EVOLVING PERCEPTIONS OF ASSORTMENTS, IMAGE AND CUSTOMER EXPERIENCES IN RETAIL ENVIRONMENTS

by

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ABSTRACT

Consumers' perceptions of retail stores, the assortment of products and the locations in which they are situated, all influence consumers' decisions about where, when and how to shop. In the highly competitive arena of retailing, this knowledge greatly affects retailer performance and marketing strategy. Despite this strategic importance, the literature lacks empirical research into the assortment of categories offered in retail stores and their influence on store image. Moreover, image conceptualisation for different retail contexts is fragmented and the consumer image perceptions of categories are unexplored. Recent attention has shifted to customer experience research, yet this literature refers to the consumers' interaction with one retailer, when consumer shopping journeys may include many retail interactions.

The research presented in this thesis addresses the above gaps, contributing to theory and knowledge in the area of retail marketing. The thesis comprises eight papers published over a 17-year period. It examines the perceptions and roles of retail assortments; category perceptions and management in retail stores; customer perceptions of image and experiences of town centres.

The thesis draws from a range of empirical studies documented within the eight papers. These include: a comparative study of ten major retailers' assortment strategies; a survey of 504 consumers' perceptions of supermarket assortments; a qualitative study involving six national focus groups of apparel consumers; and a survey of 536 consumers across five regional city centres. The studies are informed by two literature reviews documenting retail assortment research and town centre research.

Collectively, the thesis delivers a significant research contribution to knowledge and theory. The first four thesis papers clarify the strategic relationships between retail assortment and image. The following two papers identify new perspectives of image congruence and relationships between category and store image. The final two papers consolidate all previous contexts in a multi-faceted retail image construct, emphasising the previously neglected psychological image elements. Fundamentally, consumers' experiences in town centre retail environments contribute to the ongoing process of "holistic" image creation.

The findings demonstrate that as retail environments change, consumers' perceptions are also evolving from a functional, static image perspective to a dynamic, experience driven concept. The research commentary concludes by outlining future research agenda.

Keywords

Retail Assortment, Retail Image, Customer Experience, Town Centres, Consumer Perceptions, Consumer Behaviour.

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Commentary: Overview, theoretical context and structure of the thesis.

1. Introduction

The following thesis documents a portfolio of eight published papers with their preceding commentary, in submission for PhD by publications. The research presented in the thesis portfolio contributes to theory, knowledge and discussion in the area of retail marketing. Drawing from a range of empirical studies, it provides a new understanding of perceptions of retail assortment, retail image and customer experience in different retail contexts. Table 1 (page 2) outlines the eight papers and their corresponding research themes. The first four papers comprise a comparative study of retailers' assortment diversification strategies; a study of consumer perceptions of supermarket non-food assortments, investigating both category expansion and merchandising preferences; a review of the retail assortment literature and research. The two following papers explore in-depth the consumer behaviour responses and category management issues for a fashion retail sector. The final two papers examine consumer images and customer experiences of town centres.

Whilst individually, these studies make important contributions to their host literatures, namely retail assortment, retail image and customer experience, it is the concept of retail image, which permeates all eight papers and in so doing it provides supplementary contributions relating to: (i) Evaluating the evolving role of the retail assortment in defining image; (ii) synthesising the different contexts of retail image, and (iii) conceptualising the link between image and customer experience.

This chapter encompasses the supporting commentary to the thesis as follows. It continues with a summary of the author's personal research journey outlining the rationale for three research themes, whilst the third section critically reviews the literature and theoretical context underpinning the research themes. Next, the research approaches employed in the thesis are introduced, before presenting the portfolio of papers. The final section discusses the overall contribution of the thesis and linkages across the three research themes.

Cognizant of the limitations experienced during this research, the commentary concludes by summarising these, before outlining the agenda for future research.

Table 1: Portfolio of papers by literature themes

Retail assortment: Perceptions and roles

Hart, C.A. (1999) The Retail Accordion and Assortment Strategies: An Exploratory Study, *The International Review of Retail, Distribution and Consumer Research*, 9(2), pp.111-126, ISSN: 0959-3969. Hart contribution: 100%.

Hart, C.A. and Davies, M.A. (1996a) Consumer Perceptions of Non-Food Assortments: An Empirical Study, *Journal of Marketing Management*, 12(4), pp. 297-312, ISSN: 0267-257X. Hart contribution: 50%.

Hart, C.A. and Davies, M.A. (1996b) The Location and Merchandising of Non-Food in Supermarkets, *International Journal of Retail and Distribution Management*, 24(3), pp. 17-25, ISSN: 0959-0552. Hart contribution: 50%.

Hart, C.A. and Rafiq, M. (2006) The Dimensions of Assortment: A Proposed Hierarchy of Assortment Decision Making, *The International Review of Retail, Distribution and Consumer Research*, 16(3), pp. 333-351, ISSN: 0959-3969. DOI: 10.1080/09593960600697063. Hart contribution: 70%

Retail image: Category behaviour and management

Hart, C.A. and Dewsnap, B. (2001) An Exploratory Study of the Consumer Decision Process for Intimate Apparel, *Journal of Fashion Marketing and Management,* 5(2), pp. 108-119, ISSN: 1361-2026. DOI:10.1108/EUM0000000007282. Hart contribution: 50%.

Dewsnap, B. and Hart, C.A. (2004) Category Management: A New Approach for Fashion Marketing? *European Journal of Marketing*, 38(7), pp. 809-834, ISSN: 0309-0566. DOI: 10.1108/03090560410539267. Hart contribution: 50%

Customer experience of retail environments

Hart, C.A., Farrell, A.M., Stachow, G.B., Reed, G.M. and Cadogan, J.W. (2007a) Enjoyment of the Shopping Experience: Impact on Customers' Repatronage Intentions and Gender Influence, *The Service Industries Journal*, 27(5), pp. 583-604, ISSN: 0264-2069. DOI: 10.1080/02642060701411757. Hart contribution: 40%

Hart, C.A., Stachow, G.B. and Cadogan, J.W. (2013) Conceptualising town centre image and the customer experience, *Journal of Marketing Management,* 29(15-16), pp.1753-1781, DOI: 10.1080/0267257X.2013.800900. Hart contribution: 50%

It should be noted that the portfolio of eight papers is a focused selection from a far wider corpus of research output, conducted over a period of 23 years. Conference presentations, collaborations and other published outputs, while excluded from the core portfolio, provide relevant evidence along the research journey and are referenced accordingly. The individual portfolio papers are distinguished throughout by bold type.

2. Background to the research areas

My first and second degrees in textile design and fashion established an early graduate career in the textiles industry. I progressed from design to sales and marketing management roles in the UK East Midlands textiles industry, liaising with buyers and designers for major retailers such as Marks and Spencer and the Arcadia Group. This was a logical skills fit as I had also worked in retailing for seven years, prior to and during my undergraduate studies, followed by 4 months working in a US retail fashion store on graduation.

By the early 1980s, UK retailers were growing in scale and power within their channels of distribution. My next career move combined manufacturing with retail, working for a Leicester knitwear manufacturer diversifying into retailing. Within three years, the Sweater Shop expanded rapidly from three factory outlets to 55 branded stores. My interest in retailing renewed, I sought a new challenge beyond independent retailing. Researching my masters' dissertation in 1983 and an external examining position at De Montfort University had developed an interest in academia. Joining the Business School at Loughborough University in 1992 was a leap of faith, moving from a creative practical industry role, with little formal research training. It has been a long but interesting journey, and the following thesis aims to synthesize the core focus of my research during these 23 years.

Academic research provided an exciting opportunity to broaden my retail knowledge through researching different retail sectors and organizations. In particular, as the Sainsbury Retail Fellow, to expand my hitherto focus on the fashion industry. My initial mantra was to pursue research that would have value to both practitioner and academic audiences. This philosophy remained throughout the subsequent research projects, as illustrated in the following section, which outlines the backdrop and rationale for three research areas of retail assortment, retail image and customer experience.

2.1 Retail assortment: Non-food diversification

At the time of embarking on this body of research, in about 1990 UK grocery retailing was enjoying a "*Golden age*" (Wrigley 1991; p.1537), as UK food retail assortments expanded rapidly during the mid-1980s to 1990s. This expansion was attributed to rapid market growth by the major grocery retailers, increasing retail floor space and high competition together with the consumers' desire for a one-stop-shop (Wrigley 1991; Wrigley 1994). However, a static grocery market meant that to fill this floor space, retailers sought new profitable growth areas with non-food diversifications offering most scope. The negative implications of these non-food brand extensions were grocery retailers had less authority and expertise in new general merchandise categories, and space constraints limited the depth of product variety offered. Retailers also risked alienating loyal customers by diluting their beliefs associated with the retailer brand and its image as a food retailer (Roedder *et al.*, 1998). Hence, the role of the retail assortment becomes integral to the retailer image as perceived by its customers.

Against this backdrop, as the recently appointed Sainsbury Retail Fellow at the Business School, my induction included meetings with Sainsbury's senior management to set a research agenda. Ivor Hunt, Marketing Director, proposed the initial research question; *"What is the limit for non-food diversification in supermarket assortments?"* This line of enquiry commenced with an exploratory study of 10 retailers (Hart 1993; Hart 1994; **Hart 1999**[1]) followed by an empirical study of consumers (Hart and Davies 1994; Hart and Davies 1995a; Hart and Davies 1995b, **Hart and Davies 1996a, Hart and Davies 1996b**). A project report was also produced for Sainsbury's (Hart and Davies, 1995c). It is interesting to note the conclusions of the report, which indicated that according to their loyal customers, Sainsbury's strengths lay in food assortments and any subsequent

[1] Emboldened references denote the portfolio papers. See Table 1 for further details.

diversification into non-food ranges required careful positioning. Three years later, Sainsbury's market leadership was overtaken by Tesco, largely due to the latter's aggressive superstore and non-food growth strategy, and their pioneering Clubcard loyalty scheme. In contrast, Sainsbury's made three further failed attempts to introduce fashion into their supermarkets but struggled to find the right positioning to fit their customer base and store environment. Together, these early papers presented important new insights into the role of assortments for retail image and strategy.

2.2 Retail image: Fashion categories

Subsequent research revealed that the assortment strategy problem was not unique to food retailers. Having previously worked in the textiles and fashion retail industries provided a valuable contrast to the grocery sector, developing a new research stream. In 1996, Triumph International, a global brand and major supplier to Marks and Spencer's flagship intimate apparel category, commissioned me to research the consumer perceptions and attitudes of brand images. Marks and Spencer's category performance suggested a declining consumer interest and in response, M&S implemented assortment reduction within the bra category. Yet conversely, the brand supplier, Triumph, reported steady sales performance from other retail customers for the same product category.

This line of research investigation developed by exploring in-depth the consumer perceptions of specific categories and brands within the relatively neglected intimate apparel research context. Based on a series of consumer focus groups across the UK, I delivered a confidential research report to the client company (Hart 1996). Collaborating with Dr Belinda Dewsnap in 1999, we then analysed the data further, to develop a conference paper and two journal papers in the areas of consumer buyer behaviour and category management (Hart and Dewsnap, 2000; **Hart and Dewsnap, 2001; Dewsnap and Hart, 2004**). These papers thus filled a gap in understanding the consumer perceptions and behaviour for an under-researched apparel category.

2.3 The customer experience and town centre image

As my research and knowledge of the literature evolved, it became clear that the assortment is a crucial attribute of store image and a key attractor to retail patronage (Lindquist, 1974). It was also becoming clear that retail image involved wider contexts within and beyond the retail store (Stern *et al.*, 2001). Yet by 1996, very few academics had researched consumer perceptions of individual departments or categories within stores and the retailer implications for managing the increasing scale and diversity of assortments (McGoldrick, 2002). The limited research could be attributed to the speed of retail development at the time, driving new retail formats and strategy. In particular, the rise of the shopping mall was attracting a new generation of retail researchers, keen to understand consumer responses to this emerging format (*c.f.* Finn and Louviere, 1996; Chebat, Sirgy and St-James, 2006). This academic attention was in stark contrast to the relatively neglected area of town centre image research, arguably the earliest retail location. The latter research gap offered a new context of image study, which provided a logical affinity with store and category image research, due to the concentration of retail outlets located in town centre agglomerations.

The Retail Sector Skills Council and the Learning and Skills Council funded my third industry supported research study in 2004. As part of a wider study into the skills, training and business issues in the retail industry, this research explored consumer perceptions of five city centres within the East Midlands region. The overall study generated a project report, three conference papers and three journal papers (Hart, Stachow and Reed, 2005; Hart, Stachow and Reed, 2006a; Hart, Stachow and Reed 2006b; Hart, Dennis and Stachow, 2008; **Hart *et al.* 2007a;** Hart *et al.* 2007b; **Hart, Stachow and Cadogan, 2013**). Collectively, this body of work found that consumers form distinct images of an urban centre, with the assortment of stores being the primary image attribute. Collaborating with Dr Andrew Farrell and Professor John Cadogan, we also examined the shopping experience. Interestingly, the town centre research revealed that consumers' experiences in diverse town centre environments contribute to the ongoing process of a "holistic" image creation. Consequently, this thesis illustrates how consumer perceptions of retail environments evolved from a largely functional, static image perspective, to a more dynamic, experiential conceptualisation, encompassing the customer experience.

The most recent phase of consumer-oriented research addresses the holistic customer experience. Funded by the ESRC and six industry partners, my fourth industry supported study builds on the research foundations developed over the previous 20 years. Thus, the research included in this portfolio sought not only to advance academic theory, but also to contribute research to bridge the gap between academic and practitioner understanding.

This section has documented the evolving rationale for researching the specific themes of retail assortments, retail image and customer experience. In the next section, the underpinning literature and the associated linkages between these three areas are discussed.

3. Literature and theoretical context for the portfolio

The purpose of this section is to provide an overview of the relevant themes from the literature, which underpin this thesis, and in so doing, the important gaps within this body of literature will be highlighted. The portfolio of papers included in this thesis resides in the broad area of retail marketing. Specifically the first literature theme (i) introduces assortment as a key element of retail strategy and reveals a lack of empirical research to support strategic assortment decisions. (ii) The next theme considers assortment within the concept of retail image and identifies the literature gaps pertaining to image conceptualisation and retail contexts. (iii) The emerging literature relevant to the customer experience is then introduced. It should be noted in the portfolio that each individual paper discusses the theoretical rationale and specific literature supporting the reported research.

3.1 The changing role of assortments in retail strategy

The assortment serves an important function in retailing linking supply with demand by providing a selective range of merchandise for consumers to purchase. As a key element of the retail marketing mix, merchandise is the primary reason for a consumer to visit a store, browse or purchase. Within the retail mix, the assortment operationalises the retailer's strategy becoming a strategic positioning tool to attract and retain core customers (Grewal *et al.,* 1999). Furthermore it is used as a classifier of store formats, creating a "dynamic dimension of retailing" (Brown, 1990, p.146), as shifting patterns of assortment shape retail evolutionary theory (Hollander, 1966). It is unsurprising therefore, that the product assortment is acknowledged as a key attribute of retail image (Martineau, 1958; Lindquist, 1974; Samli, 1989).

At the time of the reported accelerated expansion of retail assortments in the 1980s, the academic literature primarily focused on the assortment selection problem i.e. which specific portfolio of products should a retailer carry within a finite retail space (Rajaram, 2001). This literature can be sub-categorized under three broad research streams; retail space management (*c.f.* Corstjens and Doyle, 1981; Urban, 1998); assortment variety (e.g. Kahn and Lehmann 1991, Boatwright and Nunes, 2001); and consumer driven assortment research (e.g. Simonson, 1999, Leszczyc and Timmermans, 2001). The common thread linking these three research streams was the overarching operational focus on managing individual products within an assortment. Prior to 2001, the literature treated assortment as one collection of products, with limited research of sub-assortments such as categories, or departments and their optimization to maximize retailer performance. Indeed, given the dramatic changes in retailer assortments there is a noticeable lack of empirical or theoretical support for strategic assortment decisions such as what mix or width of categories to offer in a retail store. For example, while McNair (1958) and Hollander (1966) note the strategic relevance of assortments in repositioning stores over time, 30 years on, very little, subsequent attention had focused on understanding or describing assortment movement. This is a critical strategic shortcoming of the retail literature which formed the rationale for paper 1 **(Hart 1999)** in the thesis and later, for paper 4 **(Hart and Rafiq 2006)**.

Different levels of assortment exist in retailing with individual products organized into complementary groups to facilitate management. Category Management (CM) developed in the 1990s as a retailer-supplier initiative for managing increasingly complex groups of assortments to achieve enhanced business performance and consumer value. The CM concept began as part of the Efficient Consumer Response (ECR) strategies “Efficient store assortment” and “Efficient store merchandising” (Kotzab, 1999). As such, CM provides a collaborative demand management approach to achieve “Collaborative shopper value creation” by ignoring traditional product groupings and focusing on how consumers shop related products in a category (ECR Europe, 2000). CM therefore provides a more coherent approach to optimizing assortments and controlling the visual impact of product categories through space allocation to satisfy consumer needs (Kent and Omar, 2003; Varley, 2006). Thus, the CM process may in turn, shape consumer perceptions of the assortment. If departments, product groups and categories exert their own image then Category Management provided a means for operationalising this. From 2000, the use of CM was more prevalent, but applied principally to grocery retailing. At that time, few researchers had studied consumers’ image perceptions of different non-food categories. This emerging literature gap identified two potential areas of research enquiry, (i) the scope for category management in a non-food context and (ii) the implications of category management for consumers. These research areas are pursued further in papers 5 **(Hart and Dewsnap 2001)** and 6 **(Dewsnap and Hart 2004)** of the thesis.

3.2 Retail Image: Conceptualization and contexts

A considerable body of literature specific to retail image has emerged in the 58-year period since Martineau’s (1958) seminal paper on store image. The importance of image is clear; the successful performance of stores is “explicitly or implicitly related to image management” (Samli, Kelly and Hunt, 1998, p. 27). Consequently, image and its constituents are used to evaluate retailers’ marketing performance from the customers’ perspective (McGoldrick 2002, p. 180). Moreover, image operates as a predictive variable in assessing consumer patronage to a retail store and is an important component of store choice decision (Malhotra, 1983). Accordingly, an associated literature stream explicitly examines the various image elements that influence retail patronage (*c.f.* Osman, 1993; Pan and Zinkhan, 2006).

An image is an overall impression of a store as perceived by consumers (Keaveney and Hunt, 1992) and thus various approaches for analysing, monitoring and measuring consumers' images are documented in the literature (Oxenfeldt, 1974; Chowdhury, Reardon and Srivastava, 1998). Specifically, studies of consumers' image formation suggest store image is an attitude or set of attitudes based upon evaluation of salient store attributes (Doyle and Fenwick, 1974; James, Durand and Dreves, 1976). Store image is deconstructed further into dimensions, components and attributes, with the latter referring to "the narrowest most specific constructs" (Hansen and Deutscher, 1977 p. 59). Consequently an early stream of image research identified image determinants and investigated store image as a multi-attribute construct (Lindquist, 1974).

Despite increasing academic attention, there is limited consensus about the salient image attributes and dimensions with researchers disagreeing as to which specific image variables are most relevant (Samli, Kelly and Hunt, 1998). Notably, attributes constituting store image often vary in importance and mix depending on the location, sector, market and context for the shopping trip (Hansen and Deutscher, 1977; Schiffman, Dash and Dillon, 1977; Davies 1992; Birtwistle, Clarke and Freathy, 1999). Yet, the retail assortment features consistently as a key image variable throughout the literature (Hart, 2009).

Image conceptualisation reveals contrasting interpretations in the literature. Stern, Zinkhan and Jaju, (2001) categorise store image definitions into three conceptual groups. (i) Studies focusing on functional qualities such as assortment, price, service and layout (ii) Research emphasising consumers psychological orientation and cognitive processes, for example in image formation; (iii) Complex configuration combining functional attributes, consumer perceptions and attitudes of a retail environment. Notably the first two conceptualisations interpret image as a static entity and multidimensional construct combining "tangible or intangible elements that stimulate consumer perceptions" (Stern, Zinkhan and Jaju, 2001, p. 214). Whereas the latter conceptualisation interprets image as a dynamic, transactional process whereby individuals form images and integrate perceptions and information about an object or store into a *gestalt* (MacInnis and Price, 1987).

However, the measurement and operationalisation of image lags behind its conceptualisation (Hartman and Spiro, 2005). The key issue is there are no standardized tools or techniques capable of capturing and measuring the image construct or gestalt (Zimmer and Golden, 1988). While conceptualizations tend to emphasize the holistic nature of image, measures usually adopt a “piecemeal”, attribute-by-attribute approach: “in short, an image was believed to be a picture but was measured with a list” (Keaveney and Hunt, 1992, p. 167).

Later, researchers identify retail image as a more complex paradigm encompassing the brand, store and corporate images (Burt, 2000; Stern, Zinkhan and Jaju, 2001). Examining the literature suggests up to six different levels or contexts for retail image; the individual product brand image, department or category image, store image, retail chain image, shopping mall image and more recently, town centre image. Considering that retailing involves managing multiple image contexts, this suggests two further research gaps; 1) to understand the potential interrelationships such as congruity between different image contexts, and 2) the influence of brands upon these image contexts (Grewal and Levy, 2009). These linkages are pursued further in paper 2 (**Hart and Davies 1996a**).

While store image attracted most academic attention, conceptualisation of other retail image constructs is less developed. Town centre image research is particularly sparse when compared with more recent image contexts such as shopping malls. The image of a town centre exhibits similar characteristics to store image i.e. a multidimensional concept comprising both tangible / functional attributes relating to physical features (Bell, 1999); with more intangible attributes representing its atmospheric qualities (Van Raaij, 1983). It is unsurprising therefore, that researchers frequently transfer store image measures to the mall or town centre context (e.g. Gentry and Burns, 1977; Nevin and Houston, 1980). Nevertheless town centres contain community spaces, public facilities and atmospheric concerns such as safety that may influence consumer perceptions and patronage intentions (Oppewal and Timmermans, 1999). The image literature thus reveals a vital research gap; the lack of empirically established image variables pertinent to the town centre retail environment (Gautschi, 1981). Without this, it is difficult to measure, operationalise or manage the consumer’s perceived image of a town centre. This conceptual issue is developed further within paper 8 (**Hart, Stachow and Cadogan, 2013**) of the thesis.

3.3 Customer experience

The third body of literature underpinning the portfolio of papers is an evolving area within retail marketing, namely the customer experience. The customer experience literature originated from aspects of consumption and services marketing (Holbrook and Hirschman, 1982; Carbone and Haeckel, 1994; Schmitt, 1999), expanded to branding (Berry and Lampo, 2004; Brakus, Schmitt and Zarantonello, 2009), consumer behaviour research (Pullman and Gross, 2004; Gentile, Spiller and Noci, 2007) and retail environments (Arnold *et al.* 2005; Haytko and Baker, 2004; Grewal, Levy and Kumar, 2009). Conceptualised as a psychological construct, the customer experience is defined as the consumer's "internal and subjective response" to any direct / indirect contact with a retailer (Meyer and Schwager, 2007 p. 118). In a retail setting, direct contact typically entails physical interactions with retail stores, products or services. The indirect contact may involve unplanned encounters with representations of the company, products and services such as advertising or product reviews, which occur increasingly online (Novak, Hoffman and Yung, 2000; Rose *et al.* 2012).

Similar to image, customer experience contact results in a "take-away impression", formed by the consumer and stored in their long-term memory (Carbone and Haeckel, 1994). Thus, customer experience overlaps with the image concept through the customer involvement with the retail environment. Customer experience is also considered holistic in nature, as it may begin with anticipation and journey to the store through to the completion of the shopping trip (Gilmore and Pine, 2002; Haytko and Baker, 2004). Yet, the holistic aspect potentially delimits the customer experience leading to conceptual and measurement issues, for example identifying which part of experience to measure; perceptions of specific elements or the total experience? (Palmer, 2010).

Nevertheless, the two concepts differ. Experience suggests a dynamic, interactive construct that develops over time; in contrast to the static "overall picture" concept of image in the consumer's mind (Oxenfeldt, 1974, p.8). The customer experience is interpreted as a journey involving a series of memorable interactions or touch points, which combine to form the overall experience (Lemke, Clark and Wilson, 2011). Notably, consumers "co-create" their unique experiences due to their active involvement with the environment (Gentile *et al.* 2007, p. 396).

The customer experience concept is growing in importance and relevance, due to its reported influence on customer satisfaction and future consumer behaviour. Prior to 2009, the academic coverage of customer experience literature was sporadic. However, a special issue of the Journal of Retailing (Verhoef *et al.*, 2009) sought to remedy this gap by conceptualizing the customer experience in a retail setting. Other articles develop key characteristics of customer experience, emotions and particularly the relevance of the customer journey (Pullman and Gross, 2004) incorporating cues or touch points (Berry, Carbone and Haeckel, 2002).

Despite an increasing attention from academic researchers and practitioners, the term customer experience remains a nebulous and unclear concept, having been "widely used and abused", in its ambiguous application (Palmer, 2010). Definitions vary from a hedonistic to a utilitarian viewpoint. Moreover, from a retail environment perspective, there are two important gaps. To date the customer experience literature refers to the consumer's interaction with one brand, retailer or service. While a customer's experience extends across multiple channels, the nature of their experience within an agglomeration of retail stores such as a town centre is unknown. Furthermore, there is limited empirical evidence regarding the composition of customer experience, or how this may be captured and measured in a retail setting. These areas for research enquiry were subsequently developed in paper 7 (**Hart *et al.* 2007a**) and paper 8 (**Hart, Stachow and Cadogan, 2013**) of the thesis.

The above section summarised the theoretical context for three connected literature themes and in so doing, it identified a number of research gaps residing in each literature area.

4. The portfolio of papers: Research approaches and contributions

This section introduces the portfolio of eight published papers of which the thesis is comprised, which were originally written to address the research gaps identified in the previous section. Before introducing each individual paper, a broad overview of the research approaches is provided below. It does not describe the methodologies in detail, as this is discussed as appropriate in the relevant papers.

There was no overarching research philosophy adopted over the 17-year research period, but rather each study was tailored in its research approach to match the specific research "problem". As the studies progressed, the knowledge and confidence to incorporate more innovative research designs also increased. I particularly enjoyed the challenge of creating a new research solution to fit the problem and circumstances. As a result, the eight papers encompass mixed method approaches to research design that draw on a variety of data collection methods using a diverse range of data sources as follows.

The findings from two exploratory, qualitative studies are presented comprising:

1. Depth interviews conducted with key stakeholders in 10 major UK retail companies, including 13 senior managers from the food and mixed retail sector (paper 1);
2. Six national focus groups comprising 48 intimate apparel consumers and using three different data collection methods; a word association exercise, semi-structured open discussion, and a "blind" brand experiment (papers 5 and 6).

Detailed literature reviews were also undertaken during the research period. Two of these are reported in the portfolio, covering retail assortment research (paper 4) and town centre research (paper 8).

The findings from the earlier qualitative papers, informed two larger quantitative consumer surveys:

3. A consumer intercept survey conducted in 1995, involving 504 respondents recruited across six major UK grocery retailers (papers 2 and 3).
4. A consumer intercept survey conducted in 2005, involving 536 respondents in five East Midlands city centres (papers 6 and 7).

This mixed approach demonstrates a rigorous theoretical development from exploratory through empirical studies, which are advanced in subsequent papers. Moreover, the innovative approaches adopted in the above studies, deliver richer research insights, enhancing the wider contribution to the image literature. For example, in study (2) above, **Hart and Dewsnap (2001)** and **Dewsnap and Hart (2004)** developed a creative qualitative research design incorporating blind tests and projective techniques to uncover in-depth consumer behaviour and attitudes towards brand images in an underexplored category. In study 4, **Hart *et al.* (2007a)** and **Hart, Stachow and Cadogan (2013)** combined quantitative and qualitative approaches in a consumer image study, to elicit and capture overall impressions of town centre image. The rationale for the chosen research design and methodology is specific to the respective study, and this is reported in detail within the individual paper chapters.

The portfolio of papers, presented in the following sub-sections, showcases my academic career to date, demonstrating many significant, theoretical contributions to the retail marketing literature. Evaluating eight published papers, this research commentary will next summarise the key findings and the contribution for the individual papers. While each of the papers makes an individual contribution to the literature, collectively, the thesis provides a significant body of research output, that contributes to the following three parallel yet highly connected literature streams, and their associated research gaps, as identified in the previous section;

1. Retail assortment
2. Retail image
3. Customer experience

4.1 Retail assortment: Perceptions and roles

Paper 1: *Hart, C.A. (1999) The Retail Accordion and Assortment Strategies: An Exploratory Study. The International Review of Retail, Distribution and Consumer Research, 9(2), pp. 111-126, ISSN: 0959-3969.*

In the late 1990s, the critical strategic question of which categories a retailer should carry in a particular store, had not been addressed in the literature, consequently it provided a point of departure for my assortment research agenda. **Hart (1999)** set an important context for the ensuing assortment research by comparing and contrasting the assortment strategies of food multiples with mixed retailers by recording the relative change in assortment movement i.e. expansion and contraction. The data were gathered in 1993 and results initially presented at UK and International conferences (Hart, 1993; Hart, 1994). The ensuing feedback then helped shape the findings into a journal paper, which was subsequently published **(Hart, 1999)**.

The paper's key contribution is in providing new evidence to support the *Accordion theory* (Hollander, 1966), which compared with other cyclical theories in the literature, such as the *Wheel of Retailing*, had been neglected and limited to anecdotal evidence (Brown, 1987). Additionally, it identifies the key factors and issues associated with diversifying or contracting retailer assortments. Taking the retail organizational perspective, the exploratory study involved in-depth interviews with key stakeholders in 10 major retail companies, including 13 senior managers from the food and mixed retail sectors.

Using the "number of lines" as a proxy measure of assortment, the assortment movements for a 10-year period were synthesized and contrasted in the food and mixed retail sectors. Significantly, the findings demonstrated that the five major food retailers had all diversified and expanded their assortment by 7% - 400%. In contrast, the mixed retailers had all rationalized their assortments during the same period, deleting between 5%-65% of their product lines. The latter, for example reducing a store assortment from 75,000 lines to 25,000 lines. The rationale for these strategies revealed factors critical to successful assortment diversification i.e. retailers ranked the congruence of a new diversified range with the existing assortment and the retailer image as most important, but omitted to conduct any image research with consumers at this level. The implications of this were clear; most of the sample retailers had exited diversified market areas, with two major retailers returning to the same 'failed' market area within two years of deleting the range.

The findings still have value today as retailer assortment strategies suggest major shifts with online players such as Amazon demonstrating extreme diversification by introducing a fresh food offer. In contrast, the post-recession growth of convenience formats indicate major grocery retailers are contracting their assortments and space, by exploiting new formats and channels. The latter reinforces the conclusion that consumer behaviour "will force the supermarkets to revert to their core business" (**Hart, 1999,** p. 125).

Notably, the findings distinguished between core and non-core retail assortments, with the latter offering most scope for non-food assortment diversification. However, as supermarket food assortments reached saturation, a recurrent question was which non-food non-core assortments should complement the core food?

Paper 2: *Hart, C.A. and Davies, M.A. (1996a) Consumer Perceptions of Non-Food Assortments: An Empirical Study. Journal of Marketing Management, 12(4), pp. 297-312, ISSN: 0267-257X.*

Hart and Davies (1996a) sought to provide answers to the strategic challenges facing retailers, relating to assortment diversification, but from from the consumer perspective. Exploring the retailers' perceptions of assortments set the scene for a subsequent quantitative survey into consumer perceptions of non-food assortments in supermarkets. The key link between this study and the previous paper is the image congruity of non-food ranges with the core assortment. Specifically, do consumers distinguish separate images for non-core, non-food assortments in a supermarket, compared to those of core food? If retailers need to project a synergistic image, how far can supermarket assortments be diversified, before the store image, as perceived by the consumer, is seriously diluted?

This empirical study focused on supermarkets in part due to the grocers' non-food diversification strategies, but also the absence of image research for categories in grocery stores. A structured questionnaire was designed to measure consumer perceptions of three key variables; degree of fit or congruity, choice or depth available in each category; and importance for expansion across three established and three diversified non-food categories. A 5-point semantic differential scale measured the intensity of perceptions, combined with open-ended qualitative questions and rankings. Market research interviewers recruited 504 consumer respondents in an intercept survey across six major food retailers.

Capturing for the first time, consumers' images of supermarket product categories, the findings reported in **Hart and Davies (1996a)** showed variation in the seemingly uniform one-stop-shop supermarket environment. Significantly, the findings show that consumers perceive different images for core merchandise assortments compared with diversified assortments in the same store. Specifically, clothing and entertainment categories exhibited least fit with supermarket core assortments, due to offering insufficient depth of choice in a supermarket environment. The paper fills important gaps in the store image literature by (i) examining image at the product group or category level in supermarkets and (ii) capturing consumer perceptions of range 'fit' or compatibility with the retailer image.

Another useful contribution of this paper is that consumers appear subconsciously to divide supermarket assortments into three groups of core, non-core and peripheral merchandise; the latter group is considered least congruous with the store image. In an era of expanding assortments, the results suggest store image is over simplified and a new approach for measuring store image by core, non-core and peripheral product categories is recommended.

Paper 3: *Hart, C.A. and Davies, M.A. (1996b) The Location and Merchandising of Non-Food in Supermarkets. International Journal of Retail and Distribution Management, 24(3), pp. 17-25, ISSN: 0959-0552.*

Diversifying into new product categories provided additional challenges for retailers within the confined space limitations of supermarkets. The retailers had confirmed in earlier exploratory research that success of new range diversifications often depended on appropriate visual merchandising and location of new products (Hart 1994). Thus, a subsequent paper **(Hart and Davies 1996b)** based on the same consumer survey, examined how best to locate and display non-food assortments in supermarkets. Here consumer respondents evaluated a variety of different layout and display approaches for different non-food categories.

The existing retailer approach was to include non-food categories within the main shopping aisles of the supermarkets. However, this reduced customer experience by discouraging browsing. Locating comparison goods such as clothing, next to convenience goods within the same format, meant consumers were less likely to switch to browsing behaviour, due to their habitual shopping behaviour in a familiar supermarket environment.

The in-store locations for three established product categories, namely, household, health and beauty aids, and home products, were compared with display perceptions for three new non-food categories, that is; clothing, stationery and entertainment. The findings suggested that diversified non-food assortments dictate different merchandising needs in supermarkets. Notably, 1 in 5 shoppers preferred entertainment and clothing ranges displayed <u>separately</u> to the traditional supermarket grid layout. Four of the six categories are considered best displayed away from the conventional aisle locations suggesting that certain non-food diversifications do not mix well with food, requiring a more appropriate ambience conducive to browsing. Providing empirical evidence that diversified non-food assortments dictate different layout and merchandising approaches in supermarkets, this paper contributes to the debate emerging in the two previous papers. As supermarkets expanded in scale and generalized their assortments, offering a one-stop shop, consumers preferred the variety of shopping formats similar to that offered by the high street. This is perhaps due to supermarket shopping being traditionally viewed as a necessary but not always pleasurable experience. Overall, this study made an important contribution to the literature and highlighted the considerable scope for retail managers to develop more enjoyable shopping experiences through the creative merchandising of non-food items.

Paper 4: *Hart, C.A. and Rafiq, M. (2006) The Dimensions of Assortment: A Proposed Hierarchy of Assortment Decision Making. The International Review of Retail, Distribution and Consumer Research, 16(3), pp. 333-351, ISSN: 0959-3969. DOI: 10.1080/09593960600697063.*

As the assortment research progressed, it uncovered a number of theoretical inconsistencies. **Hart (1999)** highlighted the limited measures for categorizing and measuring assortment movement and consistency. **Hart and Davies (1996 a & b)** identified that assortments exist at a number of levels within and across stores yet the terminology and understanding of these within the literature were confused. The expanding assortments in the grocery and department store sector had exposed a conceptual gap regarding assortment composition. This ambiguity constrained any future application of assortment terminology or measurement, signifying a need to revisit the literature to clarify the strategic role of the assortment, and to conceptualise the relationship between assortment and image.

Hart (1999) called for a clearer categorization of ranges within the width of the assortment. **Hart and Rafiq (2006)** responded by reviewing 50 years of assortment literature, examining the composition and roles of assortment, while clarifying assortment terminology. Furthermore, it identifies an imbalance in operational versus strategic assortment research revealing a “lack of empirical and theoretical support for the strategic role of assortment” (p. 344). Crucially, the paper differentiates between the levels of category assortment and store assortment and their respective dimensions, proposing a hierarchy for assortment strategy decision making.

Drawing from the two key areas of assortment literature focus, it recommends assortment strategy is categorized into macro and micro levels using an *Assortment level research matrix*. The *Macro* level represents the strategic store assortment decision regarding the mix of departments or merchandise classes to offer. The second, *Micro* level represents the department or category assortment decision of the number of product lines to carry. Classifying past research, the matrix illustrates the micro (product-unit) focus attracts most research attention with only a handful of papers acknowledging the existence and importance of the macro-level of assortment (Cardozo, 1974; McGoldrick, 1979; Stewart and Hood, 1983; **Hart & Davies, 1996b**; Cadeaux, 1997; **Hart, 1999**). Through defining assortment, the composition and the dimensions by which it is described, the paper reveals that a fourth dimension, *consistency*, is neglected in the literature. In so doing, this extends the previous notion of image congruence through the elusive dimension of assortment consistency. Here the consistency of assortment i.e. the relatedness of merchandise categories from the consumer perspective is a potential indicator for controlling store image via a retailer's ability to match their assortments with the target consumer.

The paper contributes to retail theory by providing a comprehensive literature review, highlighting assortment ambiguity and confusion due to inconsistent use of the terms of width, breadth and variety within multiple layers of assortments. These terms and dimensions are clarified and defined for each assortment context. Notably, the paper presents a clear route for describing and quantifying the size and composition of a specific assortment, whether at the store or category level.

4.2 Retail image: Category behaviour and management

Paper 5*: Hart, C.A. and Dewsnap, B. (2001) An Exploratory Study of the Consumer Decision Process for Intimate Apparel. Journal of Fashion Marketing and Management, 5(2), pp.108-119, ISSN: 1361-2026. DOI:10.1108/EUM0000000007282.*

The next two papers in the portfolio expand the non-food context, probing deeper into category image via consumer behaviour and Category Management in a fashion apparel context. Specifically, **Hart and Dewsnap (2001)** explore in-depth the in-store consumer decision process for the intimate apparel (IA) category. The rationale for this study was to investigate consumer behaviour for a complex, yet highly personal category of IA, the bra. Surprisingly, only two previous studies (Richards and Sturman, 1977; Laurent and Kapferer, 1985) had focused explicitly on this category, yet industry and secondary literature suggested that IA presents considerable challenges to the consumer and retailer alike, warranting its own research agenda. An exploratory study was designed based on the high involvement decision process (Engel and Blackwell, 1982), in order to gain a 'holistic' and in-depth perspective of bra buyer behaviour and implications for retailers. Six focus groups involving 48 UK consumers utilized projective techniques, open discussion and blind test experiment were conducted nationally in the UK. The findings revealed that while retailers consider the product class to provide hedonic pleasure value, the consumer's purchase decision process is the reverse, even unpleasant. This is in stark contrast to the grocery retailers seeking to create a more pleasurable shopping experience in a convenience environment. Notably, the study finds that due to high involvement, IA behaviour relates to perceived risk, self-image and self-concept. For example, consumers seek congruence between their self-image and image of store staff and other consumers. This extends the previous notion of (retailer driven) image congruence between department image and the retailer brand image (**Hart 1999; Hart and Davies 1996a**), to the individual consumer in the retail store environment. Moreover, the personal nature of the bra suggested the majority of women prefer to shop alone for bras unlike the social interaction associated with outer fashion.

Another key contribution is this is the first study to examine the complete decision process of the bra buyer and the associated implications for retail management. Given the importance of function and fit, the findings show that assortment depth and stock availability are crucial factors influencing consumer purchase (e.g. style and size) along with brand image and style loyalty. Thus, previous insights from retailer assortment strategy (**Hart 1999; Hart and Davies 1996a; Hart and Rafiq 2006**) provide useful implications for assortment depth carried by retailers that will help strengthen the category and store image.

Paper 6: *Dewsnap, B. and Hart, C.A. (2004) Category Management: A New Approach for Fashion Marketing? European Journal of Marketing, 38(7), pp. 809-834, ISSN: 0309-0566. DOI: 10.1108/03090560410539267.*

Hart and Rafiq (2006) highlighted the assortment's emerging role in the practice of Category Management (CM). With continued range diversifications, there is a point at which assortments reach saturation and consumer perceptions of assortment variety then become more important than actual variety. For instance, Broniarczyk, Hoyer and McAlister (1998) found <u>reducing</u> the number of items could simplify consumer choice and increase sales for the category. CM uses in-depth information on the consumer to support joint marketing decisions for the category. While electronic point of sale (EPoS) systems provide volume sales data that is the "what" of category sales, CM depends on understanding the "why" and "how" of consumer behaviour. CM had been applied predominantly to grocery retailing, thus **Dewsnap and Hart (2004)** examined whether this established CM approach could be successfully transferred to fashion marketing. A key contribution of **Dewsnap and Hart (2004)** is demonstrating how consumer research findings can inform the CM process for a product category in the fashion sector. Fundamentally, CM Informs retailer approaches to managing assortments via usage-related categories, which offers significant benefits to fashion marketing by influencing consumer behaviour in-store. Deploying an in-depth understanding of the consumer for a particular category should therefore enable suppliers and retailers to move beyond "improved efficiency to improved consumer experience", through inspired consumer solutions Gruen (2002, p.18). Drawing from the same IA data set, the consumer responses were analysed and structured according to the category management research framework (Johnson, 1999). The objective was to understand customer motivations and the impact of point of purchase marketing mix variables.

The findings indicated that consumers typically sought a garment based on usage, or wearing occasion, in contrast to the retailer's product based view of categories - focusing on size and construction. A key challenge for IA retailers is managing an assortment of up to 60 sizes across a variety of styles in a range of colours. Thus, an important finding of this study is that by reducing the variety and number of SKUs within the functional bra category, the retailer is perceived to be less effective in meeting customer's needs. Surprisingly for an involved product, consumers undertook extensive information searches even when purchasing a replacement garment, largely due to discontinuation of styles and lack of size consistency. Limited availability in the right style / size then led to consumers convenience shopping and bulk buying when their chosen style was available.

4.3 Customer experience of retail environments

Paper 7: *Hart, C.A., Farrell, A.M., Stachow, G.B., Reed, G.M. and Cadogan, J.W. (2007a) Enjoyment of the Shopping Experience: Impact on Customers' Repatronage Intentions and Gender Influence. The Service Industries Journal, 27(5), pp. 583-604, ISSN: 0264-2069. DOI: 10.1080/02642060701411757.*

A common thread emerges in the previous two papers i.e. the need for and application of in-depth consumer insights to deliver a better offer and an improved customer experience, whether in store or another retail environment. Arguably, in order to provide a focused offer, town centres similarly need to address the same needs if they are to attract and retain customer patronage. **Hart *et al.* (2007a)** specifically focuses on how attractiveness of the town centre and enjoyment of the shopping experience can influence consumer behaviour and ultimately their re-patronage of that location. The study involved a comprehensive consumer intercept survey of 536 respondents in five regional centres, assessing four key dimensions of the shopping experience; accessibility, environment, atmosphere and service personnel. Forming part of a wider funded study into the East Midlands retail sector, this paper launched a new and very productive stream of town centre research.

The findings showed that enjoyment of the shopping experience is reflected in the above stated dimensions and has a significant, positive influence on consumers' repatronage intentions to town centres. However, contrary to previous gender based studies of shopping behaviour (Fischer and Arnold, 1994), we found a stronger relationship between shopping enjoyment and patronage for males, than for females. Indeed, we suggested that males' propensity to be decisive, efficient and time saving in their shopping behaviour, leads to greater loyalty to a shopping location. For women, enjoyment appears related to shopping as a leisure activity, including browsing, shopping around and availability of choice, which may reduce their loyalty to a specific retail location. The paper delivered important theoretical contributions to the literatures relating to gender differences in shopping and repatronage intentions. Further, it revealed early indicators that consumers behave differently in a town centre compared with, for example shopping malls. Accordingly, consumers' perceptions of town centre image will also differ to other retail locations.

Moreover, the findings suggested that shopping enjoyment may influence the time and money consumers are willing to spend in a shopping visit. The paper offers implications for managing consumers' experiences in a town centre with a need for town management partnerships "to coordinate the shopping experience ...so that customers' enjoyment is maximised" (p. 599). Notably, targeted marketing activity could build on shopping enjoyment to encourage greater patronage to town centres. These findings and recommendations were later substantiated with evidence from a subsequent ESRC funded town centre study (2014). Indeed, this paper provided the early foundation for three funded research awards and an impact case study (Hart and Stachow, 2013).

Paper 8: *Hart, C.A., Stachow, G.B., and Cadogan, J.W. (2013) Conceptualising town centre image and the customer experience. Journal of Marketing Management, 29(15-16), pp. 1753-1781, DOI: 10.1080/0267257X.2013.800900.*

Hart *et al.* (2007a) raised additional questions about how consumers perceive the image of town centres, considering the wider aspects of the public domain, physical environment and diverse mix of leisure, retail and services. **Hart, Stachow and Cadogan (2013)** aimed to examine the composition of town centre image and the constituent parts identified in the literature. Providing the first comprehensive review of the published town centre image literature, the meta-analysis evaluated the image attributes and dimensions employed. This initial contribution highlighted that reported numbers of town centre dimensions varied considerably from three to nine dimensions, with limited consistency between dimensions and their interpretation. Importantly, studies using store image measures to assess town centre patronage provided conflicting results. Concurring with Gautschi (1981), we argued that measures based on pre-specified attributes from other image contexts may lead to attribute omission by representing the researcher's assumptions, as opposed to the consumer's image perceptions. The image literature confirmed the need to measure image specific to the retail context and in so doing, exposed a crucial theoretical gap – the lack of empirically established image variables pertinent to the town centre environment.

Indeed, criticisms of "pre-selected, imposed image attributes" suggest that structured measures fail to capture the gestalt of image. The paper's next contribution to theory is proposing a model of town centre image, to facilitate image conceptualisation. In one of the few studies to elicit empirically the consumer descriptors of store image, Zimmer and Golden (1988) found that consumers view store image in terms of both attributes and "global impressions". Adapting the Zimmer and Golden methodology, our study then elicited 2013 open-ended descriptors of town centre image from the same data set of 536 respondents. Extensive content analysis and replication by six independent coders generated a final set of 38 categories contained within eight dimensions of town centre image. Significantly, we identified new, consumer-generated dimensions and attributes that underpin a broader image construct than previously assumed. Interestingly, our results revealed the largest, new dimension of "global impressions", which reinforced Zimmer and Golden's (1988) finding, and confirmed the gestalt nature of town centre image. This represented a first attempt to conceptualise a more holistic image, in a town centre context, supporting future image operationalisation.

Yet, customer perceptions of a location image do not operate in isolation and develop through experience of that location (MacInnis and Price, 1987). The emerging customer experience concept (Verhoef *et al.* 2009) suggested an overlap with image, and a secondary objective was thus to explore customer experience as a guiding framework for conceptualising the wider town centre context of image. In summary, the paper delivered important new contributions to research, theory and practice by: (i) Proposing a model of town centre image; (ii) Identifying empirically the consumer-generated dimensions and attributes driving town centre image; (iii) Revealing the neglected psychological, intangible elements that reinforce the holistic, gestalt of town centre image; and, (iv) Confirming town centre image as a broader construct and the need to measure image specific to the retail context. Fundamentally, the image construct provides the basis for understanding and managing the customer experience in the town centre.

5. Discussion of the Portfolio Papers: Contributions, limitations and future research agenda.

Each of the research themes discussed above has vital relevance to retail marketing strategy and collectively the three themes interlink at different levels in the retail environment. This section summarizes the overall contribution of the portfolio, highlighting the linkages between the papers and research themes, including associated follow on work. The section concludes with a summary of the limitations inherent in this body of work, and an agenda for future research.

5.1 Summary of research contributions

When commencing the assortment research in this thesis, the existing literature focused on analysing and managing individual products within the overall assortment, for example which SKUs should be carried within a store (Simonson, 1999; Rajaram, 2001). At that time, there was limited empirical support for assortment strategy decisions; understanding of consumers' perceptions of the mix of categories carried in a store; or any consistent approach to describing assortment composition and movement.

Spanning a 10-year period from 1996-2006, the assortment research included in this thesis sought to address these gaps. By capturing retail assortment movement, **Hart (1999)** demonstrated new evidence for the retail accordion theory by analysing the retailers' "accordion-like expansions and withdrawals" (McGoldrick, 2002, p. 159). While the retail accordion may be considered inexact as an explanatory model, factors indicating the limits of assortment diversification identified by **Hart (1999)**, provide clear insights to the boundaries and risks of merchandise scrambling, "*where continual expansion of new and unrelated lines may result in eventual assortment contraction*" (Fernie, Fernie and Moore, 2015, p. 35).

Recent literature and texts explain practitioner buying policy and practice, yet offer few new theoretical insights for guiding assortment strategy. Thus, **Hart and Rafiq (2006)** fills a crucial theoretical gap in the literature, by clarifying assortment theory (Varley and Rafiq 2014; Goworek and McGoldrick 2015, p. 91) and for categorising the macro and micro levels of assortment research. From a macro assortment perspective, Samli (1989) recommends internal consistency across the width of an assortment is essential for the retailer to project a uniform, synergistic image. Yet the means for measuring and managing assortment consistency to match existing or new assortments with the target consumer remains unresolved in the literature.

In addition to contributing to the literature gaps identified in Section 3.1, the first four papers clarify the strategic relationship between retail assortment and image. Specifically, **Hart (1999)** lends support to assortment decisions by demonstrating the need for image congruence of a new diversified range with the existing assortment and the retailer image. **Hart and Davies (1996a and 1996b)** develop the link by identifying that consumers form perceptions of non-food categories in supermarket environments. For example, **Hart and Davies (1996a)** find that consumers perceive different images for non-food categories within supermarkets, despite being within the same supermarket format. Yet the way in which the non-core categories are located and merchandised in a supermarket can affect how consumers perceive the category (**Hart and Davies 1996b)**. Finally, as noted above, **Hart and Rafiq (2006)** recognize that as assortments diversify and shift over time, this signifies a need to manage the consistency of different category images within the width of the assortment.

Despite the increasing availability of retail data, assortment planning remains a challenging task for retailers (Mantrala *et al.* 2009). Indeed, the growth of online assortments adds more complexity, particularly for multi-channel retailers. Recent literature therefore extends the stream of micro level research (Kahn, Weingarten and Townsend, 2013) as researchers investigate perceived variety in an online store and consumer centric perspectives of assortment (Chang, 2011). Indeed, responding to the call by **Hart and Rafiq (2006)** for a more sensitive form of assortment measurement, Bauer, Kotouc and Rudolf (2012) build on our assortment research to develop a grocery assortment perception scale (GAP) incorporating the consumer perspective in an assortment measure.

By 2000, category assortments were playing an increasing role within store image (Ailawadi and Keller, 2004). The portfolio theme of "Retail image: Category behaviour and management", shifts the focus from the retailer-supply perspective to the consumer-demand perspective, examining consumer behaviour for a high involvement product category and the reciprocal influence of image **(Hart and Dewsnap, 2001).** This in-depth approach captured for the first time, unique insights of consumer behaviour and attitudes to the intimate apparel (IA) bra category, previously overlooked by the retailer and academics. The findings contrasted particularly with the hitherto image focus on supermarket categories, illustrating a new application of image congruence i.e. between customers' self-image, image of store staff and other consumers. Thus, the paper contributed to addressing the literature gaps identified in Section 3.2, regarding understanding the relationships between different image contexts such as category image and store image, and the influence of brands to category image. Summarising the most significant contribution, **Hart and Dewsnap (2001)** were; "*the first to explore the consumer decision process for the bra and its relation to women's involvement and self-concept gave very important insights to the psychological elements acting as mediators throughout the process of bra purchasing*" (Yip *et al.* 2011, p. 1106). Notably, the paper stimulated a new stream of literature [36 citations[2]] that included consumer behaviour research for IA and fashion categories in USA and Australia, Hong Kong and Korea, to South Africa and Portugal. A number of these studies applied aspects of the **Hart and Dewsnap (2001)** research approach (*c.f.* Risius *et al.* 2012; Robinson and Doss, 2011), and others were based explicitly on

[2] Per Google Scholar

the **Hart and Dewsnap (2001)** IA qualitative research framework (Law and Yip 2010; Law, Wong and Yip, 2012).

The previous paper suggested implications for retail management, which are explored further in **Dewsnap and Hart (2004)**. Collecting in-depth consumer data for the intimate apparel category provided ideal opportunity to analyse the potential for transferring the category management approach to the fashion sector. The study findings established that consumer usage and behaviour for the mostly functional, IA category differed to outer fashion categories. Indeed, it showed that category management has significant value to usage related fashion categories to facilitate i) optimizing assortments, sales space and display; ii) extending time for wearer evaluation of new products, iii) stock management responses to maximize product availability. Fundamentally, the study demonstrated the importance of consumer research to inform the effective management of fashion merchandise categories and to improve customer experience in-store. The contribution of these two papers was three fold; delivering consumer behaviour insights for the brand supplier, improved category understanding for the retailer, combined with impact on theory (Varley, 2006; Goworek and McGoldrick, 2015).

Reviewing the extant literature, **Dewsnap and Hart (2004)** noted limited empirical research studies on CM. Since then, the number of published articles has increased, yet with few additional empirical contributions. Holweg, Schnedlitz and Teller (2009) categorises the existing CM literature into seven research streams, noting the generic CM approach may not be applicable to all retail product categories. By presenting one of the first empirical consumer studies to apply CM to fashion categories, **Dewsnap and Hart (2004)** encouraged a new literature stream of CM research in the fashion and grocery sector [60 citations]. Specifically, Sheridan, Moore and Nobbs (2006) develops the above application of CM by examining its role and application in the Fast Fashion retail sector. Furthermore, the brand manufacturer-retailer dynamic and power in CM relationships are explored by various authors in Finland, Sweden and Australia (Lindblom and Olkkonen, 2008; Lindblom *et al.* 2009; Glynn, 2007).

The thesis examines four different image contexts. Starting with store image, it probes deeper into category and department image (see also Hart and Rafiq, 2004), before, finally, expanding to town centre image. As noted in Section 3.2, the town centre is the most complex yet underexplored image context as it encompasses all other levels of retail image, from product brands, categories, retail stores, to in-town shopping malls. **Hart *et al.* (2007a)** therefore filled a crucial literature gap by examining the factors contributing to consumers' town centre image and its influence on consumer behaviour and patronage decisions [80 citations]. The paper particularly demonstrates the emerging importance of experiential factors such as enjoyment of the shopping experience.

The portfolio papers illustrate the two most cited characteristics of retail image; comprising tangible or functional attributes relating to physical features, and intangible attributes representing atmospheric or psychological features (Martineau 1958). Papers 1-4 demonstrate the assortment's functional role in image, fulfilling utility of the shopping experience. Yet as **Hart and Rafiq (2006)** suggest, retailers also need to focus on improving the experiential aspects of store visits, to increase the entertainment value of shopping. Papers 5-8 explore further these intangible, more experiential factors. The existing image literature emphasizes the effects of physical design elements or atmospherics on customers' behavioural responses in the retail location **(Hart *et al.* 2007a)**. However, experience is a broader construct and prior to 2013, lacked conceptualization in the wider retail location.

The findings by **Hart, Stachow and Cadogan (2013)** reveal a multi-faceted image construct and the neglected psychological, intangible elements of retail image. By eliciting empirically the image variables pertinent to the town centre, it addresses a key literature gap and shows that the literature emphasis on measuring the largely tangible, functional dimensions of town centre image is overstated. Indeed, since functional measures do not sufficiently capture the emotional responses leading to image perceptions (Bell, 1999), these findings have important implications for measuring and operationalising *all* retail image contexts. As such, this paper builds upon and forms a 'capstone' to the previous seven papers in the portfolio.

The portfolio research theme of customer experience, emerged from the image research and is still evolving, through the town centre context. **Hart, Stachow and Cadogan (2013)** conceptualises town centre image as involving the customer's cognitive / physical, sensory / affective and social image responses to the totality of the town centre experience. Papers 7 and 8 thus develop and contribute to this emerging body of literature. **Hart *et al.* (2007a)** introduces the notion of the customer shopping experience in town centres, finding a stronger relationship between shopping enjoyment and patronage for males than females. Subsequent literature that builds on the **Hart *et al.* (2007a)** findings, investigates the impact of gender differences in shopping enjoyment (Brosdahl and Carpenter, 2011; Kotzé *et al.* 2012) and heterogeneity of gender perceptions of shopping environments (Teller and Thompson, 2012). More recent authors study the antecedents of retail customer experience (Bagdore, 2013), and experience perceptions and outcomes (Foster and McLelland, 2015).

Examining the town centre context reveals potential relationships across other image contexts. Figure 1 illustrates visually the highly interconnected nature of the research themes, which permeate the eight papers presented within this thesis. Store image is the link between the customer experience and assortment. The retail store environment is where the experience takes place (Burt and Davies, 2010) and includes different levels of assortment and categories. Importantly, as identified by **Hart, Stachow and Cadogan (2013),** store images transfer and influence consumers' experiences and perceptions of the town centre.

Research supplementary to the portfolio papers, confirms the assortment's pivotal role in retail image, underpinning retail strategy. Hart (2009) demonstrates that assortment is the most consistent factor across all contexts of retail image including the category, department, store, mall and town centre images. Further, the paper proposes that different image contexts may be interlinked through the assortment dimension to help achieve image congruence.

The customer experience research theme integrates the assortment and store image research. The consumers' perceptions of stores and assortments translate into memorable touch points in their experience journeys. This research theme thus complements the overtly functional perspective, with the experiential approach. As retailers and town centres compete increasingly with other locations, formats and online shopping, the experiential dimension offers most potential for competitive advantage (Anteblian, Filser and Roederer, 2014).

Cutting across the three themes is the need for retailers to manage and control image, assortments and the customer experience, represented in the overlapping segment of “management”. Finally, the notion of consumer perceptions, underpins the three themes implicitly. The unifying characteristic throughout the research is how consumers perceive different retail environments and their assortments.

This section has discussed the linkages across the portfolio and summarised the collective contribution of the eight papers. In so doing, it delivers the final contribution of the thesis; the connectivity across what were previously assumed to be separate and distinct research domains, namely retail image, retail assortment and customer experience

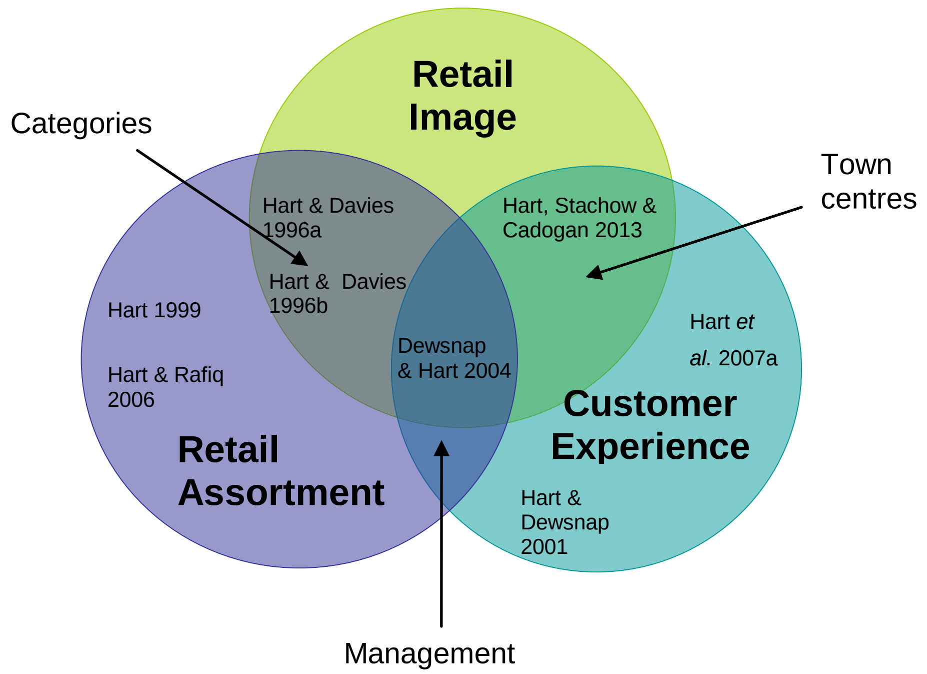

Figure 1 The Interlinking Research Themes

5.2 Research limitations

Methodologically, the earlier thesis papers were limited by the available conceptualisation and measures at that time. Tracking or synthesizing assortment movement is a fine art, at best inaccurate due to the inexact measure of "number of lines" and sample of assortments and retailers studied in **Hart (1999)**. Capturing and measuring image is similarly imprecise and the early reported studies (**Hart and Davies 1996a; Hart and Davies 1996b**) adopted existing image techniques such as Semantic Differential Scaling (SDS) to rate consumers' image perceptions for different categories across retail stores. While considered the most popular image scaling technique, SDS is also criticised for only measuring the "objective reality" represented by image attributes (Keaveney and Hunt, 1992 p.167). Indeed, many shortcomings of image measurement are due to ill-conceived attitude scales that force responses to items that do not necessarily represent the image being captured (Gautschi,1981). After 60 years of image studies, **Hart, Stachow and Cadogan (2013)** questioned the traditional retail image approaches, thus setting the scene for a new phase of image research – a dynamic, experiential approach that encompasses perceptions of the total experience.

This thesis has focused on image perceptions of different retail environments and it is not within its scope to discuss the role or perceptions of brands within retail image or the consumer formation of image. However, work additional to the portfolio examines these and other related areas (Hart, 2009; Stachow and Hart, 2010; Hart, Smith and French, 2011).

Throughout, the emphasis has remained on perceptions associated with physical retail environments, as opposed to online retailing or virtual experiences. Clearly, the rapid growth of all forms of digital media and online consumer behaviour will have implications for retail assortments, image and customer experience. These aspects are discussed further in the next section.

5.3 Impact and research agenda

The town centre customer experience research was timely due to the post-recession impact of a declining UK high street and the urgent call to understand changing consumer behaviour in town centres (Portas, 2011). While the retail industry generates considerable market research data at an aggregate level, detailed and individualised customer data is not gathered or applied at the town centre level. Hence, understanding of consumer behaviour in town centres is lacking and with this, the means for capturing and measuring consistently the consumers' perceptions, in order to increase town centre attraction, patronage and performance (Wrigley and Lambiri, 2015).

The last two thesis papers formed the basis for a REF impact case (Hart and Stachow, 2013), and three successful grant applications focusing on the "Customer experience of town centres". The first two grants were funded by the ESRC and supported by six industry co-investment partners (Argos, Association of Convenience Stores, Boots, British Retail Consortium, Action for Market Towns and the Loughborough BID). The Loughborough University Enterprise Project

Group funded the third study involving a location analytics company collaborator. In total, my town centre experience research generated £235,575 of research funding in the three years 2012-2015. The subsequent output (*c.f.* Hart *et al.*, 2014; Hart, 2015) created wide impact amongst Government Departments, Local Authorities, Industry bodies, major retailers, local town centre partnerships and BID teams.

The above funding resulted in three research studies involving:

1. An exploratory study investigating how 180 consumer respondents experienced six different town centres during a 4-week in-depth "tracking study" across six UK locations.
2. Developing a scale to capture and measure the functional and experiential touch points of the customer experience using a confirmatory study of 1530 consumer respondents, across 10 town centres.
3. Testing and implementing a practical town centre consumer "tool" to capture and track customer experience consistently on a large scale i.e. using a mobile app and cloud based impact dashboard for easy administration and reporting.

Thus, as my research evolved from the hitherto functional to experiential perspective of image and the customer experience, it filled an immediate, real-world research need, generating greater interest, attracting the wider, practitioner audience. From a theoretical perspective, the above recent research contributes to the final two literature gaps identified in Section 3.3. Hart *et al.* (2014) draws explicitly from the findings of **Hart, Stachow and Cadogan (2013)** to investigate the nature of the customer experience within and across an agglomeration of retail stores in a town centre. Notably, the three studies confirm that the customer experience journey comprises *both* functional and experiential touch points. This combined with current town centre research activity and emerging outputs provide new, empirical evidence regarding the composition of customer experience and how this may be captured and measured in a retail setting.

Each of the three research themes offers potential for further research and it is worth noting particularly interesting areas emerging from the thesis, pertinent to current retail marketing research. The 17 years of the research period witnessed the fastest growing phase of online assortments, benefitting from seemingly unlimited physical shelf space combined with lower operating costs and barriers to entry. Here store image plays an important role differentiating a physical retailer offer from its online competition. For multichannel retailers, the need for image congruence between a retailer's online and offline assortments becomes more relevant. An earlier parallel collaboration applied my research insights in an online context (*c.f.* Hart, Doherty and Ellis-Chadwick, 2000; Doherty, Ellis-Chadwick and Hart, 2003) which suggests future research direction. For example; in the current environment, with contracting retail space and competitive pressure to diversify into profitable markets, at what point should physical merchandise assortments transfer online? Under what circumstances do consumers consider online diversifications incongruent to the core assortment and retailer image?

The customer experience journey involves both physical and virtual interactions across multiple channels. The ESRC research explored the role of digital in the town centre and the extent to which online and digital activity is replacing or enhancing the physical shopping experience. The findings revealed the town centre digital experience is underdeveloped and as a result, the town centre customer experience is fragmented, perceived as a collection of separate experiences with individual retailers (Hart *et al.* 2014; Hart and Laing, 2014). How can digital shape future consumer journeys in town centres?

Echoing the academic literature, retailers and high streets typically focus on consumer interactions with the physical, tangible aspects such as parking and access. Yet consumers' reasons for visiting retailers and town centres extend beyond purely functional outcomes, to include satisfaction, emotions and enjoyment. This offers further potential for customer experience research. Specifically, what is the relationship between touch points and how can the customer experience journey be measured? There is need to quantify consumers' perceived importance of each touch point for different types of experiences. This knowledge would then inform retailers and town centre stakeholders of priority touch points, guide their strategy at a local level and facilitate measuring change in consumers' perceptions over time. Understanding the value of experiential touch points to specific market segments, would then help create distinctive customer experiences.

Finally, digital provides the means for linking the touch points of the customer experience. It also offers scope to capture, measure and influence positively, the consumers perceptions and images of retail environments and further work is underway to investigate how consumers' combine their physical and virtual experiences.

5.4 Concluding remarks

This commentary provided an overview of the theoretical context for the thesis. It evaluated three interlinking research areas of retail assortment, retail image and customer experience and the associated gaps within each literature stream. Eight published papers comprising the thesis were then introduced. This followed with a summary of the rationale, key findings and contribution for each individual paper.

Collectively, the thesis delivers a significant research contribution. It focuses on a core area of research activity, investigating perceptions of assortments and image in different retail contexts and how this contributes new understanding to knowledge and theory. The first four papers clarify strategic relationships between retail assortment and image. Examining consumer behaviour and perceptions for an unexplored apparel category, the following two papers identify new perspectives of image congruence, relationships between category and store image and implications for category management. The final two papers consolidate all previous contexts in a multi-faceted retail image construct, emphasising previously neglected psychological image elements. Fundamentally, consumers' experiences in town centre retail environments contribute to the ongoing process of "holistic" image creation.

As retail environments change, consumers' perceptions of these have also changed. Consequently, this thesis highlighted particularly how consumer perceptions of retail environments evolved from the largely functional, static image perspective, to a more dynamic, experiential conceptualisation, encompassing the customer experience. It is vital that future research identifies how to capture and understand how these perceptions translate into actual behaviour, in order to create appropriate marketing strategies to maximise customer value.

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The Retail Accordion and Assortment Strategies: An Exploratory Study

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Abstract

Retailer merchandise assortments need to be constantly reviewed and developed to retain existing and attract new customers. Diversification and specialisation are two extreme assortment strategies which are periodically pursued by retailers, forming the basis of the Retail Accordion Theory. While this theory attempts to synthesise the patterns of diversification and specialisation, empirical research into the factors explaining variations in diversification and specialisation decisions tends to be sparse and anecdotal. This paper focuses on the rationale behind the contrasting assortment strategies of two retail sectors. It presents an exploratory study of ten UK retail multiples. The results of in-depth interviews with senior managers are discussed, the possible constraints on portfolio innovation are determined and the retailer perceptions of the extent of diversification are identified.

KEY WORDS

Assortment, merchandise strategy, Retail Accordion.

Paper 1. The Retail Accordion and Assortment Strategies: An Exploratory Study

Introduction

As UK retailers battle with an increasingly competitive retail environment, marketing and merchandising strategies are experiencing constant change. In particular, range assortments are continually under review in order to identify an optimum selection - not only to attract shoppers and build loyalty, but also to maximise profits from frequently limited space.

Observation of the UK retail sector has highlighted conflicting directions within merchandising strategies. On the one hand major multiple food retailers are expanding ranges into more non-food areas, including clothing, entertainment, stationery and pharmacy. Other large multiples appear, however, to be moving in the opposite direction with major range rationalisation programmes.

Observations of similar historical trends in specialisation vs. diversification have been made before, and literature on the Accordion Theory has attempted to synthesise such patterns. However, empirical research into the factors explaining variations in diversification and specialisation decisions tends to be sparse and anecdotal. This is partly due to the lack of historical statistics on merchandise assortment movement, and partly the result of practitioners' reluctance to divulge company policy.

This paper focuses on attempting to understand more about the dynamics behind the current directions in merchandise strategy. In particular, the criteria behind range introductions and deletions, the specific reasons for introducing new lines, and the constraints within which decision-makers operate, are explored. A key aim of this paper is to compare and contrast the strategic assortment approaches of food multiples against mixed businesses, and to identify the different factors at play.

Documentation of previous assortment strategies within the sectors are reviewed in the next section. This is followed by sections which explain the methodology used and the results obtained. The final section concludes by offering implications and directions for future research.

Retailer merchandise strategies

The major food multiples have, during the mid 1980’s to 1990’s, experienced a period of rapid market growth and profitability, described as the ‘golden age’ of food retailing (Wrigley 1991). This was followed by an era of ‘store wars’in which the major food multiples first competed for development sites (Wrigley 1994, Guy 1994) and then consumer loyalty through price, service, and promotion. This accelerated expansion fostered criticisms that the supermarket offerings had converged with a lack of differentiation between the major multiples (Drummond, 1995).

One way in which some food multiples have sought to develop competitive advantage is through product diversification. The "George" clothing range at Asda was identified as a key area of growth for Asda (Bagnall 1995); Tesco deepened their non-food range in 1995 to include entertainment and toy "shops"; In the same year, Sainsbury's introduced the Delia Smith speciality cookware range and Safeway developed a baby wear range. Other supermarket assortments organically expanded to offer consumers a one-stop-shop and value added ranges. More recently, Sainsbury’s have expanded into financial services and banking. It appeared that most major food multiples strategically shifted the product mix to include higher margin non-food items and services when consumer expenditure on food was currently static.

In the early 1990s the number of non-food lines increased as a direct result of the increase in store sizes. Typically, the ratio of multiples food: non-food by sales area was approximately 90:10 for 25,000 square feet of sales area, compared to 55:45 for a store >50,000 square feet (source IGD). The combined average selling area devoted to non-food has been estimated at 19% and is predicted to rise to 29% by 2001 (Davidson, 1995).

The strategic decision of which non-food area(s) to expand may depend on a number of factors. Traditionally, the success factors for diversification have been determined by those areas which could provide volume, linked sales with the core business, combined with potential for market growth. Petrol retailing represented a successful diversification which resulted in the food multiples securing 25% of the petrol market. While fast moving lines such as toiletries, stationery and news offered success through cross selling and scrambled merchandising, high ticket non-food lines such as electrical goods represented greater risks and were deleted from some superstore assortments.

Earlier, during the late 1970s' to mid 1980's, mixed retail businesses followed a similar route. WH Smiths for example, developed a logical progression from newspapers to periodicals and books, and from stationery to leisure goods including home computers. Boots introduced entertainment, a cookshop and home products. Woolworths was possibly the most documented case of diversification, whose merchandise assortment had continually expanded in order to remain competitive, with the inclusion of furniture, toys, entertainment, clothing and cosmetics.

In the late 1980s to mid 1990s, many of the mixed retailers followed a period of rationalisation within their assortments by deleting a number of product ranges (Brown, 1988, McGoldrick 1990, Retail Week 1993). These strategies were in direct contrast with the assortment strategies of the food multiples during the same period. The reasoning behind these range rationalisations may be attributed to a combination of the changing economic and competitive environment and the shifting of emphasis from the high street to out of town shopping. Retail theorists may suggest otherwise, that these assortment movements are part of a cyclical pattern repeated over a period of time (Hollander1966, Brown 1987).

Specialisation Vs Diversification

McGoldrick (1990) summarised the two main alternatives in product assortment strategy to be increased diversification or greater specialisation which aim to "provide consumers with a greater choice in breadth or in depth". For some retailers, specialisation is seen as the main means of survival whereas for others, diversification is seen as the main form of growth.

A retailer assortment profile comprising width, depth, coherence, availability and quality, is initially designed to achieve the desired market positioning strategy (Knee and Walters 1988). Over time, however, the assortment may no longer meet the changing needs of the target market and it may be necessary to adopt one of four merchandising strategies of range rationalisation, repositioning, growth or diversification (Cook and Walters 1991). Range rationalisation is the common route followed by most retailers, and includes the ongoing review of assortments and minor adjustments necessary to meet the retailer's market position and profit targets. It may include eliminating and even replacing entire product ranges. Repositioning involves adjusting the product mix to "address the specific needs of a market segment more effectively" (Ibid 1991). Three levels of repositioning have been identified, zero, gradual, and radical repositioning (Corstjens and Doyle1989). Zero repositioning is where the retailer maintains continued focus on its initial target segment despite a changing retail environment. Gradual repositioning includes the small merchandise adjustments required to maintain a continuous match between the market and its own offer. Radical repositioning occurs when the retailer makes a major shift into new target markets. It can be the result of a shift in the marketing environment or because "its management have failed to effectively gradually reposition over a long period".

A growth merchandise strategy is achieved by adding ranges to the existing assortment and may be product or market led. By drawing upon the company's existing strengths it offers the lowest risk strategy. In contrast, diversification is the most extreme strategy involving totally new merchandise ranges and markets. In evaluating the available strategic choices, a retailer has to consider its existing expertise in the area and the level of service support required for the merchandise. Omura (1986) suggested a 20 celled matrix in which each cell offered varying levels of risk. Cell1, was a low risk greater penetration of its current market with existing merchandise, leading to extreme diversification in cell 20, in which new merchandise requiring new service requirements, appealed to different market needs. Two main forms of diversification have been noted. A form of skimming or

“Creaming”(Gist 1968), adopts the best high volume brands from other retailers lines with the result of generalising the assortment. “Scrambling” by contrast, is when the “quest for goods carrying better than average margins has led retailers into product fields far away from their customary lines” (Gist 1968). The skimming process adds small but sure profits, whereas scrambling involves large but unsure profits.

It is noticeable that the product-mission matrix originally developed by Ansoff (1965), has formed the basis for further frameworks applied to assortment strategy (Kristenson 1983, Omura 1986, Cook and Walters 1991) with the added ingredient of risk. Although risk, combined with existing skills and expertise, is a high factor in evaluating a merchandise strategy, it has not proved sufficient to deter retailers from attempting extreme merchandise diversifications such as retailing cars through department stores (Hollander 1966) or supermarkets (Poynor 1986).

The Retail Accordion

The extent to which some retailers have pursued diversification and specialisation assortment strategies was originally observed by Hower (1943) and developed by Hollander (1966) in relation to the Accordion Theory. Hollander noted a number of factors that encouraged specialisation, using the orchestra analogy whereby "at any one moment some players are retiring from the orchestra while others (mainly with compressed instruments) are joining the band”.

Furthermore, he identified three phenomena occurring in the process of specialisation; unsuccessful merchandise mixes which have encountered "insurmountable limitations", the deletion of conventional lines from the retail assortment and the market growth of a product area is adopted by new specialists. These phenomena have also been observed in the 1980s - 1990s (McGoldrick 1990, Brown 1988).

More specifically, Hollander noted five possible forces which may influence the contraction of an assortment constraining the opportunities for diversification.

i) Non-economic - from personal interest, expertise and enthusiasm

ii) Restraints - whereby retailers avoid raiding each other's assortments from fear of retaliation or legal limitations.

iii) Capacity - the available capital and resources do not permit merchandise expansion.

iv) Costs - adding classifications to an assortment may cause costs to grow at a faster rate than revenue.

v) The market - consumers behaviour may encourage specialisation.

Hollander also suggested that certain combinations may be incongruous or incompatible with each other.

While other similar examples of specialisation and diversification have been observed occurring either simultaneously or sequentially, there is a lack of any empirical evidence to support these observations. Indeed, the hypothesised perpetual alternation between generalist and specialist outlets has yet to be proved. Brown (1988), argued that the most significant applications of these conceptualisations is to individual retail firms but the value of the theory lies rooted in relation to a number of, or sector of retailers.

It is interesting to observe that in the 32 years since Hollander's Notes on the Accordion (1966), few attempts have been made to synthesise retail assortment movements. Indeed, compared with other extensively argued cyclical theories (Brown 1991) the Accordion has been somewhat neglected. It is also evident from recent strategies that retailers continue in their struggle with assortment diversifications. For some companies, considering the levels of risk involved, the initial dilemma lies in identifying the direction and extent of product diversification.

These factors have prompted investigation into the retailer reasoning behind expansions and contractions within assortments. Exploration of the rationale behind some of the moves may determine possible success criteria for new ranges, and conversely the criteria for deleting failed ranges. Furthermore, an examination of the constraints to diversification within different sectors, might also provide a valuable insight into the limitations of assortment diversification.

The Study

Two key objectives formed the basis of this exploratory study. The first objective was to examine the movement of assortments over a given period of time. The second objective was to determine the reasoning behind some of the major diversification decisions to expand into new market areas, and conversely, the specialisation decisions for exiting other areas.

In order to track the movements of retail assortments, a form of measurement was required. According to the literature, the dimensions of product assortments included “width, depth and coherence” (Knee and Walters 1988). The latter dimension being the most intangible and difficult to measure, the first two offered greater scope in translation to number of categories (width), and product lines (depth). Category expansion and contraction might also be measured via the different ‘vectors’ or variety of product groups introduced and deleted. In evaluating these dimensions, pilot interviews identified that few retailers held detailed product data beyond the previous two or three years. Furthermore, this data was usually held at the category level and would thus need to be collated aggregately to provide a picture of the total assortment. Moreover, it was necessary to find a unit of measurement which could be comparative across retailers and sectors. Previous studies in this area (Hollander, 1966) resorted to the "number of lines" to describe the size of the assortment, without actually recording the measurement. While limited, this measure provided a transferable unit which could be used on two dimensions; first, to record the relative change in number of product lines / size of the assortment by each retailer, over a ten year period. Second, to compare assortment movement across sectors. The relative change in product lines was expressed as a ratio.

The study concentrated on two broad retail sectors, food and mixed retailing. The earlier literature identified in a previous section, suggested that a number of mixed retailers had rationalised their ranges. Whereas the food retailers appeared to be diversifying. The study sought to test whether these movements were happening in isolation, or whether any noticeable trends were discernible. These sectors were also selected for maximum comparison; the UK food retailers comprise the largest and most concentrated retail sector, which by definition could be termed specialists due to their depth of food ranges. In contrast, the mixed retail sector, includes wide but shallower assortments and variety stores, experiencing considerable movement of ranges. Within these two sectors, a number of retailers were contacted with the final sample comprising ten major UK multiple retailers including three food retailers, one food discount operation, one hypermarket, two mixed retailers, a variety store, a stationer and a chemist. The sample represented 34 per cent of the UK grocery market (Henderson Crosthwaite,1993). The representative market share of the mixed retailers was more difficult to define given their involvement in a variety of markets. The sample included established retailers who had been active in their respective sectors and could thus provide historical evidence of assortment development.

Due to the limitations experienced in measuring category movement, an alternative method of researching product diversification and specialization was explored. In-depth analysis on the behaviour of a single firm combined with comparative studies across different retail firms has been described as the "best option" for collecting empirical evidence of retailer criteria (Pellegrini and Zanderighi 1990). Thus, depth interviews were chosen as the most effective means of achieving an insight into the retailer reasoning behind the diversification / specialisation decisions. Personal interviews were conducted with senior personnel or individuals who were directly involved in, or responsible for selecting or deleting product ranges. A variety of respondents were selected who could offer a broad perspective including trading directors, marketing managers, senior buyers and merchandisers.

The interviews were semi-structured including 20 key open-ended questions to facilitate comparisons. The questions were broadly categorised under four themes:

i) Key assortment movements pursued during the previous 5-10 year period, including introductions and deletion of product ranges;
ii) The responsibility and rationale for these range decisions;
iii) Nature and extent of research prior to entering new market areas; and
iii) Perception of constraints to diversified ranges.

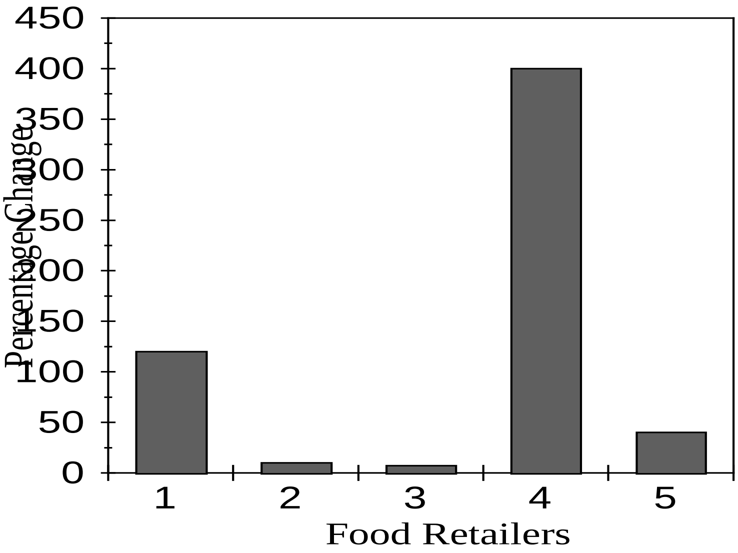
The questions were first pilot tested on a small representative sample, then modified for the final interviews. Where possible more than one individual was interviewed from each organisation. Thirteen interviews produced 16 hours of taped discussion for transcription and content analysis. The interviews were carried out during May and June 1993.

Results and Discussion

In respect of the requests for anonymity, the retailers will be referred to as "Food A,B,C,D, or E" and "Mixed A,B,C,D or E" in the following sections.

Each retailer gave a total figure for current product lines compared with the total number of lines 10 years previously. Examining the percentage change in product lines across both retail sectors there is seen to be a clear difference in trends between the sample of food and mixed retail businesses in the sample. Figure 2 illustrates that the food retailers had all expanded their lines from a minimum of 7% to a maximum of 400%. The relative number of lines also varied. Food A demonstrated 120% growth from 9,000 lines in 1984 to 20,000 lines in 1994; Food B, indicating a 10% growth had expanded from 22,500 lines to 25,000 lines. In the most extreme case, Food D had expanded 400% from 600 lines to 3000 lines.

Figure 2 Food Retailer Growth in Product Lines, 1984 - 1994

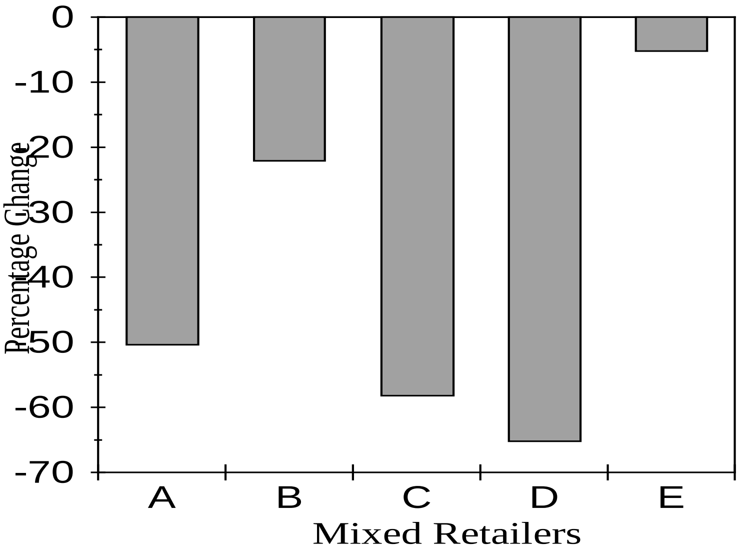


Interestingly, an optimum limit of 25,000 lines appeared to have been reached by the food retailers generally, although not all stores carried the full range. These figures may be related to the growth in store sales area which peaked during the time of the study. Furthermore, the overall increase in lines during this period could be attributed to the more sophisticated space modelling and sales based ordering systems which have enabled a higher concentration of lines per square foot resulting in more effective space utilisation.

In contrast, all of the mixed retailers had contracted their lines by a minimum of 5% to a maximum of 65%. (Figure 3) As an indication of the relative number of lines carried, Mixed A reduced its assortment from 70,000 to 25,000 lines and Mixed C from 50,000 to 20,000 lines. It is interesting to note that for both the mixed retail and food sectors, 20-25,000 lines appeared to be an optimum size of assortment to offer. A future examination of developing store sizes for each sector might provide interesting data for comparison.

There is clearly a strong indication that during the same 10 year period, the food sector has been diversifying, while the mixed retailers have become more specialised in their assortment. In discussing the reasoning behind these decisions, both sectors are compared and contrasted within the following two sections on range diversification and specialisation.

Figure 3 Mixed Retailer Contraction in Product Lines, 1984 - 1994



Range Diversification

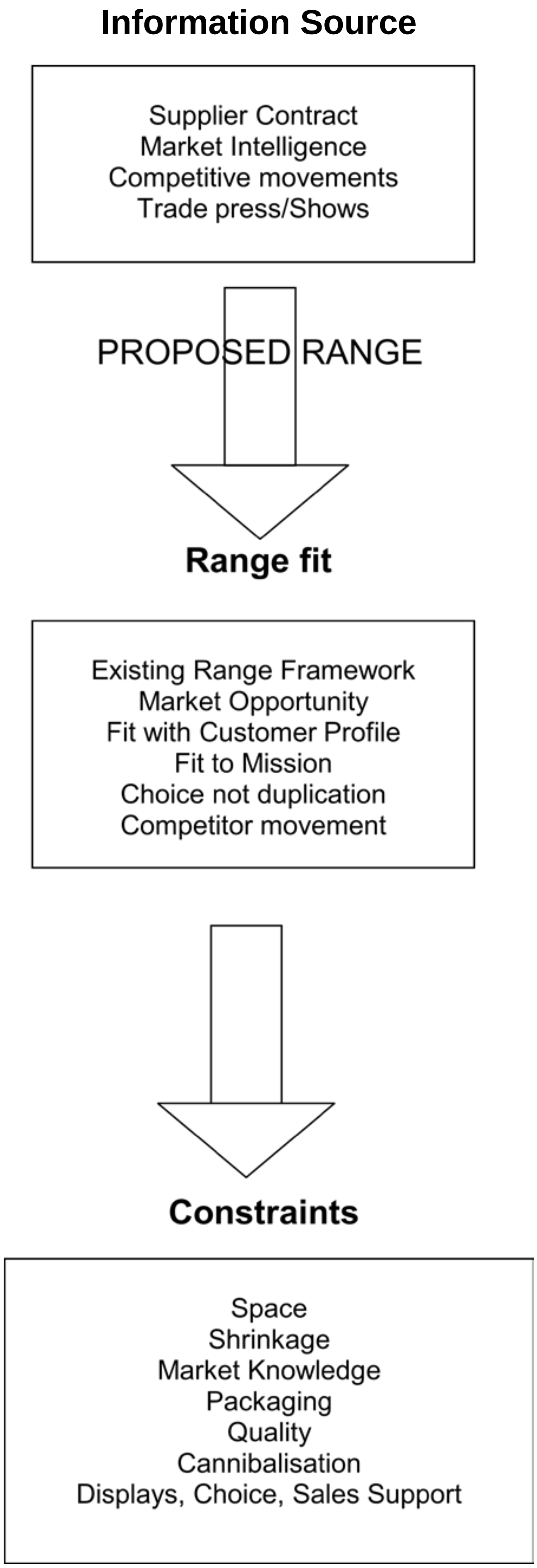
In examining the rationale behind range diversification decisions, the findings indicated strong similarities between the two retail sectors. Thus the most frequently cited responses have been combined into Figure 4 to illustrate the key criteria influencing the introduction of a new range. Each criterion will be discussed sequentially. The initial information source influencing which prospective markets to enter resulted primarily from supplier contact which then had to be *"translated from supplier propaganda into objective information*" (Food C).

The suppliers were relied upon to research and identify mutual market opportunities. Secondary data and market intelligence were also a key source of information for the retailers, being used predominantly as a tool to guide and support new range proposals. Given that the suppliers may also provide similar information to other retailers, competitive movements and successes in new market areas were keenly tracked, both for the retailers following "me too" reactive merchandise strategies (Pellegrini and Zanderighi 1990) but also for those defending market share. The fourth source for generating new ideas for diversification derived from trade press, or visiting trade shows and exhibitions. On individual occasions ideas were generated downwards by the board if there was a market niche identified.

The responsibility for creating a new range depended on whether it was considered a strategic change of direction requiring board approval, or simply a development of existing product areas. In the latter case it would be the responsibility of the buyer or category manager. In implementing the new range most of the retailers followed a team approach, involving the marketing, buying, merchandising, finance and logistics departments.

The majority of respondents agreed on the use of secondary market research data as a means of identifying new market opportunities. However, it was noticeable that the more senior the respondent the least importance was attached to market research information. In contrast, the buyers' attitudes to the extent of market research conducted prior to a diversification was revealing; most recognised a lack of it but due to commercial pressure often had to enter a new market area with limited information. *"There's not enough (market research) really, if you're going to spend a million on a new (range) launch you want to be absolutely certain it's not going to go wrong."* (Mixed A)

Figure 4 Retailer Reasoning behind Range Diversification



A proposal for a new range subsequently emerged from one or more of the sources of information. In evaluating the new range, a number of criteria had to be fulfilled. Generally, each respondent gave three criteria or reasons for entering a new market area (listed in Figure 4). Over half of the respondents used the adjective "fit" as an interpretation of the new range congruity with the merchandise mix, target segment and image. "Fit" with the existing ranges was interpreted in two ways, operationally and strategically. The operational consideration would be whether it would cohere with an existing merchandise area e.g. water filters with kitchen accessories, *"In the case of computer games there wasn't a fit with the other ranges, they are odd things to merchandise and there isn't a natural adjacency in which to fit the products"* (Food C). A strategic consideration would be if the retailer was already selling associated products and the new range was viewed as a natural extension to the existing portfolio.

The second criterion was if an available market opportunity offered sufficient potential to support the new range. All of the retailer buying departments closely monitored their market areas to identify potential for growth. However, identifying an opportunity would not necessarily result in a new range being introduced. Three of the retailers saw themselves as followers, not innovators and would rather miss the opportunity than risk a failed range. *"We would see if the opportunity already exists elsewhere in the market place. We see ourselves as fast followers not leaders."* (Food E). This risk avoidance strategy also linked in with the sixth criteria for introducing a new range; competition was already active in the proposed market area and some retailers felt they had a major gap compared with competitors.

As expected, the "fit" with the target customer profile was given more frequently than "fit" with the corporate mission. It was obviously of greater importance to the respondents that the target customer would want to buy these products otherwise the range would fail. *"Authority doesn't mean everything under the sun in that product group. It means everything that our <u>customers</u> want in that product group, sold in a way that is suitable to their shopping trip."* (Food C) However, lack of congruency with the corporate mission could still prevent a new range gaining final approval at board level: *"Some products don't fit with where we* *want to be and no matter how saleable the product was we might feel it could damage our long term objectives of trying to build up a name in a certain market."* (Food C).

Finally, three of the ten retailers stated that a new range would only be introduced if it was felt it could offer <u>real</u> choice and not duplication or cannibalisation of existing ranges. Here, the food retailers and mixed retailers were in agreement that the core ranges should remain untouched reinforcing the view that the potential for diversification lay in the non-core area: *"80% of range stays the same and there's only about 20% change in any one year".* (Mixed E) *"75% of the range selects itself. It's those range periphery or range extensions where you have to sit back and look at it."* (Food A) Furthermore, the food retailers saw most potential for diversification in this 25% non-core non-food area: *"non-core non-foods is an important area, a large proportion of the packaged food and drink grocery market is controlled by five retailers, whereas non-foods going through the same five constitutes less than half. We see it as half the market for us to still go for"* (Food B). The decision of which non-food ranges to stock was critical. While the primary reason for shopping in a supermarket is for food, Food D and Food E felt that certain non-food ranges could complement the core, creating a one-stop shop. However, there was a limit to the type of shopping products which could be successfully stocked in a supermarket; items were required to be self-selecting, easily transportable, high volume, regularly purchased lines.

Following evaluation of the range “fit”, all of the retailers were asked to consider the major constraints to the introduction of a new range. The most frequent responses are again listed in Figure 4. 40% of respondents felt that the opportunity cost of space was the main constraint (mixed C,D,E and Food A). Losing shelf space from another established merchandise range to a new, untried area was always a difficult decision, particularly for the mixed retailers. However, two stores (Food B and Mixed A), felt that space was not an issue as it would be managed operationally on a one-in-one-out basis; *"if there's a chunky market to be in space would not be a restriction. If we believe in it then that should run and something else should be trimmed back"* (Food B). Generally, it appeared that the food retailers were managing to control the space issue through targeting the ranges more effectively to the local demographics by branch profiling.

Shrinkage was given as the next constraint, particularly where high value items in a predominantly self-service environment were concerned. The decision of whether to carry computer games "live" (the complete product) or "dead" (empty packaging on display) posed operational issues for the food retailers who could not provide the necessary service support to this growing non-food area. Many mixed retail diversifications were also constrained by shrinkage due to their high street locations.

Surprisingly, having suggested that market intelligence aided the introduction of a new range, two mixed retailers then considered *"insufficient market knowledge"* to be a constraint. Specific questions such as 'What was the size of the market and was it big enough to take another player?' were, if left unanswered, likely to pose insurmountable problems post-entry. Their difficulty lay in anticipating the customer's desires when there were no historical sales or market data on which to base the decision. Perhaps the lack of clear coherence of some mixed retail assortments held one of the answers; if retailers were not sure of the positioning of their core offer, then how could they confidently select a new diversification. *"What to include and not - what is a core product? Is it deepening the existing inventory rather than adding to it? If it's deepening it, it might have a chance, if it's adding to it, it won't."* (Mixed D) By comparison, two food retailers (A and B) believed that packaging and merchandise quality of new diversified ranges were crucial factors to maintain the same positioning of non-core ranges as core ranges, whereas Food E felt that the risk of cannibalising existing sales was its <u>only</u> constraint.

To summarise, prior to introducing a new range, the constraints were often traded off against the range fit, with a slightly heavier weighting towards the latter. Ultimately, if there was sufficient scope, then the range would be trialled to verify its market potential.

Specialisation

Having identified the retailer rationale and constraints for entering a new market area, the respondents were questioned on recent deletions from the assortment and their reasoning behind these. As illustrated in Figure 3, the mixed retailer sample had deleted a large number of lines during the past 10 years. In general, there was a refocusing on the stronger ranges where it was felt they could achieve some "authority" in the market. This resulted in an assortment strategy of buying narrower and deeper within the ranges compared with ten years ago.

The reasoning for deletion of ranges was often dependent on the product or market area, and its positioning. (Figure 5 lists some of the key range deletions and the typical reasons for their deletion). The key reason some mixed retailers moved out of electrical appliances, cameras, watches and furniture was insufficient service support. The retailers could not offer the selling expertise, delivery and after sales service required for these shopping products. Their inability to compete with specialist retailers also became evident with the deletion of home furnishings, computer hardware, audio, and food due to the limited choice and depth of range available. Two mixed retailers had removed food ranges due to their lack of depth of assortment compared with the larger multiples, however, a lunchtime snacks and drinks range had been added (by two different retailers). Furthermore, despite having previously removed computer hardware from their assortments, some mixed retailers also saw computer games as the current growth area due to a market opportunity, and greater synergy with other entertainment ranges e.g. music, (CDs) or books.

Travel, flowers, drinks and confectionery were all removed due to a "lack of fit with the core business", echoing the same phrase previously given as a criterion for new range introduction by three of the mixed retailers. *"We were very much in the leisure industry, we sold travel books, maps and guides, and it was felt that the travel service was a natural extension, but it isn't, it's a specialist service".* (Mixed E)

Figure 5 Reasons for Deleting a Product Range

	Product Area	Reason
Mixed Retail	electrical appliances, cameras, watches, furniture	inability to offer service support
	home furnishing, electrical, audio, computer hardware, food	lack of consumer choice/depth
	travel, flowers, drinks, confectionery	lack of "fit" with core business
	jewellery	incorrect pricing and packaging
Food	ambient ready meals	consumer resistance to products
	mens and children's underwear	poor (merchandise) quality "fit"

Range fit also appeared to be closely linked in with the retailer's positioning. This was illustrated by the failure of a jewellery range which was blamed on incorrect positioning. *"We could have done more with it, could have got keener prices, better packaging and displayed it better"* (Mixed A). Moreover, two major retailers were returning to the same "failed" market area within two years of deleting the range. An elusive market niche justified their reasoning. *"We got our fingers burnt but we know there's still that big niche in the market we ought to be after if we can get the right formula".* (Mixed A)

It was clear that the mixed retail sector had more assortment positioning problems compared with the food sector. Two of the mixed retailers had expressed difficulty in identifying exactly what constituted their standard core ranges and therefore struggled in suggesting directions for non-core ranges. Unlike food retailers selling staple products, the mixed retailer core range was more susceptible to changes in fashion. The high street location of most of the mixed retailers had influenced the diversification into snack foods but limited space determined the deletion of general food ranges. However, having vacated a number of gaps in the assortment, seasonal one-off buys were considered the low risk alternative to create variety and motivate impulse purchasing. *"We would do a one off purchase, and that would be it. If we had anything really strong we might* *consider it, but I'm always nervous, it never works a second time around."* (Mixed E)

Perhaps the “confused positioning” (Kotler1988) experienced by some of the retailers resulted from a lack of coherence across the assortment. Historically, mixed retail assortments appeared to have evolved organically, rather than through strategic planning. "*Buyers were actively encouraged to think laterally and seize opportunities for diversification and be entrepreneurs. We now have a ban on thinking laterally because that leads you into disasters. We should not think width but think depth. This is what our buyers are told. We're not interested in new concepts but in deepening the concepts we're in."* (Mixed C) To a certain extent, specialisation in the core ranges could possibly be the safest strategy given the growth in competition from other players, such as the food retailers currently encroaching the same markets by diversification, *"We chose to concentrate on our core market, do what we know and do it well but if you take your eye off the ball, competitors will take you on. It is happening, supermarkets are selling magazines and books".* (Mixed E)

In the previous five years the emphasis had shifted from range extension to range engineering as the mixed retail stores realised there was a saturation point in ranges. One important factor for mixed retailers was Direct Product Profitability (DPP) which had been the main driving force behind some of the remodelling and refocusing of ranges, *"You can keep adding ranges but must come to a point of saturation in ranges as well".* (Mixed D) Poor sales performance and margins were obvious reasons given for deleting a number of products, and DPP had been instrumental in the decision making. However, the majority of the retailers felt that range performance could not be evaluated purely on financial return and it was important to view the total retail offer.

In contrast, the food retailers had deleted far fewer ranges as evidenced by the trends illustrated in Figure 2, but three (A, B and E) agreed that ambient ready meals were recent failures although all evidence had indicated a good growth area. The market for frozen, delicatessen and fresh convenience meals was expanding to fit in with an "on the move society" and its democratisation of tastes.

However, it appeared that the flavour and quality were perceived to be inferior to chilled and frozen versions. Although consumer resistance to long life meals showed no signs of lifting, it was unlikely these ranges would be removed completely. By definition this could be termed a range extension, but the retailers considered it to be diversification.

The high risk of diversification became apparent as new range introductions were equally prone to failure as established ranges. A recent non-food diversification of underwear had to be deleted due to the supply of poor quality merchandise. *"We thought we had the right supplier base and let them get on with it but they delivered a very mediocre and average product….it didn't measure up to our image"* (Food A).

While the rate of diversification and specialisation differed greatly between both sectors, the reasoning behind the moves held shared similarities. The degree of “fit” between the range and the retailer image and positioning was in essence a key reason for introducing or deleting a range from the assortment. It was also noticeable that the food retailers appeared to be pursuing more of a “skimming” diversification strategy compared with the more “scrambled” approach adopted by the mixed retailers.

Conclusions

A number of issues have emerged from this exploratory study. First, many retailer assortment diversification decisions appeared to be ad hoc and unplanned. According to the respondents, there was insufficient market research conducted prior to assortment diversification, with the buyers preferring to rely upon "management judgement" (Greenley and Shipley 1989). Often, the same criteria were used for entering or exiting a market area. This was reflected in some companies returning to the same market area within a short period with repositioned ranges, thus incurring high development costs. Second, these inconsistent assortment additions and deletions may also have a long term impact on the retailer's image and positioning with their target market. The findings suggested that retail assortments may require closer monitoring to avoid the necessity for radical repositioning (Corstjens and Doyle 1989).

Third, the study lends support to Hollander's comments on the Retail Accordion theory. The emphasis from specialisation to diversification can still be observed over 30 years on, but with less definition between the dominating forms. While it can be argued that the food retailers have taken on the generalist role, and the mixed retailers have reverted to more of a specialist role, the clear dominance of either form is less marked than in historical trends. Furthermore, the original Accordion Theory appeared grounded at the store level, with dominance from evolving store formats rather than assortment formats. This study has identified that the general-specific-general cycle (Gist 1968) currently appears to be more applicable to changing assortments rather than formats.

Recent developments suggest that the UK food retailers may be approaching an end to their diversification dominance, but with no sign yet of an emerging alternating form. In terms of assortment strategy, the food retailers adopted a higher risk form of diversification pursuing “new merchandise with unrelated service requirements” (Omura 1986), compared with the mixed retailers who, more wary of diversification adopted a low risk strategy, actively specialising into their core business. However, it is interesting to note that these strategies are not always in response to consumer requirements. One wonders if the consumers, tired of the diversified, scrambled and shallow non-food assortments, will force the supermarkets to revert back to their core business, echoing the mixed retailer strategy. There is evidence to suggest that environmental forces are already influencing this with recent developments in city centre convenience stores and home shopping formats emerging.

Fourth, the study also highlighted some difficulty in proving or disproving the Retail Accordion theory. The “number of lines” is clearly an inadequate measure of assortment movement. Ideally, an additional dimension is required to measure and track the “coherence” of the assortment, or the degree of scrambling. This may then be evaluated with the retailer positioning. Perhaps a clearer categorisation of ranges within the width of the assortment holds the answer. A measure of the extent to which product ranges are related or unrelated to the core offer, might provide more realistic returns.

Finally, a number of implications can be drawn from the Accordion Theory. In modifying Hollander's notes, additional forces of competition, space and market positioning can be seen to influence the contraction of an assortment. Indeed, tougher competition in more saturated markets may have resulted in other sectors raiding alternative assortments e.g. DIY. Some lessons become evident such as the importance of clear positioning for diversification, but equally, the study also suggests that all assortments risk being raided and only those with a strong customer proposition will survive the threat. The study has also identified a number of new research questions such as, 'how far should assortments diversify?' and 'at what point could assortments become saturated?' Does this then signify the transition into specialisation, or are there other phases of the Accordion?

Although the evidence for the Accordion Theory remains to a large extent anecdotal, on reflection the accordion, or rather the orchestra analogy (Hollander 1966) may require further refinement. An additional dimension of the score, or music being played could be interpreted as the assortment movement. As more musicians with groups of instruments, (representing the stores and formats) enter the orchestra, there will be point of saturation when there are too many playing certain parts of the score, resulting in an imbalance and a confused audience. Some musicians may then decide to play parts designed for other instruments. The success of this switching will depend on the orchestrator's (retailer's) ability to convince the audience that their deployment of instruments is compatible with the score.

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Consumer Perceptions of Non-Food Assortments: An Empirical Study

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Abstract

Previously, retail image research has been conducted predominantly at the store level. This paper examines consumer perceptions at the product group level to determine if assortments enhance or detract from the retailer image. It presents the results of an empirical study of 504 grocery shoppers and their attitudes towards six non-food categories. It finds that consumer perceptions are both category- and store-specific, and suggests that future assortment image research should be measured on three levels, notably core, non-core and peripheral product groups.

Paper 2. Consumer Perceptions of Non-Food Assortments: An Empirical Study

Introduction

The key to long-term sustainable, competitive advantage for any organisation is a comprehensive strategy requiring a clear positioning for maximising customer satisfaction. One strategy currently pre-occupying a number of major UK food retailers is diversification into further non-food ranges to enhance and strengthen their market positioning and profit potential. A dilemma, however, is emerging. How far can diversification proceed without weakening the store image among customers or even alienating existing customers? This study contributes to the debate by examining consumer perceptions towards expansion of non-food ranges within supermarkets. A contention of this paper is that the traditional emphasis on store image may be oversimplified. Important variations in image across merchandise assortments at the product category level are discovered. The findings distinguish between key or core merchandise assortments from those considered non-core, with implications for the management of diversification strategies.

During the 1980's and early 1990's, the "Big Three" UK food retailers, Sainsbury, Tesco and Argyll, followed accelerated store expansion programmes, each opening, on average 20 stores per year. This increased space enabled organic expansion of the product assortments. Non-food ranges, in particular, were targeted with diversifications into areas such as stationery, clothing, audio and video. The aim of the superstores was to attract a wider market with the dual objectives in offering both the convenience of one-stop shopping and value for money (Duke, 1991). Although this diversification offered the attraction of higher margins for the retailer, care was needed to ensure it would not be detrimental to the retailer's image. Did these ranges enhance the image of the store in the consumers mind, leading towards the ultimate one-stop shop? Or alternatively, to use branding terms offered by Kotler (1988), did they detract from the image because of “overpositioning” (in which consumers hold a narrow view of what constitutes a stores’s range of merchandise) or “confused positioning”, resulting from the new ranges adversely positioning the store? Retailers need to determine if these additional ranges to their traditional categories offer genuine opportunities for added differentiation. Within recent academic and trade literature, most attention has been directed toward store expansion and the growing threat of supermarket saturation, but the threat of merchandise saturation and its impact on store image has been rather neglected. It is suggested that assortments, similar to stores, can reach an optimum level beyond which further expansion would be considered inappropriate by their main patrons. In this paper, differences in consumer perceptions towards product categories between stores is examined, providing valuable data on store image and opportunities for differentiation. In the next three sections the background to the study and methodology are outlined, followed by a detailed examination of the survey results. The implications for retail assortment strategy are offered, together with suggestions for further research.

Background

Retailers need to get the right combination of products or assortment in their stores for a variety of reasons. Firstly, assortment is a key determinant for store choice and retaining customer loyalty (Greenley and Shipley, 1992). Various authors have acknowledged that merchandise assortments form a major component of a store's image. For example, Lindquist (1974) concluded that "merchandise assortment" was mentioned most frequently for positive consideration when isolating the components of a retail store's image. Out of the various store image components, merchandise dimensions (in terms of suitability, variety or assortment choice) are rated either second (Fisk, 1961, Louviere and Johnson, 1990, East et al., 1992) or third (Berry, 1969) in importance to locational convenience, price or quality. Whereas the primary determinant for store choice varies for different studies, merchandise assortment remains constantly important.

Secondly, the implications of having a particular merchandise assortment can either work negatively, alienating consumers, as with a limited or adverse range; or positively, encouraging consumer loyalty (Berry, 1969). Internal consistency across an assortment is essential to project a uniform, synergistic image and one alien range may reduce a retailer's chance of developing this effect (Samli, 1989).

Furthermore, an assortment can provide a distinctive edge in the weaponry of competitive advantage (Knee and Walters, 1985). Porter (1985) asserted that one of two generic strategies - differentiation or cost leadership - is the best way of achieving competitive advantage. Of the two strategies, differentiation has been suggested as being the more sustainable for retailers (Warnaby and Woodruffe 1993). According to Cadeaux (1992), assortments play a key role in a differentiation strategy, in which retailers can pursue advantages with their selections in order to attract one or more segments and build patronage loyalty. This is further supported by Samli (1989) who considered a highly desirable merchandise mix as vital for the survival of the retail store. He recommended that the mix must be different to competitors' mixes and congruent to the retail image, to establish differential advantage.

Despite the acknowledged importance of location, price and quality as determinants of store choice listed earlier, they are likely to become less influential in distinguishing between store images in the future. As the grocery market saturates and the concentration of stores increases, maintaining store differentiation through locational convenience is likely to become more difficult. With the market for the core ranges maturing, there is a greater tendency for price imitation, which is relatively easy to match at short notice. According to McGoldrick (1990), perceptions of store differentials will tend to erode over time with imitation - real or superficial. Compared to speciality retailers, the food retailers have less experience in developing and managing non-food categories, and may have more difficulty in imitating a successful expansion strategy adopted by a competitor. This could enable innovative retailers to exploit merchandising variety and assortment as the most salient determinant of store choice and to possibly sustain a differential advantage.

Assortment decisions require both a balance in depth and width across a range of products and congruity with the target market positioning (Walters and White, 1987). This balance should be sufficient to allow for growth, but not too wide to tie up valuable space in unwanted stocks. McGoldrick (1990) suggests there are no simple guidelines in making strategic decisions regarding the width or depth of product assortment, resorting to what Greenley and Shipley (1989) refer to as "management judgement" replacing market research. Findings by Hart (1994) confirm a lack of research in to assortment congruity with the target positioning. Retailers ranked the fit or congruency of a new range with the existing assortment as the most important criterion for selection, but omitted to conduct any image research at this level.

The importance of range congruency or compatibility with the retailer image is further argued by Davies and Brooks (1989) who proposed a model of interaction between department, store and chain images in establishing an overall image for the retailer**.** In the event of a poor relationship between department and store image, customers would leave without purchasing, due to their expectations being unfulfilled. While offering a new perspective to the image debate, the study lacked the empirical evidence to support these observations. Research into retail image has focused on either store image determinants or measurement (e.g., Zimmer and Golden, 1988), or product / brand image (e.g., Jacoby and Mazursky, 1984). What appears to be lacking between store and product image is the empirical evidence into the assortment and its impact on the consumer. Indeed, Berry (1969) recommended that analysis of specific image determinants, such as assortment, was warranted.

According to Samli (1989) image is a complex combination of a number of components which is different and greater from the sum of its individual components. Reinforcing this, Jolson and Spath (1973) suggested that consumer attitudes toward each component do not combine as expected to produce an overall attitude toward the retailer. Additionally, each determinant of patronage varies by the product group, so each category has to be handled separately. A study by Cardozo (1974) of two product classes (housewares and health and beauty aids) concluded that store image varies by product class, and each of these may have individual images. Cardozo's research, like previous image studies (Berry, 1969) focused on the department store. The supermarkets, by contrast, have been the subject of image studies at the store level alone (Doyle and Fenwick 1974; Davies and Brooks, 1989), with little empirical work existing at the product group level. This is surprising considering the recent retailer diversification strategies which suggest that the supermarkets are now faced with competition not only from other supermarket chains but also from speciality retailers. Although these competitive forces were previously observed by Hollander (1966), market saturation in the food retail environment is a recent development posing new threats. The previous image literature has identified that categories need to be treated separately, and the current situation implies that supermarkets are probably most at risk.

Objectives

This research study focuses on consumer perceptions of merchandise assortment by product category. Specifically, it seeks to determine consumer perceptions of the compatibility or "fit" of the range with the retailer image. Earlier research has identified that the retailers believed the degree of range fit with other existing ranges to be the major criterion in the introduction of a new range (Hart 1994). This study also seeks to identify the extent to which range diversifications (such as clothing and entertainment) are offering a suitable choice consistent with the other established ranges. Thus, consumer perceptions toward choice in the non-food ranges are examined. With few clear guidelines for retailer assortment planning, these results may help build a picture of assortment depth and consistency from the consumer’s view. Furthermore, a particular aim is to identify expansion potential for existing non-food categories as a suggestion for future range directions for the retailers. Finally, an underlying objective is to discover if the consumer perceptions towards non-food ranges vary by store, according to the image of the specific retailer.

Methodology

Merchandise assortment has many definitions, but there are limitations to their usage with consumers; they can only be questioned on available ranges in familiar stores and cannot accurately judge a prospective range without experience. Consequently, only existing non-food categories were used for the subject of this study. Three key variables describing characteristics of the range were selected for analysis. These were: degree of fit, extent of choice available and importance for expansion. The degree of range "fit" has been identified in Hart's earlier work (1994). Secondly, consumer perceptions of "choice" or depth available within each category was considered pertinent in identifying both merchandise saturation and scope for expansion. Finally, consumer perceptions of each category's potential for expansion were used to identify which categories were preferred, and as an indicator of its relative importance.

The semantic differential scale (Mindak, 1961) is a popular measurement technique, and was felt to be an appropriate means of measuring the intensity of perceptions toward the various components of range expansion and store image. This was supplemented by open-ended questions (McDougall and Fry 1974), allowing further qualitative explanation. These two measures were combined with additional ranking to form a structured questionnaire.

Six categories or product classes were used to investigate differences in perceptions from one product class to another. Cardozo (1974) investigated the differences in store image from health and beauty aids to housewares. These two categories are currently stocked within supermarkets, and after consultation with retail management, it was felt necessary to include all non-food product classes or categories likely to be stocked in these superstores to compensate for the low presence of certain categories in some chains. This resulted in three established categories of household (including detergents and cleaning products), health and beauty aids - HBA (cosmetics, toiletries and pharmacy), and home products (kitchen accessories, tableware and small electrical appliances). The remaining three were more recent diversifications of clothing (mens, ladies or children’s outerwear, underwear, socks and tights) stationery (books, greetings cards and newspapers) and entertainment (audio, video and toys).

A quota sample of 504 supermarket shoppers was selected, drawn from the six largest food retailers in the East Midlands area, UK. The sample for each store was stratified according to how each retailer was represented as part of the region’s market. It comprised of 28% Sainsbury, 19% Tesco, 14% Safeway, 16% Asda, 13% Co-op, and 10% Morrisons’ consumers which represented the region's grocery market shares. Professionals trained by the Market Research Society interviewed consumers in two major city centres in the East Midlands area during January and February 1994. The response rate varied by each question according to whether all six ranges were stocked. Discount stores were excluded due to the low presence of non-food ranges, and by the same respect, smaller town centre and edge of town stores were also excluded.

Store Loyal Consumers

The study sample was chosen from consumers who were store loyal to supermarkets of approximately 25,000 square feet and over, which, by definition qualify as superstores (Duke, 1991). Store loyal subjects were chosen because, in the current competitive climate it is considered more appropriate to sustain margins by nurturing relationships with existing customers than to build volume growth (Denison and Knox, 1992). Secondly, a pilot test involving interviews with loyal and non-loyal consumers showed that regular or loyal consumers to each store held more accurate image perceptions than non-loyal consumers. It appeared that non-loyal consumers had difficulty in recalling what ranges existed in specific stores. As Berry (1969) confirmed, an image is acquired and learned through direct experience with the store.

Using terminology from brand loyalty, store loyalty may be defined as repeat patronage at a particular store for any products or brands (Osman, 1993). To measure repeat patronage, it was necessary to decide the extent of frequency of prior store patronage. In this study, loyal consumers are classified as those who have purchased from the same store at least four times in the last six shopping trips. Thus this classification determines whether a relatively regular pattern of behaviour exists. Merely asking consumers for their store patronage behaviour over a specified time period (say, 1 month) was considered inappropriate because the frequency of supermarket shopping varies with the task situation (e.g., the ownership of freezers reduces the necessity of weekly visits). The pilot test suggested that consumers had no difficulty in naming the store to which they were most loyal. Although several consumers tended to use one or two stores most frequently, one was preferred, based on this classification.

Importance of Congruity and Range Fit

One dimension of image congruity (and incongruity) has been defined as the match (or mismatch) between the store attributes and a consumer's perceived important attributes (Anderson, 1973). Spiggle and Sewall (1987) have suggested that when there is incongruity, there is likely to be store switching. This study uses a different definition of congruity or fit, in the context of extension of product categories. Since merchandise assortment is one of the key components of store image (Lindquist, 1974), congruity is defined as the match between category extension and the existing store image. It is suggested that incongruity between new categories and store image, like incongruency between other components (Spiggle and Sewall, 1987) could lead to failure of the category. As a measure of category fit, the respondents were asked to indicate on a five-point scale the compatibility of each category with the store. This was expressed as the appropriateness for the store to sell each of the six categories, labelled as “range fit”. The anchors were 1= inappropriate (these ranges shouldn't be stocked) and 5 = totally appropriate.

Perceptions of range fit, degree of range choice and importance of expansion for each non- food category were cross-tabulated (Tables 2-4). For each category, analysis was conducted by X^2–tests for measuring any significant differences between stores. The Pearson coefficient was used to test for any association between perceptions of range fit and choice for each category, with perceived importance of expansion (Table 5). Where the results for categories showed a significant dependence on stores, frequency distributions by stores are tabulated (Table 6). In the case of importance for expansion, clothing was rated most important (from Table 4) and is examined further by store. Finally, any relationship between frequency of purchase and perceived importance of expansion is examined (Table 7).

Results and Discussion

Perceptions of Range Fit

Whereas over 75% of consumers considered the household and HBA ranges to be totally appropriate, only just over 50% felt that clothing and entertainment were totally appropriate. In other words, more consumers considered household and HBA to hold a good fit with that store's image (Table 2). Interestingly, over 15% of consumers felt the clothing and entertainment ranges to be totally inappropriate within their regular stores. The X^2–test was applied to the crosstabs by store and perception of range fit for each non-food category. To avoid small expected values, the responses "totally inappropriate" and "tend toward inappropriate" were combined, as were "totally appropriate" and "tend toward appropriate", giving tables with 10 degrees of freedom. The X^2-tests indicated that there were no significant differences in perceptions of range fit across stores except for clothes (X^2 = 32.84, $P < 0.001$) and entertainment (X^2 = 28.6, $P < 0.005$). Therefore perceptions of range fit may be dependent on the choice of store for clothes and entertainment, but not for the other categories. The differences between specific stores are examined in a later section.

Table 2 Perceptions of range "fit" in each non-food category

	Clothing (n=481)	*House (n=504)*	*Home (n=488)*	*HBA (n=504)*	*Stationery (n=495)*	*Enter't (n=476)*
Totally inappropriate	15.4	0.2	4.9	0.8	5.3	15.8
Tend towards inappropriate	9.6	0.8	4.1	1.8	3.4	8.2
Feelings neither way	15.0	6.7	15.0	10.3	15.2	14.7
Tend towards appropriate	7.9	6.7	13.1	11.9	16.4	9.5
Totally appropriate	52.2	85.5	62.9	75.2	59.7	51.9

All values are given as percentages.

The more frequently purchased categories of household and HBA appeared to be what the consumers expected to find in a supermarket core range. The slightly lower ratings of 75% fit for HBA may suggest that this category is not perceived as a total core range by everyone, possibly due to pharmacies retaining an image of specialism in this category, compared to household products being predominantly stocked by supermarkets. The depth within the range may also influence how it is perceived by consumers, e.g. more “health” items such as cold remedies may be considered more core than cosmetics. Home and stationery ranges were considered to have a level of around 60% fit, which meant that consumers were more equally divided as to whether these constitute core or non-core ranges. As discussed earlier, clothing and entertainment achieved an even lower status. These four categories may be interpreted to have a lower degree of fit for two reasons: (1) consumers consider the category to be incongruous with the core ranges of food and household; and (2) the range is incorrectly positioned, and thus the retailer is perceived to have a different image for core products compared to non-core products. According to earlier research by Hart (1994), these categories of clothing and entertainment were selected for their fit with existing ranges or fit with the customer profile. These results indicate that approximately only 50% of consumers appear to agree with this.

Dimensions of Choice

The perceptions of choice available within each category were measured on a five-point semantic differential scale, in which 1= far too much choice and 5 = far too little choice. At an aggregate level across all stores, very few consumers (≤ 4%) considered the stores to have too much choice within any of the categories. Indeed, more than 60% of consumers felt the ranges were "about right" across all categories, particularly in household products, in which 91% of consumers considered the range to be adequate (See Table 3). Both HBA and stationery (83.6% and 81.9% respectively) were also considered to have sufficient choice. In contrast, the clothing ranges were considered to have less than enough choice by over 35% of consumers. Home and entertainment categories were also perceived to offer insufficient choice by 25% and 21% of consumers, respectively.

Table 3 Perceptions of degree of choice for each non-food area

Degree of choice	*Clothing (n=425)*	*House (n=501)*	*Home (n=458)*	*HBA (n=495)*	*Stationery (n=470)*	*Enter't (n=424)*
Too much	0.7		0.2	0.4	0.4	0.8
More than enough	2.8	3.0	2.0	1.8	1.7	1.7
About adequate	61.2	91.0	72.7	83.6	81.9	76.6
Less than enough	12.2	2.0	12.7	8.7	9.1	9.9
Too little	23.0	4.0	12.4	5.5	6.8	11.0

All values are given as percentages.

These results reflect the perceived depth of assortment, with household and HBA scoring highly as the more established core non-food ranges. Considering its more recent addition to supermarkets, stationery achieved a high rating for adequacy of choice. Any further specialization in this category could prove unproductive resulting in saturation within the range. The perceived lack of choice in the clothing, home and entertainment ranges may have resulted from consumers comparing the supermarket ranges with the depth of range carried by the specialists. Clearly, the key difficulties in carrying limited stocks of these ranges lies in identifying the optimum product mix to suit the profile of consumers on an average shopping trip.

Scope for Expansion

Having considered the fit and choice within each of the non-food categories, consumers were then questioned on their attitudes toward expansion in these ranges. Results were expressed in terms of each category's relative importance for expansion. The six categories were ranked according to preference, in which the anchors were 1 = most important and 6 = least important. The frequencies reported in Table 4 indicate that at the aggregate level, across all stores, there is a marked difference in levels of importance between clothes, household, home and HBA on the one hand, compared to stationery and entertainment on the other. Nearly 50% of the sample felt that the clothing, household and home ranges were most/very important for expansion, compared to 53% of consumers feeling stationery was least/less important and nearly 70% ranking entertainment as least/less important for expansion. The differences attributable to the "most important” label were tested using the X^2-test for independence. The level of importance attributable to the ranges is significant with $X^2 = 168.6$, $P < 0.001$, indicating that clothing, household, home and HBA could be priority areas for expansion, whereas stationery and entertainment are a low priority for expansion.

Table 4 Importance for expansion in non-food categories

	Clothing (n=397)	*House (n=410)*	*Home (n=404)*	*HBA (n=402)*	*Stationery (n=396)*	*Enter’t (n=389)*
Most important*	34.5	28.7	17.8	9.7	6.3	6.7
Very important	12.3	18.8	29.2	26.6	6.1	7.2
About right†	23.4	32.9	40.6	49.0	34.4	18.3
Less important	14.9	9.8	8.5	9.2	33.8	22.6
Least important	14.9	9.8	4.0	5.5	19.4	45.2

* Difference between ranges is significant, P 0.001, $X^2 = 168.6$
†Label is a combined score taken from two responses
All values are given as percentages.

The consumers were then asked to indicate their reason for their expansion preference in an open-ended question. The four most frequent responses for the highest ranked categories are listed in Figure 6. The convenience and one-stop shop factor featured strongly, with 21% of consumers feeling it was a strong motivator for expansion in four categories - consumers would prefer to purchase clothing, household, home or HBA items during their normal food shop rather than visit a separate specialist retailer. Location was a key factor in this, with many of the superstores being located on edge of town or out of town sites, offering limited local specialist choice in these categories. This situation offers the retailers an opportunity for non-food range profiling at the store level according to the depth of assortment mix locally available. This is particularly relevant in the clothing category where more choice or depth could motivate greater purchasing.

Figure 6 Reasons for expansion preferences

	%	
Clothing	22	Its more convenient to buy clothes while food shopping.
(*n* = 136)	20	More choice in clothing would make me buy more.
	12	I'd like more variety in childrenswear/babywear.
	9	There's not enough clothes choice locally.
Household	38	Every home needs these items every week.
(*n* = 105)	24	There's not enough choice in household goods.
	13	I don't want to shop elsewhere when I use these items every week.
	11	Supermarkets are for household goods, food and convenience items.
Home	28	I want to buy home items while food shopping.
(*n* = 72)	15	I want a better selection all year round.
	13	I like to buy new products for the home.
	10	Home products would be better value in supermarkets.
Health/Beauty	42	There's not enough choice available.
Aids	22	It saves going to the chemist.
(*n* = 36)	11	I buy these items every week.
	11	I'd like more (manufacturer) brands as well as own brand.

This qualitative data also reinforced which of the categories the consumers perceived to be core ranges for supermarkets. Household products were felt to be an essential range, in part attributable to their high usage, and were subsequently considered high potential for expansion. Health and beauty aids was also considered a core range, but with less expansion potential - nearly 50% of consumers felt that the currently stocked ranges were "about right". Lack of variety/choice in the specific category appears to be an important factor for expansion. This was most evident in the clothes and home sector where many consumers felt that more choice in supermarkets would motivate them to buy more of these products. Specifically for clothes, some consumers felt that childrenswear/babywear should be expanded within their regular supermarkets.

According to Table 4, consumers rated home products highly in terms of importance for expansion. But further analyses of qualitative responses indicated that some consumers preferred these ranges for browsing and had a low inclination to buy on a frequent basis. This would suggest that many of these items may not be purchased on an average food shopping trip. Many home items may be more suitable for the hypermarket or larger superstore of over 50,000 square feet where additional shelf space is available to offer an appropriate choice. As a corollary, not everyone will shop in the same way, possibly creating opportunities for specific home products to be sold by smaller stores. This illustrates the need to investigate each range separately. A further element to emerge in the qualitative results was the supermarket image for value. Many consumers felt that specific ranges should be expanded because they would offer better value in a supermarket than a speciality store.

The responses in Figure 6 implied that more choice may encourage more purchasing, and this prompted analysis into whether correlations existed between the consumers' perceived importance for expansion and their perceptions of choice in that range. The results are given in columns 2 and 3 of Table 5, and show clothing and entertainment categories to be significant at the 1% level. Secondly, a correlation between range fit and importance for expansion was tested. The results are given in columns 4 and 5 of Table 5, and again, clothing and entertainment show significant correlations at the 1% level. These findings show that for clothes and entertainment only, what is considered important for expansion is significantly influenced by the current range in the patronised store.

Table 5 Relationships between perceptions of choice and fit with perceived importance of expansion per category

	Choice		***Fit***	
Category	*Pearson Coefficient*	*Significance*	*Pearson Coefficient*	*Significance*
Clothing	0.37	0.01	0.48	0.01
Household	-0.01	NS	-0.10	NS
Home	0.10	NS	0.07	NS
HBA	0.08	NS	-0.01	NS
Stationery	0.08	NS	-0.01	NS
Entertainment	0.35	0.01	0.29	0.01

NS = not significant

Store Specific Perceptions

Since the clothing and entertainment categories were found to be highly significant for range fit, further analysis was conducted into range fit for these categories for specific stores. Table 6 gives the results for each of the six retailers. An immediate observation is that some consumers are most enthusiastic about the range fit, with 80% suggesting clothing ranges are most appropriate in Asda stores.

Table 6 Store specific perceptions: (a) range fit, clothing and entertainment; (b) perceptions of "too little" choice for clothing, home and entertainment; (c) importance for expansion in clothing

	Morrisons		*Tesco*		*Asda*		*Sainsbury*		*Co-op*		*Safeway*	
	*I**	*A**	*I*	*A*	*I*	*A*	*I*	*A*	*I*	*A*	*I*	*A*
(a) Clothing (n = 479)	39	55	21	63	8	80	32	52	21	64	31	45
Entert't (n = 473)	24	59	14	64	15	72	39	52	24	63	22	60
(b) Clothing (n = 424)	40		32		28		34		39		45	
Home (n = 456)	19		23		20		25		17		49	
Entert't (n = 421)	22		21		8		27		25		24	
(c) Most/much important *(n = 395)*	59		44		61		36		52		37	
About right *(n = 395)*	27		22		18		27		17		27	
Less/least important	14		33		21		36		31		36	

*Inappropriate (I) and (A) appropriate scores per store given only. A third neutral label is excluded from this table. All values are given as percentages.

This could be attributable to the more extensive and established clothing range stocked in the Asda stores, resulting in a greater awareness. However, Tesco also carried a greater depth in their clothing range with 63% of shoppers perceiving it most appropriate to the Tesco image. Morrisons, Sainsbury and Safeway, who at the time of the study carried the most limited clothing ranges scored 55%, 52% and 45% respectively on the appropriateness scale. These results suggest that range fit may be related to its allocated space in proportion to the other ranges stocked.

In examining the perceptions of the entertainment ranges, Asda consumers again appeared most enthusiastic with 72% of consumers considering it most appropriate, followed by Tesco (64%) and the Co-op (63%). Nearly 40% of Sainsbury consumers felt entertainment was not appropriate within their regular store compared to only 15% of Asda and Tesco consumers. These results indicated that although a new category may have high market growth potential, it could also be perceived as inappropriate for specific retailers. Clearly, clothes and entertainment categories require some selectivity and sensitivity across stores, with clothing considered inappropriate by nearly 40% of Morrisons' consumers and entertainment by 40% Sainsbury consumers.

The results suggested that the clothing, home and entertainment categories were considered to have insufficient choice. Further analysis was undertaken to determine how this perception of choice might vary by store as well as category. The feelings of "too little choice" are given in Table 6(b). The X^2-test was applied to the crosstabs by store and perceptions of choice for each non-food category. To avoid small expected values, perceptions of choice was grouped into three labels : "too little", "about right" and "too much", giving tables with 10 degrees of freedom. There were no significant differences at the 5% level except in the case of the home category ($X^2 = 31.9$, $P < 0.005$). An immediate observation is that for all stores a large proportion of consumers considered the clothing ranges to be too limited in choice and this would clearly present an opportunity for expansion. Safeway consumers, on average, felt more strongly about the limited choice in the home category with 50% of consumers feeling the home range is given too little attention. Contrastingly, the other five retailers were considered to have sufficient depth. This suggests that further investigation into the depth of specific retailers' home ranges might be revealing. While 20% of consumers in most stores felt there was too little choice in entertainment, only about 10% believed this to be the case at Asda, with 87% feeling that the current Asda entertainments range was "about right". Taken together, this indicates that perceptions towards category expansion are store specific, in some cases contributing to merchandise saturation.

The X^2-test was applied to the crosstabulated results by store and importance attributable to each non-food category. To avoid small expected values, importance was grouped into three labels: "most/much important", "about right" and "less/least important", giving tables with 10 degrees of freedom. There were no significant differences at the 5% level except in the case of the clothing category ($X^2 = 19.3$, $P < 0.05$). Evidently, the clothing category emerges as the strongest priority for expansion, but within which stores? The consumer perceptions of the importance of expansion in clothing for their regular supermarket is given by store type in Table 6 (c). Range perceptions divided into two store groups with Morrisons, Asda and Co-op consumers appearing most positive towards clothing expansion whereas Tesco, Sainsbury and Safeway consumers were somewhat more conservative in their views, with a similar percentage believing that clothing should hold less or least importance for expansion. Interestingly, Sainsbury and Safeway consumers both exhibited an identical profile with respect to their attitudes towards expansion in the clothing ranges. This finding prompted the question whether Sainsbury and Safeway's limited clothing ranges restricted purchasing, thus influencing the degree of importance for expansion. Thus the relationship between purchase frequency and perceived importance for expansion across the categories was tested using Pearson's correlation analysis. The results are presented in Table 7 and show that clothing and entertainment are significantly correlated at the 1% level with coefficients of 0.30 and 0.28, respectively.

Table 7 Relationship between frequency of purchase and perceived importance of expansion per category

	Pearson Correlation Coefficient	*Significance*
Clothing	0.30	†
Household	0.05	NS
Home	0.12	*
Health and Beauty	0.06	NS
Stationery	0.07	NS
Entertainment	0.28	†

*Significant at 5% level
†Significant at 1% level
NS=not significant

In examining the store profiles for non-food categories, the Sainsbury consumer emerged as more of a supermarket purist, preferring to concentrate on core food and core non-food ranges. This may be due to their perceived image of the non-core, non-food ranges of home, stationery, clothing and entertainment as having a lower concentration of own brand products, thus diluting the total Sainsbury image. In comparison, although Safeway consumers exhibited a similar profile to Sainsbury consumers in entertainment choice and clothing expansion, they were unique in their attitudes toward home products. The Safeway consumer appeared marginally more amenable to non-food expansion than the Sainsbury consumer. Further examination of perceptions of non-food fit with the store image revealed four distinct groups: Sainsbury and Safeway achieved the lowest aggregate compatibility rating for non-food fit with store image, followed by Morrison which fell almost halfway between the Sainsbury/Safeway and the Tesco/Co-op group. This latter group had an identical aggregate range fit, but were still well behind Asda which appeared to have the highest overall rating of non-food fit with store image.

It appeared that the majority of food consumers were favourable to the expansion of non-food categories but out of the 349 qualitative responses to the open ended question why should their chosen non-food category be expanded, 25 were neutral, preferring the ranges to remain the same, or were not interested. Twelve responses were negative which were revealing in their feelings; six responses preferred food only supermarkets, wanting clothing, entertainment and stationery to be excluded to make way for more food, and at the extreme, "I avoid Asda because it's got too many non-food items". Overall, these results have shown that consumer perceptions are not only store specific but also category by store specific implying that retailers must be aware, as concluded by Jacoby and Mazursky (1984), that incongruous product groups may affect their image negatively. Interpretion of the results need to be treated with some caution. The findings of category expansion are based on perceptions to hypothetical questions, and may require further studies to assess their reliability. Additionally, the relationship between perceptions and actual behaviour towards range expansion may not always appear concordant. This is due, in part, to the complexity of consumer characteristics, in which mood changes and situational variables may influence the responses at the time of questioning (Gardner, 1985, Foxall, 1983).

Implications and Conclusions

A major problem facing the larger format superstores is how far to extend beyond core ranges. With more non-food diversifications, the assortment could become fragmented, eroding a sharply defined store image. This may result in consumers having a confused perception of what a store stands for, perhaps conflicting with their expectations (arising from overpositioning). The results demonstrate that retail image is a more complex paradigm rather than simply a unified concept at the store level. By focusing on merchandise assortment this study has shown how consumer perceptions can vary at the product category level between stores, displaying a secondary level of image. It appears that consumers subconsciously divide the supermarket assortment into three groups: core, non-core and peripheral merchandise. It is suggested that consumers might associate their perceptions of each store with a unique set of categories representing core, non-core and peripheral ranges. Core merchandise are those product ranges they expect to find in a supermarket, including food and some non-food ranges. Non-core merchandise are those ranges which are considered less essential to the average supermarket visit (i.e. home and stationery), but are still perceived to be enhancing the image. Peripheral merchandise are the ranges which are considered least congruous with the store and with other ranges (i.e. clothes and entertainment), and could potentially detract from the image. They may also be the most diversified product groups. Identification of this grouping may enable management to better understand how to influence consumer acceptability of their ranges within stores and provide guidance in their assortment expansion.

It is suggested that variations in range incongruity between product groups may result from differences in perceived purchase risk. It is likely that for higher outlay items, such as some items of clothing and entertainment products, there may be more to lose in making a poor decision, with higher associated perceived risk. This may explain why fewer shoppers feel clothing and entertainment are totally appropriate with the existing store image relative to other categories, particularly if the current ranges of these two categories are considered restricted. It might also help to explain why perceived importance of expansion of these two categories is significantly correlated with frequency of purchase. In general, consumers who have little experience of buying particular categories within their usual store may share more anxieties in their expansion. Conversely, the consumer is able to feel safer with an existing and familiar category. In this context, categorization of items as either non-core or peripheral merchandise may be influenced as much by the experience of the store profile as by the characteristics of the merchandise.

One implication of this is the strategic need for retailers to adapt to changing consumer preferences, (Corstjens and Doyle, 1983). In practical terms, a decision not to stock a new range based on initial hostile consumer perceptions may be premature. Retailers may need to use a combination of cues to evaluate the feasibility of a new range such as targeted promotional activity to encourage trial purchase. As the new ranges become more established, purchases, habits and preferences may modify in favour of the new ranges. Thus, peripheral categories might change to non-core, and non-core to core over time, requiring retailers to monitor the stability of their consumer expectations and perceptions. Core, non-core and peripheral items may need to be re-categorised according to their specific store life cycles with consequences for merchandise selection and space allocation decisions. Without tracking for these changes, future growth areas are likely to be under-invested.

Diversification into non-core and peripheral ranges should be treated with care. Firstly, the need for expansion of non-food items naturally begs the question of space management of food items. The identified core ranges of both food and non-food should have an assured allocation, but the non-core food ranges may, over time, be competing for space with non-core and peripheral non-food ranges. Whilst there is always room for strong brands whose images compliment that of the store, or departmental level, the vulnerability of weaker brands may result in reduced facings, and unless stock turn can be improved, de-listing. Secondly, the decision to extend the range further into non-food categories (say, with own labels) may be influenced by both the stimulus generalization of the store image as a whole, the perceived fit of the new range to other established ranges and the current choice of ranges offered. The strength of the store name and reputation of specific ranges within categories could be used effectively to reduce the higher perceived risk associated with non-core and peripheral merchandise. Thirdly, extending ranges in non-core and peripheral areas such as clothing and entertainment may lead to more comparison shopping. With the customer spending more time in the store, the opportunity for increasing more unplanned purchases of other ranges within the store could be encouraged with creative merchandising and display, contributing to added value.

It is suggested that for future retail research, image should be measured not only on the store level, nor as totally separate product groups as suggested by Cardozo (1974), but by core, non-core and peripheral product groups. The implications of this for retail management are widespread; analyses of the target market's perceptions of "core" and "non-core" non-food categories may result in supermarkets within the same chain stocking clothes and not entertainments, or vice versa, or only in seasonal periods. Alternatively, as Cardozo (1974) concludes, "analyses of store image may be undertaken to explore opportunities for repositioning various portions of a store's offering, to identify dimensions along which such re-positioning might be accomplished.." The major retailers are becoming more aware of the importance of individual store profiling, particularly in the local marketing of food ranges and this study has identified that it has scope in the non-food categories.

Further research is warranted in three specific areas: (1) Analysis within the category, at the product group level, to identify specific directions for expansion. For example, within the HBA category, there is an enormous variety of purchasing experience, in which the motives and context for buying up-market beauty products may have different implications for store positioning than buying unsought goods such as a range of headache remedies. Perceived risk may also be reduced at the level of ranges within categories or assortments, and between brands. (2) Examination of image differences between food and non-food categories. To identify if core, non-core and peripheral product groups exist across food categories and their relative compatibility with the store image. With this information retail management may then choose to contract, reposition, or expand ranges to strengthen their store image. (3) Non-loyal shopper perceptions. This study has focused on loyal shoppers, but how do their category perceptions differ to those of the non-loyal shopper? If retail management seek to convert these into loyal shoppers, they need to discover the extent of importance they attach to these categories.

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The location and merchandising of non-food in supermarkets

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Abstract

Refers to the tendency in UK supermarkets for diversification into non-food areas which has emphasized the need to improve how and where the products are presented to the customers. Service diversifications such as dry cleaners or opticians, have traditionally been situated as separate "shops" behind the checkouts. Contrastingly, product range diversifications such as stationery, entertainment and clothing have tended to be incorporated into the main shopping aisles. Attempts to identify whether consumers would prefer these non-food ranges to be differently merchandised and more specifically, whether consumer preferences are different between retailers? Asks what alternative display formats may be used and which specific ranges are considered appropriate for these formats. Using six different retail multiples, examines the perceptions and preferences of 500 shoppers from the results of an attitude survey carried out in two UK cities. Finally, provides recommendations for retail management.

Keywords

Supermarkets, merchandising, layout, display, consumer behaviour.

Paper 3. The Location and Merchandising of Non-Food in Supermarkets

Introduction

Over the past ten years supermarkets have expanded in numbers, size and product range, while store layouts have remained virtually the same [1]. For traditional grocery products, the retailer's need to maximise space and profitability was combined with the consumer's need for convenience. More recent expansions of clothing, entertainment and stationery products to the supermarket merchandise mix have meant that consumers are now buying a much greater range of goods in the supermarket environment. Many of these items involve relatively high outlay above that of traditional grocery products, with an expected increase in perceived risk in purchasing.

This poses a dilemma for retail management; where should these non-food ranges be located within the store? The initial tendency was to locate these products in the main shopping area to generate impulse purchasing. This resulted in ranges not achieving their full potential due to some consumers avoiding, ignoring or not perceiving the products as intended. One suggested solution is to offer "stores within stores" [1], whereby the merchandising of separate sections, aisles or departments is handled uniquely and provide distinctive images. By this route, shoppers can quickly locate specific ranges of products.

If the supermarkets intend pursuing the more profitable routes of non-food diversification to augment their core food ranges, they must consider the advantages of modifying the established supermarket store layouts. A greater emphasis on specific ranges with an appealing layout could provide more attraction to the store resulting in an overall enjoyable food shopping experience. For example, Tauber [2] suggests shoppers might be stimulated by sensory inputs (such as the texture and visuals of display). Shoppers might also develop unique relationships with a store's ambience, partly contributed by the display and location of merchandise. A more conducive location of certain ranges could encourage greater browsing and merchandise displays may dispose consumers to buy on impulse [3].

Little accessible empirical evidence exists in this area, as most research tends to be conducted by the practitioners on an *ad hoc* basis. In this paper we examine consumer preferences for merchandise location to identify if they are similar or different to current retailer practice. We are particularly interested in consumer attitudes toward non-food ranges, and if and how these differ between store profiles. The paper is presented in four sections. The first gives a background to the evolution of supermarket layouts. The second gives the methodology of the survey. The results and discussion are presented in the third section. Section four concludes by offering recommendations and implications for retail management.

The store environment

The physical nature of the store, its layout, appearance and physical presentation of goods forms a major supporting role in the retail product offering [4]. The purpose of in-store merchandising is to make products more attractive and visible and thus motivate purchase. Within department, variety and speciality stores, display and lifestyle merchandising can offer additional attractions. The nature and homogeneity of food stores has a more limiting role for retailers with food shopping viewed as something that needs to be done. In the self-service supermarket environment, merchandising can be a vital but more subtle marketing tool whereby shopper behaviour is modified and manipulated. Cook and Walters [5] advise that supermarket merchandisers "should not experiment....but rather stay with store layout patterns with which the customer has become familiar and which do at least respond to the need for convenience and a rapid shopping visit". They add "Conversely, ladies wear shopping is seen as leisure shopping and enjoyed. It follows that visual merchandising can be creative in this situation". The influx of new grocery competition [6,7], all offering "convenience and rapid shopping" has meant that the food multiples can no longer afford to follow these traditional principles and multiple food retailers are seeking new alternatives to make food shopping a more pleasurable experience. The growth of the one-stop shop concept combined with the need for higher margins has encouraged the introduction of service and product diversifications in food stores. Preoccupied, merchandising considerations have been overlooked. Many supermarkets have expanded into the specialist ranges but have not carried through all of their merchandising techniques. The effect can be somewhat confusing. Diverse products such as CDs, clothing and stationery are sometimes displayed in identical fixtures next to fast moving consumer goods. Non-food categories are rotated, as retail management grapple to find the optimum store location. There are a variety of merchandising techniques to aid the food retailer. This study focuses on two of the most critical for supermarkets: layout and product category location.

Store layout

There are three main layout options available to retailers, the grid, free flow and boutique [8]. The straight parallel aisles of the grid pattern have been commonly adopted by supermarkets because management is able to utilise space effectively and gain maximum exposure to merchandise by steering customers to walk around the whole store. The weaknesses of the grid include the monotony/uniformity of straight continuous gondolas, particularly in larger superstores, and the psychological effect on customers of feeling constrained and rushed, thus reducing the time they spend browsing. The free flow layout in comparison, encourages an unstructured traffic flow and greater browsing by arranging fixtures in more irregular patterns. Its weaknesses include inefficient space utilisation and customer disorientation. The boutique layout divides the selling floor (or part of it) into individual speciality shops which may be distinguished by changes in flooring, fixturing or displays. This style of layout may be a result of using concessions (named shops within shops), but its main advantage lies in a "more complete orientation of design towards the target group" [9].

Left to their own devices consumers would prefer to shop around the perimeter of stores and, consequently, these areas tend to be more congested than central aisles. Congestion is intensified at major centres of attraction e.g.

delicatessen and fresh foods, which are placed around the store perimeter to enable easy servicing [9]. Aisles are up to three times wider than they were ten years ago to encourage more browsing, although this requires careful control otherwise customers shop only one side of the aisle. A more recent introduction has been a zigzagged wines and spirits aisle to reduce walking to a browsing pace [10]. There is growing evidence of some UK food retailers using variations of the three layout options; such as pursuing the free flow concept combined with the grid, a boutique approach for concessions behind checkouts, or more recently relocating some ranges such as clothes, as a fashion "shop" within the main central shopping area. While it appears that the supermarkets are moving towards the multi-layout approach, the grid still dominates the majority of the shopping area.

A number of guidelines have been developed by researchers and practitioners alike to aid merchandise location, but the underlying principle is to position high-demand items to "pull" the consumer through the store past other low-demand lines. The choice of location is dependent on consumer behaviour, volume of traffic and product type. Buttle [11] suggested that items requiring "deliberation" before purchase should be located away from the main arteries to avoid congestion. Conversely, he advised that, "impulse lines should be where the population is densest". In measuring performance, location quality has been found to have a larger effect on sales of low volume than high volume products [12]. "Prime" locations have been identified through tracking studies and controlled experiments. Magazines sold at checkouts generate double the sales per square foot compared to those in a main aisle display [13]. Merchandise location can be an effective tool for boosting slow selling lines if used carefully, but there is a tacit agreement between retailers that relocating products too often frustrates customers and may result in the opposite effect.

In store behaviour

From 50 per cent of unplanned purchasing activity which takes place in self-service foodstores, about 25 per cent is influenced by the external environment [14]. Within the store environment, this may include the power of branding, point of sale stimuli, personal selling and store atmospherics. The opportunity for using these factors to best advantage will be influenced significantly by the style of layout and display location.

Rows of aisles or similar large quantities of display may be less effective in triggering a more thorough information search and browsing compared to varying the layout format frequently. This is because our senses tend to be dulled with exposure to continuous stimuli, referred to as “adaptation theory” [15]. We suggest that changes in shape, size or direction may also provide anchor points for learning, so encouraging more detailed information search. Lack of continuity, through changes, may be likened to the interruptions in advertising that have been suggested by Lewin [16] for improving memorability. Furthermore, unique positions such as end of aisles provide greater visibility and, hence, a greater opportunity to view products.

Faced with a continuity in layout, shoppers will rely more on quick decision rules to make the shopping task easier. Selective perception enables shoppers to screen out much visual clutter which is considered incompatible with their existing value systems. When consumers are faced with time-poverty there is a greater tendency to rely on peripheral cues as a means of assessing the worth of a product compared to relying on the detailed quality of the arguments presented by any in-store marketing stimuli [17]. Under peripheral processing, more unplanned purchases are likely [17]. Peripheral cues, according to Petty and Cacioppo [18], include visual stimuli like branding and packaging, but display aesthetics and location would also be expected to be a part of this. Source effects are also considered to be an important peripheral cue. A store name might have some effect, as a source in the evaluation of products or brands. In some cases, shops within shops emphasising the brand name may be influential. We consider that display locations emphasizing branding may be more important for items which are less frequently purchased, or for new category items, because of their associated perceived purchase risk. This would obviously include many of the new ranges expanded in supermarkets in recent years.

The more extensive supermarket layouts do not appear to cater well for the time poverty shopping segment. This can be improved by encouraging, "sufficient browsing so as to select additional products" [19]. Davies and Bell [20] suggest the male grocery shopper in particular, while seeking convenience, could be tempted to spend more time and money in store if "a more interesting, less clinical layout" is introduced by the food retailer.

Of course, retailers can experiment by testing consumer opinion with small changes in the layout. However, this method is limiting in the styles of different layout which can be tested due to the costs involved. This study is concerned with understanding consumer preferences for alternative merchandise layout and locations in store. It is hoped this will encourage practitioners and academics alike to develop additional research in identifying the reasoning behind these actions.

The study

The initial aim of this study was to examine whether consumers are content with the current in-store display locations on offer for different merchandise categories. Six non-food merchandise categories are examined here. After consultation with retail management, it was considered appropriate to examine the established convenience goods categories of household, health and beauty aids and home products, together with the newer categories of diversifications into clothing, stationery and entertainment.

To examine the satisfaction with current in-store locations, we investigated whether new categories of merchandise require different in-store display locations from established categories, and if so, what they were. We felt this was important to examine, due to the increasing variety of new categories being considered by many supermarket retailers, which at one time were only stocked by the traditional specialists. The study focuses on six major food retailers (identified as stores A-F), excluding those with a low presence of non-food ranges (i.e. discounters and small town centre and edge of town stores). The second aim was to examine how any preferences for display locations might vary across specific stores.

A quota of 504 supermarket shoppers was selected from the East Midlands area. The quota for each store approximated to their respective market shares for the region, with the largest retailer comprising of 28 per cent of the quota and the smallest comprising of only 10 per cent. Since this study is concerned with how in-store display locations may vary across different categories, it was felt most practical to focus on large format stores, which would have greatest scope for diversification into new categories. Hence, only superstores (above 25,000 ft^2) were examined. Data collection involved a structured questionnaire, designed to test the above research questions. Professional interviewers trained by the Market Research Society interviewed shoppers in two major cities in the East Midlands during 1994. Results were analysed using SPSS.

The display locations

Prior observation of the display locations in the leading supermarkets indicated that four major types of display locations were commonly featured which potentially might be important for each merchandise category. It was considered important that only major forms were analysed because these would be most familiar to the sample respondents. If respondents are unfamiliar with a display location format, they are unlikely to be able to express their true feelings, so increasing respondent bias. This study restricts the options to four types of display locations and so the relative importance of these is the aim of the study. The four types are:

(1) main <u>aisle</u> displays within the main shop (similar to those normally used for food);
(2) displays separate from food on different flooring or <u>fixturing</u>, but within the main shop;
(3) displays outside the main shop floor in separate <u>boutique</u> format; and
(4) displays as separate shops located within the supermarket, but with a different <u>name</u> or concession.

These four display locations were used for testing each non-food category: clothing, household, home, health and beauty aids, stationery and entertainment products. Consumers ranked their relative preferences for each display location against each non-food category. A four-point scale was used for measurement, ranging from 1 = most important to 4 = least important. These preferences do not indicate whether they are store specific. This could be significant because preferences might be influenced by familiarity with specific kinds of display location as a result of patronizing only certain stores (i.e. the store loyal consumer). Therefore, display location preferences above were cross-tabulated with typical store patronage to identify any store specific preferences.

Consumer preferences

The relative preferences for each display location option for each non-food category are recorded in Table 8.

Table 8 Level of importance attached to each display location per non food item (by percentage frequency).

		Display location			
Non food item		**Aisle**	**Fixturing**	**Boutique**	**Name**
Clothes	(A)	30.0	59.7	63.4[a]	48.3*
	(B)	70.0[b]	40.3	36.6	51.7*
Household	(A)	93.2	94.6[a]	8.1	4.2
	(B)	6.8	5.4	91.9	95.8[b]
Home	(A)	58.4	71.0[a]	44.1	27.0
	(B)	41.6	29.0	55.9	73.0[b]
Health and Beauty	(A)	87.5	91.8[a]	13.2	7.8
	(B)	12.5	8.2	86.8	92.2[b]
Stationery	(A)	54.9	66.1[a]	45.8	34.4
	(B)	45.1	33.9	54.2	65.6[b]
Entertainment	(A)	32.7	51.8	64.8[a]	51.6
	(B)	67.3[b]	48.2	35.2	48.4

Notes:
(A) Labels 'most' and 'of much importance' combined
(B) Labels 'least' and 'of little importance' combined
[a] highest percentage for item under (A)
[b] highest percentage for item under (B)
[c] Figures across approximate 200, not 100 due to combined responses above. Figures do not tally exactly to 200 due to rounding.

With the exception of stationery, categories appear to be clustered for preferred display location according to whether they are traditional or newer categories. Thus clothes and entertainment, the most recent introductions for many food retailers, are considered to be best located separately from the shop floor of the traditional categories. Since this is a popular location choice of stores, this might infer that category familiarity has a mediating effect on preferences of display locations. What is evident is that four out of the six categories are considered best displayed away from or different to the conventional aisle locations reserved for foods, with the exceptions of household and health and beauty aid (HBA) items that tend to be more established ranges for many stores. This, perhaps, conveys a perception by patrons that many recently introduced categories do not mix well with food. It is also suggested that perceptions of congruity between categories may be used as a cue of category acceptability. Inappropriately mixing some categories with food may also be considered unhygienic.

Figure 7 Most important (best) and least important display location for different non-food items

Display location		Most important	Least important
(i)	Aisle		Clothes and entertainment
(ii)	Fixturing	Household, home, health and beauty and stationery	
(iii)	Boutique	Clothes and entertainment	
(iv)	Name		Household, home, health and beauty and stationery.

There are a number of other reasons which may account for some of the results. Although "aisles" is a popular choice of display location for HBA, fixturing is most preferred. Health and beauty products are often purchased not by the end user, but as a gift, and categories located in special positions away from conventional aisles may appear more expedient and perhaps easier to find for shoppers buying unusual purchases or in a hurry. Locations would be easier to identify by being more visible to store traffic. Alternatively, these “privileged” positions may convey an appropriate ambience and atmosphere conducive for browsing.

One reason for the popularity of using separate boutique style shops outside the shop floor for clothing and entertainment is that they are relatively high outlay items, with an associated security risk. If carried around in a supermarket trolley along with other less important purchases, there is a greater threat of pilferage, with associated consumer unease. Conversely, consumers prefer stationery, as a relatively low ticket item, to be located in alternative formats. The preference in fixturing over aisles for stationery may reflect consumer desires for: ease of selection, e.g. separate fixturing may provide the opportunity for merchandise co-ordination across stationery ranges; and ensuring that fragile items (e.g. envelopes) do not become soiled or creased. If they were located with food items, there would be a danger they would become damaged in the bottom of a full trolley of goods.

The relative importance attributable to each display location by non-food categories was cross-tabulated and analysed for particular store patronage. Simple association tests were conducted using the X^2 statistic (Table 9 shows the results). There is no association between preferences of display locations and stores patronized for all home products. Perhaps such goods are expected to be located in similar places across all stores. Hence, it was felt there was less need to analyse the data for home products by store type. One explanation might be that the range of home items is relatively standardized between stores, so requiring similar display formats. Since results are significantly different between stores patronized for clothes, household, health and beauty, stationery and entertainment goods, these were further analysed by store-level.

Table 9 Degree of association between display location preferences per non food item and store patronage

Sample (n)	Display location	X^2 calc statistic	P	Significance
	Clothes			
464	Aisle	12.57	0.028	*
464	Fixturing	12.98	0.024	*
465	Boutique	4.36	0.499	N/S
466	Name	22.49	0.000	**
	Household			
482	Aisle	36.33	0.000	**
480	Fixturing	39.82	0.000	**
479	Boutique	39.56	0.000	**
478	Name	38.58	0.000	**
	Home			
474	Aisle	3.33	0.649	N/S
473	Fixturing	7.18	0.207	N/S
472	Boutique	7.21	0.206	N/S
471	Name	1.93	0.858	N/S
	Health and beauty			
479	Aisle	15.19	0.100	N/S
478	Fixturing	22.31	0.0005	**
477	Boutique	17.47	0.004	**
466	Name	18.45	0.002	**
	Stationery			
468	Aisle	12.77	0.026	*
466	Fixturing	18.45	0.002	**
467	Boutique	16.75	0.005	**
468	Name	14.20	0.014	*
	Entertainment			
456	Aisle	4.90	0.428	N/S
456	Fixturing	13.96	0.016	*
457	Boutique	10.54	0.061	N/S[a]
459	Name	11.28	0.046	*[b]

Notes: * Significant at 0.05
** Significant at 0.005
[a] Marginal, but not significant at 0.05.
[b] Marginal, just significant at 0.05.

Store-specific preferences

Table 10 shows how store patrons are grouped as regards preferences for each display location of each non-food category. In examining clothes, the two most preferred display locations were separate fixtures or boutiques, with aisles considered the least important display location for most stores. Separate shops appear to be considered a popular display location by one in five of all patrons, with the exception of store E. Clearly, most shoppers believe clothes should have a distinctive identity, physically separate from food counters, with fixtures and boutiques as the most popular choices.

In examining the household category, the most important display locations were considered equally to be fixtures and aisles, with little variation between most stores. Generally, boutiques and within-store shops are very unpopular choices. In examining health and beauty, aisles and fixturing are considered virtually equal in terms of importance among four stores, except for stores A and D (in which fixtures are preferred). In examining stationery, while most stores prefer different fixturing, closely followed by aisles, marginally more store E shoppers feel the boutique format is more important than fixtures. Store D shoppers consider boutique to be most important, followed by name. Feelings towards the most important display format for stationery appears to be very store specific. In examining entertainment, boutique is considered most important for shoppers from four of the six stores, in which fixturing is equally important with boutique for the remaining two.

Clearly the results indicate that some store D and store E shoppers are different from the norm. This could be attributed to the unique layout style of store E, which combines the free flow concept together with the traditional grid pattern. Further complexities arise with stationery and entertainment. The danger facing store management is that not only should display formats and locations be selected for particular non-food categories, but that patrons may vary according to their store patronage. Hence, merchandisers should not consider a general display location for all categories but use research within each non-food category to identify specific requirements. Additionally what suits one store profile may not be appropriate for another. Clearly, the typical patrons of store D and store E hold different sets of perceptions from other shoppers.

Table 10 Most preferred display location by retailer

	Non-food category					
Retailer	House	HBA	Home	Stationery	Enter't	Clothing
A	F	F	F	F	FB	FB
B	FA	FA	F	F	B	B
C	AF	FA	F	F	B	F
D	AF	F	F	B	B	BN
E	FA	FA	A	B	B	F
F	FA	FA	F	F	FB	FB

Key: A = Aisles, F = Fixturing, B = Boutique, N = Name

Since clothes and entertainment can be relatively large outlay products there is an increase in perceived performance risk. It is for this reason they might be expected to be shopping goods, and in some cases speciality goods, in which the brand name is sought before shopping, and the name becomes more influential in determining what is purchased. It was anticipated that shops within shops might offer more assurances to the regular shopper as to where specific brands can be obtained within the confines of a large spacious superstore (e.g. consider the focused range of Burtons within a Debenhams store). Results indicated that one in five respondents expressed a desire to have shops within shops for entertainment and clothes. This was a significant increase on that scored for other non-food categories. Although this might suggest shops within shops could be designed for a niche market, named shops were not the strongest preference indicated for either of these categories. For clothes, there was relatively less preference indicated for named shops, with most requiring either fixturing or boutiques. This would suggest that the importance of using separate shops within a supermarket may be overstated for many consumers and that the power of providing a separate identity within a large store may be less important than other factors.

Conclusions and implications

Traditionally, food shopping has been viewed by many retailers and consumers alike as a necessary but unpleasurable experience, compared to other types of shopping which are viewed more as “leisure” or recreational shopping. The diversification of supermarket ranges into non-food areas such as clothing, entertainment and stationery provides retail management with a new opportunity for developing a more pleasant shopping experience through creative merchandising.

The survey results indicated that contrary to current retailer practice, most shoppers preferred to see non-food categories displayed in formats other than the main shopping aisles. It could be that in the development of out of town, one-stop-shopping, consumers are missing the variety of shopping formats offered by the High Street. Food retailers have only partially addressed this by incorporating bakeries, fishmongers, butcheries and delicatessens mainly around the perimeter of the supermarkets. Contrastingly, the majority of grocery, frozen food and dry goods remain in a grid layout. This research suggests that many consumers may find the current emphasis on the grid layout inconvenient and monotonous. Furthermore, the tendency to mix in high demand items to pull consumers through the stores may have been successful when the average shopping visit could cover the complete shopping area but in the larger format stores this is not as successful, resulting in time poor shoppers “cherry picking”, leaving "black holes" [21].

The boutique format was rated almost equally with fixturing, suggesting that shoppers do seek alternative modes of layout and format. Although respondents were clearly aware of the shops within shops concept, they were not convinced for a complete change over to this format in their regular store. Perhaps the solution lies in a compromise between shops within shops combined with areas of different fixtures / flooring to break the monotony of the grid pattern. Additionally, superstores could develop the "zoning" concept originally suggested by Floch [22] for hypermarkets, whereby those shoppers seeking a rapid shopping visit were able to locate items in a smaller area without the frustration of shopping the complete store. The free flow layout has not been fully exploited for supermarket use. This format was not examined in this study and requires greater depth to investigate its relative disadvantages. Many consumers may also seek more reassurance from different merchandise locations for the newer categories associated with higher perceived risk. This study suggests shopping experiences in a category may influence display preferences. Stores therefore need to monitor display preferences as they experiment with their merchandise mixes.

One avenue of future research is to examine why preferences for different display formats appear to be somewhat store specific. One proposition is that store-specific display preferences (Table 10) might be reflected in variations between ranges of merchandise within each category. Another factor would be variations in store profile motives and perceptions. Future research is also recommended in micromarketing to individual branch level to examine patronage preferences to reinforce or enhance store positioning. It is suggested that once optimum store layouts are determined according to size, location of store and typical length of visit by shopper typology, more logical locations and adjacencies of both food and non-food categories could be examined at the product group level for further refinement.

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The Dimensions of Assortment: A Proposed Hierarchy of Assortment Decision Making

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Abstract

The merchandise assortment plays a fundamental role in retailing; it conveys the positioning of the retailer, and is a key determinant of image and patronage. However, existing literature covering a 50 year period is somewhat fragmented. A key problem with the literature is that it does not distinguish between different levels and dimensions of assortment causing potential ambiguity in their interpretation in the modern retailing context. The lack of standardised terminology could potentially inhibit future assortment research in, for example, assortment measurement. In reviewing the literature, the critical dimensions of assortment are clarified with conceptual definitions and a hierarchical classification of assortment being proposed. Further, the assortment research is examined, identifying an imbalance between operational and strategic assortment research. As retail assortments expand and saturate, the need for assortment measurement research is argued with associated implications for retail management.

Keywords: Assortment, merchandising, dimensions, definitions, framework.

Paper 4. The Dimensions of Assortment: A Proposed Hierarchy of Assortment Decision Making

Introduction

A key function of retailers is to provide “an assortment of products and services” for consumers (Levy and Weitz, 2004 p.7). Thus, the product assortment plays an essential role in retailing strategy (Simonson, 1999, p.366), contributes a major dimension of store image, (Berry 1969; Lindquist 1974; Mazursky and Jacoby 1986) and is an “important component of the retail mix” (Koelemeijer and Oppewal, 1999 p. 341). Despite this status, the literature focusing on the assortment is fragmented. Indeed, over a period of nearly fifty years, assortments have evolved and changed shape, involving new management processes, yet the same definitions are still in use causing potential ambiguity in their interpretation in the modern retailing context. There is a need for more precise terminology, particularly recognising newer developments such as category management. The adoption of standardised terminology is also important in order to assist progress in future assortment research; with no general agreement in the use of existing terms and dimensions, it is difficult for researchers to successfully develop the means for measuring and controlling assortments. In contrast, considerable attention has been assigned to describing and analysing the operational processes and practice of managing assortments. Furthermore, given the modern propensity for retailer assortment expansion, overlap and saturation, it is also surprising that little attention is given to the strategic issue of assortment width and consistency. Limited discussion exists into “what goods are made available and how retailers might assort them in innovative ways” (Savitt, 1984), with little guidance offered for retail managers in the role played by the assortment to achieve a consistent image (Davies and Ward, 2002, p.153).

This paper seeks to address these shortcomings in several ways. The first is to review the assortment literature with a view to examining assortment composition and roles over the previous 50 years. This will enable us to (i) clarify the levels of assortment and (ii) identify the value of consistency as an assortment dimension. From this we propose updated definitions for assortment and its dimensions. A third objective of the paper is to outline a hierarchy of assortment levels to facilitate improved management decision-making. Finally we also evaluate previous assortment studies to identify where assortment research is lacking and the directions for future research into measuring and controlling assortments.

Assortment Definitions and Roles

Assortment definitions

Within the retail and marketing literature, academic interpretations and definitions of assortment are diverse. An early marketing definition views the "selling assortment" as the "total number of items which can be sold by a firm in given transactions" (Balderston, 1956, p. 175). Furthermore, Hollander (1966) interpreted assortment at the aggregate retail level of "number of lines" on offer. Simonson (1999, p. 347) expands the description to include "the total set of items offered by a retailer, reflecting both the breadth and depth of offered product lines". The economics view interprets the assortment as a 'set' of market goods that may include substitute, complement and independent items of consumption (Betancourt and Gautschi, 1990). Thus, according to one stream of literature, assortment may be interpreted holistically and defined as the total merchandise offer or "***store assortment***".

A second stream of literature defines assortment as the selection (Berman and Evans, 2001, p. 466), "range of merchandise offered to customers" (Baron, Davies and Swindley, 1991) or "range of style, size and colour choices offered at a particular time" (Lee and Kunz, 2001). Thus, the term assortment is used synonymously with "choice" (Ghosh, 1990, p. 10) or "depth" (Samli, 1998) of selection in a product group (Ghosh, 1990 p. 10, Newman and Cullen, 2002 p26). Latterly, product groups have been organised into broader classifications or categories that represent "an assortment of items (SKUs) the customer sees as reasonable substitutes for each other" (Levy and Weitz 2004, p. 365). The category grouping thus introduces a second layer of assortment within the store; termed both "aggregate category assortments" and "SKU assortments" (Cadeaux, 1999). The category level definition of assortment is also expanded to include the breadth in a category (Dhar, Hoch and Kumar, 2001, p. 171). A subsequent level, termed the "***brand assortment***" suggests a subset of assortment whereby the mix of brands varies independently of the number of categories (Savitt, 1984, p. 51). In offering a selection of categories, retailers thus engage in multiple assortments. Confusingly, the singular and plural terms of assortment may be used interchangeably, referring to either the overall store assortment or individual assortments of merchandise groups e.g. "***category assortment***".

Further examination reveals that retailers do not exclusively compile assortments. Manufacturers and wholesalers provide an assortment of products and services (Handelsman and Munson 1985 p108). Thus, the retailer assortment may be viewed as another layer of assortment in the "Macromarketing System" (Cadeaux 1992 p 30), with potential disparity emerging between the assortments offered by retailers and manufacturers, and the assortments desired by consumers (Cadeaux, 1997). Consumers similarly select an assortment of items but for personal consumption (Lee and Steckel 1999), thus questioning the traditional marketing focus on consumer purchase of a single brand (Wind (1977). Indeed, the earliest definition of the assortment concept emerges as "the collection, which has been assembled by consumers in the hope and expectation of being prepared to meet future contingencies" (Alderson 1965). Potentially, therefore, a multi-tiered system of product assortments may exist across the consumption system.

Assortment roles

A search of the literature reveals that the product assortment assumes a number of roles in retailing. The economics view holds that the assortment provides a link between supply and demand; "Assortments are collections of goods and services that allow consumers to fulfil a wide variety of needs at one point in time through one-stop shopping" (Koelemeijer and Oppewal, 1999, p.320). This interpretation implies that the essence of place / time utility is captured and adequately satisfied through the one-stop shop. Whereas in reality, each shopping experience differs according to consumers changing needs. Retailers therefore need to match "changing arrays of products with changing demand for assortments from households" (Cadeaux, 1997, p.197). This continuous matching or gradual repositioning of assortments with the changing retail environment (Corstjens and Doyle, 1989) elevates the product assortment to arguably one of the more "dynamic dimensions of retailing" (Brown, 1990, p.146) given to shifts in breadth, depth and consistency. Attempts have been made to link these shifts or changing patterns of assortment with retail evolution. In extending the wheel of retailing theory, Savitt (1984 p10*)* hypothesised that as retailers trade up, some of the assortment may be rationalised. Similarly, the Retail Accordion theory hypothesizes alternation between wide assortment and narrow line specialist retailers (Hollander, 1966). It is therefore unsurprising that assortment emerges, alongside another mix variable; price, as a descriptor or classifier of store formats. Based on the width or depth of their assortment, retailers may be described as 'limited line', 'speciality', 'category killers', 'variety stores' or 'mass merchandisers' (Lewison 1997; Levy and Weitz 2004; Gist 1968; Hollander 1966). Originally, a clear distinction was drawn between retailers offering either *"variety"* (wide assortment) or *"assortment"* (deep assortment) to avoid "semantic ambiguity" (Gist, 1968). But distinctions became blurred as retailers combined assortment strategies to meet competition, offering both variety and depth for example, IKEA offer a wide variety of home furnishings and accessories, with considerable depth of variants in the majority of product categories when compared with the specialist furniture retailer, MFI.

Strategically, the assortment decision can be interpreted as a key element of the marketing mix in attracting consumers into the store (Kahn, 1999). The "product" variable translates into the total assortment on offer (Onkvisit and Shaw, 1981) and in certain markets, is deemed a more important mix variable than price (Stassen, Mittelstaedt and Mittelstaedt, 1999). While the retail mix includes a bundle of goods and services (Lazar and Kelley, 1961), it is the (product) assortment that tangibalizes the retail strategy and positioning. "The assortment profile identifies, for the customer and the retail buyer, the positioning intent of the organization" (Walters and Hanrahan, 2000 p.175). Assortment thus becomes a strategic positioning tool to attract and retain core customers (Grewal *et al*. 1999). For example, the department stores, in response to post-war competition from discount general merchandise retailers, strategically shifted their product assortments “to those for which they held their strongest differential advantage” (Bucklin, 1983, p.157) i.e. high quality fashion oriented goods.

Assortment plays a key role in store image. In summarizing the literature on image, Lindquist (1974) proposed that there were a total of nine different attributes that contributed to the image perceptions consumers created about a store. Within these, merchandise assortment / selection received most scholarly mentions as an image attribute. Indeed, a number of empirical studies have found that the retailer’s assortment along with other key attributes (e.g. location, price, promotion, personnel and services offered), is an important factor in store choice (Kelly and Stephenson 1967; Kunkel and Berry 1968; Buttle 1985; Mazursky and Jacoby 1986). Moreover, assortment is seen as a key determinant of retail patronage (Arnold, Oum and Tigert, 1983).

Within store, consumer decisions and choice processes are affected by the set of product variants offered in the assortment (van Ryzin and Mahajan 1999; Smith and Agrawal 2000), the current inventory levels of the variants (Mahajan and van Ryzin, 2001 p.334) and space allocated to each variant (Borin, Farris and Freeland, 1994). Thus, space allocation and inventory are intrinsically linked with product assortment decisions (Urban, 1998). This view implies a unidirectional process whereby the assortment influences consumer behaviour. Similarly, it has been argued that retailers and marketing texts treat the role of assortment too narrowly as simply a function in satisfying consumer wants. Indeed, it is contended that assortments can shape consumer preferences and influence their future purchasing(Simonson, 1999).

Levels and Dimensions of Assortment

The literature highlights that assortment definitions have one common factor. Whether assortment describes the whole merchandise offer (Hollander 1966; Simonson 1999; Walters and White 1987), or simply the depth of the offer (Lewison 1997; Levy and Weitz 2004), it is essentially concerned with the number of individual product units. Various ‘groupings’ of products are then applied in order to manage the scale of the *store* assortment. For example, product class describes the broad merchandise classification such as health and beauty aids (Cardozo 1974-5). Certain fashion and mixed merchandise retail stores feature departments, which are defined here as “a section within a store that carries groups of merchandise the consumer views as complementary” e.g. The active sports department in the John Lewis department store which features both sports equipment and men’s / ladies active wear. Furthermore, the trend for merchandise scrambling, particularly within the grocery retail sector (for example Tesco’s expansion into non-food categories such as men’s and ladies apparel) coupled with the introduction of category management, has facilitated the development of the category level within a retailer’s merchandise offer. Category is defined here as “a distinct, manageable group of products that consumers perceive as related and /or substitutable” (Gruen and Shah, 2000) for example, breakfast products. A key distinction appears to be in the type of retail business; with grocery typically adopting the category approach, whereas larger non-food retailers for example Marks and Spencer or House of Fraser tend to group first by department, then category. Furthermore, substitutability within the category suggests a generic; more stable group classification, whereas departments are likely to experience greater change due to the complementary nature of the products. For example, the Boots baby department originally carried large items such as prams and cots before rationalising the offer to concentrate on the faster moving, more compact, profitable lines of baby and nursery products. Thus within each category are a number of product lines, a line being defined here as “a group of related products” (Levy and Weitz, 2004) for example televisions, within the category of home entertainment at Debenhams.

In clarifying assortment dimensions, an early analysis classifies assortment into (1) commodity group (e.g. shoes), (2) the number of quality levels in each item type, (3) the number of sizes, colours and variants within each quality level and (4) degree of originality, style content (Balderston, 1956). Subsequent literature expands the first and third classifications into the concept of dimensions, predominantly referring to “width” and “depth” (Lee and Kunz, 2001). Table 11 summarizes the most frequently cited descriptors of assortment from a review of retailing texts and assortment articles. From Table 11 it is evident that the additional dimensions of “breadth” and “consistency” also feature. While the former two dimensions describe the size of the assortment (Handelsman and Munson, 1985), combined with the latter two dimensions they provide retailers with a framework for assortment strategy decisions. However, it is noticeable that some ambiguity exists in the use of width, breadth and depth, depending on whether assortment is interpreted at the store or category level. Indeed, while only two of the three terms are often cited, where all three of width, breadth and depth are used, these refer to different levels of assortment (Samli 1989; Ghosh 1990; Risch 1991; Levy and Weitz 2004).

In Table 11, assortment *depth* draws most agreement as the number of brands (Samli 1998; Kahn 1999) or SKUs (Dhar, Hoch and Kumar, 2001) offered within a category. Depth is further defined as, “The way of measuring the quantity of each item available” (Rosenberg, 1995, p10) and “the number of units of each SKU the store must hold to meet expected demand” (Ghosh, 1990 p296). It is generally accepted that extent of assortment depth dictates the degree of specializm offered by the retailer. A more precise interpretation of depth is “the extent to which items in a retail assortment are net substitutes from a household viewpoint” suggesting a relatedness of items (Betancourt and Gautschi, 1990, p. 150). This view is reinforced with depth interpreted as the variants within a product category, and variants as substitutes for each other in consumption (Kristensen, 1983).

Table 11 Dimensions of assortment in retail literature

Authors[1]	Level[2]	Width	Breadth	Depth	Consistency
Hollander, 1966	S	✓		✓	
Gist, 1968	S C/D	✓		 ✓	✓
Kristenson, 1983	S		✓	 ✓	✓
Savitt, 1984	S	✓	✓		✓
Handelsman and Munson, 1985	S		✓	✓	
Walters & White, 1987	S C/D	✓[3]		 ✓	
Samli, 1989	S C/D	✓	 ✓	 ✓	✓
Betancourt and Gautschi, 1990	S		✓	✓	
Ghosh, 1990	S C/D	✓[3]	 ✓	 ✓	
Risch, 1991	S C/D	✓[3]	 ✓	 ✓	
Mason, Mayer, Ezell, 1994	S C/D	✓[3]		 ✓	
Rosenberg 1995	S		✓	✓	✓
Messinger & Narasimhan 1997	S			✓	
Kahn, 1999	S C/D		✓	 ✓	
Simonson, 1999	S		✓	✓	
Cadeaux, 1999	 C/D	 ✓[4]			
Berman & Evans, 2001	S C/D	✓	✓	 ✓	
Dhar, Hoch & Kumar, 2001	 C/D		 ✓	 ✓	
McGoldrick, 2002	S C/D	✓		 ✓	 ✓
Krishnan, Koelemeijer, Rao, 2003	 C/D	 ✓		 ✓	 ✓
Ratchford, 2003	S			✓	
Levy and Weitz, 2004	S C/D	✓[3]	✓	 ✓	

Key: C/D = Category/ department assortment; S = Store assortment; V = Variety

Notes:
1. While an extensive range of texts and articles were consulted, a much smaller set provided a definition or interpretation. Where descriptors were derived, only the original sources have been cited.
2. Dimensions are cited at different levels of consideration e.g. store assortment, category assortment and brand assortment
3. These authors use the term *variety* to describe “the number of distinct product classes carried by the store”.
4. Cadeaux (1999) also uses width to describe the *brand* assortment

While commonly accepted as one of the original dimensions of the assortment, it is observed in Table 11 that “width” is cited less frequently than “breadth” in the literature. This is often due to both terms being used interchangeably (Ghosh, 1990) with little evidence of the terms being used concurrently. In attempting to differentiate between the two terms, width is used to describe the number or choice of distinct product classes or categories carried by the store (Gist 1968; Savitt 1984) and “the extent to which retailers carry generically different types of goods” (Gist, 1968, p. 41). Width is often used synonymously with variety, for example Risch (1991) defines it as “the number of different classifications carried by the store”. Thus, the selection of different categories or departments denotes the variety of the store assortment (Davies and Brooks, 1989). As a term, “variety” is also used to describe the total number of choices offered by the store and hence its interpretation depends on the context in which it is used whether store or category level.

Table 12 provides a comparison with the terms used to describe the product mix or assortment in the marketing literature, which may be attributed as a key source of the assortment terminology in retailing. For example, authors have most consistently used the term *depth* as the number of variants in a product line. As in Table 11, width and breadth are used interchangeably, with the additional dimension “length” being substituted for breadth (Boone and Kurtz 1999; Kotler and Armstrong 2003).

Table 12 Dimensions of Product Mix / Assortment used in marketing literature

Authors	***Width*** *(# lines)*	**Length/ Breadth** *(# products/ brands within lines)*	**Depth** (# variants of each product within a line)	***Consistency***
Assael, 1993.	✓ (Breadth)	✓[2]	✓	✓ (consistency not defined)
Boone and Kurtz, 1999.	✓	✓ (Length)	✓	—
Bradley, 1995	✓ (Breadth)	—	✓[3]	✓ (how closely product lines are in customer use, distribution, technology and production)
Brassington and Pettitt, 2003.	✓	✓	✓	—
Dibb, Simkin, Pride and Ferrell,1991..	✓	—	✓	—
Evans and Berman (1995)	✓	—	✓	✓ (defined as relationship among product lines in terms of their sharing a common end-use, distribution outlets, consumer group(s) and price range, p259-260)
Kinnear, Bernhardt, and Krentler, 1995	—	✓ (Breadth)	✓	✓(degree to which products are related to each other (p.291)
Kotler and Armstrong, 2003	✓	✓ (Length)	✓	✓ (how closely related product lines are in end use, production requirements, distribution channels, or some other way ..p.290)
Schoell and Gulitinan, 1988.	✓[1]	—	✓[3]	—
Stanton, Etzel and Walker, 1992	—	✓ (Breadth)	✓	—

Notes:
1. Width and breadth are used interchangeably.
2. Lines also have breadth and depth (p.408-410).
3. Depth is defined as the number of items within each line

The dimension “breadth” has most often been applied inconsistently, suggesting a lack of standardisation in assortment terminology. Handelsman and Munson (1985, p.108) define breadth as “the number of different product categories offered by the retailer” and are supported by Kahn (1999) who discusses “breadth of assortment across the store (narrow or wide)”. Conversely, breadth is described as “choice offered within each category” (Ghosh, 1990); “the number of brands offered in a category” (Dhar, Hoch and Kumar, 2001, p. 171), and the “number of units in each brand and style within each and every generic class of products”, echoing a previous definition of *depth* (Samli, 1998, p. 296). Furthermore, an empirical measure of breadth is proposed as “(average) items per store”, (Messinger & Narasimhan 1997; Ratchford 2003) contrasting an earlier interpretation of *store assortment*. Other interpretations of breadth are proposed from the demand viewpoint; “the extent to which items in a retail assortment are net independents”, (Betancourt and Gautschi, 1990) and “breadth of assortment implies that product categories satisfy separate, fairly basic needs and are complementary in the purchasing situation” (Kristensen, 1983). We suggest that greater semantic clarity might be achieved by applying definitions that differentiate between the store and / or category levels of assortment (see next section for further elaboration).

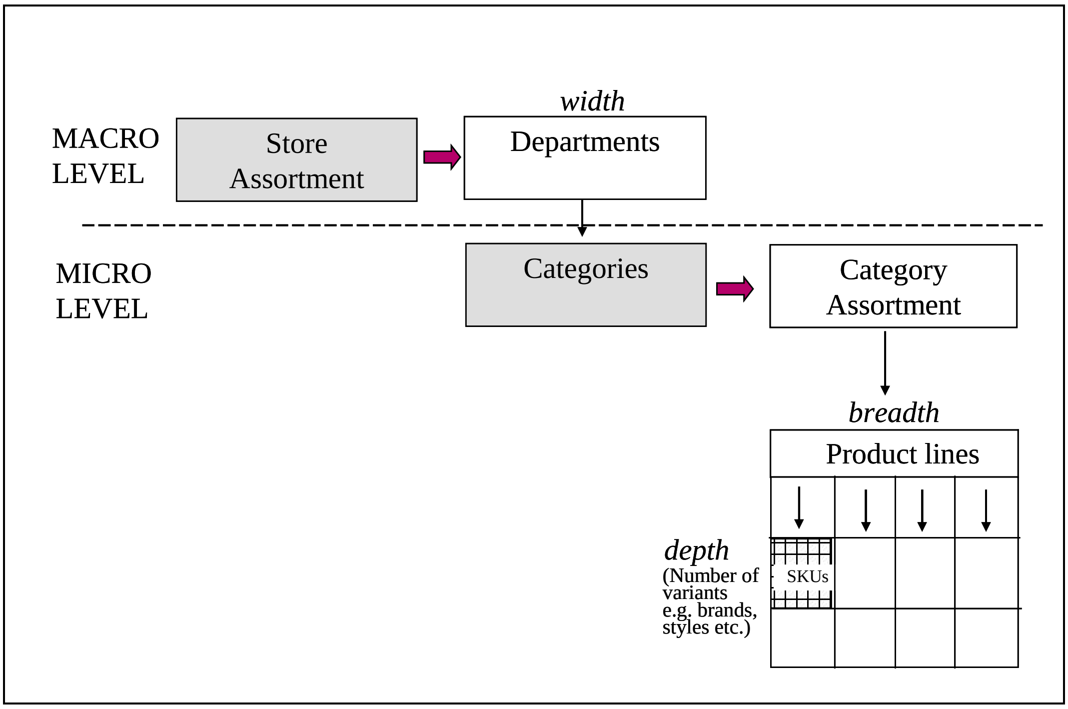
The dimension of consistency has least mention in the literature however, it is potentially one of the most important assortment dimensions from a retail strategy viewpoint. An early definition derived from marketing and retail buying texts refers to consistency as “the degree to which the different types of products that comprise the merchandise assortment are related” (Gist, 1968, p. 254) thus interpreting consistency as width at the store assortment level. The Wheel of Retailing theory suggests that retailers not only rationalise some assortments, but must also attempt to increase assortment consistency (Savitt 1984). Here greater consistency is interpreted as increased specialization across product areas suggesting closer relatedness across categories. The concept of ‘relatedness’ is applied more broadly to “different components of the merchandise assortment” having particular emphasis on “how they all relate to one another in the customer’s perception” (Rosenberg, 1995, p. 10) Similarly, associated terms “cohesion” (Ghosh, 1990, p. 324) and assortment “compatibility” are interpreted as the “effort taken to coordinate merchandise selection into a coherent statement to the customer” (Walters and Hanrahan, 2000). Merchandise co-ordination is particularly important in fashion retailing where a themed “story” is often used for a seasonal collection; and also for the customer expecting to assemble a complete outfit from the assortment offered by the UK fashion retailer Next, for example, who developed the lifestyle merchandising concept in the 1980s. A second interpretation of consistency is rooted at the category level and describes the stability of an assortment over time, termed “brand / item continuity” (McGoldrick, 2002). This is more recently defined as the “tacit promise made by a retailer to carry a given set of brands, sizes, flavours, colours etc. from one period to the next” i.e. full service stores such as Waitrose food stores. Here retailer commitment to consistency is associated with higher acquisition cost due to inability to take advantage of special trade deals (Krishnan, Koelemeijer and Rao, 2003) in comparison with for example, discounters such as Aldi or TK Maxx in the fashion sector. The importance of assortment continuity can be further illustrated by Marks and Spencer who were criticised by consumers for not providing sufficient style continuity in their core range of ladies intimate apparel (Hart and Dewsnap, 2001)

A Framework for Assortment Decision Making

It appears that the interpretation of assortment dimensions varies according to which *level* of assortment is being discussed. Within the literature, the notion of levels of assortment has evolved over time, representing the expanding retail assortments, particularly in the grocery and department store sector. When analysing the variations in definitions, terms, semantics and context of assortments in the literature, it is possible to construct the composition of the assortment (Figure 8). In order to elucidate terms for classifying past and guiding future assortment research, the concept of assortment has been divided into a macro and micro level respectively. The macro level represents the strategic level or store assortment decision of mix of departments, merchandise classes or categories to be carried by the store; for example ladies, men’s and children’s apparel, soft furnishings, electrical goods, toys, etc. at a department store such as Debenhams. The definition of ***width*** is thus proposed here as: *the number of departments or extent of different product classifications offered by the retailer.*

The second, micro level represents the department or category level (depending on size of the store), whereby we propose that ***breadth*** is applied to the category / department level of assortment and is defined as *the number of* *product lines carried within a category.* This way, the terms width and breadth are distinguishable as referring to separate levels of assortment. Furthermore, ***depth*** is thus defined as *the number of variants within each product line; each variant having individual sizes / colours*, (termed stock keeping units or SKUs). This forms the base of the micro level of the assortment.

Figure 8: A hierarchy of assortment decisions



The above dimensions represent a means of describing and quantifying the size of a specific assortment, whether at the store or category level. However, the fourth dimension of consistency is notably absent from the classification. At the macro level ***consistency*** can be defined as *a means of expressing and measuring the relatedness of departments / merchandise classes from the consumer perspective.* For the retailer, this is an important dimension as "the choice of which merchandise groups (or departments), to feature in an assortment is central to the strategy decision" (Walters & White, 1987), in particular the positioning of the store. At the micro level, this additional dimension offers retailers a means of tracking and controlling the category assortment to ensure that it is congruent with store positioning, particularly where new product lines are being introduced. However, methods for measuring this dimension at either the macro or micro assortment level are significantly absent from the literature. Indeed, the rationale for, and understanding of this ostensibly intangible dimension has not been addressed in the previous assortment literature.

Assortment Research Focus

The constraint of which assortment of products to carry in a finite space has long motivated scholars and practitioners to research the assortment selection 'problem' (Rajaram, 2001). Over time, many similar strands of assortment related research reappear and these can be broadly grouped into three particular areas of attention; space management, variety and consumer related. While these three areas emerged chronologically, they are not mutually exclusive, with overlaps occurring.

The majority of the literature is focused firmly at the micro level of assortment i.e. that concerned with merchandise at the product unit (SKU) level. Given that the accepted understanding of assortment is inherently based around "breadth" and "depth", essentially quantitative dimensions, the bulk of studies are concerned with the number of individual product units within a retailer's offer, modelling units within the assortment, or the factors affecting them, in order to improve operating performance. Rajaram (2001) observes that assortment management involves choosing a portfolio of products to maximise profits subject to budgetary and space constraints. It is therefore not surprising to find that a majority of the previous research has approached assortment from the space allocation viewpoint (Kahn, 1999, p. 289). Indeed, as retail selling space is a fixed resource, assortment decisions centred on "*which* products to stock and how much shelf space to allocate to those products" (Borin, Farris and Freeland, 1994). A stream of empirical research is devoted to the problem of optimising shelf-space allocation (see for instance, Corstjens and Doyle 1981; Bultez and Naert 1988; Bultez, Gijsbrechts, Naert and Vanden Abeele 1989; Urban 1998). In addition to optimisation models, previous space management research has featured experimental tests and commercial applications (Dreze, Hoch and Purk, 1994). In the grocery sector in particular, commercial space management models drive assortment decisions, informed by EPoS data, item and direct product profitability (DPP), combined with product / shelf dimensions to produce planograms.

Variety forms the second major stream of assortment related research possibly because assortment selection decisions influence consumer store choice, inventory investment and allocation of display space (Stassen and Waller, 2002). The importance of assortment variety is underlined by the fact that it is ranked third in patronage motivations after location and price (Hoch *et al.,* 1999). Indeed, it is believed that the larger the assortment the more likely consumers are to find a product that matches their exact needs (Baumol and Ide, 1956). Generally, consumers are uncertain about future preferences thus prefer greater variety to provide flexibility in their in-store decision making (Kahn and Lehmann, 1991). The effect of broadening assortments includes an increase in complementary sales to the existing customers; that is higher purchase per customer (Kristensen 1983). The satisfaction of a wider range of needs also attracts more customers from wider socio-economic groups and from greater distances (Balderston 1956 p179). Conversely, high variety has been found to cause confusion among inexperienced consumers due to the perceived complexity of the choice of options available (Huffman and Kahn, 1998).

Variety management requires knowledge of substitutability and complementarity patterns among items in the assortment (Koelemeijer and Oppewal, 1999, p. 319). However, whilst complementarity has been recognised as the essence of merchandising, it has received relatively little attention from academic researchers (Walters, 1991). The role of substitutes in retail assortments, on the other hand, has been investigated extensively both theoretically (Katz 1984; Moorthy 1984; Oren, Smith, and Wilson 1984) and empirically (Kumar and Leone 1988; Moriarty 1985). Much of this work confirmed the benefits of variety and supported, for instance, the conventional wisdom of supermarket managers that “more is better” (Boatwright and Nunes, 2001). However, the growth of new item introductions in the 1990s, led to a saturation of some assortments (Dreze, Hoch and Purk, 1994), thus prompting research into item reduction. Surprisingly, it was found that simplifying choice could increase sales. Consumers welcomed the “elimination of clutter brought on by the reduction in redundant items” (Boatwright and Nunes, 2001, p. 50). Dhar, Hoch and Kumar (2001), for instance, showed that reductions in the breadth and depth of a category assortment are less noticeable to consumers in staple categories.

Furthermore, Van Ketel et al. (2003) identified that there is a point of optimal variety in an assortment whereby assortment attractiveness is maximised; this being the rationale behind category management. Thus consumers' *perceived* variety of an assortment has been found to be more important in influencing their satisfaction and store choice (Broniarczyk *et al.,* 1998). Indeed, it is recently suggested by Morales et al (2005) that the retailer's organisation of assortment (i.e. external layout) and the degree of congruency with the consumers' internal schema can lead to increased perceptions of variety.

A third body of assortment-focused research may be grouped under the general heading of consumer and demand related. Various efforts have been made to understand consumer perceptions of assortment size (Handelsman and Munson, 1985) and to model consumer utility from the assortment (Baumol and Ide, 1956). A stream of research is emerging relating to the role that assortments play in influencing shopper wants and preferences (Simonson, 1999; Lee and Steckel 1999; Huffman and Kahn, 1998; Stassen, Mittelstaedt and Mittelstaedt 1999; Lesczye and Timmermans 2001). Simonson, (1999), for instance, provides a theoretical framework for understanding the effect of assortments on shopper preferences. Empirical work in the area includes Lee and Steckel, (1999) who study how consumer preferences influence choice within assortment.

Noticeably, all of the previously discussed research is still firmly embedded at the item level and thus within the "category assortment". While the customer's purchase decision is made at this assortment level, it is not made in isolation. Furthermore, as the product variable of the marketing mix, assortment has to be consistent with the other mix variables of price, promotion and visual merchandising to achieve a congruent image. Yet research into the linkages between assortment and other retail mix variables is somewhat fragmented. Notably this includes McIntyre and Miller (1999); Lal and Matutes (1994); Bawa, Landwehr, and Krishna (1989) and more recently, Lesczye and Timmermans' (2001) study which examines the impact of pricing, promotions, service, and assortment on the choice of shopping strategy adopted by consumers. The emergence of category management has expanded assortment research onto the category level. For instance, the study of Basuroy, Mantrala, and Walters (2001) demonstrates how in the case of one retailer the adoption of category management increased the average unit price of the category and reduced its sales volume and revenues. Dhar, Hoch, and Kumar (2001) demonstrate the role played by the category in the store's overall portfolio. And, Campo et al's study (2000) demonstrates the differential impact of location characteristics on categories' attractiveness.

Given retailers' increasing propensity to manage assortments by category, it is surprising that little attention has been given to how space should be allocated between product categories (or departments). Corstjens and Doyle (1981) recognised the need to consider groups of products rather than individual products but with no guidance how this might be achieved. An exception to this is the study by Rinne, Geurts, and Kelly (1987) who addressed the question of space allocations to departments in a department store setting by proposing “a linear programming routine which maximises the total gross profit margin for the store on a monthly basis” (Rinne, Geurts and Kelly 1987, p.31).

In summarising the assortment research in relation to the redefined macro / micro levels of assortment, studies may be further divided into an operational or strategic role. While the literature explores both areas, there is a noticeable lack of empirical and theoretical support for the strategic role of assortment. The majority of assortment research being concerned with operational decisions and the achievement of short-term objectives, such as improving operating results (McIntyre and Miller 1999; Urban 1999), influencing purchase behaviour (Broniarczyk, Hoyer and McAlister 1998; Simonson 1999), and measuring performance (Grewal, Levy, Mehrotra and Sharma, 1999). The operational focus is also noted from the practitioner’s point of view, as Blackwell and Talarzyk (1983, p.8) suggest: “implementation of the marketing concept appear(s) to be mostly at the firm’s operational rather than strategic levels”.

Figure 9 Assortment level research matrix

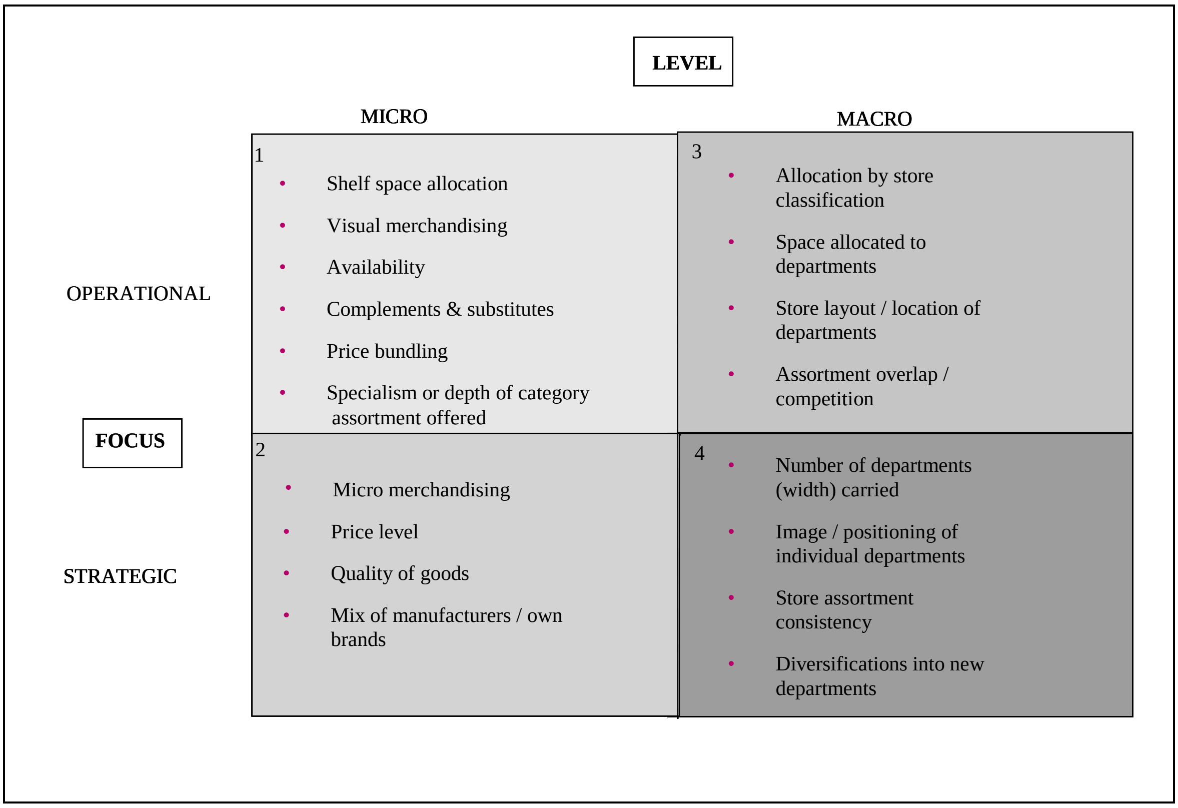


Figure 9 shows an 'Assortment Level Research Matrix', which has been compiled by combining the two predominant areas of assortment literature focus with the proposed levels of assortment. The Micro-Operational and Micro-Strategic quadrants are by far the most widely empirically tested areas of the assortment literature; they are also the themes, which receive the most attention from a practitioners' viewpoint. Clearly the micro (product-unit) focus of the left-hand side of the matrix, holds the most interest for researchers, as only a handful of papers acknowledge the existence and importance of the macro-level of assortment (Hart 1999; Hart & Davies 1996; Cadeaux 1997 & 1992; Stewart and Hood 1983; McGoldrick 1979; Cardozo 1974-75). Indeed, few have focused on assortment movement except for Hart (1999), Sparks (2001) and Simova et al (2003). The latter for example, examined the number of stores selling clothing, accessories and mixed merchandise over a six-year period in the Czech Republic. None of the previous streams of research including portfolio analysis, or category management (Dhar, Hoch and Kumar, 2001) address the "complex problem of assortment creation and modification within the marketing system" (Betancourt and Gautschi, 1990, p.147). Surprisingly, strategic assortment dimensions such as width and the issue of which categories to stock (and their associated impact on store image), have attracted scant research attention (Hart, 1999). As Cadeaux (1992) highlights, “analysts have looked at factors that influence the probability of new product acceptance by retailers, but they conduct that analysis for isolated products rather than for entire product lines”. This could be due to the fact that “there is little basis for predicting what new products could be sold successfully with old assortments”, with decisions still being based on merchants’ intuition (Balderston, 1956, p. 178). However, the aforementioned wheel of retailing (McNair, 1958) accordion theories (Hollander, 1966) and retail life cycle (Davidson, Bates and Bass, 1976) implicitly suggest the strategic use of assortments in repositioning stores over time.

Discussion and Directions for Future Research

This paper sought to review, understand and clarify the definition and meaning of assortment. In the process, the literature illustrated some ambiguity via the inconsistent use and interpretation of assortment, offering limited guidance for the future use of assortment terminology. Thus, an initial contribution of the paper is to define assortment, its composition and the dimensions by which it may be described. In so doing, it has become clear that a fourth dimension, consistency, has been neglected in the literature. Arguably, the need for consistency relates to the assortment’s role as a key store image / patronage attribute, with the image that customers hold of a retail store dictating the scope of assortment consistency. The consistency dimension thus potentially offers an important indicator of a retailer’s ability to successfully match their assortments with the target consumer. To date, little attempt has been made to develop a means of measuring this dimension. The need to measure assortment consistency is similar to that of measuring store image. “If it cannot be measured, it cannot be managed” (Samli, 1998, p. 207). If retailers wish to introduce a new department or category, following trial and error process, their key measures of success will be sales / profit performance. However, these quantitative measures fail to identify whether, and to what extent the new department is perceived by consumers to be consistent with the existing offer.

Another reason attributed to the hitherto failure to define assortment is the lack of a transferable term of measurement to describe the scope of an assortment "without being compared to another assortment" (Kunz and Rupe, 1999). The predominantly quantitative approach to measuring assortment performance highlights a lack of subtlety in measurement. Retailers generally measure the scope of merchandise assortment in stock keeping units or SKUs (Ghosh, 1990, p. 325). This somewhat blunt tool fails to distinguish between the different levels or dimensions in which these items are managed. Furthermore, it ignores the consumer's view of groups of related products, or categories. Admittedly, at the macro level, the dynamic nature of the assortment has so far rendered measurement difficult beyond aggregate terms of percentage change (Bucklin, 1983; Hart, 1999). However, it is argued that a more sensitive form of assortment measurement is warranted.

In evaluating and categorising previous assortment research, it is noticeable that the majority of assortment research exists at the micro, individual item level of assortment. Furthermore, there is a clear emphasis on operational rather than strategically focused assortment research. That this macro-level of assortment in a strategic role has been overlooked within the empirical research is surprising, considering the role that assortment plays within the retail mix. Moreover, given assortment's role in store image, the link between assortment and image has yet to be conceptualised. There is a lack of empirical investigations into how assortment decisions are made and can be used positively to affect a retailer's image and thus positioning. If assortment is viewed as the product element of the retail mix, there appears to be limited understanding of its interaction / relationship with other mix elements (or atmospherics etc.) as a positioning tool. As merchandise scrambling continues apace, with the potential threat of assortment saturation (Hart, 1999), it is suggested that the macro issue of store assortment width warrants greater attention. We therefore urge greater research attention into the fourth quadrant of Figure 9.

Fundamentally, the importance of standardising assortment terminology, similar to that proposed in this paper, provides the first step towards systematically assessing and quantifying the dimensions of assortment. Subsequent research may then progress to developing and testing specific measures for each dimension of assortment. Currently, retailers omit to conduct image research at the category assortment level. In the future, an ability to measure the consistency of an assortment over time, to check the congruency of a new addition with an existing assortment, might better equip retailers to design, control and manage assortments more effectively. Additionally, more research using the category management perspective is required in this area, particularly given the retailers' increasing propensity to manage assortments by category.

Finally, the implications of the Internet for assortment strategy cannot be ignored. Achieving significant differentiation via assortments is likely to become extremely difficult, given that there are no physical limits on merchandise offered for on-line retailers. For instance, for the average book buyer, it is very hard to find any meaningful differences between the selection of books offered by *Amazon.com* and *Barnes & Noble.com*. However, as previously discussed, high variety can lead to negative evaluations of assortments due to frustration caused by informational complexity and the difficulty of evaluating numerous choices. Limiting the extent of relevant information, however, may reduce the perceived complexity of a choice set (Huffman and Kahn, 1998). In the Internet context, this may be achieved by providing an electronic shopping assistant /agent, tailoring or making buying recommendations based on the customer's buying history or other information provided by the customer (Alba et al. 1997). The store-based retailers, on the other hand need to focus on merchandise that has important experiential attributes and take advantage of their ability to provide information tailored to the needs of customers. Improving experiential aspects of store visits normally involves improving the store atmospherics and merchandise presentation but increasingly the entertainment value of shopping is being recognised. Niketown, and most shopping malls provide a good illustration of this trend (Alba et al, 1997).

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An Exploratory Study of the Consumer Decision Process for Intimate Apparel

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Abstract

In contrast to outer apparel, academic research has neglected consumer behaviour for intimate apparel or lingerie. It is argued that within this category the bra deserves singular research attention. This paper presents the results of exploratory research designed to explore in-depth the bra consumer decision process. The key findings indicate a highly-involved consumer who is motivated by a complex range of interlinked factors, and a consumer who desires to be brand loyal in order to enjoy a less extensive decision process but who is prevented from doing so by high levels of perceived risk and 'obstructive' marketing. The authors offer directions for future empirical research based on the consumer behavioural constructs of involvement, perceived risk and the self-concept. Implications for marketing management are also discussed.

Keywords: Consumer behaviour, intimate apparel, involvement, self-concept.

Paper 5. An Exploratory Study of the Consumer Decision Process for Intimate Apparel

Introduction

As a product category, apparel or clothing is regarded as a complex consumer product (Mitchell 1999). Apparel has therefore been a popular choice for studies of consumer behaviour, particularly in relation to perceived risk (e.g., Dowling and Staelin 1994; Jasper and Ouellette 1994) and involvement (Laurent and Kapferer 1985). In contrast to outer apparel, however, very little is understood about consumer behaviour for the essentially invisible and highly personal category of intimate apparel. Within this category the bra deserves singular research attention. The complex physical nature of the bra together with the unique physiological make-up of each bra wearer combine to suggest that consumer behaviour for bras will be different to that for other apparel. In terms of physiology, women's breasts are not symmetrical, and no two female shapes are the same. To compound the physiological problems, lifecycle stages affect breast shape, and child bearing, menopause and hormones all conspire to change breast mass (Goldsberry et al. 1996). To meet such variation in physiological size and shape the bra manufacturer grades up to 60-plus commercial sizes across a wide range of differently 'engineered' bra styles. No other garment, not even the apparently complex footwear category, presents such an extreme marketing problem. However, in the scant literature that exists it is argued that buyer behaviour is influenced by more than the physiological. Examination of this literature reveals a complex set of physiological, psychographic, functional, psychological, psychosocial, and economic factors (Richards and Sturman 1977; Laurent and Kapferer 1985; Ashizawa et al 1990; Mintel 1996; Koff and Benavage 1998; Yalom 1998).

This list of diverse influencing factors supports the assertion that consumer behaviour for bras will be different to that for all other types of apparel. However, as little empirical evidence exists to clarify how women approach the process of buying a bra, manufacturers and retailers acknowledge that greater insights would significantly aid their ability to provide marketing solutions to a market currently estimated at £574m (Mintel, 1997). The present study therefore provides a vital link between theory and practice via a qualitative study of bra consumers. The study was commissioned by an international bra brand and represents a critical first stage piece of research for their distributive retail partner, a leading UK retailer. As an exploratory study it is designed to provide insights into the bra buying process, to identify opportunities for further consumer behaviour research, and to offer recommendations for marketing management.

In the section that follows, the academic basis of the study is presented together with the study's research objectives. The second section discusses methodological issues relating to data collection and analysis, and section three presents a consideration of the research's key findings. Concluding the paper, section four puts forward suggestions for future research and there is a discussion of the research's managerial implications.

Background and Research Objectives

The only extant empirical study to focus exclusively on consumer behaviour for bras is Richards and Sturman's (1985) research on how consumer lifestyle can usefully act as a basis for segmenting the bra market. Correspondingly these authors identify the five segments as the "conservative consumer", the "fashionable consumer", the "brand conscious consumer", the "outgoing consumer" and the "home/price oriented consumer". However, while this research reveals important information about how consumer life-values and attitudes affect the bra decision process, this paper does not suggest that the bra is any different to any other item of fashion apparel. Examination of the remaining non-empirical literature on the bra indicates that this garment delivers a unique set of benefits and challenges to consumer and marketer alike, and it is therefore the contention of this paper that the bra warrants its own research agenda. The bra as a harness performs the important function of breast support to a vast range of physiological shapes, sizes and tissue density/elasticity (Farrell-Beck et al 1998). Whether for everyday, sporting or special occasion use, a bra affects the perceived comfort, contour, posture, breast health, and physical performance of the wearer (Ashizawa et al. 1990; Mintel 1996; Yalom 1998). Fit and comfort are therefore deemed critical (Mintel 1997). It is therefore significant to note the anecdotal evidence that women's knowledge of bra fit and function is low, and that reportedly 70% of women in the UK wear the incorrect size of bra (Farrer 1998). At a psychosocial level, in spite of their ostensibly invisible nature as underwear, "Bras, by their very design alter the shape of breasts for fashion" (Singer and Grismaijer, 1995). Thus the external social identity (Feinberg et al 1992) achieved from the bra is derived from a self-imposed shape and size. Koff and Benavage (1998) found how "Lower self-esteem was associated with lower breast size satisfaction…while high public self-consciousness, social anxiety, and appearance preoccupation were associated with a mismatch between ideal and perceived size". As the supported breast presents a visible contoured cue to the world, it is intrinsically linked with a woman's sexuality, body-image and social image. Finally, then, from a psychological standpoint bra styling may affect the wearer's self-esteem via the self-image achieved from the type of bra worn (Ostergaard 1999; Shim and Bickle 1994).

Against this background it is therefore surprising that the subject of bra buying has received only scant attention. Aside from the Richards and Sturman (1977) bra-focused study of lifestyle segmentation, a later study by Laurent and Kapferer (1985) examines the concept of involvement across a whole range of product categories, including the bra, and concludes that the bra consumer is highly involved with the bra as a product. Finding only these two papers with a focus on bra buyer behaviour, a wider literature search at the more general level of apparel research identified the importance of the self-concept construct for understanding and explaining the apparel consumer's behaviour. The implications for the bra decision process of previous research on both of these constructs - involvement and self-concept - are discussed below. However, from the point of view of understanding the total bra buyer decision process, to date no studies have been undertaken. This research is designed to bridge this gap.

Engel and Blackwell (1982, p.22-23) highlight the benefits of using a model of consumer behaviour as a "frame of reference" for research: a way of specifying "the underlying variables, the nature of the relationships between them, and the manner in which behaviour is shaped and affected". As previous research

(Laurent and Kapferer 1985) established a high-involvement process for the bra, it is considered appropriate to use the Engel Kollat and Blackwell (EKB) model of high involvement decision process behaviour (Engel and Blackwell 1982) as the framework for the study. However, it is the EKB model's central five-stage decision process framework (derived from the original Engel et al (1968) model) that is used to structure this exploratory research agenda. Consideration of any relevant "input" factors, facets of "information processing", and "decision process variables" from the more comprehensive EKB model are then explored within the context of this central five-stage framework. Involvement and self-concept are both considered as variables that mediate consumption behaviours (Engel et al 1993; Broderick et al 1998). As such, and in line with the proposed application of the EKB model (Engel et al 1982), this exploratory study considers the impact of both of these variables on the respective phases of the bra buying process.

In their study of involvement across a range of product categories, Laurent and Kapferer (1985) found that bras have a high product category involvement profile. Thus bras are seen by the consumer to have:

- personal relevance and, based on the probability and consequences of a mis-purchase, associated high levels of risk;
- high pleasure value; and
- based on the product's strong link with self-concept/personality (Laaksonen 1994), high symbolic value.

Laurent and Kapferer (1985) incorporated the bra and the dress as the two items of apparel in their study across a wide range of product categories, and it is interesting to note the comparative findings for these two products. Both were found to have a high-involvement profile and both scored high averages on all facets of the profile. However, while both product categories scored similar high averages on perceived risk factors, the key difference was the bra's relatively lower scores on "pleasure value" and "sign (symbolic) value". From the point of view of understanding the bra consumer, the Laurent and Kapferer study does not explain the respective involvement scores. The findings indicate neither why the bra is seen as a high-risk purchase, nor why when compared with the dress it is perceived to offer relatively lower pleasure value and fewer clues to the consumer's self-image.

Self-concept represents the "symbolic" component of the Laurent and Kapferer's (1985) involvement profile. Self-concept is relevant to the study of consumer behaviour because self-perceptions and the image an individual has of himself/herself directly motivate consumption behaviour (Grubb and Stern 1971; Malhotra, 1988; Heath and Scott 1998). Laurent and Kapferer (1985), for example, found how the product category's "symbolic value" predicted the extent to which consumers would actively seek information about the product. Although no research to date has focused exclusively on self-concept in relation to the bra, the concept has been used as an explanatory and/or predictive variable in previous clothing research (e.g., Ericksen and Sirgy 1992; Feinberg et al 1992; Goldsmith et al. 1996). Findings from these studies indicate that as people seek to reflect a certain self-image through the clothes they buy and wear, so the clothing they wear is closely linked to their self-concept (Kaiser 1990). However, these efforts to understand and explain the self-concept in relation to clothing have focused on outerwear, a category that is characterised by its "visibility" and "public display" (Goldsmith et al. 1996; Feinberg et al 1992). This information can usefully be supplemented by the study of the self-concept in relation to the essentially invisible clothing category of underwear/intimate apparel.

To summarise, the aim of this research is to investigate consumer behaviour for bras using the Engel et al (1968, 1982) five-stage decision process model. More specifically, the objective is to explore consumer behaviour for bras on the basis of both the decision process and the inputs to, and the outcomes from, that process. Explicating the bra's high involvement profile (Laurent and Kapferer, 1985) constitutes the second key objective. Accordingly the aim is to explore not only how the facets of the construct appear relevant to the bra buyer decision process but also the reasons and background underlying the bra involvement profile. Finally, in exploring the bra decision process the study seeks to identify how, and which component(s) of the self-concept, appear to impact that process. For the academic, insights gained from this exploratory study will guide future empirical investigation and from a practitioner perspective, the information and intelligence so gained will support marketing managers in their endeavours to more accurately segment the bra market, to manage a more effective marketing mix, and to better predict future bra buying behaviour.

Methodology

The lack of published research in the area of bra buyer behaviour and the corresponding lack of detailed knowledge required about the bra consumer, her motivations, values, attitudes, behaviour and bra usage prompted the development of an exploratory research design for this present study (Churchill 1995). Furthermore, an exploratory approach supports the development of rich preliminary insights of the broader issues and influences concerning bra purchasing (Miles and Huberman 1994, p.10). Goldman (1962) has suggested that the social interaction experienced within a group setting further supports the delivery of rich research insights. In addition, and of particular significance, it is suggested that the focus group allows a “spontaneity of discussion and the disclosure of attitudes, opinions and information on present or prospective buying and use behavior” (Green, Tull and Albaum 1988). Focus groups were therefore selected as the appropriate method of data collection. However, it is important to acknowledge how the increased social interaction of focus groups also implies “that informant reaction may be influenced and modified” by the presence of peer members (DeLorme and Reid 1999). Considering the sensitive and personal nature of the research this may suggest that some respondents in a group situation may be reluctant to divulge their attitudes and behaviour towards intimate apparel purchasing. Thus to elicit their underlying motivations, a more discreet research approach is required. Multiple methods of data collection were combined into a three-stage research design. The use of combined methods has been found to deliver synergistic outcomes (DeLorme and Reid 1999), including both richer data (Fontana and Frey 1994) and triangulation of data (Denzin 1978). Therefore their use also supports the key objective of gaining an holistic and in-depth view of bra buyer behaviour.

The three stages utilised, respectively, projective techniques, open discussion and a blind test experiment. The first part of the session, a word association exercise, was designed to reveal the respondents' individual perceptions of the leading bra brands. To counter the risk of 'peer contamination' or social influence individual perceptions were captured on paper prior to the general group discussion. Respondents described eight different bra brands using a pre-tested list of forty positively and negatively affective descriptors. This "controlled response" process (Chisnall 1992, p.162) lasted approximately ten minutes. The second part of the instrument involved a semi-structured open discussion designed to explore in-depth the bra decision-making process, and to elicit the relevance of any facets relating to the involvement and self-concept constructs. Engel et al's (1968, 1982) basic five-stage buyer decision process model outlined above provided a structure for the discussion. Previous research has identified comfort and fit as key criteria in selecting a bra (Mintel 1997). Exactly how consumers evaluate specific bras across these dimensions is not known. The third part of the research instrument therefore incorporated a *blind test* experiment using actual garments. Seven designs of medium control bra brands were selected to represent a broad range of current bra styles. Correspondingly, the twin aims of this stage were to prompt individual feedback on product evaluation and design preferences, and to stimulate open discussion. Central to the latter stage was the use of the third person technique (Haire 1950), used here to explore the congruence of each bra/ brand with respondent self-image.

The focus groups were selected purposively "to include persons who have a common background or similar buying or use experience that relates to the problem to be researched" (Green, Tull and Albaum 1988). The sampling criteria were limited to four key variables: age, bust size, socio-economic group and geographic location. To facilitate future comparisons across these variables a stratified sample was designed to include six focus groups, and with the use of a recruiting questionnaire, Market Research Society-trained interviewers recruited forty-eight respondents to participate. The study targeted the middle range of 35-64 years, a group that would have established their bra buying experience, attitudes and beliefs. Representing approximately 37 per cent of the UK female population (Mintel 1996), this age range would also include women in the "family lifestage", who had physically achieved "breast maturity" (Singer and Grismaijer

1995). To ensure representative distribution across age segments, the age range was subdivided into three groups: 35-44, 45-54 and 55-64 years with eight respondents recruited to each group. To reflect the majority distribution of bra sizes in the population, respondents were recruited from the ‘medium control’ segment that covers “average” to “fuller busted” sizes. Finally, in order to reduce the potential for sample bias or “sloppy sampling” (Sudman and Blair 1999), the focus groups were recruited and conducted in three separate locations within the Midlands and the South East of England.

An independent Market Research Society moderator, selected for compatibility with the respondents, directed the focus groups. The eight focus groups lasted on average ninety minutes. All were audio-taped and four were also video-taped. The tapes were then transcribed and content analysed to determine common themes and possible interrelationships.

Results and Discussion

The findings of this exploratory study are structured in line with the five buying decision process stages of the Engel et al (1968, 1982) framework.

Problem Recognition

Existing literature, summarised above, contends that the bra buyer is influenced by a complex set of physiological, functional and psychological motivating factors. In terms of problem recognition, the majority of the respondents described how they are initially prompted into the bra buying process by situational factors. These included the garment’s loss of functional support through deterioration of elasticity; the decline in a bra’s aesthetic appearance; the seasonal factor of holidays prompting product replacement, and a change in the wearer’s own physiology driving the need for a different bra size. For some, the prompt to purchase is linked to the hedonic value (Laurent and Kapferer 1985) of *“pretty”* bras; in other words, the way in which *“pretty”* bras are associated with *"pleasing someone else*", and the wearing of them seen as a treat or reward: *"It makes you feel special really, spoiling yourself".*

Information Search

Consistent with the behavioural implications of the high involvement profile for bras first uncovered by Laurent and Kapferer (1985), the information search for bras was described in this present study as both critical and extensive. Considering the consumer's wide experience of the product and the frequency with which bras are replaced in her wardrobe, it is surprising that women find it necessary to undertake an extensive search for each new bra purchase. This may be attributed to the reported lack of style/size continuity driving the need for consumers to restart the search process for each new bra purchase. Indeed, the actual process of shopping for a bra was felt to be a positive, enjoyable experience for only a third of the respondents, compared with the remainder who found the experience *"a nightmare", "frustrating", "boring", "a necessary evil", "traumatic".* The strongest reason for not enjoying the experience was the lack of attractive bras in larger sizes, lack of choice in general, the difficulties encountered in finding bras that offer fit, comfort and the right body shape through clothes. Further analysis revealed that the experience was considered enjoyable when certain conditions held. Key among this list of contingent factors were:

- when the respondent found a suitable bra and could return to buy a similar one or repeat purchase;
- when they had *"lots of money to spend";*
- if they were a standard size, thus accessing more choice;
- if shopping for a bra to complement a special outfit or occasion.

The high involvement profile for bras (Laurent and Kapferer 1985) also reflects high levels of risk. These authors found that the extensiveness of the decision process is influenced above all by the consumer's perceived importance of the product and the negative consequences of a mis-purchase, and to a lesser degree by the perceived probability of making a mis-purchase. The risks as described by the respondents in this study are allied to the difficulties that consumers experience in securing a well-fitting and physically comfortable bra. A mis-purchase is only fully confirmed once the garment has been worn and washed, and the consequences of a mis-purchase are that a potentially expensive product may then prove unsuitable and be left to languish 'at the back of a drawer'. In the Laurent and Kapferer (1985) study the second strongest predictor of an extensive decision process was found to be the perceived differences among alternatives. Although the respondents in this study did not refer to a number of highly differentiated brands, they did cite that an additional factor underlining the risk associated with bra purchase was the lack of consistency or variation in sizes across different brands and even *within* the same style from one manufacturer. To further compound the problem, when the consumer has found a bra that meets her requirements there is the significant risk that the manufacturer will discontinue the particular style.

As a variation of high-involvement decision process behaviour, Engel and Blackwell (1982) introduce the idea of "routine decision making based on high involvement" (p.33). When satisfaction from product use reinforces future buying intentions, the decision process will be much simpler. In this situation, problem recognition is followed by an internal search that immediately reveals a well-formed purchase intention. This intent then leads directly to a purchase outcome. Under these conditions high brand loyalty develops and is further reinforced by continued satisfaction. However, the respondents in this study reported that the discontinuation of styles and changes in bra brand fit and/or quality are major obstacles to brand loyalty.

The respondents' express desire was for a far less extensive decision process, particularly for those bras that they want to repeat purchase. Bra consumers want to be brand loyal. Yet as a consequence of the perceived risk factors the consumer admits a tendency to style- and store- rather than brand-loyalty. They will patronise those stores that offer depth of range, size availability and specialist advice. With respect to this last factor - specialist advice - an important theme to emerge from nearly half of the respondents was the need to be correctly measured and fitted for a bra. As many respondents admitted to not knowing their correct size, they relied on “a little bit of trial and error” and were therefore unsuccessful in self-selecting appropriate styles. One-fifth of respondents reported disillusionment caused by being incorrectly measured in the past, with a noted difference between sizes recommended by different retailers. Once again this increases the perceived risk associated with the probability of a mis-purchase. The perceived variation in fitting and measuring services, combined with the inherent size variation between manufacturers and even within the same brand, present substantial obstacles to the bra buyer. Seeking to overcome such barriers to successful purchase, over a third of respondents underlined the importance of the type of in-store advice associated with the specialist lingerie retailer as opposed to generalist department store.

It is significant that the majority of women preferred to shop alone for bras, unlike the preferred social interaction associated with fashion apparel, where “the customers comparison to referent others appears to be of paramount importance” (Dodd et al 1998). This finding supports the highly personal nature of the bra, and reinforces the need to examine the consumer behavioural differences between outer- and intimate- apparel.

Pre-purchase Evaluation

In terms of the evaluation stage of the buyer decision process, the results indicate a two-stage process, with a third and final evaluation taking place post-purchase. Stage one involves the consumer’s appraisal of the bra’s appearance. It is notable that the respondents could determine the finished shape defined by a bra from a number of physical styling cues. They could evaluate an evoked set of bras for potential fit and comfort without trying on the garment. This status had been achieved as a result of past buyer behaviour experience and, as an input variable to the consumer evaluation process, represents a particularly important consideration in a self-service retail environment. The decision rules adopted by bra buyers are based on product attributes comprising the cut/shape of the bra, whether under-wired or non-wired, type of fabric, seam positioning and components. These attributes combine to form an holistic impression of the final breast shape and contour visible through outer clothing. The fact that the consumer is motivated to consider her social image is clear evidence of a link between the bra and self-image, and underlines the importance of self-concept as a factor that impacts the consumer decision process for bras. For this first stage visual-evaluation, it is also important to observe that the consumer has a well-developed understanding of bra brand images and positioning. In analysing the word association exercise it became apparent that the respondents also held strong attitudes towards the main bra brands. As a result, bra buyers were very clear about the positioning of competing brands in terms of image, perceived price, quality and probability of good-fit.

Ericksen and Sirgy (1992) concluded that self-congruity (the extent to which a product image matches a consumer's actual self-image) and ideal-congruity (the extent to which the product image matches the ideal self-image) significantly predict the outer apparel preference of women. For the purpose of this present study on intimate apparel, a category that spans the utilitarian and the more 'frivolous'/special occasion, it is significant to note how this previous research found 'ideal' self-image somewhat more important than 'actual' self-image for the "feminine" (as opposed to business-like) outerwear costume. For the purposes of the present study, it is the number of bra types or bra wardrobes adopted by a wearer that represents perhaps the strongest indication of the self-concept as a mediating factor in the bra decision process. Even where there was a preference for only one "universal" bra type, the respondent claimed that older, more comfortable bras were worn in the day whilst new ones were reserved for evening. There appears to be a clear distinction between older bras feeling more comfortable and thus suitable for home, while socially - and therefore possibly related more to either social- or ideal-self concepts than to actual-self concept - these were perceived to provide neither sufficient support nor the most appropriate external shape: *"You wear your clothes for comfort every day. Whereas when you go out at night you tend to wear something that's perhaps not as comfortable; like, we all squeeze ourselves into high heel shoes because they look good".* The fact that women will suffer the pain of an uncomfortable bra in order to preserve a particular contour and shape through clothing signifies that bras are indeed related to self-image or self-concept.

In addition to affecting product/brand choice, however, self-concept may influence how consumers view advertising, store image and salespeople, and the ways they interact with these stimuli (Onkvisit and Shaw 1987). An understanding of the self-concept's influence on behaviour can therefore enable marketers to develop effective marketing mix programmes; an aid to ensuring congruity between the relevant elements of the marketing mix and the kind of self-concept desired by the consumer (Onkvisit and Shaw 1987). In terms of store choice for bras, the respondents in the present study appear to seek congruence between their own profile/image and that of in-store sales staff. This finding is also consistent with store image theory (Martineau 1958) where sales staff are seen as a key part of the service proposition. Store choice also appears to be affected by the presence and associated image of co-consumers. Older respondents reported that the close proximity of women from younger, slimmer segments could be obstructive to their bra purchasing.

An assessment of how well a bra fits takes place at the second stage of the evaluation process. This involves the trying on of bras from a smaller evoked set and takes place either within in-store fitting rooms or, due to time constraints and the desire for privacy, at home. If this process is undertaken in store, sales staff can exert a credible influence on the consumer and her decision process (Baron et al. 1995), particularly given the reported difficulties that bra buyers encounter in both establishing their correct size and finding suitable styles and sizes.

Purchase and Post-purchase Behaviour

On average and depending on the quality of the bras and how long they lasted, the respondents in this study claimed to buy a bra three to four times a year. Further, to counter the risk of obsolescence consumers tend to buy in bulk when the product *is* available. Availability of the chosen bra style is one of the key factors influencing purchase. Given the importance of comfort and fit, substitution is rarely an option in bra purchasing. Owing to the previously mentioned problems of limited availability of styles and sizes and manufacturer-generated product obsolescence, the majority of the women categorised themselves as convenience shoppers: *“If I see a nice one I think, ‘there’s my size, I’ll buy it’, not because I really need it. It saves me when I do need one having to go and hunt for one”*. In this way purchase is prompted by the marketing stimulus of an in-stock situation, and underlines how practitioners can stimulate purchase just by having an item available.

In terms of number of bra purchases, the majority of the women bought at least two bras at a time, though it is notable that some respondents claimed they bought three or more at once. An alternative approach was to buy one bra, try it on at home, wear it and wash it, then return to buy another exactly the same or in a variety of colours. This propensity to repeat purchase and to possess multiple copies of the same garment is unique to the bra, and it further underlines the way in which the consumer is motivated first and foremost by functionality and physiology. The strategy to return to repeat purchase is preferred in cases where disposable income limited but, importantly, is due to the strong belief that a bra cannot be judged for comfort and fit until it has been worn and washed. This further underlines the perceived risk associated with bra buying. The consequences of mis-purchase relate not only to the key objective to secure a well-fitting and comfortable bra that provides the desired contour and supports the target self-concept, but also to the need to avoid financial loss. After washing, the bra cannot generally be returned for reasons of poor fit and will be rendered useless. In order to reduce these high levels of consumer perceived risk, it is important for retail sales personnel to be cognisant of this third post-purchase stage of product evaluation, and their company's selling and warranty policies designed, where possible, to give assurances of quality and problem rectification.

Conclusions, Future Research and Managerial Implications

The insights gained from this in-depth investigation support the hypothesis that consumer behaviour research should not treat the bra as just another item of apparel. The bra buyer is motivated by a complex array of interlinked factors – functional, physiological, psychological, psychosocial and economic. The key contribution the research makes to existing findings is in explicating the individual facets of Laurent and Kapferer's (1985) high involvement profile and in revealing the mechanics of the extensive bra decision process. In terms of the risk facet for example, this study represents a first step in conceptualising risk based on the bra consumer's key motivations. Future research could use this information to produce better measures of the different types of risk, thus facilitating more effective segmentation based on risk perception analysis and consumer risk-reducing strategy (Mitchell 1999).

High levels of consumer involvement and an associated extended problem solving process support the usefulness of the EKB (Engel et al 1968, 1982) high involvement decision process model for investigating consumer bra behaviour. However, manufacturers' and retailers' efforts to market the bra as a fashion item deny the consumer her desire for more "routine" decision-making (Engel and Blackwell, 1982, p.33) based on brand loyalty. It would appear that conventional theory for high involvement goods does not apply, and that the differentiating factor appears to be the frequency with which this high-involvement product is re-purchased. For this type of product, manufacturers and retailers cannot afford to subject the consumer to risk each time they approach the decision process. In this situation, too much innovation will be counterproductive to customer retention. Successful new product strategy must therefore be based on a sound knowledge of consumer perceived risk. Whether this apparent link between loyalty and obsolescence-driven risk holds for all types of bra, and also for other products categories, is a question that future empirical investigation could usefully address.

The difficulties consumers encounter in finding style and size availability and consistency, coupled with their express wish to be brand loyal, underlines the need for the manufacturers to work together and with their retail partners to achieve industry-wide size-standardisation, manufacturing consistency, better forecasting and more reliable in-store measurement systems. Also, in spite of years of experience of bra buying the consumer still needs guidance through the bra decision process. To support successful differentiation therefore, it is recommended that the retailer offers highly-trained bra fitters and sales specialists. It is the authors' contention that if the buying process were facilitated and made more pleasurable, the customer would shop for bras more frequently. This could significantly aid market growth. More regular bra buying would also give the manufacturer and/or retailer the opportunity to establish a closer relationship with the consumer, and correspondingly, to alert consumers to any planned product obsolescence.

Laurent and Kapferer (1985, p. 45) found that the bra as a product class has significant pleasure value. By contrast, and on the basis of the problems associated with purchase, the bra consumer decision process is seen as anything but pleasurable, although it is acknowledged that this research did not discriminate between the utilitarian and the special occasion or more frivolous ends of the style continuum. In developing the involvement profile Laurent and Kapferer (1985) found no association between the perceived risk facet and the facet relating to pleasure. This present study uncovered no substantial evidence relating to the pleasure value of the bra. However, in order to re-validate Laurent and Kapferer's (1985) involvement profile, it would be useful to re-run the original correlation analysis but on the basis of more refined measures of the risk and "hedonic" facets. Finally, future research should seek to explore the proposed link between a pleasurable bra shopping experience and the consumer's propensity to re-engage in that process.

The preliminary findings here on how the buyer's decision is affected by self-image also prompt the need for future research. As an exploratory study into the consumer decision process for bras in general, the differences between purchasing a bra for 'everyday wear' and one for 'special occasions' have been largely overlooked in this study. The former is more of a utilitarian type purchase and is therefore perhaps more consistent with actual self-concept. Arguably the 'special occasion' bra contains the more hedonic, pleasurable, fantasy aspects (Ostergaard 1999) of bra purchasing and may therefore be related more to ideal self-concept. An investigation into which particular component of self-concept (actual or ideal) motivates the bra purchaser, combined with a study of the co-variant effects of consumer demographics and perceived bra brand image, would offer valuable insights into the construct of self-concept in relation to bra buyer behaviour. Any insights gained would be of immense benefit to marketing strategy and implementation: an aid, for example, to segmenting the bra market based on self-concept and beyond this, to more effectively designing products and associated promotional appeals.

This is an exploratory study conducted with a sample of 48 respondents. The next step is therefore to validate the findings using a larger scale survey. Also, in order to confirm whether all sub-groups reflect the same bra motivations and behaviours, future research should replicate the present study with younger and older groups and with the lowest and highest ends of the size scale.

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Category Management: A New Approach for Fashion Marketing?

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Abstract

As a supply chain management initiative category management has to date been the almost exclusive preserve of the grocery sector and within that sector, limited to food categories. This paper proposes that the fashion industry might usefully follow the grocery industry's lead and implement category management. A comprehensive review of the literature on category management highlights the opportunity for fashion marketing to consider the potential of category management, and the specific research gaps. In operationalising the subsequent research objectives, the paper reports the results of exploratory, in-depth consumer research for a particular category of intimate apparel. The managerial implications of these findings are then discussed in the context of the established eight-step category management process. The overall tentative conclusion of this study is that as a consumer-oriented joint planning tool, category management offers retailer-supplier partnerships in the fashion industry an important adjunct to the industry's quick response methods. The paper closes with an agenda for future research.

Keywords: category management, fashion marketing, quick response.

Paper 6. Category Management: A New Approach for Fashion Marketing?

Introduction

Logistics-based Quick Response (QR) partnerships were initiated by the fashion industry in the mid 1980s to maximise logistics efficiencies and costs (e.g., Giunipero *et al.*, 2001). Almost a decade later the QR model was adapted by the USA's grocery sector as Efficient Consumer Response (ECR) (Fiorito *et al*., 1995*;* Kotzab, 1999), and in European grocery markets, category management has been adopted as a "cornerstone" and development of these original ECR initiatives (Gruen and Shah, 2000; Kotzab, 1999). Supplier-retailer partnerships are central to both QR and category management concepts. However, while the efficiency concepts of QR and the USA's ECR practices rely principally on retail sales data, category management uses in-depth information on the consumer to support joint marketing decisions for the category (Johnson, 1999). Furthermore, category management ignores traditional product groupings (e.g., breakfast cereals) and focuses instead on understanding the way consumers shop related products in a category (e.g., all products constituting breakfast) (IGD, 2002; Kotzab, 1999). In essence, category management seeks to complement "supply management" improvements (i.e., improvements in sourcing, purchasing and supply) with "demand management" activities (i.e., managing assortments and the introduction of new products) (Gruen and Shah, 2000). The demand activities themselves are informed by "marketing information" (Hines, 2001, p.23) and are focused on meeting the needs of an increasingly demanding and highly complex consumer (IGD, 1999; Johnson, 1999). Although the supply chain efficiencies and cost savings of QR enhance the retailer-supplier partnership's business performance, it is considered that once these types of cost and efficiency improvements have been made, they merely become "industry norms" (e.g., Johnson, 1999, p.260). By contrast, category management's focus on leveraging consumer understanding to develop category-based consumer "solutions" (Wellman, 1997) offers an opportunity for creating sustainable competitive advantage (Johnson, 1999; Joint Industry Report, 1995). Delivering customer value in this way is totally in line with contemporary views of supply chain management (Hines, 2001).

Category management has enjoyed rapidly growing acceptance and implementation by retailers and suppliers in the grocery sector around the world (Basuroy *et al*., 2001; Dussart, 1998; IGD, 2002). On the basis of its reported positive outcomes, it is not difficult to understand its high adoption rates. Results from a recent survey by the UK's Institute of Grocery Distribution (IGD, 2002) show how the majority of category management practitioners believe that category management improves turnover, profitability, market share, inventory levels, trading relationships, and consumer understanding. Academic empirical research also reports the positive effects of implementing category management. It is found to positively affect retailer prices and profitability (Basuroy *et al*., 2001), and the implementation of category plans is perceived by suppliers to positively affect category performance (Dhar *et al*., 2001). Diffusion of category management to other sectors is now underway (Basuroy *et al*., 2001; Dussart, 1998; IGD, 2002; Kotzab, 1999). However, there is no evidence in the literature or from industry intelligence that the fashion sector has embraced category management. Indeed with regard to the latter, discussions with key informants working in the fashion departments of two of the UK's leading food retailers and in menswear for one of the UK's leading department store chains indicate that as yet no attempt has been made to adopt category management.

The purpose of this study is therefore to explore how category management might be applied to fashion marketing. Specifically, the paper reports the results of an exploratory study that seeks to clarify the role of consumer behaviour research in category management. This is achieved by identifying how the collected consumer intelligence can inform a supplier-retailer's joint category management planning process.

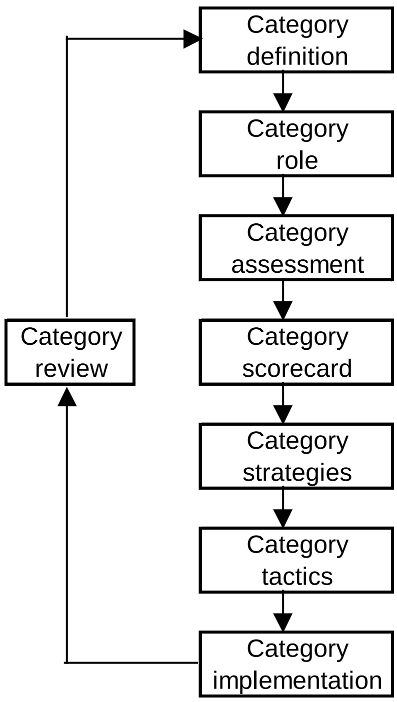
The remainder of this paper is structured as follows. The next section presents a comprehensive review of the extant literature on category management and from this, identifies research opportunities in this area. This section also outlines the grocery industry's established category management process. Building on this review, the second section discusses the data collection and analysis methods used in the present study. This is followed by a presentation of the study's findings. Next, the managerial implications of the findings are discussed via their application to the strategy and tactics planning phases of the category management process. The paper concludes with an agenda for further research in the area.

Literature Review

Introduction

The "consumer-centric" thrust of category management (IGD, 2002; Mathews, 1996; Pearce, 1996) is embraced in the grocery industry's agreed definition of category management as *"the strategic management of product groups through trade partnerships, which aims to maximise sales and profits by satisfying consumer needs"* (IGD, 1999, Appendix). The grocery industry has developed an eight-stage category process to guide suppliers and retailers in their category management efforts, from analysis for the category ("Category Assessment") through to the subsequent joint strategy and tactics planning stages (see *Figure 10)*.

Figure 10 The Category Management Process



Source: Basuroy *et al.*, 2001, p.17; based on Joint Industry Report on Efficient Consumer Response (1995).

By means of this process *"the two sets of knowledge and skills are combined to tailor the category offer to the retail outlet in question and its customers"* (IGD, 2002) and a "category plan" (Gruen and Shah, 2000) is jointly agreed.

Table 13 summarises the extant literature on category management and highlights the key points of evidence, commentary and criticism contained within this literature. This literature on category management is categorised into articles focused on: empirical research; case study-based descriptions; commentaries; and literature-review based descriptions. Category management has received much press, particularly in practitioner publications (see Table 13, Group 3), on specialist industry websites (e.g., www.ecrnet.org) and at industry conferences. As Table 13 shows, there is no shortage of descriptive articles, practice guidelines and commentaries on category management, all of it geared to the grocery industry. However, the empirical evidence that has been collected is somewhat limited, and again, all of this is in the grocery sector (e.g., Basuroy *et al*., 2001; Dhar *et al*, 2001; Gruen and Shah, 2000; Zenor, 1994). The purpose of this literature review is therefore twofold, and the rest of the section is organised under two headings to reflect these twin aims. The first objective is to further develop the argument advanced in the Introduction that fashion marketers should consider the adoption of category management as an extension to their current QR practices, and the second is to highlight research opportunities in the area of category management.

Category Management as the next generation QR

As argued above, category management presents a platform for sustainable competitive advantage based on the ability to market the right products in the right way to meet "the fast changing needs of a highly complex consumer" (Johnson, 1999, p.260). This relies on retailers sharing transaction data and on suppliers sharing the in-depth knowledge of the consumer that might explain such transaction data. It is suggested in the QR literature that the most 'developed' implementation of quick response – Stage 3 QR implementation (QRI) - actually includes category management (Giunipero *et al.*, 2001, p.362; Birtwistle *et al*., 2003). However, the three items used to measure the stage 3 QRI construct

(Giunipero *et al.*, 2001, p.371) - vendors receive sales data, QR team meets with vendors, vendors receive stock-out data - do not reflect the consumer centric thrust of the grocery industry's conceptualisation of category management.

Table 13 Category Management (CM) literature: Theoretical and empirical evidence

Year	Author(s)	Type of Study	Respondents/Sample/ Publication	Main Focus/Evidence/CM Benefits/Drawbacks
Group 1: Empirical Research				
1994	Zenor	Empirical: A simulation	Scanner data applied to a pricing model	Substantial profit benefit to manufacturer from coordinated CM pricing structure, but depends on level of competition between brands. Impact on retailer and competitors depends on market structure factors.
1999	IGD	Empirical: practitioner survey	120 respondents from supplier and retailer organisations	Survey results confirm the benefits of CM. Underlines the cooperative nature of the process. Promotes cross-functional working.
2000	Gruen and Shah	Empirical: Stage 1 qualitative and Stage 2 testing of conceptual framework	Stage: 128 from supplier attendees at 1999 ECR conference and from list of category managers from Food Marketing Institute (FMI) list	Brand management/sales conflict affects performance outcomes.
2001	Basuroy *et al.*	Empirical: Intervention time series analysis of sales data	Aggregate store-level scanner data from 2 retailers – one deploying CM, the other not	For retailer: Increase in retail prices and category profitability where CM implemented and where interbrand competition is high and consumer store switching is low. For manufacturer: Lower prices and margins. This signals the need for the trading partners' co-development of plans if CM is to create a win-win situation. For consumer: increase in retail prices calls into question the consumer benefits of CM.

2001	Dhar *et al.*	Empirical: Regression analysis	Account data for 106 major US grocery retail chains in the 50 Nielsen SCANTRACK markets	The critical drivers of category performance (e.g., promotion, price, etc.) vary depending upon the role that the category plays in the portfolio of the retailer and the consumer (e.g., staple, niche, variety enhancer, etc). Suggests future research should investigate the benefits of CM to manufacturers.
2002	IGD	Empirical: practitioner survey	64 respondents from supplier and retailer organisations	Survey confirms the benefits of CM and its importance as a core business strategy for the next decade. Implementation by retailers is the most critical element that is over-looked.
1998	Broniarczyk *et al.*	Empirical: Experiments looking at the impact of item reduction in a category	Study 1: 212 students on 6 shopping trips Study 2: 229 respondents participate in test store	Number of items stocked might be reduced without consequent negative affect on assortment perceptions and store choice, so long as only low-preference items are eliminated and category space is held constant.

Group 2: Descriptive/Case Study

1996	Pearce	Case study	Manufacturer	Shopper research proved to be the ECR “relationship enabler”.
1998	Johnson and Pinnington	Descriptive/Mini case studies to demonstrate market research techniques for CM	The clients for the commissioned market research forming the mini case studies were suppliers to the retail sector (UK and Greece)	Cites benefits of CM to retailers and suppliers (p.35), and the benefits to both of operating a trusting trading relationship. Concludes with proposal of how CM-related, ad hoc market research gives the supplier something of value to offer the trading relationship.
1998	Qureshi and Baker	Mini case study format to report results of market	A range of in-store market research tools employed with	Reports how the supplier gained invaluable *in-store* consumer insights for the category from the market research; this would complement their knowledge of

		research study	1000+ shoppers	the consumer as a "user" of the products.
1999	Johnson	Descriptive/Mini case studies to demonstrate market research techniques for CM	Examples from various international markets	How ad hoc market research can help CM partners acquire an in-depth understanding of the consumer's shopping motivations/ behaviour. Suppliers benefit from CM when they have agreed with the retailer a "purchase marketing strategy" for the category.
Group 3: Commentary				
1993	Harris and McPartland	Commentary	Practitioner publication	Defines CM, and identifies category expertise as a "shared resource".
1994	Harlow	Commentary	Academic-practitioner journal	Defines CM, describes CM as an evolved form of trade marketing, outlines CM principles and the consequent challenges to companies seeking to implement CM.
1995	Richards	Commentary	Practitioner publication	Argues the potential for supplier lock-out when competitors secure category captainships with retailers.
1996	Mathews	Commentary	Practitioner publication	Reports the results of a survey of retailers and manufacturers. Noted a maturing of the CM process and use of "consumer insight" to find and leverage common ground in the trading relationship.
1997	Freedman *et al.*	Commentary	Consultancy publication	The authors are sceptical that supplier and retailer objectives can ever be aligned, but at this stage (i.e., 1997), "full-blown" CM remains largely untested. US manufacturers underestimate the cost of developing joint category plans; European manufacturers admit to scepticism, with retailer-supplier trust cited as an issue.
1997	George *et al.*	Commentary	Consultancy publication	The authors explain the need for functional "integrators" and describe how, in response to

				increasing consumer and trade customer demands, companies have reorganised their marketing organisations.
1997	Wellman	Commentary	Practitioner publication	CM "baggage" (i.e., the cumbersome 'best practices' templates) makes it unproductive and a barrier to focusing on the consumer. Advocates CM as a "cross-merchandising"/cross-category business model rather than an "organizational business model".
1999	di-Nome	Commentary	Practitioner publication	Differentiation in CM relies on a greater focus on key consumer insights and on category strategy. Retailer-supplier cooperation and trust are essential.
1999	Dewsnap	Commentary	Academic-practitioner journal	Category management is proposed as a "vehicle for integration" between sales and marketing.
2001	Gregory	Commentary	Practitioner publication	Reports the disenchantment with unwieldy CM processes that deliver undifferentiated plans by store. Advocates more shopper insight as the way forward.
2001	Mitchell	Commentary	Practitioner publication	CM described as a severe disappointment with cumbersome manuals and templates. Categories still not being defined by consumer understanding.
2001	Store and Benady	Commentary	Practitioner publication	Criticises one UK retailer's CM attempts as insufficiently consumer-centric and insufficiently radical.
Group 4: Descriptive/Literature Review				
1997	Hutchins	Commentary	Academic journal	Develops a research agenda for academics "with an interest in supply chain management issues".
1998	Dussart	Review	Academic journal	Major pitfall: the consumer does not always benefit from CM. Consumer understanding should be

				centre-stage.
1999	Kotzab	Descriptive	Review based on analysis of secondary statistical data, literature review and expert interviews	Distinguishes between textile industry's Quick Response, and grocery industry's Efficient Consumer Response (ECR) USA and CM-inclusive ECR Europe practices. Discusses ECR background and approaches, and how ECR in USA developed from QR practice in the textile industry. ECR presented a "distribution model" focused not only on "replenishment" but also *"efficient"* promotion, new product introduction and assortment. Reports savings offered by the initiatives.

Group 5: Manuals/Guides

1992	Nielsen			'Category Management: Positioning Your Organization to Win'
1995	Joint Industry Report on ECR			'Category Management Report: Enhancing Consumer Value in the Grocery Industry'
1998	'Category Management: The Guinness Guide'			Guinness GB Take Home Trade
2000	ECR Europe			'The Essential Guide to Day-to-Day CM'

Notwithstanding this conceptual discrepancy, research in the fashion industry reveals that implementation of QR to Stage 3 is woefully low anyway. A study by the consultants, Kurt Salmon Associates (KSA, 1997) found that only 10% of the respondents had implemented this third stage of QR, and a more recent UK study found that despite the intervening years, the figure had only risen to 20 per cent (Birtwistle *et al*., 2003). The impact of QR systems and technologies has been most noticeable on lead-time, inventory reduction and reduced stock-outs (Ko and Kincade, 1997). However, it has been argued that the consequent profit benefits have largely been to the benefit of the retailer, with the suppliers taking on most of the “cost burden” (Hunter and Valentino, 1995; Whiteoak, 1999). Against this background, the notion of retailer-supplier partnerships, and all of the associations of trust, shared information and shared benefits that the word “partnership” conveys, would appear an unrealistic ideal. As Birtwistle *et al.* (2003) report, *“There is still a high level of distrust between supply chain members, which denies one of the fundamental requirements of QR, namely that information should be shared to the benefit of all.”* Such a lack of trust could explain the reported low levels of full-scale QR implementation in the textile and apparel industries (Birtwistle *et al.*, 2003; Lowson, 1998; KSA, 1997), and it is this same lack of trust that could explain why category management, which relies so heavily on partnership ideals, has not yet been adopted. This was underlined as follows in a recent research interview with a senior menswear buyer: *“We are sharing more information but neither party trusts each other.”* Arguably, in order to engage in trading partnerships, retailers and suppliers both have to perceive and/or experience win-win benefits. It is the authors’ contention that the mutual benefits offered by category management partnerships would encourage increased openness between retailers and suppliers.

However, the purpose of this study is not to call into question the value of QR to the fashion industry. Indeed, the aspect of category management that focuses on logistics-based “optimal replenishment” concept (IGD, 2002) reflects its QR origins. Rather, this study investigates how the grocery industry’s established category management concept could act as a useful adjunct to fashion marketing’s QR. This view is predicated on the proposition that efficient replenishment does not guarantee that suppliers and retailers in the fashion industry have *a priori* effectively marketed the right products. Conversely, category management would enable them to introduce the ‘right products’ to the marketplace, to merchandise and promote them in the right way, and *then* to enable their efficient replenishment. In its development of ECR, the grocery industry acknowledged that “supply management” and category management was a powerful combination; specifically, that “to reap the full benefits of ECR” category management should be linked to “supply management” (IGD, 1999, p.13). This paper suggests that the fashion industry should consider doing the same.

Research Opportunities: The importance of consumer intelligence and joint category planning

Johnson (1999) asserts that while electronic point of sale (EPOS) systems provide volume sales data – that is, the “what” of category sales – category management depends on understanding the “why” and “how” of consumer behaviour. These are what the IGD (2002) term “consumer insights”. However, most reports on category management’s shortcomings highlight the grocery industry’s failure to fully deploy the requisite in-depth understanding of the consumer (e.g., Dussart, 1998; Gregory, 2001; Mitchell, 2001; Store and Benady, 2001; Wellman, 1997) and its related failure to “inspire” the consumer with “improved offerings” (Gruen, 2002). A real understanding of the consumer for a particular category would – it is argued – enable supplier and retailers to adopt radical shifts in the marketing of the category. It would enable them to move beyond “improved efficiency to improved consumer experience”, and beyond “single product-based categories to consumer solutions” (Gruen, 2002, p.18). Indeed, research by the IGD indicating that category management has a healthy future in the grocery sector (foods and non-foods) could be an acknowledgement that there is much scope to improve existing category management techniques.

The collection and analysis of consumer “insights” is a critical part of the Stage 3, “Category Assessment” phase of the category planning process (Figure 10)[3]. Johnson (1999) and Qureshi and Baker (1998) argue a strong case for how

[3] The other areas for “assessment” are market, retailer and supplier (IGD, 2002).

a whole range of market research techniques are vital for the collection of the point-of-sale consumer insights and report on market research projects undertaken in the grocery sector to gather insights into the in-store shopping process. To date, however, empirical research has not addressed how consumer insight collected for category management as part of the “category assessment” stage can be applied to the subsequent planning stages of the category management process (the “scorecard”, “strategy” and “tactics” stages in Figure 10). Nor has previous research dealt with how category management can be applied to any non-food, including fashion. This study therefore seeks to fill these research gaps.

Before category management, neither retailer nor supplier possessed in-depth knowledge of the consumer's in-store behaviour. Consumer insight is vital to achieve the aims of category management, but although retailers have access to EPOS data, few have the resources to conduct and/or analyse consumer research at the category level (Johnson, 1999). Potentially the supplier can fill this gap by providing this resource. Although category management is primarily a retail strategy, in their bid to play the “category captain” role it is the manufacturers that have taken the initiative to develop the expertise and the category insight required to support the process (Gruen and Shah, 2000). The key to successful category management is when these two complementary sides of the trading relationship work together collaboratively to understand the consumer and to interpret and fulfil their category needs via the joint category planning process (Gruen and Shah, 2000; Harris and McPartland, 1993; IGD, 2002). As Gruen and Shah (2000) found, retailer-supplier continuous involvement in joint category planning positively affects: “retailer system trust” - conceptualised as the retailer’s confidence in the potential benefits of category management plans and in the supplier’s capabilities/delivered information; and the “objectivity” of the category plan. Correspondingly, the study also found that the “objectivity” of the category plan, measured in terms of the plan’s freedom from supplier bias and the extent to which it delivers the consumer perceived best mix of brands and sizes, had a positive effect on category performance. However, “objectivity” describes the nature of the plan rather than its contents/constituents. Therefore, this present study seeks to understand how the consumer intelligence gathered as part of the category assessment process contributes, not to the ‘nature’ of the plan but to its actual ‘contents’; that is, how the intelligence contributes to the supplier-retailer strategy and tactics planning stages of the category management process. This objective reinforces how the application of consumer intelligence extends the boundaries of empirical category management study.

Methodology

This section details the methodology employed to achieve the research objectives outlined above.

Preliminary discussions with associates in the fashion industry identified the potential for a collaborative investigation with a manufacturer in the intimate apparel sector. The manufacturer, an international brand and its retail customer, a major UK based apparel retailer operated within the bra category, which represented all bra styles from fashionable/glamour ranges to the more staple, functional basic garments. The particular case scenario indicated that retailer and supplier both lacked fundamental knowledge of the consumer. Retailer category performance implied declining consumer interest and as such, the retailer had recently implemented assortment reduction within the category. Conversely, the supplier reported steady sales performance results from other retailers for the same category. It also presented a situation of low retailer-supplier collaboration with no evidence of joint decision-making. Acknowledging the potential benefits of the research, the manufacturer agreed to sponsor the study.

Research design

Exploratory research is appropriate when little is known of a phenomenon (Churchill, 1995, p.149). Previous category management studies in the grocery sector (Johnson and Pinnington 1998; Johnson, 1999; Qureshi and Baker, 1998) have argued the case for developing quite advanced market research “tools” for understanding how the consumer shops the various categories in the grocery sector; for example, recording point of purchase activity, exit interviews and so on. However, the subject of category management in the fashion sector is as yet unexplored. Furthermore, the research context here is a situation where the intimate apparel industry overall appears to lack fundamental knowledge of the bra consumer. Therefore, while sophisticated in-store techniques may be wholly applicable for a sector that is further advanced in category management, they may be less appropriate for gathering the required preliminary insights into consumer behaviour for the bra category. The research therefore pursued an in-depth, qualitative approach, the objective of which was to gain greater "insight to consumer beliefs, attitudes and preferences" towards the category (IGD, 2002, p 164).

The structure for the study was provided by a category management research "framework", adapted from Johnson (1999). The objective of this framework was to understand customer motivations and the impact of point of purchase marketing mix variables. It comprised three key areas of focus:

(i) The pre-purchase environment: What influences the consumer's brand choice before entering the retail store; for example, product and packaging design, advertising, or promotions, brand image / positioning? Why was a specific retailer chosen?

(ii) The consumer purchase process: What are the consumer's need states driving the purchase? Was the purchase planned or impulse and why? Where is the purchase decision made? How is the category shopped?

(iii) The in-store purchase environment: What are the in-store dynamics - that is, the in-store variables that influence the consumer purchase process – for example, availability, assortment variety, visual merchandising, category location/layout, shelf allocation, service support, in-store promotions?

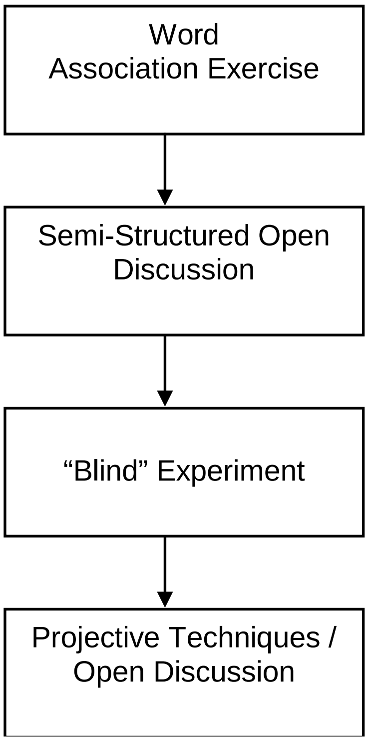
Data collection methods

Focus groups provide a versatile medium for generating rich research insights (Fern, 1982; Goldman, 1962). Furthermore, in category management research, focus groups have generated greater depth to support retail sales and panel data. They have also been adopted to facilitate the category definition process, to understand category purchase modes (Johnson, 1999), and category usage, and to identify new product opportunities (IGD, 2002).

A combination of four data collection methods was used, each selected to answer the research questions within the three areas of the adapted Johnson framework. This is represented diagrammatically in Figure 11.

To stimulate discussion of the *pre-purchase environment*, and specifically to reveal consumer's perceptions of the leading brands in the category, the research deployed a word association exercise. This was designed to determine the extent to which brands were associated with established criteria of fit, comfort, style, quality and price (Mintel, 1997). Eight different bra brands were selected to represent the category including, respectively, Berlei, BHS, Warner's, Marks & Spencer (M&S), Triumph, Littlewoods, Gossard and Playtex. To counter the risk of peer contamination, individual perceptions were captured on paper prior to general group discussion. Each respondent was requested to insert against each bra brand any number of words or phrases that could be used to describe that brand. A pre-test revealed that many respondents had difficulty in generating their own words. Thus, from interviewing a number of bra wearers a list of 40 positive and negative descriptors was compiled to which respondents could refer if required. This controlled response process (Chisnall, 1992, p. 162) lasted approximately 10 minutes.

Figure 11 Data collection methods



The second part involved a semi-structured open discussion designed to explore the *consumer purchase process* and the *in-store purchase environment.* This included questions on usage and bra buying history and also probing on preferences with respect to in-store variables; for example, merchandising/display and in-store selling activity.

Third, the research used a ‘blind’ experiment to further explore the pre-purchase environment and brand perceptions, and to understand the consumer’s design preferences. For this exercise, each respondent evaluated on paper a diverse selection of seven unbranded garments representing the category. The evaluation criteria included product design, perceived price, brand and function. Respondents were also asked to indicate the likelihood of their purchasing each individual garment.

The final method of data collection was another open, semi-structured group discussion. Due to the potentially sensitive nature of intimate apparel, this part of the study explored bra buyer behaviour from the third person perspective. This involved the use of projective techniques with the unbranded garments used as prompts (Haire, 1950).

These combined methods of data collection offered the opportunity for synergistic outcomes (Delorme and Reid, 1999) and for triangulation of the data (Denzin, 1978). In total, each four-stage focus group lasted on average ninety minutes. A neutral environment was chosen in which to host the focus groups; avoiding the stimulation and distraction within one specific retail setting broadened the discussion to cover the retail environment in general for the category. This also further supported the exploratory nature of the study.

Sample

A stratified sample was designed to include six focus groups across a range of ages and bra sizes. Using a recruiting questionnaire, Market Research Society-trained interviewers screened and recruited forty-eight respondents to participate in the study. In order to reduce the potential for sample bias (Sudman and Blair, 1999), the focus groups were recruited and conducted in three separate locations within the Midlands and the South East of England. An independent Market Research Society moderator, selected for compatibility with the respondents, directed the focus groups.

Data management

Both the word association exercise and blind experiment were completed on paper. For the former, individual comments provided against each brand name were then analysed and scored either positively or negatively for six criteria of fit, comfort, attractiveness, price, quality and a ‘no response’ that indicated low brand awareness. For example, comments such as “dull” but “good value” would score a negative point for attractiveness and a positive point for price, whereas “glamorous” and “pricey” would score the opposite. The number of positive / negative frequencies scored for each brand were then calculated. In respect of the blind experiment, the mean scores for each garment style were calculated against the evaluation criteria described above.

Each focus group was tape recorded during the open group discussion sections. The tapes were then transcribed. All of the data was then analysed following the three key activities of data reduction, data display and conclusion drawing (Miles and Huberman, 1994). Following the strategy advised by Miles and Huberman (1994) a combination of within- and cross-case analysis was undertaken. The within-case analysis generated insights into why certain behaviours, phenomena and situations existed for a particular focus group. Cross-case comparisons were then conducted in order to provide insights into how issues relating to consumer behaviour for the category varied from one focus group to another.

The combination of data collection methods outlined above generated a considerable amount of data. For conciseness, the results reported below represent a synthesis of these data.

Findings

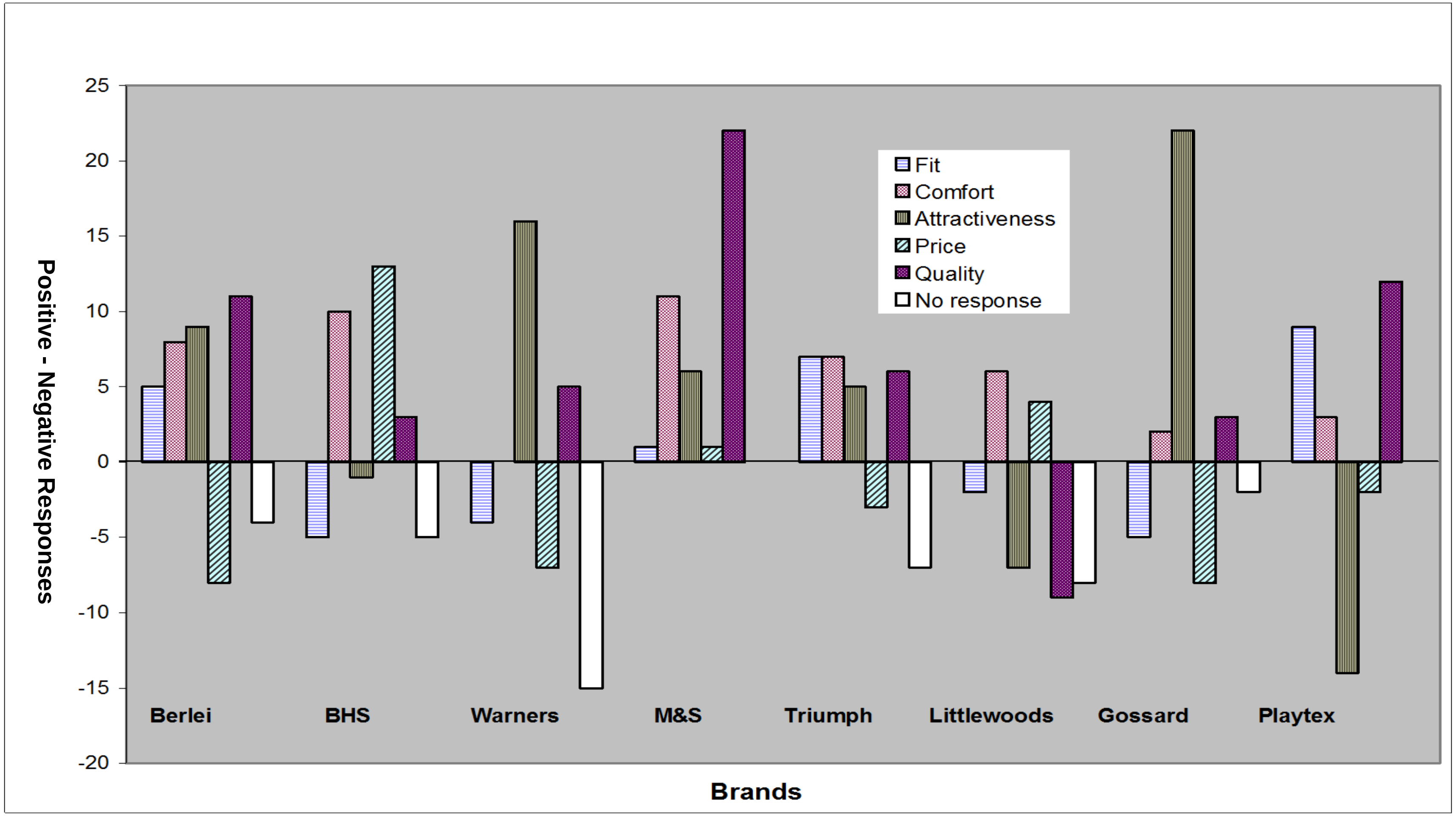
A key objective of this research was to explore how the fashion industry might use "consumer insights" to inform supplier-retailer category management relationships, and in so doing, to ascertain whether the industry might usefully deploy category management. Discussion on how the industry might apply the collected insight to specific steps of the category management process is covered in the next section. This current section presents the insights, structured in line with the category research framework outlined above.

The pre-purchase environment

In analysing the word association exercise it was apparent that the respondents held strong attitudes towards the eight listed brands. The findings illustrated in Figure 12 visually depict the respondents' positive and negative perceptions of each brand. (For each brand the score reflects the difference between the respective positive and negative responses.) These indicate that from past experience, in terms of market positioning, shoppers had formed distinct profiles of competing brands. From the mere mention of a brand name, respondents were immediately able to describe the brand's relative positioning. Not surprisingly, for the market leader, M&S, the balance of responses was positive for all criteria. In addition, half of the respondents made an unprompted association between M&S and “quality”. No other brand achieved this same consistent, positive ratings balance for all criteria: excellent scores on one criteria were always counterbalanced by significant negative scores on another. For example, Gossard achieved the highest score for attractiveness, but scored one of the lowest for perceived fit. Similarly, the Playtex brand achieved the highest mention for fit, but was negatively rated for attractiveness. Further, economy store brands BHS and Littlewoods, while scoring positively for price, were negatively scored for fit, attractiveness and quality. Warner’s scored the highest number of “no response”, which indicated a very low brand awareness.

The general group discussion generated additional insights regarding the pre-purchase environment. Surprisingly, given the high levels of brand awareness demonstrated above, respondents admitted to low brand loyalty - both for own label and manufacturer brands. Discontinuation of styles was a key complaint: *“I liked the one I had. I buy one and I like it, and then I find that they’ve stopped doing it. Or they change the range". "The big mistake is that they don’t keep the range for long enough. They turn it over too quickly". “Every season, change; out goes the one that you’re familiar with”.* The lack of size consistency both inter- and intra- brand also inhibited brand loyalty: *"You can buy one bra, even two bras from the same manufacturer, and although it says it’s the same size on the packet, they don’t fit the same".* Overall, difficulties encountered finding a well-fitting garment were seen as major obstacles to brand loyalty. Conversely, style loyalty featured strongly; once respondents had found a style that they were happy with, they would continue buying it until it was no longer available: *"I’ve got about four or five bras all the same style. I don’t know what I’m going to do if they stop doing it to be honest". "It's a problem when manufacturers change a design and they’re no longer available".* Furthermore, with respect to choice of store the consumer admitted to a tendency to store loyalty. The consumer will patronise those stores that they have found offer depth of range, size availability and specialist fitting advice, and unlike other apparel categories respondents expressed a clear preference for independent, specialist retail stores.

Figure 12 Consumer Brand Perceptions: The difference between positive and negative responses



The blind test experiment illustrated that the respondents had developed very clear design preferences. Through trial and error they had developed a set of decision rules for achieving fit and comfort. The first decision was often between non-wired versus underwired bras, whereby non-wired provided greater comfort and underwired offered greater support in more attractive designs. Fibre content was a strong consideration with respondents generally preferring natural fibres. Individual design elements prompted instant reaction. For example, the position of seams had been found to cause irritation. Likewise, depth of underband and the width and position of straps conveyed the degree of support. Collectively, the combination of salient features, fabric design and shape experienced in the past provided a quick formula for assessing the potential suitability of a new purchase. Such was the extent of their accumulated knowledge and experience of a garment's styling that most respondents could quickly evaluate the suitability of a garment without the need for trying-on. This was an important consideration given the perception of queues and customer service in chain stores: *"I do find with X that it's hard to try them on. I know they have changing rooms but there are long queues".* With respect to quality, respondents had clear expectations of fabric performance, and due to the supporting nature of the garment could detect subtle changes in function and durability: *"I've bought a few from there (chain store) over the last year or so and they've not been as comfortable for whatever reason. I've started going elsewhere". "I felt that they've changed manufacturer. The quality of another favourite one went down and that's when the elastic went and it shouldn't have."*

The consumer purchase process

The majority of the respondents described how they are initially prompted into the bra purchase process by a variety of "need states" (Johnson, 1999). These include the garment's loss of functional support through deterioration of elasticity, the decline in the garment's aesthetic appearance, a change in the wearer's own physiology driving the need to buy a different bra size or the seasonal factor of holidays prompting product replacement; *"Holidays spur me on, so if I have one holiday a year then I'd buy annually ...if I'm packing things I look and I think 'that looks awful'. Or that doesn't go with certain items I'd be wearing".* For some, the prompt to purchase is linked to the hedonic value (Laurent and Kapferer, 1985) of *“pretty”* bras; in the case of the respondents in this study, the hedonism stemmed from the way in which *“pretty”* bras are associated with *"pleasing someone else*", and further, how the wearing of them is seen as a treat or reward: “*It makes you feel special, really spoiling yourself"*.

In terms of the number of wear-occasions adopted by the bra consumer, the respondents in the study presented a range of consumer typologies, from the preference for only one bra type - *"I’ve got four or five now that I wear on the go ... they go universal if you like" -* to three-style bra wardrobe: "*three (bra wardrobes) in my case. One sports, one ordinary, one special occasion*...". The most popular preference was for two different types of bra, one type for functional everyday use and another purely for evenings: *"I just have a medium support, fairly plain bra for daytime and then I’ve got fancier stuff for the evening”.* Despite the invisible nature of the garment, there was a clear distinction between home and social use: *"I have bras for work and bras for round the house*". Comfort was an important factor and some women relegated older garments for daytime use: *“…old ones that I wear in the day and nice ones for evening". "I wear the old ones for gardening - It’s a comfort one*". However, discomfort was suffered for social occasions: *“When you go out at night you tend to wear something that’s not as comfortable - like we all squeeze ourselves into high heel shoes because they look good."*

Consistent with the behavioural implications of the high involvement profile for bras first uncovered by Laurent and Kapferer (1985), the information search for bras was described in this present study as both critical and extensive. In light of the consumer’s wide experience of the product, combined with the frequency with which bras are replaced in her wardrobe, it is surprising that women find it necessary to undertake an extensive search for each new bra purchase. This may be attributed to the reported over-frequent discontinuation of styles and the lack of size-consistency offered by the competing manufacturers. Together these increase the consumer’s perceived risk and so drive the need for her to restart the search process for each new bra purchase. Significantly, only a third of the respondents considered the actual process of shopping for a bra to be a positive, enjoyable experience. The majority found the experience *"a nightmare", "frustrating", "boring", "a necessary evil", "traumatic".* The main reasons for not enjoying the experience was the lack of attractive bras in larger sizes (*"Bras for the more fuller lady are very boring, old fashioned")*, lack of choice in general, difficulty in finding garments in stock, and the difficulties encountered in finding bras that offer fit, comfort and the right body shape through clothes.

On average and depending on the quality of the bras and how long they lasted, the respondents in this study claimed to buy a bra three to four times a year. Further, to counter the risk of obsolescence consumers tend to buy in bulk when the product *is* available. Availability of the preferred bra style is one of the key factors influencing purchase. Given the importance of comfort and fit, substitution is rarely an option in bra purchasing. Owing to the problems of limited availability of styles and sizes and product obsolescence, the majority of the women categorised themselves as convenience shoppers, buying a bra, not because they need one, but because one is available for purchase: *"If I see a nice one I think 'there's my size, I'll buy it', not because I really need it. It saves me, when I do need one, having to go and hunt for one".* In this way purchase is prompted by the marketing stimulus of an in-stock situation, and underlines how practitioners can stimulate purchase just by having an item available.

In terms of the number of bra purchases, the majority of the women bought at least two bras at a time, though it is notable that some respondents claimed they bought three or more at once. An alternative approach was to buy one bra, try it on at home, wear it and wash it, then return to buy another exactly the same or in a variety of colours. This propensity to repeat purchase and to possess multiple copies of the same garment is arguably quite unique to the bra, and it further underlines the way in which the consumer is motivated first and foremost by functionality and physiology, and then by the fear that the manufacturer and/or retailer may discontinue their preferred style.

It is significant that the majority of women prefer to shop alone for bras. This contrasts sharply with the preferred social interaction associated with other fashion categories, where "the customers comparison to referent others appears to be of paramount importance" (Dodd *et al.,* 1998) and underlines the personal, intimate nature of the category.

The in-store purchase environment

The issue of store loyalty founded on depth of range, size availability and specialist advice has been highlighted above. Overall, the chain stores were seen as offering less choice: *"It's a shame because there used to be such a big range and there isn't. All you see is 45 of the same one".* By contrast, the specialist lingerie stores were perceived to offer a greater variety of styles and depth of assortment to cater for a wider market: *"I take my two daughters to get their bras there (specialist store) as well because they have special sizes and will order anything for you".* With respect to the issue of specialist advice an important theme to emerge from nearly half of the respondents was the need to be correctly measured and fitted for a bra: *"If I find a shop that I like and I tend to keep going back there. I go to Xs now because they measure me properly*". As many respondents admitted to not knowing their correct size, they relied in part on trial and error and were therefore unsuccessful in self-selecting appropriately sized garments. One-fifth of respondents reported disillusionment caused by being incorrectly measured in the past, with a noted difference between sizes recommended by different retailers. Once again this increases the perceived risk associated with the probability of a mis-purchase. The perceived variation in fitting and measuring services, combined with the inherent size variation between manufacturers and even within the same brand, present substantial obstacles to the bra buyer. Seeking to overcome such barriers to successful purchase, over a third of respondents underlined the importance of the type of in-store advice associated with the specialist lingerie retailer as opposed to a generalist chain store. *"I prefer a specialist shop - because there's usually someone there who specialises…knows what they're talking about".*

Surprisingly, over half of the respondents considered price to be less important than fit, comfort, value and quality: *"If I see a nice one I don't even look at the price. If I think it's going to fit, it's going to serve its purpose and I like it, I'll try it on and then look at the price". "I think you get what you pay for - I used to buy cheap bras but they don't fit properly*". Some women believed the function and shape achieved by the bra to be most critical: *"If it made the best of what I'd got it would be worth any amount of money".* Furthermore, women could also be tempted to pay more for a special occasion or special purpose bra: *"If I've seen something I've liked I've pushed the boat out because it was for a special occasion." "I do quite a lot of sport so you need a good fitting sports bra, and you're always prepared to pay a lot for that".*

On the subject of category merchandising the respondents were equally split in their views towards different types of display. Half preferred to see bras displayed on hangers, mainly so that they could be more easily viewed and handled; the other half – on the basis of being able to more easily select the required size - expressed a preference for bras to be merchandised in boxes bearing a photograph of the garment, with just one unboxed item of each style on display at the fixture: *"If I go to X and get one, they're in boxes with a photograph of somebody wearing it, I know what they look like and I haven't got to rake through - I just grab one in my size and go".* Regarding category adjacency - respondents outlined their preference for intimate apparel departments to be separated from both general apparel and more importantly, from menswear: "*I wouldn't want to be looking at my bras when the men are walking through as a short cut to somewhere else."*

Discussion and Managerial Implications

As outlined in the Methodology, the context for this present study was a situation where in the absence of retailer-supplier collaborative working, the retailer was making product range decisions that sub-optimised its sales. The supplier was also suffering suppressed sales for this particular category compared with its other accounts. Perhaps worst of all, the consumer was receiving much frustration in thwarted attempts to seek a solution to her consumer needs. Category management *provides a focused, in-depth collaborative retailer-supplier approach* to: defining the category and agreeing its role; devising category strategy; and formulating tactics for implementing the strategy. As a preliminary investigation, the objective was not to collect data specifically for the purpose of working through the entire category management process (Figure 10). Rather, it was to consider how – in theory - consumer research findings could inform a category management process for a product category in the fashion sector. Accordingly, the results presented above are now discussed in the context of the relevant stages of the category management process.

Category definition

The bra market spans a range of garments, from styles that could be described as utilitarian/functional to the more glamour/special occasion. The research indicated that consumers seek a particular garment based on usage occasion and corresponding base need; for example, comfort for everyday use or glamour for evening wear. These results represent a marked contrast with the retailer's more simplistic and potentially misleading, product-based view of bra categories, which are based – not on consumer needs or motivations – but on bust size and/or bra construction (e.g., wired versus non-wired). There is a strong case for suggesting that the retailer's narrow definition of bra categories is driving their under-performance; correspondingly, better knowledge of the consumer's usage behaviour and motivations might facilitate better category definition. For example, further consumer insights about the range of bra wardrobes could inform the definition of a greater number of bra categories or, more creatively, the intelligence could be combined with that from other categories to create new categories. For instance, there may be scope for the creation of a completely new category based on "special occasions" in which a range of traditional product groupings (underwear, outerwear, accessories) could be marketed together. It is quite feasible to propose that the category management process could lead to a similar re-definition of other fashion categories.

Category role and category strategy

Category management provides a framework for retail and supply partners to jointly agree the role/business aims of the category and to plan and develop category strategy (see Figure 10). The results of this study provide initial evidence of how shared consumer insight can highlight opportunities for category growth and therefore, the opportunity for jointly developing long-term category strategy for the categories identified. For instance, in the case of the present research the identification above of a greater number of wear-occasion related bra categories, would offer the opportunity to significantly grow the market. The identification of the different categories could also help the retailer understand the ‘role’ of the particular category to their business. For example, the agreed role of the glamour/special occasion bra category as a “variety enhancer” or “occasional/seasonal” category (Dhar *et al*., 2001; Hoch, 2002) could be to generate excitement in-store. Conversely, the ‘everyday’/functional bra category could be designated a “destination” or “staples” category (Dhar *et al*., 2001; Hoch, 2002), the strategy of which would be to guarantee a level of in-store traffic for driving revenue in other categories. These same principles would apply equally to other categories of apparel. Further, this consumer research identified the importance of in-store bra fitting/advice services. If customer service is central to a retailer’s positioning, the subsequent strategy for at least one of their bra categories could be for that category to enhance the store image through this service provision.

Category tactics

In terms of implementing the strategy developed, the category management framework highlights a set of “improvement concepts” (IGD, 1999, 2002). These equate to a detailed operationalisation of the ‘Category Tactics’ Stage 6 (Basuroy *et al.,* 2001*)* of the category management process (Figure 10) and are discussed below in the context of the study's findings.

Optimal assortment

Optimal assortment or range is concerned with maximising profitability through the effective use of store space and stock. As such, it is concerned with offering a range or mix of products and individual stock keeping units (SKUs) that balance inventory costs and consumer needs. Based on the high number of SKUs required to cater for the different shapes and sizes of women, bra categories pose a particular challenge to managing assortment. Typically up to 60 different sizes are stocked in a range of colours across a variety of styles.

The most relevant insight for assortment decisions provided by this research is the identification of usage-related bra categories (see above).

Broniarczyk *et al.* (1998) found that so long as only "low-preference" items are eliminated from a retailer's assortment and that category space is held constant, retailers might be able to significantly reduce the number of items without negatively affecting assortment perceptions and store choice. The findings of this present study indicate that by reducing the variety and number of SKUs within the more functional bra category, the consumer perceived the retailer to be less effective in meeting their needs, with the obvious net result of a loss of consumer loyalty.

Optimal new products

Hines (2001) identifies the timing of partner involvement in the product development process as an important dimension in retailer-supplier partnerships. Category management's optimal new products "improvement concept" (IGD, 1999) deals with the development of new products to target specific consumer/shopper needs. It assumes that to efficiently manage the roll-out of new products and the phasing of the old, the retailer draws on the supplier's intimate and up-to-date knowledge of the consumer.

The UK's Department of Trade & Industry analysis of the retail sector (DTI, 2003, p.51) reports how market growth is being driven by the shortening of fashion cycles; for example, the movement away from "four seasons" to more frequent product range changes. Yet, as the present research demonstrates, in order to reflect consumer needs, new product development strategy for bras has to recognise the function-glamour dichotomy. The fashion industry has developed QR processes that respond quickly to retail sales data: replenishing the successful styles and delisting the un-successful. However, these may be *too* responsive for some apparel categories, allowing insufficient time for consumers to evaluate the garment before they wish to return to the store to repeat purchase. With respect to the bra category, the consumer may not expect to repeat purchase 'special occasion' bra ranges (for example, garments for social evening wear in fashion colourways), but she does expect to be allowed enough time to evaluate new, 'functional' bra ranges (for example, bras for everyday use). Across all fashion categories, for this type of product manufacturers and retailers cannot afford to subject the consumer to risk each time they approach the decision process. For the more functional bra category too much innovation may be counterproductive to customer retention. Successful new product strategy and the associated decision on the timing of range additions/deletions must therefore be based on a sound knowledge of consumer perceived risk for the different subcategories that constitute a retail category.

Consumers in the present study described how the lack of consistency across manufacturer sizes presents a distinct obstacle to purchase. In terms of product development, this highlights a clear opportunity for retailers and manufacturers to work together to achieve industry-wide standardisation in sizes, perhaps via new technology in body scanning (DTI, 2003). Conceivably, this partnership approach on garment sizing would apply to other apparel categories.

Optimal promotion

Traditionally, the level of above-the-line promotional activity for the total intimate apparel sector has been low (Mintel, 1997). This study showed that through the shopping and wear experience the consumer had developed an acute sense of the competing brands' market positioning. This included both strong positive and negative brand perceptions. This presents a clear opportunity for the industry to invest in communications to support the manufacturer's desired positioning.

Within the literature the 'optimal promotion' concept deals exclusively with sales promotions designed to stimulate sales and to create in-store excitement (e.g., IGD 1999; Dhar *et al*., 2001). The consumer's perceived risk of obsolescence, combined with her experience of product non-availability, drive the consumer to bulk-purchase. The study findings indicate, then, that retailers do not have a problem with encouraging customers to buy, so long as they have the items available for purchase. Accordingly, the scope of the 'optimal promotion' concept has been widened to consider the research's implications for "in-store promotion" and "communications" overall (Johnson, 1999, p.263).

As outlined above, many consumers perceive the bra purchase as high-risk. Consumers therefore value in-store measurement and fitting services. However, these services had proved unreliable in some cases with a fifth of respondents reporting having been incorrectly measured in the past. These findings underline the importance of in-store personal selling and highlight the potential for retail and supply partners to work together to improve the specialist fitting skills of their sales personnel.

With regard to repeat purchases, and in cases where disposable income is limited, consumers outlined their strategy to return to repeat purchase rather than buying multiple copies upfront. This is due to their strong belief that a bra cannot be judged for comfort and fit until it has been worn and washed, and represents an additional factor for the consumer to see the category as high-risk. With regard to communication strategy, this is a cue for the retailer, with support from their supplier partner, to re-design their selling and warranty policies to include the promise of reimbursement in cases of poor post-wash fitting.

Optimal replenishment

It is noted earlier that the “efficient replenishment” strategy from ECR bears a strong resemblance to the quick response concept, and that the three demand/consumer-oriented aspects of ECR (- the category management "tactics" discussed previously) offer a complement to quick response. Theoretically, then, category management does not include consideration of replenishment issues. However, the IGD’s (IGD, 1999) inclusion of the “optimal replenishment” factor in their description of category management could signify that these demand-based and replenishment-based concepts are indeed complements of each other. For this reason, the logistics-based findings from the research are included here.

Product non-availability through obsolescence or stock-outs was seen as a significant obstacle to purchase. Fearing non-availability, the bra consumer bulk buys items when they *are* available. This signals the need for the retailer-supplier partnership to improve their logistics processes to include improved forecasting competence and more appropriate inventory policies. However, the key criterion from a category management perspective is that the corresponding QR replenishment strategies reflect the identified category differences, with the more functional/basic SKUs attracting much higher expectations of stock availability. Supporting Fisher's (1999) view that innovative and functional products demand a different type of logistics "response", consumers value availability on more functional styles and expect them to be repeatable. They do not expect these products to be treated as high-fashion items that are introduced and then quickly deleted from the retailer's assortment. Arguably this finding would apply to any apparel category that incorporates basic and fashion merchandise.

Conclusions and Research Next Steps

The empirical literature on category management (Basuroy *et al.,* 2001; Dhar *et al.,* Gruen and Shah, 2000) focuses exclusively on food categories within the grocery industry and indicates that in this sector category management still faces significant development. Further, although this literature reports on the gathering of consumer insight for particular categories, it does not seek to apply these to the category management process (e.g., Basuroy *et al*., 2001). The value of this study has therefore been to demonstrate (1) how category management might offer significant benefits to fashion marketing and (2) how consumer insights for the fashion industry can be applied to the category management process. As the name suggests, the category management process focuses on a particular 'category', in this case the bra category. However, as outlined in the previous discussion of results, there is good reason to suggest that the model is generalisable to other fashion sectors.

The present paper argues that for the fashion industry category management would be complementary to quick response (QR) strategies. As such, the real value of any insight gathered for category management is in combining it with the retailer's sales data used in QR. Additional value comes from demonstrating how the combination of retailer-supplier information aids joint category planning efforts and, overall, supports the partnership approach which to date is largely missing from the fashion industry's attempts at QR. For example, in this particular study, without the consumer insight the retailer assumed that falling sales were due to a declining category. Conversely, with the insight to hand, both parties in the trading relationship learn that declining sales are the result of not meeting the customer's category needs. They both gain invaluable intelligence to use in their efforts to jointly agree the strategy and tactics for the subsequently identified categories.

The survey findings in the IGD 2002 report indicate that 96% of the study's respondents were confident that category management would be a "core business strategy" for the next decade. The authors of this report indicate that category management could be usefully transferred to other non-food sectors: *"Category management evolution is not complete…Non food retailers and providers throughout the supply chain desire the success gained in the grocery business"* (IGD, 2002, p.220). The inference from this report is that category management has still to be adopted in non-foods, and as outlined earlier, although fashion is now a key part of some grocery retailers' assortment, they have yet to adopt category management for their fashion ranges. The category management implementation issues that food suppliers have experienced at store level and the cumbersome category management process manuals (see Table 13: e.g., Gregory, 2002; IGD, 2002) could explain why the grocery sector has not moved on to implement category management in their non-food sectors. In addition, the interviews with key informants highlighted how the fashion and grocery sides of the retailer's business operate autonomously, with limited sharing of best practice.

Several opportunities for future research spring from the results of this study. In their investigation into the antecedents and consequences of category planning and implementation, Gruen and Shah (2000) found that "category plan objectivity" positively affects "category performance". This present research has shown how consumer insight can be used to create the category plan itself, and arguably the better the contents of the plan (which could be termed plan "quality"), the better the category performance. This offers the opportunity for future research to test the Gruen and Shah (2000) framework, expanded to include this category plan "quality" construct.

As an exploratory study on one product category, the objective of this research was to provide preliminary insights. The research design therefore limits the researchers to drawing anything other than tentative conclusions about how category management could benefit the fashion industry overall. In addition, in terms of obstacles to category management's transferability to fashion, it is conceivable that a demand- and consumer insight-led category management process that works for grocery products with more stable demand patterns is inappropriate for more supply-led, high fashion ranges. Therefore, in order to enable more definitive conclusions, a key research next step should be to investigate its applicability in all fashion sectors and its relative applicability in categories that span all degrees of exposure to the “fashion cycle” (Ko and Kincade, 2000). Following Ko and Kincade these could be represented by four categories as follows: highly fashionable; fashionable; fashionable and basic; and basic. Further, category management relies on detailed information on the consumer's in-store behaviour. Therefore, as a study of consumer behaviour overall, the corresponding lack of specific in-store insights collected in this research represents a limiting factor. Any future research on category management in the fashion industry should therefore employ the wide range of in-store market research techniques described by Johnson (1999) and Qureshi and Baker (1998).

This exploratory research presents early evidence that category management could offer distinct opportunities for retailers and suppliers in the fashion industry to work together to generate sustainable competitive advantage. However, the concept has not been without its critics (e.g., di-Nome, 1999; Gregory, 2001; Mitchell, 2001). Most of the criticism surrounds the cumbersome nature of the manuals and templates supporting the eight-stage process (Figure 10), the over-complexity of the data produced, and its consequent inability to highlight the key, consumer insights that are so central to the process. Acknowledging these barriers to implementation, the grocery sector has streamlined the category management process (ECR Europe, 2000). In implementing category management, the fashion industry can therefore learn from the experience of other sectors. For example, the industry would be advised to be more flexible and pragmatic in applying what would seem like an *in*flexible process (IGD, 2002). Indeed as the IGD report points out, *“non food retailers…will take learnings from existing practitioners in order to create bespoke processes to suit their markets”* (IGD, 2002, p.220). This suggests an additional and final avenue for future research. Studies designed to apply the process to different sectors of apparel would identify: the relevance of the process to the fashion industry; the industry's scope for flexibility in applying the process; and how the process can best be applied within the sector.

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Enjoyment of the Shopping Experience: Impact on Customers' Repatronage Intentions and Gender Influence

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Abstract

In this paper the authors investigate enjoyment of the shopping experience, its influence on consumers' intention to repatronise a regional shopping centre and the effect of gender differences on shopping enjoyment. Four dimensions of shopping enjoyment are proposed and a 16-item measure is developed to measure 536 consumer perceptions of the shopping experience across five counties in the United Kingdom. Findings indicate that shopping experience enjoyment has a significant positive influence upon customers' repatronage intentions. Furthermore, men are found to have a stronger relationship of enjoyment with repatronage than women. The implications of these results are discussed, together with managerial implications, study limitations, and future research directions.

Key words: Regional Shopping Centres, Enjoyment, Repatronage Intentions, Gender Influences

Paper 7. Enjoyment of the Shopping Experience: Impact on Customers' Repatronage Intentions and Gender Influence

Introduction

One of the key decisions faced by customers is where to shop in terms of shopping location and store choice [Sit, Merrilees and Birch, 2003]. As a result, retailer concern with patronage and repatronage is now an important topic of marketing research [Machleit, Meyer and Eroglu, 2005]. While considerable research has focused on patronage of retail stores, less is known about consumer intentions towards patronage of a specific shopping centre and factors that may influence repatronage. Previous research has demonstrated that store image has a significant role to play in consumers' patronage decisions [Oppewal and Timmermans, 1997]; thus it may be assumed that the image of a shopping centre may also impact on consumers' decisions of where to shop. However, while considerable work has been done on the role of store and even shopping mall image on consumer patronage [Finn and Louviere, 1996; Wakefield and Baker, 1998; Sit, Merrilees and Birch, 2003] there is, to date, very little research examining the image of the regional shopping centre, as a more holistic entity, in determining consumers' patronage decisions. This is important because understanding more about what attracts consumers to a specific shopping centre, followed by effective management of consumer evaluation, should lead to increased repatronage intentions.

Consumers have many different choices of shopping locations, however. Regional shopping centres in particular play a key role in the future of the modern economy [Finn and Louviere, 1996; Phillips and Swaffin-Smith, 2004]. Since shopping has been identified as the primary purpose for the majority of visits to town and city centres [Warnaby and Davies, 1997] having the correct retail offer and facilities to entice visitors into a regional centre results in increased spending, greater employment opportunities and hence local economic regeneration. Furthermore, regional centres have been struggling to attract and keep local customers that may otherwise 'outshop' or patronise competing shopping areas

[Kirkup and Rafiq, 1999; Whyatt, 2004; Williams, Hubbard, Clark and Berkeley, 2001].

Regional shopping centres represent more than a shopping mall in this instance. For the purposes of this paper, they include shopping areas with a wide range of shopping facilities within larger geographical regions, such as town or city centres. They contain a mixture of traditional high streets, commercial shopping malls and smaller shopping precincts, and incorporate features which are either privately owned (merchandise, buildings, signs) or publicly owned (roads, car parks and amenities) [Bell, 1999]. Perhaps a major difference is that whilst specific retailers and shopping malls have a long history of co-ordinating their advertising and promotion efforts, regional shopping centres have only recently begun to market themselves in terms of image creation and maintenance [Kirkup and Rafiq, 1999; Kupke, 2004; Warnaby and Medway, 2004]. The majority of research in this field has concentrated on shoppers' responses at the individual store or, at most, the shopping mall level; this study focuses on a relatively untouched area of research, in terms of exploring the impression or holistic image of a shopping centre as a whole and the influence it can have upon customers' future shopping decisions [Bell, 1999; Warnaby and Medway, 2004]. With this in mind, this article examines how the enjoyment of the shopping experience, as well as the attractiveness of the shopping centre itself, can influence customers' behavioural responses and whether or not they intend to repatronise that shopping centre. Furthermore, the literature also implies that shopping enjoyment may be a function of gender. For example Otnes and McGrath [2001] recognise gender differences in shopping behaviour, involvement in the shopping process and attitudes towards shopping as a social activity. This is consistent with the view that women behave differently to men [Stern, 1999] and often display differing approaches to socialisation [Severiens and Ten Dam, 1998]. Thus there are theoretical reasons to expect that women may experience shopping enjoyment differently to men. However, empirical research into the role that gender may play in determining shopping enjoyment is sparse, and efforts on this front are warranted.

Therefore, the objectives of this research are threefold. Firstly, the research seeks to generate an understanding of the broad factors that contribute to consumer image perceptions of shopping centres and their associated enjoyment of the shopping experience. Secondly, the research aims to discover the impact that enjoyment of shopping in a specific shopping centre has upon customers' repatronage intentions. Thirdly, the research seeks to examine whether there are differences in the relationship between enjoyment of shopping and repatronage intentions based upon whether respondents are male or female.

The paper is organised as follows. Firstly, the existing literature is discussed in order to develop the theoretical background and the conceptual framework to the study. Then, based on factors involved in the creation of shopping location image, enjoyment and repatronage, hypotheses are generated and proposed. The section following this explains how gender could impact upon enjoyment of the shopping experience and its relationship to repatronage intentions. The following section describes the methodology used in the study, including the sample, measures and scales generated. The following section contains the subsequent analysis and results, while the final section discusses the findings, puts forward implications for managers of regional shopping centres and suggests some directions for future researchers to consider.

Theoretical Background

This section discusses the background literature relating to image, enjoyment, repatronage and gender. It is established that the concept of image is intrinsically linked to retail patronage [e.g. Darden and Babin, 1994] and store loyalty [Mazursky and Jacoby, 1986]. The literature on image therefore provides an important starting point to understanding the potential linkages with behavioural concepts of enjoyment and repatronage of shopping centres.

Image

The literature pertaining to image is mainly focused on the retail store and its ability to project a distinctive identity or 'personality' in comparison with its competitors [Martineau, 1958]. In adapting the store image literature, the image of a regional shopping centre is similarly hypothesised to create a distinct identity, which distinguishes it from other, competing centres. The image of a shopping location has been described as a multidimensional concept consisting of features which are broadly summarised into two categories: firstly tangible or functional attributes which relate to its physical features; and secondly the more intangible attributes which represent its atmospheric qualities [McGoldrick, 2002]. The image of a regional shopping centre is thus considered to be an holistic entity created from elements such as retail mix, infrastructure and atmosphere [Leo and Philippe, 2002] which can be managed to create a shopping destination which is attractive to potential customers [Warnaby and Medway, 2004]. A strong image of a shopping location creates competitive advantage [Sit, Merrilees and Birch, 2003], being associated with greater willingness to purchase, longer time spent shopping and higher sales turnover; in effect more positive patronage behaviour [Bitner, 1992; Dennis, Newman and Marsland, 2005; Oppewal and Timmermans, 1997]. Specific image dimensions can influence emotional responses and patronage decisions in particular shopping situations [Finn and Louviere, 1996; Tai and Fung, 1997]. This study aims to identify the dimensions of regional shopping centre image which are believed to affect customer behaviour by evoking a range of emotional responses and to examine how these dimensions influence purchasing behaviour and patronage decisions.

Enjoyment

Shopping has been referred to as a fun, pleasurable activity that leads to feelings of 'joy' [Jin and Sternquist, 2004]. Positive image has been shown to create higher levels of pleasurable feelings in customers, and reflects their enjoyment of spending time in the area [Bell, 1999]. Some attention in the retail literature has focussed on the notion of excitement [Wakefield and Baker, 1998]. However, whilst excitement corresponds to an emotional state that elicits high levels of pleasure and arousal, enjoyment tends to represent a less emotionally intensive evaluation, which is similar to liking. Of the two emotional states, logic would dictate that customers would find themselves in a state of enjoyment more often than a state of excitement, especially if they are regular shoppers. Bell [1999] supports the notion that affect, or liking, is a more stable concept capturing consumers' perceptions of a shopping centre. Enjoyment itself has been reported as a motivation for 'bricks' shopping, as opposed to shopping on the Internet [Dennis, Newman and Marsland, 2005] so the importance of the construct to modern shopping centres is clear. Therefore, research examining the notion of enjoyment appears to be more theoretically valid than excitement for research into general shopping areas where customers are likely to shop more frequently.

Repatronage

Whilst the work examining retail patronage at the store level or shopping mall level has long attracted the attention of researchers [e.g. Burns and Warren, 1995; Spies, Hesse and Loesch, 1997; Grewal, Baker, Levy and Voss, 2003], work investigating these effects at the geographical shopping centre level remains sporadic. The quality of the shopping experience is generally thought to have a positive effect on customers' behavioural intentions [Tai and Fung, 1997; Wakefield and Baker, 1998], with enjoyment of shopping as a pleasurable experience associated with raised patronage [Mano, 1999]. Further, it has been hypothesised that higher levels of excitement lead to greater repatronage intentions [Wakefield and Baker, 1998]. For the purposes of this study, enjoyment is thought to be a more relevant construct to delineate than that of excitement; nevertheless a similar relationship is hypothesised in the current study between the notion of enjoyment of the shopping experience and repatronage intentions.

Gender

The role that gender plays in consumer behaviour research is certainly worthy of researchers' attention [Palan, 2002; Stern, 1988]. Indeed, marketers have been particularly interested in the roles that gender plays as it can have a significant impact upon consumers' behaviour [Stern, 1988; 1999]. Much of the research in consumer behaviour has focussed upon constructs such as biological gender (i.e., male or female) [Palan, 2002], gender roles [Lavin, 1993], or gender identity [Fischer and Arnold, 1994]. Previous work has identified differences in shopping-related attitudes based upon biological gender [Palan, 2002] and gender roles [Lavin, 1993], although distinct gender roles appear to have become somewhat blurred as evidenced by more recent work [Otnes and McGrath, 2001]. For the purposes of this paper, gender is used to refer to biological gender and, to a lesser extent, gender roles rather than other gender-related concepts such as gender identity [Fischer and Arnold, 1994; Palan, 2002].

Conceptual Development

Since the early conceptualisation of store image by Martineau [1958], various researchers have sought to decompose image into a set of dimensions that are most valued by consumers and thus may be controlled and measured. In summarising the store image literature, Lindquist [1974] concluded that nine different dimensions contributed to consumers' perceptions of store image; namely merchandise, service, clientele, physical facilities, convenience, promotion, store atmosphere, institutional factors and post-transactional satisfaction. While many of these aspects of store image are also applicable to the broader regional shopping centre, the regional centre as a whole also contains public spaces which are beyond the scope of individual retailers to directly manage or influence, such as architectural design, street layouts, tenant mix, parking, refreshment and toilet facilities [Bell, 1999; Oppewal and Timmermans, 1999]. These studies (*ibid*) have shown that such aspects of the holistic retail area will also influence customer perceptions and hence patronage intentions.

Consequently, for the purposes of this study, we focus on those factors that are specific to the shopping centre as a whole, rather than the micro-management level issue pertinent to individual stores. Specifically, building on attributes of shopping centre image commonly discussed in the literature, we identify four dimensions, which we believe are central to the notion of the shopping enjoyment experience. These attributes are selected for their relevance in defining a particular shopping centre as an holistic entity, rather than relating to individual stores.

First *accessibility* refers to the convenience and logistic aspects of store location, travel, parking and pedestrian areas. This functional dimension of shopping centre image has received attention in the literature, and is considered important on a number of fronts [Sit, Merrilees and Birch, 2003; Dennis, Newman and Marsland, 2005]. However, while some early research has considered travel distances in relation to shopping centre patronage, Bell [1999] in particular notes that these considerations have until now failed to capture emotional responses which lead to consumers' image perceptions.

Second, *environment* refers to consumers' responses to the more practical aspects of shopping centre management. Previous research has identified these aspects to include cleanliness of the shopping centre [Oppenwal and Timmermans, 1999], opening hours and security [Lehtonen and Maenpaa, 1997], which, when combined have been shown to influence patronage decisions [Sit, Merrilees and Birch, 2003].

Third, *atmosphere* has received considerable attention in the marketing, retailing and organisational behaviour literature in the context of consumer response to the physical environment. In the special case of a shopping centre, atmosphere relates to perceptions of the visual appeal of the architecture and window displays, appreciation of store variety, and the comfort elements provided by cafes and restaurants, all of which are associated with positive evaluations of a shopping centre and hence likelihood to repatronise [Wakefield and Baker, 1998].

Finally, research into services marketing and retail has determined that attitudes of *service personnel* have an important part to play in influencing customers' shopping experience and the positive or negative impression formed by the customer [Bitner, Booms and Tetreault, 1990; McGoldrick, 2002; Parasuraman, Zeithaml and Berry, 1988]. Indeed, according to Mittal and Lassar [1996, p. 105] personnel displaying enthusiasm and warmth can lead to a 'personally rewarding shopping and service experience'.

Therefore, in this study we sought to generate items to measure each of the four dimensions mentioned above. It is hypothesised that these four dimensions will reflect a higher order latent construct, namely enjoyment of the shopping experience. Next, we will discuss in more detail the reasoning behind the formation of the enjoyment of the shopping experience construct, based upon a brief review of the retail and shopping literature.

Dimensions of enjoyment of the shopping experience: Accessibility

With increased car ownership, customers are prepared to travel longer distances to patronise shopping centres where the retail mix is sufficiently attractive, rather than making shopping centre choices based on the nearest convenient location

[Dennis, Marsland and Cockett, 2002; Whyatt, 2004]. This suggests that ease of travel to and within attractive locations has an important role in shopping decision making, particularly in regard to the growth of competition from Internet shopping [Dennis, Newman and Marsland, 2005].

Sit, Merrilees and Birch [2003] separate accessibility in a shopping centre into 'macro-accessibility' which refers to transport links from the home location to the shopping centre, and 'micro-accessibility' which refers to parking facilities and ease of navigation between stores and other facilities within the centre, arguing that paying attention to both aspects will make the shopping experience more enjoyable. This is supported by Leo and Philippe [2002] who indicate that poor directional indicators for travellers to a shopping location result in dissatisfaction and disappointment with the shopping expedition. Oppewal and Timmermans [1999] found that one of the aspects of the micro-accessibility of public space, which were favoured by customers, was compactness of layout, in terms of accessing stores and space reserved for pedestrian access.

It seems likely, therefore, that factors that contribute towards a customer's perceptions of shopping accessibility, such as transport links and car parking facilities, as well as store location and ease of movement for pedestrians, should influence their enjoyment of the shopping experience. Based upon this, we propose that customers' enjoyment of the shopping experience will reflect the accessibility of the shopping region.

Dimensions of enjoyment of the shopping experience: Atmosphere

The effects of atmospherics, or physical design elements, on consumers is recognised by managers and mentioned in virtually all marketing, retailing, and organisational behaviour texts [Bitner, 1992; Mazursky and Jacoby, 1986; McGoldrick and Pieros, 1998; Spies, Hesse and Loesch, 1997], and has been argued to provide an extremely effective point of competitive differentiation [Bell, 1999; Tai and Fung, 1997]. However, despite this attention, little empirical work has been completed to address the effects of physical surroundings on customers' behavioural responses in regional shopping centres [Dennis, Murphy, Marsland, Cockett and Patel, 2002; Kirkup and Rafiq, 1999].

Atmosphere is created by the interaction between the location's physical attributes and customers' subjective perceptions [Hackett, Foxall and Van Raaij, 1993]. Therefore atmosphere is reflected in customers' reactions to the physical environment and is related to purchasing behaviour [Spies, Hesse and Loesch, 1997; Smith and Burns, 1996; Tai and Fung, 1997]. Within the store environment, customers are stimulated by atmospheric aspects such as music, lighting, space, colours and aromas [McGoldrick and Pieros, 1998; Wakefield and Baker, 1998]. In a regional shopping centre, atmosphere is created by customers' responses to the broader aesthetic appeal of the centre, such as the visual appearance of the architecture and the variety of the store range or tenant mix [Bell, 1999; Leo and Philippe, 2002; Wakefield and Baker, 1998]. The attractiveness of storefronts and window displays, and the availability of cafes and restaurants, also contribute to atmospherics in a shopping location [Oppewal and Timmermans, 1999; Sit, Merrilees and Birch, 2003; Warnaby and Medway, 2004].

According to environmental psychologists, individuals respond to places with two general reactions: approach and avoid [Mehrabian and Russell, 1974]. Approach behaviours include all positive behaviours that might be directed towards a place, such as desire to stay or explore [Bitner, 1992]. A study by Donovan and Rossiter [1982] found that in retail settings perceptions of the shopping environment influenced positive approach behaviours, namely shopping enjoyment, returning, and time spent browsing. The better the atmosphere, the more positive the perceptions of the shopping centre are likely to be [Bitner, 1992]. Therefore, we expect that attitudes towards shopping centre atmosphere, resulting in a positive influence upon shopping enjoyment, will have a positive impact upon repatronage intentions. This leads us to propose that customers' enjoyment of the shopping experience will be reflected by their perceptions of the atmosphere of the shopping region.

Dimensions of enjoyment of the shopping experience: Environment

Characteristics of the physical shopping environment also influence perceptions of that environment [Bitner, 1992], and the retail environment also influences shopping enjoyment and returning behaviour [Donovan and Rossiter, 1982]. This study argues that factors in the physical environment which are specific to the centre as a whole will influence customers' enjoyment of shopping. These factors are within the responsibility of managers of regional shopping centres, and include security, cleanliness of the shopping centre, and opening hours which are convenient to customers [Sit, Merrilees and Birch, 2003; Whyatt, 2004].

These factors have received limited attention in the literature [Sit, Merrilees and Birch, 2003], yet are important considerations in customers' image perceptions of the shopping centre, as distinct from individual stores or even shopping malls. For example, even where stores and shopping malls create a feeling of safety, this does not easily transfer to the broader shopping centre area [Lehtonen and Maenpaa, 1997]. Perceptions of high levels of crime associated with the regional area in general create negative image connotations for the shopping centre within that area, which are unrelated to individual stores [Sit, Merrilees and Birch, 2003]. Keeping the public space areas clean and tidy through maintenance of the streets, hallways and buildings is an important factor in customers' perceptions of the pleasantness of the shopping experience [Oppewal and Timmermans, 1999]. Again, opening hours are determined in many cases by local authorities rather than by individual stores [McGoldrick, 2002]. As customers become increasingly time-pressed, and with the availability of extended shopping hours, store opening hours, which are convenient for those who cannot shop during 'normal' shopping times, are a factor in encouraging many more customers to patronise the shopping centre [McGoldrick, 2002; Wakefield and Baker, 1998]. This study argues that these three management aspects of the environment of the shopping centre, namely safety, cleanliness and opening hours, will be reflected in customers' attitudes towards enjoyment of the shopping experience.

Dimensions of enjoyment of the shopping experience: Service Personnel

Previous work examining service encounters in retail settings has found that the attitudes and behaviours of employees can have a positive influence upon customers' emotions, satisfaction, perceptions of quality and hence purchase intentions [Babin, Babin and Boles, 1999; Baker, Parasuraman, Grewal and Voss, 2002; Dabholkar, Thorpe and Rentz, 1996; Parasuraman, Zeithaml and Berry, 1988]. Similarly, it has been found that delays in service, or poor service overall, can lead to negative impressions being formed of the service received [Bitner, Booms and Tetreault, 1990]. It can be assumed, therefore, that if employees display positive attitudes or sufficiently impress the customer, then the customer will leave with a more favourable impression of the retail encounter, at least with the individual service encounter or individual store.

At the level of the individual retail store, evaluations of service quality are known to be linked with repatronage intentions, with more favourable perceptions of service quality resulting in more favourable behavioural intentions such as recommendation, preference and greater repatronage [Darian, Tucci and Wiman, 2001; Sivadas and Baker-Prewitt, 2000]. These authors indicate that interaction between the customer and service personnel is a deciding factor in the patronage decision. Customer service quality is variously described as consisting of friendliness, knowledge of goods sold, ability to give advice, respect and responsiveness without being ‘pushy’ [Darian, Tucci and Wiman, 2001; Leo and Philippe, 2002]. For the purposes of this study, these last four components are summarised as ‘helpfulness’.

It should of course be noted that much of the prior work investigating service encounters has been conducted at the individual store level, rather than attempting to unravel the mystery of shopping centre impressions, as the current study seeks to do. Unlike the factors representing shopping environment which are related to the public aspects of the shopping centre, customer service quality may be more relevant to individual stores than to the overall regional centre, since individual retailers may have specific staff training programmes which differ from one another. Nevertheless, Leo and Philippe [2002] show that knowledgeable staff that gave good advice contributed to perceptions of the entire shopping centre, rather than an individual store. Sivadas and Baker-Prewitt [2000] consider that, unlike customer satisfaction, which represents an evaluation of an individual service encounter, ‘service quality’ refers to a global measure of service performance, which can be extended to the shopping centre level. Furthermore, Darian, Tucci and Wiman [2001] have shown that service quality needs only to meet a basic minimum threshold level to be seen as acceptable to customers; reaching this threshold level, rather than delivering outstanding service, is more likely to occur in more stores across the shopping centre as a whole.

Customer service quality can therefore be considered a dimension of the holistic shopping centre image in that it represents the ‘augmented product’ that supports the basic merchandising function of the shopping centre and also adds value to the total enjoyment of the shopping experience [Sit, Merrilees and Birch, 2003]. Therefore, we propose that customers’ enjoyment of the shopping experience will be reflected in the extent to which customers perceive that they have received good service in terms of friendliness and helpfulness of staff. It seems logical that if a customer has a favourable impression of a service encounter, it indicates that they have enjoyed the encounter and this will lead to a more favourable impression of the shopping centre. Furthermore, they are more likely to return to the shopping centre.

Outcomes of Enjoyment

In inferring that enjoyment should have an important role in determining repatronage intentions for a particular location, it should also be noted that individual consumers place different importance on the various image attributes of a shopping centre [Luomala, 2003]. Therefore, one of the objectives of this research was to attempt to generate a generic measure of shopping enjoyment and shopping centre attractiveness rather than to provide a limited-scope measure. In doing so, the current study builds upon the earlier work of Oppewal and Timmermans [1999], Sit, Merrilees and Birch [2003], and Wakefield and Baker [1998]. The longer a consumer spends in a retail environment, the more they are likely to spend [Donovan, Rossiter, Marcoolyn and Nesdale, 1994; Wakefield and Baker, 1998]. Work by Donovan and Rossiter [1982] found that enjoyment of a retail experience results in more time being spent shopping and return patronage. In retailing studies, satisfaction with the retailing experience has been hypothesised to increase intentions to revisit the shopping area [Dabholkar, Thorpe and Rentz, 1996; Parasuraman, Zeithaml and Berry, 1988]. Therefore, we hypothesise the following:

> H1: The greater the customer’s enjoyment of the shopping experience, the greater the likelihood of his or her returning to the shopping centre in future.

The Influence of Gender

Evolutionary psychology contains a theory known as the 'Savannah Hypothesis.' This hypothesis argues that human psychology has been shaped by the need to evolve and adapt to the savannah environment [Dennis and McCall, 2005]. More specifically: "selection has favoured preferences, motivations and cognitions to explore and settle in environments abundant with the resources needed to sustain life" [Buss, 1998, p. 83]. While it is outside of the scope of this paper to initiate detailed discussion of the Savannah Hypothesis, authors have recently begun to posit that this evolutionary adaptability may influence the way that we shop [Dennis, Newman and Marsland, 2005]. It is thought that explanations of our shopping behaviour may actually date back to the earliest known roles of women and men, namely gatherer and hunter respectively. Earlier research seems to confirm the existence of well-defined gender shopping roles [Fischer and Arnold, 1994] although more recently relaxed gender roles seem to have surfaced [Otnes and McGrath, 2001]. This relaxation of gender roles is perhaps not that surprising, given that most early conceptualisations of gender roles are biased [Stern, 1999]. In this paper, however, we adopt the Savannah Hypothesis view that gender differences in shopping are apparent, as discussed next.

It has been argued that men and women differ in relation to how they process information, their attitudes towards shopping motivations and responsibility, how they process environmental cues, and their needs in the selling encounter [Minahan and Beverland, 2005]. Indeed, recent research has begun to present typologies of the respective shopping styles of men and women [Allegra, 2002; Bakewell and Mitchell, 2004; Campbell, 1997; Dholakia and Chiang, 2003; Miller, 1998; Otnes and McGrath, 2001; Underhill, 1999]. However, despite this work, there remains a need for further research examining differences in shopping behaviour across gender [Otnes and McGrath, 2001]. What authors have found thus far is that for most shopping experiences females are generally characterised by: imagining and envisioning the merchandise in use [Campbell, 1997]; weighing up of the pros and cons of the purchase [Laroche, Saad, Cleveland and Browne, 2000]; taking pride in their ability to shop [Underhill, 1999]; viewing the shopping process as a leisure activity [Bakewell and Mitchell, 2004]; spending longer shopping than men [Campbell, 1997]; visiting more shops than men [Allegra, 2002]; shopping more often than men [Dholakia, 1999]; including social interaction as an important part of the shopping experience [Otnes and McGrath, 2001]; including entertainment in the shopping experience [Haytko and Baker, 2004]; and shopping to express love for families and social networks [Miller, 1998]. Generally, women view the process of shopping as a very social experience [Campbell, 1997]. These findings imply that women who enjoy shopping are likely to intend to repatronise a shopping centre based upon this level of enjoyment.

Men, on the other hand, generally have their shopping style characterised by the following: incisiveness, decisiveness, determination, and excitement at the ‘moment of the kill’ or purchase [Dennis Newman and Marsland, 2005]; instrumentality and product specificity [Campbell, 1997]; lack of patience and trying to complete the shopping activity in the shortest possible time [Bakewell and Mitchell, 2004]; preference for top brands as both symbols of economic power [Underhill, 1999] and time savers [Bakewell and Mitchell, 2004]; and shopping for power and achievement, so called ‘shopping to win’ [Otnes and McGrath, 2001]. Here, we notice that men are characterised by a lack of patience and a desire to finish the shop as soon as possible.

Notably, the differences between genders most appropriate to this study are the lack of patience on the part of men, and the desire to shop more often on the part of women. While there is indication that enjoyment of the shopping experience will result in heightened repatronage intentions for both men and women, we expect a stronger relationship between these two major constructs for women due to their more ‘involved’ approach to shopping. For a woman enjoying shopping, the intention to repatronise a shopping region should be appreciated as an opportunity to spend more time shopping, visit more shops, and to shop more often. Men, seeing shopping as a fast, practical solution to a problem, are unlikely to want to draw out their shopping experience, even if they are enjoying it. This is consistent with gender role theory that argues women and men adopt different approaches when the notion of socialisation is considered [Severiens and Ten Dam, 1998]. Hence, while there may be a relationship between enjoyment of the shopping experience and intentions to repatronise for men, we expect this relationship to be weaker than that for women. This is simply because the involvement of women in the shopping process appears to be greater [Otnes and McGrath, 2001], so the existence of a stronger relationship between shopping and outcomes seems more logical. This leads to the formulation of the following hypothesis, building upon H1 earlier:

> H2: The strength of the relationship between the customer's enjoyment of the shopping experience and the likelihood of his or her returning to the shopping centre in future will be greater for women than for men.

Methodology

The specific aim of the research was to investigate the construct of enjoyment of the shopping experience and its relationship towards repatronage of United Kingdom shopping districts. To this end, a quantitative approach was adopted, employing questionnaires submitted to respondents during face-to-face interviews. Such methods allow for the controlled collection of large amounts of specific information from respondents [Churchill and Iacobucci, 2004].

Sample

The survey was conducted during daytime shopping hours in December 2004, as part of a wider study commissioned by the Sector Skills Council for the retail sector[4]. As the primary area of interest was the East Midlands region of the United Kingdom, customers in 17 regional towns and cities were targeted. Interviewers were asked only to target those customers who were resident in the area of interest. The study targeted 550 customers, 50 each in the cities of Derby, Leicester, Lincoln, Northampton and Nottingham, and 25 each in the towns of Boston, Buxton, Chesterfield, Corby, Grantham, Hinckley, Kettering, Loughborough, Mansfield, Newark, Oakham and Wellingborough. Once interviews were completed, responses from those who lived outside of the East Midlands were removed, resulting in a total of 536 usable responses.

[4] www.skillsmartretail.com

A stratified random sample was used. Overall, the sample was 61% female, 39% male. Females between the ages of 16-25 and 36-45 years of age made up the largest proportion of the total sample (21.1% and 21.5% respectively). Most males were between 26-35 and 46-55 (14.7% and 16.4% of the total sample respectively). 36% of respondents had children, and 62.3% were employed. The sample was predominantly Caucasian (89.7%).

Measurement

Respondents were asked to name the location where they shopped most and to give their perceptions of their current location as a shopping destination. In order to generate the scale to measure shopping enjoyment and location attractiveness, questionnaire items were adapted from previous work by Wakefield and Baker [1998], Oppewal and Timmermans [1999] and Sit, Merrilees and Birch [2003].

Items were selected for relevance to the shopping region as a whole as opposed to describing characteristics of individual stores; these items are within the remit of managers of the shopping region rather than being the responsibility of individual store owners or managers. For example, Sit, Merrilees and Birchs' [2003] dimensions of macro-accessibility, micro-accessibility, personal service, food stops, and security were utilised for the scale, while items more relevant to individual stores, such as music, product range and colour scheme, were omitted. Items employed by Oppewal and Timmermans [1999] to assess customer perceptions of public spaces, window displays, pedestrianised areas, and maintenance (or cleanliness) were also used. Finally, items appearing in the work on shopping malls of Wakefield and Baker [1998] were adapted to measure architecture and design factors, store variety, desire to stay and repatronage intentions, again omitting items such as aroma and temperature, which refer to individual stores. In total, 16 items were generated from the literature to measure the four dimensions of enjoyment of the shopping experience proposed here.

Once items had been generated, they were subjected to peer review from six academics with backgrounds in retail and/or methodology. At the conclusion of the peer review process, four protocols were carried out on the questionnaire, in order to assess potential difficulties in questionnaire completion or understanding. Neither the peer reviews nor the protocols highlighted any significant concerns.

Overall, the measure was designed to reflect the amount of enjoyment derived from a shopping centre experience, with the latter comprising the following four dimensions: accessibility of the shopping centre, atmosphere of the shopping centre, attitudes towards shopping centre environment, and attitudes towards shopping centre personnel [c.f., Oppewal and Timmermans, 1999; Sit, Merrilees and Birch, 2003; Wakefield and Baker, 1998].

The endogenous variable was intentions to repatronise the shopping centre. This outcome was measured by a single item: "It is likely that I will shop in (location) in the future." Respondents indicated the extent to which they agreed with each questionnaire item using a 10-item scale ranging from 1 (very low agreement) to 10 (very high agreement). In addition to the scale questions, respondents also supplied demographic data, including age, gender, and ethnicity.

Scale properties

Initially, the 16 items comprising the shopping enjoyment and location attractiveness scale had their variability assessed. All 16 items displayed acceptable means and standard deviations given the scale range from one to ten (means of individual items ranged from 5.24 to 8.15; standard deviations ranged from 1.649 to 2.634). Following the recommendations of Gerbing and Hamilton [1996], the 16 items were then subjected to an exploratory factor analysis (to identify poorly performing items) and subsequent confirmatory factor analysis (for additional scale purification). All structural equation models were assessed using LISREL 8 [Jöreskog and Sörbom, 1993] utilising the maximum likelihood procedure and the covariance matrix as input. Two items were removed during this analysis due to poor factor loadings and/or cross-loadings on more than one factor. The items that were removed pertained to crowdedness of the shopping centre ("it is too crowded") and the range of fashionable goods sold in stores ("the stores sell a good range of fashionable items"). The results of the confirmatory factor analysis for the remaining 14-item measurement model are shown in Table 14.

Table 14 Model Fit Measures

Model	χ^2 (df)	p	RMSEA	NNFI	CFI	GFI
Measurement	306.80 (86)	.000	.073	.937	.949	.922
Restricted	477.36 (206)	.000	.074	.933	.924	.884
Unrestricted	459.30 (205)	.000	.096	.937	.938	.888

Note: RMSEA = root mean square error of approximation; NNFI = Non-Normed Fit Index; CFI = Comparative Fit Index; GFI = Goodness-of-Fit Index.

As indicated in Table 14, the measurement model has adequate fit statistics with regards to all of the fit indices presented. A full list of the items retained following factor analysis, and the dimensions of enjoyment of the shopping experience to which they were assigned, can be found in Appendix A. The properties of the scale for enjoyment of the shopping experience are shown in Table 15 below.

Table 15 Correlations and Measurement Properties

	Mean	S.D.	1.	2.	3.	4.	5.
1. Accessibility	7.75	1.43	*.70*				
2. Atmosphere	7.19	1.94	.56	*.89*			
3. Environment	7.54	1.81	.69	.81	*.83*		
4. Personnel	7.75	1.81	.55	.65	.79	*.95*	
5. Repatronage	8.89	1.37	.32	.37	.45	.37	*.70* [a]

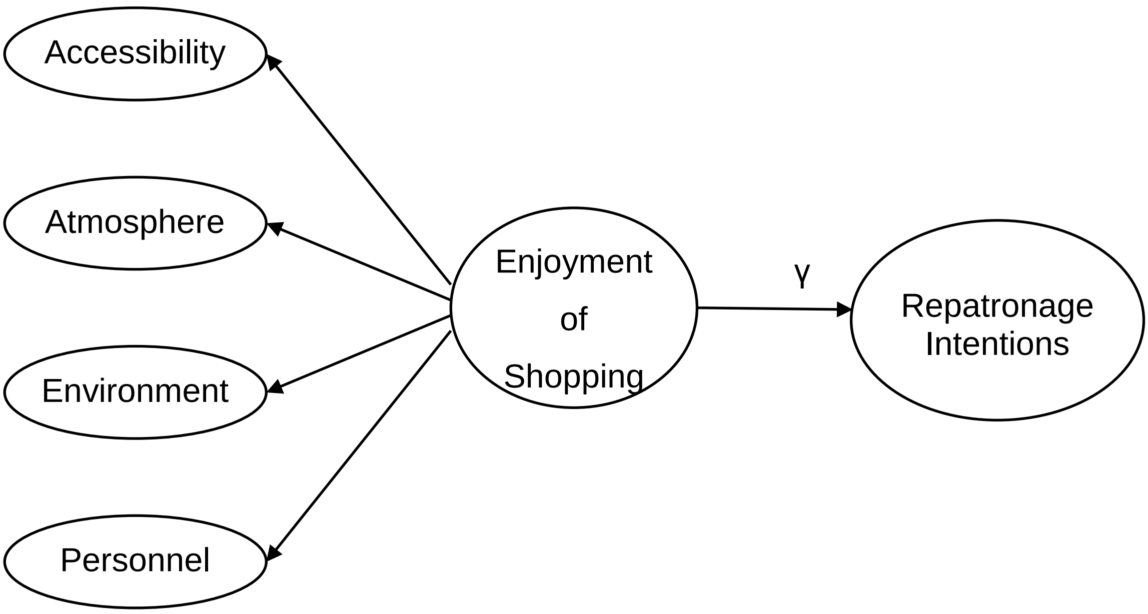
Note: item inter-correlations are shown; composite reliability of each dimension is shown on the diagonal in italics; [a]: reliability of the single indicant set at .70

Analysis

Once the properties of the scale had been assessed, a model was run depicting the influence of enjoyment of the shopping experience upon customers' repatronage intentions. A conceptual diagram of the structural model is shown in Figure 13 below.

In order to assess gender differences in the γ parameter between men and women, two competing models were run via multi-group analysis. Firstly, a restricted model was run in which the γ value was fixed to be identical between men and women. The fit statistics for this restricted model are shown in Table 14. Following this, a second model was run in which the γ parameter was estimated freely. The fit statistics for this unrestricted model are also shown in Table 14. As can be seen, the fit statistics for the unrestricted model show a substantial improvement over the restricted model. This confirms that there is a difference in the strength of the relationship between enjoyment of the shopping experience and intentions to repatronise the shopping centre across gender. More specifically, in the unrestricted model, χ^2 decreases by 18.06 with an associated decrease of one degree of freedom, which is significant at $p < .05$ (to be significant at the 5% level, the critical value for a Chi-Square change with one degree of freedom is 3.84). Similarly, we see an increase in the Non-Normed Fit Index, the Comparative Fit Index, and the Goodness-of-Fit Index of the unrestricted model over the restricted model. Therefore, based upon these results we used the unrestricted model to inform our hypotheses.

Figure 13 Conceptual Model of Shopping Enjoyment



Results and Discussion

The original hypothesis of this study was that the enjoyment of the shopping experience at a regional shopping centre is positively related to customers' repatronage intentions. It was hypothesised that enjoyment of the shopping experience is reflected by four dimensions: accessibility, atmosphere, environment and service. Factor analysis using LISREL 8 confirmed the presence of a four-dimensional, reflective enjoyment of the shopping experience construct as evidenced by the fit indices presented in Table 14 being above the recommended statistical thresholds [Hu and Bentler, 1999].

The results from the analysis show that the relationship (γ parameter) between enjoyment of the shopping experience and intentions to repatronise the shopping centre is positive and significant for both males and females in our study, lending support to H1. This indicates that there is a significant, positive relationship between enjoyment of the shopping experience (as measured by the scale developed here) and intentions to repatronise a shopping region.

However, contrary to our expectations, the relationship between the two focal constructs appears to be stronger for males than for females. More specifically, when considering the results of the multi-group analysis, the results show that there is a stronger relationship (γ parameter) between enjoyment of the shopping experience and intentions to repatronise the shopping centre for males than for females. For males, $\gamma = .77$ (t-value = 7.81) and for females $\gamma = .31$ (t-value = 4.46). Hence, the findings here do not provide support for H2. Indeed, the standardised parameter estimate for males is almost two-and-a-half times the magnitude of the standardised parameter estimate for females.

While this may at first appear counterintuitive given the arguments put forward in support of H2, there may in fact be perfectly logical reasons for this finding. We assumed in our arguments that men, due to impatience when shopping, are unlikely to have as strong a relationship between enjoyment of shopping and repurchase intentions. Predominantly, we hypothesised that this was as a result of women’s predisposition towards enjoyment in and pride towards shopping, as well as increased involvement in shopping. We extrapolated out this superior involvement in the shopping experience to conclude that women should have a stronger disposition towards repatronage if they enjoyed the shopping experience.

However, given that men are shrewd and incisive when shopping [Dennis, Newman and Marsland, 2005] their enjoyment of a shopping experience may be driven by their desire to fulfil certain of their shopping experience expectations. Perhaps shopping is a functional activity for men, and enjoyment of shopping for men is actually driven by their shopping experience allowing them to be decisive, and to complete their shopping quickly and efficiently. Another reason could be that the gender role associated with men when shopping could be outdated, or incorrect [c.f., Stern, 1999].

On the other hand, for women, enjoyment is related to shopping as a leisure activity. Shopping for pleasure for women includes elements of browsing and investing time in comparison of available alternatives before making purchase decisions. To do this, women are more likely to ‘shop around’ [Campbell, 1997]. Dennis, Newman and Marsland [2005] have shown that, for women, enjoyment of shopping is driven less by location than for men, and this could explain why, if shopping is to be an enjoyable experience, women like to have a variety of location options available to them. Hence a weaker relationship of enjoyment with repatronage may be explained by the fact that for women to enjoy shopping they prefer a range of locations to consider when selecting a shopping destination.

If women see the availability of choice as adding to their pleasure in shopping, this would reduce their loyalty to a specific shopping location, without directly diminishing their enjoyment of the location. This concurs with Sivadas and Baker-Prewitt [2000] and Miranda, Konya and Havrila [2005], among others, who have shown that favourable evaluations of the shopping experience do not necessarily result in loyalty and repatronage, suggesting that other factors are involved in patronage choices. Due to their propensity to be decisive and saving time in shopping, men appear to show more loyalty in their shopping choices. Loyalty to a shopping location can be a mechanism to simplify the shopping process for men by reducing the confusion caused by too much choice [Bakewell and Mitchell, 2004]. This could explain the stronger relationship between enjoyment of the shopping experience and repatronage intentions for men than women.

Conclusions and Managerial Implications

The results of the analysis give clear theoretical and managerial implications. From a theoretical perspective, the research relates to prior work both regarding gender differences in shopping and influences on repatronage intentions. From a gender-related perspective, our results appear to refute the notion of the Savannah Hypothesis. Based upon this hypothesis, we expected the relationship between enjoyment and repatronage intentions to be stronger for women than men, as women enjoying shopping should see repatronage as an opportunity to extend their shopping experience, whereas men generally seek to keep shopping time to a minimum. This difference was based upon our expectation that there are clearly defined gender differences when it comes to shopping [c.f. Fischer and Arnold, 1994]. However, our results appear to support the notion that for men enjoying shopping, they indicate a stronger intention to return than do women.

This could raise potential issues for shopping centre management. Based on previous research, marketing management may be predisposed to ensuring that women enjoy their shopping experience and may target advertising and promotional activities more towards women than men. In fact, they may find that the same level of activity directed towards men could pay greater dividends in terms of repatronage. Perhaps we are seeing a change in the definition of shopping roles, and this could account for the unexpected results of our gender-based repatronage intentions hypothesis. Perhaps the approaches of men and women to shopping are changing due to the socialisation aspect of the activity [Severiens and Ten Dam, 1998]. The generation gap between young and mature male shoppers may be challenging traditional shopping motivations; ‘Younger males today are more accustomed to shopping and seem to gain more enjoyment out of it’ [Minahan and Beverland, 2005, p. 174]. Indeed, whilst earlier work confirmed the existence of well-defined gender shopping roles [Fischer and Arnold, 1994; Lavin, 1993] more recent work appears to refute these roles and appears more in favour of relaxed gender roles [Otnes and McGrath, 2001].

A major managerial outcome is the understanding that customers who enjoy their shopping intend to return to the shopping area in future. This raises a number of issues relating to repatronage intentions. Our results give indication that customers derive enjoyment from regional shopping experiences from their assessment of accessibility, atmosphere, environment, and shopping centre personnel. This result is similar to that provided by Wakefield and Baker [1998] who found that excitement has a positive influence upon repatronage intentions. It stands to reason then that if a shopping centre facilitates fast, efficient shopping, this would appeal to men, who would enjoy shopping in that region, and may therefore be more likely to return to the location in the future.

This research also has implications for managers of retail stores in regional shopping centres. There is a clear need for bodies such as local authorities and town centre managers to coordinate the shopping experience in these regional centres so that customers' enjoyment is maximised, in a similar way to how more discrete shopping centres, such as shopping malls or plazas, are managed [Kirkup and Rafiq, 1999]. This research provides a useful benchmark that retailers can use to manage the shopping experience. With increasing participation in shopping by male consumers who prefer to shop in a fast and efficient way, attention needs to be paid to making shopping centres easily accessible and attractive to this segment of shoppers. For example, mature male consumers prefer to shop by product type rather than brand [Minahan and Beverland, 2005]; therefore town centre managers could in the future seek to group stores by type in functional focused 'hotspots'; also providing clear directions, signage and customer information / advice points within the shopping centre [Laroche, Saad, Cleveland and Browne, 2000]. At the same time, since women comprise a higher proportion of the shopping population, there is a need to promote aspects of the shopping centre as a relaxing and fun leisure activity to increase female enjoyment of the shopping location, to retain these customers and increase the likelihood of repatronage.

Limitations and Future Research Directions

The nature of the scale in this paper indicates specific areas that customers use to judge their enjoyment of a shopping experience in regional shopping centres. However, in considering any research, it is important to evaluate the limitations of the work. First, this study is cross-sectional, measuring respondents' enjoyment of the shopping experience and intentions to repatronise at only one point in time. As such, conclusions regarding causal order amongst the variables of interest cannot be made, and care should be exercised when interpreting the findings.

Second, although this study has confirmed a number of variables relating to enjoyment of shopping locations, it may be likely that certain of these variables will be more influential than others in affecting levels of enjoyment and repatronage decisions. Further research could examine specific factors that customers use to judge their enjoyment of a shopping experience in regional centres. Further research would also be valuable in identifying other consumer segments than the ones identified by gender in this study, and to segment for example according to respondents' age or travel distance. Third, it should be noted that there are differences between intentions to repatronise and actual repatronage behaviours on the part of shoppers. Future work in the area could seek to examine whether intentions to repatronise a shopping centre translate into actual repatronage behaviours.

Fourth, we measured a limited number of variables in our work. There may be additional factors that could contribute towards shopping enjoyment. One possibility is that the quality and quantity of entertainment offered may influence enjoyment of the shopping experience. For instance, some shops or shopping centres provide additional entertainment during festive seasons (such as Christmas, Thanksgiving, or Easter). In this respect, seasonality aspects could also affect enjoyment of the shopping experience, and this issue warrants empirical study.

It is also the case that enjoyment of the shopping experience may impact upon more than just intentions to repatronise the centre. For instance, it could be argued that shopping enjoyment may influence the discretionary amount that shoppers are prepared to spend in a shopping trip; it is established that increased time spent in the retail environment results in higher spending [Donovan, Rossiter, Marcoolyn and Nesdale. 1994; Wakefield and Baker, 1998] thus enjoyment may increase duration of time spent on the shopping visit and spending potential. Willingness to spend more money or willingness to recommend the shopping centre to others are other potential outcome variables.

It is also important to consider the relationship between service quality and enjoyment and future work could seek to explain how these constructs specifically relate to one another. For example it is likely that certain aspects of shopping enjoyment may also impact on service quality perceptions. As such, the role that shopping enjoyment may play in shaping service quality needs to be investigated. For instance, perceptions of the shopping centre environment could have an impact on customers' feelings of assurance regarding the shopping centre as a whole. Consequently, it could be that effective management of the shopping environment itself could influence perceptions of service quality (e.g., at the store-level and more broadly in terms of the centre itself). Furthermore, it could be interesting to see how the concept of entertainment, as discussed by Sit, Merrilees and Birch [2003], relates to excitement, enjoyment and quality perceptions of customers, and how in turn it may influence repatronage.

Therefore, while our study provides important results for managers in shopping centres, we are encouraged that there is sufficient scope for further research into this area. Additionally, the research concentrated on aspects of regional shopping centres, which predominantly relate to the retail provision in these areas. Regional town and city centres are beginning to focus their marketing on a whole package of customer attraction which includes retail but also aspects such as entertainment, leisure facilities, hospitality and tourism. Future research into customer enjoyment and patronage could investigate how these aspects can also influence patronage decisions.

Finally, since the study was conducted in a specific region of the United Kingdom, it would be interesting to examine the stability of the results first nationally, and then cross-nationally. It may be that customers' enjoyment of the shopping experience could vary across geographic regions or international borders. Indeed, it is for this reason that there is a healthy stream of international consumer behaviour research. However, taking these limitations into account, we feel that the current study makes a significant contribution to the retail consumer behaviour literature and has identified a number of potential areas for future research into this important area of the literature.

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APPENDIX A

Items Measuring Dimensions of Location Attractiveness

Directions: *On a scale from 1 to 10, where 1 is the lowest and 10 is the highest score you can give, please rate the shopping area on the following statements*

ITEM(S)	DIMENSION
	Accessibility
The location of stores is convenient*	*Location*
There is adequate parking ***	*Parking*
Pedestrianised areas make it easy to get to move around **	*Pedestrianisation*
Travelling to shop here is easy and straightforward ***	*Travel*
	Atmosphere
The buildings in this place look attractive *	*Appearance*
The overall atmosphere makes shopping enjoyable **	*Atmosphere*
There is a good selection of cafés and restaurants * / **	*Food Stops*
There is an excellent variety of stores *	*Variety*
The window displays are attractive **	*Fashion / Style*
	Environment
The shopping area looks clean and tidy ***	*Cleanliness*
Shopping hours are convenient ***	*Opening Hours*
It feels like a safe place to shop ***	*Safety*
	Personnel
The service in the shops is good ***	*Customer Service*
The attitude of staff in the shops is helpful and friendly ***	*Staff Attitudes*

* Item adapted from Wakefield and Baker [1998]

** Item adapted from Oppewal and Timmermans [1999]

*** Item adapted from Sit, Merrilees and Birch [2003]

Conceptualising Town Centre Image and the Customer Experience

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Abstract

Compared with store image literature, the town centre is underexplored as a retail image context. This paper examines 'what is town centre image' by conducting an empirical study of 536 consumers to elicit top of mind images of five town centres. Following extensive content analysis and rigorous replication, the findings reveal a broader, holistic image construct than previously assumed in the literature. New psychological, intangible elements of town centre image are identified confirming the need to measure image specific to the retail context. Further, drawing on the customer experience framework, a conceptual model of town centre image is developed. The model provides the basis for future conceptualisation and operationalisation of town centre image, combined with an approach for managing the customer experience in town centres.

Summary statement of contribution

This study demonstrates contribution to retail marketing theory by:

1. Providing the first conceptualisation of holistic image in a town centre context, thereby emphasising the neglected, psychological elements of image.
2. Eliciting the salient dimensions and components driving town centre image, thus facilitating operationalisation of image.
3. Proposing a conceptual model of town centre image based on and integrated with the customer experience; which will enable stakeholders to develop management strategies using the identified town centre components.

Keywords: town centre, retail image, customer experience, place marketing

Paper 8. Conceptualising Town Centre Image and the Customer Experience

Introduction

Downtown and town centre shopping areas play a crucial role in the economic health of towns and cities worldwide and need to attract consumer patronage in order to survive and prosper (Robertson, 1999). However, competition for patronage has steadily increased, not only from out of town planned shopping centres and online shopping, but also from neighbouring cities and more distant shopping venues (Weltevreden & Van Rietbergen, 2007). Periods of economic downturn further reduce patronage, leading to store closures and unemployment. Since 2009 retailers have closed tens of thousands of stores across the US and Europe, with vacancies reaching an all time high (Grewal, Levy & Kumar, 2009). As store vacancies rise, the attractiveness of the shopping area reduces, changing the consumer's perception of that centre (Mullis & Kim, 2011; Whysall, 2011).

The consumer's image of a shopping area is an integral part of the consumer decision-making process, driving patronage and shopping centre equity (El Hedli & Chebat, 2009). Few retail stores exist in isolation and the success of each store is dependent upon the image of the total shopping area (Bell, 1999). A less positive centre image can result in reduced patronage and outshopping to competing centres (Miller & Kean, 1997; Mullis & Kim, 2011). Understanding the consumer's image of a centre thus becomes highly relevant to place marketers and centre managers, to differentiate the centre and to protect its long-term economic viability (Hart, Farrell, Stachow, Reed & Cadogan, 2007; Runyan & Huddleston, 2006).

The study of image in the retail environment is well documented in an extensive body of literature extending over 50 years (c.f. Stern, Zinkhan, & Jaju, 2001). It is acknowledged that store image influences consumers' patronage behaviour, and researchers have sought to conceptualise and measure consumer perceptions in order to manage and control image (Samli, 1998). Yet despite the strategic importance of town centres, surprisingly few empirical studies investigate the consumers' image of a town or city centre as a retail environment. Further, the conceptualisation of town centre image lags behind other image constructs, exposing an important research gap. Without clear understanding of the town centre image construct, successful operationalisation of image is impossible, inhibiting measurement, and hence hindering development of the ‘place brand’ and effective management of image for place marketing strategy. It may also be detrimental to developing the customer experience for town centre shoppers. Customer experience is increasingly recognized as a key factor in building retailer loyalty and success (Verhoef et al., 2009), and the relationship between customer experience and image has previously been noted (Berry, 1969; MacInnis & Price, 1987). However, customer experience in a wider retail environment is relatively under researched and therefore understanding the image of a town centre may, in turn, help strengthen the customer experience in that location.

This paper addresses the research gap by investigating what we mean by town centre image, utilising a customer experience perspective as a guiding framework. The study will benefit research, theory and practice in the following ways. First, a model of town centre image is proposed, facilitating image conceptualisation. Second, drawing from a study eliciting ‘top of mind’ image characteristics from 534 respondents, we identify new, consumer-generated dimensions and attributes driving town centre image, providing the basis for future operationalisation of this image construct. Third, the findings emphasise the neglected psychological, intangible elements of retail image and reinforce its holistic, gestalt nature. Fourth, evaluating the findings with extant literature identifies a broader construct than previously assumed in the literature, confirming the need to measure image specific to the retail context that is the town centre environment. We conclude by discussing how the image construct provides the basis for orchestrating ‘clues’ within the shopping environment to guide customers through the buying process and translates into practical strategies for managing the customer experience in town centres (Verhoef et al., 2009).

Literature review

Often termed the ‘High Street’ in the UK, town centres are nevertheless an international phenomenon. In Europe and elsewhere, the town centre delineates an area which is ‘central to the town as a whole, which … forms the most important retail area in the town … [and] also serves a wider purpose as a business, cultural and entertainment focus for the community' (Guy, 1994, p. xvi). While in North America the downtown no longer occupies the highest level of the retail hierarchy, it nevertheless maintains a significant role as a shopping destination for consumers who choose to shop there (Padilla & Eastlick, 2009; Sneed, Runyan, Swinney & Lim, 2011).

The context for town centre image emerges from two strands of literature. (1) Spatial shopping behaviour, including classical geographic theories such as Central Place Theory (Christaller, 1933) or gravity type models based on the attraction and mass of a centre versus distance (Huff, 1963; Reilly, 1929); and (2) research into perceptions of composite measures of town centres, or image (e.g. Bell, 1999; Nevin & Houston, 1980). Both strands ultimately seek to predict consumer patronage of retail locations. However, while offering some theoretical and methodological consistency to patronage research (Bell, 1999), the geographic approach is criticised for its broad, unrealistic assumptions regarding shopping behaviour (Timmermans, 1981). Instead, researchers suggest that subjective impressions in the form of image related dimensions ameliorate the impact of distance (Bell, 1999; Bucklin, 1967).

Yet despite its importance, the literature on town centre image remains limited in comparison to store and mall image. Researchers have for over 50 years studied the store image construct based on Martineau (1958)'s definition of image as both tangible and intangible dimensions, or "the way in which the store is defined in the shopper's mind, partly by its functional qualities and partly by an aura of psychological attributes" (p. 47). Most influential has been Lindquist (1974)'s meta analysis which established nine core dimensions of store image (merchandise, service, clientele, physical facilities, convenience, promotion, atmosphere, institutional factors and post-transaction satisfaction). Further, the mall image literature evidences a research stream focused on atmospherics in terms of ambient odour, music and colours (e.g Michon, Chebat & Turley, 2005) and excitement (Wakefield & Baker, 1998). Subsequent researchers have explored the psychological aspects of store image, hypothesizing that image has affective or emotional content (Darden & Babin, 1994; Mazursky & Jacoby, 1986) and speculated as to its holistic, gestalt nature (Dichter, 1985; Keaveney & Hunt, 1992).

In contrast, relatively few studies specifically research town centre image as a distinct entity. A number of authors compare consumer perceptions of a town centre with shopping malls (e.g. Howell & Rogers, 1980; Leo & Philippe, 2002; Nevin & Houston, 1980). Other studies survey the town centre as a collective of 'shopping centres' in a geographic area without distinguishing between different shopping formats, such as urban agglomerations or in town malls (e.g. Bell, 1999; Gentry & Burns, 1977; Hunter, 2006). Consequently, a key shortcoming of the literature is the lack of empirically established image variables pertinent to the town centre environment. Due to the scarcity of town centre specific measures, researchers regularly transfer or adapt store image variables. Indeed, a number of authors (e.g. Bell, 1999; Gentry & Burns, 1977; Hunter, 2006; Nevin & Houston, 1980) base their image research on measures adapted from Lindquist's (1974) synthesis of store image literature. This store image structure of nine dimensions, containing 32 component attributes, generates considerable influence on town centre studies. Table 16 includes studies that research image aspects of a downtown or town centre and lists the component attributes employed. It is noticeable that the majority of town centre attributes overlap with many of the original store image attributes identified by Lindquist (1974).

Table 16 Town centre attributes in the literature

	Range / quality of shops	Range / quality of goods	Price / value	Style / fashion	Shopping hours	Personnel / service quality	Size	Location / traffic / travel convenience	Parking	Structure and design / layout	Ease of internal movement / compactness	Crowding	Visual appearance	Buildings / landscaping	Advertising / promotions	Activities/ special events	Atmosphere	Busy	Cleanliness	Old / new	Personal / friendly	Lighting	Temperature	Safety	Self-image congruency / other customers	Reputation	Refreshments / comfort areas / facilities	Place to spend time / take children	Non-retailing functions
Lindquist 1974		x	x	x		x		x	x	x	x		x	x	x		x			x					x	x	x		
Downs 1970	x	x	x		x	x			x	x	x		x				x	x	x		x					x			
Gentry & Burns 1977	x	x	x		x	x		x	x					x	x				x						x	x			
Hauser & Koppelman 1979	x	x	x			x			x	x						x	x									x			
Nevin & Houston 1980	x	x	x	x		x			x	x					x	x	x										x	x	
Howell & Rogers 1980		x		x	x	x		x	x		x		x	x	x		x		x										
Gautschi 1981	x	x	x		x			x	x	x	x	x							x					x	x				
Timmermans et al 1982	x	x	x			x	x	x	x	x	x		x		x	x	x	x	x	x	x	x	x	x		x		x	x
van Raaij 1983	x					x		x	x	x	x	x				x	x		x					x	x				
Wee 1986	x	x	x	x	x	x		x	x	x	x			x					x	x		x		x			x	x	
Feinberg et al 1989	x	x			x												x		x		x					x		x	
Hackett & Foxall 1994	x	x	x			x		x	x	x	x		x		x				x				x	x			x	x	
Bell 1999	x	x	x	x	x	x		x	x		x		x													x			
Oppewal & Timmermans 1999										x	x	x	x			x			x								x		
Leo & Philippe 2002	x	x	x	x	x			x	x	x		x	x	x				x						x		x		x	
Kupke 2004	x		x		x	x			x								x										x		
Hunter 2006	x	x	x	x		x			x	x					x	x	x										x	x	
Teller & Elms 2010	x	x	x			x		x	x		x		x				x		x			x	x				x		

Attributes are defined as ‘the narrowest, most specific constructs’ of image, and dimensions refer to the ‘most general constructs’ containing groups of attributes (Hansen & Deutscher, 1977 p. 59). Table 17 lists image dimensions identified in town centre studies. While some of Lindquist (1974)’s nine store image dimensions are recognizable in town centre image studies, here the literature diverges. Notably, the order and number of town centre dimensions vary considerably from three to nine, with limited consistency between the terminology and meaning of these dimensions. While assortment appears the most regularly cited image dimension, its interpretation is unclear in this context; do consumers evaluate individual goods or stores, or the total number of stores in a shopping centre? (R. M. Downs, 1970). Similarly, atmosphere features strongly in the image literature. However, perceptions of atmosphere are likely to vary between a created, controllable environment such as a store or mall where atmosphere is manipulated through sounds, smells and décor (Baker, Grewal, & Parasuraman, 1994; Michon et al., 2005), compared with an evolved environment such as a town centre that is less controllable. The remaining image attributes used in the town centre studies show inconsistency across studies. For example, authors less frequently mention size, crowding and busyness. Hence, the literature demonstrates neither agreement for the salient dimensions of town centre image, nor any consistent ‘taxonomy’ of dimensions or attributes with which to measure town centre image (Bell, 1999, p. 68).

Furthermore, studies using store image related measures to assess urban patronage deliver conflicting results. Authors find that dimensions explaining patronage in shopping malls differ from those in town centres (Hackett & Foxall, 1994; Leo & Philippe, 2002). Further, Nevin and Houston (1980) and Feinberg, Sheffler, Meoli and Rummel (1989) find their derived image dimensions are less successful in predicting patronage of shopping malls than for town centres. Hence, dimensions that are effective in measuring store or mall image may not consistently transfer to town centres.

Table 17 Dimensions of town centre image identified in the literature

Downs (1970)	(1) Service quality, (2) price, (3) structure & design, (4) hours, (5) internal pedestrian movement, (6) shop range & quality, (7) visual appearance, (8) traffic conditions, (9) *atmosphere**
Gentry and Burns (1978)	(1) Price, variety, product quality / stores, (2) parking, traffic, (3) buildings, customers, (4) hours, advertising
Hauser and Koppelman (1979)	(1) Variety, (2) quality & satisfaction, (3) value, (4) parking.
Nevin and Houston (1980)	(1) Assortment, (2) facilities, (3) market posture
Howell and Rogers (1980)	(1) Atmosphere, (2) personnel, (3) fashion shopping, (4) advertising, (5) convenience, (6) accessibility, (7) *proximity*
Gautschi (1981)	(1) Transport, (2) assortment, (3) design, (4) *prices,* (5) hours, (6) *dress*, (7) *crowds*
Timmermans et al. (1982)	(1) Size of assortment, (2) accessibility, (3) atmosphere, (4) physical layout
Van Raaij (1983)	(1) General evaluation, (2) environment, (3) efficiency, (4) accessibility, (5) social
Wee (1986)	(1) Assortment, (2) facilitative, (3) maintenance, (4) operational
Feinberg et al. (1989)	(1) Sales people, (2) merchandise, (3) reputation, (4) atmosphere, (5) social experience
Hackett and Foxall (1994)	(1) Service quality, (2) access / facilities, (3) social, (4) choice & variety
Bell (1999)	(1) Product & store range & quality, (2) customer service, (3) visual amenity, (4) *convenience*, (5) *price fairness*
Leo and Philippe (2002)	(1) Retail mix, (2) environment, (3) accessibility, (4) *price*
Kupke (2004)	(1) Parking, (2) price, (3) atmosphere, (4) service, (5) food facilities, (6) range of shops, (7) hours

**Italics denote insignificance*

While most town centre studies survey consumer perceptions, surprisingly few researchers elicit town centre specific attributes direct from the consumer. Yet, authors argue that image measures based on attributes pre-specified from other contexts might result in the omission of attributes that are relevant to consumers, or the inclusion of attributes that are irrelevant to their perceived image (Gautschi, 1981; Zimmer & Golden, 1988), representing the researcher’s assumptions, rather than the reality of consumers’ individual image perceptions (Keaveney & Hunt, 1992).

The diversity of the town centre environment and the way consumers experience this, suggests a wider, multifaceted image construct. Town centres are complex environments comprising extensive retail and non-retail functions including housing, education, health, employment, leisure and entertainment, and public services (Warnaby, Bennison, Davies, & Hughes, 2002). They provide a diverse and interesting shopping experience due to unique features such as historical buildings and related themed areas (Padilla & Eastlick, 2009; Robertson, 1997; Runyan & Huddleston, 2006). These features lead to a sense of attachment to the community, which the downtown represents (Runyan & Huddleston, 2006). Consumers identify with individuals and social groups when they shop in a town centre, potentially forming links and reciprocal obligations towards their community as a whole (Miller & Kean, 1997). Thus, town centres are likely to hold more personal meaning to consumers through habituation and familiarity than simply performing as a shopping destination (Relph, 1976). Accordingly, authors suggest town centre image includes a broader domain of attributes than captured in store image studies, which ignore the characteristics of the wider public and social environment surrounding the town or city centre (Oppewal & Timmermans, 1999). Hence, adapting store image attributes and dimensions may not adequately capture the ‘total impression’ the town centre makes on consumers’ minds (Dichter, 1985).

A final observation refers to the domain of the image construct. Bell (1999) suggests that consumers are likely to adopt a holistic approach to town centre image perceptions. The holistic view of image is presented as a ‘gestalt’ or overall impression into which the dimensions of a location’s image are integrated to form individual, subjective perceptions (Hartman & Spiro, 2005; MacInnis & Price, 1987).

Alternatively, image is interpreted as an abstraction simplifying complex information (Keaveney & Hunt, 1992; Mitchell, 2001). As such, a gestalt image may instead represent ‘a couple of ideas rather than an array of individual, specifically focused attributes’ which could include evaluations, global perceptions or overall impressions, as opposed to a summary of its dimensions (Zimmer & Golden, 1986, p. 287). Despite this, researchers predominantly measure the tangible, functional dimensions of town centre image, with little attention given to intangible elements such as consumers’ psychological beliefs and attitudes or the holistic approach to image (Bell, 1999). Moreover, researchers have not yet established what exactly the holistic, gestalt notion of town centre image consists of (Stern et al., 2001).

Thus the literature exposes a fundamental gap in the conceptualisation and operationalisation of town centre image. Existing image measures comprise a combination of (a) measures that are relevant and used, and (b) measures that are used but are irrelevant to that image context. However, a third group emerges: (c) measures which are potentially relevant but not considered to date. With limited understanding of the latter two groups, it is unclear if existing studies actually measure what consumers perceive as the image of a town centre. Fundamentally, these measures may provide a false picture of the town centre for managers and marketers, undermining the effectiveness of marketing strategy.

Customer experience

In order to understand the measures specific to town centre image, an important priority for research is to develop an appropriate conceptual underpinning. However, the diverse nature of town centre image needs to consider the wider context in which it operates. Customer experience has been identified as an important factor in the formation and enhancement of retail image (MacInnis & Price, 1987). Berry (1968, p. 24) states that ‘an image is acquired through experience and thus is learned’, therefore the customer experience research stream may provide a suitable conceptual framework for town centre image. There has been increasing academic attention focussed on the consumer shopping experience and the notion of managing the customer experience in order to create value for customers (Berry, Carbone, & Haeckel, 2002). Recent literature defines customer experience as the consumer’s ‘internal and subjective response’ to any direct / indirect contact with a retail location (Meyer & Schwager, 2007, p. 118). This contact spans experiences in retail stores and across all channels, and is 'holistic in nature' (Verhoef et al., 2009). From a retail perspective, the customer experience can begin with the journey to the store (Gilmore & Pine, 2002) and thus the shopping location becomes part of the experience. Conceptualised in a retail or services setting, the customer experience entails a personal involvement at different levels, identified as cognitive / physical, sensory / affective, and social (Gentile, Spiller & Noci, 2007; Schmitt, 1999; Verhoef et al., 2009). The four levels of customer experience potentially overlap with notions of image in interesting ways and suggest a theoretical framework within which the town centre image concept may be understood.

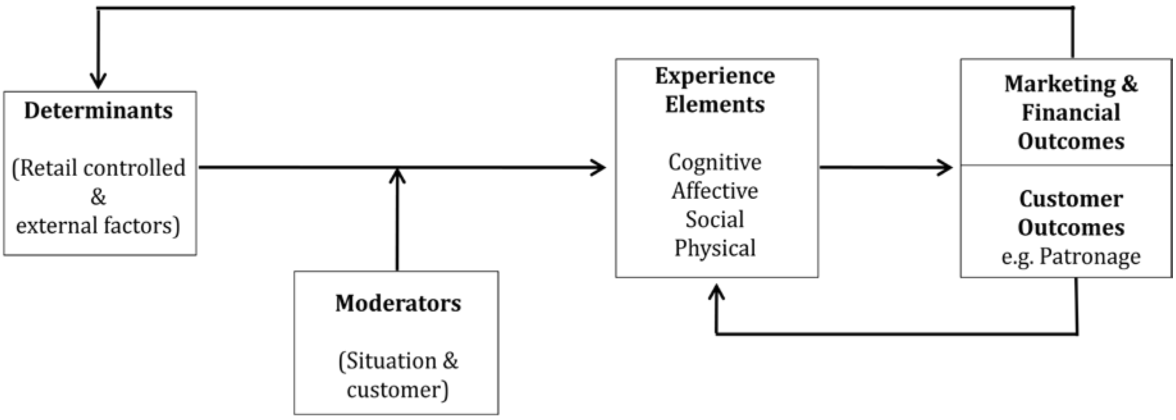
First, cognitive and physical evaluations feature prominently in retail image studies and are strongly associated with patronage (Darden & Babin, 1994; Gauri, Trivedi & Grewal, 2008). Consumers experience the physical environment through cognitive processing of information derived from its tangible characteristics, or stimuli that activate knowledge structures (MacInnis & Price, 1987; Stern et al., 2001). Given that image 'simplifies complex information' (Mitchell, 2001, p. 167), these knowledge structures contain elements in the physical environment, such as the range of stores and goods, accessibility and parking, entertainment and refreshments, street layouts and architecture, which may be salient to consumers. Where the consumer perceives these elements more favourably, it is likely to lead to greater patronage (Puccinelli et al., 2009).

Second, at a sensory and affective level, consumers experience the retail environment in ways that involve their senses and emotions (Darden & Babin, 1994; Oxenfeldt, 1974; Schmitt, 1999). The influence of atmosphere on consumers' image is evident in store and mall contexts, and research suggests that the interaction of various atmospheric stimuli will strongly influence patronage behaviour (Baker, Parasuraman, Grewal & Voss, 2002; Michon et al., 2005; Wakefield & Baker, 1998). Darden and Babin (1994) show that retail environments evoke emotional responses such as pleasure, energy and sleepiness, which in turn, influence patronage in complex ways (Laroche, Teng, Michon, & Chebat, 2005; Machleit & Eroglu, 2000). In addition, consumers seek entertainment and excitement in a shopping experience (Sit, Merrilees & Birch, 2003; Wakefield & Baker, 1998). The numbers and density of other shoppers also contribute to feelings of vibrancy and vitality in a town centre (Oppewal & Timmermans, 1999; Ravenscroft, 2000). Affect influences patronage through mood, since consumers shop for longer and spend more when they are feeling positive; through evaluation, in that a more positive emotion results in a more positive evaluation of a retail experience and are more likely to return; and post-purchase satisfaction so they are more likely to recommend (Puccinelli et al., 2009). Hence, consumers with a more positive affective image are likely to demonstrate increased patronage.

Finally, the social environment and the consumer's perceived relationship with the place and other people influence the image formed. Brand image theory suggests that image has a social aspect which associates a consumer with a desired group, role or self-image (Park, Jaworski and MacInnis, 1986). Consumer attitudes and behaviour are often determined by perceptions of typical shoppers, as compared to consumers' own personal images (Sirgy et al., 1997; Verhoef et al., 2009). A consumer who perceives his/her self-image as congruent with that of other shoppers is believed to view a shopping area more favourably (Sirgy et al., 1997; Sirgy & Samli, 1985), leading to greater satisfaction with the customer experience and hence increased patronage (Verhoef et al., 2009). Consumers who enjoy the social element of the customer experience are likely to shop more frequently in that location and therefore develop greater familiarity with it (Haytko & Baker, 2004; Miller & Kean, 1997). Familiarity in part stems from feeling comfortable in the environment due to more frequent interaction, increased trust and identification with other people who are perceived as similar (Haytko & Baker, 2004; Line, Runyan, Costen, Frash & Antun, 2012). In a consumer's home town location, familiarity may result in a sense of attachment to the community through social identity and social capital (Miller, 2001). The social nature of the customer experience leads to the likelihood the group members will communicate their perceptions of the town centre to others (Granovetter, 1985; Line et al. 2012). If these are favourable, such positive word of mouth recommendations will enhance the reputation of the location (Brown, Barry, Dacin & Gunst, 2005; Dick & Basu, 1994).

Figure 14 synthesises the customer experience literature in a generic model of retail customer experience. Accordingly, the emerging customer experience literature provides a framework within which to contextualise dimensions of town centre image. Indeed, the levels of customer experience (cognitive / physical, sensory / affective and social) provide a starting point for developing a holistic conceptualisation of image that may play a role in shaping patronage behaviour.

Figure 14 Generic model of retail customer experience
Adapted from Grewal et al., (2009) and Verhoef et al., (2009)



With this in mind, the main objective of this study is to investigate and provide an answer to the question of 'what is town centre image'. Specifically, we first examine the composition of town centre image by eliciting consumer generated attributes and dimensions, which will facilitate the development of a conceptual model. Second, an associated objective for this research is to establish which image attributes are relevant to town centres and which may be redundant to this context. Third, recognising the importance of managing the customer experience in the retail environment, we conceptualise town centre image using a framework based on the customer experience.

Method

To capture consumers' perceptions of town centre image, a content analysis methodology was adopted. The methodology was adapted from Zimmer and Golden (1988) who used unstructured methods to elicit consumers' unprompted image responses, avoiding any specification bias related to researcher-imposed questioning (Zimmer & Golden, 1988). Unstructured methods are more flexible in generating detailed responses, including new, unexpected and 'non-fitting' responses, which are potentially the most interesting in extending the conceptualisation of image (Keaveney & Hunt, 1992). Further, these methods enable respondents to give 'aggregate' or holistic responses, which are better suited to interpreting the meaning consumers attach to the complexity of an environment (Stern et al., 2001, p. 220). Hence, this method is particularly conducive to identifying the holistic content of town centre image.

Sample and data collection

An intercept survey of 536 consumer respondents was conducted in seventeen towns and cities across the East Midlands region in the UK representing 1.4 million inhabitants. The overall sample was approximately 61% female and 39% male, aged between 16 and 66. Females between 16 and 25 and 36 and 45 years of age made up the largest proportion of the total sample (21.1% and 21.5% respectively). Most males were between 26 and 35 and 46 and 55 (14.7% and 16.4% of the total sample respectively). A total of 36% of respondents had children, and 62.3% were employed. The sample was predominantly Caucasian (89.7%).

To avoid bias towards specific attributes, we asked consumers 'please give your overall impression of the following, as places for shopping' (adapted from Zimmer & Golden, 1988). The question aimed to capture consumers 'top of mind' spontaneous descriptors, which are believed to contain the most salient image perceptions (Woodside & Trappey, 1996) and was placed immediately at the start of a separate survey. Five cities of varying size in the region provided cues for the responses, with the majority of respondents believed to have awareness of two or more of these. Each respondent could give as much or as little information as required. A pretest of 10 consumers in one town centre confirmed the clarity of the wording for all respondents with no ambiguity reported. Trained Market Research Society (MRS) interviewers administered the survey as part of a commissioned study into retailing in the region, and intercepted shoppers during normal shopping hours in central locations.

Content analysis

The responses thus generated were analyzed using content analysis to establish the frequencies with which respondents' statements could be located within designated categories, and to assess their relative importance. All responses were aggregated into a single dataset, since it was not the purpose of the research to determine the image of each individual city, rather to identify the types of statements consumers use when perceiving town centre image. Responses were listed as individual words or phrases containing a single idea, generating 2013 image statements in total.

The purpose of content analysis is to reduce a large number of words or phrases to a smaller number of meaningful categories (Weber, 1990). Accordingly, one researcher initially reduced the total number of responses (2013) by grouping similar or identical responses (such as 'choice' and 'selection', 'hard' and 'difficult') into themes each containing one individual idea. This process generated 432 distinct themes relating to consumers' perceptions of town centre image. To minimise researcher bias in the analysis and to ensure reliability in the results, independent coders were trained and an iterative process of analysis and replication was carried out (Krippendorff, 2004; Weber, 1990). A coding template was prepared from the list of 29 attributes in Table 16 identified in the town centre literature. Then six coders, who were research assistants or academics in areas outside of retailing, were instructed to independently code as many of the 432 themes as possible into the 29 categories in the template. Although individual totals varied, coders allocated approximately 70 per cent of the 432 themes (representing an average of 1250 statements each) to a category. The remaining statements (representing around 760 statements or 144 themes) were not considered to 'fit' any of the categories currently existing in the literature.

The coders were informed that the 'non-fitting' responses were considered equally of interest since they might provide a more complete explanation of the image construct (Keaveney & Hunt, 1992, p. 167). The 'non-fitting' themes were discussed with the coders who were asked to suggest additional categories, into which they believed these non-fitting themes might fit. A number of common categories emerged which were discussed by the authors and the coders until agreement was reached on their exact labeling. As a result eight additional categories were created which were labelled as: ‘named shopping locations’, ‘named stores’, ‘character and tradition’, ‘familiarity’, ‘boring / exciting’, ‘comparisons with other places’, ‘likes and dislikes’, and ‘positive and negative overall comments’. Furthermore, due to some reported confusion among coders about the ‘non-retailing functions’ category in Table 16, responses to this category were grouped into two separate new categories: ‘leisure / services’, and ‘entertainment venues’. In all, ten new categories were created to capture the ‘non-fitting’ responses which were added to the template, resulting in 38 categories (see Table 18, column 4 for the final list of 38 categories). Statement frequencies were totalled for each category.

A second phase of content analysis then followed. Two research assistants, working independently, re-entered the 432 themes into the expanded template. The results from these two coders were tested for inter-rater reliability. The most commonly used measure of inter-rater reliability is the percentage of coder agreements to the total number of coding decisions (Kassarjian, 1977). However, this measure may include agreements, which are reached by error or chance; hence, agreement was assessed as a function of an assumed true level of reliability (Bitner, Booms, & Mohr, 1994; Perreault & Leigh, 1989; Rust & Cooil, 1994). Perreault and Leigh (1989)’s formula for inter-rater reliability (I) is represented by the equation:

$$I = \{[F/N - (1/K)][K/(K - 1)]\}^{0.5}$$

where F is the observed number of agreements between coders, N is the total number of judgments made, and K is the number of categories into which items are placed (the values of I falling between 0 and 1 with higher values representing greater reliability).

Initial results achieved agreement of 0.847 between the two coders. Discrepancies were discussed between the coders (Bitner, Booms, & Tetreault, 1990; Boivin, 1986) and the discrepant themes were re-assigned into the coding scheme. This time the level of agreement reached 0.976, with 21 themes still unable to be agreed. This level of agreement was considered sufficiently high ($I > 0.9$) (Perreault & Leigh, 1989), however since all themes were of interest the principal author independently selected the most appropriate category for these themes (Bitner et al., 1994). In this way, all 432 themes were allocated to categories. The resulting categorisation revealed that some categories contained large numbers of responses, whereas others characterised by lower frequencies; two categories obtained from the literature contained no items at all.

The authors then independently grouped the final 38 categories into a set of dimensions. All categories were included, regardless of frequency of mention. Using an iterative process of analysis and discussion, agreement was reached so that eight dimensions captured all 38 categories. These were agreed as retail assortment, global impression, atmosphere, accessibility, layout / scale, visual appearance, non-retail activities and place attachment (see Table 18, column 1). Next, a substantive validity test was carried out to determine the extent to which each category is deemed to fit with its expected dimension (Anderson & Gerbing 1991; Holden & Jackson, 1979). The test is particularly advantageous in determining validity in small samples such as in this study (Anderson & Gerbing, 1991). The test was conducted by thirteen graduates in areas unconnected to retail, who were provided with definitions of the 38 categories and the eight dimensions, with instructions to enter each of the categories into one of the dimensions. The resulting information was measured using the substantive validity coefficient (Csv), where Csv = (nc – n0) / N, and nc = the number of coders assigning a category into the expected dimension; n0 = the highest number of times that the category was assigned to a dimension other than the expected one; and N = the total number of coders. The values for Csv range from -1 to 1, where a higher value represents greater validity and a negative value indicates the category is deemed to belong to another dimension.

The Csv scores were calculated for each of the 38 categories, and then aggregated for the eight dimensions. Two categories (‘advertising / promotions’, ‘shopping hours’) totaled zero statements during the allocation process and were eliminated. Two other categories (‘service quality’ and ‘place to spend time’) received negative scores without any clear alternative dimension indicated. The three service quality statements related to stores rather than the centre as a whole. The literature suggests that ‘a place to spend time’ is a more nebulous construct. As a result, the latter two categories were eliminated. Following their omission, the Csv scores were re-calculated. Scores across all dimensions were > 0.5 giving confidence that the eight dimensions reliably represent the construct of interest, namely town centre image.

Results

In response to the broad research question of ‘what is town centre image?’ the content analysis results suggest that town centre image can be represented by seven dimensions, and one dimension, which appears to operate at a higher level, representing global impressions. Importantly, three of these dimensions are new to the literature, namely global impressions, non-retail activities and place attachment. Additionally, the three dimensions of retail assortment, atmosphere and appearance, while recognised in the literature, exhibit different constituent elements for this image context. These will be described in turn below.

Referring to Table 18, the most prominent dimension is assortment, based on the number of respondent statements. However, the characteristics that describe the assortment dimension in the context of town centre image are qualitatively different to the literature. The ‘range and quality of shops’ is the dominant category (n=421) compared with the ‘range and quality of goods’ (n=56) which feature strongly in the town centre image literature. Interestingly, a new category of ‘named shopping locations’ emerged, referring to specific shopping streets, in-town shopping malls, markets or stores in the town centre. A further category ‘named stores’, also resulted from the content analysis whereby respondents named specific anchor department stores and individual retailer brands in relation to that town centre.

Although often included in town centre image studies, comments relating to ‘price / value’ and ‘style / fashion’ were less numerous. These categories may not refer to the town centre as a whole, but rather to individual stores. Similarly, the categories of ‘advertising / promotions’, ‘shopping hours’ and ‘service quality’, regularly included in town centre image studies received very few mentions. Advertising may be perceived as focused on store promotions, while efforts to promote the town centre as a whole remain unnoticed by shoppers. Shopping hours, while a previous town centre attribute, are perhaps assumed by consumers, whereas mall opening hours may vary, being manipulated by management to suit consumers and location. Thus, these categories appear more applicable to the store image or mall image than town centres. The category of ‘refreshments, retail related facilities’, scored a low but positive Csv score which just secured it within the assortment dimension. Therefore, in town centre image, assortment encompasses the entire range and quality of retail provision such as stores (multiples, independent traders), specific groups of retailers (in streets, shopping malls and markets), together with the goods they sell, and including services and facilities which support the shopping process.

Table 18 Dimensions of town centre image and experience following Csv tests

Dimension	Total no of statements	dimension % of total	Category	statement frequency	statements % of total	csv score per category
Retail assortment	654	32.49	Range / quality of shops	421	20.91	1.00
			Named shopping locations (malls, streets, markets)	89	4.42	0.54
			Range / quality of goods	56	2.78	1.00
			Price / value	28	1.39	0.38
			Refreshments / retail-related facilities (cafes, seats)	22	1.09	0.08
			Style / fashion	18	0.89	0.38
			Named stores	17	0.84	1.00
			*Service quality**	3	0.15	-0.15
			*Advertising / promotions**	0	0.00	0.23
			*Shopping hours**	0	0.00	0.15
Atmosphere	181	8.99	Busy	78	3.87	0.62
			Crowding	32	1.59	0.77
			Boring / exciting	30	1.49	0.46
			Safety	12	0.60	0.15
			Atmosphere	11	0.55	1.00
			Personal / friendly	10	0.50	0.31
			Senses (temperature, noise)	8	0.40	1.00
Accessibility	179	8.89	Location / travel (convenience, traffic)	144	7.15	1.00
			Parking	35	1.74	0.85
Layout/scale	158	7.85	Size	60	2.98	0.69
			Structure and design / layout (under cover, pedestrianised)	54	2.68	0.77
			Ease of internal movement (compact, easy to get round)	44	2.19	0.54
Appearance	135	6.71	Visual appearance	50	2.48	0.77
			Cleanliness	33	1.64	0.54
			Character / tradition (historic, olde worlde)	26	1.29	0.08
			Old / new (modern, deteriorated)	18	0.89	0.46
			Buildings / landscaping	6	0.30	1.00
			Lighting	2	0.10	0.77
Non-retail activities	117	5.81	Leisure / services (administrative, tourist attractions, sports)	54	2.68	1.00
			*Place to spend time/ "day out"**	23	1.14	-0.31
			Activities/ special events (Xmas, Ramadan)	20	0.99	0.38
			Entertainment venues (bars, clubs, theatre, night life)	20	0.99	0.77
Place attachment	106	5.27	Familiarity (my home town, always shop here)	66	3.28	0.85
			Other people	34	1.69	0.62
			Reputation	6	0.30	0.23
Global impressions	483	23.99	Descriptors (good, brilliant, appalling)	339	16.84	0.85
			Likes / dislikes (I like it, my favourite, disappointing)	100	4.97	0.46
			Comparisons (not as good as ..., better than...)	44	2.19	0.62
				2013		

** problematic categories omitted from final calculations*

Atmosphere consistently features in the retail marketing literature (Kotler, 1973) and the results of the content analysis confirm this as a core dimension of town centre image. The most significant categories within this dimension were the linked themes of 'busy' and 'crowding', frequently in terms of 'too busy' or 'overcrowded'. The remaining categories representing atmospheric conditions include lighting, temperature and noise. The content analysis produced a further category labelled 'boring / exciting', expressed in terms of 'fun', interesting' or 'nothing happening', not previously included in town centre studies but evident in the mall image literature (Sit et al. 2003; Wakefield & Baker 1998). In addition, coders allocated 'personal / friendly' within this dimension, reinforcing the literature; for example Nevin and Houston (1980) considered atmosphere as 'friendly', and R. M. Downs (1970) included items based on a 'busy, relaxed and personal atmosphere'. In sum, atmosphere in a town centre represents how consumers experience and interpret the sensory and affective aspects of the environment.

Representing aspects of travel and access to the town centre, the accessibility dimension confirms that consumers include distance and travel costs in their town centre image perceptions; although distance travelled appeared less relevant than factors inhibiting access to the shopping area (e.g. traffic congestion and parking). This dimension features in the town centre image literature (R. M. Downs, 1970; Gautschi, 1981; Timmermans, van der Heijden and Westerveldt, 1982) and supports the distance variable in the attractiveness and patronage literature (Bell, 1999; Leo & Phillipe, 2002). The provision of 'easy', 'plenty' and 'inexpensive parking' was mentioned by respondents and is regarded an important factor in town centre patronage (Bell, 1999; Wee, 1986), considering that out of town malls provide easy access and free parking.

A separate dimension of layout / scale emerged to distinguish internal mobility from external access to the town centre. Some image studies combine accessibility with internal movement within the centre in one dimension (R. M. R. M. Downs, 1970; Hackett & Foxall, 1994; Nevin & Houston, 1980). However, the responses, coders and Csv scores all suggest that consumers evaluate external accessibility as a separate variable to internal mobility. Layout refers to the ease of physical movement by consumers within the town centre. Linked to this are the scale, or perceived size and spread of the centre; whether it is compact and easy to negotiate or spread out. Respondents also referred to the structure and design of the town centre as encompassing enclosed, indoor or open aspects, and pedestrianised areas.

The visual appearance of centres features to a lesser extent in the town centre literature. While the appearance of buildings is more commonly included in town centre measures, here this dimension includes cleanliness, lighting and age, rather than the architecture of individual stores. Notably, a new category of ‘character / tradition’ indicates that consumers respond to aesthetic appeals based on history and tradition in the town centre. This finding reinforces the notion that historical architecture, although not always visible at street level, nevertheless plays an important role in distinguishing and differentiating town centres to consumers (Sharp, 1968; Warnaby, 2009).

Critically, and of great interest, are the final three dimensions representing town centre image which emerge from the data: ‘non-retail activities’, ‘place attachment’ and ‘global impressions’. These dimensions do not feature in town centre image studies to date. The dimension labelled ‘non-retail activities’ was allocated to a separate dimension but is complementary to retail provision. Respondents consider these activities an important part of town centre image, referring to entertainment venues such as bars, clubs, theatre and nightlife, together with leisure and sports venues, visitor attractions, administrative functions and workplaces. These reflect the wider purpose of the centre beyond retailing. The category ‘a place to spend time’ has been included in the literature (Hackett & Foxall, 1994; Leo & Philippe, 2002; Nevin & Houston, 1980) and is linked to this dimension as providing wider entertainment for shoppers. However, this notion proved less clear in the analysis, and is thus omitted from the final image dimensions.

The smallest dimension - ‘place attachment’ - captured the sense of personal attachment or belonging to the place where consumers shop frequently. This dimension contained comments involving familiarity and frequency of patronage, for example ‘I always shop here’, ‘it feels comfortable’ and ‘my home town’. When a town centre was less familiar to respondents, they referred to the town or city's reputation, demonstrating knowledge gained through secondary sources rather than first hand. Perceptions of other shoppers also contributed to a sense of attachment to the town centre.

The most significant new dimension emerged from respondents' global impressions of the town centre and comprised nearly one quarter of all respondent statements. Within this, the largest category comprised simple descriptors describing the town centre positively or negatively, for example 'good', 'bad', 'gorgeous', or more expressive comments such as 'excellent', or 'appalling' summarising their perceptions of the town centre. A further category listed subjective attitudes relating to likes or dislikes; for example 'enjoyable', 'disappointing' and 'my favourite'. The third category included comparisons between the town centre and other known locations, for example 'looks poorer than X', 'better than my home town' and 'needs to catch up with other towns and cities'. Comments such as 'same as all towns' and 'best shopping centre' also suggest that consumers form prototypes or abstract typical town centre examples. These holistic responses echo the overall impressions identified by Zimmer and Golden (1988)'s image study findings, and were allocated to a new dimension created as a result of this analysis labelled 'global impressions'.

Discussion

The objectives of this study were to identify what is town centre image, and to develop a conceptual model, which explores town centre image in the wider context of the customer experience. Building on the generic model of retail customer experience introduced in Figure 14, the results are discussed in relation to these objectives in the following section, and describe the conceptual model presented in Figure 15.

The findings imply a town centre image construct that is 'a composite of beliefs held by a consumer on a number of dimensions' (Houston & Nevin, 1981, p. 678), in which certain dimensions are functional and tangible, and others psychological and intangible (Lindquist, 1974; Martineau, 1958; Mazursky & Jacoby, 1986), with a further dimension operating at a higher level of abstraction.

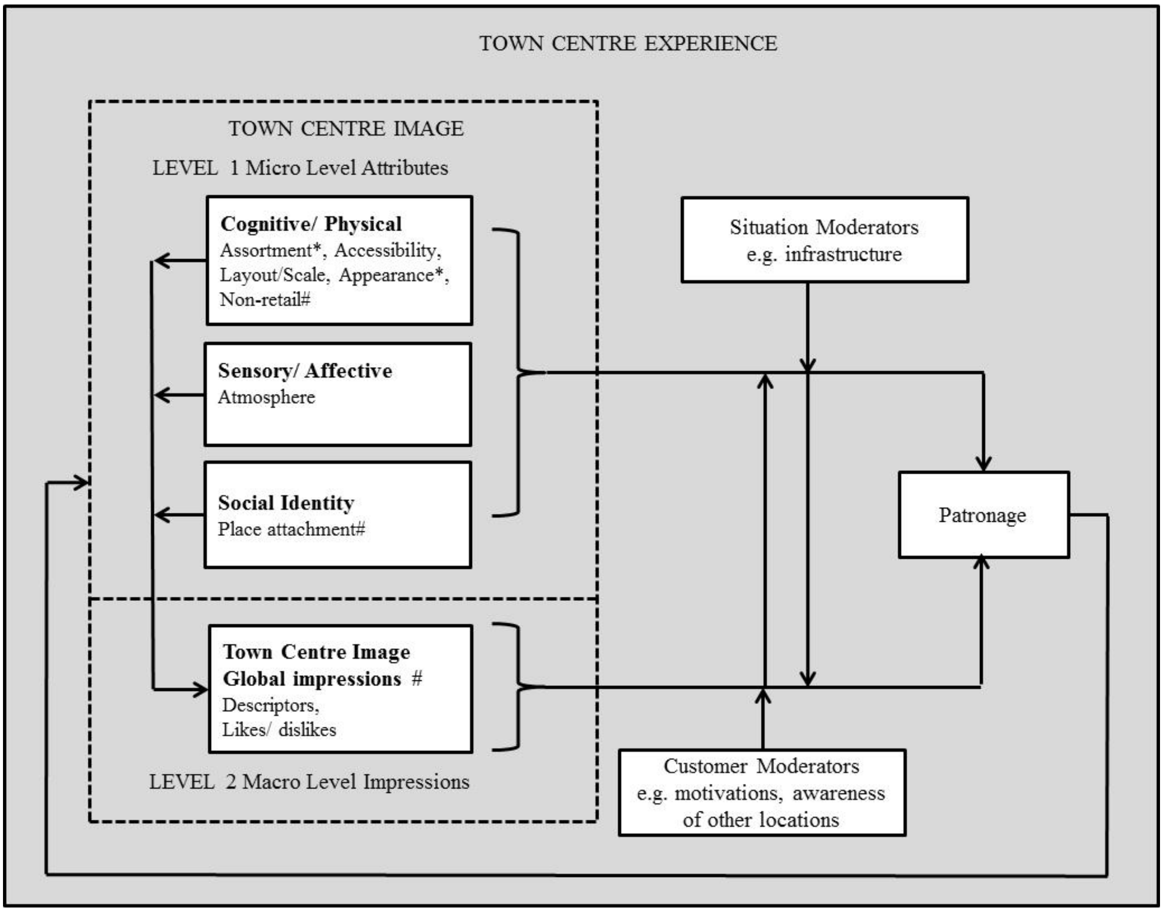
Five dimensions refer to functional elements, representing the features necessary for the town centre to operate as a retail centre. These include retail assortment, accessibility, layout / scale, appearance and non-retail activities. Two dimensions are associated with psychological, intangible elements (Martineau, 1958), namely atmosphere and place attachment. Furthermore, the town centre image structure suggests a 'multidimensional gestalt' composed of global impressions (Stern et al., 2001, p. 218; Zimmer & Golden, 1988).

When compared with the literature it is the exceptions and omissions within the dimension findings that deliver new insight into the consumers' image of a town centre. Only two functional dimensions (accessibility and layout / scale) evidence similar composition to that previously included in the literature, whereas three previously included dimensions (retail assortment, atmosphere, appearance) demonstrate a different composition within each dimension. Certain categories (service quality, advertising / promotions and shopping hours) appear less relevant to the town centre context and consumers' aggregation of town centre image. Importantly, the research findings reveal two new dimensions (non-retail activities, place attachment), a higher-level global impressions dimension and nine additional categories previously absent from town centre image studies (named shopping locations, named stores, descriptors, likes/dislikes, comparisons, boring/exciting, character/tradition, entertainment venues, familiarity).

A conceptual model of town centre image and experience

In the absence of a previously-developed and validated conceptual framework in the retail image literature, the Customer Experience Framework proposed by Verhoef et al. (2009) offers a preliminary framework for explaining the dimensions and constituents identified in Table 18, which combine into a contextualised model of town centre image in Figure 15. Figure 15 proposes that consumers' images of town centres are formed following similar dimensions to the framework suggested by the customer experience. Thus, as the consumer experiences the centre, the cognitive / physical, sensory / affective and social levels integrate in the creation of a town centre image. In addition, image becomes part of a process whereby consumers in some cases combine information regarding the town centre into an image gestalt or global impression (MacInnis & Price, 1987; Stern et al. 2001). The dimensions identified will influence consumers' town centre image formation in the following distinct ways (Finn & Louviere, 1996; Pan & Zinkhan, 2006).

Figure 15 Contextualised model of town centre image and experience



New dimensions

* Containing new characteristics

Cognitive / physical

This element contains five functional dimensions comprising assortment, accessibility, layout / scale, appearance and non-retail. The strength of the retail assortment, combined with easy access, internal layout, and perceived size / scale, suggest that consumers cognitively evaluate the town centre according to whether it functions as a retail centre, fulfilling the utility of a shopping trip. The strong emphasis on the store assortment suggests that consumers primarily evaluate the overall range and quality of shops before individual goods in a town centre.

Furthermore, by naming specific shopping locations (streets or in-town malls), consumers interpret town centres as not one entity of retail stores but different groups of stores that collectively form an overall image, supporting Houston and Nevin’s (1981) conclusion that a downtown area is a conglomerate of separate shopping streets. Moreover, naming specific retail brands in the town centre, suggests that other images, such as anchor stores, influence the overall town centre image (Chebat, Sirgy, & St-James, 2006; Finn & Louviere, 1996).

Consumers’ image of town centres is shaped by the physical appearance represented by the public space in terms of buildings and landmarks, community artworks and historical associations (Gentile et al., 2007; Runyan & Huddleston, 2006). While the assortment dimension represents increasingly homogenised stores and high streets (Dawson, 2002), character or tradition potentially distinguish one town centre from another. Consumers recognise and value visual attributes, particularly whether the centre is well maintained, clean, modern or deteriorated. This dimension holds particular relevance given the negative impact of store closures on the visual landscape. Notably, the non-retail activities, while outside of retailer control, nevertheless influence the consumer’s image and experience of that location. Compared to mall research, which includes leisure, services and entertainment venues, this dimension receives little recognition in town centre studies to date (Sit et al., 2003; Wakefield & Baker, 1998; Warnaby et al., 2002).

Sensory / affective

The experiential aspects of image suggest that consumers seek shopping experiences that provide sensory pleasure and satisfy emotional needs (Holbrook & Hirschman, 1982; Wakefield & Baker, 1998). The atmosphere or ambience perceived in the town centre generates emotional affective responses (Turley & Milliman, 2000), which ‘address sight, touch, taste, and smell so as to arouse aesthetical pleasure, excitement, satisfaction, sense of beauty’ (Gentile et al., 2007, p. 398). The new category labelled boring / exciting, demonstrates that town centres can also provide excitement, variety and stimulation (Park et al., 1986; Wakefield & Baker, 1998). The linked themes of ‘busy’ and ‘crowding’ indicate that some consumers have negative reactions to a vibrant atmosphere and avoid certain town centres. Out of town malls increasingly offer ‘an entire customer experience’ to attract and keep customers (Haytko & Baker, 2004, p. 68) whereas a town centre experience may be fragmented across a wider, physical location, which may be harder to manage and control. It is important therefore that centre managers understand the consumers' interpretation of atmosphere and its impact for a specific town centre in order to encourage patronage

Social

The consumer's relationship and familiarity with the centre should also contribute to the image formed in a town centre (Haytko & Baker, 2004). In this study, the social element reflects the sense of connectedness with, or attachment to, the town centre, particularly for those respondents who referred to the town centre as being in 'my home town' (Runyan & Huddleston, 2006). Store image studies refer to a 'sense of belonging' (Lindquist, 1974, p. 30), or 'deep attachment' (Martineau, 1958, p. 54), while in a mall context, place attachment is defined as a 'bond or link between people and specific places' (Allard, Babin, & Chebat, 2009, p. 42). The respondent perceptions of other shoppers and how they 'fit in' imply a sense of familiarity and trust, suggesting similar processes apply in a town centre. This is believed to occur through homophily, which is the notion that consumers associate with others whose images they perceive as similar to their own (Line et al., 2012; Sirgy et al., 1997). Homophily and feeling comfortable with certain other groups is linked to social identity (Tajfel, 1978), one of the sources of which is the neighbourhood or community (Forrest & Kearns, 2001). It also contributes to social capital through greater involvement with the community (Miller, 2001), which Forrest and Kearns (2001) argue leads to place attachment.

The more consumers interact with a town centre, and if their attachment becomes positive, the more likely they are to develop loyalty and recommend the location to others, enhancing its reputation (Brown et al., 2005; Orth, Limon, & Rose, 2010). Therefore, the social component is also likely to influence patronage behaviour through perceptions of other shoppers and place attachment. Yet retail researchers have only recently considered the notion of place attachment, and currently its role in relation to town centre image is poorly understood (Mullis & Kim, 2011; Sneed et al., 2011). This is surprising since place attachment may be considered more important in town centres, as place and identity are believed inter-related (Cresswell, 1996).

Global impressions

The global impressions dimension supports the notion that 'non-fitting' responses are potentially most interesting to the holistic image concept (Keaveney & Hunt, 1992, p.167). Within this dimension, global positive / negative responses summarise consumers' subjective reactions to that location, these descriptors appearing to simplify informational stimuli from the retail environment (Mitchell, 2001). The global impressions dimension identified in this research concurs with Zimmer and Golden (1988)'s suggestion that global image impressions are formed from 'a consumer abstraction process wherein many attributes are considered initially and then a higher-level, affectively based category is formed' (p. 273). When processing informational stimuli, consumers unconsciously form judgments, developing affective responses in terms of likes and dislikes or subjective descriptions (Stern et al. 2001; Darden & Babin 1994; Cohen, 1982). Alternatively, consumers may form images simply as an overall impression on the basis of 'a couple of ideas' which most closely represent the location for them (Zimmer & Golden, 1988, p. 287), consistent with automatic cognitive processing theory where spontaneous image responses form with little conscious thought, and thus contain only a few items of information (Fazio, 1989; Grunert, 1996; Louviere & Gaeth, 1987).

Categorisation and image of other locations

Originally included in the global impressions dimension was the use by consumers of 'labels, prototypes and exemplars', to compare a town centre with other known good examples of the category (Zimmer & Golden, 1988). Category-based information processing integrates new information with existing information through schemas held in the memory and is believed to assist consumers through reducing effort in image formation (Keaveney & Hunt, 1992). Rather than viewing each location through a system of separate attributes, consumers will initially avoid effort through comparing it with other known locations (Keaveney & Hunt, 1992). Following subsequent discussion, this category appeared to differ from the other two categories in the global impressions dimension. Positive or negative evaluations and descriptors perform an evaluative role, whereas the comparison category demonstrates varying levels of awareness of other locations with which to compare the location in question. Respondents could have varying levels of awareness of other locations for example due to their backgrounds, mobility and past experiences, and hence this category was deemed to have a moderating effect on the resulting image construct rather than acting as a component of the image construct.

Consumer and situation influences

Considering the 'multiple factors both within and outside the retailer's control' that influence the image of the town centre, our model includes consumer and situation influences (Verhoef et al., 2009, p. 33). The relationship between the individual dimensions of town centre image and patronage is likely to be influenced by the consumer's purpose of visit, whether shopping or wider purposes. Shopping motivations may include utilitarian or hedonic / experiential typologies (Holbrook & Hirschman, 1982) where for example, 'grazer' shoppers (Bloch, Ridgway, & Dawson, 1994) may consider the availability of cafes and restaurants as important as retail assortment. Personal and socio demographic characteristics and expectations also shape the image perceived (Haytko & Baker, 2004; Miller & Kean, 1997; Otnes & McGrath, 2001).

Given the nature of the town centre environment, situation factors such as the type of town centre, proximity to competitive centres, the local infrastructure and support available such as Business Improvement Districts, will affect maintenance and the perceived visual appearance. Macro issues such as economic climate and government policy will influence the viability and perceived vitality of the town centre (Ravenscroft 2000).

The consumer's previous and future town centre experiences will accordingly reinforce or amend the likelihood that this image will influence patronage over time (Berry, 1969). Further to Verhoef et al. (2009) we confirm town centre image as involving the customer's cognitive / physical, sensory / affective and social image responses to the totality of the town centre experience. In this respect, town centre experiences encompass every interaction with a town or city centre offering from the marketing, access to, movement within the centre through to the outcome of that visit.

Conclusions and implications

This study aimed to fill a literature gap by conceptualising town centre image. Our findings suggest that consumers form images of town centres, which are distinct from other retail locations such as stores and malls. Previous image conceptualisations attract criticism for excluding the consumer and failing to capture the image gestalt (Zimmer & Golden, 1988). By focusing on a customer experience framework, we uncover a process of consumer image generation (Stern et al., 2001), and identify a set of 'dimensions' that influence town centre image formation, including new categories and dimensions not hitherto considered by the town centre image literature.

Various studies hypothesise the holistic image construct (e.g. Mazursky & Jacoby, 1986; Bell, 1999). With the exception of Zimmer and Golden (1988) in the store image context, no research attempts to explain the content of the holistic component of image (Stern et al., 2001). Indeed, few researchers attempt to measure consumers' holistic or global impression of image due to the complexity involved in capturing and analysing 'an overall picture that is more than the sum of the parts' (Marks, 1976, p. 37). By categorising all consumer responses, including those usually discarded due to their 'non-fitting' nature (Chowdhury, Reardon and Srivastava, 1998; Keaveney & Hunt, 1992) we demonstrate a first attempt to conceptualise holistic image in a town centre context.

Similar to Zimmer and Golden (1988), we find that functional attribute specific descriptors only represent part of the consumer's image. It appears that consumers may form images of retail locations employing either or both attribute or holistic approaches and involving more psychological, intangible elements than previously included. Moreover, town centre image comprises beliefs and attitudes evidenced in respondents' use of summary judgments or global impressions of complex retail environments.

The inability of researchers to agree a consistent set of salient dimensions driving town centre image may be due to incomplete image measures adapted from other retail environments. It is clear that further empirical work is warranted in terms of operationalising image, and to recalibrate the internal composition of dimensions for the town centre context. Given the strength of the global impression dimension, one priority is to investigate methods to capture this image component.

Managing image and the customer experience in the town centre

In isolation, retail image has limited value, but gains strategic meaning when related to patronage or loyalty (P. E. Downs & Haynes, 1984). We provide a practical application of the image variable through its links with the customer experience. Increasingly, consumers will expect businesses to use coordinated strategies to support and add value to the customer experience. As Houston and Nevin (1981) suggest ‘the image variable offers the most practical focus for downtown revitalisation efforts’ (p. 677). In town centre terms, this will translate into a coordinated approach to managing its image beyond simply marketing the place as a brand.

To retain and increase consumer patronage, marketers will need to understand the ‘touch points’ of key contacts with the town centre (Frow & Payne, 2007). If customer experience is the sum of all experiences a customer has with a provider of goods and services, then town centre management will actively need to manage that experience, together with their retail partners and other stakeholders such as local government and retail property developers. Identifying the unique combinations of positive or negative image drivers by which consumers distinguish individual town centres can then support proactive customer experience strategies. For example, the complexity of town centre image suggests that consumers use other images as ‘anchors’ to both simplify and describe the town centre. Favourite brands, departments, stores and in town shopping streets or malls influence the consumer’s image of the town centre. These multiple retail images require careful management to ensure congruity with each other and the town centre image (Ailawadi & Keller, 2004). If a retail store image improves by linking with a high brand image, and the retail image suffers if linked with a low image brand (Jacoby & Mazursky, 1984), then introducing incongruent retail brands may have a negative effect on the overall town centre image. To manage the town centre experience effectively, town centre management will need to identify which combination of brands achieve most synergy for that location. The character and tradition of a town centre may be valued more highly than concerns for central parking. Researching consumers' 'touch points' for that town centre could generate new opportunities for shoppers to celebrate the local heritage of specific streets or buildings, for instance, by creating a 'heritage' access route from outlying car parks with supporting signage, seating, and historical information points. This could be reinforced with associated events organised through local retailers and community groups. Monitoring the customer experience and image will accordingly help create and communicate the town centre as a 'place brand', enhancing the competitiveness, long-term patronage and viability of the centre.

Future research needs to consider a number of issues. First, as noted above, the model and dimensions we have identified require testing. Second, current town centre image research assumes attribute based processing, ignoring prior town centre experience and potential category based processing (Keaveney & Hunt, 1992). Our findings suggest that consumers make inferences about a town centre by comparing it with their experience of similar town centres; it would be useful to understand the circumstances under which this occurs. Third, the type of shopping trip or shopping orientations (Darden & Reynolds, 1971) may impact the perceived image, raising the question of the extent to which enjoyment, or recreational shopping, influence the town centre experience. It is suggested that image is determined by the shopping motivation of the consumer over time. Thus a longitudinal study may deliver greater insights (Osman, 1993). Fourth, we have not considered additional variables such as size and type of centre. How might the dimension salience vary for smaller shopping areas such as market towns, compared with larger city centres? Finally, it would be desirable to explore how consumers categorise town centres to form a generic town centre schema. Longer term, this knowledge may also inform the predominantly stakeholder view of town centre attractiveness rankings.

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