

Centre for Retail Research at Lund University

ANNUAL REPORT | 2015





Introduction

Centre for Retail Research – the second year

Yet another year of activities at the Centre for Retail Research is marked with this second annual report. During the past year we have strived to complete work within the two research programmes – “Competent Consumers” and “E-commerce” – that were initiated in 2014. A number of publications and conference presentations have already been produced and more are expected throughout 2016 as individual projects are finalised. In the second half of 2015, we have also formulated and commenced work with the new research programmes that will be the main focus of our activities in 2016 and 2017: “Retail Destination” and “Retail Innovation”. The central themes for Retail Destination are urban developments of retail and the integration of retail in the new urban structures that are evolving. In the case of Retail Innovation, it is the capacity for retail to create innovation – given the global trends of urbanisation, increasing e-commerce and the pressure of change on brick-and-mortar stores – that in various means will be the objective of studies. The new research programmes are presented in more detail in the text below.

The uniqueness of activities at the Centre for Retail Research is prevalent in the way that all research work is performed interdisciplinary, with participating researchers from all the represented academic disciplines in each and every research project. This ensures a multifaceted assessment of the research problems in which we are engaged.

Visible forms of research outcome are the research seminars that we have arranged, and in 2015 there were a total of six seminars. We have further held three well-visited workshops attended both by academics and business practitioners. The first one, on the theme “CSR in Retail”, was held in May and speakers included Renée Andersson from the Swedish retailer Indiska and Stephen Brammer from the Birmingham Business School, University of Birmingham. Topics discussed at this event were, for instance, if retailers can be active in CSR issues at the same time as they aim



for profitability, or in other words, is it possible to gain pay-off from CSR investments? The Centre held its second workshop in October, co-arranged with EFL, at which point the latest retail trends were presented to a crowded audience at Lund University School of Economics and Management. Finally, the third occasion was in November when we arranged a workshop on the theme “Retail Destination”, one of the new research programmes that we will start up in 2016. This was held at Campus Helsingborg and among the expert speakers that discussed the topic of the day – “A Retail Sense of Place” - were Leigh Sparks from the University of Stirling, Mattias Kärrholm from the Department of Architecture, Lund University and Kerstin Gustavsson, head of the City of Malmö Street and Parks Department.

The ambition has been to use our website as a vehicle for spreading information about activities at the Centre for Retail Research and this has now been achieved to large extent. On the website, a spectrum of material is presently available; seminar video recordings, research project reports, summations of relevant research literature, presentations of our faculty, and topical comments by members of the Centre, to mention a few examples. We have received much positive feedback on these website additions and will continue to develop our presence with more exciting initiatives.

During 2015, our international co-operations were extended with new research partners. Besides the earlier established connections with the University of Stirling, we now can add the University of Oxford – for example in the form of faculty exchange – and Università Bocconi (Milan) to our network of international co-operation. Furthermore, in late-2015 we established contacts with the Department of Marketing, Operations and Supply at EADA Business School (Barcelona) and in 2016 we will develop plans with representatives from EADA for future co-operation.

The Centre for Retail Research has grown during 2015 and in addition to the researchers financed by the main grant from the Swedish Retail and Wholesale Development Council (HUR), we now embrace another 30 affiliated researchers and a number of recently initiated research projects in our Centre.

Lastly, I would like to extend our gratitude to the Centre’s financiers; the Swedish Retail and Wholesale Council that provides our founding and main research grant, and a number of financiers that we have received funding from for the new and affiliated projects we are engaged in; the Torsten & Ragnar Söderbergs Foundations, Handelsbankens Research Foundations, the Helsingborg Retail Association, Haakon Swensson Foundation and Vinnova.

My colleagues at the Centre for Retail Research and I have had an interesting and eventful 2015. We hope that we have managed to capture the year in an informative and enlightening way in this report and for you as a reader.

Sincere regards,

Ulf Johansson
Professor and Director of the Centre for Retail Research

Focus on events – a selection

LARGE INCREASE IN VISITORS AT HANDEL.LU.SE

During 2015, the Centre for Retail Research's website – handels.lu.se – had 12,765 visits distributed on 3,868 sessions by 2,417 unique IP-addresses. The majority of visitors were from Sweden and the frequency of visits increased substantially compared to 2014. The most popular news event was the trend seminar held in Lund in October.

CO-OPERATION WITH UNIVERSITY OF STIRLING

Cecilia Fredriksson and colleagues (Lena Eskilsson, Ola Thufvesson and Devrim Umut Aslan) visited the University of Stirling in March with the purpose of presenting retail research conducted at Lund University and Campus Helsingborg, as well as consolidating with retail researchers (Leigh Sparks and Paul Freathy) on topical issues in this field.

PACKBRIDGE RESEARCH FORUM, LUND: ON ALTERNATIVE CONSUMPTION

Packbridge is an international cluster organisation for packaging and logistics industry and a meeting place for practitioners and academics alike. In May, Cecilia Fredriksson was invited as speaker at the Packbridge Research Forum held in Lund. The title of her presentation was "Alternative consumption practices: On crafting confessions and the creative consumer".

SEMINAR, LUND: RETAIL CRS

On May 18, the Centre for Retail Research arranged a seminar on the theme "Retail CSR: opportunities and challenges". CSR and sustainability are issues that in recent years have become increasingly important to address and to become engaged in for retailers. Both academic and practical approaches to CRS activities within the field of retail were presented here.



Head speakers were Renée Andersson who is CSR head at the Swedish retailer Indiska and Honorary Doctor at the Faculty of Engineering, LTH, and Stephen Brammer from the Birmingham Business School, University of Birmingham and Visiting Professor from Lund University School of Economics and Management.

BREAKFAST SEMINAR, STOCKHOLM: RETAIL PREPARING FOR MULTICHANNEL

Jens Hultman visited HUI Research in Stockholm September 11, invited to speak at a breakfast seminar. A large audience attended the event and Jens gave a talk on the theme "Retail preparing for multichannel". The seminar was mentioned in media, for example by the Swedish journal Affärsvärlden.

TREND SEMINAR, LUND: THE LATEST RETAIL TRENDS FROM LONDON

The Centre for Retail Research arranged a retail trend seminar on October 5, co-hosted by EFL, and with participants in the Executive MBA programme at EFL as seminar presenters. The objective was to investigate current European trends in retail change and their impact on future consumer trends in Sweden as well. In recent years, there has been an intensified shift towards increasing emphasis on retail services, modifying both the contact channels to customers and the retail offer as such. Ulf Johansson opened up the seminar and an entertaining show appealing to all five senses followed when Catharina Aaröe, Katarina Liljenberg, Maria Rang and Per Werlinder gave their view on the hottest retail and consumer trends based on input from a trend spotting visit to London.



RESEARCH OUTLOOK, STOCKHOLM: THE DEVELOPMENT OF SUSTAINABLE SUPPLY CHAINS

The fourth annual Forskningsinblick (Research Outlook) at which different aspects of retail research is presented, took place in Stockholm November 23. Jens Hultman was one of four invited speakers and gave a talk on "The development of sustainable supply chains".

INTERNATIONAL ONE-DAY CONFERENCE, HELSINGBORG: SENSE OF PLACE AND RETAIL

In collaboration with the research group Helsingborg Retail at Campus Helsingborg, the Centre for Retail Research arranged an international one-day conference themed "Sense of Place and Retail: localization, attractiveness and accessibility". Among the keynote speakers were Leigh Sparks at the University of Stirling, and Cecilia Fredriksson presented her research on "Retail planning practice" at the conference.



OVERARCHING THEMES

The Centre for Retail Research at Lund University is an interdisciplinary centre of excellence with a research focus on the flow of goods and interactions with customers – two crucial aspects of well-functioning and efficient retail.

During 2014 and 2015, the research has focused on the two overarching themes *Competent Consumers* and *E-Commerce*. The most prominent challenges and results are present in the following sections.

Theme: Competent Consumers

The overarching knowledge goal for the research group Competent Consumers has been to highlight, analyse and communicate the future needs for retail competence in a market where evermore competent customers express ever-larger demands for information and transparency. Today's savvy consumers present both challenges and opportunities to retail. Competent customers pose extended demands on everything from assortment, service, payment, accessibility and channels, to new expectations on return logistics and information on traceability, production

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conditions and environmental impact. Evermore competent consumers also drive the development of technological systems, routines and training. Retail hence must be at least as competent, at least as knowledgeable as the customer and needs to be at the forefront in order to understand new demands and changing consumer patterns. Some consumers might even choose to refrain from, or drastically cut back on, consumption that is perceived of as unnecessary or unethical. An explicit tendency as regards identity, sustainability issues and alternative strategies for consumption, is the increased occurrence of viewing modern societal risks as isolated, individual problems. In this context, retail agents need to reflect on how changing consumer attitudes towards ownership, demands and status could be addressed.

The common ambition of the research group has been to shed light on how different retail agents can support the consumer's value-creating processes from research premises such as the following. What demands on the flow of goods do increased transparency raise? How can management systems and forms of collaboration be created that would enable continuous innovation and development? What do contemporary key concepts such as traceability and transparency mean? What forms of new demands are consumers in different retail contexts expressing? What consequences do these create with regard to how the customer encounter is handled? Based on different perspectives of the concept of "customer" (consumer, supply manager, store, wholesaler, individual/group), the research group has focused on a number of value-creating processes that deal with different forms of learning and learning processes: "How is knowledge and understanding about the consumer created?"

The research group has been composed of researchers and doctoral students within logistics, ethnology, business administration and service studies. Taking point of departure in a number of research questions, the group has carried out several joint collections of both qualitative and quantitative data. We have sought answers to questions such as choice of retailer payment systems, payment practices of customers both in-store and online, customers' return practices, consequences of sustainability demands by customers and alternative consumption strategies, as well as digitalised shopping practices based on mobile usage in a store context. The rapid development of alternative solutions for payment in recent years has led to a more fragmented market. In addition, this has meant that the competition has increased for suppliers of payment methods and that retailers as well as consumers today have access to new and differing ways of purchasing. The market for payment systems is constituted by a duality in the sense that suppliers of payment methods have both the retailer and the consumer as customers. The research group has, furthermore, been interested in the development of competence in the supply chain area and the interface between the individual and the organisation, with the objective of identifying success and risk factors respectively when advanced technological solutions are implemented in the retail sector.



The research group has presented its research both in Sweden and abroad, and has generated specific competences on qualitative and quantitative methods as well as expertise in supply chain, logistics, e-commerce, consumer behaviour, consumer culture, value creation, practice theory and new payment systems. The work of the research group has resulted in several publications in international journals, interdisciplinary collaborations and joint research applications.

Cecilia Fredriksson

Theme: E-Commerce

The Swedish retail landscape is in a state of flux. Two of the reasons behind this change are the rapid spread of new technology and the increasing retailer usage of meeting customers through new sales channels complementing the traditional brick-and-mortar store. Smart phones and tablets have quickly gained territory and proved to be extremely useful technological solutions for various utilities, communication and entertainment.

It is essential for retail to offer customers the option of cherry picking from the physical as well as the digital contact surface and to ease their movements between the two.

The research group working with e-commerce at the Centre for Retail Research have conducted a thorough examination of Swedish retail from the outset of the following questions: How do customers shop in the new retail landscape? How well equipped is retail to live up to the expectations and demands that consumers have on e-commerce? What business model for e-commerce has retailers adopted and how do retail deal with e-commerce strategically? We have performed both empirical studies and surveyed the literature in this field of research. In late-2014, a broad study was made and during 2015, further empirical data collections and analyses of customers, companies and value chains were carried out.

Some of the research group's general conclusions are:

- E-commerce and multichannel is here to stay. Multichannel retail is business critical to its nature but even so it will over time lose some of its competitive edge and become more neutral – multichannel is inherently part of retail practices and the essential issue is how it is employed.
- Different retail sectors exhibit different approaches on how to deal with multichannel and e-commerce. In certain retail branches the adaptation is swift and forceful, in others the process is slower. Market concentration, the character of the offer and the complexity of the product, customer behaviour and competition are all determinant factors. In the long run, however, remaining a passive bystander in this development will lead to substantial, even devastating, costs.
- Multichannel and e-commerce generate opportunities and challenges. Some customers have sensory desires and want to touch, feel and smell, in which case the physical contact surface is crucial. Some consumers have other needs and want to shop instantly, smoothly, without any hassle and on a 24/7 basis. It is essential for retail to offer customers the option of cherry picking from the physical as well as the digital contact surface and to ease their movements between the two.



The research group has included researchers from a number of disciplines, its composition has encompassed broad methodological stances and both junior and senior scholars. We have in various ways, for example through research seminars, workshops and academic presentations, spread our research results. In 2014, the research group arranged a well-attended workshop in Lund on theme "Multichannel" and during 2015 we have participated in and shared our research at both national and international conferences.

Jens Hultman

NEW THEMES

From the turn of the year 2015 and onwards, two new research programmes will be on the agenda for the Centre for Retail Research: *Retail Destination* and *Retail Innovation*. Both

are strongly connected to our general research focus on the flow of goods and on the consumer meeting. Each of the two research programmes is presented in the following sections.

Theme: Retail Destination

The point of departure for the research programme Retail Destination is the interconnection between retail and location. Central to the programme are issues such as establishment concerns, store format, shifting patterns of consumption, logistics, and urban and spatial planning. The presence of retail at any place triggers numerous processes and actors. The retail-location relationship can be studied from various perspectives. In this context, the retail destination could be a store, a shopping or market street, a city centre, a mall, a flea market or even a whole town, each with its own specific potentials and limitations. How can such different retail destinations be described and perceived? By which means can we explain the diverging conditions and practices connected to certain locations of retail? How can a city or any other form of venue become an attractive destination for shopping?

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Research on location and establishment of retail is frequently short-sightedly focused on the specific store concept, a defined store format or a clean-cut issue of establishment. A knowledge gap, nevertheless, prevails as far as how the organisation and formulation of different store concepts and retail milieus can be linked to the consumer. This programme aims at enhancing and exploring new knowledge in the area of the consumer and the service encounter in the physical store. The digitalisation of retail as well as the increasingly more competent consumer poses new demands on retailers. What is the role of the store environment and the store concept with regard to the consumers of today and of tomorrow?

We are in need of new awareness into how agents of retail establishment function and what part they play in a number of related areas. Today the challenges are mainly about how to address e-commerce and the digitalisation of every-day life. In this respect, there is an on-going generation of insights into how the retail sector should act in the future. At municipal and local level, visions of how today's e-commerce could evolve into the "e-city" of the future is taking form. Characteristic concepts for depicting the present e-mobilisation both in Sweden and in Europe are "multiformat" and "flexible retail". This also leads to different ideas on which forms of retail that are desirable to cities and other locations. The thought of multiformat is often



envisioned as a store that is active and open around the clock, which would imply new demands on the supply of goods, return policies, more varied systems of delivery and new solutions to logistic issues.

The processes of urban densification and growing e-commerce usually entail that the physical distance between the consumer and the producer increases and thereby it becomes more problematic to producers to safeguard the access of products to the consumer through different channels. In addition, densification also places more pressure on the symbiosis between people and transportation in an urban milieu and such challenges require a multiple-agent perspective and systemic analysis. Absolutely essential to all forms of retail is the distribution of goods and service through an efficient logistic system.

There is presently an increasing interest for environmental and sustainability issues in relation to retail and consumption. We can see a rise in alternative practices of consumption as well as alternative retail destinations as a consequence of the expanding tendency of consumers to reflect on question that have to do with growth, value and quality of life. By incorporating retail destinations and issues of establishment into a larger framework and by analysing place, location and hinterland, we can generate the understanding and the tools that are needed for a long-term sustainable social development.

Cecilia Fredriksson

People at the Centre

MANAGEMENT GROUP

CECILIA FREDRIKSSON	PROFESSOR, CAMPUS HELSINGBORG
JENS HULTMAN	ASSOCIATE PROFESSOR, SCHOOL OF ECONOMICS AND MANAGEMENT, CENTRE COORDINATOR
ULF JOHANSSON	PROFESSOR, SCHOOL OF ECONOMICS AND MANAGEMENT, CENTRE DIRECTOR
ANNIKA OLSSON	PROFESSOR, FACULTY OF ENGINEERING (LTH)



Fr.v. Annika Olsson, Cecilia Fredriksson, Ulf Johansson, Jens Hultman.

REFERENCE GROUP

RENÉ ANDERSSON	CSR DIRECTOR, INDISKA
ANDERS DAHLVIG	FORMER CEO, IKEA GROUP, BOARD MEMBER OF H & M AND OTHER RETAIL COMPANIES
JOHN DAWSON	PROFESSOR EMERITUS, UNIVERSITY OF EDINBURGH
ÅSA GABRIEL	HR DIRECTOR, ICA GROUP
KERSTIN GUSTAFSSON	STREETS AND PARKS DIRECTOR, CITY OF MALMÖ, SWEDEN
PETER JELKEBY	CEO/EXECUTIVE, CLAS OHLSON
THERESE MÖLLER	HR SPECIALIST, LAWS & CONTRACTS, IKEA
ROBERT OLSSON	HR DIRECTOR, BERGENDAHLS FOOD
KARIN M EKSTRÖM	PROFESSOR, UNIVERSITY OF BORÅS

PROFESSORS

CECILIA FREDRIKSSON	CAMPUS HELSINGBORG
ULF JOHANSSON	SCHOOL OF ECONOMICS AND MANAGEMENT
ANNIKA OLSSON	FACULTY OF ENGINEERING (LTH)

RESEARCHERS

CHRISTIAN FUENTES	CAMPUS HELSINGBORG
KLAS HJORT	FACULTY OF ENGINEERING (LTH)
JENS HULTMAN	SCHOOL OF ECONOMICS AND MANAGEMENT
ANETTE SVINGSTEDT	CAMPUS HELSINGBORG
VERONIKA TARNOVSKAYA	SCHOOL OF ECONOMICS AND MANAGEMENT

DOCTORAL STUDENTS

PERNILLA DERWIK	FACULTY OF ENGINEERING (LTH)
NIKLAS JONSSON	SCHOOL OF ECONOMICS AND MANAGEMENT
CARIN REHNCRONA	CAMPUS HELSINGBORG

AFFILIATED RESEARCHERS

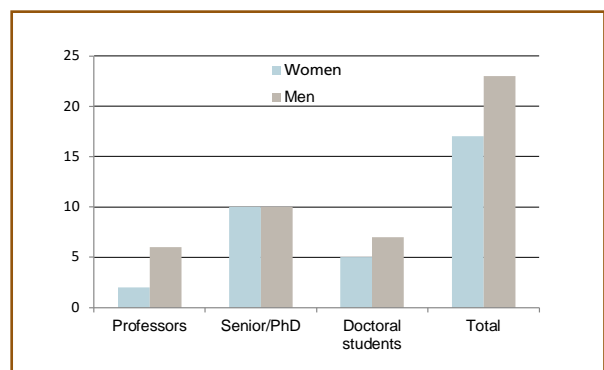
JOHAN ANSELMSSON	SCHOOL OF ECONOMICS AND MANAGEMENT
JON BERTILSSON	SCHOOL OF ECONOMICS AND MANAGEMENT
MICHAEL BJÖRN	SCHOOL OF ECONOMICS AND MANAGEMENT
KRISTINA BÄCKSTRÖM	CAMPUS HELSINGBORG
ULF ELG	SCHOOL OF ECONOMICS AND MANAGEMENT
LENA ESKILSSON	CAMPUS HELSINGBORG
KERSTIN GIDLÖF	THE FACULTIES OF HUMANITIES AND THEOLOGY
CLARA GUSTAFSSON	SCHOOL OF ECONOMICS AND MANAGEMENT
DANIEL HELLSTRÖM	FACULTY OF ENGINEERING (LTH)
MATS JOHNSSON	FACULTY OF ENGINEERING (LTH)
MAGNUS LAGNEVIK	SCHOOL OF ECONOMICS AND MANAGEMENT
MATTHIAS LEHNER	THE INTERNATIONAL INSTITUTE FOR INDUSTRIAL ENVIRONMENTAL ECONOMICS, IIIIE
MALIN OLANDER ROESE	FACULTY OF ENGINEERING (LTH)
JONAS NORDSTRÖM	SCHOOL OF ECONOMICS AND MANAGEMENT
OLA THUFVESSON	CAMPUS HELSINGBORG
SOFIA ULVER	SCHOOL OF ECONOMICS AND MANAGEMENT
ANNIKA WALLIN	THE FACULTIES OF HUMANITIES AND THEOLOGY
HANNA WITTRÖCK	FACULTY OF SOCIAL SCIENCES

AFFILIATED GUEST PROFESSORS

STEPHEN BRAMMER	UNIVERSITY OF BIRMINGHAM, UK
DANNIE KJELLGARD	SYDDANSK UNIVERSITET, DENMARK

AFFILIATED DOCTORAL STUDENTS

DEVIRIM UMUT ASLAN	CAMPUS HELSINGBORG
IDA DE WIT SANDSTRÖM	CAMPUS HELSINGBORG
CARYS EGAN-WYER	SCHOOL OF ECONOMICS AND MANAGEMENT
STEFAN KARLSSON	FACULTY OF ENGINEERING (LTH)
MARCUS KLASSON	SCHOOL OF ECONOMICS AND MANAGEMENT
KAJ-DAC TAM	SCHOOL OF ECONOMICS AND MANAGEMENT
YULIA VAKULENKO	FACULTY OF ENGINEERING (LTH)
FRANCISCO VALENCIA	SCHOOL OF ECONOMICS AND MANAGEMENT
JÖRGEN WETTBO	SCHOOL OF ECONOMICS AND MANAGEMENT



Affiliated projects – three examples

THE EYE DECIDES

“The Eye Decides” is a project financed by the Haakon Swensson Foundation. The project aim is to improve our understanding of the customer’s visual attentiveness while making purchasing decisions in grocery stores. The outlay of the visual milieu has great importance on the decisions we make and large influence on product sales. In order to grasp how packaging and shelf design affect a potential consumer of a certain product, it is essential to investigate the interplay of visual attentiveness, preferences, familiarity and external factors such as the visual characteristics of a product and the way products are organised on the shelf. Over the last year, we have carried out two sessions of video recordings in store by using mobile eye tracking. In all, we have collected data from 113 shopping sprees made in two grocery stores.

Results so far show that customers with little or no previous experience of a store spent more time looking at products than customers did that are well-acquainted with the store. The “inexperienced” customers were also more active in their decision-making process and took more time comparing different products. For certain product categories this led to more optimal purchasing decisions by the customers that were new to the store and also better matching of the products they said they wanted and the ones they actually bought. The practical implications of this project are relevant to both retailers and developers of packaging design with respect to product design and product placement. Questions raised are, for example, when and where it becomes crucial to have packaging that stands out from the ordinary, and how different strategies can be formulated in order to capture different categories of consumers.

URBAN AND RURAL AUTOMATED PARCEL STORAGE AT BUSINESSES AND GOVERNMENT AGENCIES

E-commerce sales in Sweden exceeded 50 billion SEK in 2015. Parallel to the substantial growth that has taken place in e-commerce, the serious shortcomings of traditional systems of distribution have become apparent and modern consumer demands are difficult to live up to. E-commerce trends in Sweden as well as internationally clearly show that the consumer nurtures a growing desire to decide how the last leg of delivery should be conducted. One solution to this “last mile problem” could be technological, in the form of automated parcel storage. The concept of storing packages in automated machines could be one way of improving both accessibility and efficiency in retail distribution systems, and hopefully also lead to the development of more sustainable environmental solutions. The technique is already in use in other countries but little is still known on the effects of its implementation.

The project is financed by Sweden’s innovation agency, Vinnova. The goal of this project is to enhance our knowledge of how and where the placement and localisation of parcel storage should be made. Looking at infrastructure factors such as collective means of transportation, type of housing area – whether it is urban, suburban or rural – the presence of malls, department stores and other shops is necessary if we want to measure the impact of this technique on the availability of distribution systems and, in a wider context, possible societal benefits. The project is unique in the sense that a number of agents are included and the value-creation that these parcel storage machines could generate is viewed as part of a general, more flexible distribution service for the various agents. One in particular important question that needs attention is whether this technique could contribute to the accessibility of a simple and smooth system of distribution throughout Sweden, regardless of an area being defined as urban or rural: a so far unanswered question.

CONNOISSEURSHIP, SNOBBISM AND INVOLVEMENT: THE COLONISATION OF THE CULTIVATION TREND ON EVERYDAY CONSUMPTION

How did the average Swede turn into an everyday snob? The research project “Connoisseurship, Snobbism and Involvement” has the objective of enhancing our understanding of the specialisation and cultural refinement of consumption: a process that has laid the ground for product development by brand owners and the increasing supply of retail products to consumers, including premium offers. It is no longer just a question of what we consume but how we consume, and why. What are the reasons behind this shift in consumption – from having been basically functional to nowadays evolving around status and self-realisation – when looking at products such as wine, salt, liquorice, butter, flour, and olive oil?

The project is financed by Ragnar Söderberg Foundation and investigates the popular cultures that have arisen for example with regard to food (“foodies”) and does so from different perspectives. One finding is that hierarchies of this form of “nerdery” defy traditional Bourdiesian theories of low and high culture in content, but also that the same theories are confirmed when looking at the way consumers gain status through their consumption: namely by refining practices and intellectualising knowledge. The insights generated in the project are frequently presented at various seminar and panel sessions, but first and foremost spread through guest speaker invitations to auditions often including both business representations and policy makers, nationally in Sweden and at international forums.

Popular science presentations and visibility in the media – a selection

Helsingborg Retail Association and the Centre for Retail Research	Forum Campus, Helsingborg	February	Cecilia Fredriksson, Devrim Umut Aslan
From the lab into the wild	Workshop on methodological issues in mobile eye tracking, Aarhus, Denmark	March	Annika Wallin
Analysis of mobile data using manual annotation	Workshop on methodological issues in mobile eye tracking, Aarhus, Denmark	March	Kerstin Gidlöf
Shopping, street, community	Stirling University, Stirling, UK	March	Devrim Aslan
Large retail growth	Interview in Swedish newspaper Kristianstadsbladet	March	Jens Hultman
Why do packaging exist?	Tetra Pak: packaging an intentional choice, Stockholm	March	Annika Olsson
Who decides what you buy? On visual attentiveness and store decisions	Lund University Food Studies, kick-off, Lund	April	Annika Wallin
Happy Shabby Chic: On Crafting Confessions and the Creative Consumer	Gothenburg University, Gothenburg	May	Cecilia Fredriksson
Worthless or something to create value from	Packbridge Research Forum, Lund	May	Annika Olsson
Retail of tomorrow	The Scanian Food Festival, Brösarp	May	Ulf Johansson
Trends in packaging and smart retail solutions	Week of Entrepreneurship, Båstad	June	Klas Hjort
The green consumer's view on packaging	Krav Seminar, Malmö	June	Annika Olsson
Sustainable supply chains in retail	Week of Entrepreneurship, Båstad	June	Jens Hultman
Cities in danger of depletion	Interview in Swedish newspaper Söderhamns-Kuriren (June 11)	June	Jens Hultman
Retail getting ready for multichannel	HUI Seminar, Stockholm	September	Jens Hultman
The mobile is young people's store	Interview, Telia Website (October 20)	October	Christian Fuentes
The digital shopper. How do you create strategies for multichannel?	Presentation, Retail House breakfast meeting, Stockholm	October	Ulf Johansson
How to develop sustainable supply chains	Research Outlook (Forskningsinblick) 2015, Stockholm	October	Jens Hultman
Brand strategy for omnichannels	Campus Open, Helsingborg	november	Cecilia Fredriksson
	Presentation, Swedish Association of Communication Professionals, Malmö	November	Ulf Johansson
When retail arrives. Possibilities and challenges for regional retail	Campus Open, Helsingborg	November	Cecilia Fredriksson
Urban and rural automated parcel storage at businesses and government agencies	Campus Open, Helsingborg	November	Klas Hjort
Four questions for Professor Cecilia Fredriksson	Article in Swedish newspaper Helsingborgs Dagblad (November 15)	November	Cecilia Fredriksson
Children also critical to the abundance of products	Interview in Swedish newspaper Sydsvenskan (December 22)	December	Cecilia Fredriksson
Recycling Project	Plans Networking Day	December	Klas Hjort



Publications

JOURNAL ARTICLES

Burt, S, Johansson, U and Dawson, J (2015) **International retailing as embedded business models.** *Journal of Economic Geography* 28 (March), 1-33

Fuentes, M & Fuentes, C (2015) **Risk Stories In the Media: Food consumption, risk and anxiety.** *Food, Culture and Society: An International Journal of Multidisciplinary Research* 18(1), 71-87

Fuentes, C (2015) **Images of Responsible Consumers: Organizing the marketing of sustainability.** *International Journal of Retail and Distribution Management*, 43(4-5) 367-385

Fuentes, C (2015) **How Green Marketing Works: Practices, materialities and images.** *Scandinavian Journal of Management* 31(2), 192-205

Lindh, H, Olsson, A & Williams, H (2015) **Consumer Perceptions of Food Packaging: Contributing to or Counteracting Environmentally Sustainable Development?** *Packaging Technology and Science* 29(1), 3-23

CONFERENCE ARTICLES AND ABSTRACTS

Aslan, D (2015) **How do consumers make the cultural geography of a 'low-end' street? The case of Södergatan: a high-street at the urban margins,** Paper presented at the Royal Geographical Society's Annual International Conference, 1-4 September, Exeter, UK

Aslan, D (2015) **Shopper practices at a local street.** Presented at Sense of Place and Retail: localization, attractiveness and accessibility, 23 November, Campus Helsingborg, Lund University, Helsingborg

Bäckström, K, Fredriksson, C & Thufvesson, O (2015) **Change of plans: A multidisciplinary exploration of consumers purchasing dynamics.** Presented at Sense of Place and Retail: localization, attractiveness and accessibility, 23 November, Campus Helsingborg, Lund University, Helsingborg

Derwik, P (2015) **Exploring cross-functional and cross-border competences in implementing technology.** ELA doctoral symposium, 24-27 June, France

Elg, U & Hultman, J, (2015) **Retail Activities vs Consumer Perceptions and Buying Decisions Regarding Social Responsibility.** Paper presented at the EAERCD Conference, 1-3 July, Rennes, France

Fredriksson, C & Aslan, D (2015) **Second-hand values and the production of ethical urban markets.** Paper presented at the Nordic Ethnology and Folklore Conference, 20 August 2015, Copenhagen, Denmark

Fredriksson, C (2015) **Alternative consumption practices and the creative consumer.** Paper presented at the Royal Geographical Society's Annual International Conference, Geographies of the Anthropocene, 1-4 September, Exeter, UK

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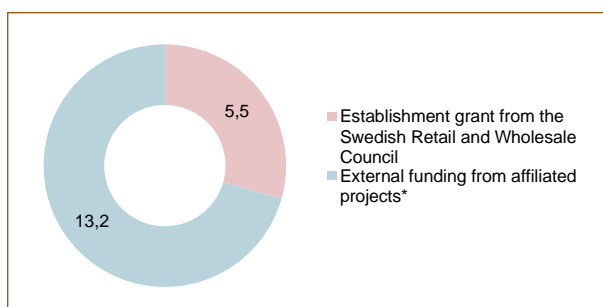
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LUND
UNIVERSITY



Centre for Retail Research at
Lund University
P.O. Box 118
SE-221 00 Lund
SWEDEN
www.handel.lu.se