Drivers and barriers for city shopping: Perspectives from retailers and consumers in regional Australia

The decline of retailing in cities is well documented in the international literature, but to date there has been little research in Australia. The objective of this study, conducted in regional Australia, is to examine drivers and barriers for city shopping, and motivations for out-of-town shopping. Surveys were administered to retailers and city shoppers. Qualitative data were analysed using Leximancer to draw out relevant themes and concepts. Responses (*n*=367) show store variety, customer service, car parking and the overall offering and experience are important drivers of city shopping, whilst expensive parking, empty shops, lack of amenities and store variety are commonly cited barriers.

Keywords

Keywords: retail, cities, consumer behaviour

1.0 Introduction

> *Right across Australia, bricks and mortar retailers are struggling as big international brands move in and online shopping reigns. Even high streets in major capital cities are battling high vacancy rates. The worst hit cities are regional ... where shopping centres have been built in suburban areas outside the CBD* (Terzon et al., 2018).

Towns and cities around the world, are experiencing declining footfall and the closure of retail stores and other businesses (Mortimer, Grimmer et al., 2020). Even prior to COVID-19, ‘high street’ and ‘main street’ retailers were facing increasing competition from online shopping, out-of-town ‘big box’ and ‘power centre’ developments, and suburban shopping centres and malls (Millington and Ntounis, 2017; Theodoridis et al., 2017).

Retailing is an essential social, economic and cultural activity, and a strong retail sector makes a significant contribution to local communities and to local, state and national economies (Calderwood and Davies, 2012; Clarke and Banga, 2010; Grimmer et al., 2018). However, increases in the array and availability of products with accompanying price transparency, the globalisation and expanding dominance of large retail chains, tremendous growth in online sales, rapid advances in communication and distribution technologies, and turbulent economies, have all contributed to a volatile and competitive environment for traditional bricks and mortar retailers, particularly small firms (Byun et al., 2020; Evans, 2011; Grimmer et al., 2017). The trading environment for retailers of all sizes is also significantly impacted by the COVID-19 health and economic crisis (Mortimer, Bowden et al., 2020; Roggeveen and Sethuraman, 2020).

Business failures are affecting city retail precincts as many shoppers stay away, showing a preference for shopping online or in out-of-town centres. As stores close and people lose employment, the future of retail as a primary driver for city visitation is uncertain (Mortimer, Grimmer et al., 2020; Tunca and Anselmsson, 2019). Clearly, few retail stores exist in isolation (Hart et al., 2013) so retail agglomeration in cities is important for individual business success (Teller and Elms, 2012; Teller, Alexander et al., 2016), and for contributing to the broader economic prosperity for city and town centres. Therefore, marketing the attractiveness of city shopping areas is vital in order to appeal to consumers, attract patronage and ensure town centres can continue to contribute to the economic health of towns and cities around the world (Ryu and Swinney, 2011).

The impact of diminished ‘high streets’ and ‘main streets’ on local communities has, for some time, been the focus of scholars in the United Kingdom (e.g., Bennison et al., 2010; Parker et al., 2017; Runyan and Huddleston, 2006; Warnaby et al., 2002; Wrigley and Dolega, 2011), Europe (e.g., Morandi, 2011; Saraiva et al., 2019; Teller, Wood et al., 2016), and the United States (e.g., Bias et al., 2015; Giusti and Maraschin, 2017; Mehaffy and Haas, 2019; Talen and Jeong, 2019). But to date in Australia, there has been little research on the ‘wicked problem’ of the decline of retailing in towns and cities and the efforts undertaken to contribute to retailer resilience and the revitalisation of retail precincts. To fill the gap, this paper presents the findings of an exploratory study conducted in a regional Australian town (Launceston, Tasmania) investigating the drivers and barriers for city shopping and the factors that encourage out-of-town shopping (e.g., at suburban shopping centres).

The paper is organised as follows. After this introductory section, a brief description of the research context is provided. This is followed by a review of the literature on ‘shopping situation’ and consumer choice of shopping location, the decline of the high street, and subsequent efforts to revitalise city and town centre retail. The method, results and discussion are then presented, and the paper concludes with a summary of the main findings, limitations, contribution to theory and practice, and suggestions for future research.

2.0 Research context

The Australian retail industry is the second largest employing sector in the country, providing work for around 12% of the population (1.9 million people). There are approximately 132,000 retail businesses throughout the country (Australian Bureau of Statistics, 2020) and reflecting this, the sector makes a significant contribution to Australia’s economic output. The retail industry is diverse in Australia, with considerable difference between retailers in terms of business size, format, and offerings; importantly, these differences are further highlighted across different regions around the country.

Throughout 2018 and 2019 the Australian retail industry was significantly affected by store closures of many well-known retail brands. Several factors contributed to a difficult trading environment, including a flat economy, low wage growth and low levels of discretionary spending. In addition, consumers are increasingly changing the way they shop (i.e., the number of people shopping online is increasing) and many retailers are struggling to effectively respond to this change (Bock et al., 2012; Devereux et al., 2020; Taneja et al., 2014; Wang et al., 2016). Store closures and job losses have been exacerbated in 2020 as a result of COVID-19. The impact of the virus has also accelerated the shift to online shopping and affected *where* consumers choose to shop when seeking physical store retailing options. Increasingly, consumers across Australia are choosing to shop more locally in suburbs outside city centres (Cummins, 2020; Grimmer and Mortimer, 2019; Maginn and Mortimer, 2020; Mortimer, Grimmer et al., 2020).

The challenges facing the broader Australian industry also apply to retailers and shopping precincts in the state of Tasmania where the research presented in this paper was conducted, as well as in other regional towns and cities across the country. In Australia, a town, city, or area, is considered ‘regional’ if it is outside the major capital cities of Sydney, Melbourne, Perth, Adelaide and Canberra. Almost 9.5 million people live in regional Australia, and regions provide employment for one in three working Australians and contribute one third of the nation’s output (Regional Australia Institute, 2021).

Tasmania is the southern Australian island state with a population of just over 520,000. Compared with mainland Australia, it has a relatively small (and aging) population with low population growth, higher rates of unemployment and underemployment, low socioeconomic status indicators, and low rates of private and government investment. There are just over 2,000 retail businesses operating throughout the state (Australian Bureau of Statistics, 2020). The city of Launceston in the north of the state has a population of 67,449 and the local council ('City of Launceston') has responsibility for an area of 1,414km^2 including the central business district. There are approximately 250 retail and service businesses operating in the CBD and the council is responsible for marketing the city as an attractive destination for visitors, shoppers, workers and tourists.

3.0 Literature review

3.1 Shopping situation and location choice

Shopping is a complex social activity (Morandi, 2011) which is constantly influenced by various changing socio-economic factors (Hart and Dale, 2014; Vaughan and Valerie, 2009) and by the characteristics of different retail environments (Pecoraro and Uusitalo, 2014). A critical factor affecting consumers' selection of physical shopping location is the *shopping situation* in which they are involved (Reutterer and Teller, 2009). Three categories of shopping situation are: convenience, comparison, and specialty shopping (Levy et al., 2019). When consumers are engaged in convenience shopping, they are primarily concerned with minimising effort to obtain a particular product or service. Out-of-town shopping centres provide customers with high levels of convenience (Reimers and Clulow, 2004) and accessibility by locating centres close to where people live, providing easy access via free and plentiful car parking and providing an agglomeration of retail stores (including supermarkets), services and eateries (Teller and Schnedlitz, 2012).

Consumers undertaking comparison shopping have an idea of the product they want, but do not necessarily have a strong preference of the brand, model or retailer. 'Big-box' developments, enclosed malls or shopping districts devoted to particular types of merchandise (e.g., electronics, homewares, furniture) facilitate comparison shopping activities by locating outside cities and towns, providing ample and free car parking and grouping big-box or 'category killer' retailers in one location. The impact of the entrance of big-box retailers on local retailing varies, with some studies finding positive effects (e.g., Artz and Stone, 2012; Han et al., 2018) and others confirming negative impacts (e.g., Merriman et al., 2012) on existing individual retail stores and shopping precincts.

Customers engaged in specialty shopping know what they want and are unwilling to accept a substitute. They are brand- or retailer-loyal, will pay a premium or expend extra effort to purchase exactly what they desire and will visit stores that may be situated in inconvenient locations (e.g., city centres). Whilst towns and city centres provide ample opportunities for consumers wanting to undertake specialty shopping activities, suburban shopping centres/areas predominantly satisfy convenience shopping behaviours, particularly through the provision of supermarkets, butchers, bakeries, and so forth, all in one place.

The problem for city centre retailing is that in addition to providing free and plentiful parking and undercover shopping, out-of-town shopping centres and 'big-box developments' are expanding their offerings by including cafes and restaurants, more supermarket options, expanding the variety of retail stores and the providing of a range of additional services. Suburban shopping centres and malls, which already cater to 'convenience' shoppers, and 'big-box' developments catering to comparison shoppers, are progressively attracting speciality shoppers through the expansion of their offerings, in particular the range and type of retail stores (Teller and Schnedlitz, 2012). The result is that consumers are increasingly being enticed away from city and town centre retailing (Maginn and Mortimer, 2020; Mortimer, Grimmer et al., 2020).

Arguably, it is much easier for managed shopping centres and malls to control the tenant mix via careful merchant selection (and rejection), and placement policies (Litvin and Rosene, 2017), than it is for local authorities and city planners responsible for managing complex public (as opposed to 'private') retail spaces with separate retail units owned and managed by individual property owners. This presents a significant challenge for cities and towns seeking to balance retail development in individual communities (Bruwer, 1997; Litvin and DiForio, 2014).

3.2 The decline of the high street and efforts to revitalise city retailing

Historically, central city and town locations have provided retailers with a number of advantages including the ability to leverage visitation from shoppers and workers who are drawn to the area during business hours, high levels of footfall on weekdays as well as on weekends, workers travelling in to the city via public transport, tourists and business visitors, as well as residents who live in the city. Accordingly, town centres are regarded as vitally important for contributing to local economies and activating communities (Portas, 2011), and while services, culture, entertainment and public services are important (Millington, et al., 2015), it is retailing that predominantly draws visitors and shoppers. At the same time retailing also most visibly illustrates the changes taking place in town centres – notably when shops close and leave behind vacant rental units (Portas, 2011; Saraiva et al., 2019).

Over the past two decades high streets, main streets and city centre retailing has declined, with consumers abandoning city shopping in favour of online shopping, or shopping out-of-town (Haltiwanger et al., 2010), and this has been accelerated further by the COVID-19 pandemic which has seen consumers favour suburban centres over city retailing as more and more people work from home and shop closer to where the live (Distasio, 2020;

Maginn and Mortimer, 2020; Mortimer, Grimmer et al., 2020). The deterioration of high street and main street shopping has been the focus of government, industry and scholarly attention predominantly in the UK, Europe and the United States, where studies have sought to document the challenges facing city retailers. The UK government, in particular, has been very active in seeking to identify and address the challenges facing UK high streets and towns and city centre retailing.

> *…traditional high streets are under threat not just from the growth of internet shopping, but also out-of-town shopping…If high streets are left to wither, that leaves a hollow space running right through the heart of our communities; where there should be a bustling, thriving place for people to gather*
> (Department for Communities and Local Government, 2013, p. 3).

Scholars and practitioners have sought to identify factors that consumers, traders, local authorities and other key stakeholders consider to be important for the long-term sustainability and viability of town and city retail centres (e.g., Dobson, 2015; Hospers, 2017; Millington et al., 2015, 2018; Rao and Summers, 2016). In particular, the retail sector in the UK has long been characterised by sequential periods of change (Parker et al., 2017; Theodoridis et al., 2017), and the UK government has commissioned a series of reports from high-profile practitioners and industry experts (e.g., Grimsey et al., 2013, 2018, 2020; Portas, 2011) to document the decline of the high-street and the deterioration of city centre retailing and to make recommendations about its recovery. More recently, the UK Government's 'High Street Report' (2018) recommended town centres should be developed as 'community hubs' which consist of leisure and social services sitting alongside retail and residential property. This approach is also considered in the US in terms of revitalising downtown areas and main street retail areas (e.g., Distasio, 2020; Bias et al., 2015; Talen and Jeong, 2019).

Various academic studies and government and industry reports have identified factors that influence the performance of high streets, for example, those that improve vitality and viability of shopping precincts, including opening hours, visual appearance, the retail offering, leadership and service quality (Parker et al., 2016). Teller and Elms (2012) identified key factors including the retail tenant mix, atmosphere and sales personnel which contributed to the attractiveness of retail precincts.

Given the importance of the retail mix in contributing to retail place attractiveness, scholars have investigated drivers for retail agglomeration from the perspective of retail tenants. These include accessibility for customers (Arentze and Timmermans, 2001), geographical location (Teller and Schnedlitz, 2011), availability and cost of parking (Teller and Schnedlitz, 2011; Van der Waerden et al., 1998), mix and attractiveness of retail stores (Chebat et al., 2010; Mehaffy and Haas, 2019), provision of entertainment facilities and service stores (Tsai, 2010), and accessibility (Teller and Schnedlitz, 2011).

Despite the many challenges facing city retail precincts, it is clear these areas are still an essential part of local communities and economies (Distasio, 2020). From a retail-centric perspective, city centres will need to attract a mix of large chain stores and international retailers, as well as small, independent, locally owned stores (Mehaffy and Haas, 2019). Small stores contribute to local communities by providing a variety of goods and services, employment opportunities, and an alternative to the offerings from multinational corporations (Grimmer and Mortimer, 2019). Small retailers add interest and 'flavour' to local shopping areas and contribute to the viability and vitality of city centres as well as smaller shopping areas (Coca-Stefaniak et al., 2005, 2010; Parker et al., 2016; Parker, Ntounis, Quin, et al., 2016). In this regard, local authorities and marketing organisations are increasingly seeking to balance the mix of chain and local stores in shopping precincts to better align with resident and visitor demographics and to better attract and retain visitors (Litvin and Rosene, 2017).

One of the challenges for ensuring the ideal retail mix in city centres is the number of 'curator's (or governance structures) involved in the process, including local government, independent marketing and business associations, public-private partnerships and local community groups (Mehaffy and Haas, 2019). In addition, 'hybrid' entities such as Business Improvement Districts (BIDS) (also referred to as business revitalisation zones, business improvement areas, community improvement district, etc.) are common in the UK and the US (Donaghy et al., 2013; Grail et al., 2019; Hogg et al., 2003, 2007; Justice and Skelcher, 2009). BIDS are developed by the local authority and have the power to collect funds from landlords for various infrastructure improvements and marketing programs (Berry et al., 2010; Mehaffy and Haas, 2019). The evidence from the UK and the US suggests that whilst BIDs, and similar programs, have worked successfully in many locations, in terms of measuring the performance of various programs there are conceptual and methodological challenges often related to the intersection of national trends, local circumstances and other factors, as well as the recognition there is no 'one-size fits all' standard mode of operation for precincts adopting BIDs (Donaghy et al., 2013).

Car parking is a significant issue for retail precincts globally where policies aimed at deterring car usage to address traffic congestion and global warming, and to improve health outcomes, have often failed to achieve their objectives and put the retail sector at risk (Reimers, 2013). At the same time, to improve city shopping precincts, many cities are electing to reduce or even ban cars and car parking in city centres, increasing bike lanes, improving walkability and introducing street dining, parklets and other activations designed to reduce car traffic in towns and cities (Croeser, 2020).

Baker and Wood (2010) propose a vacancy rate of more than 10% signals problems in shopping precincts, with more than 20% empty stores representing significant structural issues. Alternatively, some authors argue that empty shops are actually 'healthy' for urban areas (Saraiva et al., 2019), by representing dynamic economic conditions and increased competition through shifting tenancies (Katyoka and Wyatt, 2008) or by contributing to CBD areas becoming more compact (Whysall, 2011). Overall, however, vacant stores are considered to have a negative impact on shopping areas where they represent business 'failure' and a downturn in economic fortunes (both for individual businesses and for the shopping area) (Teller and Elms, 2012). Vacant buildings may become derelict, and abandoned shops detract from the sense of place in local communities (Coca Stefaniak et al., 2005; Katyoka and Wyatt, 2008; Wrigley and Dolega, 2011), and drag down shopping areas (Ministry of Housing, Communities & Local Government, 2018).

When compared with the substantial body of scholarly output from retail researchers in the UK, Europe and the US, there has been much less focus on city and suburban shopping from retail academics in Australia. Arguably, Australian retailing differs in terms of the country's modest population (25 million) which is spread over a vast land mass (7.692 million km^2) and predominantly concentrated on the East coast of the country in just a handful of capital cities. In addition, Australia does not have a market town tradition, nor 'high street' or 'main street' shopping. Rather, the industry is made up central business district (CBD) shopping, large suburban shopping centres (e.g., Westfield) that operate in Sydney, Melbourne, Brisbane, Adelaide and Perth (Jahshan, 2019), out of town big box developments, and smaller neighbourhood shops usually clustered around a grocery store or supermarket. In addition, Australian grocery retailing is dominated by just two supermarket chains – Coles and Woolworths – which have around 70% market share (Grimmer, 2018), and just two department store chains – Myer and David Jones – which have both suffered reduced sales in past decade (Pallant and Sands, 2019). Arguably, overall Australian retailing was relatively buoyant in the years leading to 2018 and 2019 when the industry endured many high-profile national chain retail collapses around the country. Store closures affected city shopping areas and large suburban shopping centres, while smaller suburban shopping precincts were not as severely impacted due to the large proportion of smaller, independent stores in these areas.

Given the decline in city centre retailing over the past decade, town centre revitalisation is high on the agenda of local governments, retail marketing and membership organisations, and local chambers of commerce. In response to the dearth of research in this area which has been conducted in an Australian context, this study poses the question:

What are the drivers and barriers for city shopping in a regional Australian city?

4.0 Method

This exploratory study sought responses from city retailers and consumers about the various factors they believe encourage people to shop in the city, as well as factors that discourage visitation. Respondents were also asked about their motivations for out-of-town shopping (i.e., at suburban shopping centres).

The study involved primary research in the form of a paper survey administered to all retail businesses operating within the central business district area, and also involved an online survey for consumers (i.e., residents of the greater Launceston area who currently shop, or who have previously shopped, in the city). Survey questions for both groups were composed of a mix of subjective ranking questions, open-ended questions and Likert scales (retailers only).

The retailer surveys were administered using the ‘drop and collect’ method which involved hand delivering a survey package to every retail and service business within a specific CBD boundary and then one week later collecting completed surveys from each business. The drop and collect method has been shown to yield higher response rates from small business owners than mailed, online or telephone surveys (Ibeh et al., 2004; Stedman et al., 2019).

4.1 City retailers

Data was collected during 2019. Survey packages were delivered to retailers in the city (*n*=250) and collected one week later; a small number of traders mailed their survey back to the researcher. In total, 99 completed surveys were received, providing a response rate of 39.6%; an acceptable response rate for SME surveys is considered to be 15% (+/- 4%) (Woodside, 2014). Noting that SME researchers are frequently challenged by a reluctant population and low response rates (Billesbach and Walker, 2003; Dennis, 2003; Newby et al., 2003), the response rate from retailers in this study of almost 40% is very satisfactory, and the findings can therefore be generally applied across the population of interest. One returned survey was unusable, leaving a final usable sample of 98 surveys.

Table 1 shows the sample characteristics for the retailer survey. Respondents were asked to classify their business according to one of the nine Australian and New Zealand Standard Industry Classification (ANZSIC) retail sector classification codes (Australian Bureau of Statistics, 2013). In terms of retail classification, the two largest sectors to respond were clothing, footwear and personal accessories at 28.57%, and pharmaceutical and other store-based retailing at 11.22%. ‘No response’ may have indicated a business was not a retailing business (i.e., a service firm not represented in the ANZSIC retail codes). Respondents were asked how many years the business has traded in the city, with just over half of respondents trading between 6 and 25 years. A small proportion of respondents (7%) had been in business less than two years, and 1% did not answer this question. Non-employing businesses accounted for 4.08% of respondents who operated with no additional staff apart from the owner/manager. Micro-businesses, that is businesses with 1-4 employees, accounted for 43.87%; 2.04% of businesses employed volunteer staff in addition to the owner/manager.

	N	*%*
ANZSIC Code		
411 Supermarket and grocery store	0	0
412 Specialised food retailing	8	8.16
421 Furniture, floor covering, house wares and textiles	6	6.12
422 Electrical, electronic and gas appliances	1	1.02
423 Hardware, building and garden supplies	0	0
424 Recreational goods	8	8.16
425 Clothing, footwear and personal accessories	28	28.57
426 Department stores	3	3.06
427 Pharmaceutical and other store-based retailing	11	11.22
No response	33	33.67
Age		
Less than 2	7	7.14
2 – 5	14	14.28
6 – 15	28	28.57
16 – 25	23	23.46
26 – 50	17	17.34
51 and over	8	8.16
No response	1	1.02
Size		
Owner/Manager plus volunteer staff	2	2.04
Non-employing businesses	4	4.08
Micro (1 – 4 employees)	43	43.87
Small (5 – 19 employees)	44	44.89
SME (20 and over)	5	5.10
No response	0	0

Table 1. Retailer sample characteristics

4.2 City consumers

An online survey for consumers was facilitated by the local council via its online council survey portal on its website (www.launceston.tas.gov.au). This portal is used as a regular method of collecting data from consumers and rate payers in the City of Launceston, and so was considered the most likely to produce a reasonable sample size. Further, online surveys are a regular means of collecting commercial, policy and academic research data in Australia (Tharenou, Donohue and Cooper, 2007). The survey remained open for three weeks. A total of 268 usable responses were collected using this method. Respondents were 18 years of age or over, residing in the north and north east region of Tasmania, with the majority living in and around Launceston city and suburbs. There were 258 respondents (96.3%) who indicated they had shopped in the city centre in the six months prior to the survey.

5.0 Results

5.1 Assessment of retailing in the city

Retailers were asked to indicate their overall assessment of retail trade in the city using Likert scale items with response options ranging from 'positive with no room for improvement' through to 'negative with room for major improvement'. Approximately one quarter (22.44%) of businesses in the sample had a positive overall assessment of retail trade, with 13.26% reporting a neutral response and 62.24% reporting a negative overall assessment (Table 2).

Overall assessment of retail trade in the city	*n*	*%*
Positive with no room for improvement	0	0
Positive with room for some improvement	22	22.44
Neutral	13	13.26
Negative with room for some improvement	25	25.51
Negative with room for major improvement	36	36.73
No response	2	2.04
Total	*98*	*100.00*

Table 2. Retailer overall assessment of retail trade in the city

Retailers were also asked about how satisfied they were with the overall performance of their individual business using a seven-point Likert scale. The data shown in Table 3 indicate approximately 65% of retailers were satisfied with the overall performance of their individual business, with median satisfaction rating of 5 out of 7.

Retailer satisfaction (1 = very dissatisfied to 7 = very satisfied) with the overall performance of their individual business	*n*	*%*
1	3	3.06
2	1	1.02
3	14	14.28
4	12	12.24
5	28	28.57
6	23	23.46
7	13	13.26
No response	4	4.08
Total	*98*	*100.00*

Table 3. Retailer satisfaction with the overall performance of their individual business

A comparison was made between the question regarding retailers' satisfaction with the overall performance of their own business and the question regarding their overall assessment of retail trade in the city, and this is shown in Figure 1.

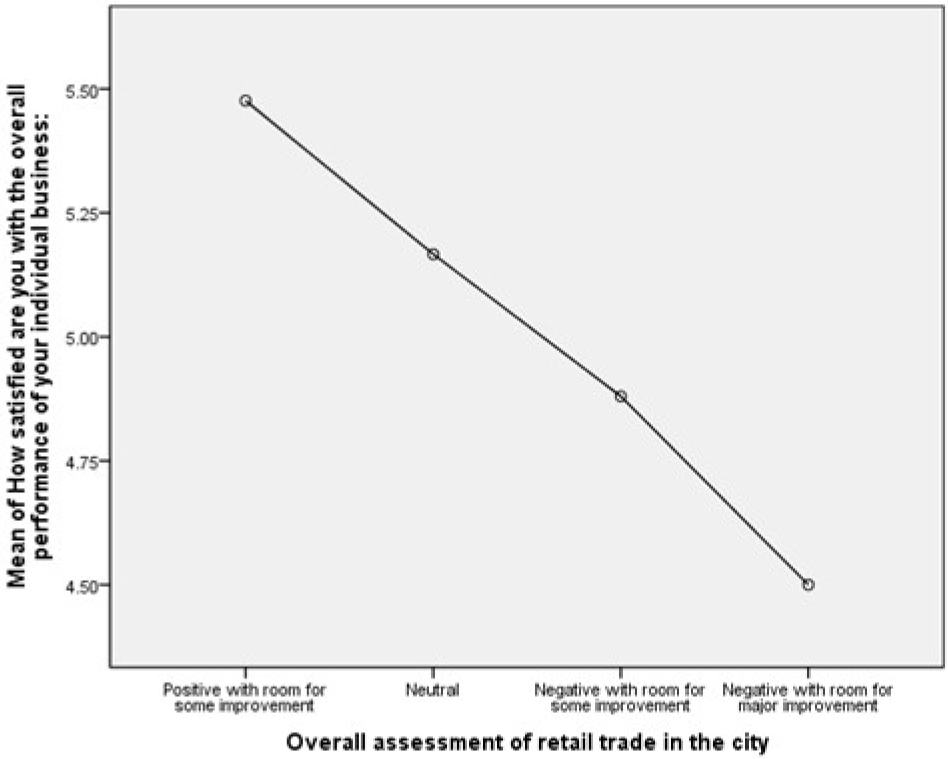

Figure 1. Retailer overall assessment of retail trade and individual business satisfaction

The trend line in Figure 1 shows that retailers whose overall assessment of retail trade in the city was positive, reported a higher level of individual business satisfaction compared with those whose overall assessment of retail trade in the city was negative.

Consumers were similarly asked to indicate their overall assessment of retail trade in the city using a Likert scale with responses range from ‘positive with no room for improvement’ through to ‘negative with room for major improvement’. Table 4 shows approximately one-third (34.69%) of consumers in the sample had a positive overall assessment of retail trade in the city, over an eighth (14.92%) were neutral, and approximately a half (50.36%) had a negative overall assessment.

Consumer overall assessment of shopping in the city	*n*	*%*
Positive with no room for improvement	5	1.86
Positive with room for some improvement	88	32.83
Neutral	40	14.92
Negative with room for some improvement	72	26.86
Negative with room for major improvement	63	23.50
No response	0	0
Total	*268*	*100.00*

Table 4. Consumer overall assessment of shopping in the city

In terms of the general assessment of retail trade in the city, higher numbers of retailers reported a negative assessment of trade in the city than did consumer respondents; 62% of retailers responded, 'negative with room for some improvement' or 'negative with room for major improvement', compared with 50% of consumer respondents.

Qualitative data were analysed using Leximancer (http://info.leximancer.com). Whilst SPSS remains the dominant tool to analyse quantitative data; there are a number of different tools available for qualitative data analysis (Sotiriadou et al., 2014). NVivo is the most commonly used qualitative data analysis software program (Jones and Diment, 2010), however, social science researchers are increasingly using Leximancer as an alternative tool (see for example, Brochado et al., 2019; Mao, 2020; Robson et al., 2013). Developed by researchers in the psychology department of the University of Queensland, Leximancer is a software program designed for analysing natural-language text data (Biroscak et al., 2017), including customer surveys (Leximancer, n.d.) as used in this study. Leximancer was selected for this study as it is suited to exploratory research, in this case it was particularly suitable as it has been shown to be valuable when researchers do not have an 'a priori' set of factors or a model to analyse the data (Sotiriadou et al., 2014). In addition, Leximancer is ideal for analysing large volumes of data and reducing research bias in terms of coder subjectivity and the software is reliable in terms of there being minimal manual intervention from the researcher (Sotiriadou et al., 2014). Leximancer 'automatically analyses [your] text documents to identify the high level concepts, delivering the key ideas and actionable insights [you need] with powerful models, interactive visualisations and data exports' (Leximancer, n.d.). One of the Leximancer outputs is a concept map on which sample characteristics can be overlaid.

> *Concepts in Leximancer are collections of words that generally travel together throughout the text. The concepts are clustered into higher-level 'themes' when the map is generated. The themes aid interpretation by grouping the clusters of concepts, and are shown as coloured circles on the map. The themes are heat-mapped to indicate importance. This means that the 'hottest' or most important theme appears in red, and the next hottest in orange, and so on according to the colour wheel.* (Leximancer, 2018).

Using statistics-based algorithms to extract semantic and relational information (Biroscak et al., 2017), Leximancer concept maps offer 'a visually attractive display of the key themes and concepts, their importance and proximity' (Sotiriadou et al., 2014). Concept maps were generated for the retailer and consumer groups for all qualitative survey responses.

5.2 Drivers for city shopping

Retailers and consumers were asked to nominate up to five factors they considered encourage people to shop in the CBD. Figure 2 provides the concept map showing the responses from retailers.

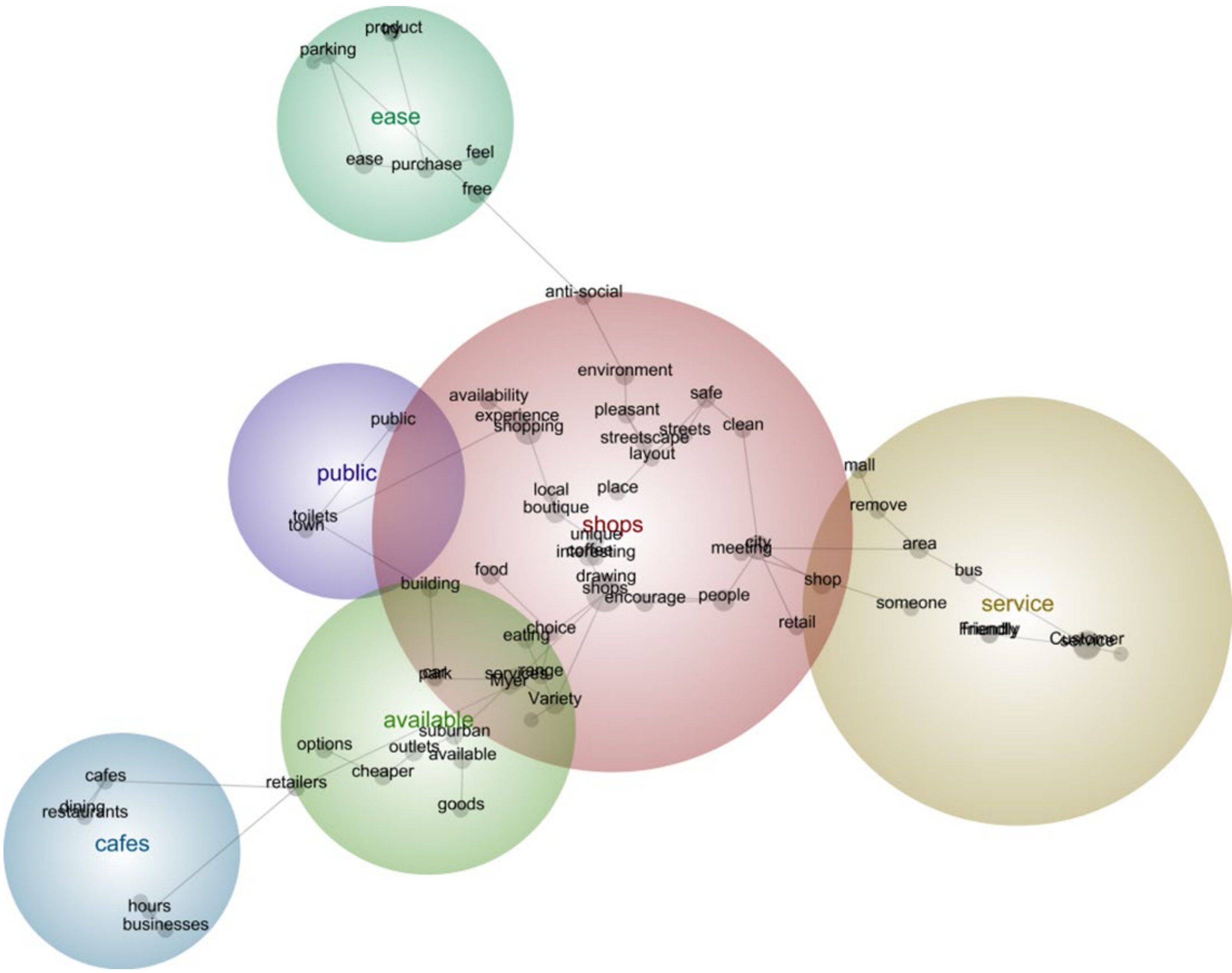

Figure 2. Retailer drivers for city shopping

The ‘hottest’ theme in the above figure centres around the *shops* in the city, and this encompassed a range of concepts including variety and range of stores, the unique offerings including independent boutiques, as well as related concepts such as pleasant and interesting experience, and availability of goods and services. The next most important theme concerns *service*, including concepts such as friendly and customer (oriented) service. The next theme of *available* picks up concepts including the availability of parking, retail options, food outlets, goods and services.

Figure 3 provides the concept map showing the responses from consumers.

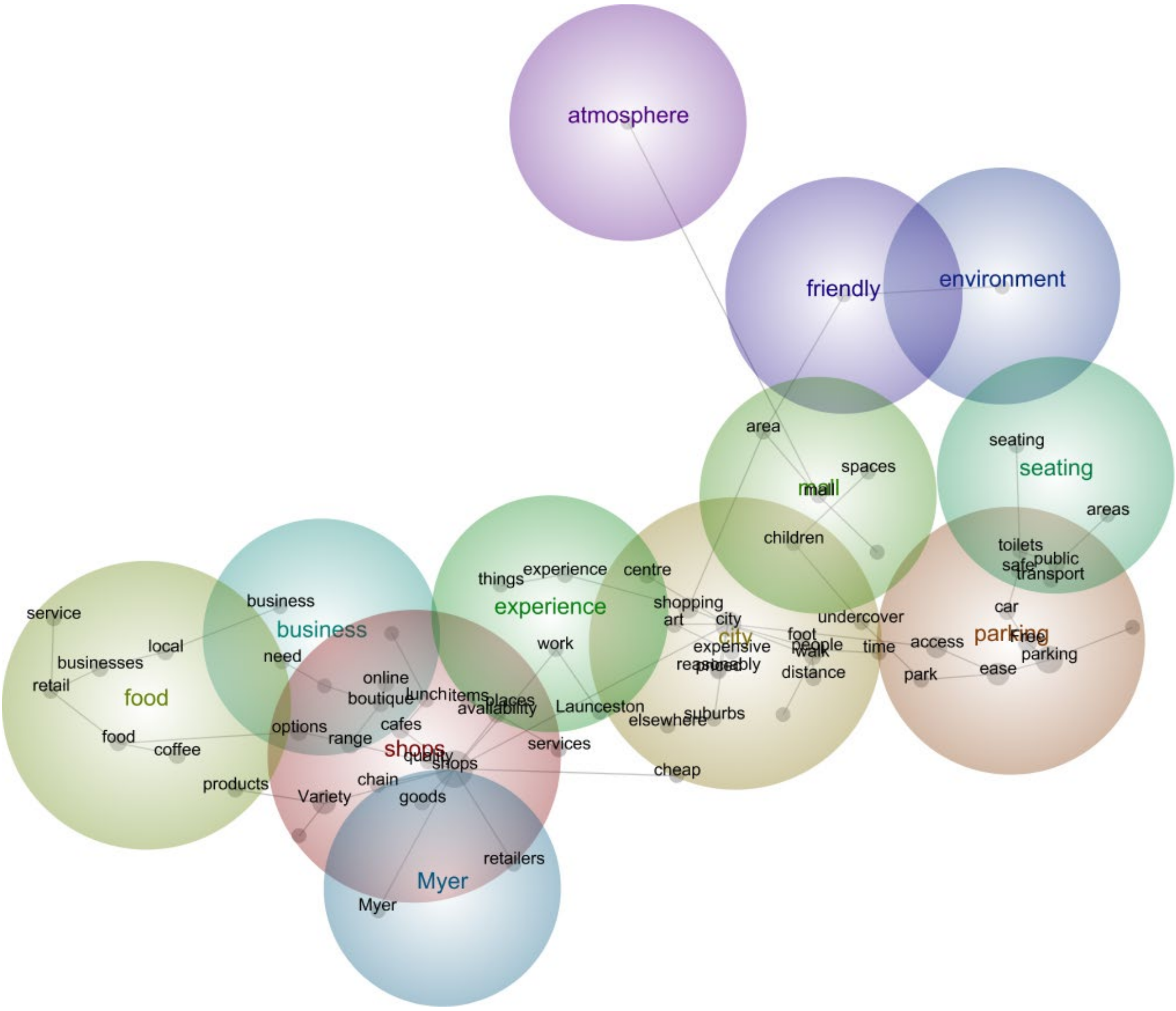

Figure 3. Consumer drivers for city shopping

The theme of *shops* is also the 'hottest' for this group of respondents, and includes a range of concepts such as variety, range, availability, quality, boutique and chains, as well as cafés and restaurants. The next important theme is *parking*, with concepts of free, hours (one or two free), and ease and access. The third theme of *city* involves broad concepts about the broader city offering, such as walkability, the overall shopping experience, (reasonable) pricing, and (the provision of public) art.

Table 5 presents the top three drivers for city shopping from both groups of respondents.

	Retailers	*Consumers*
Top 3 drivers for city shopping	Type and variety of shops	Type and variety of shops
	Friendly and customer-oriented service	Parking
	Availability of parking, retail, foods, goods and service	Overall city shopping experience

Table 5. Top 3 drivers for city shopping

In terms of the top drivers for city shopping, retailer and consumer groups reported similar factors in terms of the importance of the mix of different retail stores and both groups also identified the overall shopping experience which includes parking availability, food options and a mix of goods and services on offer in the city. Retailers also considered the provision of friendly, customer service; consumers also identified parking (free, plentiful, accessible) as being important.

5.3 Barriers to city shopping

Retailers and consumers were asked to nominate up to five factors they considered discourage people from shopping in the CBD. Figure 4 provides the concept map showing the response from retailers.

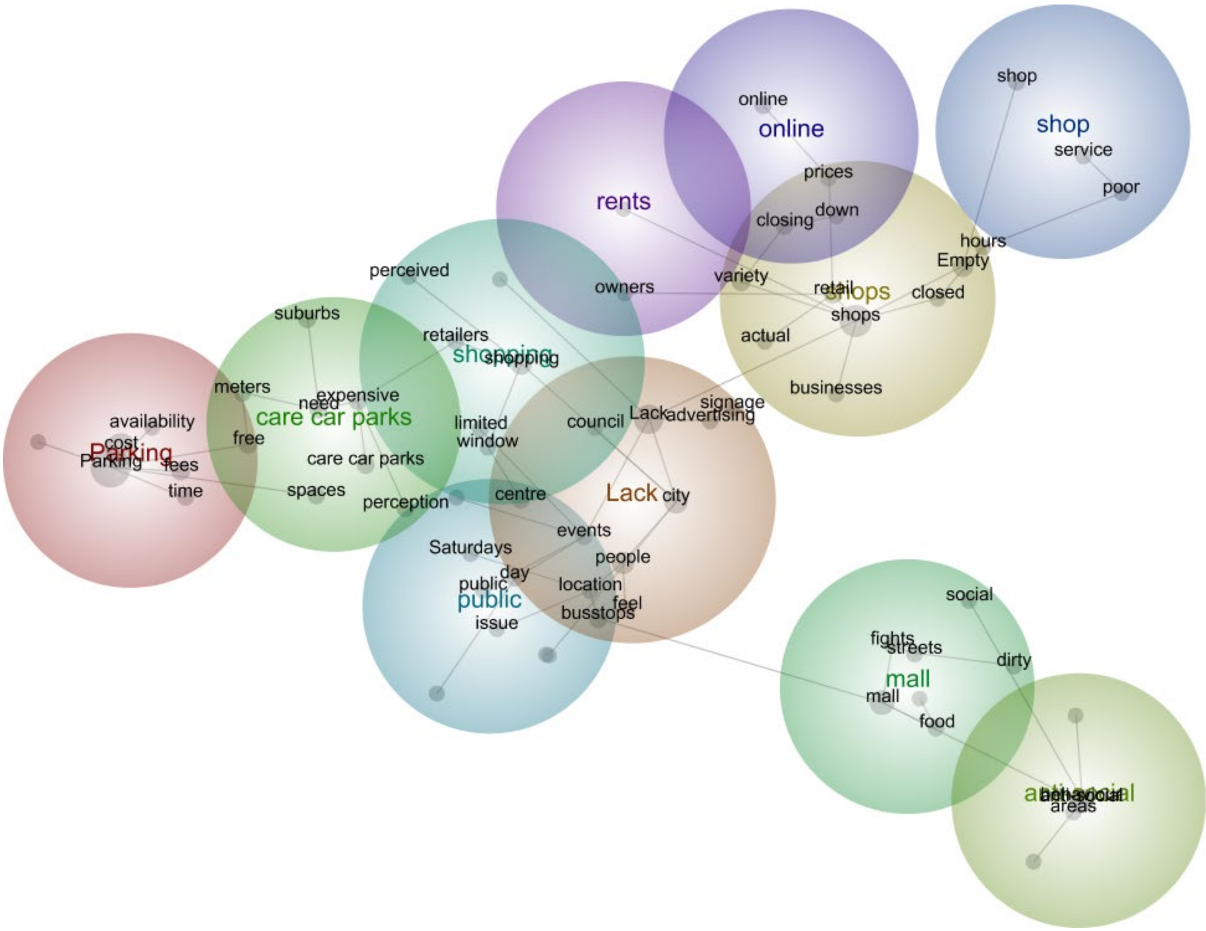

Figure 4. Retailer barriers to city shopping

The ‘hottest’ theme is *parking* in the city, and incorporates concepts such as cost/expense, availability, time (limits), and (requiring) coins. A theme concerning *lack* follows, which included concepts such as (lack of) stores, culture, variety, toilets, and parking. *Shops* was the next most important theme, though in contrast with the previous question, this was related to concepts such as closed, closing (down), empty, and vacancy.

Figure 5 provides the concept map showing the response from consumers.

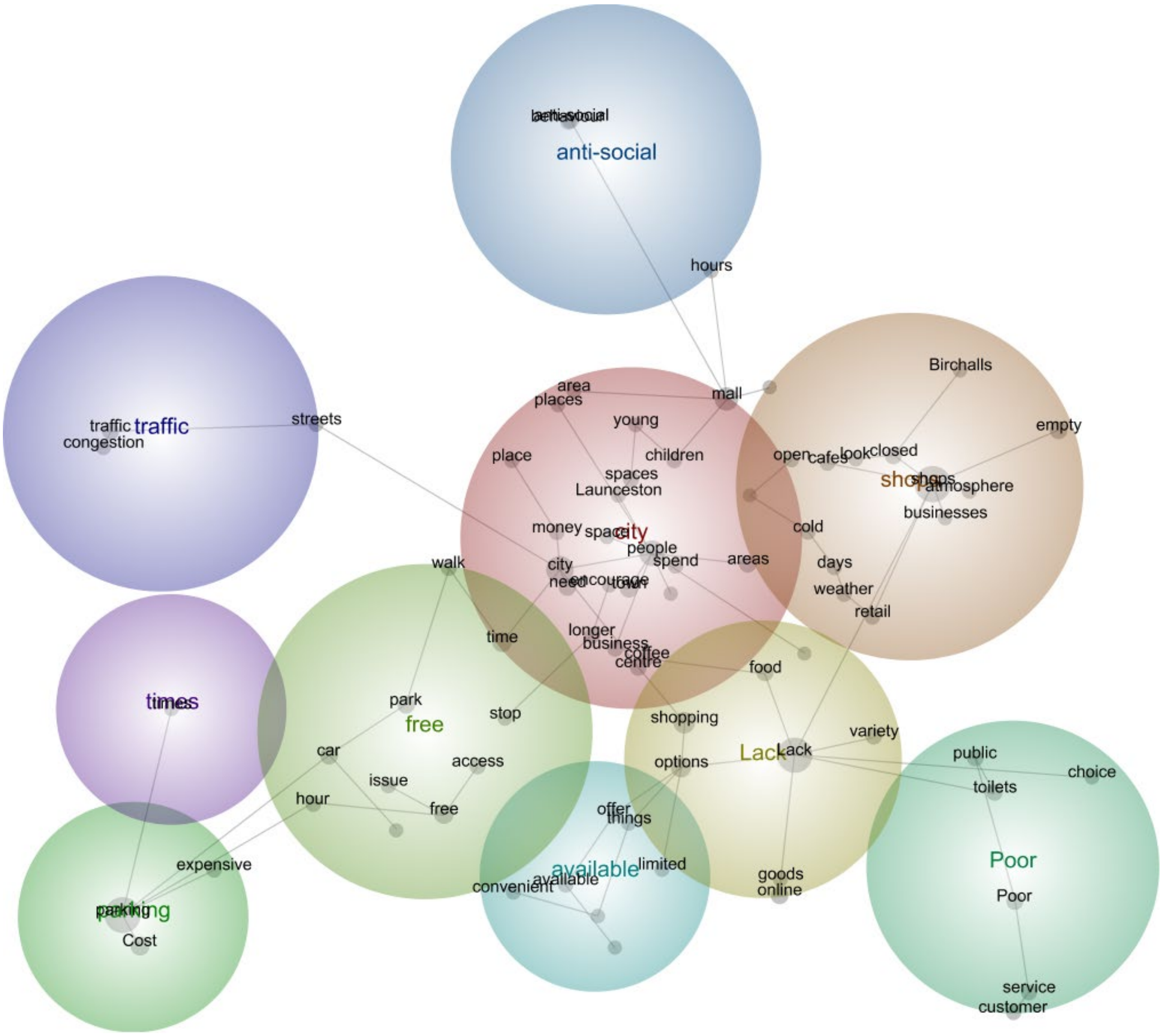

Figure 5. Consumer barriers to city shopping

The two ‘hottest’ themes are *city* and *shops*, as well as a linked theme of *lack*. Related concepts for these three themes include lack of variety, lack of food and options, (empty or vacant) spaces, the need for more family and play places and more parking spaces, the problem of closed shops, reduced opening hours, the lack of undercover shopping options (cold, weather). With regard to city theme, an overarching concept is that of the city no longer being relevant.

Table 6 presents the top three barriers to city shopping from both groups of respondents.

	Retailers	*Consumers*
Top 3 barriers to city shopping	Parking	City no Longer Relevant
	Lack of Variety of Shops and Amenities	Shops (Empty, Closed, Lack of Undercover Shopping)
	Empty Shops	Lack of Variety of Shops and Amenities

Table 6. Top 3 barriers to city shopping

There were similarities across the two groups of respondents with regard to the factors that discourage shopping in the city. Both respondent groups identified the lack of variety of stores and amenities, and the problem of empty shops (as well as limited opening hours and a lack of weather-proof shopping) as significant barriers. In addition, retailers listed parking as the most important barrier for access to city retailing; consumers highlighted the city as being 'no longer relevant' related to a range of different factors affecting the shopper experience.

5.4 Factors that encourage out-of-town shopping

Retailers and consumers were also asked about the factors they think encourage people to shop in out-of-town locations (e.g., at suburban shopping areas and centres).

Figure 6 provides the concept map showing the responses from retailers.

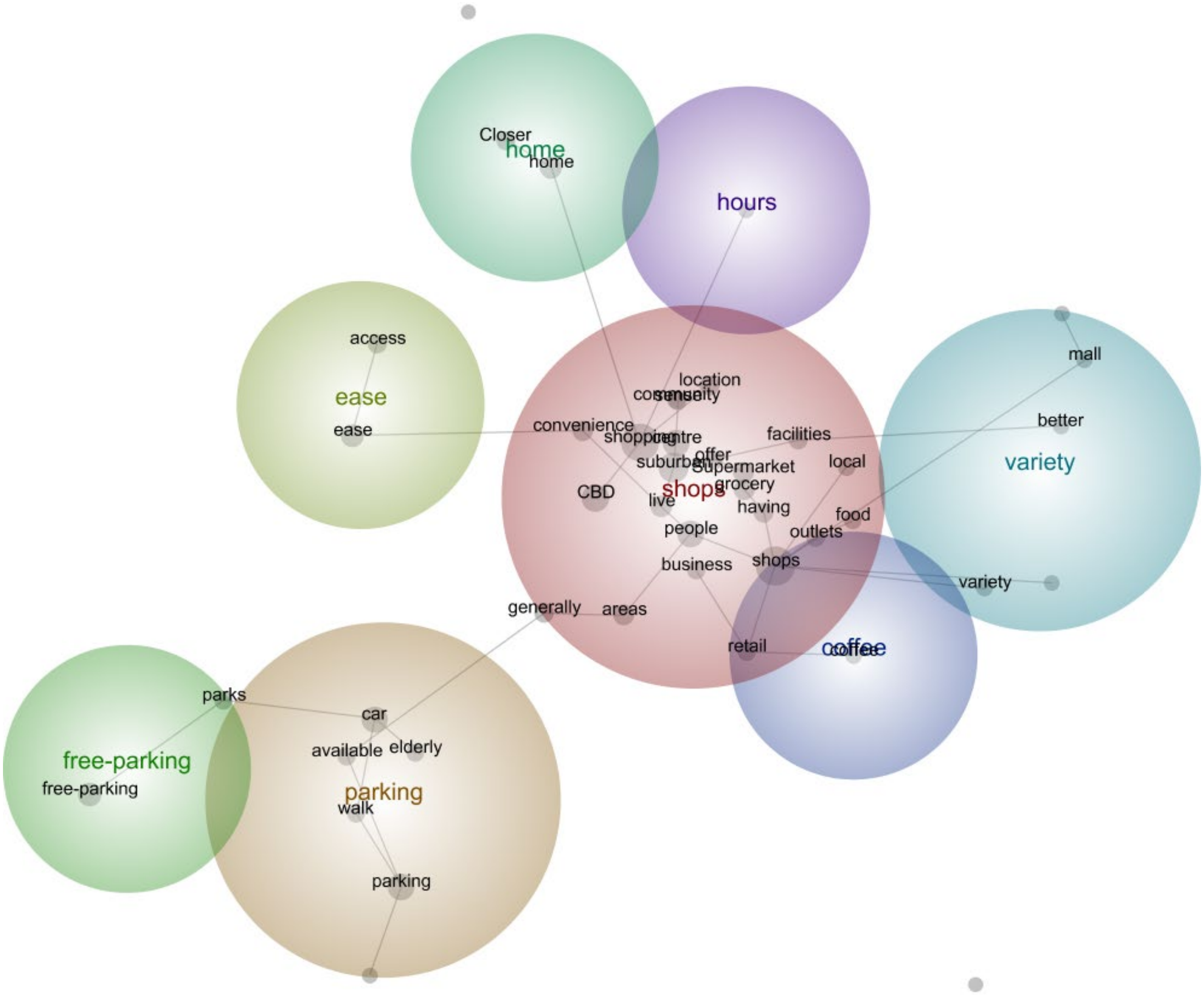

Figure 6. Retailer factors that encourage out-of-town shopping

The 'hottest' theme is *shops*, and this encompasses a general range of concepts including convenience (local and close to where people live), (co-location with) supermarkets/grocery stores, facilities including food (cafes and eateries), (shopping centres being under-cover and therefore) temperature-controlled, and sociability. *Parking* was the next most important theme (overlapping with the additional theme of *free-parking*), with concepts such as ease, convenience, (short) walking distance to shops (from the car park), (being) available, and (easier for the) elderly. The third most important theme of *ease* related to easy access and ease of the overall shopping experience.

Figure 7 provides the concept map showing responses from consumers.

Figure 7. Consumer factors that encourage out-of-town shopping

The ‘hottest’ theme is also *shops* encompassing a range of concepts including (co-location with) supermarkets/grocery stores, services, food, (fulfilling) shopping needs, (being) handy, and cafés. This is followed by the theme of *access* which includes concepts quick, easy, and (free) parking. The next most important theme is *parking* including free and easy and also related to another theme *free-parking.*

Table 7 presents the three most important factors that encourage out-of-town shopping for both retailers and consumers.

	Retailers	*Consumers*
Top 3 drivers for out-of-town shopping	Variety and mix of shops (especially the availability of a supermarket)	Variety and mix of shops (especially the availability of a supermarket)
	Parking (free and easy)	Accessibility
	Ease of shopping experience	Parking (free and easy)

Table 7. Top 3 drivers for out-of-town shopping

The top drivers for encouraging out-of-town shopping were similar across both the retailer and shopper groups and comprised the types of shops and services on offer (particularly the provision of a supermarket being located within a shopping area), (free, easy and plentiful) parking and the ease of the overall shopping experience at suburban shopping centres where parking is close by, centres are generally flat and easily accessible, and allow consumers to 'get in and out' relatively easily.

6.0 Discussion

Three common themes emerged in the responses from both retailers and consumers regarding both drivers and barriers for city shopping: the type and variety of retail stores (i.e., the retail mix), car parking, and empty shops.

6.1 Store variety

Both groups of respondents reported the mix of shops (type and variety of stores) was a key driver for city shopping, and at the same time, a lack of store variety was considered a barrier. This supports the findings of Litvin and Rosene (2017) about the importance of the composition and organisation of city centre retailing. Specifically, the merchant mix in city areas should align with resident and visitor demographics to maximise interest and spending. The finding also confirms the retail offer and retail representation as important factors (included in a list of the 25 most important) contributing to the vitality and viability of high streets across the UK identified by Parker et al. (2016). Related factors also identified by Parker et al. (2016) included the range and quality of goods and merchandise assortments (as a function of the retail mix) and the number of chain stores versus independent stores on offer in a particular shopping area. In this regard, respondents in the current study also cited unique, boutique and local stores as being important drivers for city shopping.

Unlike the UK and US, Australia has not adopted a BID (or similar) program, with each city shopping area instead falling under the auspices of the local council and supplemented by marketing organisations and chambers of commerce in assisting with marketing and promotion efforts. Given the existing challenges facing bricks and mortar retail (prior to COVID-19) and now the impact of the health and economic crisis on retail trade in Australia, it is timely for local governments to consider implementing similar programs in pilot towns and cities.

6.2 Car Parking

Both respondent groups cited car parking as both a driver and a barrier for shopping in the city centre; specifically cost, availability, time-limits and accessibility of parking spaces. This confirms the finding of Parker et al. (2016) that provision of car parking (as a ‘necessity’) is important for high street viability and vitality. Reimers (2013) found consumers regard convenient car parking as an important determinant of where they choose to shop, with many shoppers choosing out-of-town shopping malls attractive locations because they offer free, plentiful and accessible car parking and the responses reported in the current study concur with these earlier findings.

In Australia, there continues to be a strong reliance on vehicle travel, particular in those towns and cities that do not have a sizeable or sophisticated public transport system. Mid-sized cities and towns usually have population sizes that are not large enough to support effective rail or bus networks, and so consumers often have little choice but to use their cars for shopping trips to the CBD. Somewhat surprisingly, there is a dearth of academic research on the relationship between car parking and retailing (particularly in Australia) and it is therefore difficult to draw on previous studies to make recommendations about reducing the cost of parking and the impact this would have on the retail sector. Car access and parking influence consumer choice of shopping location and so local governments seeking to deter car usage in towns and city centres need to ensure the balance is not tipped in favour of out-of-town shopping.

6.3 Empty shops

The findings of this study support previous studies that vacant stores are detrimental for urban areas; the retailers and consumers surveyed in this study believe empty stores are undesirable and present a significant barrier for attracting shoppers and visitation to city centres.

A city-wide strategic approach to dealing with the visual aspect of empty shops suggested by the High Street Report (Ministry of Housing, Communities & Local Government, 2018), could include a register of landlords who own empty properties with local authorities working with landlords and tenants to respond innovatively to the problem created by such vacancies. In addition, the High Streets Taskforce (Ministry of Housing, Communities & Local Government, 2018) also propose an 'Open Doors' program to match landlords of empty stores with community groups, or traders with social purpose, seeking space. This approach could also be introduced by local governments in Australian cities and towns where empty shops are problematic. Regular audits of empty stores will be required to measure vacancy percentages, particularly in the wake of COVID-19, where more people will remain working from home and shopping closer to where they live (i.e., away from city centres) (Maginn and Mortimer, 2020; Mortimer, Grimmer et al., 2020).

6.4 Out-of-town shopping

With regard to the drivers encouraging out-of-town shopping, both retailers and consumers considered the variety and mix of shops on offer to be the top driver, particularly the provision of a grocery store or supermarket. Free parking with easy access, and the overall accessibility and ease of the shopping experience were also regarded as drivers for suburban shopping by both respondent groups.

Suburban shopping centres therefore predominantly provide for consumers engaged in *convenience* shopping. As there is a general trend around low population growth and subsequent population aging in Tasmania, these types of centres will continue to appeal to a particular shopper cohort – those seeking a convenient and easily accessible shopping experience (Hare, 2003; Meneely et al., 2009; Moschis et al., 2004; Teller et al., 2013).

It is much more challenging for city centres to provide shoppers with many of the factors identified as important for out-of-town shopping (e.g., provision of supermarkets, retail variety and mix, free parking, undercover shopping, and so forth). In this regard, it is important that any local authority strengthens a city's position as a *speciality* shopping experience: a destination offering something different from the convenience proposition offered by suburban shopping centres. The positioning of a city, therefore, should highlight the benefits of speciality stores (particularly small and independent stores), arcades, cafes and restaurants, entertainment, arts and culture, heritage, providing unique and pleasant places to meet and spend time, and the provision of an inimitable shopping experience that cannot be found in other shopping locations. Encouraging shoppers and tourists to support 'local' businesses operating in city centres (where there are often many more small and independent stores than in suburban centres or malls) is an effective marketing strategy for positioning city retailing.

7.0 Limitations and future research

There are four research limitations to be noted which offer potential avenues for future research. First, the data were collected pre-COVID-19 and so the impact of the coronavirus was not a factor in the research. The global pandemic has contributed further to the extremely challenging environment for bricks and mortar retailers in locations around the world and future research on retailing will therefore necessarily take into account the impact of COVID-19 on retailing and city shopping (Roggeveen and Sethuraman, 2020). Future research investigating 'where' people choose to shop, and why, will need to take into account the broad impact of the pandemic as well as micro factors, including the impact of lockdowns on temporary store closures, restrictions on physical shopping including social distancing measures, increased hygiene and cleaning protocols, limited numbers of customers and staff in stores. Second, the data were collected from retailers and shoppers from a single local council area in a single state, in regional Australia (i.e., areas outside Australia's major capital cities). Future research could be conducted in other cities or towns, particularly areas with higher rates of population growth and stronger economic indicators including major capital cities. Related to the first limitation of the study, this research could include a mix of towns and cities that experienced the pandemic very differently (e.g., Melbourne in the state of Victoria, which was under a long-term lockdown during August to November 2020). Third, the study used a self-report survey for retailers and the data were collected using a single informant from each business which may have limited the results. That said, many of the retailers surveyed were non-employing or micro businesses (staffed predominantly by the owner/manager). Future research could involve multiple informants, where appropriate, to provide a wider range of views. Fourth, the use of an online consumer survey limited participation from shopper respondents who were not digitally literate or who may not have been aware of the survey and did not involve any specific demographic questions. Future research could employ either a customer intercept survey or a paper survey delivered to rate payers' homes and could consider possible demographic differences in the perception of drivers and barriers to city shopping.

8.0 Conclusion

The broader retail industry is in an era of transformative retail change (Millington et al., 2015), in which online shopping, multichannel retailing, international retailers, the rise of a convenience culture and out-of-town developments have all contributed to a turbulent economy and trading environment for retail firms around the world (Grimmer, 2020). Importantly, this study contributes to the broader international literature on high street and city centre retailing by providing an Australian perspective on drivers and barriers for city shopping, and confirms the factors that are necessary for local governments, marketing organisations and business associations to attract and retain city visitors and shoppers. There is increasing recognition that in future, retailing will not be the *main* drawcard for city visitors (Litvin and Rosene, 2017; Morandi, 2011; Peel and Parker, 2018). Recognising this, the study also acknowledges and confirms that whilst still vitally important, retail will increasingly sit alongside services, attractions and 'experiences' as the major factors for attracting visitation to cities and town centres. For town centres to survive, and for individual retail (and other) businesses to continue to trade successfully, a careful mix of retail, hospitality, services and entertainment options should be on offer in town and city centre retail precincts.

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