



Centre for Retail Research at Lund University

ANNUAL REPORT | 2017





The whole workshop series has been spot on for us. Interesting speakers and great group discussions. Thank you letting us take part!

Ylva Skoogh, Integrate



Introduction

Centre for Retail Research – the fourth year

It is now four years since the centre for retail research was founded and, during our fourth year, we have continued to develop and expand our operations. The research programmes that we started in 2016 – Retail Destination and Retail Innovation – are producing results that have been presented to the scientific community at various conferences.

Disseminating the results of our research to practitioners as well as academics has also been an important element of our work this year. In partnership with The Swedish Retail and Wholesale Council, the Centre arranged three workshops this year that focused on the future of the physical store. The May workshop focused on digitalisation; in September we explored customer experience; and finally, in November, we concentrated on sustainability in retail stores. Speakers at the workshops included researchers from the Centre, of course, but also esteemed presenters from Gothenburg University, Stockholm School of Economics, EADA in Barcelona, Oxford University and the London College of Fashion. The findings



of these workshops, in which around 150 practitioners took part, are available in video form on our website and will also be summarised in a book in 2018.

The Centre also organised several well-attended seminars at Almedalen 2017, in conjunction with Lund University. Themes included the future of city centre shopping and the necessity of packaging.

The Centre is unique in that all of its research programmes are interdisciplinary. Every one of our research programmes is staffed by at least one researcher from each of the Centre's various disciplines. This guarantees a multifaceted perspective on the research problems we handle. In our quest for post-2018 financing we are increasingly assured that this is a positive factor. Interdisciplinarity offers us broader perspectives on the phenomena we study and it is great that our stakeholders also see this as a plus.

The Centre for Retail Research works with the scientific community as well as with industry partners. As you will see in this report, our researchers are attractive to industry as, for example, speakers and also publishing a great deal of high-quality research. See the lists of popular science presentations and scientific articles at the end of this report. It bodes well for the future that we are relevant both to practitioners and to other researchers. But despite all our successes, there are new challenges ahead in 2018 and beyond. Securing our finances after our funding from the Swedish Retail and Wholesale Council expires in 2018 is of the utmost importance. It is a challenge we are facing head on.

Cordially,

Ulf Johansson
*Professor and director of the Centre for Retail Research at
 Lund University*

Focus on events – a selection

LUND UNIVERSITY'S 350TH ANNIVERSARY CELEBRATIONS

This year Lund University celebrated its 350th anniversary. As part of the celebrations, Ulf Johansson held a jubilee lecture on the digitalisation of retail and Cecilia Fredriksson spoke about alternative and non-consumption at the Sustainability Day.

BREAKFAST SEMINAR

Jens Hultman presented research about new store formats at a breakfast seminar in Gothenburg. Michael O'Rourke, Physical Touchpoints Manager for IKEA Global, responded from an industry perspective. The breakfast seminar was arranged by HUI Research, the Swedish Retail and Wholesale Council and Gothenburg University's Centre for Retailing.



E-RETAIL'S LOGISTICAL CHALLENGES

At a popular workshop hosted by the Centre for Retail Research, practitioners enjoyed several presentations about the emergence of new business models and formats, as well as the challenges of storage and distribution in multi-channel retailing. Niklas Hamberg, head of logistics at Bygghuset, gave the participants an industrial perspective and explained how Bygghuset is working to develop its e-retail logistics.



LICENTIATE DEFENCE

Pernilla Dervik successfully defended her licentiate thesis, Exploring competence and learning behaviour in supply chain management. In her thesis, Pernilla mapped and analysed supply chain management competence in literature, and also identified the competence being used in practice. Pernilla's research was financed by the Centre for Retail Research.

ALMEDALEN

Ulf Johansson and Annika Olsson represented the Centre for Retail Research at Almedalen. Ulf Johansson moderated a panel discussion called Reason and feeling – what will the future of retail look like? Annika Olsson was live on Swedish Radio channel P1 from Almedalen's stage discussing whether packaging is a necessary evil.



INTERNATIONAL COLLABORATION

At the Centre, we value international collaboration and we have continued to develop our relationships with overseas researchers and institutes this year. Examples include Ulf Johansson and Jens Hultman's cooperation with Stirling University, and the participation of Matteo Montecchi (London College of Fashion), Ana Roncha (London College of Fashion), Alexis Mavromatis (EADA) and Jonathan Reynolds (Oxford University) at our workshops on the future of the physical store.

Workshops

In 2017, the Centre for Retail Research hosted three workshops in partnership with the Swedish Retail and Wholesale Council. Each focused on a different element of the physical store in the future: digitalisation, customer experience, and sustainability.

THE FUTURE STORE AND DIGITALISATION

Gamla Biskopshuset, Lund

It is widely acknowledged that, despite strong growth in e-retailing, the physical store will continue to be the place where most people shop for the foreseeable future. However, most people agree that the physical store needs to change, not least because customers now increasingly use their mobile phones while shopping. At this workshop, we talked about ways that retailers can increase the service content of physical stores, not just to stop customers shifting to online shopping channels but also to improve their customer orientation and digital capabilities. The workshop consisted of group discussions interspersed with presentations from Swedish and international experts.

"The workshop exceeded all my expectations. Everyone at my table found it really rewarding. The main thing I'll take away is that hard and soft factors are important for digitalisation. There are a lot of different solutions and strategies to choose from today. The challenge for retailers is to choose wisely. Instead of just copying others, they should digitalise from their own DNA."

David Anklew, business manager at Telia.



THE FUTURE STORE AND CUSTOMER EXPERIENCE

World Trade Centre, Stockholm

At our second workshop, in Stockholm, we repeated the successful format used in Lund. Short lectures were followed by small group discussions with facilitators. One conclusion from this workshop was that physical stores should create better



engagement with customers. Reimaging and innovating were themes that came up often. Some participants argued that, in the future, stores will be more like logistics hubs. Others suggested that stores will continue to exploit their five advantages – convenience, immediacy, experience, problem solving, and value creation – in order to create value. Retailers have traditionally been able to take advantage of location to draw customers but as e-retail becomes more important, successful physical stores will be increasingly customer-focused, rather than inward-looking.

THE FUTURE STORE AND SUSTAINABILITY

Mindpark, Helsingborg

The theme for the third workshop, led by Centre Coordinator Jens Hultman, was sustainability. The 50 participants got to discuss a variety of retail-specific sustainability issues including transportation, recycling, manufacturing, operations, sales, and communication. The production and transportation of goods to market accounts for a large part of the retail sector's environmental footprint. And while sustainability is a strategically important question for retail, it is not just a matter of consuming less, but of consuming the right products in the right way. Here, retail has an important role as a platform for change.

"The whole workshop series has been spot on for us," said Ylva Skoogh, who has participated in all three of the Future Store workshops. "Interesting speakers and great group discussions. Thank you letting us take part!" Ylva works as partner and strategy adviser at Integrate, a consulting firm that offers strategic advice in sustainable trade and tourism.



GENERAL THEMES

The Centre for Retail Research at Lund University is an interdisciplinary centre of excellence. In 2017, we focused on two overarching research themes: Retail Destination and Retail Innovation. Both are

strongly linked to our general focus on the flow of goods and interactions with customers – two crucial aspects of well-functioning and efficient retail.

Theme: Retail Destination

The starting point for the Retail Destination research programme is the relationship between retail and its location. A retail transaction represents the activation of a variety of different processes and actors and this programme focuses on themes such as start-up issues, store format, changing consumption patterns, logistics and city development. The relationship between retail and location is studied from different perspectives and the programme explores how the store, the high street, the town centre, the mall, the second-hand store and the city function as different destinations with their own challenges and possibilities. How can we understand and describe different shopping spaces? How can we explain the different circumstances and practices that are connected to particular retail destinations? How does a place become an attractive shopping destination?

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The researchers in this research group share an interest in how different retail locations are established and regularly present their work at scientific conferences as well as in the media. Our research takes the form of a number of studies that focus on different retail destinations from different perspectives. We work with studies on the attractiveness of cities, high streets and shopping centres; studies of consumers and service interaction in the physical store; studies of digital solutions to retail, location and logistical challenges; and studies that highlight different types of shopping locations.

Through our research into the oversupply of shopping locations and shopping centres, we have observed how older shopping centres try to survive by investing in updated design, shopping mix and redevelopment. Findings from ongoing studies show that there is a clear connection between heavy investment and sales growth, with the strongest effects for shopping centres in city centres. A similar study into Swedish city centres is currently underway.



Studies of the relationships between destination, digitalisation and other e-retail solutions have been boosted by the collection of transaction data that shows how urban and rural consumers shop online and how they choose between different delivery options. The next step is to combine this transaction data with demographic data in order to, for example, suggest good locations for parcel lockers. This year we also performed a quantitative mapping and measuring of the kinds of retail locations Swedish consumers visit over the course of a year. Here, we are especially interested in the relationship between traditional and alternative shopping spaces and also which practices are connected to which shopping locations.

The research group works in a range of constellations with a variety of qualitative and quantitative material in order to publish interdisciplinary journal articles. Many international articles have been published as well as an edited book, in which a number of the programme's researchers are co-authors. The book *Handelsstad i omvandling*, edited by Devrim Umud Aslan and Cecilia Fredriksson consists of 11 chapters that each illuminate a different aspect of retail in connection with city life, consumer culture and digitalisation. The contributions employ a range of methods and a variety of research material but their common aim is to illuminate the complexity of retail.

Cecilia Fredriksson

Theme: Retail Innovation



The Retail Innovation research programme was started because researchers – and practitioners – saw a need to understand how the retail sector would meet the challenges of digitalisation. How will deliveries and returns work in practice? What happens when Black Friday meets White Monday or Green Friday? And how will retailers adapt to consumers' changing habits?

"It is extremely important to use customer-facing employees' knowledge about innovation in a structured way."

Within the Retail Innovation research theme, we have studied how retail works with innovation and change on a strategic and organisational level. We have also examined how to manage innovation and change on the shop floor. Current research themes include innovation capability; innovation management; payment solutions; sustainability communication and implementation; and the consumer's role in innovation. Preliminary results show that, even if the term innovation is not widely used, and it is not always clear who is responsible for it, the retail sector actually has a good capacity for innovation. We see customer-facing staff as being a critical resource for innovation. Nevertheless, there is little current research on the role of customer-facing staff and the sector does not effectively use the insights that are generated in the numerous customer interactions in every store. It is extremely important to use customer-facing employees' knowledge about innovation in a structured way. It is also clear that knowledge and



strategies created by leadership are not always realised by customer-facing staff. In other words, there is a communicative difficulty in operationalising management strategies on the shop floor.

A related issue is the idea of organising for innovation. We have seen that organisations often have trouble handling the combination of structure and flexibility called for in innovation literature. There is either a lot of structure and little flexibility or a lot of flexibility, with everyone taking part when they can, but with very little structure. It is challenging for both centralised and decentralised organisations to organise in such a way as to capture possibilities for innovation.

The Retail Innovation research group is made up of researchers and doctoral students with different backgrounds and skills. They come from the Department of Design Sciences at Lund University's Faculty of Engineering (LTH), the Department of Business Administration at Lund University's School of Economics and Management (LUSEM), and the Department of Service Management at Campus Helsingborg. Thanks to this interdisciplinary composition we can understand and illuminate retail from different perspectives. We have also collaborated with various retail actors and are happy to see them start to make changes and reflect about their own operations as a result of our research findings.

Annika Olsson och Ulf Johansson



SALE

H&M

SALE
UP TO
70%
OFF

MID
SEASON

SALE
H&M

The transformation of our town centres



Cecilia Fredriksson and Devrim Umut Aslan.

Cecilia Fredriksson, Professor at the Centre for Retail Research, and doctoral student Devrim Umut Aslan edited a book entitled *Handelsstad i förvandling*, which was released in late 2017. Several researchers from Lund University authored chapters in the book and Cecilia Fredriksson hopes that the book will also be accessible to non-academic readers. "There are a multitude of actors that influence retail today. Apart from consumers and merchants, we see property developers, town planners and business developers from local government playing a big role in retail development. I am sure that they will also find the research in this book extremely useful."

One of the book's subjects is how retail is embodied. In other words, what kind of retail do we meet when we come to a particular location? Which shops and other kinds of retail spaces do we have access to? "This is not something that happens randomly. There are different agendas, cultures and ways of thinking that affect this embodiment." The various actors within the retail sector may often have different interests that affect how retail develops. "When we create an awareness about this, it is easier to find models for cooperation. And that is one of the aims of our research."

Cecilia points out that retail has a very important role in society today. "It is not just a question of exchanging money and products. Retail is also – and has always been – a meeting place for people. Retail can promote community but it can also serve to divide groups of people from one another. It can contribute to segregation or integration," she explains.

One of the most important change in recent years relates to shopping centres. The appearance and growth of shopping centres has changed how and where we shop. "Clearly, it has changed how we move around when we shop. And this has had knock-on effects for town centres." The obvious consequence is that town centre shops lose custom to shopping centres. But this is not the full story. Town centre shopping

can also be seen as an alternative to shopping centres. "This has the potential to lead to polarisation because it is lifestyle boutiques rather than grocery stores that tend to set up in town centres. We need to think tactically about town centre shopping rather than just focusing on aesthetics and trying to create a pleasing shopping experience. Retail mix is very important to the health and diversity of the town centre."

Another point highlighted in the book is how retail can affect a town's geography; in other words, what the city actually looks like. "Long-term, strategic thinking is needed when planning town centre shopping areas. Some councils are carrying out strategic studies but more collaboration would definitely be beneficial."

"It is clearly a challenge to be able to meet each customer's expectations, especially when those expectations are becoming more and more individualised."

One other factor that has serious repercussions for town centre shopping is the fact that consumer culture is changing a lot. "Consumers have higher demands regarding transparency as they become more knowledgeable and enlightened. Ethical considerations are important for many customers, which means they make high demands regarding transparency from retailers and suppliers." Furthermore, technical advances impact the retail sector quite strongly, especially those related to customer mobility. "It is clearly a challenge to be able to meet each customer's expectations, especially when those expectations are becoming more and more individualised."

Perhaps the biggest challenge for retailers, when it comes to consumer behaviour, is the anti-consumption trend. A number of consumers don't want to consume at all, explains Cecilia. "It is, of course, difficult to prepare for every possible new behaviour or demand but retailers should be prepared to augment their product selection with a range of different services", she says.

People at the Centre

MANAGEMENT GROUP

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ULF JOHANSSON	PROFESSOR, SCHOOL OF ECONOMICS AND MANAGEMENT, CENTRE DIRECTOR
ANNIKA OLSSON	PROFESSOR, FACULTY OF ENGINEERING (LTH)



The management group, from the left: Annika Olsson, Cecilia Fredriksson, Ulf Johansson and Jens Hultman.

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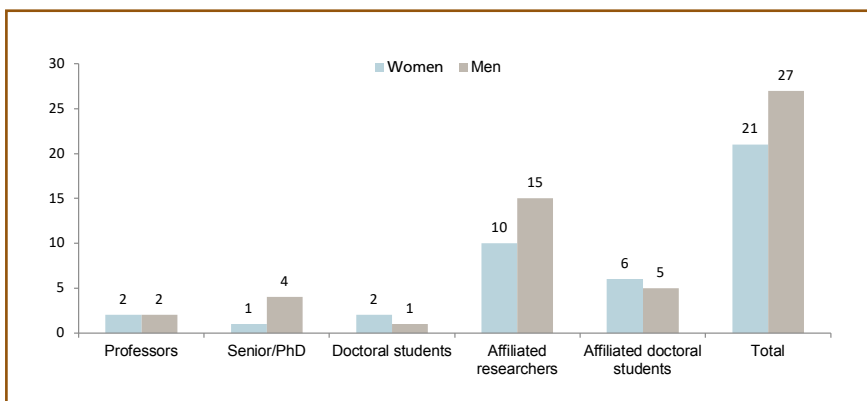
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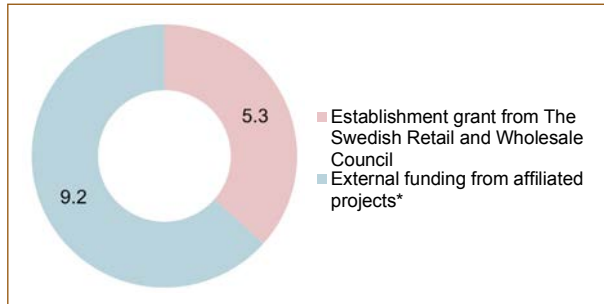
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Funding

RESEARCH GRANTS AT THE CENTRE FOR RETAIL RESEARCH AT LUND UNIVERSITY (MSEK)



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Popular science publications and visibility in the media – a selection

Event and brand building – could that be something?	Scania's Trade Council, Malmö	January	Ulf Johansson
Malmö stories and breaking points	Malmö Business Gala 2017, Malmö	February	Sofia Ulver
The mobile phone as a shopping companion	Centre for Retail Research at Lund University	February	Christian Fuentes
Customer returns	E-retail's logistical challenges workshop, IKDC Lund	March	Daniel Hellström, Pejvak Oghazi, Klas Hjort, Stefan Karlsson
E-retail – summing up and looking forward	E-retail's logistical challenges workshop, IKDC Lund	March	Ulf Johansson
Sustainable consumption between needs and creativity	Style Conscious at the Regional Museum, Kristianstad	April	Cecilia Fredriksson
Sustainable consumption: Understanding and changing households' habits	Helsingborg City	April	Christian Fuentes
Experiences in the physical: Retailer versus consumer perspectives 2006-2016	HUI, Gothenburg	April	Kristina Bäckström
Organic goods are more expensive than conventional - but is it more expensive to be an organic consumer?	Ecology and Business	April	Jonas Nordström
On sustainability, non-consumption and alternative consumption	Lund University's 350th anniversary celebrations	May	Cecilia Fredriksson
Managing packaging design for sustainable development	Packbridge Research Forum, Malmö	May	Daniel Hellström
From Consumer to Activist	AdDay 2017, Stockholm	May	Sofia Ulver
New rules for the sale of plastic bags in stores	Sydsvenskan and Helsingborg Daily	June	Jens Hultman
It's just like milk, but different!	Blog, Journal of Marketing Management	June	Christian Fuentes
Mobile shopping for those of us who are stressed	Gothenburg Post	July	Christian Fuentes
Packaging – a necessary evil?	Almedalen	July	Marcus Klasson, Annika Olsson
What does the future of retail look like?	Almedalen	July	Ulf Johansson
The retail of the future	Bjuv and Trelleborg library	September	Ulf Johansson
Key Note: Omni-channel and material handling	Consafe Logistics Annual Customer Conference	September	Andreas Norrman
Package lockers in rural areas	Swedish Agency for Economic and Regional Growth, Stockholm	September	Klas Hjort
Research of use to the retail sector	Swedish Retail and Wholesale Council, Stockholm	October	Stefan Karlsson and Daniel Hellström
Book release: Handelsstad i förvandling	The Breakfast Club – Marketing Association of Helsingborg	October	Devrim Umut Aslan and Cecilia Fredriksson
Customer returns	D-Fokus Logistics, Swedish Digital Retail, Borås	October	Klas Hjort and Daniel Hellström
The Art of Selling Sustainable Food	Grocery Forum 2017, Malmö	October	Sofia Ulver
The digitalisation of retail	Swedish Retail and Wholesale Council, Malmö	November	Jens Hultman
Where will retail take place in the future?	Grocery Academy, Ventil, Malmö	November	Ulf Johansson
Record sales – despite climate warnings	North-West Scania Newspapers	November	Christian Fuentes
E-retail from China	Swedish Radio P1 Morning	December	Jens Hultman
Shopping with the heart – cultural perspectives on alternative shopping locations	Cultural history seminar, Department of Arts and Cultural Sciences	December	Cecilia Fredriksson
Shopping in Söder is like a travelling back in time	Helsingborg Daily	December	Devrim Umut Aslan

Publications

JOURNAL ARTICLES

Anselmsson, J, Burt, S, Tunca, B (2017) **An Integrated Retailer Image and Brand Equity Framework: Re-examining, Extending, and Restructuring Retailer Brand Equity.** Journal of Retailing and Consumer Services, 38, 194-203

Anselmsson, J, Tunca, B (2017) **Exciting on Facebook or competent in the newspaper?: Media effects on consumers' perceptions of brands in the fashion category.** Journal of Marketing Communications, 1-18

Anselmsson, J, Tunca, B (2017) **An Integrated Retailer Image and Brand Equity Framework: Re-examining, Extending, and Restructuring Retailer Brand Equity.** Journal of Retailing and Consumer Services, 38, 194-203.

Bäckström, K, Johansson, U (2017) **An exploration of consumers' experiences in physical stores: Comparing consumers' and retailers' perspectives in past and present time.** The International Review of Retail, Distribution and Consumer Research, 27, 3, 241-259

Interestingly, our results suggest that consumers' in-store experiences to a large extent are created by the same aspects today as ten years ago (e.g. personnel, layout, atmosphere).

Bäckström, K & Johansson, U (2017) An exploration of consumers' experiences in physical stores: Comparing consumers' and retailers' perspectives in past and present time. The International Review of Retail, Distribution and Consumer Research, 27, 3, 241-259

Burt, S, Johansson, U, Dawson, J (2017) **Dissecting Embeddedness in International Retailing.** Journal of Economic Geography, 17, 685-707

Denver, S, Nordström, J, Christensen, T (2017) **Der er lidt dyrere at være en økologisk forbruger – men ikke kun på grund af merpriserne.** Tidsskrift for Landøkonomi, 203, 47-54

Derwik, P, Hellström, D (2017) **Competence in supply chain management: A systematic review.** Supply Chain Management: An International Journal, 22, 2, 200-218

Fuentes, C, Fuentes, M (2017) **Making a Market for Alternatives: Marketing devices and the qualification of a vegan milk substitute.** Journal of Marketing Management, 33, 7-8, 529-555

Fuentes, C, Svingstedt, A (2017) **Mobile Phones and the Practice of Shopping: A study of how young adults use smartphones to shop.** Journal of Retail and Consumer Services, 38, 3, 136-146

Fuentes, C, Bäckström, K, Svingstedt, A (2017) **Smartphones and the Reconfiguration of Retailscapes: Stores, Shopping, and Digitalization.** Journal of Retail and Consumer Services, 39, 270-278

Gidlöf, K, Anikin, A, Lingonblad, M, Wallin, A (2017) **Looking is buying. How visual attention and choice are affected by consumer preferences and properties of the supermarket shelf.** Appetite, 116, 29-38

As markets change and there is a need for growth by attracting new customers, format development will probably emerge as the new battle ground for many single-format retailers.

Hultman, J, Johansson, U, Wispeler, A, Wolf, L (2017) Exploring store format development and its influence on store image and store clientele – the case of IKEA's development of an inner-city store format. The International Review of Retail, Distribution and Consumer Research, 27, 3, 227-240

Hulthén, H, Näslund, D, Norrman, A (2017) **Challenges of Measuring Performance of the Sales and Operations Planning Process.** Operations and Supply Chain Management: An International Journal, 10, 1, 4-16

Hultman, J, Johansson, U, Wispeler, A, Wolf, L (2017) **Exploring store format development and its influence on store image and store clientele – the case of IKEA's development of an inner-city store format.** The International Review of Retail, Distribution and Consumer Research, 27, 3, 227-240

Lorenzini, G, Mostaghel, R, Hellström, D **Drivers of pharmaceutical packaging innovation: A customer-supplier relationship case study.** Journal of Business Research (forthcoming)

Sternberg, H, Norrman, A (2017) **The physical internet – review, analysis and future research agenda.** International Journal of Physical Distribution and Logistics Management, 47, 8, 736-762

Stål, H, Jansson, J (2017) **Sustainable Consumption and Value Propositions: Exploring Product-Service System Practices Among Swedish Fashion Firms.** Sustainable Development, 25, 6, 546-558

Vakulenko, Y, Hellström, D, Hjort, K **What's in the parcel locker? Exploring customer value in e-commerce last mile delivery.** Journal of Business Research (forthcoming)

Zhao, C, Johansson, M, He, M (2017) **Data Mining with Clustering Algorithms to Reduce Packaging Costs: A Case Study.** Packaging Technology and Science, 30, 5, 173-193

CONFERENCE ARTICLES AND ABSTRACTS

Anselmsson, J (2017) **Välkomna till årets KEFU-dag**. KEFU-dagen 2017, 13 juni, Lund, Sverige

Anselmsson, J, Westerdahl, S, Öhman, P, Öberg, M (2017) **Dåliga affärer? Om innerstadshandeln och företagsökonomi**. Föreningen Företagsökonomi i Sverige (FEKIS) konferens, 18 november, Malmö, Sverige

Cerne, A, Elg, U (2017) **Institutional logics shaping corporate social responsibility in retailers - supplier relationships on emerging markets**. European Association for Education and Research in Commercial Distribution (EAERCD), 4-6 juli, Dublin, Irland

Fredriksson, C, Aslan, D (2017) **Managing green consumers**. Société Internationale d'Ethnologie et de Folklore (SIEF) Congress, mars, Göttingen, Tyskland

Gidlöf, K, Nyström, M, Wallin, A (2017) **The influence of top-down and bottom-up factors on visual attention throughout the consumer decision making process**. European Group of Process Tracing Studies (EGPROC), 22-24 juni, Galway, Irland

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