States. According to her research, a typical farmers' market shopper is female, motivated by freshness and nutritional value, less sensitive to price, enjoys cooking in general and is often involved in other alternatives to traditional shopping (organic, fair trade, ethnic, cooperative). Baker et al. (2009) produced similar results: typical consumers at the farmers' market were female, in their early 50s, with an annual household income of over $60,000. A common problem often mentioned in foreign literature regarding alternative food networks and their customers is their possible social exclusivity, i.e. the fact they might attract predominantly white, younger, middle- and upper- class urban professionals (Conner et al., 2010; Freidberg, 2004; Morgan, 2010). Similar research conducted at Czech farmers' markets during the first year of their functioning (Spilková et al., 2013), however, found no evidence of such signs of social exclusivity, revealing instead customers of different ages (including many pensioners), and wide-ranging educational and economic backgrounds, all motivated by the pursuit of freshness and taste.

In fact, the typology of farmers' market customers is not a straightforward research task, since individual characteristics alone do not serve as good proxies for determining behaviours. A combination of demographic, socioeconomic and lifestyle characteristics make up a typical farmers' market shopper, and contextual differences unique to a given community also play a role. Byker et al. (2012) tried to sum up existing knowledge about farmers' market shoppers in the US by looking at wide-ranging research on the topic. They concluded that farmers' market patrons are more likely to be female, although this might be affected by the fact that most men tend to refer primary food shopping and cooking responsibilities to women - rather than because they shop at other food-selling formats. The age of farmers' market shoppers, according to these studies, was slightly higher (40 years and over). With respect to income, the results were inconclusive: some studies found higher income categories, while others found shoppers with incomes lower than expected. This suggests that willingness and motivation to pay for food at the market is a better predictor than income alone and that the consumers value also the non-monetary aspects of the markets. Byker et al. (2012) determined that education was the best predictor of farmers' market (and other direct-market) shoppers, stating that most studies confirmed that these retail forms attract highly-educated individuals (college and higher education).

Nevertheless, it is obvious that studies focusing on motivations to shop at farmers' markets, rather than consumer demographics, prevail in Western academia. Carey et al. (2011) created a typology of farmers' market shoppers in Scotland based on motivations, revealing that freshness, a passion for cooking and the nutritional value of the products on sale being the most important factors, followed by environmental motivations and support for local farmers. Canadian shoppers (Feagan and Morris, 2009) also highly valued the freshness of produce at farmers' markets, and also mentioned factors such as support to local farmers, a healthy diet, social interaction and community life. Byker et al. (2012) also list motivational factors of US shoppers as fresh food, high quality, supporting local agriculture and the social appeal of farmers' markets. As well, Elepua and Mazzocco (2010) created a typology of farmers' market shoppers, identifying five groups differing significantly in demographic characteristics and behavioural attributes: market enthusiasts, recreational shoppers, serious shoppers, low-involved shoppers and basic shoppers.

As a representative of "other-than-farmers' market" alternatives, a unique typology of box schemes' shoppers in the Czech Republic by Unčovská (2011) was inspired by Mary Douglas's Cultural Theory. Three groups of box scheme buyers were identified: "biomaximalists" (those who try to cover all the household's needs with organic products); "bioseekers" (organic vegetables are the base and are complemented by other different products, becoming increasingly involved in sustainable consumption habits); the last group are "bioboxers" (buying only the organic box from a box scheme, not interested in other alternative food options). It is interesting that most of the respondents were also women. In another study of box schemes, despite the lack of coherent demographic or social structure studies, Spilková and Šifta (2016) found a heterogeneous group of buyers (organic seeking mothers, status-seeking gourmands, etc.) who, however, tend to be more interested and involved in sustainable consumption. The available Czech and foreign research reports suggest that box scheme customers tend to be individuals and families with higher incomes (Thom and Conradie, 2013; Seyfang, 2003; *inter alia*).

2.3 Geodemographic systems

It is obvious that the choice of shopping place is impacted by a multidimensional matrix of factors on the level of an individual (demographic characteristics, socio-economic profile, behavioural aspects, life style, etc.), community (social and non-monetary benefits), and on a wider political range (support for local farmers, the animal welfare movement, sustainable consumption, etc.). Shoppers of some particular retail formats cannot be categorised on the basis of a simplified and summarised general model (Kunc et al., 2016). From the preceding review, it is also clear that there is insufficient research on the geodemographic characteristics of alternative food network shoppers, and even fewer studies which take into consideration the localities in which retail facilities are located. It is known from the literature, however, that contextual and situational influences affect shoppers' behaviours (Sinha and Uniyal, 2005) and diversify the consumer base of various retail formats (Byker et al., 2012). It is therefore also necessary to introduce the approach of geodemography and geodemographic systems, the relevance of which has increased with the transition from a centrally-planned to a market economy with an increasing spectrum of market segments and consumer lifestyles. Geographers play an important role in this situation by creating spatially-defined segmentation schemes, which help retailers to know who their customers are and where they live, as well as which products or services they demand (Spilková, 2012b).

A geodemographic system can be defined as one which helps the retailers' decision-making processes. It is an information technology, assisting the retailers to predict the reactions of their customers, based on statistical models of the latter's identity and residence (Goss, 1995). Geodemographic practice within retail expertise (sometimes also labelled as "geo-marketing") gathers spatial data about consumers, constructs statistical models of their identity, and maps the distribution of their characteristics and shopper types. This process combines large electronic databases, geographical information systems and shopper typologies. Geodemographic systems usually (Spilková, 2012b) comprise data about geography (place of residence, region, area, population, etc.), demography (age, gender, family status, education, religion, income, etc.), psychography (lifestyle, values, personal traits, etc.) and consumer behaviours (attitudes to shopping, loyalty, experience, price sensitivity, etc.).

One critic of geodemographic systems, Jon Goss (1995), points out that these approaches are prone to using simplifying assumptions: first, that the identity of a consumer can be reduced to a file of measurable demographic and psychosocial characteristics to create a complex shopper typology; second, that a shopper's identity predicts their behaviour and consumption patterns, thus, based on their segmentation position, it can be assumed what their behaviours in other aspects of consumer behaviour will be; and third, they suggest that residential location is a determining factor of identity and behaviour, stemming from a generally recognised fact that similar people with similar lifestyles "cluster" within the same localities. It is evident that geodemographics present a substantial reduction of reality. On the other hand, this approach aims to explain consumer patronage and behaviours by a combination of both "subjective" (individual, behavioural, psychological) and "objective" (areal) variables within a given geographical area and settlement system context, and it also has many supporters among both practitioners and scholars.

3. Data and methods

This paper is based on an analysis of a unique data source gathered during three waves of an omnibus survey realised in the project: "Socio-geographical indicators reflecting attitudes of the Czech population: database acquisition" by the Center of Independent Public Opinion Research (CVVM in Czech). Representative samples of the Czech population 18 years of age and older were reached (1,076 in 2014, 1,013 in 2015 and 1,079 in 2017). The survey used quota sampling methods, with the following stratification factors: NUTS 3 regions, population size, gender, age and education. The survey was conducted through direct interviews using a paper questionnaire ("PAPI": paper and pen interview method). The omnibus character of the survey meant that a different version of the questionnaire was used each year, but questions about principal shopping destinations and on alternative ways of food provisioning remained the same during the three waves of the survey. The same structure applied to a range of questions about the respondent's basic characteristics and there were no significant differences in terms of broad demographic characteristics between the three waves. It was therefore possible to merge the three datasets for each year based on the same set of questions and indicators.

Regrettably, there is no information on the shopping motivations and consumer attitudes of the respondents. Therefore, the analysis presented here is methodologically closer to a geodemographic approach, since there are responses to the primary shopping destination and some alternatives in food shopping, as well as an array of demographic, socio-economic, geographic and some psychographic variables for the respondents.

The key questions posed were as follows:

- "In what type of retail outlet do you mostly shop for food?" (possible responses: hypermarket, supermarket, discount store; smaller self-service shop; convenience shop/Asian convenience shop; small counter shop; other; does not shop for food); and
- "Do you, at least occasionally, acquire food by any of these forms?" (possible responses coded as "yes" or "no" for the following: shopping at farmers' markets; ordering of boxes in a box scheme; direct on-farm sale; shopping in farmers' shops; self-provisioning; foraging).

The characterising variables used for classifications and other analyses were: age, gender, education, occupation, family status, household size, number of children, household income, personal income, place of residence, type of residential area, type of housing, etc.

Statistical analysis was carried out using SPSS (version 20.0). The results were obtained mainly by descriptive statistics and testing hypotheses of similarities or differences of given shopper populations by contingency analysis. For associations between dependent variables and shopper characteristics, the calculation of contingency coefficients (CC) was applied.

Altogether (over the three waves), the sample comprised 3,168 respondents, 48.8% of whom were male and 51.2% were female. The mean age was 46.6 years (SD 17.1). Almost six of ten (59.4%) respondents were economically active and 40.6% economically inactive. The largest group of respondents (27.3%) were regular employees, 10.3% were individual entrepreneurs and 24.5% were retired. Slightly more than one-third (35.3%) of the respondents had attained secondary education without a graduation exam and vocational training, 32.8% had secondary education with graduation exam, 16% had finished some level of tertiary education, and 15.8% had received only an elementary education. Half of the respondents were married or in a partnership, 28% were single, 12.7% were divorced and 8.5 were widowed. Around one third of the respondents lived in a housing estate (32.8%), 28.5% lived in a family house, 18.6% in an apartment and 15.3% lived in a terraced house. Most of the respondent households had two members (35.8%), 21.2% of the households had three members, 19.4% four members and 18.3% were single households. Over two-thirds (68%) of the families were without children under 18 years, and families with children had mostly one (15.9%) or two children (13.4%) under 18 years.

The responses regarding the main shopping place are presented in Table 1. It is obvious that most of the respondents prefer large-scale retail outlets such as hypermarkets, supermarkets and discount stores. About one fifth of the respondents use smaller self-service shops, and the remainder of the retail formats (as presented) has a much lower patronage (around 3% of the respondents).

Table 2 shows the occurrence of alternative types of shopping for food and food provisioning. More than half of the respondents (58%) have some experience with foraging, and a high percentage of them (45.8%) also use some self-provisioning when acquiring their food. As regards the alternative food networks, the most popular form are the farmers' markets (37.5% of the respondents do sometimes shop there) and direct shopping at the farm gate (23% of respondents). Farmer shops are used by almost 18% of respondents and box schemes are utilised by 4.6% of respondents.

4. Results and discussion

In the results section the various shopping formats will be discussed and their patrons will be characterised. In further analysis, the respondents who indicated that they do not shop for food or chose "other" as their shopping place, will be excluded from the discussion of results. Also, the shoppers who responded that they are involved in self-provisioning and foraging are not analysed further as these forms of food provisioning do not fall under the category of

Shopping place for food	n	%
hypermarket, supermarket, discount store	2,214	70.0
smaller self-service shop	649	20.5
convenience shop/Asian convenience shop	91	2.9
small counter shop	105	3.3
other	10	0.3
does not shop for food	93	2.9
total	**3,162**	**100.0**

Tab. 1: Main shopping place of respondents (valid responses). Source: CVVM 2014, 2015, 2017

Alternative types of shopping and food provisioning		n	%
farmers' market	yes	1,185	37.5
	no	1,979	62.5
box scheme	yes	146	4.6
	no	3,017	95.4
on farm	yes	729	23.0
	no	2,435	77.0
farmer shop	yes	565	17.9
	no	2,598	82.1
self-provisioning	yes	1,448	45.8
	no	1,716	54.2
foraging	yes	1,834	58.0
	no	1,329	42.0

Tab. 2: Alternative types of shopping reported by respondents (valid responses). Source: CVVM 2014, 2015, 2017

retail and retailing. The categories of personal income and household income were not included in the first analysis, because a large proportion of respondents refused to answer the questions on their income situation. As a proxy to the socio-economic situation of the respondent, education and occupation are used and understood to be indicative of the individual's financial situation.

4.1 Large-scale and traditional retail forms and their customers

Some general characteristics of shoppers in large-scale and traditional formats can be derived from Table 3. Large-scale retail outlets have a relatively balanced customer base from the gender point of view. When it comes to age, they are visited mainly by customers in the age range 35–44 years (20%) and 25–34 years (19.2%). Their customers are mostly secondary graduated (35.3%) or with secondary and vocational training (34.2%). These outlets reported the highest percentage of married customers (almost 54%). They are from households with two (36.2%) or three and four members (22.9%, respectively 20.1%) and they are having one (17.5%) or two (15%) children up to 18 years. These shoppers lived in housing estates (almost 36%) or in family houses (26%).

Smaller self-service shops attract slightly more females than males (56% versus 44%). In terms of age, the customers are mainly those aged over 65 (25.4%) and aged 55–64 (19.9%). Most of their customers had a secondary education without graduation (39%). They were mostly married (45.7%), single (27.8%) or widowed (14.8%). They came from two member or single households (37%, respectively 24%), predominantly without small children (76.4%). They lived mainly in single family houses (34%) or housing estates (25%).

Convenience, or Asian convenience shops, had a predominantly male customer base (68%). In terms of age, their customers are recruited from the age groups 25–34 (23.1%), and 18–24 (19.8%). The education of their shoppers is mainly elementary (31.1%) and secondary or vocational (25.6%). Single people represented 46.2% of the convenience shops customers. They came mostly from two-person households (31.1%) or three-person households (26.7%) and having most often one child under the age of 18 (17.6%). As regards the type of dwelling, these customers live mostly in housing estates (35.1%) or family houses (31.6%).

Small counter shop customers were predominantly male (59% versus 41% female). One third were 65 years and older, but also one fifth of them were middle-aged (19%: 35–44 years). They mostly had an elementary (32.4%) or secondary education without graduation (31.4%). Their distribution according family status was more equally distributed than in the case of other retail forms under study, with most of them married (39%) or single (26.7%). They came from single member or two-member households (37.1% respectively 28.6%). One third of them lived in family houses, followed by terraced houses (22.7%) and housing estates (18.7%).

An analysis of specific associations between the preferred retail forms and customer characteristics also reveals interesting findings. As already suggested, gender is slightly but significantly associated with a preferred retail format (CC [contingency coefficient] = 0.137, $p < 0.001$), with significantly more men shopping in convenience and Asian convenience shops than women. Age is also significantly related to a preferred retail format (CC = 0.211, $p < 0.001$):

Independent variable		Hypermarket, supermarket, discount store	Smaller self-service shop	Convenience shop/Asian convenience shop	Small counter shop
gender	male	47.7	44.1	68.1	59.0
	female	52.3	55.9	31.9	41.0
age	18–24	9.9	10.8	19.8	10.5
	25–34	19.2	16.3	23.1	12.4
	35–44	20.0	13.7	15.4	19.0
	45–54	17.8	13.9	17.6	11.4
	55–64	16.7	19.9	13.2	13.3
	65+	16.4	25.4	11.0	33.3
education	elementary	12.9	19.5	31.1	32.4
	secondary w/o graduation, vocational	34.2	38.9	35.6	31.4
	secondary with graduation	35.3	28.3	25.6	23.8
	tertiary	17.6	13.3	7.8	12.4
family status	single	26.8	27.8	46.2	26.7
	married	53.9	45.7	25.3	39.0
	divorced	13.0	11.7	17.6	18.1
	widowed	6.4	14.8	11.0	16.2
household members	1	15.9	24.1	25.6	37.1
	2	36.2	37.1	31.1	28.6
	3	22.9	15.9	26.7	10.5
	4	20.1	16.8	14.4	14.3
	5 and more	5.0	6.1	2.2	9.6
children under 18 years	1	17.5	11.6	17.6	10.5
	2	15.0	9.8	8.8	9.5
	3	2.4	2.0	1.1	3.8
	4 and more	0.5	0.2	0.2	1.0
	no children under 18 years	64.5	76.4	70.3	75.2
type of dwelling	apartment house	19.6	16.2	21.1	13.3
	housing estate	35.9	25.2	35.1	18.7
	residential house	2.7	2.0	3.5	4.0
	terraced house	13.9	19.8	7.0	22.7
	family house	26.1	33.9	31.6	33.3
	other	1.8	2.9	1.8	8.0

Tab. 3: Basic characteristics of customers in large-scale and traditional formats (relative frequencies by various retail formats). Source: CVVM 2014, 2015, 2017; author's calculations

significant residuals (differences between observed and expected frequencies) are reported in the cases of younger people (18–24 years) shopping significantly more often in convenience shops, while older people (65+) prefer the smaller self-service shops and small counter stores, avoiding large-scale retail formats, and the middle-aged group of 35–44 years who shop significantly more often in large-scale retail formats and less often in smaller self-service shops.

Education is another significant factor with the preferred shopping place (CC = 0.170, $p < 0.001$). Significantly more people with only an elementary education use small counter shops and convenience shops, as well as small self-service shops. These findings correspond with previous surveys of shoppers (Spilková, 2012b), which showed that smaller self-service shops are chosen more often by people with lower education and lower incomes. In contrast, significantly more people with a secondary education with graduation and tertiary education, shop for food in large-scale outlets. The association between shopping place and family status also shows significant results (CC = 0.184, $p < 0.001$), documenting the fact that married people significantly prefer large-scale retail formats to the other types of shopping venues; singles, on the contrary, have greater standardised residuals in the case of convenience or Asian convenience shops (which are largely avoided by married respondents). Widows and widowers have significantly more preference for small self-service shops and small counter shops. Family situation is also reflected in the results for family size and number of children under 18 (CC = 0.201, $p < 0.001$, respectively CC = 0.140, $p < 0.001$), again demonstrating that single households significantly prefer small counter shops and smaller self-service shops and avoid large-scale formats, and families with children prefer large-scale formats and avoid smaller self-service shops.

These results also confirm some previous findings from the monitoring of shoppers (Spilková, 2012b), which showed that hypermarkets are preferred by more educated people and shoppers from families with children. Occupation is also significantly related to preferred shopping format (CC = 0.270, $p < 0.001$), with interesting results gained from the residuals analysis. Pensioners have a strong preference for small self-service shops and small counter shops and significantly more often avoid large-scale formats. In contrast, large-scale outlets are the preferred destinations for persons in managerial positions and general employees. Both of these labour groups, as well as entrepreneurs, avoid smaller self-service shops. Unemployed people quite clearly prefer convenience or Asian convenience shops and small counter shops. The preferred shopping format also relates to the type of dwelling (CC = 0.208, $p < 0.001$), with significantly more people from housing estates shopping in large-scale outlets and avoiding smaller self-service shops and small counter shops, and small self-service shops being more often preferred by people from both terraced and individual family houses.

Another step in the analysis is the geographical perspective. Geography, obviously, influences the potential clientele of various retail formats with respect to the distribution of shopping opportunities and the structure of the population. As Table 4 shows, large-scale format customers are scarce only in the smallest villages, but their distribution in settlements above five thousand inhabitants is quite even. This is the result of the deconcentrating strategies of foreign retailers in the Czech Republic. As the largest Czech cities became saturated by large-scale retail formats, the focus of new development shifted into smaller cities. These locations have witnessed the emergence of new retail formats – smaller hypermarkets and smaller shopping centres appropriate to the size and purchasing power of the non-metropolitan area population. These "smaller versions" of hypermarkets were soon followed by discount store chains, competing successfully for the first-comers and gaining in popularity since about 2003 (Spilková, 2012b). In contrast, smaller self-service shops and convenience shops are typical for the smallest and smaller settlements (800–14,999 inhabitants) and then decline in patronage for the larger cities. They are traditionally used by customers in settlements where the offer of other retail formats is limited (Spilková, 2012b). Small counter shops again evince a dichotomy: their patronage gradually decreases from the smallest villages to cities with populations of around 80,000. This decline obviously describes the situation of small counter shops serving convenience shopping purposes. The higher proportion of their customers reappears again in the category of cities with over 80,000 inhabitants and the larger cities, where they are more likely to be small specialist stores with a niche clientele. This relation between the main shopping place and size of residence is also documented by a statistically significant result of contingency analysis (CC = 0.303, $p < 0.001$).

Figure 1 depicts the distribution of the main shopping place formats in Czech regions. The large-scale formats prevail in all Czech regions, but their position is far stronger in the capital city and the north-western part of the country. North-western Bohemia is also that part of the country with important percentages of shoppers in convenience and Asian convenience shops, which on the contrary, are quite insignificant in the Vysočina region and Moravia. The proportion of smaller self-service shops and small counter shops also has a clear west-east gradient. The association between the main shopping place and region is statistically significant (CC = 0.252, $p < 0.001$), showing significant positive residuals (a significantly higher proportion than would be expected) for customers of large-scale retail formats in Prague and the Ústí nad Labem region, for customers of smaller self-service shops in Plzeň, Pardubice, Vysočina and the Southern Moravian region, for convenience shop customers in Plzeň, Karlovy Vary and the Ústí nad Labem region, and for small counter shops in the Moravian-Silesian region.

4.2 Alternative food networks and their customers

Table 5 depicts the basic characteristics of customers with some experience of alternative ways of food shopping. At first glance, the differences may not be as obvious as in the case of large-scale and traditional retail formats. Farmers' markets are more often used by women (59%). Their customers are younger and middle-aged (20% in 25–34 years, 21% in 35–44 years groups). In terms of education they are mostly with secondary education with graduation or vocational (35.7%, respectively 31.5%). As regards the family status, they are mostly married or single (56%, respectively 23.6%), and people from smaller households, with one or two children. Their customers typically live in housing estates (34.3%), family houses (28.3%) or flats in apartment houses (19.9%).

Box schemes are a predominantly female format (62.3%). They are attracting mostly middle-aged customers (23.3% in 35–44 years, 19.9% in 45–54 years groups). In terms of

Size of residence	Hypermarket, supermarket, discount store	Smaller self-service shop	Convenience shop/ Asian convenience shop	Small counter shop
less than 799	7.2	13.1	4.4	32.4
800–1,999	11.7	20.5	20.9	20.0
2,000–4,999	8.1	20.5	23.1	10.5
5,000–14,999	15.4	15.6	14.3	6.7
15,000–29,999	15.6	7.4	5.5	6.7
30,000–79,999	12.5	6.5	6.6	2.9
80,000–999,999	14.3	8.5	8.8	14.3
1,000,000 and more	15.1	8.0	16.5	6.7

Tab. 4: Distribution of responses to the main shopping place with respect to the size of residence (relative frequencies in various retail forms). Source: CVVM 2014, 2015, 2017; author's calculation

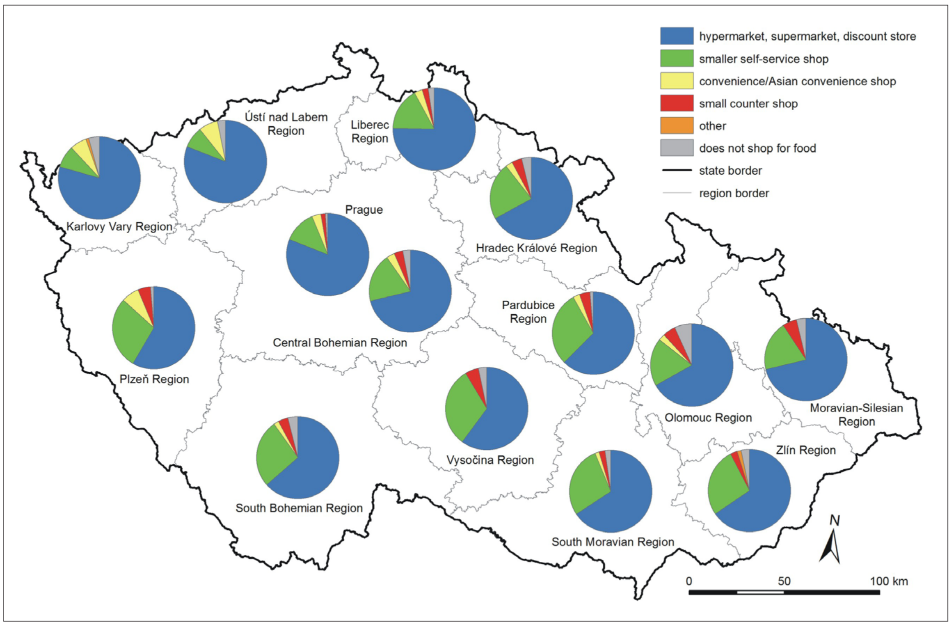

Fig. 1: Main shopping place according to Czech regions
Source: CVVM 2014, 2015, 2017; author's calculation

education they are preferred by customers with a secondary education without graduation or with graduation (38.6%, respectively 33.8%). Their families tend to be slightly larger than in the previous case, as well the children in their households are more numerous. People from single family houses prevail (36%), followed by customers living in flats within housing estates (25.8%).

On farm shopping is more gender equal. It is having its supporters both in younger middle-age (22% in 35–44 years) and in older respondents (19% in 65+ years). Again, most of the shoppers on farms have a secondary education with or without graduation. In terms of family status, they are predominantly married (70%), and from smaller households (37.9% from two-member households). They are living mostly in a family house (38.6%) or housing estate (26.5%).

Farmer shop customers are more likely to be women (57.3%). As regards their age, they are middle-aged and younger (21.1% in 35–44 years, respectively 19.8% in 25–34 years groups). They tend to have a secondary education with or without graduation, and we also see about a quarter (26.1%) of farmer shop customers with a university degree. Also, the family structure is more balanced. Although the majority of these shoppers are married (53.4%), there is a high percentage of singles (26.4%) and divorced people (13.5%). They come from smaller families with one or two children. They live mainly in housing estates or family houses (34.3%, respectively 24.4%).

Again, we continue with an analysis of residuals to uncover where are the largest similarities or differences of given shopper populations according to their characteristics. Shopping at farmers' markets reveals significant associations with gender ($CC = 0.121$, $p < 0.001$), with significantly more women shopping there. Such results are typical for studies aimed at farmers' market shoppers elsewhere (Byker et al., 2012; Zepeda, 2009). Also, the association with age is statistically significant ($CC = 0.120$, $p < 0.001$), with significantly more customers in the age category of 35–44 years and less in the group of 18–24 years. Education is also significantly associated with shopping at farmers' markets ($CC = 0.194$, $p < 0.001$), with a prevailing higher number of customers with a tertiary education. In contrast, these markets are mostly avoided by people with only an elementary education and/or with vocational training. Education was also found to be a key determinant of shopping at farmers' markets in other studies (Byker et al., 2012). This fact is even more accentuated in the analysis of farmers' market patronage and occupation ($CC = 0.218$, $p < 0.001$), where managers, entrepreneurs, general employees and mothers on maternity leave have the largest positive residuals for this type of shopping venue, opposed to unemployed people, pensioners and students. Although these results could lead to conclusions of social exclusivity at farmers' markets (Spilková et al., 2013), more detailed surveys aimed not only at shoppers' demographic characteristics but also at their values and motivations would be needed to confirm this statement. Family status also reveals that married people shop at farmers' markets significantly more often than other groups ($CC = 0.097$, $p < 0.001$), mostly those having one child in the family ($CC = 0.106$, $p < 0.001$). The type of dwelling, however, did not show any significant association with shopping at farmers' markets, which documents the fact that farmers' markets have quickly spread to all regions of the country, both urban and rural (Spilková and Perlín, 2013), and today represent a traditional shopping opportunity for food and fresh local produce, wherever.

Ordering a pre-paid box with food was earlier indicated as the least frequent form of alternative food network in the given sample. As shown in the results from our data, gender plays a key role in the box scheme demographic, ($CC = 0.049$, $p < 0.05$) with slightly more women ordering boxes. Occupation is also a factor ($CC = 0.097$, $p < 0.001$), with significantly more people in managerial positions and women on maternity leave using box schemes. There is also a weak association with the number of children in the family ($CC = 0.069$, $p < 0.05$). These results clearly demonstrate that box schemes above all present a convenient way of shopping for quality food for customers with limited mobility (mothers on maternity leave) or time (managers, larger families) (Spilková and Šifta, 2016; Unčovská, 2011).

Independent variable		Farmers´ market (n = 1184)	Box scheme (n = 146)	On farm (n = 729)	Farmer shop (n=565)
gender	male	41.0	37.7	44.6	42.7
	female	59.0	62.3	55.4	57.3
age	18–24	7.1	8.2	6.7	9.0
	25–34	20.0	18.5	18.5	19.8
	35–44	21.0	23.3	22.0	21.1
	45–54	18.3	19.9	16.2	18.9
	55–64	16.7	16.4	17.6	16.6
	65+	16.9	13.7	19.0	14.5
education	elementary	9.5	9.0	10.6	8.2
	secondary w/o graduation, vocational	31.5	38.6	33.7	30.6
	secondary with graduation	35.7	33.8	34.5	35.2
	tertiary	23.4	18.6	21.2	26.1
family status	single	23.6	21.4	21.5	26.4
	married	56.0	60.7	70.0	53.4
	divorced	13.2	10.3	9.9	13.5
	widowed	7.1	7.6	6.6	6.7
household members	1	14.2	12.8	12.1	14.0
	2	38.0	30.5	37.9	35.4
	3	23.2	24.1	21.9	23.1
	4	18.7	25.5	20.8	20.2
	5 and more	6.0	7.1	7.3	7.3
children under 18 years	1	19.8	20.7	18.1	19.5
	2	15.0	20.7	17.0	15.2
	3	2.9	4.1	3.3	4.6
	4 and more	0.4	0.7	0.7	0.5
	no children under 18 years	61.8	53.8	60.9	60.1
type of dwelling	apartment house	19.9	14.6	14.3	15.4
	housing estate	34.3	25.8	26.5	34.3
	residential house	2.7	6.7	2.0	3.4
	terraced house	13.8	15.7	16.7	21.6
	family house	28.3	36.0	38.6	24.4
	other	1.0	1.1	1.8	0.8

Tab. 5: Basic characteristics of customers of alternative food networks (relative frequencies by various alternative formats).
Source: CVVM 2014, 2015, 2017; author's calculations

Direct shopping at farms is again significantly related to gender ($CC = 0.047$, $p < 0.05$) and age ($CC = 0.086$, $p < 0.001$), with women in younger middle-ages (35–44) prevailing. Again, it is preferred mainly by people with a university degree ($CC = 0.102$, $p < 0.001$), entrepreneurs, managers and women on maternity leave ($CC = 0.115$, $p < 0.001$). Family status – being married - is associated with shopping at farms ($CC = 0.126$, $p < 0.001$), together with being from a larger household and having two children. As regards the type of living, the association is statistically significant ($CC = 0.146$, $p < 0.001$) revealing the largest positive residuals for customers from individual family houses. These results imply that direct shopping at farms is favoured by people who care about the provenance of their food and who also have such opportunities at their disposal and are sufficiently mobile.

Shopping in farmer shops is, unsurprisingly, associated with gender to a slight degree ($CC = 0.058$, $p < 0.05$) and age ($CC = 0.072$, $p < 0.05$) with significantly less people in the age group 65+ shopping in farmer shops. This may be caused by the price levels in farmer shops which tend to be higher (Syrovátková, 2016a, b). It is also related to education ($CC = 0.151$, $p < 0.001$) where the predominance of tertiary educated customers of farmer shops is especially strong. The exclusivity of shopping in farmer shops is evidenced also by the relation to occupation ($CC = 0.169$, $p < 0.001$), as the groups with highest positive residuals are managers and entrepreneurs. It is not associated with family status, although the size of household and a high number of children in the family has some statistical influence ($CC = 0.083$, $p < 0.05$; respectively $CC = 0.096$, $p < 0.05$). Type of dwelling also relates to shopping in farm shops

(CC = 0.108, $p < 0.05$) with prevailing shoppers from terraced family houses. All these results support the previous findings of Syrovátková (2016b), who defined farmer shops' customers as those giving priority to quality before price and to a healthy life style (the so-called "foodies").

A geographical analysis of involvement in alternative food networks does not show such a clear picture as in the case of traditional and large-scale formats. Table 6 shows relatively equal distributions of respondents having some experience with shopping in alternative food channels with respect to the size of residence place. Attending farmers' markets is significantly associated with the size of residence (CC = 0.188, $p < 0.001$), having significantly more shoppers in Prague (1 million and more) and in cities with between 15,000 and 29,999 inhabitants. There is also a weak association between box scheme use and residence size (CC = 0.072, $p < 0.05$), with significantly more customers of box schemes in the smallest villages and then again in the medium-sized cities between 15,000 and 29,999 inhabitants. Shopping directly from farms is also related significantly to size of residence (CC = 0.128, $p < 0.001$), with the highest positive residuals for shoppers from the smallest villages up to 799 and between 800 and 1,999 inhabitants. Shopping in farmer shops is not significantly associated with size of residence and, as Table 6 shows, farmer shops find their customers equally in almost all the settlement size categories.

Also, the map visualisation in Figure 2 does not show any clear spatial pattern for shoppers in the alternative food networks under study. This is the result of the fact that these networks depend to some extent on the potential of local food production and possibilities of small farmers in

Size of residence	Farmers´ market (n = 1184)	Box scheme (n = 146)	On farm (n = 729)	Farmer shop (n=565)
less than 799	6.9	16.4	13.4	9.4
800–1,999	12.8	11.6	19.2	11.3
2,000–4,999	6.9	8.9	10.8	10.4
5,000–14,999	14.3	11.6	14.5	13.6
15,000–29,999	15.9	19.2	13.2	15.6
30,000–79,999	11.0	9.6	8.4	10.4
80,000–999,999	12.8	13.0	8.9	14.3
1,000,000 and more	19.4	9.6	11.5	14.9

Tab. 6: Distribution of responses on shopping in alternative food networks with respect to the size of residence (relative frequencies for alternative retail forms)
Source: CVVM 2014, 2015, 2017; author's calculations

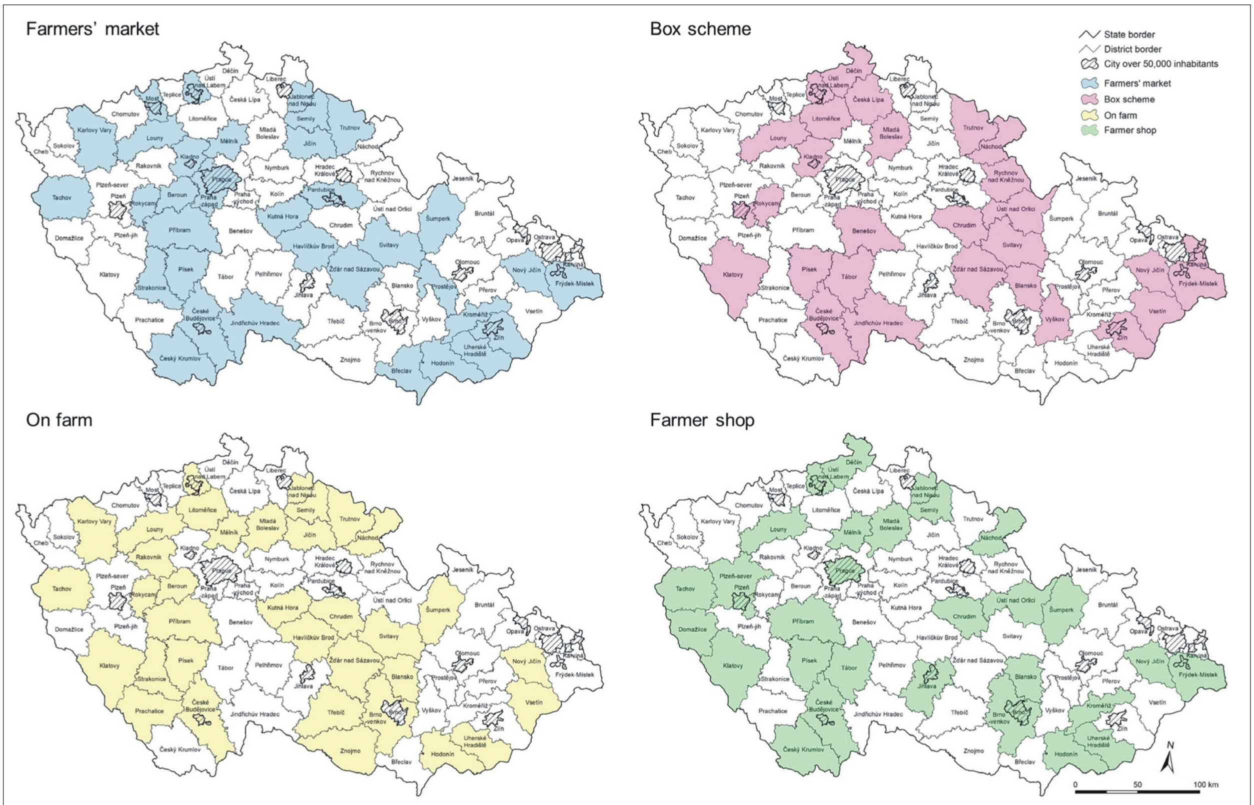

Fig. 2: Alternative food networks – districts with above-average involvement in alternative types of shopping
Source: CVVM 2014, 2015, 2017; author's calculations

particular parts of the country (Syrovátková et al., 2015). Their customers therefore also concentrate in regions where the offer of alternative types of shopping are available and farmers are willing to start these alternatives.

Shopping at farmers' markets relates significantly to region (CC = 0.176, $p < 0.001$), with a predominance of market shoppers only in Prague and a significant lack of them in the Moravian-Silesian, Olomouc and Karlovy Vary regions. Box schemes also have a statistically significant association with region (CC = 0.109, $p < 0.001$), with positive residuals for Pardubice and Ústí nad Labem regions. Shopping directly at the farm's gate shows higher residuals only in the South Moravian region (CC = 0.100, $p < 0.05$) and farmer shops in the South Bohemian and Plzeň regions.

5. Conclusions

The objective of this paper was to characterise shoppers according to traditional, "post-traditional" large-scale and alternative food shopping options. Statistical analyses were carried out to reveal demographic, socio-economic and geographic factors affecting the choice of the main shopping place for food and some alternatives of the food shopping behaviours of Czech consumers. The results show that the large-scale retail forms are used mainly by customers of younger and middle age groups, those with a higher level of education, married persons, those from larger families with small children, respondents in positions of ordinary employees or in managerial positions, those living predominantly in housing estates or family houses, almost anywhere in the country, with a special predominance in Prague and the north-western part of the country. Smaller self-service shops are preferred by older people and pensioners, from small households of two or from single household (e.g. widows and widowers), and those with a lower education than in the previous case, living mainly in family houses of smaller settlements, predominantly in the Plzeňský region, the inner periphery (Vysočina and Pardubice regions) and southern Moravia.

When we move to smaller forms of retail provision, the percentage of male shoppers increases, as well levels of education decrease, and the households are smaller. Convenience shops or specifically Asian convenience shops are a format dominated by younger respondents (under 35 years of age), lower educated men (elementary or vocational), those from smaller households or singles again, often unemployed, and respondents living in smaller settlements, predominantly in north-western Bohemia. Small counter shops, in contrast, represent a retail format with a highly varied customer base. They attract more men than women, however, both in the oldest age group as well as in the middle-aged group, from different family status groups and household sizes. This is probably the result of the fact that in the questionnaire, it was not specified if a traditional, more convenience-type counter shop for quick and incidental shopping or rather a specialised counter shop for specific clientele, was considered. This would imply that the number of older (65+) customers, pensioners and those unemployed from the smallest settlements in the first case, and also the representation of younger, married people with families, from terraced houses and living in the largest cities in the latter case of a counter shop.

Alternative food networks, in general, appear to be preferred by women, highly educated people, in managerial positions or entrepreneurs. There are some differences, however, between the various types of these alternatives. Farmers' markets are patronised by younger customers, married, educated, with children or also singles, especially in Prague. Box schemes are used by slightly older women from larger families with children, and often also by women on maternity leave. Shopping directly from farms is favoured by people in the middle age and older groups, highly educated, married, from households with more children, living in single family houses in smaller villages, especially in Southern Moravia. Farmer shops show some evidence of exclusivity as preferred by younger customers, highly educated, from managerial positions or entrepreneurs, from terraced or single-family houses anywhere where these options are available.

Our results demonstrate that there are significant differences between the customers of diverse retail formats. The analysis also shows that, although the demographic and socio-economic characteristics of shoppers are still important features of their segmentation, their shopping place or alternative possibilities to acquire food are also among the most important distinguishing factors characterising Czech shoppers. Alternative food networks obviously represent a new aspect of shopper behaviour profiling and further research on shopper profiles and typologies should take these options into consideration, together with a full range of possible psychographic and socio-demographic determinants.

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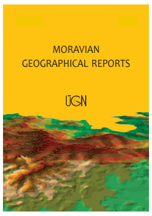

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From school benches straight to retirement? Similarities and differences in the shopping behaviour of teenagers and seniors in Bratislava, Slovakia

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Abstract

The shopping behaviours of teenagers in shopping centres in Bratislava (Slovakia) is compared to those of seniors in this paper. The analysis focuses on the perception of shopping centres by teenagers and seniors in the context of time (shopping frequency), social (with whom they shop) and financial (amount of money spent) factors. The survey was conducted on random samples of 504 teenagers and 431 seniors. To test the hypotheses, group means were evaluated (Analysis of Variance models). When assessing the spatial aspects of teenagers' and seniors' shopping behaviours, a concentric zone approach was used. It can be concluded that Bratislava teenagers are not as sensitive consumers as seniors in the context of the variables assessed in the survey. Teenagers perceive shopping centres as a normal part of their consumption behaviours. Seniors perceive the shopping centres less positively and they spent a shorter time there. Also, in the case of seniors, the frequency of their visits to shopping centres increased in the context of their positive perceptions.

Keywords: *shopping behaviour, teenagers, seniors, shopping centres, Bratislava, Slovakia*

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1. Introduction

The transformation of retailing in post-socialist countries engendered changes in consumer behaviours (Kunc et al., 2013; Spilková, 2012a, 2012b), in the context of demographic processes as well as changes in consumer mobility for services in the context of the shopping gradient (Maryáš et al., 2014).

With the 21st century, new challenges have come to retail in Slovakia in terms of the continuous creation of new types of shopping equipment (shopping centres, big boxes, online sales, mail order sales and more). Original urban types of shopping centres concentrated in the city centre are confronted with outlets combining traditional shopping methods with convenience, commercial activities and operational advantages in shopping centres. These changes create a diverse set of shopping formats with distinctive functional characteristics, as well as their deployment in space. It can be noted that the new types of shopping formats that appeared on the market in terms of the rebirth and diversification of shopping, do not replace automatically existing shopping formats (Coleman, 2012). The coexistence of different shopping formats is part of the varied retail activities in an urban environment.

The popularity of shopping centres in Slovakia is constantly growing. According to the Shopping Centre Index (SCI), in 2016 shopping centres in Slovakia were visited by 63 million people (which translates to almost 60 customers per m^2 of total Gross Leasable Area (GLA) per year, with the majority of visits typically occurring in December), half a million more than the year before. Compared to 2015, shopping

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visits increased more and the average sales per customer increased by 3.1%. The average turnover of shopping centres also recorded an increase of 5.6% (CBRE, 2018) in the same period. On the other hand, a counter-current that advocates alternative ways of shopping and spending leisure time has recently arisen in many post-socialist cities, including cities in Slovakia (cf. Spilková, 2016).

Shopping centre developers and retail management are constantly responding to consumer demands. On the other hand, consumers adapt their shopping and leisure time habits to new possibilities and trends. According to Ng (2003), shopping centres have tailored themselves to become not only centres for shopping but also community centres for social and recreational activities, leisure time, entertainment or family meetings. Consumers visit shopping centres for a variety of reasons, resulting in shopping centres taking over the role of universal service facilities. One question is how different generations (e.g. teenagers and seniors, for example) perceive shopping centres (as places for shopping and/or spending leisure time), and are there any behavioural differences also reflected in these spaces.

Shopping, as much as spending leisure time in shopping centres, does not have a long history in Slovakia. During the socialist era there were no shopping centres in their present form (Kunc et al., 2013). Now, seventeen years have passed since the opening of the first shopping centre in Bratislava. Thus, this generation of teenagers was born in the era of shopping centres while the generation of seniors lived most of their lives without them. The question is whether these two generations of consumers perceive shopping centres in Bratislava differently or not. The perception of shopping centres affects the shopping process. Positive perceptions can lead to higher spending on shopping (Shim and Eastlick, 1998), and can express satisfaction with shopping at that centre. The more satisfied shoppers are with shopping centre attributes, the more time they are likely to spend in the centre, but similar relationships do not hold for money spent in the shopping centre (Stoel et al., 2004).

The shopping behaviour of the consumer varies according to their age (Kohijoki and Marjanen, 2013; Moschis, 2003; Myers and Lumbers, 2008; Parment, 2013; Solomon et al., 2012; Zniva and Weitzl, 2016). An important aspect of retailing studies on personal characteristics and shopping involves the predictive relationship between those characteristics and shopping time (McDonald, 1994). Sommer et al. (1992) showed a positive association between age and time spent in stores. Older people spent more time in the store and bought larger amounts than younger people. This paper was also focused on the frequency of visits for shopping (Sommer et al., 1992). Different respondent age groups are significantly associated with the frequency of visits to shopping centres. Younger consumers are supposed to visit more frequently than older ones (Pattanaik et al., 2017). Another study, however, points to a positive correlation between age and visit frequency, suggesting that older people visit shopping centres more frequently (Roy, 1994). Roy (1994) also obtained an adjusted correlation between income and visit frequency, which has a low but significant value.

Different age groups of consumers spend different shares of their finances for shopping. Elderly shoppers have been found to be more price-conscious than other cohorts (Burt and Gabbott, 1995). Comparisons among consumers across the lifespan, however, do not suggest that the elderly's level of price consciousness is necessarily much greater than that of other age groups (Smith, 1988). The social context of visits to shopping centres can be considered an important aspect of shopping centre assessment. Teenagers shop most often with friends or partners, as only ten percent of them shop independently. The social function of shopping is supported by the fact that teens like being with their friends while they shop. These results clearly confirm the social role of shopping (Tootelian and Gaedeke, 1992; Kunc and Dvořák, 2016).

The aim of this paper is to evaluate the shopping behaviour of teenagers in shopping centres in Bratislava (Slovakia) in comparison with seniors. Regarding the hypothesised differential shopping behaviour of teenagers and seniors, we seek answers to the following research questions (RQ):

- RQ1: Does the share of money spent vary depending on the perception of visits to shopping centres? Is there a presumption that the positive perception of shopping centres also increases the share of money spent in shopping centres?;
- RQ2: Are there significant differences in the share of money spent in shopping centres in relation to the frequency of visits to shopping centres?;
- RQ3: Is there an interaction between the perception of shopping centres and the frequency of visits to shopping centres?; and
- RQ4: Are there significant differences in the share of money spent in shopping centres in relation to the social context of visits to shopping centres?

We have formulated the following relevant null hypotheses (H0) for these research questions:

- H01: The share of money spent in shopping centres does not depend on the perception of shopping centres; the perception of shopping centres does not affect the share of money spent in shopping centres;
- H02: The frequency of visits to shopping centres does not affect the share of money spent in shopping centres;
- H03: There is no interaction between the frequency of visits to shopping centres and the perception of shopping centres; and
- H04: Differences in the mean values between individual social context responses will be zero, and thus there will be no difference between these groups.

In relation to the different shopping behaviours of teenagers and seniors in space, the aim is to answer the following research question: RQ5 – In which of the aspects (time, social, financial, etc.) of shopping behaviour and leisure time are teenagers and seniors different?

2. Theoretical background

2.1 Teenagers and their shopping preferences

The consumers of 'generation Y' represent the children of the generation of "baby boomers" or 'generation X' (Herbig et al., 1993). In this paper, teenagers are considered to be consumers aged between 14 and 19 years. Teenagers represent an interesting subject for retail researchers for at least three reasons (Arslan et al., 2010, pp. 178–179):

i. they are considered to be a strong group of shopping centre consumers;
ii. teenagers' interests in shopping centres (outside of the developed countries of Western Europe and North America) have become new public spaces; and
iii. teenagers are a specialised market segment for shopping centres.

Visits to shopping centres by teenagers are influenced by several factors (Arslan et al., 2010): the retail environment, its comfort and its conditions, socialisation and security, availability and leisure time. As a major factor in the shopping behaviours and in spending leisure time for teenagers, technological progress and adaptation to new trends in consumer society need to be mentioned. The current generation of teenagers is the most adapted with respect to new trends (especially, compared to seniors). Specifically, for young people or teens in connection with their shopping behaviour and habits in shopping malls, according to some authors, lesser attention has been paid both to Western societies (Massicotte, 2011) and post-socialist countries in Central and Eastern Europe (Spilková and Radová, 2011). Pyyry (2016) discusses the view that in current Western societies, 'hanging around' is considered to be a deviant act because it lacks a clear goal. Such behaviours in shopping centres are more or less tolerated, however, as such young people are viewed as future customers. Harris (2005) also points out that, for young middle-class girls, strolling in shopping centres is a rare opportunity to be "off leash", without the direct supervision of an adult. Pyyry (2016) adds that this playful way of "active doing nothing" actually creates space for the existence of teenagers (being-in-the-world), because the traipsing is often pleasantly purposeless, sometimes even boring but nevertheless allows interested persons to engage and react to the surrounding conditions and environment.

The professional literature has established the concept of mall enthusiasts as 'mall junkies', which means an almost morbid addiction to the leisurely spending of free time in the shopping centre, often without their own purchases, just trying to be at the centre of events and be seen by their peers. Visiting a shopping centre without a clear goal is not only the privilege of teenagers of the advanced Western world, but also in transforming post-socialist societies (e.g. Spilková and Radová, 2011, Kunc and Dvořák, 2016).

2.2 Seniors and their shopping preferences

In Europe, older populations are gradually becoming dominant, and it is therefore necessary to understand them (Thompson and Thompson, 2009). In the US, consumers aged 65+ are the richest of all age categories, with multiple sources of income (Pak and Kambil, 2006). As in other post-socialist countries of Central Europe (Káčerová et al., 2014), the population of Slovakia is also old. Over the last 100 years, the population aged 65+ has almost tripled (Káčerová et al., 2012). The age class of seniors will grow in the future and tackling the resulting diverse socio-economic challenges will not be a matter of choice but rather a necessity. Therefore, paying attention to the older generation can be considered relevant.

Old and aging consumers are often considered a relatively homogeneous group, members of which are similar to each other but significantly different from younger age groups (Kohijoki and Marjanen, 2013). On the other hand, it can be noted that people age differently and there are differences in attitudes, wits and behaviours among people of the same age. When we consider age as a segmentation criterion, Koudelka (2005) draws attention to the dangers which are associated with age-based stereotypes that are not reality-based and which are based on the assumption that a certain age corresponds to certain shopping behaviours.

Typical and very widespread stereotypes about seniors include, for example, that all seniors are the same; they do not buy news; they are senile; they only care about themselves – and so on. It is important, however, not to be subjected to these prejudices because the numbers of people who are different is rising among seniors (e.g. rock music lovers, the 'younger' seniors who have a positive approach to technical news, etc.). Another circumstance that disturbs age stereotypes is the psychological dimension of age that is psychological age: i.e. there is a difference between real age and how old you feel. There is an even more pronounced shift between real age and age perceived, i.e. seniors mentally get young. There are also differences in spending leisure time and shopping behaviour within one generation. The question is whether these differences are manifested in the area on which this particular contribution is primarily focused (Moschis, 2012).

The shopping behaviour of seniors is influenced by several factors, the most important of which is price. Seniors are among the most price-sensitive consumers. Other important factors include the quality of the products, products intended for seniors and a caring and friendly customer service (Lesáková, 2014). Given the limited mobility of seniors, access to the place of purchase and leisure time also play an important role. The quality of the interactional aspect of service delivery is of major importance to seniors because of the emphasis they place on social interaction and strong relationships with service providers. Thus, a senior customer may repeatedly visit a service provider, not merely for commercial benefits but also for the social and emotional advantages that accrue. This highlights the importance of employees' customer-oriented interpersonal skills in the seniors' evaluations of their service encounters (Grougiou and Pettigrew, 2011).

3. Data and methods

3.1 Data collection

Data for this study were collected using a questionnaire survey in April and May of 2017. The analysis was carried out using a sample of 504 teenagers and 431 seniors (see Tab. 1).

Shopping Centre	Teenagers		Seniors	
	absolute	relative (%)	absolute	relative (%)
Aupark	108	21.5	97	22.5
Avion Shopping Park	105	20.8	85	19.7
Bory Mall	88	17.5	83	19.3
Centrál	103	20.4	93	21.6
Eurovea	100	19.8	73	16.9
Total	**504**	**100.0**	**431**	**100.0**

Tab. 1: Number of respondents in the sampled shopping centres. Source: authors' research survey, 2017

The questionnaire research was conducted in five shopping centres (Tab. 1). The research design was quantitative in nature, with random selection of respondents in front of or directly inside the shopping centres. Research interviews were carried out by students in the relevant master's degree programs. The questions were mainly focused on perceptions of shopping centres, and the time, social and financial aspects of shopping behaviours.

In accord with relevant official sources, the survey reveals that the majority of visitors to shopping centres in Slovakia are women (http://www.marketlocator.sk), representing more than half of the respondents. Women prevailed both in the case of seniors (60.6%), as well as teenage respondents (56.7%). The mean age was 68.8 years for seniors and 17.0 years for teenagers. The dominant majority of teenagers are unemployed, student consumers, often without their own income (4.5%); on the other hand, one-tenth of seniors were employed.

3.2 Measurement and data analysis

To test the hypotheses, simple (one factor) Analysis of Variance (ANOVA) models for age group differences were estimated using SPSS (Gaur and Gaur, 2006). The analysed questions (dependent variables) were: Q1 – "How often do you visit shopping centres?" (with a choice of responses: Daily; Few times a week; Few times a month; Few times a year or less frequently; Never); Q2 – "How do you perceive shopping centres?" (with a choice of responses: Positive; Rather positive; Rather negative; Negative; No opinion); Q3 – "What share of your income do you spend in shopping centres per month?" (open question with an estimate in %); and Q4 – "Who do you usually visit shopping centres with?" (with a choice of answers: Alone; With a partner; With family members/parents; With friends/acquaintances; Other; and Never visit). Since we want to determine whether the frequency of visits to shopping centres and the perception of shopping centres (Q1 and Q2) affect the share of money spent in shopping centres (Q3 – quantitative variable), while assuming the relationship between the perception and the frequency of visits (ordinal variables), we have looked for answers to questions Q1, Q2, and Q3 by using the ANOVA model for two factors with an interaction term.

3.3 Visualisation

Geographical Information Systems (GIS) are an important part of geographic research, including retail and consumption research (Birkin et al., 2017). GIS was used to find answers to our fifth research question (RQ5). The methodological approach applied in this part of the work can be characterised in three steps: geocoding; concentric zone formation; and analysis of shopping behaviour in concentric zones.

3.4 Study area

The case study region was the city of Bratislava, which is the capital of Slovakia with the largest concentration of shopping centres (15). The first shopping centre in Slovakia was opened in Bratislava in 2001. It can be said that the trend in shopping and spending leisure time in shopping centres is determined by the capital city (Križan and Lauko, 2014).

In Bratislava, we focused on the definition of concentric zones with a radius of 500 metres. The consumer shopping behaviour database from Bratislava was organised by concentric zones as this represents a way to capture the spatial differentiation of changes in shopping behaviour and respective changes in the spatial structure of the city (see Šveda, 2011). We consider this segmentation with respect to the residence of respondents to be correct because the analysis would not make sense for smaller zones, considering the number of respondents, and larger zones would not capture certain specificities in space. Terminologically, it concerns people living in areas at some distance from shopping centres. We can assume that shopping behaviours change with increasing distance from the shopping centre. The 500 m range in the construction of the zones has proved to be the most suitable as it does not distort the area by a number of narrow or wide zones, while taking into account the character of the analysed phenomena at an intra-urban level. As the spatial distribution of the analysed sample of consumers is heterogeneous, we have merged concentric zones beyond 2,500 m from the analysed shopping centres. Beyond this border, it would not be possible to discern a representative sample of respondents for individual zones. Therefore, the remaining part of the city was not divided in a more detailed way but was analysed as one concentric zone (more than 2,500 m).

Due to the size of the population, the difficulty of data collection and the variability of urban retail in Bratislava, research efforts focused on five shopping centres (Aupark, Avion Shopping Park, Bory Mall, Centrál and Eurovea). In terms of their location, these cases are typical examples of busy shopping centres in the historic centre (edge-of-centre), out-of-centre and out-of-town (Križan et al., 2017). According to the GLA, these five are largest shopping centres in Bratislava, and according to recent research they are the most attractive (Kunc et al., 2016) and the most visited (Križan et al., 2015) centres.

4. Results

4.1 Testing the hypotheses

Table 2 shows the values for testing hypotheses on the sample of teenagers. The table demonstrates that:

Source	Sum of Squares	Df	Mean Square	F	Sig.
Model	924,195.728[a]	12	77,016.311	157.456	.000
Q1	20,786.408	3	6,928.803	14.166	.000
Q2	454.138	3	151.379	.309	.819
Q1 * Q2	3,181.912	5	636.382	1.301	.262
Error	212,282.272	434	489.130		
Total	**1,136,478.000**	**446**			

Tab. 2: Hypothesis testing for teenagers: Dependent Variable Q3: "What share of your income do you spend in shopping centres per month?" (estimate in %; [a]R Squared = .813 [Adjusted R Squared = .808])
Source: authors' research survey, 2017

i. while the overall model is significant ($p < 0.0001$), we cannot reject the H01 hypothesis at a probability level of 0.05 ($p = 0.819$), and therefore the perception of shopping centres does not affect the share of money spent in shopping centres (RQ1);

ii. we reject the H02 hypothesis at a level of 0.0001, and therefore the frequency of visits to shopping centres affects the share of money spent in shopping centres (RQ2); and

iii. we cannot reject the H03 hypothesis at the level of 0.05 ($p = 0.262$), which claims that there is no interaction between the frequency of visits to shopping centres and the perception of shopping centres.

Thus, there is evidence that there is a relationship between these two factors (RQ3).

When looking for answers to RQ4 in the case of teenagers, we tested the null hypothesis (H04) that the differences in the means between the social context responses will be zero, therefore that there would be no difference between these groups. We reject this hypothesis ($p = 0.018$): the means differ for the five basic groups (Q4) (see Tab. 3). The share of money spent in the case of teenagers depends on the social context.

In the case of seniors (see Tab. 4), it was demonstrated that:

i. the overall model is highly significant ($p < 0.0001$), and we reject the H01 hypothesis ($p = 0.024$), and therefore the perception of shopping centres affects the share of money spent in shopping centres (RQ1);

ii. we reject the H02 hypothesis ($p = 0.012$), and therefore the frequency of visits to shopping centres affects the share of money spent in shopping centres (RQ2); and

iii. we reject the H03 hypothesis, which tested that there is no interaction between the frequency of visits to shopping centres and the perception of shopping centres, at the probability level of 0.001.

Therefore, it was shown that there is a relationship between these two factors (RQ3).

When testing the H04 hypothesis in the case of seniors (see Tab. 5), it can be concluded that differences in the means of the social context responses (Q4) is not different from zero ($p = 0.263$). The share of money spent in shopping centres in the case of seniors thus does not depend on social context.

Hence, between the teenagers' and seniors' shopping behaviours, some significant differences were confirmed (Tab. 6).

It should also be noted that the overall explanatory power of the model for the teenager sample ($R2 = 0.808$) was considerably higher than for the seniors sample ($R2 = 0.138$), although they are both highly significant in a statistical sense, as indicated above.

4.2 Positive vs. negative perceptions of consumers of shopping centres

As a relatively new phenomenon in Slovak retail trade, shopping centres are perceived not only positively but also negatively. Both teenagers and seniors have a generally positive perception of shopping centres. A more pronounced proportion of positive and rather positive (83.9%) views were recorded for the teenagers. The seniors are more critical, and shopping centres are rated negative and even rather negative (19%). From a spatial point of view, there is partially apparent a more positive perception of shopping

Source	Sum of Squares	Df	Mean Square	F	Sig.
Between Groups	7,332.217	4	1,833.054	3.023	.018
Within Groups	281,943.111	465	606.329		
Total	**289,275.328**	**469**			

*Tab. 3: Hypothesis testing for teenagers (Q3 * Q4)*
Source: authors' research survey, 2017

Source	Sum of Squares	Df	Mean Square	F	Sig.
Model	3,856,297.025[a]	15	257,086.468	4.858	.000
Q1	590,048.202	3	196,682.734	3.716	.012
Q2	504,927.518	3	168,309.173	3.180	.024
Q1 * Q2	1,433,138.298	8	179,142.287	3.385	.001
Error	18,258,489.975	345	52,923.159		
Total	**22,114,787.000**	**360**			

Tab. 4: Hypothesis testing for seniors: Dependent Variable Q3: "What share of your income do you spend in shopping centres per month?" (estimate in %; [a]R Squared = .174 [Adjusted R Squared = .138])
Source: authors' research survey, 2017

Source	Sum of Squares	Df	Mean Square	F	Sig.
Between Groups	319,973.461	4	79,993.365	1.316	.263
Within Groups	25,781,350.684	424	60,805.072		
Total	**26,101,324.145**	**428**			

*Tab. 5: Hypothesis testing for seniors (Q3 * Q4)*
Source: authors' research survey, 2017

centres by teenagers living near to them (up to 1.0 km), with minimal values of negative perceptions (see Fig. 1). It is also necessary to draw attention to the fact that up to 10% of seniors do not have definite perceptions, they are neutral (in the case of teenagers this percentage is about one half).

4.3 The time aspect of visiting shopping centres

One of the tasks of researching shopping behaviour and spending leisure time at shopping centres is to assess the frequency of visits to shopping centres, which is influenced by a number of factors. Generally speaking, teenagers visit shopping centres for joy and amusement (leisure time) more often than seniors (see Fig. 2). Shopping for teenagers is exciting, interesting, and fun (Taylor and Cosenza, 2002), while the purchases of seniors are characterised rather as purposeful and rational (Grougiou and Pettigrew, 2011). This is why more than 45% of teenagers visit a shopping

Hypothesis	Teenagers	Seniors
H01	Accepted	Rejected
H02	Rejected	Rejected
H03	Accepted	Rejected
H04	Rejected	Accepted

Tab. 6: Summary of hypothesis testing
Source: authors' research survey, 2017

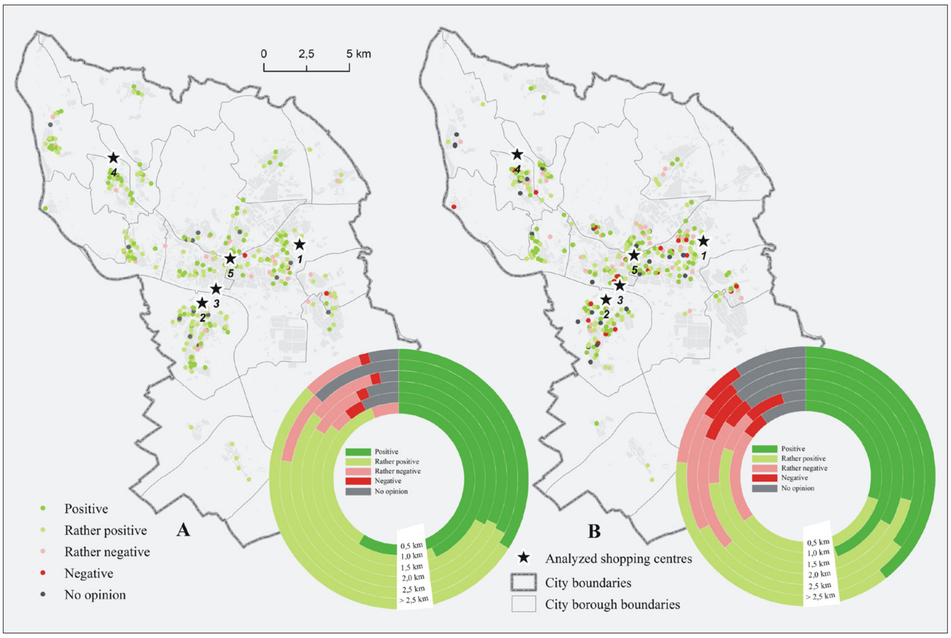

Fig. 1: Perceptions of shopping centres in Bratislava, by concentric zones (as of 2017)
Legend: A – teenagers, B – seniors; shopping centres = 1 – Avion Shopping Park; 2 – Aupark; 3 – Eurovea; 4 – Bory Mall; 5 – Centrál. Source: authors' research survey, 2017

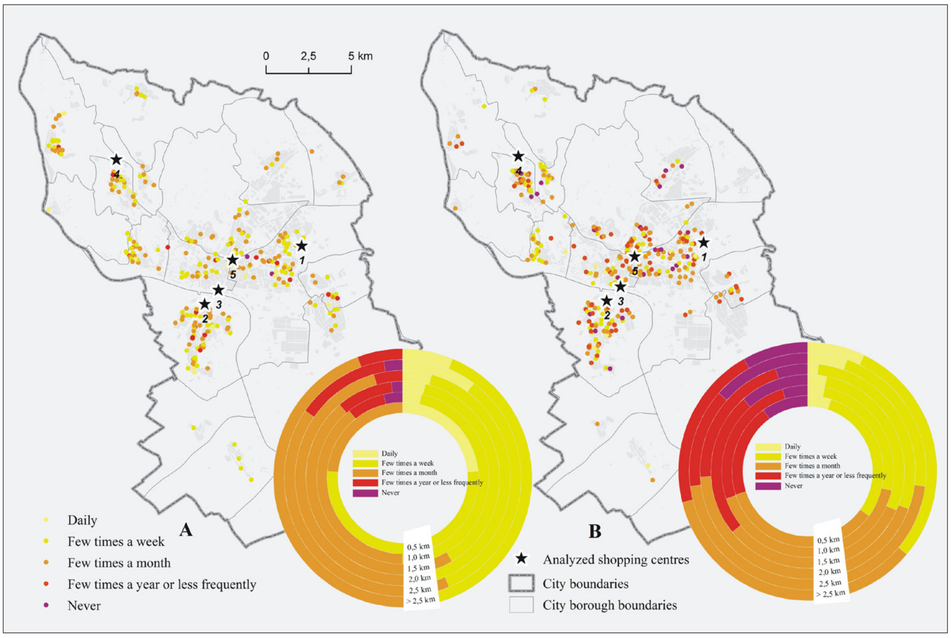

Fig. 2: Frequency of visiting shopping centres in Bratislava, by concentric zones (as of 2017)
Legend: A – teenagers, B – seniors; shopping centres = 1 – Avion Shopping Park; 2 – Aupark; 3 – Eurovea; 4 – Bory Mall; 5 – Centrál. Source: authors' research survey, 2017

centre daily or several times a week. On the part of seniors, it is less than one third. On the other hand, almost one quarter of seniors spend leisure time in shopping centres only a few times a year or less. From a spatial point of view, it appears that the frequency of visits to shopping centres for joy and amusement (leisure time) is not dependent on the distance both for teenagers and for seniors (Fig. 2). For the teenagers, however, there is an increased frequency of visits to shopping centres in the case of a concentric zone of up to 500 m, but this is not confirmed for seniors.

Based on the ANOVA test, the differences in time that teenagers and seniors spent in the shopping centres are statistically significant ($F = 13.503$; $p < 0.0001$): teenagers spend an average of 111 minutes and seniors less than 22% of the time (86 min) in the analysed shopping centres. For the teenagers, the smallest group spends up to 30 minutes of their time in shopping centres, but on the other hand, the smallest group of seniors spends an average time of more than 120 minutes. The group of teenagers living within 500 m of the shopping centre spends less time in shopping centres than teenagers living in remote locations. Conversely, for teenagers (but also seniors) living further from the shopping centre, there is a marked longer average visit time for shopping centres (see Fig. 3).

4.4 The social aspect of visiting shopping centres

An important element of shopping centre analysis can be the social aspect. Research suggests that group purchases lead to greater purchases and a larger spending of money (Sommer et al., 1992). The social aspect of shopping by teenagers can bring positive results for retailers (Mangleburg et al., 2004). In the case of the consumer groups analysed here, the different behaviour of teenagers and seniors have been demonstrated. The dominant social aspect for teenagers is to visit a shopping centre with friends/acquaintances (55.2%). It should be noted that shopping with a boyfriend/girlfriend, especially for young people, reduces the perceived risk and uncertainty that buyers associate with shopping decisions, and increases the buyer's confidence in making the right decision (Sommer et al., 1992).

On the other hand, due to age and overall social behaviour, seniors often visit the shopping centres by themselves, and shopping with friends and acquaintances was the least common response (see Tab. 7). With 95% confidence, the average response to the question about the social context of a shopping centre visit (Q4) in the case of teenagers would be the option 'With friends/acquaintances', while for seniors it would be the options of 'Alone' and 'With a partner'.

4.5 The financial aspect of shopping centre visits

A final important aspect of analysing shopping behaviour in shopping centres on the one hand and spending leisure time on the other hand, can be considered the financial aspect. The task of the respondents was to estimate how much revenue they spend in shopping centres per month. The term income in this question includes all the finances available to the consumer during the month. These are finances coming from jobs, brigade-work, pocket money, pensions or other activities. The financial aspect is one indicator where the perceptions of consumers of various generations are the most different. While the average share of monthly expenses spent in shopping centres is 43.1% of income for teenagers, for seniors a level of 17.6% was reported. It should be noted that the spending of seniors in shopping centres cannot reach the level of spending of teenagers in shopping centres, as they have other expenses (rent, food, etc.) that do not show up in the outlays of teenagers. From the spatial point of view, there is no apparent dependence between the share of spending in shopping centres and the place of residence of consumers (see Fig. 4). It can be said that the average share of monthly expenses in shopping centres from income (pocket) consumers is not differentiated in this space.

5. Discussion and conclusions

Given the complexity of the issues and factors affecting consumer shopping behaviour and leisure time, our results cannot simply be generalised. Several general research notes can be presented, however. Firstly, it should be emphasised that this is a case study from a single city, so the results may not be reproducible for other post-socialist cities. Based on our

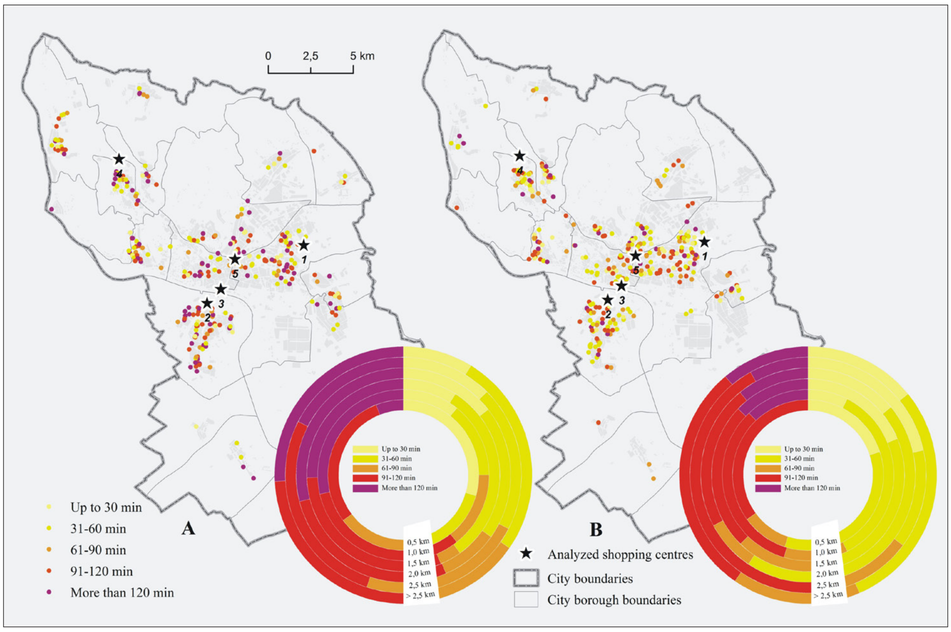

Fig. 3: Average time spent in shopping centres in Bratislava, by concentric zones (as of 2017)
Legend: A – teenagers, B – seniors; shopping centres = 1 – Avion Shopping Park; 2 – Aupark; 3 – Eurovea; 4 – Bory Mall; 5 – Centrál. Source: authors' research survey, 2017

experience and previous research, however, we can assert that the results can be generalised to similar large cities in Central East European countries, especially those with similar economic and social development, such as in the V4 countries (the member states of the Visegrad Group, including the Czech Republic, Hungary, Poland and Slovakia).

Shopping centres are becoming the new places for spending 'free time' for teenagers who, in this study, spent most of their time in Bratislava at clothing stores, which confirms the general trends for young consumers in shopping centres (cf. Spilková and Radová, 2011). Gilboa and Yavetz (2010) stated that seniors in shopping centres stay the shortest

Social groups[a]		Teenagers	Seniors	Total
Alone	Count	94	155	249
	Expected Count	133	116	249
	% within social groups	**38**	***62***	100
With partner	Count	62	135	197
	Expected Count	106	91	197
	% within social groups	**31**	***69***	100
With family / parents	Count	63	78	141
	Expected Count	76	65	141
	% within social groups	45	55	100
With friends / acquaintances	Count	274	60	334
	Expected Count	179	155	334
	% within social groups	***82***	**18**	100
Total	Count	493	428	921
	Expected Count	493	428	921
	% within social groups	54	46	100

Chi-Square Tests	Value	df	Asymptotic Sig. (2-sided)
Pearson Chi-Square	176.998[b]	3	.000
Likelihood Ratio	188.307	3	.000
Linear-by-Linear Association	136.781	1	.000
N of Valid Cases	921		

Tab. 7: The social aspect of visiting shopping centres
Notes: [a]Excludes categories 'Other' and 'Never visits a shopping centre' (6 of 927 respondents, i.e. 0.6%). Percentages indicated in bold are much less than expected given the marginal frequencies, percentages indicated in bold Italics are much greater than expected; [b]0 cells (0.0%) have expected count less than 5. The minimum expected count is 65.52.

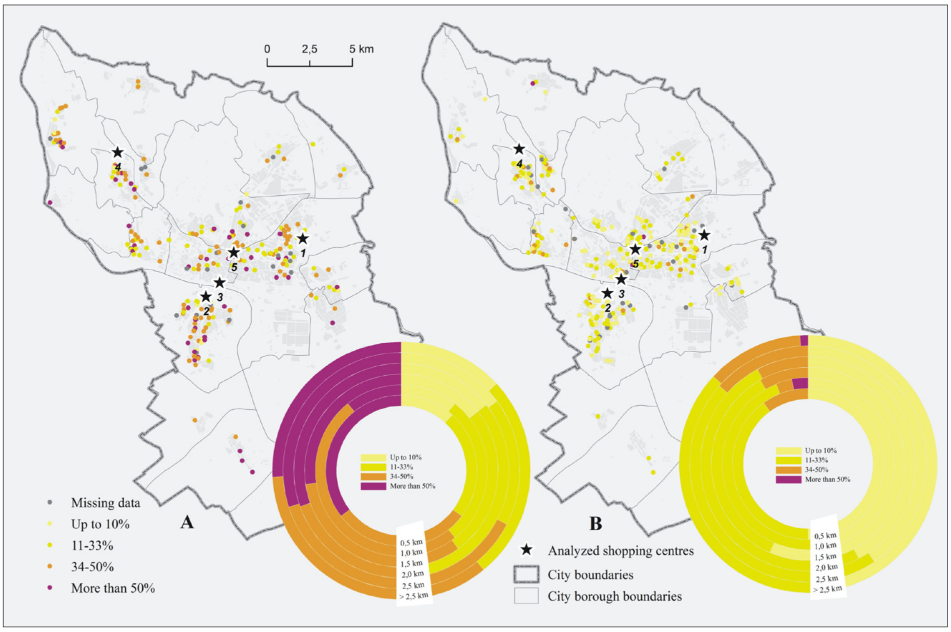

Fig. 4: Average share of monthly expenses spent in shopping centres, by concentric zones (as of 2017)
Legend: A – teenagers, B – seniors; shopping centres = 1 – Avion Shopping Park; 2 – Aupark; 3 – Eurovea; 4 – Bory Mall; 5 – Centrál. Source: authors' research survey, 2017

time, spend the least money, make fewer purchases and prefer non-branded products. Most of their trips to the mall are planned rather than spontaneous, they typically go accompanied by family members or friends, and they show a relatively high engagement in the mall's leisure activities, such as movies. As well, their comparatively high use of children's services, coupled with the fact that they often are accompanied by family, suggests that some members of this generation come to the mall to help with the grandchildren while parents go shopping.

When assessing the shopping behaviour and leisure time of seniors, it is necessary to realise that the current seniors have survived about half and even more of their lives under the socialist regime, thus in completely different socio-economic conditions. This may have some impact on their behaviour as consumers: e.g. a higher level of trust, or even credulity, which various speculators (such as street dealers, the case of the so-called schlockers, etc.) may abuse in a free market environment. Table 8 summarises the most significant findings from this analysis of shopping behaviour and leisure time in shopping centres in Bratislava.

Despite the short history of shopping centres in Bratislava (since 2001), consumers have adapted to the shopping trends in them (Križan et al., 2015). In general, positive perceptions of shopping centres can be noticed in teenagers, as well as in seniors. The positive perceptions of shopping centres in the case of teenagers do not result in an increase in the share of money spent there.

On the other hand, the perception of shopping centres and the share of money spent there were confirmed in the case of seniors (RQ1). The relationship between the frequency of visits to shopping centres and the share of money spent in them (RQ2) was confirmed in the case of Bratislava teenagers, as well as seniors. The interaction between the frequency of visits to shopping centres and the perception of shopping centres was only demonstrated in the case of seniors (RQ3). Most teenagers shop and spend leisure time at shopping centres with friends. On the contrary, seniors most often visit shopping centres on their own or with a partner. In this connection, we have analysed the share of money spent in shopping centres depending on the social context (RQ4). It has been confirmed that the share of money spent in shopping centres in the case

Generation of teenagers	**Generation of seniors**
Highly positive general perception of the shopping centre	Less positive general perception of the shopping centre
Higher frequency of visiting the shopping centre	Lower frequency of visiting the shopping centre
Longer time spent in shopping centres	Shorter time spent in shopping centres
Remarkably strong social aspects	Seniors as individuals
More money spent in shopping centres	Less money spent in shopping centres
Higher satisfaction with the general quality of shopping centres	Low prices preferred to the general quality of shopping centres
Positive rating of the range of goods offered	Criticism of the range of goods offered
Leisure time spent in shopping centres perceived positively (more fun)	Leisure time opportunities in shopping centres perceived as inappropriate for seniors

Tab. 8: Comparisons of the shopping behaviour and leisure time routines of teenagers and seniors in Bratislava shopping centres in 2017. Source: Interpretations from authors' research survey, 2017

of teenagers is strongly associated with the social context. On he contrary, such dependence has not been confirmed in the case of seniors. Differences between the teenagers and seniors behaviours in shopping centres appeared in some ambiguities in space (RQ5). It is a mosaic structure that is difficult to analyse and generalise, and requires a proposal for further research using different methodological approaches. For example, in future research it is possible that a different definition of concentric zones might represent differences in space more adequately.

While shopping centres are a part of consumption for teenagers since their birth, the shopping centres are a modern retail format for seniors. It turns out that Bratislava teenagers are not as sensitive consumers as seniors in the context of the variables assessed here. Teenagers perceive shopping centres as a normal part of their consumption. Seniors spend a greater share of money in shopping centres along with a positive perception of shopping centres. Also, in the case of seniors, the frequency of visits to shopping centres is increasing in the context of their positive perceptions.

The results of this analysis can be applied in the marketing strategies of shopping centres focused on their visitors. In this case, there is no fundamental aspect of economic development. Owners of shopping centres are becoming more and more aware that consumers' reactions to a rapidly changing retail environment will depend upon their preferences and the environment in which they are made (Kita et al., 2017). As stressed by Leszczyc et al. (2000), for the retailers as well as shopping centres, the problem is how to cope with increased competition in light of the dynamics of consumer shopping behaviour (see also Maryáš et al., 2014).

With respect to spending leisure time, it seems clear that it has a different character for different generations: as Thompson and Thompson stated (2009), it is difficult to empathise with people two generations older than you, after all, a 65-year old knows what it was like to be 30, but a 30-year old does not know what it is like to be 65. Therefore, a continuous assessment of the shopping behaviour of consumers of different generations can be considered a useful tool for marketing decision making.

Acknowledgements

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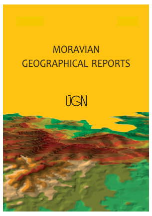

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Retail sprawl in post-Soviet urban residential communities: Case studies of Saint-Petersburg and Vilnius

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Abstract

Since the beginning of the 1990s, Soviet urban residential communities have experienced rapid inflows of new urban functions. In this research project, two post-Soviet urban areas – Vilnius and St. Petersburg – are examined to indicate contrasting development paths over the last 30 years. The term "retail sprawl" describes correctly one of the important processes which have reshaped the former socialist microdistricts. We used data from the years 1987–1989, the last years of the socialist economy, and 2016 for 36 comparable research areas. By 2016 the structure of these formerly monofunctional areas made them functionally very similar to that of the urban core, including them in the intra-urban circulation of goods and capital, redirecting flows and making the city centre's service burden much lighter. The results of the study provide a controversial contribution to the virtual discussion on universalism vs. uniqueness in post-socialist urban development. On the one hand, irrespective of contrasting "path-dependent" impacts, the structural results of retail development turned out to be generally identical in the studied cities at present, as well as in a prototypical North-American city 25 years ago. On the other hand, we found very pronounced differences compared to international patterns in morphological outcomes.

Keywords: *post-socialist cities; microrayons; retail sprawl; street retail; Saint-Petersburg; Vilnius; Russia; Lithuania*

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1. Introduction

Describing shifts in non-residential land uses in a Central-East European (CEE) post-socialist metropolis[1], K. Stanilov (2007b, p. 78) outlines in his most extensive study, two major spatial trends:

1. CBD-forming, the concentration of upscale retail, offices, etc.; and
2. the de-concentration of commercial functions.

Like other researchers (for example, Couch et al., 2007) Stanilov considers the latter trend to be of primary importance for the development of the city's outskirts, claiming that "de-concentration of office, retail and industrial uses has had a stronger impact on the spatial structure of the CEE metropolitan areas than the concurrent processes of residential de-concentration" (Stanilov, 2007b, p. 78). If the trend related to CBD-forming in post-Soviet cities has been described in some detail (see for example, Rudolph, 2001), the process of the de-concentration of commercial functions clearly lacks academic attention. This lack might indicate a gap since, during the last decade, one could witness something of a boom-type development of commercial (primarily retail) functions in the vast areas of the formerly exclusively residential high-rise "sleeping quarters", erected during the socialist period. Such areas, which host the majority of the population in many post-Soviet urban centres, experienced rapid inflows of new urban functions – primarily commercial – which not only interrupted their traditional monofunctionality but contributed to large-scale land-use and morphological shifts, a redirection of flows and reconfiguration of the metropolitan areas in general. This process is the main focus of the present research and we shall incorporate it into a much broader account of the urban sprawl phenomenon.

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[1] We use several terms in order to characterise our research area in space and time. The term CEE is used to indicate the broader geographical context of our field of interest. Among some other areas, it covers many post-socialist European areas, including Russia. We will attribute the term 'post-socialist' to them in describing the period from the end of 1980s – thus meaning by post-socialism purely a "spatio-temporal container" in the terms of Tuvikene (2016). The term 'post-Soviet' is prescribed here only to that part of the aforementioned CEE post-socialist territory which, before 1991, was an integral part of the USSR.

Apart from these general trends, we shall address the following research questions:

- To what extent has the socialist microrayon principle in former microdistrict areas been affected by the development of retail land uses?
- How did this process contribute to the redistribution of functions within urban areas in general?
- Could these trends be treated as uniform over post-Soviet space? and
- How do they fit into global trends of retail distribution within urban areas?

2. Theoretical background

2.1 Retail sprawl implications for post-Soviet cities [2]

The term "sprawl" has become popular not only in urban studies but also in public use for a long time. According to the Oxford English Dictionary, "sprawl" first appeared in print in this context in 1955, in an article in the London Times on 10 August, 1955: "London's great sprawl will inevitably engulf us sooner or later, no matter how many "green belts" are interposed in the meantime between the colossus and ourselves". Although a general understanding of the term "urban sprawl" is basically common, some variety in its use exists. While some exploit this term to define specific land use patterns (Couch et al., 2007), others apply it to socio-spatial shifts (Gu et al., 2015; Simion and Nistor, 2012). Since formal definitions of "urban sprawl" are quite numerous and vary in detail (for overviews, see for example: Bruegmann, 2005; Couch et al., 2007; Storper and Scott, 2016; Oueslati et al., 2015; Sarzynski et al., 2014), we tend to treat it rather as a general concept and shall outline attributes of it which are shared by many researchers. Thus, we understand urban sprawl as:

- A primarily centrifugal process of spatial expansion of certain urban functions to areas formerly not occupied by them (Couch et al., 2007);
- A process that covers peripheral (primarily but not exclusively suburban) zones of a city (European Environment Agency, 2006);
- A process that might be related to several urban functions: residential, commercial, etc.: such functions might expand relatively independently and not simultaneously (Nilsson et al., 2013);
- A process that withdraws urban functions which are highly or overly concentrated in the urban core and forms spatial patterns at the urban fringes, where these functions are distributed at much lower densities (Bruegmann, 2005); and
- A process which is market-driven and could hardly be planned or controlled in full – hence being self-governed and to a certain extent spontaneous (European Environment Agency, 2006).

Two aspects of the urban sprawl discourse are of greater importance for our research. First, the specificity of different types of urban sprawl that were made common by the usage of sub-concepts such as "residential sprawl", "retail sprawl" and even more specifically "industrial sprawl" (Couch et al., 2007; Nilsson et al., 2013), contextualise our approach. It is exactly the pronounced phenomenon of retail sprawl among such others, in the spatial expansion of retail activity that is the focus of our research.

Second, in this research project, we apply the urban sprawl concept to former Soviet urban residential communities, also referred to in the literature as large housing estates (LHE) (van Kempen et al., 2005; Wassenberg, 2013; Szafranska, 2013), microdistricts or microrayons (SNIP, 1994; Meuser and Zadorin, 2016). We shall discuss this matter in more detail below.

Unlike in the West, microdistricts became the major morphological form of development in the CEE cities' fringes after World War II. Research by Couch et al. determined that in the 1990s commercial development had a more significant impact on the transformation of outer city areas than housing construction (Couch et al., 2007). Simion and Nistor indicated that after the fall of the socialist regime, "retail centres were one of the first elements of new urban evolution of the city, being after followed by residential or office buildings" (Simion and Nistor, 2012, pp. 79–89). Other authors, using the case of Leipzig, demonstrated that retail sprawl started before residential sprawl: immediately after German reunification in 1990, a number of investors came to the city, developing land and constructing new buildings to explore business opportunities and take advantage of the new market (Nilsson et al., 2013).

The first effects of the collapse of socialist regimes for urban systems were investigated by Musil (1992). Shops and services were identified as one of the four urban actors in changing the urban environment, along with industry, house-owners and private households. The retail revolution in post-socialist Central Europe has been described in detail in several publications (e.g. Tsenkova and Nedovic-Budic, 2006; Nagy, 2001; Pojani, 2011). Mostly they have investigated a remarkably rapid shift in retailing, in which hypermarkets approached half of the retail market share within one decade. These authors found that retailing led urban decentralisation with residential and job sprawl. Institutional obstacles to retail development were identified by Maksic (2016), who stated that land policy reform was crucially important for retail projects in post-socialist cities.

Thus, these previous studies mostly deal with retail sprawl in the suburbs, barely touching the "commercialisation" of "sleeping quarters" erected during the socialist period.

In this study, we distinguish retail sprawl from retail de-concentration or decentralisation. Retail de-concentration is normally measured by the shares of retail allocated to the core (city centre) and periphery (urban fringes). This share may grow, reflecting the concentration process, fall (de-concentration) or grow again (re-concentration), following Dawson and Lord (2013). While "concentration–de-concentration–re-concentration" should be treated as a two-directional process, sprawl by definition is a single-directional one. According to our previous research, during the post-Soviet period spatial retail dynamics had in fact passed through the concentration (a growing share of the city centre), de-concentration (reduction in this share), and re-concentration (growing again) stages (Axenov et al., 2006, p. 158). At the same time, the density of retail functions in the housing areas (LHE) was constantly growing, making

[2] After Kent and Omar (2003), we assume that the retail industry consists of business activities related to selling goods and services to final consumers.

single directional retail sprawl change with higher or lower pace. This process has not resulted in shaping any real polycentric structure, since the city centre has retained its primary role and retail sprawl in LHE has proceeded rather evenly across all city fringes.

We believe that unlike de-concentration, sprawl should be measured by the density dynamics of a certain urban function (i.e. retail) within a certain territory (e.g. the LHEs) rather than by the comparative share of this very simple function in different zones of the city.

Stanilov has summarised the major positive and negative characteristics of post-socialist urban trends in CEE cities. Among the positive impacts, he includes the diversification of monofunctional areas, the revitalisation of some urban districts, increases in individual standards and choices, the diversification of market choices, the increase in shopping opportunities and personal mobility. We claim that all of these positive impacts could be attributed to the process which is the focus of our attention in this paper – the retail sprawl in socialist microrayon areas. With the same process, however, we can associate some features which Stanilov calls "negative": chaotic development patterns, the surge in illegal construction, the privatisation of the public realm, etc. (Stanilov, 2007a, p. 9). To some extent, retail sprawl might contribute to the problems of social stratification and increased congestion, as well as air and noise pollution. Even such a non-exhaustive list demonstrates the highly controversial impact that retail sprawl has had on the development of large-scale housing estates (LHE) and the post-socialist metropolis in general. Our approach prefers to demonstrate the outcomes of the spreading of non-residential functions (namely, retailing) to the peripheral socialist-era urban zones – which we call "retail sprawl"[3].

2.2 The concept of microrayon and its legacy

Rooted in the ideas of Clarence Perry, Le Corbusier and other Western urbanists and adopted in the USSR, the microdistrict (microrayon)[4] concept became one of the main urban planning principles and spread into many communist countries in the form of strict construction norms and regulations. Over several decades, in many countries, it became impossible to build housing in the largest cities in any other form than a microdistrict. Due to such regulations, almost all new residential areas erected after the Second World War in post-Soviet countries form huge massifs and similar-looking urban belts. Even today, residential areas in some countries are being built under the principles of the microrayon. This concept has survived several generations, in changes of political regimes and types of socio-economic relations.

The introduction of the microrayon concept was aimed at solving several problems at once:

- to fill in the gap of housing shortages in socialist cities recovering from the destructions of war and, at the same time, growing under industrial urbanisation processes;
- to do it as quickly and cheaply as possible;
- to serve the needs of growing industrial zones by concentrating the workforce in close vicinity to factories and institutions; and
- last but not least, to provide the Soviet working class with access to basic social and retail services (Fedchenko, 2012).

Implemented as an alternative to the "perimeter quarter" structure of an industrial city, the microrayon concept was used most appropriately to meet all of those challenges. Unlike "the perimeter quarter", a microdistrict was not shaped by blocking together perimeter structures of residential buildings with inner yards in the middle. Rather, it consisted of stand-alone linear bar-like buildings, in different orders filling the area between the roads (for a fuller understanding of the different types of microdistricts: see Meuser and Zadorin, 2016 or Dorofeev, 2014).

In its genesis, a "microdistrict" is similar to the American "neighbourhood", but it had inherent unique aspects from communist regimes (as a supplementary residential element to the major industrial and business zones of cities). According to uniform urban regulations throughout the USSR, the core of the microrayon planning principles aligned it with equal locational accessibility to major public and retail services. Thus, the rules from 1962 required that the microrayon should provide for its population an exhaustive set of public and retail services, namely: schools, kindergartens, retail trade, public catering, household services, social clubs, libraries, laundry services, garage spaces for personal vehicles, garbage disposal and parking grounds (SNIP, 1967). At later times, standards were further detailed and amended. For example, the 1989 rules provided that a microdistrict should average 10–60 hectares (but not exceeding 80) and should not be dissected by major streets and motorways (SNIP, 1994).

The main planning principle, however, remained – with restricting the physical accessibility to public and retail services – such that the location of these objects was the firm anchor which determined the allocation of all the surrounding housing. The same 1989 rules prescribed the allocation of all FMCG (Fast Moving Consumer Goods) deliveries (normally in the form of one supermarket, possibly combined with some repair or other service providers) not exceeding 500 m from any entrance door; with schools and kindergartens to be within 300–750 m, depending on the microdistrict type (SNIP, 1994). The same set of rules prescribed the allocation of facilities providing services of periodic and episodic demand. For example, sports centres – within 1,500 m, post offices and banks – within 500 m, etc. Thus, a four-tiered spatial structure of services accessibility should have been developed: a small microdistrict quarter (hosting only a kindergarten); a larger microdistrict (hosting 1–2 schools, supermarket and everyday services); an even larger district (hosting for instance, a small department store, cinema etc.); and the largest macro district or city (hosting a major department store, theatre etc.) (Gorlov, 2014; SNIP, 1994).

For this research topic, it is very important to stress that under the Soviet centralised state- owned planned economy, no other businesses in no other locations could have emerged – apart from what was prescribed by the set of rules mentioned above. The uniformity of these rules throughout

[3] Unlike in many capitalist countries where peripheral ('sleeping') low-density communities tend to exclude the retail economy, post-Socialist LHEs distinctly produce a demand for local retail inclusion. Indirectly this is shown by public actions against the demolition of temporary retail facilities, followed by claims to replace them with new permanent ones. This particular topic is beyond our focus here but could be the subject of future study.

[4] The Russian word "microrayon" is translated as microdistrict. Later we intend to use them as synonyms, using the transliteration of the Russian version rather to indicate the corresponding concept, and shall apply 'microdistricts' to its actual implication.

the former USSR has produced vast uniform, almost monofunctional residential areas of microdistricts with the same trade and service spatial organisation. The presence and especially the physical extent of these microdistrict area types is one of the most visible distinctions of a post-Soviet large city – from the Baltics to Central Asia (if not to say – from Albania to Siberia and the Russian Pacific coast: Murphy and Hourani, 2013, p. 24). A recent comparison of microdistricts in Eastern Europe and housing projects from the 1960s to the 1970s in Western Europe can be found in Monclus and Medina (2016).

2.3 The contemporary stage of retail development: Changing functions of microrayons

Several stages in retail spatial developments in Russian cities after socialism, using the case of St. Petersburg, have been outlined in Axenov et al. (2006) and Aksenov (2016). The first stages were attributed to what we called a 'process of spatial saturation with consumer goods and services'. These lasted until the end of the institutional transformation period at the beginning of the 2000s, and were responsible for the development of tens of thousands of temporary trade outlets such as kiosks, tents, open-air markets and pavilions. The last post-transformational stages are of crucial importance primarily for understanding the role of retail in changing the urban functions of microdistricts areas. Therefore they require some elaboration.

The stage which preceded the current situation was most pronounced from 2002 to 2007. It was the stage of the dominance of hypermarkets and large chain retailers. In 2007 in St. Petersburg, 66% of all purchases were made in hypermarkets, malls or from chain retailers (Bolshoi Server Nedvizhimosti, 2008). Unlike the situation in some Western cities, hypermarkets and malls occupied locations not only near motorways at the city's edge but rather near major public transportation nodes in the microdistrict areas. Kiosks, markets and pavilions which prevailed in retail spending in the previous stages (60% of purchases in St. Petersburg in 1997), retreated but were present primarily in the form of illegal stalls and tents (Komsomolskaya Pravda – Sankt-Peterburg, 1997).

During the last decade, shopping behaviour has changed dramatically again. In the present stage (2008–2016), instead of going for FMCG shopping in a hypermarket once a week by car, the majority of city dwellers started to prefer shopping 2–3 times a week in smaller shops located within walking distance from their home. Although the amount spent in the large retailers remained very high, many of them switched to a chain convenience store format to meet the new demand. Small- and medium-sized businesses contributed to this trend as well, which included, inter alia, bringing the popular "shop-in-shop" retail format into existence. The majority of such convenience type establishments flooded formerly monofunctional residential microdistrict areas. Thousands of them were built in the former flats on the ground floors of the Soviet era residential apartment blocks. Kiosk type set-ups moved from the transportation nodes deeper into the residential quarters as well (Aksenov, 2016)[5].

We believe that these stages are not unique to St. Petersburg, but rather represent some universal processes going on almost concurrently in CEE cities. For the capitals of the Baltic states, similar processes were described in Standl (1999, 2002) and especially for Vilnius in Standl (2003). In an already-cited publication, Stanilov (2007b, p. 89) described several stages of retail development on the outskirts of CEE cities which look quite similar to those described above. For example, he identified the early trend of filling in the Soviet-era neighbourhoods with small-scale commercial activities in the 1990s, as a "survival strategy". The second phase, attributed by Stanilov to the late 1990s through the early 2000s, he described as the large-scale, primarily foreign investments coming to the CEE urban retail market and inserting macro-establishments on the outskirts. This is obviously the stage mentioned above which was pronounced in St. Petersburg somewhat later during 2002–2007. Stanilov also outlined the beginning of a new stage based on the growing importance of next-door retail facilities (Stanilov, 2007b, p. 90). This is the latest phase which we have described as well, and it is the focus of our research interests here.

3. Methods and data

3.1 Research objectives

Studies of the origin and mechanisms of post-socialist urban change have resulted in the implementation of several theoretical and methodological approaches (see, for example, Sýkora, 2009; Sýkora and Bouzarovski, 2012; Hamilton et al., 2005; Tsenkova and Nedovic-Budic, 2006; Borén and Gentile, 2007; Stanilov, 2007a). One of the most general discussions on the outcomes of post-socialist transformation in general and on urban development in particular, has led to a virtual crystallisation of two development trajectories, which may be mutually contained or mutually exclusive. The first one tends to treat post-socialist transformation as a sort of 'catching-up' development to the more or less uniform modernisation trend (universalism). According to the second trajectory, the extent of the specificity of post-socialist legacies leads to valued different outcomes from that of the "global" modernisation trends, which are not uniform in different post-socialist societies (uniqueness). For in-depth discussions of this discourse in post-socialist urban studies, see for example Stryjakiewicz et al. (2008), Wiest (2012) and Bernt (2016).

Thus, our more general objective has the goal of contributing to this discussion. Regarding our topic, several points make this contribution potentially highly controversial. First, we are focused on the processes of restructuring one of the most specific Soviet urban legacies – vast microdistrict areas. Second, the specific retail developments in the former socialist urban outskirts may lie not only with the specific architectural material structure of microdistricts, but with the strikingly different (from that in the West) starting point – the severe shortages in the Soviet period of retail supplies and retail delivery locations. So, on the one hand, we have vivid specificity both of the research object (socialist microdistricts) and the subject (post-Soviet retail market saturation). But, on the other hand, urban retail sprawl is a quite general process which is experienced by many cities in the world. Moreover, market-driven city economies have quite common rules which dictate certain requisites for retail urban spatial development. So, what is the result of simultaneously combining the unique and the universal in retail sprawl in post-Soviet microdistricts?

[5] For visualisation of this process see Axenov, 2017.

We believe that one of the possible ways to answer this question is to compare examples of post-Soviet cities which have passed through quite different "paths" during the last 25 years. If the results of such a comparison turn out to be more different than similar, we might then conceptualise them as showing the prevalence of path-dependency; if not, then the universalists could possibly add this evidence to their arguments.

To accomplish this task we had to choose cases which:

- had a comparable starting position, i.e. being Soviet cities hosting all major types of microdistricts built in the period late 1950–1980s;
- preferably ranked highly in the Soviet hierarchy of its retail distribution system and hence were among the leaders in Soviet urban retail development; and
- have passed through the most contrasting "paths" after socialism.

With no doubt, one developmental extreme in such "paths" could be found among the major cities of the three Baltic EU member states which were former members of the USSR. The largest city and at the same time the present leader in retail development among the three Baltic states is Vilnius, the capital city of Lithuania. A contrasting developmental "path" may be found in one of the major Russian cities which experienced quite different economic and political regulation during the post-socialist period. Among Russian metropolitan areas, Leningrad - St. Petersburg has now become the leader in retail development, while during Soviet times it was at the same rank as Vilnius in the Soviet centralised retail supply distribution system (for details, see Aksenov, 2016). At the same time, both Vilnius and St. Petersburg might represent universalist trends in retail and urban development in the Baltic states and Russia respectively (see Standl, 2003; Axenov, 2017). The presence of research expertise on both of the above-mentioned cities became the last but not the least, factor for choosing Vilnius and St. Petersburg as research case studies for this comparison. The present study thus focuses on comparative parameters of the retail sprawl process in contrasting post-socialist cities. The forces that shaped the retail development and its landscape are discussed further in Aksenov (2016), Axenov (2017), Axenov et al. (2006).

3.2 Field study and data

For the analysis of retail sprawl, we used data for both cities for the years 1987–1989 (for Vilnius and St. Petersburg, respectively), i.e. the last years of the socialist economy, and 2016. Data on the territorial structure of trade in the period 1987–1989 were retrieved from the respective telephone books of Vilnius and St. Petersburg (Leningrad, at that time) and mapped. In order to assess current conditions, we carried out a field study in June 2016. Geography students of St. Petersburg State University and Vilnius University were involved in data collection. For the field work, we selected a comparable 18 research case study areas in St. Petersburg and 18 in Vilnius. For proper comparison, all 18 research areas in St. Petersburg were chosen within a centre-periphery segment, with generally the same population and comparable morphology to Vilnius as a whole. St. Petersburg has a radial-ring structure and for the 500K-resident segment (Vyborgsky rayon) that was chosen, it stretched from the centre to the north of the city with all types of residential buildings represented. Vyborgsky rayon has a unified transportation system for connection with the centre of the city (one metro line) and is morphologically separated from the other parts of the city. So, we based our research on comparable populations (500K) and number of case polygons (18).

The area of the 36 polygons was mapped. All street format (small size; separate deliveries) commercial objects[6] were photographed and classified according to several criteria including types of demand, e.g. daily, periodic and episodic. The latter classification was used by Soviet planners and underlies the actual allocation of deliveries at the starting point of the period we studied. The actual frequency of visits today to objects was investigated by Aksenov (2016), who confirmed the possibility of separating not only goods but also types of retail objects according to the frequency of demand. For the purposes of this study, we used the classification of retail objects according to the primary type of product in the assortment. A special sociological survey was not conducted, and the division by types of demand was carried out on the basis of the authors' expert assessments of the potential frequency of demand (relevance) for a particular type of goods (services). All forms of mobile commerce were also mapped: pavilions, kiosks, van shops, tents/covered trays, as well as trays/ sellers without tray. All of this information provided the basis for further analysis. Figure 1 illustrates the current morphology of two sample locations.

4. Results: Comparative dynamics of retail sprawl

The results of our survey reveal several important and quite unexpected facts (see Tab. 1). Firstly, the overall number of different retail and "street format" B2B (business to business) branches in microdistrict areas in 2016 was unexpectedly high – more than 50 in each city, which by several times exceeds that of the period 1987–1989. Such numbers obviously indicate the emergence in former socialist "sleeping quarters", of a highly diversified retail economy covering the majority of retail demand types (see Fig. 2, below). The number of business facilities increased almost 20-fold in St. Petersburg and by at least several times in Vilnius. All of this indicates strongly the saturation of formerly almost exclusively monofunctional residential urban areas, with the new commercial functions. Secondly, and an even more unexpected fact – the structure of retail branches in the two post-Soviet cities according to the type of demand (i.e. daily-periodic-episodic) in 2016 was almost identical. Since our research case study areas have developed in different countries and under different political-economic paradigms, for a quarter of a century, this must indicate some commonality for the post-Soviet space character of such urban trends. Third, in both cases, the retail activity serving periodic and episodic demand in 2016 by far outnumbered FMCG retailing – both by the variety of branches (which is quite understandable) and by the number of facilities. The last important and not so obvious fact is that in 2016 there was a widespread use of mobile retail facilities of different locational and constructive types in both cities. The extent of this phenomenon obviously relates to the legacy of post-socialist transformation and shows some of the specificity of post-Soviet urban development. Since the scale of trade

[6] We also mapped street format B2B (business to business) facilities because they compete for the same locations and real estate with retail.

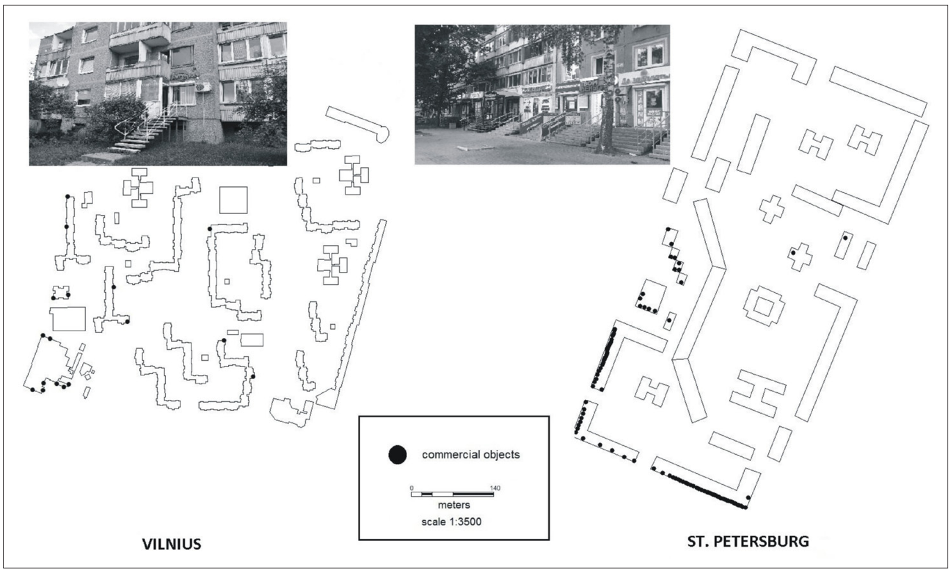

Fig. 1: Samples of one of the research case study areas in each city (microdistrict quarters)
Source: authors' 2016 survey

Type of facilities	St. Petersburg, 1989		St. Petersburg, 2016		Vilnius, 1987 [5 most comparable polygons][c]		Vilnius, 2016 [all polygons]	
	branches	facilities	branches	facilities	branches	facilities	branches	facilities
Permanent, B2C, daily demand	2	28	7	305	2	4	7	9
Permanent, B2C, periodic demand	8	34	25	663	12	13	24	227
Permanent, B2C, episodic demand	3	4	20	130	0	0	16	74
Permanent, mixed or n/a[a]	0	0	n/a	97	0	0	n/a	39
Permanent, B2B[b]	0	0	8	46	0	0	7	30
Permanent: Total	**13**	**66**	**60**	**1,241**	**14**	**17**	**54**	**439**
Mobile retail facilities, incl.	n/a	n/a	n/a	341	1	1	n/a	80
Standing alone	n/a	n/a	n/a	228	1	1	n/a	62
Within agglomerations	n/a	n/a	n/a	113	0	0	n/a	18
Permanent and mobile: Total	**n/a**	**n/a**	**n/a**	**1,582**	**15**	**18**	**n/a**	**519**

Tab. 1: Retail structure in microdistricts of St. Petersburg and Vilnius during Soviet times and the present (for 36 case study areas). Source of data: St.Petersburg 1989 and Vilnius 1987 –authors' calculations on the basis of respective phone books data; St.Petersburg 2016 and Vilnius 2016 – data based on the authors' field research
Notes: [a] mixed or n/a – predominantly facilities exposed for sale/rent or shop-in-shop type facilities; [b] only "street format" B2B facilities were registered, i.e. small size, with their own entrance from the street; [c] These polygons experienced minimal intrusion of post-socialist residential development, like all the studied areas in St. Petersburg, and hence we consider them as the most comparable ones between the two cities. In all the rest of the study areas in Vilnius, much of the housing has been built after 1991. But since the morphology of these polygons is very similar to socialist era microdistricts, we considered it appropriate to include them in the comparison.

in mobile retail facilities all over the post-Soviet territory compared to Western cities, is incomparably high (see for example, Axenov et al., 2006; Axenov, 2017), we tend to treat it as an important and uniform indicator of a path-dependency trend.

Since retail facilities serving all types of demand are represented in contemporary microdistricts, one may conclude that they should look for clientele at different spatial scales: some branches (e.g. next-door grocery stores) target clients from one quarter only, others (e.g. cafes) – from several quarters (i.e a microdistrict), a district (e.g. department stores) or, possibly, even several districts (e.g. concert halls). The locational priorities of such different branches cannot help but differ, specifically the locational preferences of B2B facilities. As already indicated, we registered only "street format" offices, which competed with B2C (business to consumer) retail establishments for location. In comparison with the city in general, the number of B2B branches in microrayon areas was rather limited: 7–8 in the studied cities.

So, what branches in business services tend to choose such locations and what are their objectives in such a choice? The global post-industrial trend of dispersal of office activity from city centres could obviously not be the main reason for the emergence of only a few small size "street format" offices in the former "sleeping" quarters of Soviet microrayons. Such global trends rather contribute to the dispersal of larger office centres serving businesses which are basically

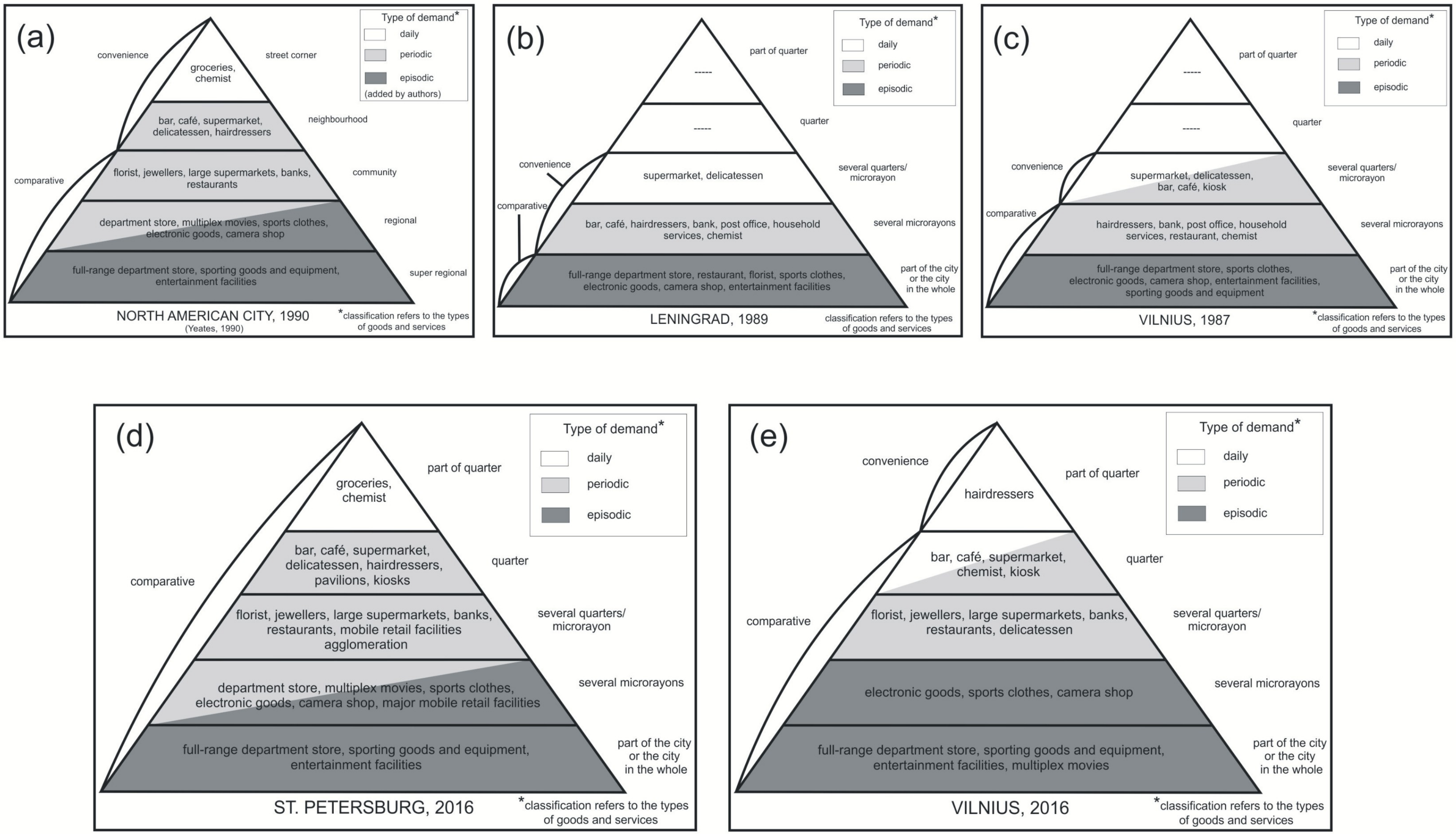

Fig. 2: Comparative hierarchy of commercial nucleations: a) compiled by the authors from (Yeates, 1990, p. 245) with added 'Type of demand'; b) and c) authors' calculations on the basis of the respective telephone book data; d) and e) authors' calculations based on data from the 2016 field study

indifferent to micro-location within a certain city and whose clientele is located in the broader markets. The composition of B2B branches represented by the small facilities in our case study research areas indicates that they rather target customers out of local business, and they offer the most needed business services to emerging businesses. Most B2B facilities cannot serve big businesses very effectively[7]. If this is true and local B2B activity here targets primarily the newly-emerged local retail business customers, then it means that the extent of these local retail operations is substantial enough for the survival of B2B services.

Several conclusions can be made thus far. First, we may state that the microrayon principle of retail organisation in former microdistricts has been completely destroyed by the introduction of market forces. Second, the residential (plus social services) monofunctionality of these urban areas has been broken by the intrusion of numerous retail activities. Third, this retail activity includes far more than the local FMCG provisions, including a vast range of branches of periodic and even episodic demand which formerly had been located almost exclusively in the city centre (for 1989 data: see for example Axenov et al., 2006). Fourth, the scale of retail activity in Soviet microdistricts became so extensive that it contributed to the redistribution of functions within the urban area in general, not only dispersing retail activity to the outskirts, but even taking away B2B functions from the city centre and thus breaking down its exclusivity there as well.

During the final days of socialism in the USSR, considered as the starting point for our analysis, Yeates (1990, p. 245) outlined the principles of retail facilities allocation in the North American city using a simple graph (see Fig. 2a). For comparison, we took Yeates' model and applied it to both of our cases, first trying to show the state of retail development in Soviet St. Petersburg's (Leningrad's at that time) and Vilnius' microdistricts in the late 1980s, and then versus what it is today. In Figures 2a–2e, we have purposely depicted only those types of facilities which were used by Yeates (1990), adding to them a few of those which we consider indicative and specific for our cases, attributing them to the respective scale where they were pronounced.

As this comparison shows, by the end of socialism in 1990, the retail distribution patterns both in Leningrad's and Vilnius' microdistricts had very pronounced differences to those of a typical North-American city. In comparison with Yeates' model, the upper hierarchical levels were not served by any retail facilities at all in both Soviet cities. This means at minimum that daily goods and services deliveries in Soviet-era microdistricts were much less numerous and were much sparser than that in a typical North American city. Comparison shopping started at much longer distances from the consumer's home as well. Considering the presumably higher population densities in Soviet microdistricts, this difference looks even more striking.

By 2016 the patterns in post-Soviet microdistricts have changed dramatically. They began to match the Yeates pattern almost entirely. Any differences between St. Petersburg and Vilnius became almost absent as well. The differences between the contemporary retail spatial organisation in the microdistricts of the two post-Soviet cities and the 25 years-old North American pattern resulted primarily from morphology – in the physical structures used for retail activities. Apart from the previously-mentioned former ground floor flats refurbished for retail use (especially in St. Petersburg), both post-socialist cities' microdistricts hosted numerous mobile facilities of different sorts (see Tab. 1). Urban morphology contributed to differences in density and allocation principles of retail facilities in the microdistricts built in different times and under different morphological and architectural standards. So, in the first microdistricts built in the period from the late 1950s to the early 1960s, the density of retail facilities is the lowest among all types of microdictricts[8]. Their morphology is less accommodating to retail development due to minimal pedestrian and automobile logistics within these quarters.

5. Conclusions

Our findings on retail and street format business development in post-Soviet St. Petersburg and Vilnius confirm that this process resembles what is normally described as retail sprawl. If we use the description of this term mentioned at the beginning of the paper, we can state that in both cities, microdistrict areas experienced a primarily centrifugal process of spatial expansion of retail and street format business into the areas formerly almost totally unoccupied by them. The number of business facilities there grew by up to 20 times, with the number of branches growing by an order of 5. The process of retail sprawl covered the peripheral zones of the two cities where microdistricts are located. A very slow rate of suburbanisation (especially in the case of St. Petersburg) makes vast microdistrict areas even more "peripheral". Retail sprawl as used here related to one specific urban function, namely commercial businesses. Residential functions expanded in these areas almost independently during Soviet times, and only decades later did commercial functions flood them. This process has reduced some commercial functions in the urban core as the majority of branches which are spread to the microdistricts today, were formerly represented only in the city centre. The spatial patterns of such branches are much more sparse at the urban fringes (Axenov et al., 2006). Retail sprawl was a market-driven process and to a certain extent, spontaneous. The best evidence for this statement lies in the fact that the result of this process indicated that structurally and locationally the patterns were almost identical in these two cities, which for a quarter of a century had developed under different political and economic paradigms.

This leads to the conclusion that the term "retail sprawl" does accurately describe one of the important processes which have reshaped the former socialist microdistricts. As hypothesised at the outset, the social (and urban) consequences of this type of sprawl are obviously not only negative. In fact, the changed structure of these formerly monofunctional areas has made them functionally very close to the urban core, including them into the intra-urban circulation of goods and capital, redirecting flows and making the city centre's service burden much lighter. They have started to contribute to the city economy, shaping new labour, commercial and locational markets which did not exist before.

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[7] Among B2B branches, we registered services in investment and finance, legal and marketing services, corporate identity and branding, brokerage, security and guards, office and business equipment trade.

[8] This trend is more pronounced in St. Petersburg where microdistricts built in different periods are territorially separated, as opposed to more mixed in the construction composition of microdistricts in Vilnius.

The results of our study also provide a controversial contribution to the on-going discussion on universalism vs. uniqueness in post-socialist urban development. On the one hand, the conclusion seems quite clear. We have compared the two contrasting post-socialist "paths" of St. Petersburg and Vilnius, and the results show basically the same patterns shaped by the processes studied. This means that, irrespective of regulation differences and other "path-dependent" impacts, the result was generally identical. Additionally, we have studied the development of universal market processes on rather unique post-Soviet research areas, that of vast microdistrict urban areas. We compared our results with a 25-year old model North American case and found almost total verification for both of our cases. This cannot help but provide supporting evidence to universalists and for those proponents of the 'catching-up' approach to post-socialist urban studies.

On the other hand, we also found some very pronounced differences to international patterns in morphological outcomes – urban forms and physical structures there were quite different from other cities in the world. These features concern the presence of numerous mobile facilities and their agglomerations, as well as specific forms of conversion of former residential real estate properties into commercial ones.

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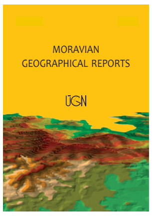

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Retail format competition: The case of grocery discount stores and why they haven't conquered the Chinese market (yet)

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Abstract

The international expansion of the German discounters Aldi and Lidl in recent years has been a large success in grocery retailing. In China, the world's largest grocery retail market, however, grocery discounters have not (yet) established a physical store presence. In 2017 Aldi Süd and Lidl for the first time entered a new market without the help of a physical store, implementing an online shop in China. As to the format's future, significant disagreement amongst retail experts exists. This paper, which is based on qualitative interviews with high-ranking senior executives of international retailers, argues for three major reasons as to why the discount format has not hitherto gained a foothold in the Chinese market. Firstly, due to the characteristics and challenges of China's market, such as high fragmentation as well as the need for strong localisation, a high standardisation of the format is not possible. Secondly, the extremely low-margin operation of discounters faces a price level in China that is already very low, limiting one of the discounter's major competitive advantages. Thirdly, the discount format is facing a lack of consumer acceptance, toughening the establishment of private brands, which represents one of the major characteristics of the discount format.

Keywords: *discount, grocery retail, format competition, internationalisation, Aldi, China*

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1. Introduction

While the internationalisation of the retail industry is not a new phenomenon, the breadth and speed of its expansion into new markets in the last decade is unprecedented (Dawson and Mukoyama, 2014, p. 227). Even so, the internationalisation process of retailers is not always successful. On the contrary, grocery retailers frequently report major difficulties in realising the potential offered by entering new markets. Very often, the format's market share remains relatively small compared to the host countries. In some cases, companies concede their ultimate failure, having to leave the market entirely. This phenomenon has created a large body of academic literature discussing international retail divestments (Burt et al., 2004; Palmer, 2004; Alexander et al., 2005; Coe et al., 2017).

Misjudgment of markets can lead to unwanted consequences, demonstrated by several prominent examples: Walmart in Germany (Christopherson, 2007) and South-Korea (Halpete et al., 2008); Ahold in Latin America (Wrigley and Currah, 2003); Ahold (Palmer and Quinn, 2007) and Park and Shop in China (Goldman, 2000); Marks & Spencer in Canada (Alexander, 1997, p. 286), in the USA (Burt et al., 2002) and Germany (Alexander and Quinn, 2002, pp. 119–120); Walmart and Carrefour in Korea (Young-Sang, 2011, p. 13); or Tesco's 'Fresh & Easy' in the USA (Euromonitor, 2013). Nevertheless, the internationalisation of retailers is continuing to increase, while especially the discounters' internationalisation strategies prove to be outstandingly successful. Apart from one example, namely Aldi Süd withdrawing from the Greek market in 2010 (Handelsblatt, 2010), the internationalisation process of discounters seems inexorable, with Aldi and Lidl stirring up markets in the UK, Australia and the USA, taking away big shares of long-established domestic players, such as Tesco, Woolworths and Coles.

Forecasts show that by 2020, Aldi will have even overtaken Carrefour in the European Ranking to take second place behind undisputed market leader Schwarz Group (Lidl, Kaufland) (Lebensmittelzeitung, 2017). The discounters gain share through their low-price structure and extensive range of private label products, forcing supermarkets and other industry players to reduce the cost of everyday items to compete. In 2003, Colla pointed out that the winners in the race to international expansion are the leaders of German hard discount retailers. One of the German companies that ventured relatively early abroad is

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the food discounter Aldi. Aldi Süd has had its own branches in the United States since 1976, making it one of Germany's pioneers in the American market. As Acker (2010) reveals, in her study of Aldi's expansion into the United States, the format has been transferred (almost) unchanged and it clearly differentiates itself from the local competition.

Traill (2006, p. 163) investigated the rapid global rise of supermarkets and suggests that significant growth occurs in countries opening-up their markets and increasing their gross domestic product – both present factors within the Chinese market. Despite the discount model's global growth success story, however, the Chinese market, the largest grocery retail market in the world, has no typical grocery discount store in operation.

China's retail sector has experienced tremendous changes in the past few decades. Operating as a planned economy with most of the industries, including retailing, monopolised by state government until the 1980s, the Chinese Retail Revolution started to evolve in the early 1990s. Hardaker (2017), however, suggests that a consecutive process of format development is only apparent to a very limited degree within the Chinese market, as it has witnessed the entrance of modern store formats, rather than experienced a domestic development from within. Several formats have been introduced within a short period of time, enabling a simultaneous rather than consecutive development. Foreign retailers have brought with them new formats, predominantly the hypermarket format in the start-up phase, thereby initiating a dramatic alteration of the Chinese retailing landscape. While infrastructural problems were paramount in the 1990s, fierce competition and rising rental as well as labour costs, present the main challenges for the Chinese retailing sector at present.

This paper seeks to discover the specific reasons as to why no discount operator has yet entered the Chinese market with physical stores. Section 2 presents the theoretical background: the competition between formats is discussed in more detail, before the method is revealed in the following section. The paper is based on a wide range of expert interviews, among them leading international and Chinese grocery retailers, as well as several on-site observations of a wide range of existing retailers across China. Subsequently, the main results are discussed, which include several essential factors that account for the absence of the typical grocery discount format in China. The findings extend prior research by providing more comprehensive qualitative evidence regarding the challenges faced by international grocery discount retailers and the influences upon them. Finally, the article concludes by outlining a brief research agenda for work on format development and grocery discount stores in China.

2. Theoretical background

2.1 Competition of retailing formats

Understanding the nature of competition among grocery retailers is an important and active area of inquiry for both researchers and practitioners in retailing and has been a frequently- visited theme of research (Graff, 2006; Jing, 2013, p. 147). It is argued that "[c]ompetition in the retailing industry has reached dramatic dimensions" (Popkowski et al., 2000, p. 323), while Galvin et al. (2010) claim that China has become "the world's most important competitive battlefield." Two main types of competition can be distinguished: firstly, 'between-format competition', such as for instance between discount stores and hypermarkets, or superstores and traditional wet markets; and secondly, 'within-format competition', between retailers of the same format who are competing for customers and market share respectively (Fox and Sethuraman, 2006, p. 194).

While it is expected that geographical and economic segmentation in modern retail chain adoption rates is relevant, further factors regarding consumers are often overlooked. Consumption habits, mode of food preparation and shopping habits are essential elements when deciding to shop within a certain retailing format. Goldman et al. (2002, p. 82) suitably describe the adoption of modern retail formats as taking place more rapidly by wealthier consumers because of access to better transport facilities and the time saving benefits of the one-stop shopping experience. The difficulties arising from attempts to simply categorise customers according to socio-demographic background are demonstrated by proven examples such as Aldi in Germany. Observations confirm the ambiguity of the customer base, often referred to as hybrid buying and justifying the expression of a 'Porsche-driving Aldi-buyer'. While a plethora of research exists that attempts to identify the motivations and socio-demographic characteristics of the different store format costumers, Gonzáles-Benito et al. (2005, p. 69) criticise the absence of research concerning competition between different retail store formats. They distinguish competition between different types of store formats and rivalry on an intra-format level, consequently the opposition amongst stores of the same format.

The literature on store formats can be traced back to discussions on 'cross shopping', which was primarily explored in the trade literature in the late 1970s (Cort and Dominguez, 1977). Focusing on special aspects of the retail mix (e.g. price, service) means that "retailers can compete on highly diverse dimensions" (Popkowski et al., 2000, p. 323). The academic literature has emphasised several highly influential factors determining grocery shoppers' behaviours and the consumer choice for a certain store format:

1. Price: prices of items within and across categories, which may vary from week to week with respect to promotions;
2. Variety: breadth or number of categories typically carried by the format;
3. Assortment: depth or number of items within a category;
4. Service: range of consumable and perishable benefits; and
5. Store location: Where the retail store is located and how this affects the costs of shopping to consumers.

Amongst the available formats, the literature and the trade press have emphasised 'Every Day Low Pricing' and 'High-Low Promotional Price' or 'Promotional Pricing' as two clear and opposing positioning choices. According to Jinglun (2003, p. 167), "[M]any international companies have employed an aggressive pricing strategy, and this has proved highly successful." Fox and Sethuraman (2006, p. 207) presage at the end of their investigation into retail competition, that global retailers such as Walmart and Carrefour achieve international success mainly due to their diversity of store formats. Due to the high saturation of many markets, several leading grocery retailers diversify in varying formats. The large majority of the leading food retailers worldwide practice a format portfolio, with each format targeting a certain consumer group and sales situation. Arguing that competition between formats is fundamentally different from competition within formats, Fox et al. (2002, p. 29) ask for further studies that include multiple geographic areas and larger panels. The research carried out in this paper exclusively focuses on 'between-format competition' from a retail expert point of view. Further, it is organised around the question of whether the discount format is suitable for the Chinese market and why it has not yet been established in one of the world's largest grocery retail markets.

2.2 The discount format – characteristics and main competitive advantages

When the Albrecht brothers took over the family business in 1945, they laid the foundation for the discount principle. Already by 1955, the network had increased to 100 branches in the Western part of Germany. One major change occurred when the two brothers introduced self-servicing: for the first time, customers were able to take food from the shelves themselves, revolutionising the way to shop. After the division of the company and the foundation of the two resulting Aldi Süd and Aldi Nord groups in the 1960s, Aldi (for Albrecht Discount) opened its first discount branch, as known today. In a rationally established salesroom, a small number of groceries was offered directly from boxes on pallets. Subsequently, a distinction between discount and full-range suppliers was firstly undertaken. Early in the 1960s, the grocery discount store Norma entered the market, follow by Plus, Lidl and Penny in 1972 and 1973. The format has since successfully been established in the German and European markets, as revealed by the increasing number of stores as well as the continuous growth of revenue share.

The German Institute for Retail Research defines discount stores as a format that offers a tight, tailored for rapid handling assortment for low prices. Since discounters need large item-specific purchasing volumes and high customer frequencies to execute this strategy, the discount business is almost exclusively operated by large companies with wide-ranging branch networks. Wortmann (2011, p. 103), who pointed out that in the English-speaking world, companies such as Walmart or Asda are called discounters, emphasises the importance and characteristics of the German discounters: namely the limited range and following a very aggressive 'everyday-low-price' strategy (Zentes et al., 2011, p. 34; Sonneck and Ott, 2006, p. 182). The 'no-frills-concept', offers products of low-price store brands, sold out of boxes with a high turnover speed (Zentes et al., 2011, p. 34; Ahlert et al., 2006, p. 290; Wortmann, 2004, p. 426). Furthermore, discounters can be sub-divided into soft and hard versions (Colla, 2003, p. 57): generally, relatively small in terms of store size, typically between 300–900m^2, hard discount stores, also known as limited-line or limited-assortment discounters, stock less than 1,000 product lines, largely packaged groceries, simply presented in practical furnishing. Merchandise may be displayed with the original manufacturer's packaging to reduce the cost of removing it. Importantly, goods are mainly 'own brands' or budget brands. Soft discounters, however, also known as extended-range discounters, are slightly larger but with the same frugal characteristics.

The crucial difference lies in the wider range of products, typically stocking 1,500–4,000 product lines. Soft discounters commonly carry own-label and budget brands, as well as leading brands at discounted prices (Hawkes, 2008, p. 660; Ahlert et al., 2006, p. 291; Colla, 2003, p. 57). Currently, hard discounters, such as Aldi, seem to be in transition: with rising numbers of branded products as well as extensive store conversions and modernisation processes underway, the branches gradually change the familiar face of the discounter landscape. The boundaries between discounters and full-line supermarkets like German Rewe or British Tesco become increasingly blurred (Hardaker, 2016, p. 12). Looking more closely at the key attributes of grocery discount stores, it becomes clear that they simultaneously represent its competitive advantages:

1. Low cost operations and merchandising: discount stores have 'everyday low cost' operations, with low cost store fit-outs and multi-skilled staff who reduce store operating costs. Merchandising is basic (for example, pallets are placed directly on the shop floor) while display shelving is limited;
2. Limited product range: discount retailers exercise strict range discipline to limit the number of products available in their stores;
3. Focus on price: the provision of low-priced goods is at the core of the discounter model. Prices are prominently featured in-store, typically in a high-profile position above the product itself, with the focus as much on price as it is on product in some cases;
4. Small store formats: core discount stores are relatively uniform in size and layout, which helps keep operating costs low. Typically, stores range in size from 800 m^2 (8,600 ft^2) to 1,500 m^2 (16,000 ft^2); and
5. Limited role for branded products: discounters traditionally place emphasis on private label products, and often 'exclusive' labels that do not carry the store name.

3. Method

As a lack of understanding of the grocery discount format prospects in the Chinese market exists, this paper intends to answer the following questions:

- Why do discount stores, as occurring in Europe, not exist in China to date?
- Does the grocery discount format have a future in China?
- What are the main characteristics and challenges of China's market for the discount format?

Expert interviews are the focus of this research. The study is based on twelve qualitative interviews with high-ranking senior executives of international retailers, mostly Chief Executive Officers (CEOs) or the head of expansion, but also with retail specialists and consultants, as well as professors, to receive a more balanced observation of the industry (see Tab. 1). All interviews were conducted between January and March 2015. Among the interview partners of this study were eight grocery retailers listed in the top 20 grocery chains in China, as well as international grocery retailers not (yet) operating in China. All interviews conducted lasted 45 to 110 minutes and were partly recorded and all transcribed and analysed. A limitation of the non-replicable one-off interviews is that respondents might be subjective in their assessments of their own company's skills and problems. Furthermore, some interviewees had often worked for several grocery retailers in the market and were therefore able to refer to more than one company during the interviews.

The results of this research contribute to work by researchers, current and future retailers and marketers, in considering the role of the discount store format and its development, acceptance and future in the Chinese market.

Type of interviewee / organisation	Name / Function
China Chain Store & Franchise Association (CCFA)	Anonymous / Retail Analyst
Chinese Retailer	Anonymous / Head of Merchandising
Major Chinese Retailer	Anonymous / Director of Strategy Planning
Major Hong Kong Retailer	Anonymous / Commercial Director
Major International Retailer I	Anonymous / Vice President
Major International Retailer II	Anonymous / Chief Executive Officer China
Major International Retailer III	Anonymous / Chief Executive Officer South China
Major International Retailer IV	Anonymous / National Expansion Director
Professor for Retailing	Mrs. Zhu Yi / Professor of Retailing
Retail Analyst I	Mr. Stocker / Retail Expert and Consultant
Retail Analyst II	Mr. Qui / Retail Analyst and Consultant
Retail Consultant	Mr. Kampf / Retail Expert and Freelance Consultant

Tab. 1: The list of interview partners

4. Results and discussion

Common agreement exists that the discount format, as present in Europe and represented by companies such as Lidl (Schwarzkopf Group) or Aldi, does not have a physical store presence in China. Yet, since March 2017, Chinese customers have been able to purchase products from Aldi Süd and Lidl via the Tmall Global e-commerce platform. The discounters offer selected products such as wines, snacks and breakfast products. The online marketplace is operated by the Chinese Alibaba Group. One year after Aldi Süd's digital market entry, the German retailer envisages the opening of a stationary shop network, including 50 physical stores and a central warehouse within the next three years. The following sections discuss the main factors contributing to the circumstance that a physical store presence has not yet been established, intending to evaluate the format's future in the People's Republic of China (PRC), on which experts disagree.

4.1 The need for localisation and the myth of one Chinese market

As market penetration requires long-term efforts, an early entry to obtaining a strong position in the market is necessary. For example, the German discounters highly standardise their domestic concept in foreign markets, following a global internationalisation strategy. As Colla (2003, p. 58) argues, mainly the discounter (such as Aldi, Lidl or Netto) reveals strong international presence, but employing a mono-format and a global concept, which is usually modified and adjusted only to a very small degree. One interviewee argues that "Aldi usually educates its consumers, which is very unlikely to work in the Chinese market" (Interview III, 2015). Acker's (2010) research on Aldi's US-expansion reveals that the format has been transferred (almost) unchanged. American consumers are not used to pack their purchase themselves and initially could not use credit cards, consequently adapting to Aldi's discount concept. Most of the interviewees agree that this would not work in the Chinese market. Whatever opinion, the difficulty lies, inter alia, in the extremely high territorial embeddedness of grocery retailers' activities (Coe and Lee, 2006, p. 61).

The internationalisation in food retail proves to be especially difficult, as the customer must be directly addressed with an overall supply, consisting of provision of goods and services on site (Huang and Sternquist, 2007, p. 614). To a certain extent the food retailer must become a substantial part of the community itself, in which it wants to do business. As pointed out earlier, China's retail landscape is characterised by tremendous regional variations with respect to economic, cultural, demographic and constitutional factors (Hardaker, 2017). The National Expansion Director of a large international retailer counters that the main characteristic of the Chinese market lies in "the fact that there is no Chinese market" (Interview II, 2015). The freelance consultant and former Head of Business Development at Metro China supports this argument and claims the treatment from the company's perspective on a city-level, meaning that Metro has "80 stores in 53 cities, so we treat it as 53 markets" (Interview V, 2015). This coincides with reports by Tacconelli and Wrigley (2009), Frank et al. (2014) and Siebers (2017), who point out the highly heterogeneous Chinese retail environment, including differing consumer preferences, as well as vast geographical, cultural and economic differences. The grocery retailing industry is still largely a local, city-based business due to the differences in consumers' tastes and behaviours. Exploring Chinese consumers' shopping experiences and preferences, Davis (2013), Frank et al. (2014) and Maruyama and Wu (2014) reveal that preference structures differ even more strongly along ethnic rather than geographical lines, most likely because ethnic differences involve larger cultural variance.

The different markets vary strongly with respect to tastes, spending power and consumer cultures. Respectively, China lacks a national market, which influences their spatial expansion and forces them to localise (Zhang and Wei, 2017). According to Siebers (2017, p. 23) these circumstances also lead to retail TNCs applying hybrid practices and adjusting the degree of their adaptation and alteration over time, showing both heterogeneous and homogeneous characteristics. Chuang et al. (2011) explore the structural paradox faced by retail multinational firms in China as they balance the competing demands of standardisation and localisation. With respect to the partial success of Walmart and Carrefour in China, Chuang et al. (2011, p. 460) highlight the importance of standardised business practices, explaining that the unique difficulties of the Chinese market are due to institutional settings that have generated a complex business environment. In their research on foreign hypermarket retailers in China, Zhang and

Wei (2015) analyse how transnational corporations resolve the structural paradox between enforcing standardisation and conducting localisation. They argue that foreign hypermarket retailers are constantly adjusting to better embed in the Chinese market and to more effectively resolve the structural paradox.

Implementing a wide-ranging branch network, which is necessary to purchase huge volumes and to achieve high customer frequencies to transpose the discount strategy, seems very difficult. Consequently, it is argued that the need for localisation provides one reason as to why discount stores are not successfully represented in the highly heterogeneous Chinese market.

4.2 Grocery discount stores: Everyone must be discount

The importance of sales and purchasing volumes in discount retailing has been underlined by analysts of the format (Colla, 2003). The major difference in prices compared to supermarkets and hypermarkets for products of comparable quality, is the main competitive advantage and the principal criterion of choice of this formula. When interviewed, the CEO of 7Eleven in South China sees potential opportunities in the formats main competitive factor, price:

> "[…] the current players […] are still very much price-orientated, and that doesn't give much space to discounters right now. But again, you don't know what the reality will be in a few years from now. […] the hypers will probably lose market share, as they are usually higher margin retailers, they might have to get money back from their food products, which will question their ability to stick to low-price-positioning? There is a risk that this will give market share to discounters. Again, it might depend on whether they stick to the aggressive price-strategy or not, I guess" (Interview IX, 2015).

The commercial director from ParkNShop China provides a more pragmatic answer:

> "Discount stores? I would say yes. There is a market for everything in China. […] But if they come, it should be soon, and they should operate in budget areas" (Interview XI, 2015).

This coincides with Zhen (2007, p. 230), who forecasts noticeable future growth of large retail players expected to establish discount chains. Yet, some interviewees argue that the current challenge facing discount stores in the Chinese market is the extreme low price of products already in supermarkets which offer a similar range of products. As one interviewee claims:

> "Which consumers are not price sensitive? So far, only advanced and mature markets have been entered by the discount format, with usually an oligopoly hierarchy being evident and prices and revealing a stable and higher level" (Interview X, 2015).

The interviewed retail expert from China Chain Store and Franchise Association clearly reasons, "everyone is a discounter somehow" and that it is "not the right thing for the Chinese market" (Interview IV, 2015).

> "Maybe in China 'discount' has a different meaning. Everyone has to offer discount, as it all depends on the offer" (Interview II, 2015).

The Fung Business Intelligence Centre (2013, p. 34) similarly attests to the increasing popularity of discount formats among consumers and retailers, with store numbers estimated at around 400. This figure, however, refers mainly to discount outlets. In 2013, Shanghai Bailian Group opened Wuxi Mall, its third discount outlet, proving that Chinese consumers are demanding formats that allow cost savings. Discount stores however, are not yet a significant channel, having only a limited presence in large cities, not following a rigorous discount concept as described in the case of German discounter Aldi, Lidl and others. Nevertheless, perhaps due to this lower-price focus, consumers are said to have the perception that products are of an average or lower quality (Song, 2011, p. 17), an opinion shared by most interviewees. According to the Assistant Director at CCFA, however, foreign brands in China are not only more expensive, but more trusted, as they are almost automatically associated with better quality. Consequently, several interviewees mentioned the possibility of private foreign labels branded as quality products.

This paper argues that the already low-price level in China represents a huge challenge for the provision of low-priced goods, which is at the core of the discounter model. If discounters do not succeed in branding their private labels as quality products, their main competitive advantage cannot be realised, consequently hindering the introduction of grocery discount stores.

4.3 The Chinese consumer and private brands

The limited convenience and uninspiring shopping experience provided by discount stores, coupled with high rental costs and a supply chain that is difficult to manage, might hinder the growth of the discount format (Interview II, 2015). This interviewed Chinese professor clearly states that there is "no need for discount stores", inter alia due to the low-price level at wet markets and the lack of advantages to go shopping in a discount store "which doesn't offer any uniqueness to its customer" (Interview XII, 2015). Despite a global increase in private label goods (Zhen, 2007, p. 14; Song, 2011, p. 18), in China the introduction of

> "own brands need(s) so much effort to control: firstly, the production, then the distribution. We don't have food-only-brands, because we thought it is too risky. But we have our own laboratories, which are very expensive" (Interview II, 2015).

In 2009 Tacconelli and Wrigley argued that the development of private labels in China was still in its embryonic stages (Tacconelli and Wrigley, 2009, p. 67). The retail analyst from Planet Retail clearly states that still today "discount stores are not working in China, as private labels are not accepted" (Interview VII, 2015). He further claims, however, that "it's not about the format itself; it is still a very new format." Yet, he asserts that the lack of trust in no name brands is the main reason for the unworkability of discount stores. Nevertheless, he highlighted the opportunity for international players to convince Chinese consumers of the trustworthiness of private brands, thus transforming them as acceptable new brands (Interview VII, 2015). Two interviewees highlight the example of Costco, an American retailer that recently tested the water in the Chinese market by offering private labels on the Internet. Selling out within three days, several experts agree that the retailer's brand reputation and customers' awareness was the main reason for its success, as many Chinese tourists travelling to the USA knew the brand (Interview II, 2015; Interview VII, 2015). German Aldi Süd is following a similar approach, offering a small selection of its own brands in an online shop since 2017, primarily entering a foreign market without implementing physical stores. The difficulties with respect to their own brands are omnipresent, as one interviewed expert refers to Dia, a very soft discount format that has been introduced to the Chinese market "with high expectations, which could not be met at all", due to the inability to achieve competitive prices (Interview V, 2015). Furthermore, own brands make up approximately 50% of products offered and these are constantly reduced. The ParkNShop China commercial director's opinion on the Chinese consumer's brand fondness is clear:

> "So, if I think about Aldi and Lidl, they are successful because firstly they served the lower-class customers that really say I don't need a brand, I want a good price and an ok quality. But Chinese customers really want brands. They are so brand sensitive: therefore, in China we have many retailers that have difficulties to launch their own brands […] So if it's not a brand, they don't consider it. They don't know it, so it's not good" (Interview XI, 2015).

In 2011, Qui and Zhao (2011, p. 22), similarly to Song (2011, p. 16), did not forecast thriving success for discount supermarkets in the short term, arguing that private labels have not yet gained consumer acceptance. This paper finds support for this rationale, arguing that without the extensive range of private label products discounters cannot gain share through a low-price structure.

5. Conclusion

The national retail environment is crucial to the development of international retail companies, as well as different store formats. As Alexander (1997, p. 74) acknowledges, some markets "may not be ready for certain retail formats." Dupuis and Prime (1996, p. 32) assert that "when a retail format is exported it has to face a new context which may affect its original competitive advantage […]." Alexander (1997, p. 117) reveals the result of new formats in a new market firstly through the transfer from one market to the other, and secondly through differentiated formats as a response from existing retailers in the target market. He further points out (op. cit., 1997, p. 307) that retailers seek to retain retail formats which they are familiar with.

Initially, operating from a low status position, the retailer evolves from a traditional position to a mature, high status one. Zhen (2007, p. 16) acknowledges the fact that the evolution of retail formats is increasingly accelerated, hence, shortening the life cycle of retail formats. Gonzáles-Benito et al. (2005, p. 59) briefly describe the transformation of store formats as a consecutive process with the introduction of supermarkets as the initial step, followed then by the larger versions of hypermarkets and the adjacent development of the discount store. In view of the Chinese market, such a consecutive process is only apparent to a very limited degree. The Chinese market has witnessed the entrance of modern store formats, rather than experiencing a domestic development from within. Also, within a short period of time, several formats have been introduced, enabling a simultaneous rather than consecutive development (Hardaker, 2017).

Despite the attractiveness of the Chinese grocery retail market, the grocery discounter format – although highly successful within their internationalisation process – has not entered the Chinese market yet. Companies in general prefer to enter markets that rank high in attractiveness, low in market risk and where they can enjoy a competitive advantage. This paper looks more carefully at the reasons as to why this is not the case for grocery discounters in the Chinese market. Despite the often-cited and argued price sensitivity of Chinese customers, retail discounters are not (yet) popular. Technically, discount stores do not exist in China to date. The conducted expert interviews revealed high disagreements with respect to the format's future in China. Whereas some retailers foresee a possible niche for discount stores, the Chinese interviewees express common incomprehension of the format, stating that it is not suitable for the Chinese consumer.

Predictions as to the promising future of the format in China are difficult. Yet, this paper argues for three major reasons as to why the discount format has not hitherto gained a foothold in the Chinese market. Firstly, due to the characteristics and challenges of the Chinese market, such as high fragmentation, fierce competition, the need for strong localisation as well as infrastructural issues, a high standardisation of the format, as existent in Europe for instance, is not possible. This is an essential difficulty that all retailers, irrespective of the adopted format, must face. Nevertheless, the discounter represents an extremely low-margin operation and strives for price leadership, which leads to the second argument. As remarked by several interviewed experts, the price level in China is already very low, and "everyone has to be a discounter somehow" (Interview II, 2015), confiscating one of the discounter's major competitive advantages. Thirdly, most experts agree that the discount format is facing a lack of consumer acceptance. The absent of trust combined with the desire to demonstrate wealth, make it difficult for retailers to establish their own brands, which represents one of the major characteristics of the discount format. Moreover, given the increasing role of convenience, the discount format seems not to fit into the Chinese retailing landscape. Regarding the criteria of choice of country for discount retailers (mainly hard discounters), Colla (2003, p. 64) argues that mature markets with a dominance of supermarkets and strong brands is usually chosen when internationalising, hence providing a possible explanation for absence within the Chinese market.

Future research should continue to explore Chinese customers' perceptions of private brands, as well as their possibly changing awareness of retailers such as Aldi Süd and Lidl, which in 2017 entered the Chinese e-commerce market. China is the first foreign country Aldi, whose initial online-offer only includes 100 own label food lines, has ever entered without establishing a physical store network, supporting this paper's argumentation. Moreover, future research may involve the evaluation of the discount online shops with respect to preparing the ground for a physical discount presence in China's cities. Thought about the future of discount stores in less developed parts of China should also be discussed. More research is urgently needed on all these aspects of retail format development in China. From a geographical perspective, it is important to position our understanding of national market conditions influencing format development alongside processes operating at other spatial scales. In terms of sourcing, for example, do retailers establish regional sourcing patterns serving multiple markets within China, and how does this vary across different kinds of commodities? Besides, to what extent do they influence format adaption? As outlined earlier, consumer habits and tastes heavily diverge across different sub-national regions, as well as between urban and rural contexts, possibly providing niche markets for grocery discount retailers.

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MORAVIAN GEOGRAPHICAL REPORTS

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Fig. 2: Shopping centre Arco-Íris, located in a dense urbanised area (Photo: P. P. C. Guimarães)

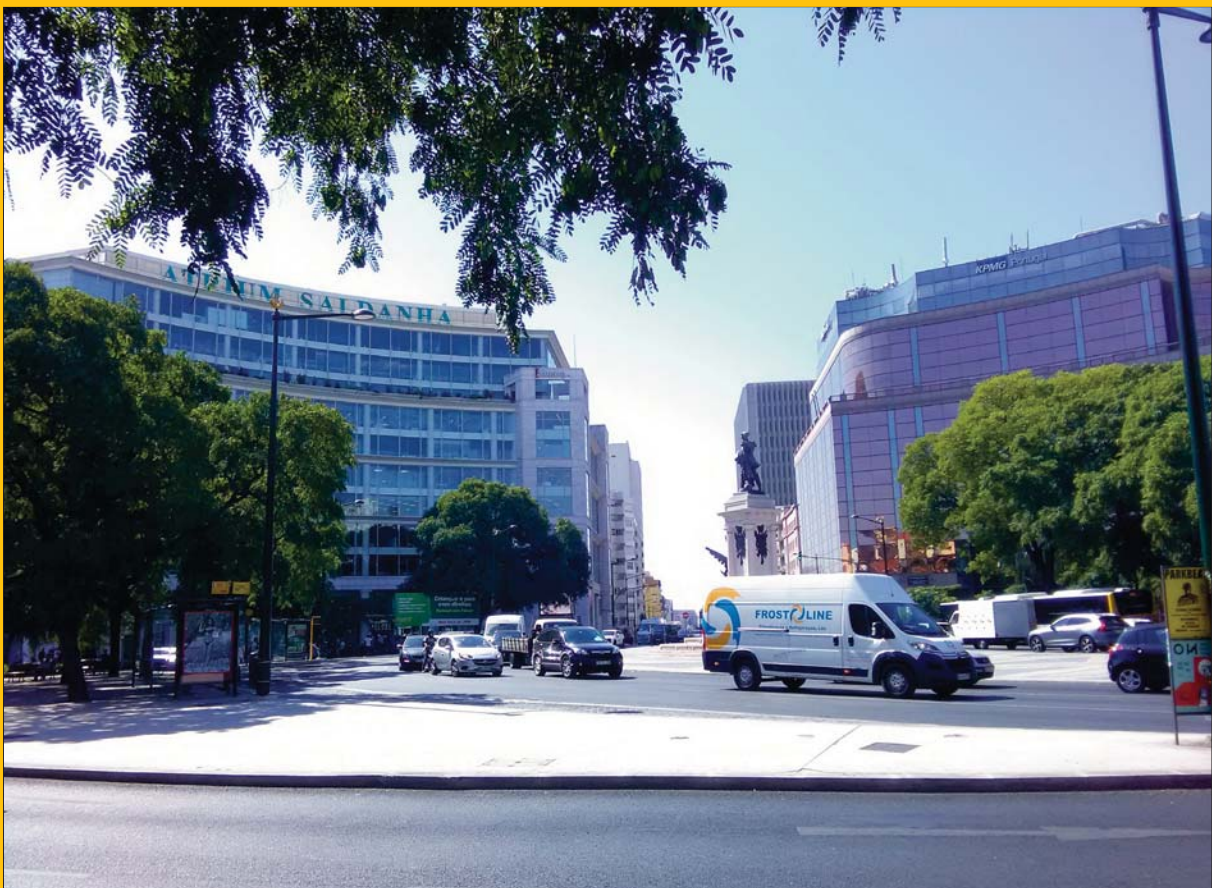

Fig. 3: Shopping centre Monumental (right on the photo), on the other side of the road from shopping centre Atrium Saldanha (left on the photo). Behind the latter is shopping centre Saldanha Residence (Photo: P. P. C. Guimarães)

Illustrations related to the paper by P. P. C. Guimarães