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PART ONE

Internationalization Process

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1 The Internationalization Process

OBJECTIVES

This chapter considers the development of international retailing as a subject area and delineates the important issues that have defined, and are defining, this area of study. Research material referred to in the text provides students with an opportunity for further reading and to develop their studies to the advanced level of their choice. It also provides an initial discussion of various issues that are considered later in the book.

Introduction

International retail operations are fundamentally changing the methods by which consumer goods are distributed and marketed globally. International retailers have established themselves as global players that have considerable influence on the markets they enter. Their influence is felt both within the marketplace and within the supply chain, where they are able to exercise their considerable buying power and influence the development of suppliers within the markets they establish operations.

However, traditionally retail operations have been perceived as localized or national operations, with limited market power and limited managerial skills and sophistication. In the past, this has been a valid perception as far as most retailers and most markets were concerned. Small retail operations with limited horizons have been the outlets for goods produced by large manufacturing organizations with national or international markets. Consequently, these large suppliers have dominated national marketing and international marketing efforts within the distribution channel, so that retailers, for the most part, have merely acted as the conduits through which goods reached the market.

This situation is no longer typical of retail distribution channels in developed consumer markets. The emerging channel power of large retail operations has been altering this situation for some time. On the national level, and in those economies around the world that have been able to support the growth of large retail operations, individual retail organizations have exerted considerable power within the distribution channel for decades. Such organizations, through the market concentration they have created by virtue of their operational growth, have shifted the balance of channel power from the supplier to the retailer.

The increased size of retail operations has stimulated and supported international expansion. Revenue earned within the domestic market has been invested in operations in new markets in an attempt to sustain financial growth targets. Large organizations, faced with limited opportunities domestically, have sought expansion in non-domestic markets. An important part of the logic of international retail development has been the pressures exerted by restrictions within the domestic market. However, growth has also been achieved through the development of sophisticated operations within the context of a developed economy and retail structure.

The growth of large retail organizations has encouraged functional development within the organizational structure. Large retailers have been able to develop specialized managerial functions. For example, the formalized marketing function developed relatively late within the retail sector. In turn, this has allowed retailers to consider expansion outside the national market. However, this general development of the retail structure and the market oriented role that retailers have adopted has also facilitated the growth of international retail operations, which are not so much forced out into the international arena but pulled into other markets through the international relevance of the product and service that they offer.

International retailing for many retailers is no longer a regrettable logic precipitated by limited growth potential domestically, but an opportunity to expand their operating base into the global marketplace, where their services and brands will be valued by a wider customer base.

Defining International Retailing Activity

How should we define internationalization in a retailing context? While the literature available on this subject uses the term freely, and a particular activity is assumed to be understood by it, the term deserves detailed consideration if the process of internationalization is to be properly understood.

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The Organization

While the global market has seen the internationalization of retail concepts for a considerable period of time, international retailing is not the transfer of concepts to new environments; it is the establishment of operations and/or consumer relationships in new markets. International retailing is firmly focused on the organization and the organization's involvement with international markets.

Concept Transfer

Internationalization of a retail concept may occur without an international organization directly transferring a concept through a physical presence in a market. The internationalization of a concept—a format or operating practice—is a commonplace activity and involves retailers adopting new practices in their local markets.

The adoption of retail concepts such as operating formats is often initiated in a market following the arrival of an international retail company, as retailers in the market see the value and threat of innovative operating procedures. Retail concepts are relatively easily replicated; therefore, as retailing has become internationalized, the transfer of retail concepts is a well-established aspect of retailing. The supermarket is a classic example of a concept that has been transferred by retailers in one market replicating the format they have observed in another market.

Retail Activity

In contrast to the transfer of concepts through the international flow of know-how, international retailing is the meeting of consumers' needs in international markets by retail organizations. Retailers may operate in international markets through a wide variety of formats and in different contexts. They may operate big box hypermarket or warehouse style operations, such as Tesco, Carrefour, and B&Q. They may operate small concessionary outlets in department stores, such as the fashion retailer Oasis and the cosmetics, bath and body products brand Molton Brown. They may franchise their operation, as Marks & Spencer does in international markets. They may enter the market without local partners or use local partners to facilitate development of the operation. They may serve customers through internet operations.

Market Based Operations

Within the organization the first important distinction with regard to international activity is the difference between:

- 'resource-seeking' international activity such as 'foreign sourcing and importing', and
- 'market-serving' internationalization, which involves 'servicing customers in non-domestic markets' (Vida, Reardon, and Fairhurst, 2000: 41).

International retailing is not concerned with the first activity noted above: that is, those activities that occur in the domestic market involving the importation of products from other markets. International retailing is, however, about the second activity. That is, it is about meeting customer needs in international markets.

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One Company, Two or More Markets

Therefore, fundamentally, international retailing concerns retail operations, owned by a single company, in more than one country. 'International retail operations may be defined as the operation, by a single firm or alliance, of shops, or other forms of retail distribution, in more than one country' (Dawson, 1994: 268).

However, as Alexander and Myers (2000) have noted, international retailing has both a firm and a market dimension to it. Therefore, while Dawson's definition (1994) above provides a standard definition of the activity, it only goes so far in describing the multifaceted nature of international retailing and the global retail environment. Consequently, it is necessary to identify what the international retail organization does and the boundaries that it has to cross when operating in the international environment.

The Market

Country boundaries are state boundaries and are fundamentally regulatory and political in nature. However, state boundaries do not describe the cultural differences that exist between countries, or, conversely, they do not indicate that there are many countries that share important cultural characteristics that make international expansion across state boundaries relatively easy.

International Boundaries

To achieve a better understanding of what international retail activity encompasses and the barriers that international operations face, it is convenient to think of internationalization in terms of retailers crossing political, economic, social, cultural, and retail structural boundaries.

Political Boundaries

These boundaries are determined by geopolitics and geopolitical divisions and are represented by both the regulatory contexts that face retailers in the international environment, and also the political environment that leads to the formulation of the regulatory environment.

Politics

Political uncertainty is an important issue for any retailer considering international activity. Retailers are particularly susceptible to changes in the political climate, as they may have considerable property investments in non-domestic markets that are not easily realized in times of political crises. Political boundaries are not as fixed as they may sometimes appear. Western Europe between 1945 and 1990 saw not only considerable economic growth but also a somewhat uncharacteristic stability in national boundaries. The 1990s, particularly in Central and Eastern Europe, witnessed rapid changes in boundaries, the stability of which had so recently seemed assured.

Regulations

Usually, state boundaries are used to describe the extent of international activity. On this basis, a German retailer operating in the US may be said to operate in one international

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BOX 1.1 JULIUS MEINL

The importance of changing political boundaries is exemplified by the experience and long history of Julius Meinl, an Austrian food retailer originally founded in Vienna in 1862. Today Julius Meinl has returned to its roots as a supplier of tea, coffee, jams, and other luxury foods and away from its general food retail business.

When Julius Meinl considered the problems of retail operations in Prague and Budapest in the first decade of the twentieth century, the retailer was not considering moving outside the country of which Vienna was the capital. Until the peace treaties that followed the First World War, the Austro-Hungarian Empire encompassed the area that was to become Austria, Czechoslovakia, and Hungary as well as much of Yugoslavia and Romania.

By 1939 the company had over 1,000 company or franchised stores in Central and Eastern Europe. It had a substantial international presence in Central and South-Eastern Europe. By 1945 it had nothing. The command economies of the region ensured that the company was unable to return to many of its former markets between the late 1940s and early 1990s.

Following the fundamental changes in government in Central and Eastern Europe in the early 1990s, Julius Meinl again started operating in other markets in the region. However, following various trading problems, after 2000 the company divested its operations in such markets as the Czech Republic to rivals such as Ahold and the company has now come full circle and returned to its Viennese roots.

Sources: Alexander (1997); *Czech Republic Business Bulletin* (2005); PrimeZone Media Network (2005); Meinl (2007).

market and will be considered to have less of an international profile than a Japanese retailer operating in Germany and the UK. This, however, is far too simplistic a method of describing the differences that these retailers will face in terms of the political, and hence regulatory, environment.

- A German retailer, in this example, may have operations in California, New York, and Texas, and, while subject to the federal regulations of the US government, will also be subject to the regulations of the individual states of California, New York, and Texas. Local taxes will need to be considered, and the effect they will have on retailers' pricing structure. Also, a retailer will have to be aware of the agreements that the US government has signed with Canada and Mexico in establishing a Free Trade Area. A retailer may find that this agreement will allow products to be sourced more easily from these markets, although they are outside the 'country' in which the retailer has established an operation.
- A Japanese retailer operating in Europe will have to conform to British and German government regulations if it has an operation in those markets. However, it will also have to conform to local regulations such as those of the German *Länder* (provinces). Likewise, the Japanese retailer will also have to be aware of the supra-national regulations of the European Union.

The regulatory environment, therefore, while appearing to provide the clearest division as far as international retail activity is concerned, is in itself a complex structure of interrelated

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BOX 1.2 W. H. SMITH

It seems almost unbelievable that a UK retailer operating in Canada would find itself in the position W. H. Smith did in the 1980s. Both countries are part of the British Commonwealth and have very strong cultural and political connections. However, W. H. Smith, the UK stationery and book retailer, with a history of nearly four decades in the Canadian market behind it was finally prompted to withdraw from the market when the Canadian government's regulations on non-domestic ownership in the book sector required W. H. Smith to part with 49 per cent of its subsidiary to Canadian investors.

Source: Brass (1992).

regulatory environments that define the international challenge faced by the individual retail operation. Retailers will find that, while some markets may at times appear conducive to expansion, regulations or changes in regulations will make it difficult for them to operate. This may occur in markets that appear psychologically proximate.

Economic Boundaries

International retailers often reduce risk by avoiding operating in significantly different economic conditions. Retailers based in developed economies may favour moving into markets that have reached similar levels of economic development, where they will be able to operate the type of retail outlets they have developed in their domestic market and, in consequence, serve a similar set of customers. Luxury goods retailers, such as Louis Vuitton and Prada, will often be dispersed around the globe in cosmopolitan centres such as London, New York, Paris, and Tokyo, but not develop national chains within the countries in which they operate. Conversely, some retailers, such as big box food retailers like Carrefour and Tesco, might favour operating in less developed economies, where they will have the advantage of building up market share as the market develops.

In economic, as well as political, terms, retailers must also be aware of the fundamental differences that exist within national markets in the global environment. These differences help to explain different growth patterns of international operations. A European food retailer considering expansion in the US will have various economic issues to address. While the US has the highest GDP in the world, the purchasing power of consumers varies considerably between the states of the Union. In 2005 the US Census Bureau figures showed that the average household income in the US was US$42,242. Certain states, such as New Jersey (US$61,672), Maryland (US$61,592), and Connecticut (US$60,941), had much higher average household income, and therefore spending power, than other states such as West Virginia (US$33,452) and Arkansas (US$34,999) (US Census Bureau, 2007). Therefore, a retailer considering entering the US needs to be very aware of the economic differences between states, and therefore the potential consumer purchasing power they would be exposed to and could benefit from in different parts of the same country.

When assessing the international expansion of international retailers, it is important to understand the economic conditions within a company's domestic market. This will have a fundamental effect on the nature of the process. Different answers to the following questions will describe very different international retail operations:

- Has the retailer accessed only wealthy cosmopolitan centres?
- Has the retailer entered a national market with similar levels of the GDP per capita to be found in the retailer's domestic market?
- Has the retailer targeted the most economically developed markets or less-developed markets?

Social Boundaries

Social conditions will be linked to economic development but not inextricably so. Social conditions will also be affected by culture. The different contexts in which customers live, work, and consume the products they purchase will play an important part in the international retailer's role within different societies.

Social factors are defined here as demographic characteristics and the consumer artefacts of everyday life. The size of households and the ownership of specific goods are important indicators for retailers of a society's readiness for retail structural change and the introduction of retail operations into a market. Today the use of information technology will have a major impact on the way in which retailers communicate with their customers and ultimately sell products. In northern Europe, consumers show a greater willingness to order goods over the internet than their counterparts in southern Europe. Such differences are indicative of different lifestyles, buying behaviour, and retail usage.

In Europe, variations in social conditions may be expected; however, in other societies, such as the US, a considerable degree of heterogeneity also exists. A retailer operating in the United States will find considerable differences in the social conditions across the country. The US, it has been suggested, is not just composed of fifty states; rather North America as a whole constitutes a number of broader social environments (Garreau, 1981), which do not recognize what are often arbitrary state boundaries. Garreau would suggest that there are nine such environments, but many more might be inferred on the basis of the consideration of local conditions.

BOX 1.3 PERCEPTUAL DISTANCE

UK retailers have expanded into the Republic of Ireland, the US, and in markets of the 'old' Commonwealth (Australia, Canada, and New Zealand), because these markets have been seen as culturally similar and therefore less challenging. However, such assumptions have often been misplaced, as retailers may find that they have to deal with different regulations, social conditions, or competitive retail structures that render cultural affinity insignificant. Retailers such as Marks & Spencer and Boots, institutions in their domestic market of the UK, have found operating conditions in these culturally similar markets to be unimportant in sustaining operations when it came to investments and subsequent divestments from such markets.

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Cultural Boundaries

Retailers, when internationalizing their operation, will often seek to expand into markets where they believe their operations will have an immediate relevance and within which they will feel comfortable. Therefore, for example, German retailers may find themselves considering expansion in Austria before other markets because of the lack of language barriers and the existence of cultural empathy.

It is also important to note that cultural differences are not neatly defined by state boundaries. Such differences may be greater within states than between states. As Hollander (1970: 112) observed, although 'ardent nationalists may want to disagree . . . the market and economic differences between say, Germany and Austria or between the United States and Canada are certainly no greater than the differences within any of those countries'.

Retailers may, therefore, seek in the first instance to move into markets that are not culturally distant. In time, the same retailer may look to less culturally similar but economically more attractive markets. Therefore, international retail activity may be considered at different levels of cultural penetration. However, it should be remembered that, just because a retailer operates in markets that may ostensibly appear to be culturally distinct, it does not necessarily follow that the retailer has addressed cultural differences. The retailer may be serving customers who have accepted the cultural agenda of the retailer or may be serving the needs of expatriates of the retailer's domestic market in new markets.

BOX 1.4 UNITED ARAB EMIRATES

Waitrose's announcement at the very end of 2007 that it had signed a franchising agreement to open more than twenty stores in the United Arab Emirates (UAE) is notable for two reasons: first, this is the UK food retailer's first international venture; secondly, the choice of the UAE location is largely as a result of the significant expatriate market in Dubai and the attraction of Western brands to the affluent Arab population. The franchise agreement is with Spinneys, a Dubai-based retail operation with which Waitrose already operates an export agreement to sell Waitrose products. The franchise agreement moves this relationship forward, setting up Waitrose branded stores for the first time outside the UK.

Interestingly, sales of UK food products in the UAE in 2005 were reported to be £350 million, highlighting the potential of the market for UK food retailing. On one level, while the UAE would seem to be a curious choice as a first international venture for a UK food retailer, Waitrose's strategy is to target identified segments of the market that are positively disposed to its products, having already carried out market research via earlier exporting activity with Spinneys.

Source: Rigby (2007).

Retail Structural Boundaries

A retail structure defines the competitive environment in which the international retailer will have to operate on entering a new market. The retail structure will be determined by the factors discussed above, but it is also a product of the historical experience of retailers in specific markets.

The retail structure will contain different operating formats. These may be stand-alone units in shopping malls or on high streets. They may be department stores or hypermarkets. In some markets, cooperative societies may be an important part of the retail and distribution system, while in other markets voluntary groups—associations of independent small and medium-sized enterprises (SMEs)—may affect the competitive environment.

In some markets a relatively limited number of retailers may control considerable market shares, making it very difficult for an international retailer to break into the market. In other markets, competition may be fragmented, with a large number of small and medium-sized stores unable to offer incoming international operations a significant challenge.

The competitive structure in international markets is increasingly influenced by international retailers. Therefore, compared with markets in the early 1990s, international retailers may find their way into a market blocked by other international retailers rather than by retailers indigenous to the market into which they are attempting to move. This may mean that retailers will seek to acquire the international operations of retailers that have moved into a market but, following operational experience in the market, want to divest their operations.

BOX 1.5 STORE SWAP

Carrefour and Tesco's store swap at the end of 2005 highlights the complexity in retail structures and was, in itself, a very imaginative solution to real strategic considerations for both retailers. Both Tesco and Carrefour have evolved as international retailers to the point whereby they both aim to be in the top two to three retailers in an international market. Tesco operated five stores in Taiwan; Carrefour had fifteen hypermarkets in Slovakia and the Czech Republic. The companies agreed an asset swap of each other's stores. Tesco had been struggling to compete with Carrefour in Taiwan, and it did not look as though it could reach its aim of being in the top echelons of retailing in that market. Carrefour was operating at number six in Slovakia and seventh in the Czech Republic. The decision of both firms to leave those markets was a direct response by both management teams to their declarations they will persevere only with a market where they can be market leaders.

Sources: Rigby (2005); Loades-Carter (2006).

International Retailing and Internationalization

When considering international expansion, retailers should be aware of the different boundaries that they propose crossing and the degree of unfamiliarity they will encounter. As the preceding discussion shows, a detailed definition of international retailing is required.

International retailing is:

- the management of retail operations in markets that are different from each other in their regulation, economic development, social conditions, cultural environment, and retail structures.

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The internationalization of retailing may therefore be defined as:

- the transfer of retail management technology or the establishment of international trading relationships that bring to a retail organization a level of international integration that establishes the retailer within the international environment in such a way as to transcend regulatory, economic, social, cultural, and retail structural boundaries.

However, as the previous discussion suggests, in order to reduce risk, retailers will often confine their operations to a relatively limited and comparatively safe collection of markets. Retail techniques, however, may well spread beyond the markets in which the key proponents of operational approaches expand. Internationalization must therefore be seen to include the spread of know-how independently of retailers.

Research Developments

Changes in the international retail environment have had, and continue to have, an impact on academic perceptions and understanding of the retail internationalization process and international retailing. International retailing is a relatively new subject. This makes it a vibrant subject area where new research, conceptualizations, and, of course, commercial events are continually testing and challenging understanding in this area.

An Emerging Area for Research

After the 1980s, the literature on international retailing grew considerably. Conference papers and journal articles began to describe and define the nature of international activity in the light of new initiatives by retailers based in markets with developed retail structures. The literature published before the mid-1980s was comparatively limited, although the literature of this earlier period should not be dismissed as unimportant.

Indeed, the early literature has had a major influence on more recent research activity, defining the research directions and structuring intellectual perceptions. Texts such as those by Hollander (1970), Waldman (1978), and Kacker (1985) have helped to define international retailing as a subject area. These texts are evidence of how thinking has evolved in the area of international retailing, but they also show how earlier interpretations retain a validity and how important they were in identifying fundamental issues. Hollander's work (1970), in particular, continues to impress new generations of students. Its lucid style and rigorous approach ensure that it remains an important milestone in the development of international retail studies, and it is a reminder of the breadth of issues that are involved in the internationalization process.[1]

Hollander, Waldman, and Kacker wrote and carried out their research within the US university environment and from the perspective of the US commercial context, as indeed did many of the early writers on this subject.[2] Therefore, the early literature is heavily influenced by US ideas, perspectives, and concerns. There were two main reasons for this.

First, US retailers were amongst the earliest retailers to establish large international retail operations. Woolworths and Sears Roebuck are two early examples of US retailers

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that have had an important impact on markets outside the US (Wood and Keyser, 1953; Woolworth, 1954; Fritsch, 1962; Truitt, 1984). Woolworths undertook operations in the Canadian market in 1897, in the UK by the end of 1909, and in Germany by the end of 1926 (Woolworth, 1954). In the 1940s, Sears Roebuck began operating in less-developed markets contiguous to the US: Cuba in 1942 and Mexico in 1947 (Sun, 1992). In these markets, Sears Roebuck was to play an important role in the development of distribution channels.

Secondly, heavy investment in US retailing by European companies in the late 1970s attracted interest and comment. It has been estimated that 10 per cent of the US grocery market was owned by European companies by the end of the 1970s (Ball, 1980). The 1970s witnessed a significant shift in the direction of investment activity. There were only 'six foreign owned retailers in 1975' in the US food sector; by 1980 there were twenty-three grocery operations, of which over half had been 'acquired since 1978' (Seigle and Handy, 1981: 14).

Renaissance of Interest

However, by the 1980s, this interest in US retailing had to be placed in a wider international context. As international retail activity increased elsewhere in the world, not least within Europe, and the previously inaccessible markets in Eastern Europe and Asia became viable investment targets, the opportunities for expansion entered a new phase, and research reflected this. From the early 1960s, the pre-eminence of US retailing was eroded as European retailers not only developed large and efficient operations in their domestic markets, but were increasingly capable of investing in, and bringing managerial expertise to, US markets. European retailing has had a particularly important part to play in the new wave of international activity that began to develop in the late 1970s but that started to have a considerable impact on host markets by the mid-1980s.

As international activity increased, research appeared that identified international activity (Mitton, 1987; Treadgold, 1988), provided examples of retailer cross-border influence on retail structures in other markets (Goldman, 1974*a*, *b*, 1981; Kaynak, 1980, 1985; Exstein and Weitzman, 1991), and explored the international experience of individual companies (Lord *et al.*, 1988; Bunce, 1989; Laulajainen, 1991, 1992; Martenson, 1981; Treadgold, 1991).

Emerging Themes

It was not until the early 1990s that research moved away from the identification of activity and observation of international retailer initiatives towards research focused on specific issues of internationalization and different research methodologies. Research turned to such issues as the identification of the motives that lay behind internationalization (Alexander, 1990*a*, *b*; Williams, 1992*a*, *b*) and issues of organizational culture (McGoldrick and Fryer, 1993) associated with internationalization. Within this context, a number of themes began to emerge in the literature.

The Direction of Growth

A key theme that grew out of the earlier work on identifying the markets into which retailers had moved was the direction of international retail activity. Research began to

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recognize the importance of geographical proximity, psychological or cultural proximity, and the attractions of large prosperous markets as well as the opportunities in underdeveloped markets. Work on European retailing (Burt, 1993) and Japanese companies told a similar story (Davies, 1993). Robinson and Clarke-Hill's work (1990) on major German, Belgian, Dutch, Danish, French, and UK retailers, using Knee and Walters's paradigm (1985), explored the 'directional growth' of European retailers and found that a significant number of those studied expanded into other European Community countries. Retailers, the research found, are often attracted to expand into geographically proximate markets, where the markets of destination, while showing signs of economic development, possess a retail structure that is not as developed as the retail structure in the internationalizing retailer's domestic market. This echoes Hollander's observation (1970) that internationalization could be used as a means of pre-empting moves by other retailers into a new market through the gaining of market share.

International Strategies

Interest in the direction and nature of international retail activity has prompted some academics to suggest taxonomies that grouped international retail operations activities on identifiable criteria. Treadgold (1988) identified four operational strategies employed by international retail operations: 'cautious internationalists', 'emboldened internationalists', 'aggressive internationalists', and 'world powers'. Treadgold's categories were defined by entry and operating strategies; they were also defined by the geographical expansion that individual retailers have achieved. Thus, to some extent, these categories refer to stages in the development of international retail operations. In a later publication, following further research and observation, Treadgold (1991) developed his theme by suggesting a typology of international activity based on geographic presence and time. He suggested that it is possible to understand the development of an international operation in terms of reluctant, cautious, and ambitious stages.

In contrast, but exploring a similar issue, Salmon and Tordjman (1989) suggested three categories of international action: investment, multinational, and global. The first is self-explanatory and involves the transfer of funds for the partial or full acquisition of a retail operation in another market. The other two categories describe the degree of similarity international operations have to the parent company's operation in the home market. Multinational operations use different retail formats and different marketing approaches in different markets while global operations 'replicate the same formula worldwide' (Salmon and Tordjman, 1989: 12).

Retail Companies

The study of individual company experiences was already well established (Woolworth, 1954; Kaynak, 1980; Martenson, 1981, 1987, 1988; Truitt, 1984; Arbose, 1985; Lord *et al.*, 1988; Hildebrand, 1989) and continued as a theme within the literature (Clarke-Hill and Robinson, 1992; Fernie, 1992; Whitehead, 1992; Sparks, 1996). The early examples of the literature, such as Woolworths and Sears Roebuck, remain interesting and valid examples today (Woolworth, 1954; Truitt, 1984) and, along with later studies of companies such as Ikea (Martenson, 1981, 1988; Arbose, 1985) and Carrefour (Burt, 1986) usefully illustrate other themes, such as the motives behind internationalization and the process

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of international development. Likewise, these case studies provide useful insights into Treadgold's analysis (1988) of the level of international development reached by a retail organization.

National Markets

Research in this period (Lane and Hildebrand, 1990; Fulop, 1991; Burns and Rayman, 1996) also built on earlier work (Dunn, 1962; Jefferys, 1968; Arndt, 1972; Goldman, 1974*a*, *b*; Dawson, 1976; Dickson, 1979; Goldman, 1981; Kaynak and Cavusgil, 1982; Burt, 1984; Truitt, 1984; Kaynak, 1985; Ho and Sin, 1987; Tordjman, 1988; Hildebrand, 1989) on the conditions in different markets or the effect of change or innovation in specific markets. This research provided both detailed studies of the markets concerned and insights into the effects of specific developments emphasized in other research. Building on the earlier work of Goldman (1974*a*, *b*), further work (Goldman, 1981; Conners, Samli, and Kaynak, 1985; Kaynak, 1985; Alawi 1986) explored the issue of knowledge transfer between markets through the development of the supermarket and self-service operations.

Some themes were not explored further. Arndt's consideration (1972) of temporal lags in retailing is an example of the type of research that remains relatively unexplored. Arndt took an environmental approach in respect of the fundamental dynamic that lies behind retail innovation (Brown, 1987). The predictive power of such analysis did not develop sufficiently to allow confidence to be placed in such analysis: 'the sheer variety of social, political, cultural, legal and historical forces at work within individual countries indicates that institutional diversity rather than uniformity is the hallmark of retail innovation' (Brown, 1987: 7).

Nevertheless, Arndt has provided an inheritance that continued into the later literature. The fundamental assumption is frequently made in the literature that markets will experience common patterns of retail structural development. This has been particularly true in the European context, where the 'under-developed markets' of 'Spain and Italy but also Portugal and Greece' were seen as providing 'growth opportunities' for European companies constrained in north European markets (Treadgold, 1991: 11). These statements are not unqualified. The differences in consumer tastes and trading conditions were recognized, but where, as in the EU, 'convergence of national markets, or at least the blurring of boundaries between them' (Treadgold, 1991: 26) is perceived, the logic of temporal lags in development remains a fundamental premise.

Saturation

The earlier literature recognized that limited market opportunities may force retailers into the international arena and regulation in the domestic market may represent an important element of such restrictions (Dawson, 1976, 1982; Fries, 1978; Burt, 1984, 1986; Leunis and François, 1988). This theme was also carried forward and explored in further depth (François and Leunis, 1991; Davies and Whitehead, 1993). Research considered the effect of the legislative environment on retail structures and found a relationship between economic and retail development and a situation 'where countries with the highest divergence from the correlation tend to have either relatively liberal or relatively restricted planning environments' (Davies and Whitehead, 1993: 1). Davies and Whitehead's research findings (1993) supported Leunis and François (1988), who suggested that the

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Belgian Loi Cadenas or Padlock Law 'has had a major impact upon the evolution of the number of supermarkets and of the number of hypermarkets' (Leunis and François, 1988: 151), although their statement contrasted with Burt's contention (1984: 19) 'that the Loi Royer may not have had the restrictive effect on growth that was expected'.

Market saturation has played a fundamental part in the development of the discussion on the motivations that lie behind internationalization. Literature on this issue deserves particular consideration. Retail saturation may be understood, however, on a number of levels. For example, it may be considered to be saturation of the format, such as the superstore, or the fascia, such as Tesco.

The UK grocery sector has received considerable attention in respect of this issue (Killen and Lees, 1988*a*, *b*; Treadgold and Reynolds, 1989; Duke, 1991; Guy, 1993) and is an example, not only of the problems raised in defining saturation, but also of the strategic response that retailers will need to consider (Alexander and Morlock, 1992). Saturation also raises the issue of how the entry of non-domestic operators into the market alters an understanding of saturation and how formats and format saturation may be described.

Motives

Saturation lies at the heart of the debate behind the reasons for internationalization. If internationalization is principally the result of 'limited opportunities for sustained domestic growth' (Treadgold, 1988: 8), then, clearly, an appreciation of the issue of saturation is fundamental to the understanding of internationalization. However, what is meant by saturation, within both the academic and the commercial world, appears at times to be something of a matter of personal choice (Guy, 1993). Even if an opposing view is taken that the major motive behind internationalization is predicated on an 'internationally appealing and innovative offering and growth oriented and proactive motives' (Williams, 1992*a*), the issue of saturation remains important in terms of recognizing such a proactive rather than reactive response.

Two schools of thought had emerged by the mid-1990s (Alexander, 1995). The first made the assumption that saturation is the primary reason for international activity (Treadgold, 1988; Salmon and Tordjman, 1989), while the other saw internationalization as fundamentally a response to opportunities in the international marketplace (Alexander, 1990*a*, *b*; Williams, 1992*a*, *b*). In this context, a retailer's reactive or proactive responses to the international market will be the product of the macro- and micro-stages of industry and company development.

International retailing in the late 1960s and early 1970s went through a period of growth. Large retailers based in the European market sought expansion opportunities in international markets. This may have been largely a reaction to the effects of market saturation in the domestic market, a product of general economic developments that saw a sizeable number of retailers reach national coverage for the first time. It may also have been a product of retailers' lack of sophisticated response to the opportunities in the international environment and ability to cope with the new challenges that this entailed (Alexander, 1997).

Thus both macro- and micro-factors may have led to an essentially reactive rather than proactive period of internationalization. However, by the late 1980s, retailing entered a period of internationalization that was increasingly characterized by proactive motivations,

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as international retail structures began to emerge, and retailers' internal organizational development and, in some cases, experience of international activity, sustained a more sophisticated, proactive response to the international environment.

New Themes in International Retailing Research

From the mid-1990s new themes in international retailing began to emerge. In this third phase of sustained research, interest began to focus more on how the international retail firm behaved in international markets. Increasingly, conceptual issues came to the fore and research began to focus in more depth on particular themes through the use of diverse methodological approaches.

Conceptual Development

Apart from the early work of Hollander (1970), Treadgold (1988), Salmon and Tordjman (1989), and Pellegrini (1991), the conceptualization of retail internationalization was relatively underdeveloped until the mid-1990s. Having developed the body of knowledge explained above, the discipline was now able to begin to conceptualize the process and elements of retail internationalization. Simpson and Thorpe (1995) introduced their Product, Lifestyle, Image, Niche (PLIN) model, which focused on specialist retailers, while Sternquist (1997) attempted to bring together a range of theoretical perspectives in her Strategic International Retail Expansion (SIRE) model. However, it was really not until 2000 and the work of Vida, Reardon, and Fairhurst (2000) and Alexander and Myers (2000) that attempts were made to conceptualize the international retail process from a retail-specific perspective. The development of the conceptualization of international retailing is a theme the book returns to in detail in Chapter 3.

The Changing Nature of Retailers under Study

While historically the large grocery retailers dominated the study of international retailing, the late 1990s and early 2000s saw the emergence of research on the internationalization of the fashion sector. Dawson (1994), Fernie *et al.* (1997), and Doherty (2000) all recognized that fashion retailers are very well suited to internationalization, given their small format and their ability to exploit economies of scale through outlet replication. Work by Fernie *et al.* (1997), Fernie, Moore, and Lawrie (1998), and Moore (1997, 1998) largely set in motion a growing body of work on the internationalization of fashion (Waarts and van Everdingen, 2006), particularly luxury fashion (Moore and Birtwistle, 2004, 2005; Matthiesen and Phau, 2005; Moore and Doherty, 2007; Wigley and Moore, 2007). While these authors pushed the fashion agenda forward, the food sector still remained a focus of attention, with work on Ahold (Wrigley and Currah, 2003; Palmer and Quinn, 2007) and Tesco (Palmer, 2004, 2005; Rogers, Ghauri, and George, 2005) being particularly prevalent.

During this time, the focus on larger format retailers (Arnold and Luthra, 2000; Guy, 2001) such as Home Depot (Hernandez, 2003; Bianchi and Arnold, 2004) and Wal-Mart

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(Arnold and Fernie, 2000; Colla and Dupuis, 2002; da Rocha and Dib, 2002; Serpkenci and Tigert, 2006) has intensified. At the other end of the size continuum, the internationalization of smaller, specialist retailers has also become the source of academic attention (Hutchinson, Quinn, and Alexander, 2005, 2006; Hutchinson, Alexander, Quinn, and Doherty, 2007; Picot-Coupey, 2006). Finally, the advent of the internet has brought an entirely new dimension to the internationalization of a retailer's operations. E-tailers such as Amazon and Net-a-Porter are now household names yet academic research on this topic remains in its relative infancy (Foscht, Swoboda, and Morschett, 2006).

Chapter 4 will return to more detailed discussion on the retailers that have contributed to the growth in international retail activity.

Emerging Markets

While early work on the internationalization of retailing involved the descriptive accounts of international movement and activities of retailers in the US, Europe, and Japan, the fall of communism in the 1990s saw the Eastern bloc countries become a focus of research attention (Clarke-Hill, Robinson, and Foot, 1992; Drtina, 1996; Myers and Alexander, 1997). Eastern Europe continues to be a source of practical and research interest (Rogers, Ghauri, and George, 2005), with Russia emerging as a key market for international retailer expansion (Roberts, 2006). The Middle East has also emerged as a major destination for retailers, with many UK retailers in particular developing significant businesses in the region (Jones, 2003). While many retailers are entering the emerging markets in South America, particularly Brazil and Chile, academic research remains relatively limited (Alexander and de Lira e Silva, 2002; da Rocha and Dib, 2002; Bianchi and Arnold, 2004; Bianchi and Mena, 2004; D'Andrea *et al.*, 2006). In South-East Asia (Alexander and Myers, 1999), China (Samiee, Yip, and Luk, 2004; Sternquist and Chen, 2006; Liu, 2007) and Korea (Suri, Manchanda, and Lee, 2004; Choi and Park, 2006) continue to attract increasing international retail competition, with China in particular enjoying increasing investment from retailers from all over the globe.

Currently, therefore, the key markets for retailers internationalizing their concepts are Russia, India, and China, but academic research is still trying to keep pace with the rate of these practical developments. Research on these markets, however, is destined to grow significantly in the immediate future. Chapter 5 will turn its attention to the evolution and development of expansion patterns by international retail firms, including these emergent and growing worldwide centres of development.

International Market Entry Methods

By the late 1990s, it was becoming clear that, while the literature was providing a much greater appreciation of *why* retailers internationalized and *where* they internationalized, there remained a distinct gap in our understanding of *how* retailers move into international markets. Work by Doherty (1999) explored theoretical reasons behind entry mode choice, while a growing body of work began to emerge on the franchising mode of operation in particular (Quinn, 1998*a*, *b*, 1999; Doherty and Quinn, 1999; Petersen and Welch, 2000; Quinn and Doherty, 2000). This body of work is still emerging (Doherty and

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Alexander, 2004, 2006; Doherty, 2007). Merger and acquisition activity, particularly in the grocery sector, also received specific attention, much of which came through Wrigley's work on Ahold and Sainsbury (Wrigley, 1997*a*, *b*, 1998, 2000, 2002). More recently, joint ventures have warranted specific study (Palmer and Owens, 2006). Broadly speaking, those studies that focus on merger, acquisition, and joint venture activity tend to focus on the food sector and larger format big box retailers. Franchising and wholesaling, on the other hand, are more prevalent amongst the fashion sector and smaller, specialist retailers (Doherty, 2000; Moore, Birtwistle, and Burt, 2004; Hutchinson *et al.*, 2007). As will be explored further in Chapter 11, flagship stores also act as a conduit to market, albeit with many different purposes than the traditional entry methods noted above (Moore and Doherty, 2007).

Portfolio Restructuring and Divestment

Throughout the development of international retail research, the focus was predominantly on the investment activities of retailers in international markets, which, by implication, meant a forward and upward trajectory. The early years of this millennium witnessed an increasing acknowledgement that many retailers do not have entirely successful experiences when they move into international markets. Consequently, a growing body of work has emerged on divestment in international markets. Initial work by Alexander and Quinn (2000, 2001, 2002) identified research gaps in this area, particularly the need for a conceptualization of the divestment process and the growing need to investigate the relationship between international and domestic divestment and the strategic value of divestment. This work was followed by studies on Marks & Spencer (Burt *et al.*, 2002; Jackson and Sparks, 2005), Ahold (Wrigley and Currah, 2003; Palmer and Quinn, 2007), Tesco (Palmer, 2004, 2005), and Boots (Burt *et al.*, 2005). While the single case approach has hitherto dominated this growing research area, more recent studies have attempted to determine the extent and dimensions of international retail activity (Burt, Dawson, and Sparks, 2004; Alexander, Quinn, and Cairns, 2005). As a burgeoning research area, this work contributes significantly to our understanding of the process of internationalization by retail firms. The research area has moved from early, somewhat naïve, considerations of divestment as mere failure (Burt, Dawson, and Sparks, 2003), to a position that examines the learning inherent in divestment (Palmer, 2005) and the consideration of the process of divestment in its entirety (Cairns *et al.*, 2008).

Chapter 14 expands on the emergent theme of portfolio restructuring and divestment in the international retailing context.

Methodological Diversity

Like all developing subject areas, the internationalization of retailing has developed and explored a range of methodological approaches to the study of the subject area. Initial contributions such as that of Hollander (1970) were descriptive accounts of observations of international retailing. Early conceptualizations such as that of Treadgold (1988) were also based on observation, while the descriptions of the international experiences of individual companies such as Louis Vuitton (Laulajainen, 1992) were also based on secondary data.

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It was really not until the early 1990s when work began to emerge on motivations for internationalization (Alexander, 1990*a*, *b*; Williams, 1992*a*, *b*) that the area saw the development of research based on primary data. This work was questionnaire-based covering a range of retail firms. Such questionnaire-based survey work continued throughout the 1990s (Myers and Alexander, 1997) and into the new millennium (Maharajh and Heitmeyer, 2005). Database development such as Burt's work (1993) on the internationalization of British retailing and Fernie *et al.*'s studies (1997, 1998) on the internationalization of luxury brand retailers provided alternative methods of data collection. More recently, Alexander, Quinn, and Cairns (2005) adopted a database approach to provide some initial findings on international retail divestment activity. These survey and database approaches, along with descriptive and observational methods, have provided a strong basis for the development of the domain.

The late 1990s witnessed a move towards more qualitative methods in the attempt to explore emerging issues in-depth. Moore (1997) employed qualitative in-depth interviews to examine the internationalization of eight French fashion retailers. Doherty (2000) also employed a similar approach. Quinn's work (1998*a*, 1999) provided evidence from an ethnographic study of one natural cosmetics retailer's international franchising activities. The case study method has also come to the fore with Doherty and Alexander (2004, 2006), Hutchinson, Quinn, and Alexander (2006), Moore, Birtwistle, and Burt (2004), and Palmer (2004, 2005), all employing the method to investigate a range of issues, including international retail franchising, divestment, learning, conflict, and SME retail internationalization.

In summary, a range of methodological approaches has now been employed that informs and strengthens our knowledge base and provides a robust platform for the future development of the discipline.

SUMMARY

International retailing has become an important subject of study as international retailers have become an increasingly important component in the internationalization of consumer culture and the international distribution of services and products. The subject area has developed considerably in this time and remains a dynamic subject today. This chapter has established what international retailing is, what has been studied, and how it is being studied, and has begun to explore key aspects of the subject that will be considered in greater depth in the following chapters.

NOTES

1. For a description of how this seminal book came to be written, please see Hollander (2000).
2. Charles Waldman, at the time of the publication of his book, was Associate Professor at the École Supérieure des Sciences Économiques et Commerciales (ESSEC) in France. However, the text had its origins in his doctoral thesis presented at Harvard University.

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QUESTIONS

1. How is international retailing defined?
2. Within the organization, which activities do not indicate international retailing and which activities do represent international retailing according to Vida, Reardon, and Fairhurst (2000)?
3. What distinguishes the internationalization of retailing from international retailing?
4. List and describe the international boundaries of which retailers have to be aware.
5. What were the key international retailing research themes that emerged in the 1990s?
6. How have international retailing research themes and the methodological approaches changed since 2000?

ASSIGNMENTS

1. Explore the web sites of retailers that are based in your local market or visit the branches of international retailers and domestic retailers that operate in your domestic market.
   (*a*) Where do they say they source their products?
   (*b*) Are international retailers more likely to source from international markets than retailers operating in their domestic market?
2. Choose a selection of markets from around the world. Using a matrix where international market boundaries are listed down the vertical axis and the markets are listed across the horizontal axis, try to identify which markets share common characteristics and which do not. With respect to these international markets, which boundaries prove the most problematic when evaluations are made about market differences or similarities?

CASE STUDY

Whole Foods Market

Whole Foods Market is a US-based food retailer specializing in natural and organic food. As of 30 September 2007, the retailer operated 276 stores organized into 11 geographic operating regions; 263 stores in the US, 7 stores in Canada, and 6 stores in the UK (Whole Foods Market, 2007).

Whole Foods Market opened its first store in Austin, Texas, in 1980. Founded by John Mackey (now the CEO) and Renee Lawson Hardy, owners of Safer Way Natural Foods, and Craig Weller and Mark Stiles, owners of Clarksville Natural Grocery, these pioneers anticipated, well in advance of the competition, the consumer's growing appreciation and demand for organic and natural food. Whole Foods Market has brought organic food to the mass market, and its stores are destination shopping experiences (Rigby, 2007*a*). According to Rigby (2007*a*):

> 'Its aisles juxtapose South Pacific breadfruit, cockles and handmade crackers. Vegetables and fruits are piled into baskets as if just plucked from the field. Whole Foods has changed

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> the way Americans view organic and natural foods, taking it into the mainstream. If the company succeeds in the UK, it could blow apart the dominance of the traditional supermarkets in the burgeoning organic food sector.'

Whole Foods Markets began its domestic US expansion into Louisiana in 1988 and California in 1989. The company's subsequent US growth was based on a range of mergers and acquisitions such as those with Well Spring Grocery, North Carolina, Bread and Circus, Massachusetts and Rhode Island, Bread of Life, Northern California, and, most recently, with Wild Oats, a major US competitor.

In terms of its international operations, Whole Foods Market is still a young company. As with many US retailers, Whole Foods Market's first foray into the international arena was a cross-border move into the Canadian market in 2002. Its Canadian operations are concentrated in two states: 2 stores in Ontario (Oakville and Toronto) and 4 stores in British Columbia (Vancouver, 3; West Vancouver, 1).

The year 2004 marked the company's first entry to the UK market, when it acquired the six 'Fresh and Wild' stores that operate in London (Camden, Soho, Notting Hill, Clapham Junction, Stoke Newington) and Bristol (Whole Foods Market, 2008). This acquisition paved the way for Whole Foods Market to study the UK consumer's growing desire for organic food that ultimately led to the June 2007 grand launch of the Whole Foods Market fascia in Europe (Sherrell, 2008). The retailer chose the upmarket area of Kensington in London as its first location, having acquired the 80,000 square foot Barker's department store building in 2005. This statement London flagship store is Whole Foods Market's equal largest store (along with its headquarters in Austin, Texas) and testament to its intention to conquer the European consumer with its natural and organic foods supermarket offering.

The three-storey flagship store, the UK's largest dedicated food store, also houses a wine shop, bakery, charcuterie, cheese shop, and a bar selling organic beer, as well as eleven restaurants and takeaways. The dining experience is the key differentiator between the London store and any of its North American stores, because the retailer has been able to acquire a licence to sell alcohol. According to David Lannon, the executive in charge of the European expansion: 'We simply could not do anything like this back home' (cited in Lander, 2007: 5). Herein lies a key issue that retailers must take into consideration when moving into international markets: regulation. In this case the regulatory environment proved to be very favourable, allowing Whole Food Markets a competitive advantage in the market. Indeed, with its dining experience, certain commentators are comparing its offer, not to the UK domestic grocery rivals such as Tesco, but the premium end food halls belonging to London's exclusive department stores such as Fortnum and Masons, Harvey Nichols, and Harrods (Lander, 2007).

That said, the arrival of Whole Foods Market is creating competition in the UK grocery market for share of the growing organic food market. The large UK grocery retailers, Tesco, Asda, Sainsbury, and Morrisons, are all busy building market share in this lucrative and expanding area. According to the Institute of Grocery and Distribution, UK shoppers spent £1.6 billion on organic products in 2006 and this figure is predicted to rise to £2.4 billion by 2011 (Rigby, 2007*b*). Waitrose, which entered the organic market earlier than other retailers,

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currently has an 18 per cent market share, despite its modest 3.6 per cent of the overall grocery market. Marks & Spencer has a 7 per cent share of the organic market (Rigby, 2007*b*). While Waitrose has traditionally been seen to be an upmarket food retailer located predominantly but not exclusively in the south of England, its recent announcement to open 180 premium fresh food supermarkets is an acknowledgement of its determination to grow its market share and compete head-on with the incomer Whole Foods. It would seem, from comments by David Lannon, that Whole Foods Market has major plans for expansion in the UK. According to him, the UK has the same demographic group as that of California in terms of population and wealth. Whole Foods Market operates forty-five stores in California alone. Given these statistics, it is interesting to note that Tesco chose California as a location to enter the US market with its fascia 'Fresh and Easy', where it now competes with Whole Foods Market on its home territory.

Whole Foods Market is still expanding in its domestic market, yet it is seeking opportunities to expand its niche offering to the international marketplace. Its motto, 'Whole Foods, Whole People, Whole Planet', has connotations of global domination.

Whole Foods Market's arrival in the UK would seem to have impacted competitors, consumers, and suppliers alike. This demonstrates the impact of international retailing—all this with the arrival of one new shop.

Case Study Questions

1. What factors could be motivating Whole Foods Market to internationalize its operation?
2. Discuss the reasons for Whole Foods Market's international market selection location decisions.
3. How is the arrival of Whole Foods Market in the UK likely to impact on existing competition in the market?
4. Which companies would you consider Whole Foods Market's direct competitors in the UK? How have these companies responded to the entrance of Whole Foods Market?

Case Study Assignment

1. Compare and contrast Whole Foods Market's entry into the UK with Tesco's entry into the US.

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