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Geography and the retail industry

A literature review with a special focus on Sweden

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Contents

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1. Introduction

The changing nature of the retail industry is something that has been widely studied during the last few decades. On a more general level, these changes have involved, on the one hand, despite recent economic crises, a rapid expansion and growth of the retail industry, increased market entries and representation of transnational retail chain stores, and a growing interest in consumer behaviour and awareness. On the other hand, these changes also show clear spatial characteristics pointing to the importance of not only location, but also a wider geographical understanding of what, how and where these changes are taking place. This has come not least to involve numerous studies trying to understand the complex spatial nature of production/commodity chains of goods and services as well as the embeddedness of local and global networks of stores and retailers, but it has also generated inputs to a seemingly never-ending debate concerning the relocation of retail activities – foremost from inner-city, or high-street, locations to external retail establishments.

In the Swedish media, this debate has come to focus on the availability of, and accessibility to, retail and services. This would typically involve discussions concerning the demise or impoverishment of the inner city, the closing down of rural or country stores, or an overall diminishing supply of necessary services. Besides a few governmental reports, the geography of changing retail conditions concerning the above is not a widely studied topic however. As Sweden is a sparsely populated country, it is not farfetched as to assume that these are important questions, especially when and if the availability of and accessibility of retail opportunities are being jeopardized. Thus, the purpose of the literature review at hand is to provide a general overview of the characteristics of and recent progress in the retail industry, and to give a short account of developments in Sweden.

Although modern consumption has its roots in larger metropolitan areas, such as London, Paris, and New York, many of the influences and innovations in retail after the Second World War have their origins in the US. This marks a directionality of influences spreading from the US to the UK and on to the rest of Europe. Most of the literature on retail has an Anglo-Saxon focus, which of course may skew the description of industry and its developments. It should therefore be duly noted that some markets, such as those in France, Germany and Belgium, have their own characteristics and have been early adaptors of certain trends and types of retail outlets, such as the hypermarket. Nevertheless, from a Swedish perspective, it may be argued that the Swedish retail industry has been heavily influenced by its Anglo-Saxon counterparts, which also would explain and reaffirm the selection of literature in this review. It is also clear that the Swedish retail industry, as in many other western countries, has been influenced by the internationalization of transnational retail chains investing in and entering the Swedish markets by locating in expanding retail spaces foremost on the urban fringes. Here we find retail chains originating from, for example, Germany (Lidl, Media Markt, BAUHAUS), Norway (El-Giganten, Plantagen, XXL, Dressman, etc), Finland (K-Rauta) and Denmark (Jysk, Netto, etc.).

Recent studies of the retail industry, especially more quantitative studies, have come to focus on productivity; market entry and exit; competition/composition effects; planning regulations; the importance and effects of information and communications technology; internationalization of the TNC; labour relations and workforce skills; and network embeddedness and knowledge transfer. In the following sections, a literature review spanning both quantitative and qualitative literature focusing on factors shaping conditions and driving changes in the retail industry will be presented in terms of the classic questions of what, how, and where?

2. What has changed? Developments related to store formats, consumption and the search for new (international) markets

A most visible change in the last decades, not only in the west but also in new emerging retail markets in Asia, South America and in former Eastern European countries, is an increased land-use and utilization of physical space devoted to consumption. This is also reflected in a growing body of literature focusing on the importance of space, place and location, not least in economic geography, for understanding the interconnectedness between consumption and the built environment. Thus, consumption is closely related to geography, and as such has taken place in various spaces and in different forms, e.g. in the market place, high street, department store, shopping mall, shopping district, commercial town, etc. and has over time become an integral part of the urban landscape (cf. Miller et al. 1998, Zukin 1998, Crewe 2000, Wrigley and Lowe 2002, Zukin 2004, Mansvelt 2005). As noted, these spaces and their importance have varied over time.

2.1 New store formats and structural changes in retail

The way we consume is to a large extent dependent upon how and where goods and services are made available and presented. This implies that consumer culture is influenced by and intertwined with the evolution of different store formats and their locations. From a historical perspective, the contemporary retail industry emerged and evolved in Paris, New York, London and other world cities in the late 19th century. Driven by changing attitudes towards consumption practices of a more leisurely character, such as strolling, browsing, and shopping, new spaces for consumption arose to attract people and customers, e.g. department stores, gallerias, and arcades (cf. Walter Benjamin's lifelong Arcades Project depicting Parisian city life in the 19th century and Baudelaire's thoughts on the lifestyle of the flâneur). Combined with architectural achievements during the period, customers were attracted to these new spaces by the use of novel construction materials and technologies allowing for progressive architectural expressions and visions using plate glass, cast iron, steel and electric light of differing colour. These places were described and depicted as "cathedrals of consumption", and as such became synonymous with the social and cultural changes stimulated by the growth of the modern market economy (Zukin 1998, Wrigley and Lowe 2002).

In the US, the department store concept was challenged by the 'supermarket' format in the 20th century, which was based on large, self-service food stores. In the UK, however, large format food retailing was first evident in the 1960s and early 1970s. With the economic progress following the Second World War, the car became a popular good and mode of transportation, which in turn came to change current planning paradigms. The planning focus shifted from the inner city to the suburbs. New sites of consumption were located near major traffic routes and communication junctions in relation to newly built residential areas in the outskirts of the city. New residential and mobility patterns opened up for the development of the 'superstores' and 'supercentres' in the 1980s. These were even larger self-service stores providing a wide range of food and other related items, but foremost supported by extensive car parking (Zukin 1998, Wrigley and Lowe 2002). In the UK, the rapid expansion of superstores led to intense competition – an era described as 'the store wars'. In other European countries, such as France, Germany, and Spain, the development was even more extreme as these consumption spaces took form as 'hypermarkets'. In the US, the super store and the discount mass merchandise store, such as Kmart, Walmart, and Target, merged into even bigger so-called supercenters (see table 1 for a typology of different store formats). The idea was based on increased frequencies of consumer visits generated by food shopping spilling over to non-food products, so-called cross-shopping (Wrigley and Lowe 2002).

Table 1. Retail formats and their definitions, examples from Australia.

Format	Key characteristics
Supermarket	Floor space area 1000 m^2; floor space allocations of 75% for 'food, liquor and tobacco' and 25% for non-food goods; ratio of part-time to full-time workers: >1.0.
Discount department store	Floor space area 3000 m^2.; floor space allocations of 75% for non-food goods that may be transported by trolley and 25% for food and other goods.
Hypermarket	Floor space area 3000 m^2; floor space allocations of 75% for 'food, liquor and tobacco' and 25% for non-food goods.
Bulky goods	Floor space area 2000 m^2; floor space allocations of 75% for non-food goods that cannot be transported by supermarket trolley and 25% for other non-food goods (e.g. appliances) i.e. no trade in 'food, liquor and tobacco'; ratio of full-time to part-time workers: >2.0.
Planned shopping centre	Floor space area 3000 m^2 (in the UK this figure is 4650 m^2; integration of multiple stores under one management, including at least one major anchor store and enclosed parking.
Neighbourhood centre	Floor space area = the largest competing supermarket in the area (the 'floor space parity argument for neighbourhood centres'); mixture of retail and community service functions.
Central business district	Maximum overall accessibility to most parts of the urban area; focus of transport networks and people movement; maximum land-values in the area from competition of commercial interests; strong functional links between shops and office locations; sometimes marked by vertical expansion; supported by parking facilities and restrictions.

Source: Baker and Wood (2010). Slightly altered.

Overall, the retail industry saw a rapid expansion of stores and chains during the 1980s. This became known as the 'retail revolution', which marked a shift in investment focus and economic growth from manufacturing industries to more service-oriented industries. Characteristic of the development was the many mergers and acquisitions taking place within the industry, resulting in the mega-chain becoming a popular form of retail corporation. The mega-chain normally contained a number of different department stores and chains still operating under their own trading names, or fascias, but owned by a few larger actors (such as in the US where Macy's, Bloomingdale's, Lord and Taylor, Filene's, Hecht's became divisions of Federated, May or Proffitt's; see Wrigley and Lowe 2002). For instance, today in Sweden clothing stores and brands such as Tiger of Sweden, Peak Performance, By Malene Birger, Companys, Part Two, InWear, etc. are owned by the Danish firm IC Companys.

Of course, the utilization of space devoted to commercial activities could also be discussed in relation to public space. Some would argue that the retail spaces, as they grow larger (within the city and outside), tend to territorialize space and in turn influence public life in different ways – both positively (e.g. supply, socializing opportunities, etc.) and negatively (e.g. displacement, social control, and exclusion). As Kärrholm (2009) notes, the commercialization of public space is also about temporal control, where space is synchronized with time into, for example, flows of people regulated and controlled by opening hours and the frames of the built environment. Retail, in its spatial and physical form, is thus closely connected to how, when and where consumption takes place.

2.2 Consumption and consumer awareness

As previously noted and in the context of the modern society, consumption is an integrated part of the city and the urban life style. In the words of Zukin and Maguire (2004: 173), today:

> "an increasing part of public culture is shaped by goods and services, advertisements that promote their use, and places – from shopping malls and websites to fitness centers and museum gift shops – where they are displayed, viewed, and bought."

In the consumer society, highlighting the shift from manufacturing to services, the interconnectedness between production and consumption is exemplified by Ritzer's (1996) seminal work on and standardization of consumption and the 'McDonaldization' of the society, where production and consumption are rationalized, streamlined, and controlled; Frank (1997), studying consumer desire and the urge to be 'hip' and 'cool'; Zukin (2004), writing on the tangent subject of consumer-related self-definition and social status; Callon et al. (2002), proposing that the consumer makes associations to a product by processes of attachment and detachment based on both socio-cognitive arrangement and real experiences; Larson et al. (2005) studying the micro-geographies of store environments and how individual consumers use and behave in different retail spaces using RFID (radio frequency identification) tags, while the study of Jackson et al. (2006) considers consumer choices between and in stores on a neighbourhood and household level.

Many studies have also come to examine the role of brands and branding, where consumer loyalty to specific brands is regarded as a central aspect built on trust, experiences, emotions, and history (Fournier 1998, Power and Hauge 2008). Liu and Wang (2008) also show that promoted brands and private labels (store labels) attract different customers based on store image and differing psychogeographics (like self-perception, prestige, and status). Likewise, Anselmsson and Johansson (2009) study how retailer brands in the grocery sector affect innovativeness, while Smith and Sparks (2009) investigate loyalty schemes of retailers and reward redemption behaviour among consumers.

In relation to geography and as regards the above, the branding process may also provide urban planners and architects with the opportunity to associate the built environment and architecture to specific identities and brands. This is not least evident in the creation of flagship or concept stores in prime locations where fashion in general, and the designer brand in particular, is coupled with progressive architectural design outlined by so-called 'archistars' (Crewe 2010). The spatial embeddedness of products and how place is reflected in the branding and selling of products is also discussed by Molotch (2002, 2003), who poses the simple, yet intriguing, question of where 'stuff' comes from.

2.3 Industry growth, the TNC and global production networks

While Wrigley and Lowe (2002) point to both natural, or organic, growth and mergers and acquisitions as major drivers for the expansion of the industry during the 1980s and 1990s, other studies have come to focus on production and what causes expansion, i.e. entry, and exit in the industry. In this respect, sunk cost (cf. Eaton and Lipsey 1980, David 1985, Clark and Wrigley 1997) is shown to cause corporate lock-in effects, and as such function as barriers to both exit and entry. According to Daunfeldt et al. (2006), in Sweden new retail firms enter local markets where there has been recent or previous entry activity, where returns are high, and the sunk costs are low. Moreover, the entry of retail firms is also more frequent in regions with access to well-educated workers. Wholesale, on the other hand, is not equally reliant on sunk costs (see also Rudholm 2011), and in terms of exit, they show that there is a positive correlation between firm growth and relocation of wholesale firms: i.e. if there is no room for expansion, the firm tends to relocate elsewhere. While Rudholm (2011) show that market size of municipalities has a positive effect on firm growth in the retail and wholesale industries in Sweden, Daunfeldt et al. (2013) indicate that firm growth is determined by firm specific effects that are not easily measured using available public data, e.g. firm culture, brand loyalty, or internal resources such as entrepreneurial and employee skills. In this respect, Griffith et al. (2003) point out that productivity in national retail markets is influenced by differences in management strategies, workforce skill levels, the market composition and its competitive nature, use and adaption of information and communication technologies, and not least land regulation and planning policies.

Despite national differences, since the 1980s and 1990s there has been a growing trend of retail mergers and acquisitions taking place across national borders, creating a wave of internationalizations (see Godley and Fletcher 2001). While the number of direct investments related to the retail industry has increased, especially since the mid-1990s, so has the trend of consolidating capital into a growing number of transnational corporations. As Higón et al. (2010: 206-207) writes:

> "At the same time that a number of retail multinationals have risen up the ranks of the largest corporations in the world, a growing number of large retailers have widened their geographical scope of activity beyond national markets."

This expansion occurred in Latin America, South East Asia, Central/Eastern Europe, and Southern Europe and mainly was driven by 15-20 larger retail chains, such as Carrefour/Promodès, Ahold, Groupe Casino, Delhaize, Walmart, and Tesco (Wrigley 2000).

However, entering new national markets is often complex. For instance, Lowe and Wrigley (2010) study the internationalization of a major transnational retail chain and its entry into a new national market by focusing on three processes described as transference, splicing, and enhanced imitation, i.e. processes that are dependent on 'continuous morphing' (see also Rindova and Kotha 2001), meaning that organizations continuously have to transform and adapt organizational structures, routines, and capabilities in order to stay competitive. In retail, when entering new markets, it is thus important to be able to understand the territorial and network embeddedness of the host market. Operating in foreign markets is costly, and in order to compensate for this the firm must draw on and utilize firm-specific advantages, such as management expertise, technological capabilities, or specific employee knowledge bases.

The competitive advantage of the TNCs could be summarized as five central capabilities, according to Wrigley (2000): being able to utilize well-developed logistics and distribution systems; having knowledge of IT systems and supply-chain management; having access to low-cost capital funding expansion strategies; being able to transfer 'best practice' using the established corporate structure and experiences; and having access to a wide range of international management experience. However, different (international) markets may require a diverse set of strategies and knowledge bases for corporations to enter and succeed in. In economic geography these TNCs have been studied through a relational network approach (see Dicken et al. 2001, Boggs and Rantisi 2003, Yeung 2005), where they are viewed as 'necessarily embedded' (often territorially) and 'essentially networked', meaning that firms entering new international markets must possess specific knowledge about local consumption cultures, real estate markets and preferences, planning and land-use regulations, and supply systems and networks. Lowe and Wrigley (2009: 332) exemplify this with the US market, which they point out is:

> "an extremely problematic market for retailers to enter – due in large part to differing cultural norms with regard to supermarket shopping (in particular the dominance of branded as opposed to own label products)".

However, they also note that two of the world-leading transnational retail firms, Walmart (US) and Carrefour (France), failed to expand in South Korea, being forced to exit in 2006. Tesco (UK), on the other hand, was more successful and expanded rapidly due to investments in and commitment to territorial embeddedness and continuous morphing (Lowe and Wrigley 2010). Continuous morphing is thus about:

> "Learning to overcome those challenges and to operate large and dispersed store and sourcing networks across a range of international markets with differing institutional, cultural, and regulatory characteristics transforms retail firms that commit themselves to that path" (Lowe and Wrigley 2010: 403).

In retail it is thus not only important to commit to and understand place or market specific conditions and tap into locally embedded networks, but also to understand retail and supply relations across firms, markets, and borders. Numerous studies have come to focus on the geography of global commodity chains or production networks, i.e. elaborate worldwide networks of e.g. producers, suppliers, distributers, wholesalers, retailers, users, and consumers (e.g. Gereffi 1999, Dicken et al. 2001, Coe et al. 2008). In retail studies, this has been highlighted by, for example, Roseberry (1996) and Naylor (2000), who recognized a divide and power relations between a producing southern and a consuming northern hemisphere connected by elaborate commodity chains and consumer networks; du Gay et al. (1997), studying consumer behaviour as a cultural circuit joining commodity chains in an interplay between consumers and producers; and Hughes et al. (2008) discussing the role of ethical consumption and campaigning and the ability to shape and reorganize power relations of global production networks.

3. How? Regulation, innovation, and labour relations

The consumer society is to a large extent shaped by a number of innovations: for example related to the car-oriented society, mass production, mass consumption and mass distribution, ICT, construction material and methods, and more 'organizational' innovations associated to the western welfare society (cf. Schudson 1984, Mintz 1985, Jörnmark 1998). In relation to the retail industry, much of the expansion of the industry after the 1980s, is directly related to a number of innovations in distribution, marketing, organisation, and information technologies conditioning for example product supply, availability, transportation, and labour relations. Although most of these innovations affect places all over the world, they are nevertheless conditioned or influenced by a number of laws and regulations, be they local, regional, national, or supranational.

3.1 Regulating and planning retail

As most other industries requiring access to larger physical spaces and land use, actors in the retail industry have to comply with regulations, frameworks, laws, and standards governed by both public and private parties. This could for instance be expressed in where and how retail facilities are planned or built, regulations concerning retail trading and opening hours or food and safety standards, and the regulation of competition.

Regulations, laws and practices may of course differ between nations. Several studies have also focused on how strategies implemented by governments (local and national) and planning authorities, which have the overall responsibility for the supply of goods, affect the spatial distribution of retail and its geographic impact (see for instance Forsberg 1995a, Guy and Bennison 2007, van der Krabben 2009).

During the latest few decades, the developments of the industry have been spurred or influenced by globalisation, free trade agreements, and neoliberal ideologies. According to Wrigley and Lowe (2002) competition and private interests caused a wave of de- and reregulations affecting the retail industry across the globe during the 1980s.

The rapid growth of retail and retail spaces in many western countries in the mid-1990s has spawned a development of retail investments in out-of-town locations or on the fringes of the urban areas, causing a perceived or feared decline of activities and vitality in the inner city. In Australia, for instance, Baker and Wood (2010) point to deregulated shopping hours, increased mobility levels, and the growing popularity of regional planned shopping centres as important factors changing central conditions for the retail industry, its outputs, and consumer visits. This has taken a severe toll on the survival of main street retailing. To remedy or counteract this development, several countries have set up or revised a number of regulatory measures and laws, giving local and national authorities greater control over the expansion of the sector, such as Loi Rafferin in France, Ley de Ordenancio del Commercio in Spain and Planning Policy Statement 6: Planning for Town Centres (Department for Communities and Local Government, 2005) in the UK (Wrigley 2000, Baker and Wood 2010). The latter was set up in order to improve, protect, and promote high streets and existing town shopping, business, and leisure areas. By contrast, in Sweden the location and planning of retail is regulated and controlled by the local planning authority in each municipality, which in turn is obliged to follow the national Planning and Building Act, dealing with the physical and spatial planning of the use of land, water, and the built environment. Since this is entrusted to and handled by over 290 municipalities, a general outline of strategies dealing with the planning of retail areas and potential impacts across regions is not easily generated (see Forsberg 1995b).

Another problem is to create common understandings between governmental agencies and stakeholders (e.g. regulatory actors, planners, retailers, property managers, etc.). In order to combine the interests of these actors, it is necessary, according to Baker and Wood (2010), to base communication on a common language concerning retail formats, which would include coherent, comprehensive, and legally viable definitions. Thus, definitions and strategies provided by proper planning authorities are crucial for assessing and evaluating geographic impact and/or outcomes. However, according to Wood and Reynolds (2012), lack of communication is also evident within the retail firm itself as there often exists an information gap between location planners and store development departments, on the one hand, and the marketing management, on the other. They conclude that geographic information and location research was seldom applied in developing new marketing strategies of UK retail firms.

3.2 Retail innovations and marketing strategies

The retail industry has been greatly shaped by innovations in distribution, marketing, organisation, and information technologies. According to Wrigley and Lowe (2002), major contributions to this development were a growing ability of retailers to manage and control supply relations in-house, thus enabling to meet supply and demand conditions using more interactive, flexible, and stable supply networks. This meant that the power relations regarding the distribution channels now shifted from manufacturers to retailers, where many retailers established their own centralised distribution systems under their own names.

Within the industry, the growing popularity of the discount stores (such as Walmart, Kmart, and Target) during the 1960s and 1970s, called for new ways to attract and keep customers. To compete with the discount stores, many of the major food retailers introduced their own ranges of low-price labels described as ‘value’ or ‘economy’ labels. However, in the late 1980s these were to a large extent transformed into ranges of own-label products with a greater focus on high quality, thus repositioning the own-label products as commercially attractive retail brands (se also Sparks 1997). Another way to compete and attract customers in the mid-1990s was to introduce customer loyalty, or reward, cards. This was facilitated by innovations in information technologies making it easier to gather, store, and analyse customer information and preferences as well as to control stock levels and automating communications within the distribution networks. These so-called EPOS (electric point of sales) had been introduced in the 1980s, but constant refinements in the system greatly benefited logistics, client profiling, and data mining – not least in terms of geographic information and catchment areas. From a geographical point of view, and as Higón et al. (2010) argues, these technologies have created opportunities to handle codified knowledge of a localized character otherwise hard to assess.

However, perhaps the biggest impact in the industry was the new opportunities to source, market, and sell products facilitated by technological advances in ICT. By the end of the 1990s, the brick-and-mortar store met new competition from actors redirecting consumer interest toward e-commerce. New electronic channels for offering, distributing, and searching for products via the Internet made it possible for consumers to invite the retail industry into their homes. According to Brynjolfsson et al. (2009), in comparison with the traditional store, the Internet retailer is far more competitive when providing niche products than when offering popular or mainstream products normally also found in the physical stores. The reason for this is that the Internet retailer can carry a wider selection of searchable products while offering web-based search tools, evaluation systems, and browsing functions such as easy comparisons. In general, information technologies and electronic markets have not only lowered search costs, but have also contributed to lower prices through wider competition and improved product variety.

3.3 Labour relations and employment structures in retail

As Wrigley and Lowe (2002) note, the retail industry is labour-intensive, with the cost of labour representing the second largest expense in the retail firm besides purchasing costs. While the organisation of many of the new store formats developed during the last few decades (such as the supermarket, superstore, hypermarket etc.) have focused on saving costs related to economies of scale, labour costs have also been reduced by introducing the customer to more elaborate and frequent self-service opportunities (cf. the IKEA concept). According to du Gay (1996), this has led to a deskilling of retail workers, with them undertaking more repetitive and routine-based job assignments. Lowering the skills of the labour tasks also meant opportunities for management to source less skilled and less paid labour. However, for example due to larger and more complex organisations and operations, typically involving innovations in ICT and logistics, there was also a growing demand for more skilled managers, creating a duality in the workforce – a primary and secondary labour force, characterised by a core (central line or store managers, head office professionals in finance, personnel, purchasing, marketing, estates, research, etc.) and a secondary group of low-paid workers, predominantly female, and/or young workers working part-time (see Wrigley and Lowe 2002, Higón et al. 2010).

Higón et al. (2010) also note that the quality and skills of the retail workforce to some degree is conditioned by the local labour market, but most importantly by cultural differences. For instance, in France, high levels of detailed technical and product knowledge among store employees is expected, while in Germany, the employee is required to be more adaptable and skilled in a wider set of store operations or have a wider knowledge of products (often acquired through a three-year apprenticeship). In contrast, retail in the UK is to a large extent influenced by working conditions characterised by longer opening hours and labour flexibility. This has made the profession less attractive, with fewer training and career opportunities, which thus has lowered the average level of competence and qualifications of store employees.

4. Where? Agglomerations, inner city vs. external retail locations, and developments in Sweden

Although many studies of the retail industry deal with several spatial dimensions (ranging from consumer behaviour to industry location), their geographical importance, however, is often less outspoken. As the conditions of the retail industry have changed during the last few decades, geography has become more evident as they are deeply embedded in social, cultural, and economic circumstances as well as shaped by spatial coordination and physical conditions.

4.1 Retail agglomerations and geographic clustering

The locational patterns of the retail industry, concerning both entry and exit of retail activities, are influenced by dynamics internal and external to the industry. Internally, the industry is dependent on demand and supply of a given location, often clustering commercial activities in specific locations or consumption spaces. This concentration, or clustering, of retail activities is sometimes oversimplified and explained as "retail breeds retail" (i.e. "handel föder handel" in Swedish), a proverb that of course could also be reversed. A store closure in a key retail segment, or a closure influencing the general supply in a place, could mean that a threshold point is reached, which in turn could lead to a downward spiral seriously affecting the retail conditions for remaining stores (e.g. affecting customer mobility and willingness to travel to a certain place). Externally, the industry is also affected by the demography and mobility of the population and its residential and labour characteristics for instance. Where people live and their mobility (e.g. how they transport themselves to and from work, where they buy commodities, etc.) will expose them to several retail opportunities. This will influence the location of retail, and vice versa.

Clustering of retail activities is perhaps one of the most evident characteristics of the retail industry, be it in the high street, the mall, various shopping districts or in external retail locations. In a literature review made by Picone et al. (2009), they point out that the incentive to cluster is influenced by both demand and supply factors. Clustering facilitates or stimulates learning, knowledge transfer, and information sharing; it provides a common infrastructure and specialized labour market and may reduce transportation, transaction and search costs (see Maskell and Malmberg 1999, Feldman 2000). From a demand perspective, firms may clusters due to lumpy demand (i.e. irregular demand patterns in terms of timing and quantity) or to "tap into" rival firms' customer bases; to attract consumers searching for ideal products; to provide credible low-price commitments. However, agglomerations of retail activities may also contribute to pricing competition, i.e. price wars, which may be good for costumers but bad for business (see Picone et al. 2009 for a more detailed discussion). However, this could be mitigated by product differentiation or specialization, stimulating further clustering or cluster evolution.

Picone et al. (2009) also point out that agglomerations may not be an outcome of strategic decisions, but a result of hysteresis (dependence on current and past conditions and history): e.g. that spin-offs in some industries have a tendency to locate near the parent firm. They further argue that agglomeration of retail activities may not only be due to agglomeration economies, but likewise a result of location limitations, geography, lumpy demand, or demand density. In their study, based on the location of onsite and offsite alcohol retailers (e.g. bars vs. liquor stores), they find that retailers partly strategically cluster based on the ability to differentiate their supply of products. Liquor stores cluster least, while agglomerated bars, however, could benefit from positive spill-overs (e.g. bar hopping).

4.2 Inner city demise and proliferation of external retail locations?

In recent decades, edge-city or out-of-town shopping has grown rapidly, contributing to the build-up of so-called edge cities and urban sprawl (see Garreau 1992). Thus, a lively debate has emerged concerning whether the construction of large shopping malls and commercial districts in the outskirts of the city contributes to the demise of the inner city. Naturally, there are differing views on the nature and directionality of this development, which numerous studies are trying to address.

Increasing competition within the retail industry, between property owners and developers, and between local municipalities and regions has stimulated increasing land use devoted to commercial activities, including both the entry of new retail activities and expansion of existing establishments. As a result, during the last few decades the location of consumption spaces has shifted from the inner city and downtown areas to external shopping districts located in the urban fringes, especially as regards durable goods and space-consuming activities and establishments (Jörnmark 1998). According to Zukin (1998), this development was a result of a shift in planning focus from the city to the suburbs in the late modern period (1945-75), impelled by the increasing number of privately owned cars and an ever-more mobile population. Thus, new sites of consumption were planned and located near major traffic routes and communication junctions in relation to newly built residential areas in the outskirts of the city. The multi-purpose shopping centre, grouping a variety of stores, became the new ideal consumption and signalled a geographic shift in investments from the inner city to the outskirts of the city and suburban areas. What initially was intended to supplement inner-city commercial activities soon came to be a serious competitor for investments and customers.

These changes have generated a popular image, especially in the media, of a dying city centre not being able to cope with the increasing competition from external retail locations, i.e. edge-of-centre or out-of-centre retail and shopping districts. In the words of Baker and Woods (2010: 66): "Lifeless main streets are bad for business; they are calamitous for communities, stripping centres of their social significance, pulverising their 'sense of place'." They argue that the decline of the city centre is connected to the location of external supermarkets, as they attract customers who otherwise might have visited the inner city. While grocery shopping is relocated from the city centre to the external supermarkets, so is the natural pedestrian flow important for sustaining vitality and hence investments in high street locations. This is also observed by Dennis et al. (2002), pointing out how changes in land use due to the establishment of external retail locations creates so-called 'food deserts' in certain parts of the city, i.e. areas where the availability of food stores is low. The concept was developed in the UK in the mid-1990s and has been applied in studies of both urban (Apparicio et al. 2007) and rural areas (McEntee and Agyeman 2010). Food stores are thus considered to be magnets for other retail activities, and in order to maintain the vitality of more peripheral areas or neighbourhood centres, it has become a planning prerogative in many sustainable development plans to facilitate food store entry (see Wrigley and Dolega 2011).

However, as noted by Wrigley and Dolega (2011), recent studies show a more modest picture, where the city centre and high street manage to compete and sometimes outperform external retail locations. Although being faced with increased competition not only from the external locations, but also from a growing online retail trade, the high street and the town centre managed to tackle the global economic crisis of 2007 and 2009 better than other retail locations (especially as regards retailers of telephones and accessories, small food-retail-based convenience stores, cafes and restaurants). The results suggest that town centres and high streets show resilient, adaptive and reactive capacities in the face of economic crisis that not have been accounted for previously.

Studies of Swedish retail also show that during the 1990s and in the beginning of the millennium inner city retail has partly recovered and regained previously lost ground (in terms of turnover, number of stores, and employees) in relation to external retail locations (Rämme and Rosén 2009). This is explained by its complementary nature in relation to external retail locations. The convenience goods trade in the inner city is dominated by small and medium sized supermarkets frequented by commuters, inner city residents and workers making complementary purchases, while convenience goods trade in external retail centres are characterised by larger and less frequent purchases normally made by people living in both residential centres and neighbouring peripheral communities. The complementary nature is also evident as external retail locations most often is dominated by high-volume retail and durable goods, while the inner city retail is characterised by malls, department stores, small-scale service-oriented shopping and services (clothing, restaurants, cafés, etc.), and other commercial and public services. Another explanation for the recovery of inner city retail is active strategies of urban renewal and renovation of both physical spaces and social environments in order to increase the attractiveness of the inner city. Moreover, while the external retail locations have generated most growth and the inner city has gained ground, the biggest losers, according to Rämme and Rosén (2009), are the retail areas in residential neighbourhoods and centres outside the city centre, as well as neighbouring peripheral municipalities on a larger regional level.

Changes in retail supply in a specific place may also influence demand, not only in cities or other urban areas, but also in a larger hinterland creating larger catchment areas. This expansion of retail spaces may cause peripheral or rural areas to be forced out of business, increase consumer mobility, and transports (see Findlay and Sparks 2008). According to Nagy (2001), large-scale retail investments, foremost outside the cities in former East European countries, have also come to change consumer and transportation habits of urban residents. While generating longer trips, these investments are also contributing to social inequality, as it becomes harder for low-income residents to transport themselves to these locations while, at the same time, local retail establishments are forced to close. External retail locations in Sweden have been very successful during the last decade, showing increased turnover, number of retail firms, and employees, which is partly is an effect of a substantial and rapid expansion of external locations (Rämme and Rosén 2009). Moreover, and from a geographical perspective, it is shown that retail establishments in regional centres have performed better than the nation as a whole. External and inner city retail within the regional centres have been more successful compared to retail in other parts of the municipality and in neighbouring peripheral municipalities.

4.3 A brief account of Swedish retail developments

The evolution of the Swedish retail industry has been followed by major structural changes and influx of ideas and ideologies concerning consumption, retail formats, and locational prerequisites, not least from the US. Although the Swedish economy has recently faced one of the most severe economic crises in modern times, the retail sector (besides hardware and electronics) has performed well and actually gained ground. The major effects of the crisis are reported to be changing consumer behaviour (e.g. enhanced "value-for-money" search schemes), intensified use of private labels or brands, multi-channel retailing (e.g. online), increased use of social media in marketing, and increased awareness of corporate social responsibility (see PwC 2011).

From a historical perspective, an important change affecting location of retail facilities was the amendment of the law on competition in the early 1950s, where price competition was allowed by abandoning a previous system where the producers set the prices (the so-called "bruttoprissystemet"). But more importantly, the new laws also made it possible for local urban planners to influence decisions regarding new commercial establishments and their locations (see Falk and Julander 1983 for a more detailed review of early Swedish retail studies). This so-called planning monopoly created a situation where the local community, in dialogue with representatives from the industry, would decide what and where certain retail establishments were to be located. By default, and in order not to distort the market, competing department stores and multiple chain stores were encouraged to locate next to each other (most often owned and/or operated by the Swedish Cooperative Union, KF, or the Purchasing Centers' Corporation, ICA). Generally, the facilities were built as one-storey, freestanding, supermarkets near the suburbs or in residential neighbourhood centres in the city or as large unit warehouses or hypermarkets foremost outside the cities. Pioneers during the 1960s were Wessels, Obs! Stormarknad, and EPA. Also, within the specialized stores segment, there was a growing trend of setting up multiple chain stores, such as H&M, and chains sharing a trademark or brand name co-organizing for instance marketing, purchasing, logistics, etc. (see Tufvesson 1996, Jörnmark 1998). The trend in the 1970s pointed to larger and fewer retail outlets. New logistical systems, better transport infrastructure, and planning strategies based on a sufficient number of customers within walking distance, lay the groundwork for the establishment of the modern supermarket in Sweden. In the second half of the 1980s larger out-of-town supermarkets were established in industrial areas on the urban fringes, and the old neighbourhood planning model became more and more obsolete (see Svensson 1998). In the 1990s and onwards, deregulation, internationalization and online retail has come to increase competition in the retail industry. As a result, tendencies toward geographic dispersion of retail and larger retail units or areas in external locations have been reinforced. New retail strategies have also come to include a broader spectrum of activities incorporating, not only shopping services, but also leisure and entertainment elements (such as cinemas, food courts, gyms, amusement and theme parks, etc.) within the walls of the retail establishment (see Zukin 1998). In Sweden, an example of this in was the opening of Heron City in Huddinge outside Stockholm in 2001.

Also in Sweden, from the 1990s and onward, competition between commercial agents (e.g. retailers and chain stores), property companies, and the municipalities has stimulated an increase in land use devoted to commercial activities. Structural changes in both the Swedish retail and wholesale industries during the last few decades have led to a rapid increase of turnover and a higher representation of international ownership, and we have also witnessed a shift in the location of consumption spaces from the inner city and downtown areas to external shopping districts located on the edge of town or out of town, especially as regards durable goods and space consuming activities and establishments (Jörnmark 1998, see also Bergström 2002, Bergström et al. 2002).

The fact that turnover in the retail industry has increased more than 38 per cent between 1997 and 2007 show the expansive nature of the industry in Sweden. Although, this may also partly be reflected by a general population increase and higher income levels, it also points to a geographical unevenness. According to Rämme and Rosén (2009) only 70 of Sweden's nearly 300 municipalities contributed to this growth. These municipalities were exclusively metropolitan cities, residential cities, suburban municipalities, and smaller municipalities typically characterised by cross-border or tourism shopping. On a more detailed geographical level, it is shown that, although the inner city centres had recovered somewhat, most of the increase was attributed external retail locations, while the biggest decreases were to be found in neighbourhood centres and in neighbouring rural areas. A recent inventory of Swedish retail areas also shows that the inner city retail areas only constitute a minority of the identified retail concentrations in the country (SCB 2011)

As new or enlarged retail locations on the urban fringes, or out of town, also require new transportation considerations, a wide range of studies have come to focus on the environmental impacts of changing geographical retail patterns. Several of these have studied how household preferences and consumption patterns change in line with the expansion of external retail locations, leading to longer transports and frequent use of cars instead of walking or biking to nearest retail location. In turn, this will have a negative environmental impact (see Forsberg et al. 1994, Hagson 2003, Neergaard et al. 2006). However, in a recent study Gebresenbet et al. (2011) conclude that co-ordination and optimization of distribution and transports, in this case of food products to retail locations, could provide more efficient and environmentally sustainable distribution systems. A further effect of the concentration of retail locations to a few bigger locations is a lower retail supply and availability of retail opportunities in certain parts of the country, providing a threat to traditional shopping centres (see Thomas et al. 2004, Rämme and Rosén 2009). In Sweden, many smaller retailers have been forced out of business, not least in sparsely populated areas, due to increased competition from external retail locations. This has foremost been evident in the closure of many village shops and local petrol stations around the country, a phenomenon described as "the death of the petrol station" (i.e. "mackdöden") in local and national media (see Amcoff et al. 2011). Other studies show that the expansion of external retail influences not only internal retail locations within the city, i.e. city centre, but also residential centres and consumption spaces in the outskirts of the city (Ranhagen 2002, Svensson 2004) and external relations between cities (Bergström et al. 1999, Rämme and Rosén 2009). These studies show that trade of convenience goods in the inner city can handle the competition better than retail facilities in residential areas and neighbourhood centres. The most visible effects are found between cities, as the external shopping centres normally attract a wider customer base residing in neighbouring cities and municipalities.

5. Concluding remarks

Although paralleled by economic recession in the last years, the developments of the retail industry have been characterized by rapid expansion and growth, both in terms of turnover and market entries, as for example in Sweden. However, these changes have spatial implications pointing to not only the importance of location, but also to a need of a better geographical understanding of where these changes are taking place and what kind of retail activities they are influencing. To a degree, this is also reflected in a growing interest in the study of the importance of space, place, and location for understanding the interconnectedness between consumption and the built environment, not least in economic geography. Although aiming to provide a useful background on the current literature in the research area, this review does not claim to cover or summarize the vast body of literature on retail written during the last decades.

Regarding the questions of what and how the retail industry has changed and where these, from a locational perspective, has taken place, it is clear that the developments in the industry are influenced by many related factors and conditions situated in space. In short, these are characterised as related to: a) the evolution of different store formats, consumption patterns and consumer behaviour, and increased global competition and the opening up of new international markets; b) national and regional laws and regulations regulating the retail industry and its location, innovations (product, technological as well as organizational innovations), and labour conditions and labour market composition; and c) geographical context and location.

As shown in recent studies, and despite a growing trend of concentration of retail activities in external retail locations and establishments, inner city retail is reported to handle competition from external retail locations relatively better than retail in neighbourhood centres and peripheral areas. This review thus identifies a gap in the literature where more studies are needed to understand the complementary nature of certain types of retail and retail locations effecting consumption and locational geographical patterns.

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