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Evolution of the Food Retail Landscape in Developing Countries: Lebanon as Case Study

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UNIVERSITÉ DE MONTPELLIER

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L'évolution du paysage de la distribution alimentaire dans les pays en développement : le Liban comme étude de cas

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Introduction

Like many developing economy countries of the Global South, Lebanon appears to be experiencing a transformation of its food system, characterized by the rise of supermarkets. The relationship between supermarkets and traditional retailers in developing countries has been the subject of ongoing debate: Is supermarketization inevitable? Are all economies condemned to follow the same development trajectory of 'modern' retail?

Food retail landscapes[1] have evolved over recent decades in a process termed supermarketization, which is marked by an expansion of 'modern' food retailers to control an increasing share of consumers' food expenditures. Modern retailers compete with traditional retailers, gaining market share at the expense of the latter. Empirical evidence supports this conclusion in both developed and developing countries, with a progression from more to less developed countries (Reardon *et al.*, 2007). Across developing countries, supermarketization is described as having moved in accelerating waves (Reardon & Hopkins, 2006).[2]

Is the dominance of supermarkets a foregone conclusion, or can traditional retailers resist this tidal wave of modernization? While a food retail transformation is generally acknowledged, contrarians argue that the supermarketization phenomenon has been over-generalized in its reach: Competition among formats has been intense and supermarkets may never fully penetrate all market segments (Humphrey, 2007). In studies drawn from selected developing country contexts such as China, India, and Vietnam, authors show that traditional retail has resisted, leading to a coexistence of tradition and modernity within the market (Dholakia *et al.*, 2012; Hai Tran & Sirieix, 2020; Yuan *et al.*, 2021).

The Significance of Supermarketization

The inevitability – or not – of supermarketization matters in practical, real-world terms because the dominance of modern food retail is reported to have significant impacts on food systems and actors therein ranging from producers to consumers. This transformation may drive traditional retailers from the market, eliminating their businesses and employment patterns on a potentially wide scale given that retail trade is one of the most common types of small and household business in developing countries (USAID, 2019). Supermarketization reshapes food supply chains, typically favoring centralized procurement from large-scale producers, wholesalers, and importers to the exclusion of smaller and local suppliers such as smallholder farmers that are unable to meet the quality, volume, and supply requirements of modern retail chains (Thomas Reardon *et al.*, 2009; Weatherspoon & Reardon, 2002). These generally (though not universally) negative impacts may intensify as supermarketization proceeds: Rising levels of supermarket concentration may exacerbate power imbalances and foster un-competitive practices or abuse of market power by supermarkets (Lawrence & Dixon, 2015). Supermarketization also has consumer-side impacts.

[1] Rischke *et al.* (2015) use the term 'food environment,' defined as the "[food related] physical and infrastructural features of the area" including density of and access to retail outlets, including supermarkets (10).

[2] Reardon and Hopkins (2006) identify four waves of supermarketization across the developing world, spreading to the following countries: (1) South America, northern Central Europe, East Asia (outside Japan and China); (2) Mexico, Central America, South Africa, Southeast Asia, southern Central Europe; (3) India, China, Eastern Europe; and (4) eastern and southern Africa, south Asia (outside India).

Supermarkets alter the quality, variety, and price of the food on offer to consumers, which has implications for their nutritional health, purchasing power, and food security. Supermarkets may help to make higher quality food more available to customers (Minten, 2008; Woldu *et al.*, 2013), and their adoption of public or private standards may improve food safety (Wertheim-Heck & Spaargaren, 2015). However, supermarketization has also been associated with an increase in access to and consumption of energy-dense processed foods of limited nutritional value in developing countries (e.g., Asfaw, 2008; Hawkes, 2008; HLPE, 2017; Qaim, 2017; Reardon *et al.*, 2021; Umberger *et al.*, 2015). Competition with and displacement of smaller food retailers has caused some communities to become 'food deserts' without access to diverse dietary choices (Lee & Lim, 2009). As for price, early research predicted that the supermarketization process would reduce the high cost of food distribution and retailing and expand the range of goods available, to the benefit of consumers (Goldman, 1975-1976, 1981, 1982), though subsequent studies have found that supermarkets' ability to deliver lower prices may be delayed until they achieve economies of scale and pass savings on to their customers (Minten, 2008; Woldu *et al.*, 2013). At a more macro level, supermarketization implies the concentration of market power and thus raises questions of how policymakers can limit, control, or exploit this strength in the pursuit of goals within the food system. In sum, while these impacts are not yet fully understood, the process of supermarketization is an important area of study for its potential impacts, particularly adverse long-term risks such as the exclusion of smallholder farmers and producers from accessing larger markets, multi-dimensional reductions in food security, and an acceleration in the nutrition transition among consumers.

While this research is not immediately concerned with the impacts of supermarketization, a recognition of these possible impacts serves as a compelling motivation to understand the process of supermarketization and its potential barriers in developing country contexts.

Lebanon as a Case Study of Interest

Several decades of academic study on supermarketization in developing country contexts (Gorton *et al.*, 2011; Thomas Reardon *et al.*, 2009) have allowed scholars to conclude that, "Supermarketization in the developing world does not operate homogeneously and does not have the same effects in every country" (Tessier *et al.*, 2010: 1417). This diversity of experience argues for a wider scope of study including in the focus of country case studies. Nevertheless, limited evidence about the supermarketization process or its effects has been reported in the Middle East and North Africa (MENA) region (Amine & Lazzaoui, 2011; Codron *et al.*, 2004; Hino, 2010). This gap in the literature extends to the country of Lebanon (Seyfert *et al.*, 2014).[3]

For this research, the case of Lebanon is selected as one of interest in which to explore the extent, process, and drivers of supermarketization. Lebanon is a small country within the MENA region. International supermarkets first entered the country after World War II, retreated during the Lebanese Civil War (1975-

[3] Literature searches undertaken at the start of this research effort confirmed a gap in the literature. A search of the Web of Science database conducted on October 24, 2017 for the period 1900-2017 for the terms "supermarket" and "Lebanon" returned five (5) results; and for the terms "supermarket" and "Middle East" returned only five (5) results. A search of the Scopus database for the terms "supermarket" and "Lebanon" within the title, abstract, or keywords returned only four (4) results; and for the terms "supermarket" and "Middle East" returned only five (5) results.

1990), and subsequently re-entered the market. Local supermarkets emerged in the mid-20th century.[4] By the early 1990s, Lebanon was experiencing a supermarket 'take-off' driven by local investors rather than foreign direct investment (FDI). Modern retailers grew in market share at the expense of traditional retailers, accounting for approximately a third of food retail sales and placing Lebanon at an early stage of the supermarketization process (Codron *et al.*, 2004). Subsequent data confirm that modern retailers do not yet dominate the market (Euromonitor International, 2022). Limited study of the Lebanese case has preliminarily identified but not explored the possible reasons for this slower-than-anticipated growth by modern food retail. Codron *et al.* (2004) explained the low level of supermarket penetration in Lebanon and other eastern and southern Mediterranean countries as a result of low FDI, in turn the result of unspecified cultural traditions and political and administrative constraints. While research exploring the role and preferences of consumers in the supermarketization process has been conducted in other MENA countries (e.g., Amine & Hendaoui Ben Tanfous, 2012; Amine & Lazzaoui, 2011; Sadiq Sohail, 2008; Sehib *et al.*, 2013), no studies have been identified that focus on consumers as a factor driving or impeding supermarketization in the Lebanese context. This history raises questions as to whether food retail in Lebanon will modernize as the supermarketization literature might predict, while the available literature prompts us to ask whether identifiable factors in fact play a role in supporting the continued presence of traditional food retail. Historical media reports on the entry and exit of supermarkets[5] reinforce the hypothesis that the supermarketization process in Lebanon may not be an inevitable march forward, and there may be something particular in this case for more detailed exploration.

An examination of food retail transformation in Lebanon is complicated – and made more salient – by recent events. Since 2019, Lebanon's food landscape has again experienced shocks, this time in the form of overlapping political, economic, and public health crises: A political revolution began in October 2019, quickly followed by the COVID-19 pandemic and associated market disruptions. These were overlaid with an economic crisis marked by hyperinflation and among the strongest contractions observed globally in 150 years (World Bank, 2022a). These crises may not only destabilize and reshape the market, but could also alter the preexisting trajectory of food retail transformation in the country. As noted above, the evolution of food retail has implications across developing countries' food system, but the salience of this issue is especially heightened in a context of crisis that has upset market conditions, threatened livelihoods, and undermined food security.

In sum, Lebanon is a particularly interesting case to explore the issue of supermarketization for multiple reasons. The relatively slow pace of supermarketization in comparison to other developing country experiences suggests that its path may be unique and of interest as a potential outlier. Moreover, the confluence of crises that have profoundly shocked Lebanon since 2019 promises to have significant impacts on the food retail landscape, offering a unique case to explore insights into the dialogue between food retailers and consumers and potential implications for the continued evolution of the food retail environment.

[4] Please refer to Article No. 3 for details on the early entry of modern format retail into the Lebanese market.

[5] Modern format food retail chains that have closed in recent decades include Ecomax, TSC, and Bou Khalil ("Ecomax closing shop in Lebanon," 1999 February 3; Habib, 2017 October 19).

Research Objectives and Approaches

The overarching objectives of the current research are to explore the food retail landscape in Lebanon; to understand whether it represents an example of the resistance of traditional retail to the domination of modern retail in a developing country context; and to demonstrate that food retail transformation is a function of factors already identified in the literature (notably product assortment and price) but also of socio-cultural considerations specific to the context in which it takes place. To better understand the barriers to supermarket expansion in developing country contexts like Lebanon, this research further seeks to examine the meanings of retail formats and their offerings, the cultural resources they provide, and the way consumers are willing or able to animate them or not.

This research tackles these objectives through four component articles. The initial article presents major theoretical contributions of the literature to understand the supermarketization process, its drivers, and its patterns in developing countries like Lebanon. It examines disparate but relevant threads of the academic literature: These span the evolution of retail formats, notably the Big Middle and its focus on product assortment and price, and food retail transformation in developing country contexts, reading these critically (through the lens of Consumer Culture Theory) and with application to the Lebanese case. The second article assesses the extent of supermarketization within Lebanon's pre-crisis food retail landscape, through a study of food shopping behaviors among leading-edge consumers and their attitudes vis-à-vis modern and traditional retail formats. Quantitative analysis is used to identify patronage patterns and stated preferences that inform their selection among modern and traditional retail formats, and reveal evidence of supermarketization but – consistent with evidence found elsewhere – gaps in supermarket penetration. The third article explores Lebanon's food retail landscape through a focus on the offer of modern food retailers. This qualitative, observation-based study carefully examines the offer of modern format retailers to consumers in Beirut and its environs, considering factors such as those raised in the quantitative analysis and with a particular focus on the store environment. In doing so, this article examines to what extent modern retailers are adapting their offer to the socio-cultural context in which they operate and thereby hybridizing modern food retail in the Lebanese context. Fourth, this research revisits Lebanese consumers' food shopping behaviors and attitudes towards modern and traditional food retail formats, specifically within the crisis context. A qualitative investigation draws on semi-structured interviews with Lebanese consumers to understand how consumers may make sense of retailers' offer beyond product assortment and price, and how perceptions and patronage decisions may shift (or not) in a context of crisis. Through its four-part approach, this research will show that, despite a strong presence of modern format food retail in Lebanon, traditional retail has resisted in line with socio-cultural considerations that extend beyond retailers' product assortment-price offer.

Article No. 1. Can Existing Theories Explain Food Retail Transformation in Developing Countries? An Investigation in the Lebanese Context

This article analyzes the supermarketization process within Lebanon's food retail environment and proposes a new approach to understand the path of retail evolution in developing countries. The article does this by reviewing key theories relevant to retail evolution and supermarketization; considering their main features and commonalities; and assessing whether they are coherent and relevant to the process of supermarketization in developing countries, specifically Lebanon.

Methodologically, this article is structured as a critical literature review. It builds on a narrative review of the literature, which is appropriate given the objective of theoretical construction within a critical lens (Hammersley, 2001). To understand the process of supermarketization, the article reviews a purposive selection of studies chosen for relevance to the objective. This research takes a comprehensive but non-systematic approach to the literature review, which is well suited to a review of the most relevant literature and to contribute to theory development (Dixon-Woods *et al.*, 2006).

The article proceeds to identify major strands of the literature concerning mainstream theories of retail evolution – classical and more recent – and consider their central contributions. These include the Wheel of Retailing, the Big Middle, and their extension through the application of Consumer Culture Theory (CCT). According to the Wheel of Retailing, innovative retail initially orients toward low costs, low prices, low margins, and low status. They later 'trade up' the goods and services offered (McNair, 1931, 1958), raising investment and operating costs and creating space for newer retailing forms to enter by offering lower costs and prices (Hollander, 1960). Criticism of the Wheel of Retailing has, *inter alia*, observed that innovative retailers may enter the market by targeting higher-income consumers then 'trickle-down' to conquer a broader market (Brown, 1991). The Big Middle framework unites these trading-up and trickle-down processes, conceptualizing the evolution of retail offerings and cost evolution as a competition for the marketplace in which the largest number of potential customers are to be found. Retailers enter the market as low-price retailers or as quality-focused innovators before migrating to the Big Middle by expanding their product lines or by widening their market, respectively. Trading-up and trickle-down movements thus reflect the mainstream commoditization of either cost-driven or elite retail offerings. Intense competition within the Big Middle is the dynamic force spurring retailers to maintain their value proposition and, ultimately, driving the evolution of retail formats (Levy *et al.*, 2005). Environmental factors such as socioeconomic and technological changes to the retail environment also inform success in the Big Middle (Brown *et al.*, 2005). A socio-cultural reading of the Big Middle through the lens of Consumer Culture Theory (CCT) emphasizes that retailers' offer extends beyond product assortment and price, it includes cultural resources (Arnould, 2005) from which consumers may derive meaning (McCracken, 1986). According to this perspective, evolution within the retail space is a result of changes in the combination of cultural resources that firms produce and that consumers prefer (Arnould, 2005), rather than competition between firms.

Then, the article turns to the literature addressing the process of supermarketization through studies undertaken in the context of emerging and developing countries, which is strongly associated with two key disciplines – marketing/retailing and economic development – and the work of two principal researchers within the main strands of the academic debate, Arieh Goldman and Thomas Reardon (Gorton *et al.*, 2011). Through a meta-narrative review (Greenhalgh *et al.*, 2018), the article seeks to retrace the evolution of these two lines of research, review them, and identify commonalities and distinctions. These scholars approach the evolution of food retail with distinct areas of focus: Goldman (1974a, 1974b, 1975-1976) was interested in the endogenous hybridization process through which traditional food retailers transform towards modern retail formats, as well as the barriers that lead consumers to selectively adopt modern retail formats (Goldman, 1982, 2000; & Hino, 2005; et al., 2002). Reardon's work has examined the factors driving the rapid diffusion of supermarkets in waves across developing countries since the 1990s, notably foreign direct investment, (Reardon *et al.*, 2007), which coincided with consolidation and

multi-nationalization of the food retail sector (Thomas Reardon *et al.*, 2009). Points of commonality in their work include a shared conception of the process of supermarkets' expansion in developing countries with respect to geography and socio-demographics of consumers, consistent with a trickle-down movement by innovative retailers to conquer the Big Middle. Major differences between Goldman's and Reardon's perspectives concern the interrelationships between supermarket diffusion and its environment: Reardon analysis has been restricted to supply-chain relationships, while Goldman (2000; and Hino, 2005; et al., 2002) additionally considered the role of consumer culture and sub-cultures to understand barriers to supermarket diffusion once geographical and socio-economic gaps are filled. In addition, the theoretical basis provided by a socio-cultural reading of the Big Middle is be shown to be consistent – if not explicitly referenced – within the works of Goldman and Reardon.

Following the critical review of the literature, this article then tests the two leading theories of the supermarketization process in developing country contexts. To do so, the article applies secondary data to confront these in the Lebanese context. This article will show that the leading current theories fail to explain retail landscape transformation in such a developing country. Results will highlight the need to complement actual theories by proposing a new path of analysis that better accounts for socio-cultural, economic, and institutional specificities, to explain the process of supermarketization in developing countries. Accordingly, the socio-cultural approach embodied in Consumer Culture Theory will be shown to offer a better and more compelling understanding of the retail transformation process.

This article provides a critical literature review, but no empirical study. However, the synthesis of major research strands will provide academics/students and retailers with a means to conceptualize the evolution and status of the food retail sector in developing country contexts. Retailers may benefit from a clearer understanding of the opportunities and challenges to gain market share in Lebanon and similar markets.

The originality of this article is its combinatory synthesis of the literature on retail evolution and supermarketization, identifying commonalities and synthesizing their respective strengths to explore their relevance to a developing country context. These theoretical bases are, in combination, useful to explain (and predict) how supermarkets have entered and expanded within the developing market context. This theoretical grounding is thus appropriate to explore the offer of food retailers in Lebanon and its reception, understanding, and meaning to consumers in Lebanon.

Article No. 2. Food Retailing and Supermarketization in Lebanon: Shopping Behaviors among Leading-Edge Consumers

The second article in the thesis explores the food retail landscape in Lebanon, with a focus on consumers' patronage of and attitudes toward modern versus traditional format food retailers. In doing so, this article helps us to understand to what extent the Lebanese case represents an example of the resistance of traditional retail to the domination of modern retail; as well as to explore those factors relevant to its food retail transformation.

This article builds on the studies of supermarketization in developing country contexts undertaken by leading scholars Goldman and Reardon. Both view supermarket diffusion and adoption as a combined function of supply and demand of services (Goldman, 1981; Reardon *et al.*, 2003), consistent with an

objective to dominate the (food retail) market (Gorton *et al.*, 2011). Within the literature, various models and a range of factors have been proposed to explain supermarketization spanning supply-side and demand-side factors. Customer-centric models seek to understand the customer's desired attributes in a retailer, the relative importance or weighting of each attribute, and the extent to which different retail formats satisfy these attributes for their customers (Gorton *et al.*, 2011). Commonly applied attributes of interest include price and quality of products, the range or array of products offered, store location or proximity to customers, store image or reputation, and others including customers' demographic characteristics (Pan & Zinkhan, 2006). The socio-cultural dimension of retailing tends to be excluded from many retailing models (Fuentes & Hagberg, 2013: 291).

Through their combined work, these authors also identified the phased entry and domination of supermarkets across geography (larger to smaller cities) and socio-economic market segments (high- to low-income consumer segments) (Goldman, 2000; Goldman & Hino, 2005; Goldman *et al.*, 2002; Reardon & Swinnen, 2004), suggesting that more urban, higher-income consumers are the consumer segment to initiate and drive the supermarketization process in developing countries. A third aspect of supermarkets' phased entry is by product category (packaged groceries to fresh products), consistent with the selective adoption of supermarkets by consumers who may continue to shop for fresh or perishable products at traditional retailers (Goldman, 1982, 2000; Goldman & Hino, 2005; Goldman *et al.*, 2002).

With this grounding, this article applies a customer-centric model, a quantitative approach, and original, primary survey data to assess the extent and drivers of supermarketization in Lebanon. This research focuses on the food shopping behaviors and attitudes of leading-edge consumers – the urban, higher-income consumer segment that should have been expected to drive supermarketization forward. This research builds on an original survey of more than 200 Lebanese consumers, which was conducted before the onset of crises currently affecting Lebanon. It subjects the survey responses to descriptive and quantitative analysis, to determine the extent to which these urban, higher-income consumers have adopted supermarkets and the factors driving or delaying this transition.

Results will show that the consumers surveyed have adopted supermarkets selectively, exhibiting cross-shopping behaviors: They typically bought non-perishable foods from supermarkets and grocery stores and perishable goods (fresh fruits and vegetables, meat, fish, and baked goods) from traditional retailers. Demographic characteristics and retailer-related attributes are correlated with where consumers shopped, and which foods they purchased from different retailer types. Retailer location and travel time are significantly associated with consumers' choice of retailer. Lebanese consumers prioritized food quality, range of products, store location, and reputation when choosing where to purchase food. Consumers assessed supermarkets favorably as compared to traditional retailers with regard to range of products, store reputation, availability of specialty products, and prices. This research provides evidence that even the leading edge of Lebanese consumers have yet to abandon traditional food retail formats, and that the Lebanese market remains far from a complete food retail transformation.

In terms of contribution, this research responds to the call for further exploration of the process and drivers of supermarketization in developing countries, and specifically on the role of consumers as agents who inform and shape the food retail landscape (Fuentes & Hagberg, 2013; Paul *et al.*, 2016). With its detailed exploration of food shopping behaviors and attitudes in an under-studied context, Lebanon, this

research offers additional empirical evidence to the wider assessment of supermarketization in developing countries. Moreover, this study has particular value given its unique context: This research provides a historical view into the food shopping behaviors of Lebanese consumers, which is valuable in light of recent shocks (political, economic, and public health) affecting Lebanon that are expected to have a significant effect on the country's food system. By offering a pre-crisis baseline, this research can help future researchers to understand how such crises may have affected food retail in the country.

Article No. 3. Hybridization of Lebanon's Food Retail Landscape? Observations of Modern Food Retailers' Offer to Consumers

The third article within this thesis seeks to explore Lebanon's food retail landscape and the role of socio-cultural considerations in driving or impeding food retail transformation. It does so by examining retailers' offer to the Lebanese consumer, focusing on modern format retailers' store environment inclusive of the product assortment and cultural resources provided therein. This article searches for evidence that modern format retailers have hybridized in an effort to adapt their offer to the demand of local consumers, reflective of a possible evolution in Lebanon's food retail landscape.

This article is rooted in the literature on retail transformation, specifically the Big Middle framework (Levy *et al.*, 2005) and its socio-cultural reading through the lens of Consumer Culture Theory that envisions retailer's offer as a combination of product assortment, price, and cultural resources (Arnould, 2005; Arnould & Thompson, 2005; Badot & Paché, 2005). The retail store environment where people shop and with which people interact, and the symbols they carry, are also part of the offer (Arnould, 2005). According to this perspective, evolution within the retail space is not the result of firm competition but rather is a result of changes in the combination of cultural resources that firms produce and that consumers prefer (Arnould, 2005).

Turning specifically to food retail transformation, this article builds on the supermarketization literature and the contributions of Goldman and Reardon, among others. In developing countries, the supermarketization process has been associated with the entry of foreign-owned modern-format retailers via foreign direct investment (Reardon *et al.*, 2003). Foreign retailers typically enter developing countries by transferring their successful domestic offer (Grosso *et al.*, 2018), though the extent to which this business model is adapted to a developing country context may vary (das Nair, 2018). Goldman (1974a, 1974b, 1975-1976) predicted that retailers in developing countries would adapt their formats to local conditions in such a way as to hybridize their offer: Foreign retailers entering a developing country would hybridize in line with the local context, while local retailers would amend their offer to compete with new entrants. Researchers disagree on whether a customer-centric approach is an effective strategy for (foreign or local) modern retailers to pursue in developing country contexts (Ger, 1999; Gupta & Ramachandran, 2021), where they still face intense competition from traditional retailers that may better adapt their retail offer to the local context (Grosso *et al.*, 2018).

If the transfer of modern format retail – the supermarket model – from developed to developing countries is a form of globalization, then its adaptation or hybridization within a developing country context can be viewed as a form of glocalization. The term glocalization refers to the adaptation and objectification of structures of common difference in local contexts (Kjeldgaard & Askegaard, 2006, citing Robertson, 1992). From a macro-level perspective, glocalization occurs as the global market materializes in local contexts

(Kjeldgaard & Askegaard, 2006), and as a hybridization process yields many local adaptations and translations of international or global models (Wilk, 1998).[6]

In order to assess a retailer's offer, and the extent to which a retail model has been adapted or hybridized, characteristics of that offer must be considered. In his review of retail marketing, Mulhern (1997) classifies such characteristics according to a retailer's strategic or tactical decisions. Strategic decisions pertain to store location; store positioning including overall price and quality, product assortment, and store brands; store image; physical environment; and retail service. Tactical decisions pertain rather to pricing, promotion, advertising, in-store displays, and shelf space. Characteristics related to the retailer's offer may be visible to the consumer, whereas characteristics related to retailer know-how tend to be tacit or hidden from customer view (Goldman, 2001).

Armed with this conceptual grounding, this article applies qualitative methods as a valid approach to assess food retail environments as a reflection of their offer to consumers. This article relies on structured observations of five modern format food retailers operating in and around Beirut, Lebanon, with a purposive selection to ensure variation in the origin of ownership (local and international) and specific format (hypermarket, supermarket, discount store). Observations were undertaken in early 2020, before the full eruption of COVID-19 or Lebanon's economic collapse. The structured observations focus on the material artifacts and rich details of the consumption context (Peñaloza & Cayla, 2006). In retailing, the point of sale is the interface through which consumers interact with the marketing intentions of retailers, moderated by the actions of the staff they contact. The observation of this artifact – in this case, those aspects of the offer that are visible to consumers – is therefore particularly suited to understand how supermarketization advances via hybridization and conveys the flows of glocalization in Lebanon.

The results of the article will show that modern food retailers operating in Lebanon adapt their offer to local market demands in selected ways, consistent with the literature around glocalization and the hybridization of food retail in developing country contexts. This research will also provide evidence that modern format food retailers with international operations may be importing formats and practices, thereby shaping the offer (and expectations) of local consumers. Finally, variation in store atmosphere will be interpreted as evidence that modern format retailers consider socio-cultural factors in their offer to customers, competing on aspects beyond product assortment and price.

This article provides several contributions. This article moves beyond the existing quantitative evidence to explore what various food retailers offer to the Lebanese consumer and document a detailed, micro-level view of the food retail landscape in Lebanon. Building on the socio-cultural reading of the Big Middle framework, it investigates the offer of modern format retail to consumers with particular attention to product assortment and socio-cultural resources (price levels are beyond the scope of this research). This article offers a glimpse of how hybridization of the supermarket model takes form within a developing country context. In doing so, this article responds to identified gaps in the literature, notably a need for greater knowledge of market-based food retailing within developing countries and their contribution to the wider food environment (Turner *et al.*, 2018). Documenting food retail environments as they exist is

[6] This study adopts the macro-level perspective of glocalization as presented in the work of Askegaard and others, rather than the more micro-level perspective of researchers who focus their attention on the glocalization strategies of individual firms.

important to understand longer-term evolution in food retail environments. Separately, and if read in combination with evidence of what Lebanese consumers (claim to) seek from food retail and the resources they wish to actualize in their food shopping process, this research may serve to address the question of whether modern food retail responds to the demands of customers or not; and, therefore, whether any misalignment could provide an explanation for the slow pace of supermarketization in Lebanon.

Article No. 4. Food Shopping in Crisis: The Combined Effects of Revolution, Economic Collapse, and COVID-19 on Food Shopping Behaviors and Attitudes in Lebanon

With this fourth article, this research seeks to examine how consumers animate the offerings and cultural resources provided by retailers in Lebanon, and thereby demonstrate that food retail transformation is a function of factors already identified in the literature (notably product assortment and price) but also of socio-cultural considerations specific to the context in which it takes place. In this way, the article also serves to help understand whether socio-cultural considerations are an explanatory factor for the resistance of traditional retail to the domination of modern retail in this developing country context. It offers further value in exploring these issues within a crisis-affected context.

This article uses as its conceptual foundation a socio-cultural reading of the Big Middle framework, which seeks to explain retail transformation. The Big Middle framework conceives of the evolution of retail formats – such as modern food retail – as a function of retailers' competitive attempts to capture the largest number of potential customers through a combination of product assortment and attractive pricing (Levy *et al.*, 2005). Changes to the retail environment, whether geographic, technological, or socioeconomic, may also inform success in the Big Middle (Brown *et al.*, 2005). A socio-cultural reading of the Big Middle, rooted in a cultural understanding of markets, argues that retail success also depends on their ability to deliver socio-cultural value and meaning making to consumers (Arnould, 2005; Arnould & Thompson, 2005), thus setting as a valid research objective to understand how consumers perceive and make meaning of the offer provided by (modern food) retailers. Nevertheless, the role of the consumer within retail transformation has been generally overlooked in the literature (Fuentes & Hagberg, 2013; McArthur *et al.*, 2016).

Next, this article looks to the academic literature for insights into the theoretical and empirical impacts of diverse crises on retailing, beginning with economic crises. Research exploring the impact of economic crisis on retail evolution is limited, and offers conflicting conclusions as to the role of crisis in shifting the trajectory of this evolution. Crisis may prompt firms and entrepreneurs to innovate, develop new products and services, and change or pivot their business models in a bid to exploit new opportunities (Manolova et al., 2020; Portuguez Castro & Gómez Zermeño, 2021) and gain both customers and market share (Favaro *et al.*, 2009). Economic crisis thus helps to explain the historical emergence of lower-price retail formats (Brown, 1987). For Evans (2011), however, economic crisis does not change the competitive process for firms and therefore does not fundamentally shift the course or pace of retail transformation.

The literature on food retail transformation in developing country contexts offers few insights into the impacts of economic crisis on this process. Research on supermarketization, particularly the strand rooted in the work of Reardon, is situated within a narrative of unrelenting globalization and modernization. Reardon *et al.* (2003) note the role of economic growth and rising incomes particularly among middle-

class consumers as a driving force behind supermarketization. The impact of crisis or shock on the supermarketization process and the relationship between modern food retailers and consumers is not well studied. Empirical studies have associated economic crisis with price consciousness among consumers and the success of discount stores and hypermarkets in Asia and Latin America (Ang *et al.*, 2000; Zurawicki & Braidot, 2005), but not explored differential impacts on modern versus traditional retail segments. More recently, Maumbe and Chikoko (2020) concluded that two decades of macroeconomic hardship in Zimbabwe have impeded but not halted the entry and growth of supermarkets in that country.

The most recent research on which this article builds are the emerging studies of the COVID-19 pandemic on consumers' food behaviors and retail patronage patterns. Studies from diverse country contexts report that food shopping behavior has been subject to significant changes since COVID-19 with regard to the volume, composition, and frequency of food purchases (e.g., Iranmanesh *et al.*, 2022; Loxton *et al.*, 2020), as well as patronage according to store location and retail format (e.g., Ben Hassen *et al.*, 2022; Chenarides *et al.*, 2021; Cranfield, 2020; Thompson *et al.*, 2022). Emerging research suggests that COVID-19 may have provoked persistent, longer-term changes in consumer attitudes and behaviors around food shopping, with significant implications for food environments and food retailers (Cummins *et al.*, 2021; Thompson *et al.*, 2022). Gaps in this emerging literature include the need for qualitative explorations of the phenomenology of experiencing and reacting to crises such as COVID-19 (Ntontis *et al.*, 2022; Thompson *et al.*, 2022).

This study seeks to address various gaps in the literature from which it builds. To do so, this article explores the role that supermarkets play for Lebanese consumers before and during a period of overlapping crises (political revolution, COVID-19, and economic collapse) and seeks to deduce their potential implications for the longer-term process of supermarketization in the country. This study applies qualitative methods and data collected through the conduct of 20 semi-structured individual interviews with adults residing in Lebanon who hold responsibility for food shopping for themselves and/or their households. Data were collected in June 2020, several months after the outbreak of political revolution and the onset of COVID-19, and at a time when economic contraction was gaining momentum. Qualitative methods were applied as appropriate to understand consumer attitudes and motivations, as well as the phenomenology of living through crisis.

The results will confirm that Lebanese consumers exhibit cross-shopping patterns, relying on a combination of modern and traditional retail formats to satisfy their food needs, and suggest that Lebanese consumers make sense of the food shopping experience as one of more than a simple exchange of goods for money, in line with the socio-cultural reading of the Big Middle framework. An array of factors will be found to influence their choice of food shopping destination, ranging from those identified in mainstream retail theories (price, product assortment) to the individual-level activation of meaning and identity creation described within CCT. Shifts in retail patronage patterns will be linked to specific crisis impacts, including road closures, rising health concerns, and rapid inflation in food prices. These shifts, including a greater reliance on delivery services, will not be found to uniformly favor modern or traditional retailers, suggesting ambiguous impacts on the future trajectory of supermarketization and retail transformation in Lebanon.

This article seeks to offer several contributions. Its principal contribution is to explore the socio-cultural meanings that Lebanese consumers derive from their interactions with food retailers, the importance of this meaning making in consumers' retail patronage, and the impacts of crisis on both. Academically, this article contributes to a limited literature that explores the impact of crisis on food retail environments and food retail transformation. While the supermarketization phenomenon is generally studied in a context of economic growth, this study situates its examination in the unique context of Lebanon's overlapping political, public health, and economic crises. Methodologically, this article addresses perceived gaps in the literature by applying qualitative methods to explore the phenomenology of crisis in Lebanon, and specifically how crisis has affected the interaction of retailers and consumers and consumers' activation of the comparative resources that modern and traditional retailers offer. Managerially, the article seeks to offer insights into changes in consumers' food shopping preferences and patterns, which may help retailers adjust their offer within an uncertain, highly complex, and fast-moving market context.

Introduction (langue française)

Comme de nombreux pays à économie en développement du Sud, le Liban connait une transformation de son système alimentaire, caractérisée par l'essor des supermarchés. La relation entre les supermarchés et les détaillants traditionnels dans les pays en développement a fait l'objet d'un débat permanent : la supermarketisation est-elle inévitable ? Toutes les économies sont-elles condamnées à suivre la même trajectoire de développement du commerce « moderne » ?

Les paysages de la vente au détail de produits alimentaires ont évolué au cours des dernières décennies dans un processus appelé supermarketisation, qui est marqué par une expansion des détaillants alimentaires « modernes » pour contrôler une part croissante des dépenses alimentaires des consommateurs. Les détaillants modernes concurrencent les détaillants traditionnels, gagnant des parts de marché aux dépens de ces derniers. Des preuves empiriques étayent cette conclusion dans les pays développés comme dans les pays en développement, avec une progression des pays les plus développés vers les pays les moins développés (Reardon et al., 2007). Dans les pays en développement, la supermarketisation est décrite comme ayant évolué par vagues accélérées (Reardon & Hopkins, 2006).

La domination des supermarchés est-elle acquise d'avance ou les détaillants traditionnels peuvent-ils résister à ce raz-de-marée de modernisation ? Alors qu'une transformation de la vente au détail de produits alimentaires est généralement reconnue, les opposants soutiennent que le phénomène de supermarketisation a été trop généralisé dans sa portée : la concurrence entre les formats a été intense et les supermarchés pourraient ne jamais pénétrer complètement tous les segments de marché (Humphrey, 2007). Dans des études tirées de contextes de pays en développement sélectionnés tels que la Chine, l'Inde et le Vietnam, les auteurs montrent que le commerce de détail traditionnel a résisté, conduisant à une coexistence de la tradition et de la modernité au sein du marché (Dholakia et al., 2012 ; Hai Tran & Sirieix, 2020 ; Yuan et al., 2021).

La Signification de la supermarketisation

L'inévitabilité - ou non - de la supermarketisation est importante en termes pratiques et réels, car la domination de la vente au détail de produits alimentaires modernes aurait des impacts significatifs sur les systèmes alimentaires et leurs acteurs, allant des producteurs aux consommateurs. Cette transformation peut chasser les détaillants traditionnels du marché, éliminant leurs entreprises et leurs modèles d'emploi à une échelle potentiellement large étant donné que le commerce de détail est l'un des types les plus courants de petites entreprises et de ménages dans les pays en développement (USAID, 2019). La supermarketisation remodèle les chaînes d'approvisionnement alimentaire, favorisant généralement l'approvisionnement centralisé auprès des producteurs, grossistes et importateurs à grande échelle à l'exclusion des fournisseurs plus petits et locaux tels que les petits exploitants agricoles qui ne sont pas en mesure de répondre aux exigences de qualité, de volume et d'approvisionnement des chaînes de vente au détail modernes (Reardon et al., 2009 ; Weatherspoon et Reardon, 2002). Ces impacts généralement négatifs (mais pas universels) peuvent s'intensifier à mesure que la supermarketisation progresse : des niveaux croissants de concentration des supermarchés peuvent exacerber les déséquilibres de pouvoir et

favoriser des pratiques non concurrentielles ou un abus de pouvoir de marché par les supermarchés (Lawrence et Dixon, 2015). La supermarketisation a également des répercussions sur les consommateurs. Les supermarchés modifient la qualité, la variété, et le prix des aliments proposés aux consommateurs, ce qui a des répercussions sur leur santé, leur pouvoir d'achat et leur sécurité alimentaire. Les supermarchés peuvent aider à rendre les aliments de meilleure qualité plus accessibles aux clients (Minten, 2008 ; Woldu et al., 2013), et leur adoption de normes publiques ou privées peut améliorer la sécurité alimentaire (Wertheim-Heck et Spaargaren, 2015). Cependant, la supermarketisation a également été associée à une augmentation de l'accès et de la consommation d'aliments transformés à forte densité énergétique et à valeur nutritionnelle limitée dans les pays en développement (par exemple, Asfaw, 2008 ; Hawkes, 2008 ; HLPE, 2017 ; Qaim, 2017 ; Reardon et al., 2021 ; Umberger et al., 2015). La concurrence et le déplacement des petits détaillants alimentaires ont fait de certaines communautés des « déserts alimentaires » sans accès à divers choix alimentaires (Lee et Lim, 2009). En ce qui concerne le prix, les premières recherches ont prédit que le processus de supermarketisation réduirait le coût élevé de la distribution et de la vente au détail des aliments et élargirait la gamme de produits disponibles, au profit des consommateurs (Goldman, 1975-1976, 1981, 1982), bien que des études ultérieures aient ont constaté que la capacité des supermarchés à offrir des prix plus bas peut être retardée jusqu'à ce qu'ils réalisent des économies d'échelle et répercutent les économies sur leurs clients (Minten, 2008 ; Woldu et al., 2013). À un niveau plus macro, la supermarketisation implique la concentration du pouvoir de marché et soulève donc des questions sur la manière dont les décideurs politiques peuvent limiter, contrôler ou exploiter cette force dans la poursuite d'objectifs au sein du système alimentaire. En résumé, bien que ces impacts ne soient pas encore pleinement compris, le processus de supermarketisation est un domaine d'étude important pour ses impacts potentiels, en particulier les risques négatifs à long terme tels que l'exclusion des petits exploitants agricoles et des producteurs de l'accès aux marchés plus vastes, les effets multidimensionnels de réduction de la sécurité alimentaire et accélération de la transition nutritionnelle des consommateurs.

Bien que cette recherche ne s'intéresse pas immédiatement aux impacts de la supermarketisation, la reconnaissance de ces impacts possibles constitue une motivation forte pour comprendre le processus de supermarketisation et ses obstacles potentiels dans les contextes des pays en développement.

Le Liban comme étude de cas

Plusieurs décennies d'études universitaires sur la supermarketisation dans les contextes des pays en développement (Gorton et al., 2011 ; Reardon et al., 2009) ont permis aux chercheurs de conclure que « la supermarketisation dans le monde en développement ne fonctionne pas de manière homogène et n'a pas les mêmes effets dans tous les pays » (Tessier et al., 2010 : 1417). Cette diversité d'expérience plaide en faveur d'un champ d'étude plus large, y compris dans l'accent mis sur les études de cas par pays. Néanmoins, des preuves limitées sur le processus de supermarketisation ou ses effets ont été rapportées dans la région Moyen-Orient et Afrique du Nord (MENA) (Amine & Lazzaoui, 2011 ; Codron et al., 2004 ; Hino, 2010). Cette lacune dans la littérature s'étend au Liban (Seyfert et al., 2014).

Pour cette recherche, le cas du Liban est sélectionné comme un cas d'intérêt pour explorer l'étendue, le processus et les moteurs de la supermarketisation. Le Liban est un petit pays de la région MENA. Les supermarchés internationaux sont entrés pour la première fois dans le pays après la Seconde Guerre mondiale, se sont retirés pendant la guerre civile libanaise (1975-1990) et ont ensuite réintégré le marché.

Les supermarchés locaux ont émergé au milieu du XXe siècle. Au début des années 1990, le Liban connaissait un « décollage » des supermarchés tiré par des investisseurs locaux plutôt que par des investissements directs étrangers (IDE). Les détaillants modernes ont augmenté leur part de marché au détriment des détaillants traditionnels, représentant environ un tiers des ventes au détail de produits alimentaires et plaçant le Liban à un stade précoce du processus de supermarketisation (Codron et al., 2004). Des données ultérieures confirment que les détaillants modernes ne dominent pas encore le marché (Euromonitor International, 2022). Une étude limitée du cas libanais a d'abord identifié mais pas exploré les raisons possibles de cette croissance plus lente que prévu par le commerce de détail alimentaire moderne. Codon et al. (2004) ont expliqué le faible niveau de pénétration des supermarchés au Liban et dans d'autres pays de l'est et du sud de la Méditerranée en raison du faible IDE, à son tour le résultat de traditions culturelles non spécifiées et de contraintes politiques et administratives. Alors que des recherches explorant le rôle et les préférences des consommateurs dans le processus de supermarketisation ont été menées dans d'autres pays de la région MENA (par exemple, Amine & Hendaoui Ben Tanfous, 2012 ; Amine & Lazzaoui, 2011 ; Sadiq Sohail, 2008 ; Sehib et al., 2013). Aucune étude n'a été identifiée qui se concentre sur les consommateurs en tant que facteur favorisant ou entravant la supermarketisation dans le contexte libanais. Cette histoire soulève des questions quant à savoir si la vente au détail de produits alimentaires au Liban se modernisera comme la littérature sur la supermarketisation pourrait le prédire, tandis que la littérature disponible nous incite à nous demander si des facteurs identifiables jouent en fait un rôle dans le soutien de la présence continue de la vente au détail de produits alimentaires traditionnels. Les reportages historiques des médias sur l'entrée et la sortie des supermarchés renforcent l'hypothèse selon laquelle le processus de supermarketisation au Liban n'est peut-être pas une marche en avant inévitable, et il peut y avoir quelque chose de particulier dans ce cas pour une exploration plus détaillée.

L'examen de la transformation de la vente au détail de produits alimentaires au Liban est compliqué – et rendu plus saillant – par les événements récents. Depuis 2019, le paysage alimentaire libanais a de nouveau connu des chocs, cette fois sous la forme de crises politiques, économiques et de santé publique qui se chevauchent : une révolution politique a commencé en octobre 2019, rapidement suivie par la pandémie de COVID-19 et les perturbations du marché associées. Celles-ci se sont superposées à une crise économique marquée par une hyperinflation et parmi les plus fortes contractions observées dans le monde depuis 150 ans (Banque mondiale, 2022). Ces crises pourraient non seulement déstabiliser et remodeler le marché, mais pourraient également modifier la trajectoire préexistante de la transformation de la vente au détail de produits alimentaires dans le pays. Comme indiqué ci-dessus, l'évolution de la vente au détail de produits alimentaires a des implications dans l'ensemble du système alimentaire des pays en développement, mais l'importance de ce problème est particulièrement accrue dans un contexte de crise qui a bouleversé les conditions du marché, menacé les moyens de subsistance et sapé la sécurité alimentaire.

En somme, le Liban est un cas particulièrement intéressant pour explorer la question de la supermarketisation pour de multiples raisons. Le rythme relativement lent de la supermarketisation par rapport à d'autres expériences de pays en développement suggère que sa trajectoire peut être unique et intéressante en tant que valeur aberrante potentielle. De plus, la confluence des crises qui ont profondément choqué le Liban depuis 2019 promet d'avoir des impacts significatifs sur le paysage de la

vente au détail de produits alimentaires, offrant un cas unique pour explorer des informations sur le dialogue entre les détaillants alimentaires et les consommateurs et les implications potentielles pour l'évolution continue de la vente au détail de produits alimentaires.

Objectifs et approches de recherche

Les principaux objectifs de la recherche actuelle sont d'explorer le paysage de la vente au détail de produits alimentaires au Liban ; comprendre s'il représente un exemple de la résistance du commerce traditionnel à la domination du commerce moderne dans un contexte de pays en développement ; et de démontrer que la transformation de la distribution alimentaire est fonction de facteurs déjà identifiés dans la littérature (notamment l'assortiment et le prix des produits) mais aussi de considérations socioculturelles propres au contexte dans lequel elle s'inscrit. Pour mieux comprendre les obstacles à l'expansion des supermarchés dans des contextes de pays en développement comme le Liban, cette recherche cherche en outre à examiner la signification des formats de vente au détail et de leurs offres, les ressources culturelles qu'ils fournissent et la manière dont les consommateurs sont disposés ou capables de les animer ou non.

Cette recherche aborde ces objectifs à travers quatre articles constitutifs. L'article initial présente les principales contributions théoriques de la littérature pour comprendre le processus de supermarketisation, ses moteurs et ses modèles dans les pays en développement comme le Liban. Il examine des fils disparates mais pertinents de la littérature académique : ceux-ci couvrent l'évolution des formats de vente au détail, notamment le Big Middle et son accent sur l'assortiment et le prix des produits, et la transformation de la vente au détail de produits alimentaires dans les contextes des pays en développement, en les lisant de manière critique (à travers le prisme de Consumer théorie de la culture) et avec application au cas libanais. Le deuxième article évalue l'étendue de la supermarketisation dans le paysage de la vente au détail de produits alimentaires au Liban avant la crise, à travers une étude des comportements d'achat de produits alimentaires chez les consommateurs partisans et de leurs attitudes vis-à-vis des formats de vente au détail modernes et traditionnels. L'analyse quantitative est utilisée pour identifier les modèles de fréquentation et les préférences déclarées qui éclairent leur sélection parmi les formats de vente au détail modernes et traditionnels, et révèlent des preuves de la supermarketisation mais - conformément aux preuves trouvées ailleurs - des lacunes dans la pénétration des supermarchés. Le troisième article explore le paysage du commerce de détail alimentaire au Liban en mettant l'accent sur l'offre des détaillants alimentaires modernes. Cette étude qualitative basée sur l'observation examine attentivement l'offre des détaillants de format moderne aux consommateurs de Beyrouth et de ses environs, en tenant compte de facteurs tels que ceux soulevés dans l'analyse quantitative et avec un accent particulier sur l'environnement du magasin. Ce faisant, cet article examine dans quelle mesure les détaillants modernes adaptent leur offre au contexte socioculturel dans lequel ils opèrent et hybrident ainsi le commerce alimentaire moderne dans le contexte libanais. Quatrièmement, cette recherche revisite les comportements d'achat et les attitudes des consommateurs libanais envers les formats de vente au détail alimentaires modernes et traditionnels, en particulier dans le contexte de crise. Une enquête qualitative s'appuie sur des entretiens semi-directifs avec des consommateurs libanais pour comprendre comment les consommateurs peuvent donner du sens à l'offre des distributeurs au-delà de l'assortiment de produits et du prix, et comment les perceptions et les décisions de fréquentation peuvent

changer (ou non) dans un contexte de crise. À travers son approche en quatre volets, cette recherche montrera que, malgré une forte présence du commerce alimentaire de format moderne au Liban, le commerce traditionnel a résisté en ligne avec des considérations socioculturelles qui vont au-delà de l'offre assortiment-prix des détaillants.

Article No. 1. Les théories existantes peuvent-elles expliquer la transformation de la distribution alimentaire dans les pays en développement ? Une enquête dans le contexte libanais

Cet article analyse le processus de supermarketisation dans l'environnement de la vente au détail de produits alimentaires au Liban et propose une nouvelle approche pour comprendre la voie de l'évolution de la vente au détail dans les pays en développement. Pour ce faire, l'article passe en revue les principales théories relatives à l'évolution du commerce de détail et à la supermarketisation ; compte tenu de leurs principales caractéristiques et points communs ; et évaluer s'ils sont cohérents et pertinents pour le processus de supermarketisation dans les pays en développement, en particulier au Liban.

Méthodologiquement, cet article est structuré comme une revue critique de la littérature. Il s'appuie sur une revue narrative de la littérature, ce qui est approprié compte tenu de l'objectif de construction théorique dans une optique critique (Hammersley, 2001). Pour comprendre le processus de supermarketisation, l'article passe en revue une sélection raisonnée d'études choisies pour leur pertinence par rapport à l'objectif. Cette recherche adopte une approche globale mais non systématique de la revue de la littérature, qui est bien adaptée à une revue de la littérature la plus pertinente et pour contribuer au développement de la théorie (Dixon-Woods et al., 2006).

L'article procède à l'identification des principaux courants de la littérature concernant les théories dominantes de l'évolution du commerce de détail - classiques et plus récentes - et examine leurs principales contributions. Il s'agit notamment de la roue du commerce de détail, du Big Middle et de leur extension grâce à l'application de la théorie de la culture du consommateur (CCT). Selon la théorie de la roue de la distribution, la vente au détail innovante s'oriente initialement vers des coûts bas, des prix bas, des marges faibles et un statut inférieur. Plus tard, ils "échangent" les biens et services offerts (McNair, 1931, 1958), augmentant les coûts d'investissement et d'exploitation et créant un espace pour les nouvelles formes de vente au détail en offrant des coûts et des prix inférieurs (Hollander, 1960). La critique de la roue de la distribution a, entre autres, observé que les détaillants innovants peuvent entrer sur le marché en ciblant les consommateurs à revenu élevé, puis en « ruisselant » pour conquérir un marché plus large (Brown, 1991). Le cadre Big Middle réunit ces processus d'augmentation et de ruissellement, conceptualisant l'évolution des offres de vente au détail et l'évolution des coûts comme une concurrence pour le marché dans lequel se trouve le plus grand nombre de clients potentiels. Les détaillants entrent sur le marché en tant que détaillants à bas prix ou en tant qu'innovateurs axés sur la qualité avant de migrer vers le Big Middle en élargissant leurs gammes de produits ou en élargissant leur marché, respectivement. Les mouvements d'augmentation et de ruissellement reflètent donc la banalisation dominante des offres de vente au détail axées sur les coûts ou d'élite. La concurrence intense au sein du Big Middle est la force dynamique qui incite les détaillants à maintenir leur proposition de valeur et, en fin de compte, à faire évoluer les formats de vente au détail (Levy et al., 2005). Les facteurs environnementaux tels que les changements socio-économiques et technologiques de l'environnement de vente au détail influencent également le succès dans le Big Middle (Brown et al., 2005). Une lecture

socioculturelle du Big Middle à travers le prisme de la Consumer Culture Theory (CCT) souligne que l'offre des distributeurs s'étend au-delà de l'assortiment et du prix des produits, elle inclut des ressources culturelles (Arnould, 2005) dont les consommateurs peuvent tirer du sens (McCracken, 1986). Selon cette perspective, l'évolution au sein de l'espace de vente résulte de changements dans la combinaison des ressources culturelles que les entreprises produisent et que les consommateurs préfèrent (Arnould, 2005), plutôt que de la concurrence entre les entreprises.

Ensuite, l'article se tourne vers la littérature abordant le processus de supermarketisation à travers des études menées dans le contexte des pays émergents et en développement, qui est fortement associée à deux disciplines clés - le marketing/distribution et le développement économique - et les travaux de deux chercheurs principaux au sein des principaux courants du débat académique, Arieh Goldman et Thomas Reardon (Gorton et al., 2011). À travers une revue méta-narrative (Greenhalgh et al., 2018), l'article cherche à retracer l'évolution de ces deux axes de recherche, à les passer en revue et à identifier les points communs et les différences. Ces chercheurs abordent l'évolution de la vente au détail alimentaire avec des domaines d'intérêt distincts : Goldman (1974a, 1974b, 1975-1976) s'est intéressé au processus d'hybridation endogène par lequel les détaillants alimentaires traditionnels se transforment en formats de vente au détail modernes, ainsi qu'aux barrières qui conduisent les consommateurs adopter de manière sélective des formats de vente au détail modernes (Goldman, 1982, 2000 ; & Hino, 2005 ; et al., 2002). Les travaux de Reardon ont examiné les facteurs à l'origine de la diffusion rapide des supermarchés par vagues dans les pays en développement depuis les années 1990, notamment les investissements directs étrangers (Reardon et al., 2007), qui ont coïncidé avec la consolidation et la multinationalisation du secteur de la distribution alimentaire (Reardon et al., 2009). Les points communs dans leur travail incluent une conception partagée du processus d'expansion des supermarchés dans les pays en développement en ce qui concerne la géographie et la socio-démographie des consommateurs, cohérente avec un mouvement de ruissellement des détaillants innovants pour conquérir le Big Middle. Les différences majeures entre les perspectives de Goldman et de Reardon concernent les interrelations entre la diffusion des supermarchés et son environnement : l'analyse de Reardon s'est limitée aux relations de la chaîne d'approvisionnement, tandis que Goldman (2000 ; et Hino, 2005 ; et al., 2002) a en outre considéré le rôle du consommateur culture et sous-cultures pour comprendre les obstacles à la diffusion des supermarchés une fois les lacunes géographiques et socio-économiques comblées. Par ailleurs, la base théorique apportée par une lecture socioculturelle du Big Middle s'avère cohérente – sinon explicitement référencée – au sein des travaux de Goldman et Reardon.

Après une revue critique de la littérature, cet article teste ensuite les deux principales théories du processus de supermarketisation dans les contextes des pays en développement. Pour ce faire, l'article applique des données secondaires pour les confronter au contexte libanais. Cet article montre que les principales théories actuelles ne parviennent pas à expliquer la transformation du paysage commercial dans un tel pays en développement. Les résultats mettent en évidence la nécessité de compléter les théories actuelles en proposant une nouvelle voie d'analyse qui rende mieux compte des spécificités socioculturelles, économiques et institutionnelles, pour expliquer le processus de supermarketisation dans les pays en développement. En conséquence, l'approche socioculturelle incarnée dans la CCT offrira une compréhension meilleure et plus convaincante du processus de transformation du commerce de détail.

Cet article propose une revue critique de la littérature, mais aucune étude empirique. Cependant, la synthèse des principaux axes de recherche fournira aux universitaires/étudiants et aux détaillants un moyen de conceptualiser l'évolution et le statut du secteur de la vente au détail de produits alimentaires dans les contextes des pays en développement. Les détaillants peuvent bénéficier d'une meilleure compréhension des opportunités et des défis pour gagner des parts de marché au Liban et sur des marchés similaires.

L'originalité de cet article est sa synthèse combinatoire de la littérature sur l'évolution du commerce de détail et la supermarketisation, identifiant les points communs et synthétisant leurs forces respectives pour explorer leur pertinence dans le contexte d'un pays en développement. Ces bases théoriques sont, en combinaison, utiles pour expliquer (et prédire) comment les supermarchés sont entrés et se sont développés dans le contexte du marché en développement. Ce fondement théorique est donc approprié pour explorer l'offre des détaillants alimentaires au Liban et sa réception, sa compréhension et sa signification pour les consommateurs au Liban.

Article No. 2. Commerce de détail alimentaire et supermarketisation au Liban : comportements d'achat des consommateurs partisans

Le deuxième article de la thèse explore le paysage de la vente au détail de produits alimentaires au Liban, en mettant l'accent sur la fréquentation et les attitudes des consommateurs envers les détaillants alimentaires de format moderne par rapport aux formats traditionnels. Ce faisant, cet article nous aide à comprendre à quel point le cas libanais représente un exemple de la résistance du commerce traditionnel à la domination du commerce moderne ; ainsi que d'explorer les facteurs pertinents pour sa transformation de la vente au détail de produits alimentaires.

Cet article s'appuie sur les études de la supermarketisation dans les contextes des pays en développement entreprises par les éminents universitaires Goldman et Reardon. Tous deux considèrent la diffusion et l'adoption des supermarchés comme une fonction combinée de l'offre et de la demande de services (Goldman, 1981 ; Reardon et al., 2003), conformément à l'objectif de dominer le marché (de détail alimentaire) (Gorton et al., 2011). Dans la littérature, divers modèles et plusieurs facteurs ont été proposés pour expliquer la supermarketisation couvrant les facteurs de l'offre et de la demande. Les modèles centrés sur le client cherchent à comprendre les attributs souhaités par le client chez un détaillant, l'importance relative ou la pondération de chaque attribut, et la manière avec laquelle différents formats de vente au détail satisfont ces attributs pour leurs clients (Gorton et al., 2011). Les attributs d'intérêt couramment appliqués comprennent le prix et la qualité des produits, la gamme ou la gamme de produits offerts, l'emplacement du magasin ou la proximité des clients, l'image ou la réputation du magasin, et d'autres, y compris les caractéristiques démographiques des clients (Pan et Zinkhan, 2006). La dimension socioculturelle du commerce de détail tend à être exclue de nombreux modèles de vente au détail (Fuentes & Hagberg, 2013 : 291).

Grâce à leurs travaux combinés, ces auteurs ont également identifié l'entrée progressive et la domination des supermarchés à travers la géographie (des grandes aux petites villes) et des segments de marché socio-économiques (segments de consommateurs à revenu élevé à faible) (Goldman, 2000 ; Goldman et Hino, 2005 ; Goldman et al., 2002 ; Reardon & Swinnen, 2004), suggérant que les consommateurs plus urbains et à revenu plus élevé sont le segment de consommateurs qui initie et conduit le processus de

supermarketisation dans les pays en développement. Un troisième aspect de l'entrée progressive des supermarchés est par catégorie de produits (des produits d'épicerie emballés aux produits frais), conformément à l'adoption sélective des supermarchés par les consommateurs qui peuvent continuer à acheter des produits frais ou périssables chez les détaillants traditionnels (Goldman, 1982, 2000 ; Goldman & Hino, 2005 ; Goldman et al., 2002).

Sur cette base, cet article applique un modèle centré sur le client, une approche quantitative et des données d'enquête primaires originales pour évaluer l'étendue et les moteurs de la supermarketisation au Liban. Cette recherche se concentre sur les comportements d'achat alimentaire et les attitudes des consommateurs cibles - le segment de consommateurs urbains à revenu élevé dont on aurait dû s'attendre à ce qu'il fasse avancer la supermarketisation. Cette recherche s'appuie sur une enquête originale auprès de plus de 200 consommateurs libanais, qui a été menée avant le début des crises qui affectent actuellement le Liban. Il soumet les réponses à l'enquête à une analyse descriptive et quantitative, afin de déterminer dans quelle mesure ces consommateurs urbains à revenu élevé ont adopté les supermarchés et les facteurs favorisant ou retardant cette transition.

Les résultats montrent que les consommateurs interrogés ont adopté les supermarchés de manière sélective, affichant des comportements d'achats croisés : ils ont généralement acheté des aliments non périssables dans les supermarchés et les épiceries et des denrées périssables (fruits et légumes frais, viande, poisson et produits de boulangerie) auprès des détaillants traditionnels. Les caractéristiques démographiques et les attributs liés au détaillant sont corrélés avec l'endroit où les consommateurs ont fait leurs achats et les aliments qu'ils ont achetés auprès de différents types de détaillants. L'emplacement du détaillant et le temps de déplacement sont significativement associés au choix du détaillant par les consommateurs. Les consommateurs libanais ont donné la priorité à la qualité des aliments, à la gamme de produits, à l'emplacement des magasins et à la réputation lorsqu'ils ont choisi où acheter de la nourriture. Les consommateurs ont évalué favorablement les supermarchés par rapport aux détaillants traditionnels en ce qui concerne la gamme de produits, la réputation des magasins, la disponibilité des produits spécialisés et les prix. Cette recherche fournit la preuve que même les consommateurs libanais les plus urbains à haut revenu n'ont pas encore abandonné les formats traditionnels de vente au détail de produits alimentaires et que le marché libanais est loin d'une transformation complète de la vente au détail de produits alimentaires.

En termes de contribution, cette recherche répond à l'appel à une exploration plus approfondie du processus et des moteurs de la supermarketisation dans les pays en développement, et plus particulièrement au rôle des consommateurs en tant qu'agents qui informent et façonnent le paysage de la distribution alimentaire (Fuentes & Hagberg, 2013 ; Paul et al., 2016). Avec son exploration détaillée des comportements et des attitudes d'achat alimentaire dans un contexte sous-étudié, le Liban, cette recherche offre des preuves empiriques supplémentaires à l'évaluation plus large de la supermarketisation dans les pays en développement. De plus, cette étude a une valeur particulière compte tenu de son contexte unique : cette recherche fournit une vue historique sur les comportements d'achat alimentaire des consommateurs libanais, ce qui est précieux à la lumière des récents chocs (politiques, économiques et de santé publique) affectant le Liban et qui devraient avoir un effet significatif sur le système alimentaire du pays. En offrant une base de référence avant la crise, cette recherche peut

aider les futurs chercheurs à comprendre comment ces crises ont pu affecter la vente au détail de produits alimentaires dans le pays.

Article No. 3. Hybridation du paysage de la distribution alimentaire au Liban ? Observations de l'offre des détaillants alimentaires modernes aux consommateurs

Le troisième article de cette thèse cherche à explorer le paysage de la vente au détail de produits alimentaires au Liban et le rôle des considérations socioculturelles dans la conduite ou l'entrave de la transformation de la vente au détail de produits alimentaires. Pour ce faire, il examine l'offre des détaillants au consommateur libanais, en se concentrant sur l'environnement de magasin des détaillants de format moderne, y compris l'assortiment de produits et les ressources culturelles qui y sont fournies. Cet article recherche des preuves que les détaillants de format moderne se sont hybridés dans le but d'adapter leur offre à la demande des consommateurs locaux, reflétant une évolution possible du paysage de la vente au détail de produits alimentaires au Liban.

Cet article est ancré dans la littérature sur la transformation du commerce de détail, en particulier le cadre Big Middle (Levy et al., 2005) et sa lecture socioculturelle à travers le prisme de la théorie de la culture de consommation (CCT) qui envisage l'offre du détaillant comme une combinaison d'assortiment de produits, de prix, et les ressources culturelles (Arnould, 2005 ; Arnould & Thompson, 2005 ; Badot & Paché, 2005). L'environnement du magasin de détail où les gens font leurs achats et avec lequel les gens interagissent, ainsi que les symboles qu'ils portent, font également partie de l'offre (Arnould, 2005). Selon cette perspective, l'évolution au sein de l'espace de vente au détail n'est pas le résultat de la concurrence des entreprises mais plutôt le résultat de changements dans la combinaison des ressources culturelles que les entreprises produisent et que les consommateurs préfèrent (Arnould, 2005).

En ce qui concerne spécifiquement la transformation de la vente au détail de produits alimentaires, cet article s'appuie sur la littérature sur la supermarketisation et les contributions de Goldman et Reardon, entre autres. Dans les pays en développement, le processus de supermarketisation a été associé à l'entrée de détaillants étrangers de format moderne via l'investissement direct étranger (Reardon et al., 2003). Les détaillants étrangers entrent généralement dans les pays en développement en transférant leur offre nationale réussie (Grosso et al., 2018), bien que la mesure dans laquelle ce modèle commercial est adapté au contexte d'un pays en développement peut varier (das Nair, 2018). Goldman (1974a, 1974b, 1975-1976) a prédit que les distributeurs des pays en développement adapteraient leurs formats aux conditions locales de manière à hybrider leur offre : les distributeurs étrangers entrant dans un pays en développement s'hybrideraient en fonction du contexte local, tandis que les détaillants modifieraient leur offre pour concurrencer les nouveaux entrants. Les chercheurs ne sont pas d'accord sur la question de savoir si une approche centrée sur le client est une stratégie efficace pour les détaillants modernes (étrangers ou locaux) à poursuivre dans les contextes des pays en développement (Ger, 1999 ; Gupta et Ramachandran, 2021), où ils sont toujours confrontés à une concurrence intense de la part des détaillants traditionnels qui peuvent mieux adapter leur offre commerciale au contexte local (Grosso et al., 2018).

Si le transfert du commerce de détail de format moderne – le modèle du supermarché – des pays développés vers les pays en développement est une forme de mondialisation, son adaptation ou son hybridation dans un contexte de pays en développement peut être considérée comme une forme de glocalisation. Le terme glocalisation fait référence à l'adaptation et à l'objectivation des structures de

différence commune dans des contextes locaux (Kjeldgaard & Askegaard, 2006, citant Robertson, 1992). D'un point de vue macro, la glocalisation se produit lorsque le marché mondial se matérialise dans des contextes locaux (Kjeldgaard et Askegaard, 2006) et qu'un processus d'hybridation produit de nombreuses adaptations et traductions locales de modèles internationaux ou mondiaux (Wilk, 1998).

Afin d'évaluer l'offre d'un commerçant et dans quelle mesure un modèle de commerce a été adapté ou hybride, les caractéristiques de cette offre doivent être prises en compte. Dans son examen du marketing de détail, Mulhern (1997) classe ces caractéristiques en fonction des décisions stratégiques ou tactiques d'un détaillant. Les décisions stratégiques concernent l'emplacement du magasin ; le positionnement du magasin, y compris en termes de prix et de qualité, l'assortiment de produits et les marques du magasin ; l'image de l'enseigne ; environnement physique; et service de vente au détail. Les décisions tactiques concernent plutôt les prix, la promotion, la publicité, les présentoirs en magasin et l'espace en rayon. Les caractéristiques liées à l'offre du détaillant peuvent être visibles pour le consommateur, alors que les caractéristiques liées au savoir-faire du détaillant ont tendance à être tacites ou cachées à la vue du client (Goldman, 2001).

Fort de cette base conceptuelle, cet article applique des méthodes qualitatives comme une approche valable pour évaluer les environnements de vente au détail de produits alimentaires en tant que reflet de leur offre aux consommateurs. Cet article s'appuie sur des observations structurées de cinq détaillants alimentaires de format moderne opérant dans et autour de Beyrouth, au Liban, avec une sélection raisonnée pour assurer la variation de l'origine de la propriété (locale et internationale) et du format spécifique (hypermarché, supermarché, magasin discount). Les observations ont été entreprises au début de 2020, avant l'éruption totale du COVID-19 ou l'effondrement économique du Liban. Les observations structurées se concentrent sur les artefacts matériels et les riches détails du contexte de consommation (Peñaloza & Cayla, 2006). Dans le commerce de détail, le point de vente est l'interface par laquelle les consommateurs interagissent avec les intentions marketing des détaillants, modérées par les actions du personnel qu'ils contactent. L'observation de cet artefact – en l'occurrence, les aspects de l'offre visibles pour les consommateurs – est donc particulièrement adaptée pour comprendre comment la supermarketisation progresse par hybridation et traduit les flux de glocalisation au Liban.

Les résultats de l'article montrent que les détaillants alimentaires modernes opérant au Liban adaptent leur offre aux demandes du marché local de manière sélectionnée, conformément à la littérature sur la glocalisation et l'hybridation du commerce de détail alimentaire dans les contextes des pays en développement. Cette recherche fournit également des preuves que les détaillants alimentaires de format moderne opérant à l'international peuvent importer des formats et des pratiques, façonnant ainsi l'offre (et les attentes) des consommateurs locaux. Enfin, la variation de l'ambiance des magasins est interprétée comme une preuve que les détaillants de format moderne tiennent compte des facteurs socioculturels dans leur offre aux clients, en concurrence sur des aspects au-delà de l'assortiment de produits et du prix.

Cet article apporte plusieurs contributions. Cet article va au-delà des preuves quantitatives existantes pour explorer ce que divers détaillants alimentaires offrent au consommateur libanais et documenter une vue détaillée au niveau micro du paysage de la vente au détail de produits alimentaires au Liban. S'appuyant sur la lecture socioculturelle du cadre Big Middle, il étudie l'offre de commerce de détail de

format moderne aux consommateurs avec une attention particulière à l'assortiment de produits et aux ressources socioculturelles (les niveaux de prix dépassent le cadre de cette recherche). Cet article offre un aperçu de la façon dont l'hybridation du modèle de supermarché prend forme dans un contexte de pays en développement. Ce faisant, cet article répond aux lacunes identifiées dans la littérature, notamment le besoin d'une meilleure connaissance de la vente au détail de produits alimentaires basée sur le marché dans les pays en développement et de leur contribution à l'environnement alimentaire plus large (Turner et al., 2018). Il est important de documenter les environnements de vente au détail de produits alimentaires tels qu'ils existent pour comprendre l'évolution à plus long terme des environnements de vente au détail de produits alimentaires. Séparément, et si elle est lue en combinaison avec des preuves de ce que les consommateurs libanais recherchent (prétendent) de la vente au détail de produits alimentaires et des ressources qu'ils souhaitent actualiser dans leur processus d'achat de produits alimentaires, cette recherche peut servir à répondre à la question de savoir si la vente au détail de produits alimentaires modernes répond à la demandes des clients ou non ; et, par conséquent, si un désalignement pourrait expliquer la lenteur de la supermarketisation au Liban.

Article No. 4. Achats alimentaires en crise : les effets combinés de la révolution, de l'effondrement économique et du COVID-19 sur les comportements et les attitudes d'achat alimentaire au Liban

Avec ce quatrième article, cette recherche vise à examiner comment les consommateurs animent l'offre et les ressources culturelles proposées par les enseignes au Liban, et ainsi démontrer que la transformation de la distribution alimentaire est fonction de facteurs déjà identifiés dans la littérature (notamment l'assortiment et le prix des produits) mais aussi de considérations socioculturelles propres au contexte dans lequel elle se déroule. L'article permet également de comprendre si les considérations socioculturelles sont un facteur explicatif de la résistance du commerce traditionnel à la domination du commerce moderne dans ce contexte de pays en développement. Il offre une valeur supplémentaire dans l'exploration de ces questions dans un contexte de crise.

Cet article utilise comme fondement conceptuel une lecture socioculturelle du cadre Big Middle, qui cherche à expliquer la transformation du commerce de détail. Le cadre Big Middle conçoit l'évolution des formats de vente au détail - tels que le commerce de détail alimentaire moderne - en fonction des tentatives concurrentielles des détaillants de capturer le plus grand nombre de clients potentiels grâce à une combinaison d'assortiment de produits et de prix attractifs (Levy et al., 2005). Les changements dans l'environnement du commerce de détail, qu'ils soient géographiques, technologiques ou socio-économiques, peuvent également influencer le succès dans le Big Middle (Brown et al., 2005). Une lecture socioculturelle du Big Middle, ancrée dans une compréhension culturelle des marchés, soutient que le succès du commerce de détail dépend également de sa capacité à fournir une valeur socioculturelle et à donner du sens aux consommateurs (Arnould, 2005 ; Arnould & Thompson, 2005), fixant ainsi comme objectif de recherche valable de comprendre comment les consommateurs perçoivent et donnent du sens à l'offre proposée par les détaillants (alimentaires modernes). Néanmoins, le rôle du consommateur dans la transformation du commerce de détail a été généralement négligé dans la littérature (Fuentes & Hagberg, 2013 ; McArthur et al., 2016).

Ensuite, cet article se tourne vers la littérature académique pour mieux comprendre les impacts théoriques et empiriques de diverses crises sur le commerce de détail, à commencer par les crises économiques. Les recherches explorant l'impact de la crise économique sur l'évolution du commerce de détail sont limitées et offrent des conclusions contradictoires quant au rôle de la crise dans le changement de trajectoire de cette évolution. La crise peut inciter les entreprises et les entrepreneurs à innover, à développer de nouveaux produits et services et à modifier ou faire pivoter leurs modèles commerciaux dans le but d'exploiter de nouvelles opportunités (Manolova et al., 2020 ; Portuguez Castro & Gómez Zermeño, 2021) et de gagner à la fois des clients et part de marché (Favaro et al., 2009). La crise économique contribue ainsi à expliquer l'émergence historique des formats de distribution à bas prix (Brown, 1987). Pour Evans (2011), cependant, la crise économique ne modifie pas le processus concurrentiel des entreprises et ne modifie donc pas fondamentalement le cours ou le rythme de la transformation du commerce de détail.

La littérature sur la transformation de la distribution alimentaire dans les contextes des pays en développement offre peu d'informations sur les impacts de la crise économique sur ce processus. La recherche sur la supermarketisation, en particulier le volet enraciné dans les travaux de Reardon, se situe dans un récit de mondialisation et de modernisation incessantes. Redon et al. (2003) notent le rôle de la croissance économique et de l'augmentation des revenus, en particulier parmi les consommateurs de la classe moyenne, comme moteur de la supermarketisation. L'impact d'une crise ou d'un choc sur le processus de supermarketisation et la relation entre les détaillants alimentaires modernes et les consommateurs n'est pas bien étudié. Des études empiriques ont associé la crise économique à la conscience des prix chez les consommateurs et au succès des magasins discount et des hypermarchés en Asie et en Amérique latine (Ang et al., 2000 ; Zurawicki et Braidot, 2005), mais n'ont pas exploré les impacts différentiels sur les segments de vente au détail modernes par rapport aux segments traditionnels. Plus récemment, Maumbe et Chikoko (2020) ont conclu que deux décennies de difficultés macroéconomiques au Zimbabwe ont entravé mais pas stoppé l'entrée et la croissance des supermarchés dans ce pays.

Les recherches les plus récentes sur lesquelles s'appuie cet article sont les études émergentes de la pandémie de COVID-19 sur les comportements alimentaires des consommateurs et les modèles de clientèle de détail. Des études menées dans divers contextes nationaux indiquent que le comportement d'achat de produits alimentaires a subi des changements importants depuis la COVID-19 en ce qui concerne le volume, la composition et la fréquence des achats alimentaires (par exemple, Iranmanesh et al., 2022 ; Loxton et al., 2020), ainsi que l'achalandage selon la localisation des magasins et le format de vente (e.g., Ben Hassen et al., 2022 ; Chenarides et al., 2021 ; Cranfield, 2020 ; Thompson et al., 2022). De nouvelles recherches suggèrent que la COVID-19 pourrait avoir provoqué des changements persistants et à plus long terme dans les attitudes et les comportements des consommateurs concernant les achats alimentaires, avec des implications importantes pour les environnements alimentaires et les détaillants alimentaires (Cummins et al., 2021 ; Thompson et al., 2022). Les lacunes de cette littérature émergente incluent le besoin d'explorations qualitatives de la phénoménologie de l'expérience et de la réaction aux crises telles que la COVID-19 (Ntontis et al., 2022 ; Thompson et al., 2022).

Cette étude vise à combler diverses lacunes dans la littérature à partir de laquelle elle s'appuie. Pour ce faire, cet article explore le rôle que jouent les supermarchés pour les consommateurs libanais avant et pendant une période de crises qui se chevauchent (révolution politique, COVID-19 et effondrement économique) et cherche à en déduire leurs implications potentielles pour le processus de supermarketisation à plus long terme dans le pays. Cette étude applique des méthodes qualitatives et des données recueillies à travers la conduite de 20 entretiens individuels semi-structurés avec des adultes résidant au Liban qui assument la responsabilité des courses alimentaires pour eux-mêmes et/ou leurs ménages. Les données ont été recueillies en juin 2020, plusieurs mois après le déclenchement de la révolution politique et le début de la COVID-19, et à un moment où la contraction économique prenait de l'ampleur. Des méthodes qualitatives ont été appliquées, le cas échéant, pour comprendre les attitudes et les motivations des consommateurs, ainsi que la phénoménologie de la vie en crise.

Les résultats confirmeront que les consommateurs libanais présentent des schémas d'achats croisés, s'appuyant sur une combinaison de formats de vente au détail modernes et traditionnels pour satisfaire leurs besoins alimentaires, et suggèrent que les consommateurs libanais perçoivent l'expérience d'achat alimentaire comme l'un des plus qu'un simple échange de des biens contre de l'argent, conformément à la lecture socioculturelle du cadre Big Middle. On trouvera un éventail de facteurs influençant leur choix de destination d'achat alimentaire, allant de ceux identifiés dans les théories de la vente au détail grand public (prix, assortiment de produits) à l'activation au niveau individuel de la création de sens et d'identité décrite dans le CCT. Les changements dans les modèles de fréquentation des magasins de détail seront liés aux impacts spécifiques de la crise, notamment les fermetures de routes, les problèmes de santé croissants et l'inflation rapide des prix des denrées alimentaires. Ces changements, y compris une plus grande dépendance aux services de livraison, ne favoriseront pas uniformément les détaillants modernes ou traditionnels, ce qui suggère des impacts ambigus sur la trajectoire future de la supermarketisation et de la transformation du commerce de détail au Liban.

Cet article vise à offrir plusieurs contributions. Sa principale contribution est d'explorer les significations socioculturelles que les consommateurs libanais tirent de leurs interactions avec les détaillants alimentaires, l'importance de cette production de sens dans la clientèle des consommateurs et les impacts de la crise sur les deux. Sur le plan académique, cet article contribue à une littérature limitée qui explore l'impact de la crise sur les environnements de vente au détail de produits alimentaires et la transformation de la vente au détail de produits alimentaires. Alors que le phénomène de supermarketisation est généralement étudié dans un contexte de croissance économique, cette étude situe son examen dans le contexte unique des crises politiques, de santé publique et économiques qui se chevauchent au Liban. Sur le plan méthodologique, cet article aborde les lacunes perçues dans la littérature en appliquant des méthodes qualitatives pour explorer la phénoménologie de la crise au Liban, et plus particulièrement comment la crise a affecté l'interaction des détaillants et des consommateurs et l'activation par les consommateurs des ressources comparatives offertes par les détaillants modernes et traditionnels. Sur le plan managérial, l'article cherche à offrir un aperçu des changements dans les préférences et les habitudes d'achat des consommateurs en matière d'alimentation, ce qui peut aider les détaillants à ajuster leur offre dans un contexte de marché incertain, très complexe et en évolution rapide.

Can Existing Theories Explain Food Retail Transformation in Developing Countries? An Investigation in the Lebanese Context

Abstract

Purpose: This article analyzes the supermarketization process in Lebanon's food retail environment and proposes a new approach to understand the main pathway of retail evolution in developing countries. The article does this by reviewing key theories relevant to supermarketization; considering their main features and commonalities; and assessing whether they are coherent and relevant to the process of supermarketization in developing countries, specifically Lebanon.

Design/Methodology/Approach: A comprehensive review of the mainstream literature integrates key strands of this literature – classical and more recent, from distinct academic disciplines. Major contributions to the literature were identified as potentially relevant to the case at hand: classical marketing theories that seek to explain retail evolution (Wheel of Retailing), more recent theories that build on or enrich earlier conceptualizations (Big Middle, Consumer Culture Theory), and the supermarketization literature developed by Goldman and Reardon that focuses specifically on food retail transformation. The research draws on secondary data from Lebanon to test the explanatory power of these theories.

Findings: The application of secondary data from Lebanon reveals that the leading current theories fail to explain retail landscape transformation in developing countries. Instead, the socio-cultural approach embodied in Consumer Culture Theory offers a better and more compelling understanding of the retail transformation process in Lebanon.

Research Limitations: This paper provides a critical literature review, but no empirical study.

Practical Implications: The synthesis of major research strands provides academics/students and retailers a means to conceptualize the evolution and status of the food retail sector in developing country contexts. Retailers may benefit from a clearer understanding of the opportunities and challenges to gain market share in Lebanon and similar markets.

Originality/Value: This paper provides a combinatory synthesis of retail evolution and supermarketization, identifying commonalities and synthesizing their respective strengths to explore their relevance to a developing country context. This paper illustrates how scholars can advance the study of retail transformation in MENA, including through further empirical and conceptual research.

Keywords: Retail Evolution; Food Retail; Supermarketization; Lebanon

Background

Supermarketization is the process of expansion of modern food retailers – chains of large-format, self-service stores selling food and household goods – in competition with traditional food retailers such as specialized retailers (greengrocers, bakers, butchers) and independent, "mom and pop" grocery stores. The topic has gained attention in the academic literature across disciplines in recent decades, given growing recognition of its impacts throughout the food system: Supermarketization affects the food chain, from consumers to producers, and from the micro-level (individual) to meso-level (sectoral) to macro-level (national, international) (e.g., D'Andrea *et al.*, 2006; Thomas Reardon *et al.*, 2009; Timmer, 2009). Supermarketization may impact food security, affecting access to food or the nutritional quality of food available; and food sustainability, as modern food retailers have become a major driver of agricultural and food production globally (HLPE, 2017).

Lebanon's process of supermarketization has been slower than scholars anticipated, particularly in comparison to other countries in the Middle East and North Africa (MENA) that have similar or higher rates of per capita income and urbanization (Seyfert et al., 2014). Modern retailers have not definitively replaced traditional food retailers, as elsewhere in the region, controlling less than 50% of food sales (Bahn & Abebe, 2017).

The primary objective of this article is to analyze the process of supermarketization in Lebanon through the lens of existing theories of retail transformation, and to propose a new, socio-cultural approach to understand better this process. To do this, the article identifies existing theories and perspectives relevant to the process of supermarketization; considers their main features and commonalities; and assesses whether they are coherent and can contribute to understand the process of supermarketization in Lebanon, a small, Eastern Mediterranean country that may challenge their applicability. This research stops short of exploring the effects of food retail transformation in Lebanon in detail. While an increasingly rich literature demonstrates the effects of food retail transformation may pertain to food supply chain and retail structures and functions (e.g., Reardon et al., 2019), product assortment and prices, and consumer food consumption patterns and health outcomes (e.g., Hawkes, 2008; Qaim, 2017; Reardon et al., 2021; Umberger et al., 2015), we focus on the processes of supermarketization of the retail sector in Lebanon.

Methods and Data Collection

As this research addresses a broad research question, a narrative review of the literature was selected as a suitable methodology given our objective of theoretical construction within a critical lens (Hammersley, 2001). To achieve this, we followed an interpretive, iterative approach (Dixon-Woods et al., 2006) incorporating the logics of hermeneutic and meta-narrative reviews (Greenhalgh et al., 2018) to understand the process of supermarketization. In the stages identified hereafter, we reviewed a purposive selection of studies chosen for relevance to our objective within a perspective that is interpretive, critical, and oriented to theoretical construction. This research thereby takes a comprehensive but non-systematic approach to the literature review, building on rather than replicating existing, systematic reviews (referenced below). The non-systematic approach is useful in building a body of knowledge, and may be as impactful as a systematic review (Perényi & Losoncz, 2018). Moreover, as we sought neither to produce an exhaustive presentation of the literature nor an aggregative analysis of empirical case studies, the non-

systematic approach was best suited to our objectives in reviewing the most relevant literature and contributing to theory development (Dixon-Woods et al., 2006).

Table 1. Key Publications Reviewed, Classed by Theme

Theme	Publications
Theories of retail evolution	
- Wheel of Retailing	McNair (1931, 1958), Hollander (1960), Davidson *et al.* (1976), Brown (1987, 1991)
- Big Middle	Levy *et al.* (2005), Brown *et al.* (2005), Volle *et al.* (2008)
- Consumer Culture Theory	McCracken (1986), Arnould (1995, 2005), Arnould & Thompson (2005), Herbert *et al.* (2018)
Supermarketization in developing country contexts	Goldman (1974a, 1974b, 1975, 1975-1976, 1978, 1981, 1982, 1991, & Qin, 1998, 2000, *et al.*, 2002, & Hino, 2005), Dries *et al.* (2004), Reardon (& Swinnen, 2004, *et al.*, 2007, *et al.*, 2009), Timmer (2009), Lu & Reardon (2018)

First, for the mainstream theories of retail evolution, major strands of the literature have been identified and central contributions reviewed, building on historically dominant or transformative theories of retail evolution. A review of theories explaining the evolution of retail formats led us to focus on the Wheel of Retailing, with its trading up and trickle down mechanisms; how this has been integrated into the most globalizing theory, the Big Middle, which shifts the analytical focus of the evolution of retailing from the retailers to the market for consumer goods; and how these have been extended further by Consumer Culture Theory (CCT), which considers the retail evolution as a co-production between retailers and consumers. Second, we sought to understand the process of supermarketization through studies undertaken in the context of emerging and developing countries. This led us to identify two key disciplines – marketing/retailing and economic development – and the work of two principal researchers[7] within the main strands of the academic debate (Gorton et al., 2011). Historically, the first approach is based on the works of Goldman (1974a), who explores the modernization processes internal to traditional retailers. Later, Reardon (Dries et al., 2004) introduced the role of foreign direct investment (FDI) to explain the rapid development of supermarkets in developing countries. Through this meta-narrative review (Greenhalgh et al., 2018), our objective was to retrace the evolution of these two lines of research, review them separately, and put them in perspective to identify commonalities and distinctions, without overlooking the historical context of their publication. Third and finally, we confront these theories in the

[7] The Web of Science Author Record (Beta) tool reports for Arieh Goldman an H-index of 10 and 567 citations on 12 publications; and for Thomas Reardon, an H-index of 38 and 5,354 citations on 99 publications (data retrieved December 15, 2020).

Lebanese context. We have done so to test the two leading theories of the supermarketization process, while taking care to re-inscribe them within the more general framework of retail evolution. To achieve this, secondary data has been retrieved from multiple academic and applied sources, specific to Lebanon.

Results highlight the need to complement actual theories by proposing a new path of analysis that better accounts for socio-cultural, economic, and institutional specificities, to explain the process of supermarketization in developing countries.

Mainstream Theories of Retail Evolution

The explanation and prediction of retail formats' evolution is one of the most regular quests of marketing research (Brown, 1987). Many attempts to discover a general theory explaining the succession of retail formats over time and space have been made (for reviews, see Brown, 1987; Evans et al., 1993; Levy et al., 2005; McArthur et al., 2016), but generalization and predictive power lack once contrasting environmental settings – such as less developed and emerging countries – are considered (Brown, 1991; Evans, 2011; McArthur et al., 2016).

In this section, we introduce McNair's (1931, 1958) Wheel of Retailing (WoR) as the most popular theory of retail change (Brown, 1991). Next, we consider the theory of the Big Middle (Levy et al., 2005) that builds on the WoR to explore how large-scale retailers evolve to conquer market share. We then question how such theories propose to understand the interweaving of retailing and its socio-cultural context.

WoR and the Conquest of the Big Middle

McNair (1931, 1958) originated the WoR to explain evolutionary patterns within the retail sector and to anticipate future innovations. Under this theory, innovation in retailing initially orients toward low costs, low prices, low margins, and low status. Over time retailers "trade up" the goods and services offered, raising investment and operating costs. Newer retailing forms offering lower costs and prices enter the market and compete with established retailers (Hollander, 1960). Criticisms of the WoR include that it is too narrow, does not hold for all retail types, and does not explain the factors driving wider changes in retailing (Hollander, 1960); that it focuses on cost and gross margin relationships, overlooking non-price innovations; that it neglects the pace of innovation and so is less relevant to understand future developments (Davidson et al., 1976); and that it is in some assertions simply wrong (Goldman, 1975, 1978). Indeed, not all retail formats appear on the market with a low-price, low-status strategy (Goldman, 1975). Some innovative retailers enter the market with a more attractive offering targeting higher-income consumers, then follow a "trickle-down" movement to conquer a broader market (Brown, 1991).

These trading-up and trickle-down processes are brought together in the framework of the Big Middle. Levy et al. (2005) propose a general, market-based framework to understand retail offerings and cost evolution. The Big Middle is "the marketspace in which the largest retailers compete in the long run, because there is where the largest number of potential customers reside" (Levy et al., 2005: p. 85). The largest and most successful retailers are drawn to the Big Middle over time, seeking economies of scale, higher revenues, and incremental profits. Within this framework, retailers generally enter the market as low-price retailers or as innovators before migrating to the Big Middle. Low-price retailers initially focus on price-oriented market segments. Innovative retailers initially focus on quality-oriented market segments. These strategic options conform to two archetypal business models: The former "enrich the

value proposition to gain in attractiveness"; the latter "optimize resources and competences to gain in efficiency" (Volle et al., 2008: pp. 135 & 139). Retailers shifting to the Big Middle often expand their offerings by broadening and deepening their product lines or by widening their market, becoming volume-driven and generalist firms, respectively. Retailers in the Big Middle focus on their value offerings, evolving from their initial niche to a hybrid position offering innovation and low prices and thereby satisfying a mass market or large market segment. Trading-up and trickle-down movements thus reflect the mainstream commoditization of either cost-driven or elite retail offerings. What lacks is a better understanding of how product and market specialist strategies can combine with innovation and low-price strategies to determine market success or failure, and to determine a transition to the Big Middle (Levy et al., 2005).

Intense competition in the Big Middle drives retailers to continuously maintain their value proposition, often by developing new organizational structures and investing in fixed assets oriented towards a volume-based retail model. The Big Middle is therefore dynamic, evolving over time. Big Middle retailers may be threatened by their own institutional inabilities to adapt to changes, or to recognize and respond to threats from innovative or low-price retailers. Big Middle retailers that fail to maintain their value proposition become retailers in trouble, unable to compete effectively. They may become marginal players, transition again into the innovative or low-price segments, or exit the market (Levy et al., 2005). Brown et al. (2005) argue that retailers that succeed in the Big Middle must operate multiple outlets that appeal to a range of customers, obtain increasing returns from the same number of outlets, and master supply chain management, achieving efficiency along the entire chain and across all partners. Success within the Big Middle further depends on geographic, technological, and socioeconomic changes to the retail environment, although understanding the linkage(s) between environmental factors and the Big Middle remains an area for further research.

A possible limitation of the Big Middle framework is that it was conceptualized based on experience in the United States, considering the performance of department stores and their competitors (namely, Wal-Mart) (Levy et al., 2005), with unclear applicability to other countries and other types of retailing. Brown et al. (2005) argue that the Big Middle applies to all economies in which large-scale retailing has developed, though its features will vary across countries depending upon their level of economic development, etc. Indeed, the Big Middle framework has been successfully applied to an analysis of supermarketization in Thailand (Gorton et al., 2011) and more recently to Brazil's apparel sector (Miotto & Parente, 2015).

A Socio-Cultural Reading of the Big Middle

Arnould (2005) offers a comprehensive reading of the Big Middle within Consumer Culture Theory (CCT) to argue that retailers provide not only goods and services, but rather a range of cultural – economic, utopian, ludic, and temporal – resources. CCT is a research tradition that "explores the heterogeneous distribution of meanings and the multiplicity of overlapping cultural groupings that exist within the broader sociohistoric frame of globalization and market capitalism, [within which] consumer culture denotes a social arrangement in which the relations between lived culture and social resources, and between meaningful ways of life and the symbolic and material resources on which they depend, are mediated through markets" (Arnould & Thompson, 2005: p. 869). Accordingly, people shop for a variety

of reasons and apply their own economic, social, and ideological resources in that process. Meanwhile, "Retailers compete to provide the most compelling array of cultural resources to consumers, not merely lower prices or better assortments" (Arnould, 2005: p. 91). Through their assortment function – which consists of filtering, arranging, promoting (Hirschman & Stampfl, 1980) and influencing producers' offerings and creating their own ones (Hirschman, 1981) – Big Middle retailers forge and shape symbols of popular culture. Assortments, however, are only part of the resources that retailers propose to consumers. Their retailing formats, where people shop and with which people interact, and the symbols they carry are part of the offering. Purchase is secondary on many shopping trips (Arnould, 2005). Critically, the resources retailers provide are inanimate until consumers activate and mobilize them, in a process called meaning transfer (McCracken, 1986). This process is, however, context-specific as "cultural context limits the scope and dimensions of variation in the relationships between the resources provided (e.g., myths, values, norms, symbols, traditions) and the use values that consumers are willing and able to extract from them" (Arnould, 2005: p. 91).

According to this perspective, evolution within the retail space is a result of changes in the combination of cultural resources that firms produce and that consumers prefer (Arnould, 2005), and not firm competition as per the WoR theory. As change occurs in society, with increasing consumer uncertainty and doubt, resulting in an even more heterogeneous distribution of meanings, lifestyles, and "timestyles," the retail landscape should be increasingly fragmented with retailers experimenting with various retail formats to align with consumers' malleable and unfixed preferences (Herbert et al., 2018).

Though this socio-cultural approach concentrates on the retailer-consumer interface, Arnould (1995) has applied it to research on the impact of environment on marketing channels, observing that results obtained in the Western context may not perfectly fit developing country distribution networks and challenging some assumptions. Indeed, "Marketing systems are culturally specific, locally adaptive systems in which neither constructs nor meaning are predetermined by the variant general characteristics of markets" (Arnould, 1995: p. 121).

Retailing's Evolution in Emerging and Developing Regions

Equipped with this theoretical background, we now investigate how research in emerging or less-developed country settings conceptualizes retail evolution and the supermarketization phenomenon. This geographical focus is relevant in line with our objective to understand whether the evolution in Lebanon's food retail landscape will align with the pathways explored in the existing literature.

Emerging and less-developed countries are assumed to exhibit features of traditional retailing and marketing channels that inevitably transform to adopt modern retail formats as development occurs. Though many studies of supermarketization in emerging or less-developed countries are available, two main research schools are identifiable and offer different perspectives (Gorton et al., 2011). The first, earlier school builds on the work of the marketing/retailing scholar Arieh Goldman, while the second and later school revolves around Thomas Reardon's contributions to development economics. We present both approaches in this section.

Goldman's Perspective: Modernization of Retailing in Emerging Countries

Goldman has mainly studied retail dynamics and change, believing that more efficient distribution systems would help improve the "living styles" of consumers, specifically lower income and disadvantaged consumers ("Arieh Goldman 1939–2008," 2008). His research on retail change spans the 1970s to the late 1990s, and regions including South America, East Asia, and MENA. His work largely occurs before or during retailers' internationalization process (Reinartz et al., 2011), so is insightful regarding the pitfalls slowing retail modernization and the development of supermarkets with a pronounced look at less developed and emerging countries.

Goldman (1975-1976, 1991; & Qin, 1998) considered that retail modernization in developing countries should not necessarily follow the same path or adopt the same features as in Western countries. Regarding formats, Goldman (1974a, 1974b, 1975-1976) first had an interest in endogenous retail modernization and questioned the conditions for traditional food retailers to transform their businesses to fit key characteristics of "modern retailing" (broadening assortment to include fresh products, increasing store size, increasing their consumer base, developing competitive strategies, adopting self-service, building a low margin-high volume business model, and transforming the store appearance). Goldman (1974a, 1975-1976; & Qin, 1998) thus considered that supermarkets are a specific modern format and that retail modernization may proceed stepwise by developing hybrids incorporating only some features of modern retailing. Retail modernization occurs both at the "retail" and at the "channel" levels (Goldman, 1991). Thus, for the supermarket format to be transferred to emerging countries and for retailing to modernize, environmental factors (international politics, national regulations, adoption of technology (dependent on adequate infrastructure), and competition) as well as channel structure design and consumers' characteristics, behavior, and culture should be taken into account (Goldman, 1981, 1991, 2000).

With the development of retailers' internationalization strategies, Goldman (2000; & Hino, 2005; et al., 2002) built on early retail modernization studies but focused on the factors limiting supermarkets' market share. According to Goldman, supermarket expansion occurs along three dimensions: geographic (larger to smaller cities), socio-economic (high- to low-income consumer segments), and product category-dependent (packaged groceries to fresh products). The last dimension particularly sheds light on consumer culture and how it shapes living and shopping styles.

Culture is central to Goldman's views on retail modernization. He noticed early that lower-income consumers in less-developed or emerging countries will not necessarily patronize supermarkets due to a lack of ability (transportation, refrigeration, familiarity with self-service technologies and large stores), or willingness (attachment to local, small retailers) to do so (Goldman, 1974b, 1981). Goldman (1982, 2000; & Hino, 2005; et al., 2002) then theorized the phenomenon of selective adoption to address the fact that some consumers partially adopt modern retailing formats but continue to shop for fresh or perishable products at traditional stores. With other classic determinants such as accessibility and evaluation of stores' attributes, and to the contrary of socio-economic variables (discussed below), consumer culture influences shopping patterns and evaluations of stores' offerings such that it explains why certain consumers prefer shopping for fresh products at traditional stores (Goldman & Hino, 2005). However, culture even more subtly influences supermarkets' development, as in the case of Shanghai: Goldman

proposes that part of Chinese culture is the societal valuation of retailing activities. Entrepreneurs there have received retail modernization favorably, benefitting from financial and managerial resources and government support, becoming part of the process and contributing to the emergence of national modern retailers. Consequently, modern retailing was not associated with globalizing foreigners' influences, which facilitated its acceptance by Chinese consumers (Goldman, 2000).

Since Goldman's death, scholars have built on his work, adopting perspectives and approaches more focused on the role of consumers. These contributions have inter alia explored the determinants of retail adoption as well as selective adoption patterns and switching behaviors in developing country contexts, offering both theoretical and empirical contributions (e.g., Hino, 2014, 2015; Maruyama & Wu, 2014).

Reardon's Perspective: Supermarket Revolution in Developing Countries

The development economics literature on supermarketization, specifically Reardon's work that appeared from the 2000s, attributes the rapid diffusion of supermarkets in developing countries to foreign direct investment (itself fostered by economic liberalization) and domestic private investment, privatization of retail parastatals, rising incomes, urbanization, and procurement system changes. Multinational firms pursuing profitable foreign direct investment in less developed markets at least initially drove supermarketization. Reardon et al. (2007) argue that international retailers considering demand and market institutional and organizational conditions as endogenous have developed strategies that enable their rapid growth. Supermarkets have then developed proactive strategies to improve entry and growth conditions via procurement system modernization and local supply chain development, reducing costs and gaining competitiveness with traditional retailers. In addition, domestic policies have favored supermarkets (tax incentives) over wet markets (hygiene and location regulations).

Per this research perspective, diffusion of supermarkets coincided with consolidation and multi-nationalization of the food retail sector (Thomas Reardon *et al.*, 2009). Accordingly, Timmer (2009) considers supermarketization as a manifestation of globalization and structural transformation, and the combined result of forces including globalization, urbanization, and knowledge-based technology.

In a comparative study, Reardon and Swinnen (2004) observe that supermarkets tend to start in upper-income niches in large cities and then spread into middle-class and eventually poorer consumer markets; from large cities to secondary cities to towns; and from richer, more urbanized zones or countries to poorer, less urbanized areas. This diffusion pattern is mirrored in the "waves" of supermarket spread seen across developing countries (Reardon et al., 2007).

Reardon's work is largely based on empirical observations and lacks a conceptual model for generalizing results or predicting supermarkets' evolution. However, Lu and Reardon (2018) developed a conceptual approach of the spread of supermarkets that could be applied in developed and developing countries. Using the well-established "continuum of goods" model, they build a conceptual framework of market equilibrium of store type existence, types of products, and degree of variety of product portfolio carried at different stores. Their resulting econometric model reduces the drivers of supermarkets' evolution to two major factors: (1) consumer characteristics such as income, tastes, and costs of travel to different stores and/or shipping costs if purchasing online; and (2) stores' cost structures, which include item costs from upstream producers, the costs of procurement supply chains (beyond item cost) for perishable

items, and in-store storage costs. This model seeks to show under which conditions the different retail types exist, which can become dominant, and which types of goods are distributed by which type of retailer. This approach, based on the rationality of consumers and retailers, allows predictions of the consumer's willingness to frequent one or more types of stores. This conceptualization work, which reduces the complexity of the retailing expansion to a two-factor model, is probably suitable for forecasting the evolution of supermarkets, but distinct from marketing approaches that view the store as a place for sharing and that offer services to enable consumers to achieve their goals.

A Comparison of Perspectives on Retail Evolution within the Cultural Approach to the Big Middle Framework

In their treatment of supermarketization, both the retailing literature (represented by Goldman) and the development economics literature (represented by Reardon) have many common elements. These commonalities and some points of distinction are elaborated in this section.

First, Goldman and Reardon share a critical look at retail and distribution evolution, noting their potentially positive impacts on food systems with consideration for risks of exclusion of the urban (for Goldman, lower-income consumers and traditional retailers) and the rural (for Reardon, smaller producers) poor.

Second, Goldman (1981) and Reardon (et al.2003) propose to analyze supermarket diffusion and adoption through the framework of supply and demand of services. This framework is consistent with the WoR premise that retailers compete on the basis of their offerings and business models. Goldman and Reardon also emphasize the importance of fresh product categories' development in supermarkets' diffusion, although it simultaneously presents the greatest challenges for supermarkets to organize in emerging and less-developed countries.

Third, they share a conception of the process of supermarkets' expansion from bigger to smaller cities and from higher- to lower-income consumers. This process would be consistent with a trickle-down movement, through which innovative retailers optimize their processes and trivialize their offerings to conquer the Big Middle. Evidence from the developing world including MENA has indeed challenged the applicability of the WoR trading-up approach in lower-income economies. Though these studies focused on (supermarkets') technology transfer rather than on endogenous retail innovations, they have shed light and documented the trickle-down effect (Brown, 1991). Here, the main difference between the authors is that Reardon analyses the contemporary, rapid transformations of food systems while Goldman highlights the barriers that slow retail's evolution. Rather than a difference of point of view, this probably results from the period their respective data cover (Gorton et al., 2011). This allows Goldman (1974a, 1975-1976; & Qin1998) to scrutinize endogenous transformations of retailing and to document the existence of hybrid retailing formats, which the Big Middle theory posits as resulting from trading-up or trickle-down effects.

Fourth, both research streams highlight that supermarket diffusion cannot be studied without consideration of upstream marketing and distribution channels and the environment (demand, supply, institutional, competitive, technological) in which retailers operate. This point of convergence invites us to better delineate the two schools of research on supermarketization.

Major differences between Goldman's and Reardon's perspectives concern the interrelationships between supermarket diffusion and its environment. Goldman was sensitive to the cultural embeddedness of retailing activities (adaptation to their environment), while Reardon emphasizes how retailers engage in actions to shape food systems (adaptation of their environment). Such different considerations are salient as soon as supply and demand sides of the environment are taken into account.

On the supply or channel dimension, Goldman (1991) considered that some channels' structures are culturally entrenched, thus that supermarkets may have to comply with those channels and develop other strategies than those pursued in Western countries. This view echoes Arnould's (1995: p. 110) observation that, "Channels' relations are culturally particular responses to certain types of persistent environmental duress." Conversely, Reardon et al. (2007; 2003) emphasize the proactive role of internationalizing big box retailers in shaping upstream markets to build their tailored procurement systems. This point echoes Brown et al.'s (2005) warning that retailers must master their supply chain if they are to survive and succeed in the Big Middle. Indeed, in less-developed and emerging countries, Arnould (1995: p. 121) invites researchers to study "phenomena of personalism as well as those of linkage between economic, institutional, and cultural context in marketplace relationships." Institutions are not immutable and retailers and other distributors pursue efforts to maintain or disrupt the intermediating institution(s), with the aim to shape their supply chains, position themselves within those networks, and keep playing a role in the market (Michel et al., 2019). Hischman's (1981) thoughts on retailers seeking to influence the production landscape to accommodate their own internal constraints and serve their assortment strategies, in turn warn us about the agency effects of retailers on popular culture: What happens upstream between business actors shapes the retail landscape and the cultural resources that are proposed to consumers.

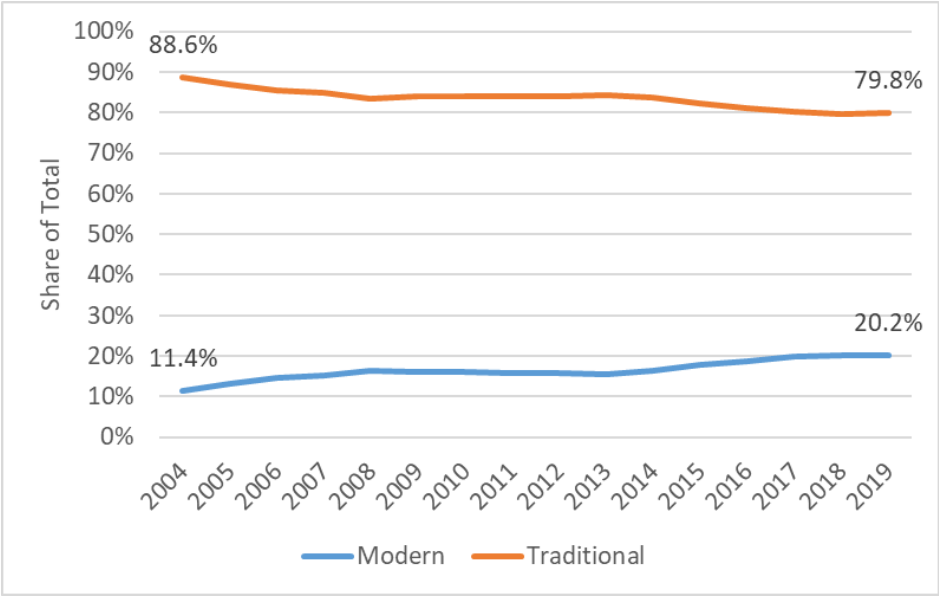
As for demand, Goldman's (2000; and Hino2005; et al.2002) consideration of consumer culture and sub-cultures seeks to understand barriers to supermarket diffusion once geographical and socio-economic gaps are filled. His work on selective adoption phenomena illustrates the different meanings of food categories and the way consumers procure these products. Consistent with CCT, his last publication (Goldman & Hino, 2005) highlights the cultural diversity of people living in the same country and is a first step in understanding how consumption subcultures influence "what makes retail cultural resources valuable, and how and when their value to consumers changes" (Arnould, 2005: 94). Thus, the meanings of retail formats and their offerings, the cultural resources they provide, and the way consumers are willing or able to animate them or not, should be considered to understand better the barriers to supermarket expansion.

Findings and Discussion: Supermarketization in Lebanon

Traditional vs Modern Formats

Historical analysis shows increases in modern and traditional food retail sales in Lebanon in recent decades, but not the definitive replacement of traditional by modern food retail. The modern and traditional food retail segments grew at an average annual rate of 8.8% and 4.0% from 2004 to 2019, respectively. The traditional segment still dominates the food retail market, accounting for 80% of total food retail sales in 2019 (Figure 1) (Euromonitor International, 2019) and 96% of the total number of registered food retailers as of 2015 (Bahn & Abebe, 2017).

Figure 1. Traditional and Modern Retailers' Shares of Total Food Retail Sales



Source: Euromonitor International (2019)

The progression of modern food retail in Lebanon aligns with several of the propositions of Goldman and Reardon as elaborated above. For example, Lebanon's food retail sector features endogenous modern retailers and international modern retailers. As Goldman might have predicted, the national chains Bou Khalil and Le Charcutier Aoun emerged from smaller, family-owned grocery stores to open multiple outlets with a store format that resembles Western supermarket chains. The national chain Al Fakhani may be an example of Goldman's hybrid retailer, exhibiting some features of a modern retailer (availability of multiple food categories, multiple outlets) but not all (formats are smaller than typical supermarkets with limited selection). Simultaneously, international chains including Spinneys, TSC, Monoprix, and Carrefour have entered the market. Interestingly, national or international ownership does not appear to (uniquely) determine success in the market: Recent supermarket failures and withdrawal from the market include both endogenous (Bou Khalil) and international (TSC) chains. The questions of (international) retailer strategy, performance, and divestment remain underexplored themes in Lebanon as well as the broader retailing literature (Alexander & Doherty, 2010).

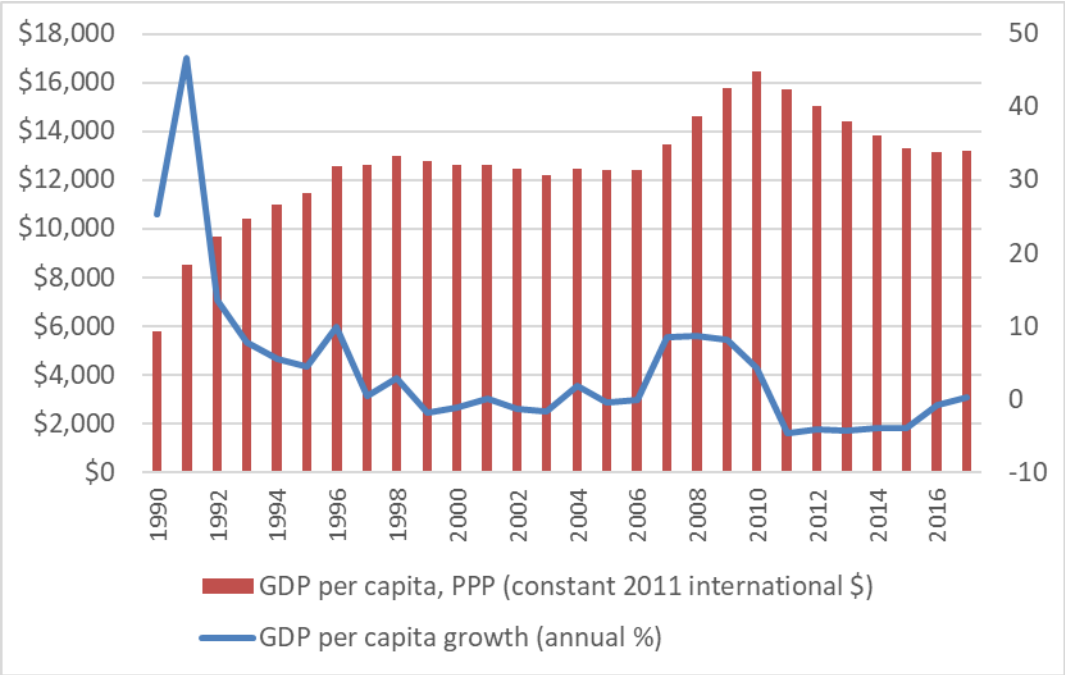
Socio-Economic, Geographic, and Product Category Expansion

The evolution of modern retail in Lebanon appears to be consistent with the socio-economic or income-dependent pathway proposed by Goldman (2000) and Reardon et al. (2007). Modern retailers have captured only 20% of all food retail sales, which is consistent with a small niche market composed of upper- and middle-income consumers.[8] The socio-economic pathway expansion is further supported by the analysis of Bahn and Abebe (2017), who found that supermarkets were less likely than traditional food retailers to be located in districts reporting higher rates of poverty. In addition, the modest gains of

[8] Lebanon is among the most income unequal countries in the world (Assouad, 2019). Azzi (2019, June 2) estimates the Lebanese rich at 0.3% of the population and the middle class at 13% of the population.

modern food retailers roughly reflect moderate income growth performance in the country: Per capita gross domestic product, a proxy for income, has more than doubled since the end of the Lebanese civil war in 1990, but declined over the period 2010-2017 (Figure 2). According to the main retailers' project of extension, we can thus see a trickle-down movement of their offers to reach the Big Middle and expand their market share. For example, Spinneys, one of the leading food retailers in Lebanon, recently introduced discount stores under its Happy brand. Indeed, Spinneys executives argue that the structural trend is for all markets to modernize because of the benefits that mass-market retailing can bring to consumers (Rahhal & Schellen, 2018 January 16). Unfortunately for modern retailers operating in Lebanon, the Big Middle (as defined by income) is not very big.

Figure 2. Gross Domestic Product Per Capita in Lebanon



Source: World Bank (2019b)

Conversely, modern food retailers' performance shows mixed adherence to the geographic expansion pathway. Indeed, as Goldman and Reardon would predict, modern food retailers initially located in Lebanon's larger cities (Beirut, Saida, Tripoli), with some extension to smaller cities and towns: For example, Spinneys operates in major coastal cities, while the national Al Makhazen/Coop chain operates 42 outlets including in interior cities in the Bekaa Valley. Statistical analysis shows that supermarkets were less likely than traditional food retailers to locate in governorates and districts with a more rural population (Bahn & Abebe, 2017). However, there is no compelling evidence that rising urbanization is driving supermarketization in Lebanon, as Reardon might have predicted: Lebanon is highly urbanized, with 89% of the population living in urban areas as of 2018 (World Bank, 2019b). The slow but steady increase in the country's urbanization rate of only 2.1 percentage points since 2004 (World Bank, 2019b)

implies no clear force driving a doubling in modern retailers' market share over the same period. The geographic explanation of modern retail expansion is thus less convincing in the case of Lebanon.

Lebanon's record of supermarket expansion provides limited evidence for the product category-dependent expansion path predicted by Goldman. Available data on urban Lebanese adults' food consumption by level of food processing indicate that 73% of total caloric intake comes from processed foods, while 27% comes from minimally processed or fresh products (Table I) (Nasreddine et al., 2018); neither time-series data nor data on the relative contribution of these categories of food to the average basket by cost are available. Modern retailers' 20% market share is below the relative contribution even of ultra-processed foods to urban adults' consumption. Assuming that modern retailers dominate food categories in stepwise fashion, this suggests that traditional retailers still account for a significant share of processed food sales; and that supermarkets have room for further expansion through the penetration of processed or packaged foods, before pursuing minimally processed or fresh food categories. More realistically, those consumers who shop at modern retailers probably purchase a larger share of their food baskets there, while other consumers do not frequent them at all – even to purchase the processed goods in which they may initially specialize. This hypothesis is supported by anecdotal observation, as supermarkets display and sell a range of perishable food products including fresh fruits and vegetables; as well as survey results indicating Lebanese households generally but not universally prefer to purchase fresh products from traditional retailers including greengrocers (fruits and vegetables) and butchers (meat) (refer to Article No. 2). Consumers' shopping behavior therefore appears to fit the Goldman phenomenon of selective adoption, as observed in other developing countries (Hino, 2015). The exact reasons for the preference of traditional retailers for perishable foods are as-yet unknown. For example, the traditional formats might create emotional connection with customers or offer specialty foods suitable for the Mediterranean diet.

Table 2. Percentage Contribution to Total Energy Intake of Various Food Groups among Adult Population in Beirut, Lebanon

Food Group	**Contribution to Total Energy Intake** (% total)
Minimally processed foods	**27.10%**
Processed culinary ingredients	**12.25%**
Processed foods	**23.83%**
Ultra-processed foods	**36.53%**

Source: Nasreddine *et al.* (2018)

Lebanon's experience in which smaller and traditional retail formats continue to dominate food retail is not unique, but rather consistent with other developing countries where small food retail formats have persisted or even outperformed large grocery stores, particularly among lower-income segments (e.g., Child et al., 2015; D'Andrea et al., 2006; Nandonde & Kuada, 2016). Moreover, the continued strong presence of medium- and small-size grocery stores appears to be consistent with consumers' stepwise transition from traditional to modern food markets as predicted by Reardon (Lu & Reardon, 2018),

reinforcing that (at least some) Lebanese consumers are in the midst of the transition and selecting across store types.

Institutional Environment and Cultural Factors

The continued dominance of traditional food retailers in Lebanon – despite high levels of urbanization, upper-middle income status at the national level, and consumption patterns that favor processed foods – demands an exploration of the potential barriers to modern food retail expansion as emphasized by Goldman. For example, environmental factors are plausible barriers to supermarketization in Lebanon, specifically national regulations, competition, and infrastructure. Seyfert et al. (2014) point to the institutional landscape to explain modern retail's low penetration rate in the country. The business enabling environment is weak: Lebanon ranks 143 among 190 countries according to the Doing Business Index (World Bank, 2019a). Businesses complain of pervasive corruption (Le Borgne & Jacobs, 2016) with the country ranked 137 of 180 on the Corruption Perceptions Index 2019 (Transparency International, 2020). This environment may plausibly have differential effects on smaller or informal businesses (e.g., greengrocers) as compared to larger, more visible, and formal businesses (e.g., supermarkets). Monopolistic control of import channels, including a legal framework that allows a single agent to exclusively control the import of selected food products (Le Borgne & Jacobs, 2016), drives prices higher. The extent to which such anti-competitive behaviors affect product lines, and the ability of smaller versus larger food retailers to negotiate better terms and prices, remains an area for further exploration. Moreover, weak infrastructure plausibly limits the growth of modern food retail. The poor quality of utility and transportation infrastructure in Lebanon – ranking 89 of 141 countries (World Economic Forum, 2019) – increases the costs of operation for all businesses. Electricity must be purchased from the grid and independent generators to offset insufficient power supply (Le Borgne & Jacobs, 2016). The country's small physical size and short distances between productive agricultural areas, warehouses, and retail locations should limit transportation costs; however, the potential difference in costs borne by traditional versus modern retailers is unclear. Manufacturers of imported products reportedly force local distributors to deliver to smaller outlets, raising the costs charged to larger retailers ("Supermarket: 20 years since Spinneys' return," 2016, July 18).

Whether channel structure design facilitates or slows supermarketization in Lebanon is unclear. The limited size and productive capacity of the domestic agri-food sector may constrain modern food retailers' ability to develop robust local supply chains, even for products that can be competitively produced in the country. As of 2016, for example, Spinneys relied both on the existing wholesale markets and direct purchases from farmers to source fruits and vegetables ("Supermarket: 20 years since Spinneys' return," 2016, July 18). Elsewhere, Spinneys announced in 2018 plans to shift from third-party logistics providers to self-owned and -operated warehouses and distribution infrastructure (Rahhal & Schellen, 2018 January 16). Whether other modern retailers have improved or consolidated their procurement systems to gain an advantage over traditional retailers is unknown.

Finally, there is limited evidence available to assess whether the Lebanese case aligns with a cultural explanation of supermarketization (or barriers to it). Within MENA, evidence shows that cultural factors may facilitate or inhibit the spread of supermarkets. For example, Codron et al. (2004) cite cultural factors as a barrier to supermarkets' expansion in Turkey and Morocco. Religiosity, demand for trusted halal

foods, and an emphasis on freshness and meal preparation within Arab culture may favor traditional markets (Hino, 2010; 2015). Muslim Arab consumers' religiosity and demand for halal foods lead them to favor traditional over modern format retail markets, while major Israeli supermarket chains target secular consumers (Heiman et al., 2019). Conversely, Libyan cultural prohibitions on women's movement within traditional markets, paired with supermarkets' safe, clean, and less crowded environment, has led women to feel more comfortable shopping in supermarkets and promoted their diffusion in Libya (Sehib et al., 2013). Amine and Lazzaoui (2011) find that Moroccan consumers frequent modern food retailers as symbolic destinations for social interaction, offering social classification to middle- and high-income shoppers while enhancing self-image for lower-income shoppers. Preliminary survey evidence from Lebanon indicates that consumers consider factors such as trust, additional services offered (e.g., informal provision of credit), and convenience (e.g., delivery or parking availability) when selecting a retailer (refer to Article No. 2). Whether the medium- and small-size grocery stores that dominate Lebanese food retail better suit the food shopping culture and preferences of most consumers, and whether or how modern food retailers may adapt their offer to compete with traditional formats, require further exploration.

The outlook for supermarketization in Lebanon is perversely interesting given a series of adverse shocks to the country since 2019. Lebanon experienced a popular uprising beginning in October 2019, leading to the resignation of successive governments and political instability. The local currency has depreciated from its longstanding peg to the U.S. dollar, contributing to consumer price inflation in excess of 130% between October 2019 and October 2020 (441% for food and non-alcoholic beverages) (Central Administration of Statistics, 2020a). Government policies to subsidize and control food prices have further distorted the market. Informal capital controls progressively applied since late 2019 have constrained personal and business financial transactions. COVID-19 exacerbated these pressures, including via lockdowns and trade disruptions, which anecdotal evidence suggests may have disproportionately affected more visible, modern food retailers versus smaller retailers serving poorer communities (Domat, 2021, February 1). In sum, Lebanon's economy was projected to contract by 25% in 2020 (International Monetary Fund, 2020), with more than 20% of the population in extreme poverty (UNESCWA, 2020, August 19). The implications of these combined shocks for food retail transformation are undoubtedly profound. It remains to be seen whether modern retailers (specifically foreign retailers) will retreat in search of more stable market opportunities, or persist to gain market share despite macroeconomic crisis (Maumbe & Chikoko, 2020); and whether this moment of popular upheaval will lead not only to political transformation but also of the food retail landscape. Indeed, this last question is particularly relevant if the ideology conveyed by (modern) retailers diverges from the moral and social values sought by the Big Middle of Lebanese consumers; or if the current crises trigger changes in societal values, and whether (and how) retailers reposition themselves in relation to the values they offer.

Conclusion

The main contribution of this article is to identify and review existing theories of supermarketization, and to consider whether these explain the process of supermarketization in Lebanon. Major contributions from Goldman and Reardon offer different perspectives, with important commonalities that indicate a degree of convergence across academic disciplines (marketing and development economics, respectively). Goldman and Reardon both appeal for a critical look at the impacts of retail distribution,

with emphasis on exclusion of the poor. Accordingly, the impacts of modern food retail in Lebanon – such as the quality and affordability of food offered to consumers who can enter the system, versus those who cannot – merits further attention. Next, both Goldman and Reardon view the diffusion and adoption of modern food retail through a framework of supply and demand of services, and there is nothing to indicate that this framework does not hold in Lebanon. Their predicted patterns of supermarket expansion generally abide in Lebanon, though in several instances the lack of detailed data impedes their definitive acceptance or rejection. Goldman's emphasis on the barriers to supermarketization seems particularly relevant in the Lebanese case, highlighting the need to explore further retailers' operating environment and consumers' food shopping preferences. Regarding their final commonality, the Lebanese case is consistent with their argument of the importance of considering upstream marketing and distribution channels and the environment in which modern food retail takes root. Concerning the differences between Goldman and Reardon, the simultaneous presence of endogenous and international retailers in Lebanon indicates that endogenous retailers have adapted to an internationally informed market, as Goldman predicts; and that international retailers are navigating the Lebanese system, as Reardon expects. The current landscape is not an either-or proposition. Finally, Goldman's proposition that culture informs consumer behaviors beyond a single taste parameter resonates in the Lebanese case, even though modern retailers have not yet closed either the geographical or the socio-economic gaps: Available evidence points to as-yet unexplained factors underpinning the selective adoption of modern food retail.

In summary, existing theories go some way to explain the process of supermarketization in Lebanon, which is in the early stages in terms of geographic, socio-economic, and product category expansion. Further expansion of modern food retail in Lebanon may proceed in line with the patterns predicted by those theories, with implications for actors within the supply chain as well as consumers. At what pace this transition might unfold, and if/when Lebanon will shift from early- to more advanced states of supermarketization, call for a more comprehensive approach. We show in this article that an approach that accounts for the institutional environment and socio-cultural factors better explains the process of supermarketization in developing countries.

In practical terms, understanding the extent of supermarket penetration, the path of its progression in line with established expansion patterns, and deviations from those patterns can help modern retailers to understand the potential for further growth in the (Lebanese) market and to refine their market strategies to current institutional and socio-cultural realities. This research approaches the emerging paradigm of critical food studies, which explores complex relationships, processes, and arrangements that affect – and are affected by – food systems at local, regional, and global levels (Koç et al., 2016). This study also approaches other works on food as a means of learning, pedagogy, and empowerment of consumers to be agents of their own consumption and co-creators of the future of the planet (Sumner, 2015), and seeks to offer a useful teaching tool as it succinctly presents leading theoretical frameworks of supermarketization and an atypical country case to test their applicability.

This analysis points to further research exploring the process and drivers of supermarketization in Lebanon. These inquiries should elaborate on the perspectives of Goldman and Reardon for application in a developing country context to increase their explanatory and predictive power. Further investigation of the Lebanese case could usefully explore how institutions and culture inform the supermarketization

process. For example, research is needed to test propositions of CCT in the Lebanese context through the use of qualitative and quantitative consumer data that speaks to gaps in the literature, notably the role of consumers in studies of supermarket sector growth (Slack et al., 2020). In particular, analysis of the role of consumer behavior within the evolution of retail should serve to explain how consumers engage with the retail landscape rather than how they influence it (Arnould, 2005). Such research could explore the role of consumers not only as passive recipients of the offer of food retailers, but agents capable of informing and shaping the food landscape and system.

Finally, incremental improvements to this theoretical work may contribute to a better understanding of retail markets' evolution in developing countries, and advance our common knowledge of its relationship with and effects on the wider food system, food security, and food sustainability. This research stops short of exploring the effects of food retail transformation in Lebanon, though such research is needed and can ideally serve to inform industry strategies on the part of food producers and competing retailers, as well as consider longer-term implications for consumers and policy makers.

Food Retailing and Supermarketization in Lebanon: Shopping Behaviors among Leading-Edge Consumers

Abstract

Background: Supermarketization is rapidly transforming food retail in developing countries. A range of factors has been proposed to explain this transformation spanning supply-side and demand-side factors, including evolving consumer characteristics, shopping behaviors, and attitudes to food retail. The academic literature has shown that more urban, higher-income consumers are the consumer segment to initiate and drive the supermarketization process in developing countries.

Research Contribution: The case of Lebanon is interesting as a (formerly) upper-middle income country that nevertheless lagged behind in its rate of supermarket penetration. This research explores food-shopping behaviors among the urban, higher-income consumer segment that should have been expected to drive supermarketization forward, to determine the extent to which they have adopted supermarkets and the factors driving or delaying this transition. The novelty of this research is its detailed exploration of food shopping patterns and the supermarketization process in an under-studied context, Lebanon. This research contributes additional empirical evidence to the wider assessment of supermarketization in developing countries, including those of the Middle East and North Africa (MENA) region. This research also has potential to serve as a baseline for comparison in assessing shifts in consumer behavior that may result from recent, extensive, and overlapping crises that have occurred in Lebanon.

Methodology: This research builds on a survey of more than 200 Lebanese consumers, drawn primarily from an urban, higher-income consumer segment. Survey responses were subject to quantitative analysis.

Results: The consumers surveyed have adopted supermarkets selectively, exhibiting cross-shopping behaviors: They typically bought non-perishable foods from supermarkets and grocery stores and perishable goods (fresh fruits and vegetables, meat, fish, and baked goods) from traditional retailers. Demographic characteristics and retailer-related attributes correlated with where consumers shopped, and which foods they purchased from different retailer types. Retailer location and travel time are significantly associated with consumers' choice of retailer. Lebanese consumers prioritized food quality, range of products, store location, and reputation when choosing where to purchase food. Consumers assessed supermarkets favorably as compared to traditional retailers with regard to range of products, store reputation, availability of specialty products, and prices. This research provides evidence that even the leading edge of Lebanese consumers have yet to abandon traditional food retail formats, and that the Lebanese market remains far from a complete food retail transformation.

Introduction

The transformation of food retail from traditional towards modern formats such as supermarket chains – a phenomenon termed supermarketization – has been observed globally and within developing countries (Qaim, 2017; Traill, 2006). Academic literature has explored cross-country patterns of supermarketization in developing countries (e.g., Bahn & Abebe, 2020; Dries et al., 2004) as well as case studies that examine the extent and reality of supermarketization in a given country context (e.g., Asfaw, 2008; Rischke et al., 2015). This topic continues to be a focus of academic research given the significant implications of supermarketization for food systems and the actors therein, including traditional retailers (Atkin et al., 2018), supply chain actors such as small farmers (Thomas Reardon *et al.*, 2009), the local labor force (Neven et al., 2009), and the consumers who may be affected by changes in the qualities, quantities, prices, and seasonality of food available on the market (Atkin et al., 2018; Chege et al., 2015; Dawson, 2013; Demmler et al., 2018; Kimenju et al., 2015; Wanyama et al., 2019).

The literature exploring the pace and drivers of supermarketization reveals agreement on several key points. Two predominant research strands share a common view of food retail transformation as a function of supply and demand of services (Gorton et al., 2011). The growth of supermarkets is therefore attributed to a range of factors including supply-side shifts within the distribution and retailing sectors as well as demand-side shifts in consumer preferences and attitudes (e.g., Reardon et al., 2007; Reardon et al., 2003). Additionally, the academic research has identified the phased entry and domination of supermarkets including across geographic and socio-economic market segments (Goldman, 2000; Goldman & Hino, 2005; Goldman et al., 2002; Reardon & Swinnen, 2004). More recently, research has identified the need for further exploration of the process and drivers of supermarketization in developing countries, with a particular emphasis on the role of consumers as agents who inform and shape the food retail landscape (Fuentes & Hagberg, 2013; Paul et al., 2016).

The case of Lebanon is an interesting one to explore the process and drivers of supermarketization, and the role of consumers therein. Available headline figures suggest that modern food retail penetration has been slower than expected given Lebanon's (previously) upper-middle income status and its highly urban population distribution (Bahn & Abebe, 2017; Seyfert et al., 2014). Are these headline figures reflected in consumer behaviors, specifically among the leading edge of urban, higher-income consumers who have driven the growth of supermarkets elsewhere? Will supermarkets dominate the market in time, or is there something fundamental delaying their adoption by Lebanese consumers? This paper contributes to the academic research by assessing the extent to which supermarkets have captured the market in a developing country context. This research applies a customer-centric model, a quantitative approach, and primary survey data to assess the extent and drivers of supermarketization by focusing on Lebanese consumers and their food retailing behaviors and preferences. Moreover, this study has particular value given its unique context: This research provides a historical view into the food shopping behaviors of Lebanese consumers, which is valuable in light of recent shocks (political, economic, and public health) affecting Lebanon that are expected to have a significant effect on the country's food system. By offering a pre-crisis baseline, this research can help future researchers to understand how such crises may have affected food retail in the country.

This article is structured as follows: A literature review briefly presents the main strands of the academic literature on the process and drivers of supermarketization. Next, we note the study context and methodology underpinning this study. The results and discussion follow. Conclusions conclude.

Literature Review: Food Retail Transformation

The academic literature on supermarketization in developing countries draws on two predominant research strands, the first associated with marketing/retailing scholar Goldman and the second associated with Reardon's work rooted in development economics (Gorton et al., 2011). These strands concur on key points, viewing the process of supermarketization as a function of supply and demand dynamics and identifying phases of modern retail entry and dominance in developing countries; but varying in their emphasis of cultural context and consumer preferences within food retail transformation.

Both of the leading perspectives on supermarketization in developing countries view supermarket diffusion and adoption as a combined function of supply and demand of services (Goldman, 1981; Reardon et al., 2003), consistent with an objective to dominate the (food retail) market (Gorton et al., 2011). Modern-format retailers compete not only amongst each other, but also with smaller, traditional retailers that may actively pursue functional and business strategies focused on price or service to sustain their competitive advantages (Ramakrishnan, 2010).

Phases of Food Retail Transformation

Both the key strands of the academic literature conceive of supermarketization in developing countries as a phased expansion according to geography and income or purchasing power. Reardon observes that supermarkets tend to start in upper-income niches in large cities and spread into middle-class and eventually poorer consumer markets; to extend from large cities to secondary cities to towns; and to reach from richer, more urbanized zones or countries to poorer, less urbanized areas (Reardon et al., 2007; Reardon & Swinnen, 2004). Goldman refines these observations, noting that supermarket expansion occurs along three dimensions: geographic (larger to smaller cities), socio-economic (high- to low-income consumer segments), and product category-dependent (packaged groceries to fresh products) (Goldman, 2000; Goldman & Hino, 2005; Goldman et al., 2002). Goldman's final observation is consistent with the selective adoption of supermarkets by consumers who may continue to shop for fresh or perishable products at traditional retailers (Goldman, 1982; Goldman & Hino, 2005; Goldman et al., 2002), and raising a significant challenge for supermarkets seeking to dominate the market in developing countries. These observations on the phased penetration of supermarkets are consistent with evidence that rapid growth of supermarkets is followed by slower growth amidst a concentration of retailers' sales and market power (Dawson, 2013).

Emphasis on Consumers within Food Retail Transformation

A point of distinction in the major strands of the supermarketization literature is one of emphasis: Goldman's earlier works stress the slow pace and barriers to food retail transformation, with a focus on the role of consumer culture; while Reardon's more recent works observer a faster pace of change in developing countries driven by international food system actors. For Goldman (1975-1976, 1991; & Qin, 1998), whose studies of retail dynamics were largely conducted in the 1970s through the late 1990s and drew heavily on the Middle East and North Africa (MENA), retail modernization in developing countries

does not necessarily follow the same path or adopt the same features as in Western countries. Indeed, Goldman's work tends to emphasize the barriers that inhibit or slow retail modernization in less developed country contexts. Conversely, in his generally later works, Reardon attributes an accelerating pace of supermarketization in developing countries to a combination of factors including increased investment (particularly foreign direct investment), privatization of retail parastatals, rising incomes, urbanization, and procurement system changes (Dries et al., 2004; Reardon et al., 2007). Reardon argues that international retailers initially drove supermarketization, by developing growth strategies suited to local market and institutional conditions before working to re-shape procurement systems and develop supply chains to their advantage over traditional retailers (Reardon et al., 2007). In sum, while Goldman emphasizes the cultural embeddedness of retailing activities (adaptation of retailers to their environment), Reardon highlights retailers' actions to shape food systems (adaptation of their environment by retailers).

Consistent with this distinction in emphasis, Goldman gives more elaborate treatment to consumer culture to explain supermarket diffusion beyond the geographic or socio-economic levels, and to explain selective adoption across food categories (Goldman & Hino, 2005; Goldman et al., 2002). Subsequent research has built on Goldman's work, with a focus on the role of consumers regarding the determinants of retail adoption, selective adoption patterns, and switching behaviors in developing country contexts (Hino, 2010; Hino, 2014, 2015; Hino, 2020; Hino & Levy, 2016; Maruyama & Wu, 2014).

Customer-Centric Conceptions of Food Retailing

Various models exist to describe and assess food retail markets and the supermarketization process, many structured to reflect supply and demand dynamics. Lu and Reardon (2018), for example, propose an econometric model that reduces the drivers of supermarkets' evolution to stores' cost structures and consumer characteristics (including income, tastes, and costs of travel to different stores). Other models emphasize the consumer or demand side to understand retail choice and the longer-term implications for retail dominance (Schoenbachler & Gordon, 2002). Gorton et al. (2011) develop a customer-centric model of the food retail sector in which consumers choose to purchase their food from among multiple retailers, based on the expected utility that would result from their purchase. Expected utility depends on the value that the retailer offers to the customer, according to the customer's desired attributes; the importance of each attribute may differ. According to Gorton et al. (2011), therefore, it is necessary to understand the relevant attributes, the relative importance or weighting of each attribute, and the extent to which different retail formats satisfy these attributes for their customers. Commonly applied attributes of interest include price and quality of products, the range or array of products offered, store location or proximity to customers, store image or reputation, and others including customers' demographic characteristics (Pan & Zinkhan, 2006).[9] Such models of retailing, often rooted in micro-economics, tend to view consumers as "rational, autonomous, self-interested, calculative agents" and overlook the socio-cultural dimension of retailing (Fuentes & Hagberg, 2013: 291).

[9] Evidence on the direction and strength of relationships between such characteristics and retail choice, varies according to study context and methodology (Pan & Zinkhan, 2006).

Existing research on consumer choice in (food) retailing, and the most relevant attributes for consumers, largely draws on developed or Western markets (Gorton et al., 2011; Paul et al., 2016). Though a growing number of studies have explored food retail evolution and consumer preferences in the MENA region (e.g., Amine & Hendaoui Ben Tanfous, 2012; Belwal & Belwal, 2014; Codron et al., 2004; Hino, 2010; Hino, 2015; Sehib et al., 2013), few publications address this topic in context of Lebanon (e.g., Chammas & Yehya, 2020).

Methodology

This study offers a descriptive analysis of the food retailing behaviors of food consumers resident in Lebanon, drawing on an original, primary dataset. Per the predictions of the work of Goldman and Reardon, the focus is on the leading-edge consumers expected to drive the adoption of supermarkets in a developing country.

Study Context

Lebanon is a Middle Eastern country located along the Mediterranean Sea, bordered by Syria to the north and east and Israel to the south. The country is small in terms of geography (10,254 km2) and population (approximately 6 million residents, of which 4 million Lebanese, as of 2016). Lebanon's population is highly urban: In 2016, 88% of the population resided in urban areas (World Bank, 2022b) and roughly half of the population lives in or around the capital and largest city, Beirut (Bahn & Abebe, 2017).

Lebanon was classified as an upper middle income country on the basis of per capita GDP, which stood at more than $15,500 per capita (PPP, current international $) as of 2016 (World Bank, 2022b). The country's economic position has since collapsed due to concurrent crises (World Bank, 2021, June 1).

Modern-format retail emerged Lebanon after the country's civil war (1975-1990). Supermarkets and hypermarkets, including international chains, entered the market in competition with domestic retailers. The concept of the discount store was introduced to Lebanon in late 2014, when the Happy discount grocery store chain launched in the country (Freifer, 2014 September 15). Modern format retailers accounted for only 19% of total grocery retail sales in Lebanon as of 2016, whereas traditional format retailers accounted for 81%. By comparison, modern format retailers accounted for 30% of total grocery retail sales across the Middle East and Africa in the same year. However, modern format grocery retailers' sales grew faster than those of traditional format grocery retailers over the period 2012-2016 (6.3% growth vs. 2.0% growth). Moreover, modern format grocery retailers increased both the number of outlets and physical selling space over the period 2012-2016, whereas these both decreased by approximately 15% across traditional format grocery retailers during the same period (Euromonitor International, 2022).

Primary Data – Collection and Analysis

Primary data were collected via a survey focused on consumers' use of distinct retail formats, including supermarkets, and the identification of relevant retail outlet attributes and other determinants of shopping behavior. Development of the survey instrument began with the retail outlet attributes as identified by Reardon et al. (2003), to which additional attributes considered to be relevant were incorporated (Bahn & Abebe, 2017). The survey questionnaire consisted of multiple sections spanning socio-economic and demographic information and the use of different retail formats (including frequency

and expenditures). The survey questionnaire also addressed the retail attributes preferred by consumers as measured on a five-point Likert scale (1 = not at important, 5 = very important), and respondents' views on supermarkets in comparison to other retail outlets with respect to each attribute, again using a five-point Likert scale (1 = strongly unfavorable, 5 = strongly favorable). English and Arabic language versions of the questionnaire were produced.

The sample has been constructed to reach leading edge supermarket consumers. Adult individuals (aged 18+) residing in Lebanon and who held some or all responsibility for food shopping within their household were eligible to participate in the survey. The survey questionnaire was administered through an electronic platform between May and August 2016. Respondents were contacted electronically to participate in the survey, via direct email contact and via public posts to social media platforms (Facebook). This contact method was selected as a rapid and cost-effective means to reach a large number of respondents. However, only individuals with electronic access in the form of email addresses and/or Facebook accounts were directly contacted. This survey methodology likely introduced selection bias, such that the respondents do not accurately reflect the total population resident in Lebanon; online surveys are less likely to reach poorer households, vulnerable groups such as informal workers, and women (Atamanov et al., 2020, June 24). Responses are not considered as representative of the entire population residing in Lebanon in light of this limitation.

The primary survey data set consists of 209 individual responses collected via electronic questionnaire. Quantitative data analysis has been completed using Stata SE 15.0. Results have been calculated as frequencies (categorical variables) and means (continuous variables). Appropriate tests including Pearson's chi-square and Fisher's exact test have been performed to determine statistical significance of associations within the data.

Results and Discussion

Respondent Profile

Characteristics of the survey population in comparison to the Lebanese national population are presented as Supplemental Material (see **Table 11**). The distribution of respondents by age skews younger than the general population, which may be a result of reliance on electronic platforms for survey administration. The survey population has a significantly higher proportion of female respondents, which could reflect the traditional role of women in household food shopping and preparation as compared to men.

The respondent profile corresponds to the expected characteristics of leading-edge consumers, reflecting a more urban and higher-income level than the national population. Survey respondents are drawn more heavily from Beirut than the general population, and are less rural than the general population. More than half of respondents reside in Beirut or the Mount Lebanon governorate located in close proximity to Beirut. Concerning the socio-economic conditions of their households and the communities in which they live, a majority of households reported total income exceeding $2,000 per month. While exactly comparable household income data are not available, the survey population self-report monthly incomes that skew significantly toward higher income brackets than the general population (Central Administration of Statistics et al., 2020). Respondents indicate that the level of education in their immediate communities is relatively high with 72% reporting that their adult neighbors have on average a university or technical education and another 15% reporting a high school education. These figures

exceed comparable national figures, as only 21.4% of the labor force had a university or technical education while 15.5% had a secondary education (Central Administration of Statistics, n.d.-b). This discrepancy reinforces the presumption that the survey respondents are drawn from more educated segments of society and do not accurately reflect the wider population of Lebanon.

Consumer Behaviors: Frequented Retailers and Food Shopping Patterns

Survey respondents purchase food across various types of retailers including modern-format retailers (supermarket, discount store) and traditional-format retailers (grocery store, greengrocer, open market, farmers' market, butcher, fish market, and bakery) (**Table 3**). Survey respondents overwhelmingly shop at supermarkets as the primary source for at least a single food category. Similarly, more than half of respondents shop at specialty retailers including butchers, greengrocers, and bakeries. A small share of respondents purchase food from open markets,[10] farmers' markets, or discount stores that recently entered the Lebanese market.

Table 3. Food Retailers Frequented by Survey Respondents

Retailer Type	**Number**	**%**
Supermarket	204	97.6%
Butcher	135	64.6%
Greengrocer	128	61.2%
Bakery	123	58.8%
Fishmonger	87	41.6%
Grocery (*dekkane*)	85	40.7%
Open Market (*souk*)	16	7.7%
Farmers' Market	15	7.2%
Discount Store	4	1.9%
Own Production	1	0.5%

Source: Survey Data

Statistical analysis shows no difference in the likelihood of male and female respondents to shop at supermarkets (results not shown).

The majority of respondents (n=196 or 93.8%) shop across multiple types of retailers. This result is interpreted as strong evidence of intertype cross-shopping – crossing between different retail format types (Hansen, 2003) – in Lebanon, in line with evidence reported in other developing countries including in the MENA region (Hino, 2014; Hino, 2020; Hino & Levy, 2016). This is also generally consistent with the finding of Vroegrijk et al. (2013) that the entry of new modern retail formats, specifically discount stores, can induce cross-shopping among a small proportion of consumers. Those respondents who rely on a single type of retailer, tend to conduct all of their shopping at supermarkets (n=12), potentially signaling rising prominence in the Lebanese market.

[10] A national-level study similarly reported that only 17% of consumers purchased food from open markets as of late 2020 (Hoteit *et al.*, 2021).

Table 4 reports the type of retailer from which survey respondents primarily purchase different categories of food. Significant differences are revealed across food categories. Traditional retail outlets account for the majority of purchases of fresh products including fruit, vegetables, and meat, and nearly half of all fish purchases. Traditional markets in the form of standalone bakeries are a primary source of baked goods, which are an important component of the Lebanese diet: Bread alone comprises nearly 20% of adults' daily energy intake (Nasreddine et al., 2019). Supermarkets are the primary source of dairy products, frozen foods, canned goods, dry goods, and snack foods. The general divide between fresh and non-perishable foods follows the general finding within the literature around supermarketization (Humphrey, 2007), and the predictions of product-based adoption of supermarkets (Goldman et al., 2002; Reardon et al., 2007). Even among this relatively urban and well-to-do survey population, supermarkets have yet to conquer all product categories, which is consistent with the modern food retailers' lack of dominance in retail grocery sales in Lebanon (Euromonitor International, 2022).

Table 4. Primary Food Retailer per Food Product Category

	Food Product Category [11]									
Retailer Type	**Fruit**	**Vegetables**	**Dairy Products**	**Meat**	**Fish**	**Baked Goods**	**Frozen Goods**	**Canned Goods**	**Dry Goods**	**Snack Foods**
Supermarket	29.2	24.4	74.2	29.7	41.6	30.1	90.9	85.2	79.0	65.6
Butcher	-	-	-	64.6	-	-	-	-	-	-
Greengrocer	53.1	57.9	-	-	-	-	-	-	0.5	-
Bakery	-	-	1.9	-	-	57.9	-	-	-	2.4
Fishmonger	-	-	-	-	41.6	-	-	-	-	-
Grocery (*dekkane*)	6.2	5.7	21.1	1.9	1.9	10.1	3.4	9.1	12.9	23.0
Open Market (*souk*)	5.3	5.3	-	-	1.0	-	0.5	-	0.5	-
Farmers' Market	4.3	5.7	-	-	-	-	-	-	0.5	-
Discount Store	0.5	0.5	0.5	-	-	-	-	0.5	1.0	0.5
Own Production	0.5	-	-	-	-	-	-	-	-	-
Other	1.0	0.5	2.4	1.4	5.3	1.9	-	-	4.8	3.4
Do not know	-	-	-	-	1.4	-	-	-	0.5	0.5
Do not consume	-	-	-	2.4	7.2	-	5.3	5.3	0.5	4.8
Total	100	100	100	100	100	100	100	100	100	100

Source: Survey Data

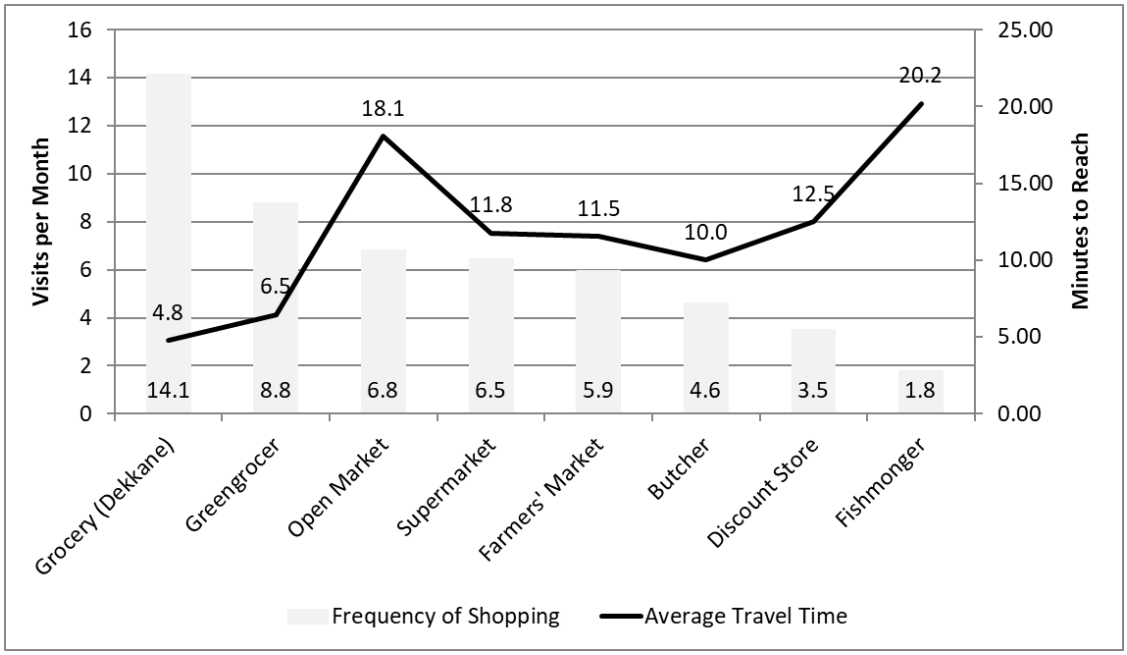
Survey respondents reported the frequency with which they shop at food retailers (**Figure 3**). The most frequent visits were reported at the grocery store, with an average of 14 visits per month or roughly once every two days (among those who shop at grocery stores). Visits to other types of stores were less

[11] Figures are the share of respondents sourcing the product category per retailer type. Figures are read vertically, and may not sum exactly to 100 due to rounding.

frequent, e.g., respondents who shopped at supermarkets did so approximately once every five days. The greater frequency of visits to grocery stores is unsurprising, as grocery stores function as corner stores and offer convenience within proximity to households.

The average travel time to food retailers is generally inverse with the frequency of visits: Lower travel times tend to be reported for retailers that are more frequently visited (**Figure 3**), which is consistent with the literature (Lu & Reardon, 2018) and specifically the law of retail gravitation (Pan & Zinkhan, 2006). On average, survey respondents travel the least (greatest) amount of time to reach a grocery store (fishmonger). The smaller travel time to a grocery store or greengrocer reinforces the understanding that these are neighborhood or local food retailers.

Figure 3. Frequency of Food Shopping and Travel Times by Food Retailer Type



Source: Survey Data

Consumer Behaviors: Food Expenditure Patterns

Data on food expenditure is similarly analyzed to understand the concentration of food purchasing behavior across food retailer types. Survey respondents reported the relative share of total food expenditures (excluding restaurants) over the previous month, according to the type of food retailer where food was purchased. Survey respondents typically spend no more than 40% of all food expenditures at any single type of food retail outlet (**Table 11**), reflecting that most respondents spread their food expenditures across multiple types of food retailers. Exceptionally, supermarket shoppers reported spending a relatively higher share of their total food expenditures at supermarkets.[12] The expenditure

[12] Among those respondents who frequent supermarkets, respondents spent approximately 42% of their total food expenditure at supermarkets (shares calculated as weighted average, assuming mid-point per expenditure band; excludes 0% and "Do Not Know" answers). Comparable figures are 41% for discount stores, 27% for farmers' markets, 26% for grocery stores, and 23% for greengrocers.

distribution for those shopping at discount stores is also notably skewed, however, caution is needed in interpreting this result due to the low number of respondents shopping at this type of store (n=4). This provides some evidence that shoppers frequenting modern format food retailers more intensively concentrate food purchases.

Table 5. Relative Food Expenditures by Food Retailer Type

	Share of Expenditures [13]											
Retailer Type	**0-10%**	**11-20%**	**21-30%**	**31-40%**	**41-50%**	**51-60%**	**61-70%**	**71-80%**	**81-90%**	**91-100%**	**Do Not Know**	**Total**
Fishmonger	66.7	16.1	6.9	2.3	2.3	1.2	-	-	-	-	4.6	100
Open Market (*souk*)	37.5	25.0	6.3	18.8	-	-	6.3	-	-	-	6.3	100
Butcher	30.4	29.6	15.6	8.9	2.2	3.0	2.2	-	2.2	-	5.9	100
Greengrocer	25.8	28.9	20.3	5.5	4.7	3.9	0.8	3.9	0.8	-	5.5	100
Grocery (*dekkane*)	25.8	20.0	11.8	17.7	4.7	3.5	3.5	1.2	1.2	1.2	9.4	100
Farmers' Market	20.0	20.0	6.7	20.0	-	-	13.3	-	-	-	20.0	100
Supermarket	8.3	13.2	16.7	13.2	10.8	10.8	4.9	8.8	6.9	1.5	4.9	100
Discount Store	-	25.0	25.0	25.0	-	-	-	-	25.0	-	-	100

Source: Survey Data

To assess changes over time, survey respondents indicated whether and how the relative share of expenditures spent in different types of food retail outlets has changed as compared to five years before. Possible responses were restricted to increased, decreased, or no change. The largest increase in relative expenditures was reported for supermarkets, with 60% of respondents who shopped at supermarkets indicating that the relative share had increased over the preceding five years. Similarly, nearly 60% of greengrocer shoppers indicated that they were spending relatively more of their food budget at greengrocers. Conversely, 27% of grocery store shoppers reported that the relative share of food expenditures at grocery stores had declined in the preceding five years (**Table 6**). Taken together, this offers anecdotal evidence of supermarket penetration at the expense of other retailers such as grocery stores.

[13] Figures are the share of respondents reporting the approximate expenditure share per retailer type. Figures are read horizontally, and may not sum exactly to 100 due to rounding.

Table 6. Relative Change in Food Expenditures by Food Retailer Type

	Change in Expenditures [14]				
Retailer Type	**Increased**	**No Change**	**Decreased**	**Do Not Know**	**Total**
Supermarket	60.3	21.1	13.2	5.4	100
Greengrocer	57.9	26.6	10.9	4.7	100
Farmers' Market	53.3	26.7	13.3	6.7	100
Grocery (*dekkane*)	49.4	18.8	27.1	4.7	100
Butcher	45.2	37.8	13.3	3.7	100
Open Market (*souk*)	37.5	50.0	6.3	6.3	100
Fishmonger	27.6	43.7	23.0	5.8	100
Discount Store	25.0	-	50.0	25.0	100

Source: Survey Data

Consumer Preferences: Determinant Factors in Selecting among Food Retailers

Survey respondents reported their perceived importance of retailers' attributes in choosing where to buy food (1 = not important at all, 5 = very important). **Table 7** presents these results, with the attributes ranked by the mean score in order from most important to least important. The most important attributes were the quality of products, range of products available, store location, store reputation, and food safety standards.[15] Price of products, availability of specialty products, and store loyalty programs were relatively less important to respondents. Survey respondents did not consider any of the attributes to be unimportant (no average score below 3). These results are generally consistent with those reported elsewhere in the literature, including case studies from other developing country contexts (e.g., Gorton et al., 2011), though notably price was less important as a product-related factor in determining retailer choice than reported in earlier studies (Pan & Zinkhan, 2006). The ability of consumers to favor other factors over price has likely been reduced in Lebanon's current economic crisis context, which might be expected to raise the importance of economic capacity as a factor informing shopper behavior (Gilboa & Mitchell, 2020).

Results have been analyzed to identify systematic variation in the importance of attributes across segments of the survey population. While in most cases there is no discernible pattern in preferences across sub-groups (results not shown), in several instances statistically significant relationships have been identified. For example, we assessed the perceived importance of food retailer attributes across household income levels (**Table 7**). The highest income households place the greatest importance on the quality of products, and this result is statistically significant. Lower income households perceive the store location to be less important in choosing where to shop, as compared to higher income households. Surprisingly, however, household income levels are not statistically significantly associated with the

[14] Figures are the share of respondents reporting the change in food expenditure per retailer type. Figures are read horizontally, and may not sum exactly to 100 due to rounding.

[15] The accuracy of consumers' perception of food safety is unclear without objective measures (*e.g.*, pesticide residues, chemical contamination, microbial contamination) or a close association with reliable visual and physical cues (Wu *et al.*, 2021). An avenue for future research may be to validate these perceptions.

perceived importance of price in choosing where to shop for food, whereas we might have expected to find higher importance on price among lower-income households, which presumably face higher budgetary pressures.

Table 7. Perceived Importance of Retailer Attributes – Respondent Average and by Household Income Level

Attribute	Importance Rating per Attribute [16]						Fisher's Exact Test Result [17]
	All [18]	Income Category					
		$0-500	$501-1000	$1,001-2,000	$2,000-4000	$4,001+	
Quality of products	4.789 ***	5.000	4.714	4.684	4.690	4.883	***
Range of products available	4.349 ***	4.000	4.429	4.316	4.345	4.362	
Store location	4.325 ***	4.000	3.286	4.289	4.379	4.372	**
Store reputation	4.288 ***	4.000	4.429	4.184	4.155	4.415	
Food safety standards	4.212 ***	3.000	4.714	4.316	4.298	4.096	
Price of products	4.019 ***	3.000	3.857	4.132	4.190	3.872	
Availability of specialty products	3.493 ***	5.000	3.429	3.105	3.466	3.649	
Store loyalty program	3.252 ***	3.000	2.500	3.342	3.211	3.245	

Source: Survey Data

[16] Mean scores are calculated across substantive responses (excluding "do not know").

[17] Statistical test used to confirm whether the difference in favorability scores is statistically significant. * 10% ** 5% *** 1% level of significance.

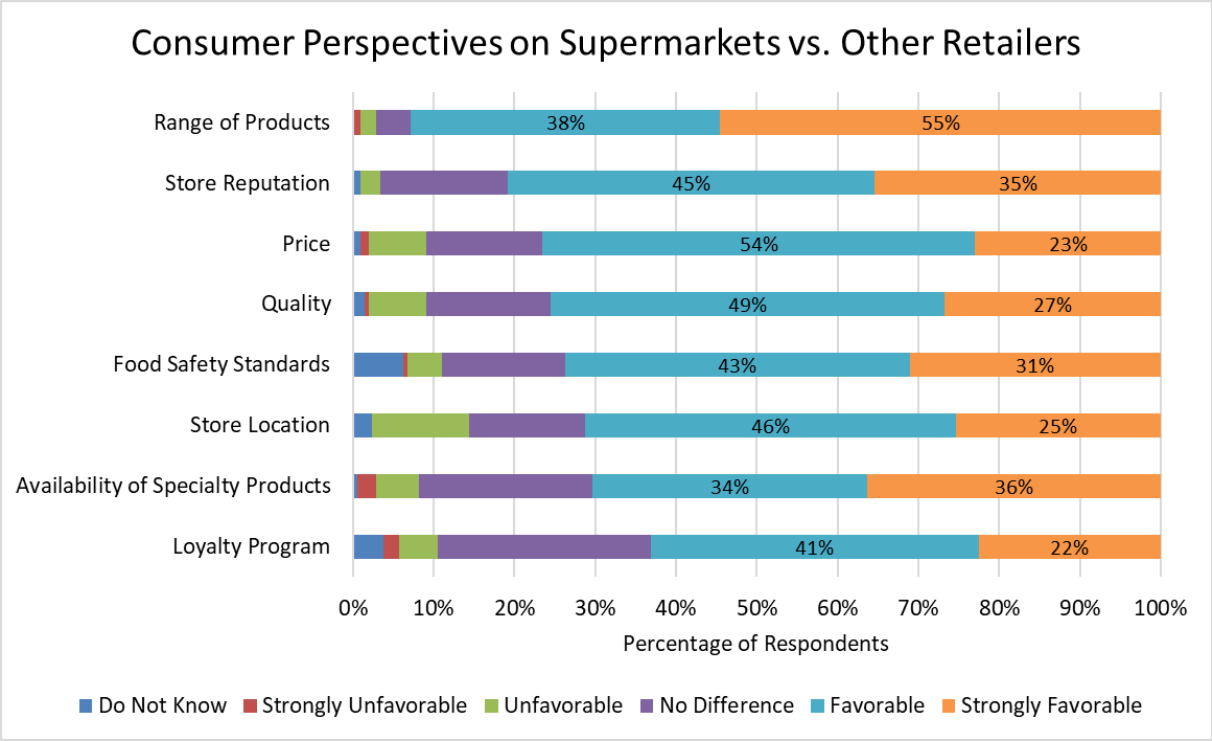
[18] A *t*-test is used to confirm whether a mean importance score is statistically different from a neutral score (= 3). * 10% ** 5% *** 1% level of significance.

The perceived importance of food retailer attributes does not differ significantly between supermarket shoppers and non-supermarket shoppers with few exceptions (see Supplemental Material - **Table 12**). Supermarket shoppers consider the availability of specialty products to be more important in choosing where to buy food than non-supermarket shoppers. Supermarket shoppers rate the price of products as more important in choosing where to shop than do non-supermarket shoppers; this result provides weak evidence that supermarkets are not offering a high-price offer to the Lebanese market, or presumably, shoppers more concerned with prices would not choose to shop at supermarkets.

Consumer Preferences: Comparison of Supermarkets to Other Food Retailers

Figure 4 presents respondents' assessment of supermarkets as compared to other food retail formats across a range of attributes. A majority of respondents views supermarkets favorably (favorable or very favorable) as compared to other food retail formats, and this result holds across all attributes. Notably, more than three-quarters of survey respondents indicate that they believe supermarkets are favorable or strongly favorable in terms of range of products (93%), store reputation (81%), price (77%), and quality (76%).

Figure 4. Consumer Perspectives on Supermarkets vs. Other Retailers



Source: Survey Data

Table 8 presents a quantitative analysis of survey respondents' perception of supermarkets in comparison to other food retail outlets (1 = very unfavorable, 5 = very favorable) across a range of retailer attributes. Consistent with **Figure 4**, **Table 8** shows that supermarkets performed better on all attributes (mean exceeding 3.0); these results were statistically significant for all attributes. The highest mean scores were

reported for the attributes of range of products available, store reputation, and food safety standards. The last attribute is generally consistent with supply-side evidence from other developing countries that modern food retailers have prioritized food safety certifications in selecting suppliers (Nandonde & Kuada, 2018). Overall, the perception that supermarkets offer advantages in terms of quality, convenience, and price should predict their ability to capture market share within the survey population and more broadly in Lebanon.

Table 8. Favorability of Supermarkets per Retailer Attribute

	Favorability score of supermarkets per attribute [19]			**Fisher's exact test result [20]**
	All [21]	**Supermarket Shoppers**	**Non-Supermarket Shoppers**	
Range of products available	4.435 ***	4.446	4.000	*
Store reputation	4.150 ***	4.158	3.800	**
Food safety standards	4.061 ***	4.079	3.400	**
Availability of specialty products	3.971 ***	3.985	3.400	**
Quality of products	3.956 ***	3.985	2.800	***
Price of products	3.913 ***	3.936	1.581	**
Store location	3.868 ***	3.874	3.600	
Store loyalty program	3.801 ***	3.816	3.200	*

Source: Survey Data

We also compare the perceived favorability of supermarkets across respondents who shop at supermarkets, versus shoppers who do not (**Table 8**). Unsurprisingly, supermarket shoppers report higher favorability scores across every attribute; the differences in scores are statistically significant across every attribute except for store location. This finding is consistent with existing research, which finds a significant positive relationship between consumer attitudes and shopping intentions (Rodrigo et al., 2019). More revealing may be the results reported by non-supermarket shoppers (albeit based on a very limited number of responses (n=5)), which suggest that some customers choose not to shop at supermarkets despite their perceived advantage in terms of product range, reputation, and other factors. Non-supermarket shoppers report that supermarkets perform unfavorably as compared to other food retail formats with regards to quality and prices of products. This result provides preliminary evidence as to areas for which supermarkets could improve their perception or performance to gain market share, or alternatively where traditional retailers could press their advantage to retain their customer base: the quality and price of products.

A small number of survey respondents reported that supermarkets compared favorably to other food retail outlets in terms of some "other" factor. Survey respondents reported these via free response to

[19] Mean scores are calculated across substantive responses (excluding "do not know").

[20] Statistical test used to confirm whether the difference in supermarket shoppers' and non-supermarket shoppers' favorability scores is statistically significant. * 10% ** 5% *** 1% level of significance.

[21] A *t*-test is used to confirm whether a favorable score is statistically different from a neutral score (= 3). * 10% ** 5% *** 1% level of significance.

include the availability of parking (n=3), cleanliness or neatness (n=3), one-stop shopping (n=3), customer service (n=3), spaciousness (n=2), a lack of long lines (n=1), and availability of continuous electricity including for air conditioning (n=1).

Supermarkets versus Other Food Retail Outlets – Demographic Comparisons

Next, we analyze variation in perceptions of supermarkets (in comparison to other food retailers) across socio-demographic factors. Statistical tests reveal very few systematic differences across groups of survey respondents. For example, considering gender, analysis shows that the perceptions of survey respondents did not vary significantly whether the respondent is male or female (see Supplemental Material - **Table 13**). However, survey respondents living in households with children under the age of 18 reported a more favorable perspective of supermarkets with regard to availability of specialty products as compared to households without children.[22]

Turning to household income level, we find that store location is the only attribute for which customers' perceptions differ significantly, with middle-income households viewing supermarkets slightly more favorably than either higher or particularly lower-income households (**Table 9**). This general lack of significance accords with previous research by Goldman and Hino (2005), which found no impact of socio-economic factors on shopping behavior across formats.

Table 9. Favorability of Supermarkets per Attribute, by Household Income Level

	Favorability score of supermarkets per attribute [23]					**Fisher's exact test result [24]**
	$0-500	**$501-1000**	**$1,001-2,000**	**$2,000-4000**	**$4,001+**	
Range of products available	4.000	4.571	4.289	4.569	4.394	
Store reputation	3.000	4.143	4.316	4.138	4.130	
Food safety standards	-	4.286	4.053	4.111	4.034	
Availability of specialty products	4.000	4.000	3.684	4.034	3.989	
Quality of products	2.000	3.857	4.158	3.965	3.902	
Price of products	-	4.286	4.000	3.862	3.914	
Store location	2.000	3.714	4.029	3.776	3.913	**
Store loyalty program	4.000	3.500	3.622	3.893	3.824	

Source: Survey Data

This relatively homogenized view of supermarkets suggests that retailers' attempts to influence leading-edge consumers' perceptions of supermarkets (or other food retail formats) could broadly target food shoppers without distinction or targeting across those socio-demographic factors considered here.

[22] Mean scores were 3.991 and 3.947, respectively; Fisher's exact test (p=0.065).
[23] Mean scores are calculated across substantive responses (excluding "do not know").
[24] Statistical test used to confirm whether the difference in favorability scores is statistically significant. * 10% ** 5% *** 1% level of significance.

Supermarket Perception Weighted by Importance

Finally, cross-analysis is used to assess the perceived favorability of supermarkets, in light of the relative importance of the attributes (**Table 10**). How do supermarkets perform on those factors of greatest importance to leading-edge consumers? A simple cross-multiplication exercise demonstrates that supermarkets are well perceived with regards to quality of products, which is the most important factor for survey respondents in choosing a food retailer. Similarly, supermarkets perform particularly well with respect to the range of products available, which is the second most important factor for survey respondents in choosing a food retailer. The relatively weaker perception of supermarkets with regard to store loyalty programs might initially appear problematic for them; however, this factor is the least important according to survey respondents.

These results suggest that supermarkets in Lebanon have taken a customer-centric approach to retailing, which should foster market success (Gorton et al., 2011). Indeed, the survey respondents' strongly positive views of supermarkets point to scope for supermarkets' continued growth within the Lebanese food retail market – at least among consumers who care about these attributes. However, in light of Lebanon's current crises and its widespread impacts on both consumers and the food system, additional research is needed to assess whether these attitudes have shifted in recent years, necessitating alternative approaches to remain customer-centric.

Table 10. Cross-Analysis of Retailer Attributes and Supermarket Favorability

Attribute	Importance rating	Favorability score of supermarkets [25]	Cross Score
Quality of products	4.79	3.956	18.949
Range of products available	4.35	4.435	19.292
Store location	4.33	3.868	16.748
Store reputation	4.29	4.150	17.804
Food safety standards	4.21	4.061	17.097
Price of products	4.02	3.913	15.730
Availability of specialty products	3.49	3.971	13.859
Store loyalty program	3.25	3.801	12.353

Source: Survey Data

Conclusion

In conclusion, this research has found evidence of supermarketization in Lebanon, though not yet a definitive domination of the market, among a survey population that should be the leading edge of supermarket adoption. This is broadly consistent with earlier research that found the pace of supermarketization in Lebanon to lag behind that in other developing countries including in the MENA region (Seyfert et al., 2014). Moreover, Lebanese consumers surveyed demonstrated selective adoption of food retail formats, buying non-perishable foods from supermarkets and grocery stores and perishable

[25] Mean scores are calculated across substantive responses (excluding "do not know").

goods (fresh fruits and vegetables, meat, fish, and baked goods) from traditional retailers, consistent with earlier studies of cross-shopping behaviors. Demographic characteristics and retailer-related attributes correlated with where consumers shopped, and which foods they purchased at different retailers. Retailer location and travel time are inversely associated, as expected, and appear to jointly inform consumers' choice of retailer. In explaining their food shopping behaviors, Lebanese consumers prioritize food quality, range of products, store location, and reputation when choosing where to purchase food. Consumers assessed supermarkets favorably as compared to traditional retailers with regard to range of products, store reputation, availability of specialty products, and – perhaps surprisingly – prices.

Theoretical Implications: This article makes two major contributions to the literature. First, through a new empirical dataset and detailed exploration of food shopping patterns in an under-studied context – Lebanon – this research contributes to the wider assessment of supermarketization in developing countries, including those of the MENA region. A second theoretical contribution of this article is that it unites a macro-level approach drawn from the economic development literature with micro-level studies of consumer behavior (e.g., studies exploring a single explanatory factor, studies exploring preferences or intention to shop between two different retailers) and shows how they can be consistent. Within the retail literature, research to understand retail format choice has often focused on the role and interaction of consumers' socio-demographic characteristics and shopping orientations (e.g., Amine & Lazzaoui, 2011) with retailer-related factors and attributes (e.g., Maruyama & Wu, 2014), including micro-level exploration via developed and emerging economy case studies (Hai Tran & Sirieix, 2020). The current article focuses on a distinct country case study to explore consumers' socio-demographic characteristics and shopping preferences vis-à-vis shopping behaviors across broad categories of food retail. This research aligns with earlier findings of marketing scholars, whose work from emerging markets has demonstrated the importance of, for example, product assortment, relative price, and perceived value as well as store image in consumers' food purchase behaviors (Diallo, 2012; Grosso et al., 2018) – even if it does not follow exactly the same methodologies or scale of analysis.

Managerial Implications: This study is also relevant to retail managers. The results indicate that supermarkets' perceived offer aligns well with the preferences of consumers surveyed, suggesting that there is (or was, prior to Lebanon's overlapping crises) continued scope for supermarkets to continue their penetration of this (urban, higher-income) market segment. Nevertheless, supermarkets have been unable to fully penetrate the market as even vanguard consumers continue to frequent traditional retailers particularly for perishable products, highlighting the importance of this product segment for retail managers and the possibility to benchmark the quality of their offer to that of traditional retailers (De Silva Kanakaratne et al., 2020). For traditional retail managers, they may continue to resist the emergence of modern retail by focusing on functional strategy aspects (Ramakrishnan, 2010), particularly those that align with consumers' more important points of distinction in selecting a food retailer.

Study Limitations and Orientations for Future Research: This study points to several important areas for further exploration. The major strands of research on supermarketization in developing country contexts concur that the more urban, wealthier population underpinning this research study is more likely to be at the vanguard of supermarket adoption, and thus of particular interest as modern and traditional retailers compete to dominate the market. Nevertheless, these consumers continue to rely on traditional retailers

to provide their fresh foods. Further research is needed to investigate the reasons for the apparent mismatch between consumers' stated preferences and favorable views of supermarkets, and their continued reliance on traditional retailers for fresh foods. Indeed, the socio-cultural aspect of food shopping has been neglected in the retail literature (Hai Tran & Sirieix, 2020) and requires a clearer understanding of retailers' offers and how these meet the preferences of consumers, informing their choices among different retailers. Qualitative approaches rooted in socio-cultural frameworks such as Consumer Culture Theory or a socio-cultural reading of the Big Middle framework may be well suited to explore this seeming contradiction, and the ways in which retail exchange differs from the predictions of (especially economically-rooted) models (Arnould, 2005; Fuentes & Hagberg, 2013).

Further extensions of this work could be taken to address methodological limitations in the current study. This study builds on survey respondents' self-declared behavioral and preferential data, rather than direct observation of shopping behaviors, which may be subject to response bias issues due to common motive or social desirability. Future research could compare survey data with real behavioral data, for example via sales receipts. In addition, while this research assessed key factors that have been shown to inform consumer food shopping behaviors, it is not exhaustive. An in-depth, qualitative investigation of the cultural dimensions of shopping could provide insight as to additional factors to include in future research.

Finally, further research could also extend the questions explored here, across population segments and over time. Though this research focuses on a population segment of particular interest, the findings may not prove applicable to the wider Lebanese population. A useful extension to this research is to widen the population surveyed in order to verify whether the behaviors, preferences, and perceptions of Lebanon's more rural and lower income segments are significantly different from the consumers surveyed in this study. Expanding this quantitative analysis to the wider population would thereby provide additional insight into the extent of supermarketization in Lebanon. Separately, this study offers a view on consumer behaviors and preferences prior to the onset of multiple crises affecting Lebanon since 2019, which have reshaped the country and its food system. Results such as the lower importance of price in determining retailer choice among the relatively well-to-do consumers surveyed in pre-crisis Lebanon may not hold in a context of economic collapse and hyperinflation. Accordingly, additional research is needed to explore the evolution of consumer demographics, behaviors, and attitudes in light of crisis, and whether any changes therein may have implications for the supermarketization process in Lebanon.

Ethical Statement

The authors declare no known conflict of interest. The research protocol received the required approval of the American University of Beirut Institutional Review Board.

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Supplemental Material

Table 11. Sample Characteristics and Comparison with Population of Lebanon

	Survey Population		National Population
	Number	**%**	**%**
Age [26]			
Between 18 and 20 years old	12	5.7%	*N/A*
Between 21 and 24 years old	26	12.4%	13.5%
Between 25 and 34 years old	56	26.8%	21.4%
Between 35 and 44 years old	52	24.9%	17.4%
Between 45 and 54 years old	41	19.6%	17.2%
55 years and above	22	10.5%	30.5%
Gender [27]			
Female	160	76.6%	49.7%
Male	49	23.4%	50.3%
Location [28]			
Beirut	112	53.6%	7.1%
Mount Lebanon	73	34.9%	42.0%
Other	24	11.5%	51.0%
Urban-Rural [29]			
Urban	198	94.7%	88.3%
Rural	7	3.4%	11.7%
No response	4	1.9%	*N/A*
Total Monthly Household Income [30]			
US$ 0-500	1	0.5%	17.9%
US$ 501-1,000	7	3.4%	24.6%
US$ 1,001-2,000	38	18.2%	41.0%
US$ 2,001-4,000	58	27.8%	9.8%
US$ 4,001 +	94	45.0%	6.2%
No response	11	5.3%	*N/A*
Education Level of Community [31]			
Primary education	3	1.4%	25.7%
Secondary education	31	14.8%	15.5%

[26] Authors' calculations from national-level data for 2018 for total resident population aged 21 and above (data for ages 18-20 are not available) (Central Administration of Statistics, n.d.-a).

[27] National-level data for 2016 (World Bank, 2022b).

[28] Authors' calculations from national-level data for 2018 (Central Administration of Statistics, n.d.-a).

[29] National-level data for 2016 (World Bank, 2022b).

[30] National-level data for 2018 present a monthly household income distribution using alternative thresholds, as follows: <$433 (17.9%), $433-$800 (24.6%), $800-$1,600 (29.7%), $1,600-$2,133 (11.3%), $2,133-$3,333 (9.8%), and >$3,333 (6.2%) (Central Administration of Statistics *et al.*, 2020).

[31] National-level data for 2018 for total resident population aged 3 and above, corresponding to "elementary," "secondary," and "university and above" (Central Administration of Statistics, n.d.-b).

	Survey Population		National Population
	Number	%	%
University or technical education	150	71.8%	21.4%
No response	25	12.0%	*N/A*

Table 12. Perceived Importance of Retailer Attributes by Supermarket and Non-Supermarket Shoppers

Attribute	Importance rating per attribute			Fisher's exact test result [32]
	All [33]	Supermarket Shoppers	Non-Supermarket Shoppers	
Quality of products	4.789 ***	4.799	4.400	
Range of products available	4.349 ***	4.363	3.800	
Store location	4.325 ***	4.324	4.400	
Store reputation	4.288 ***	4.300	3.800	
Food safety standards	4.212 ***	4.207	4.400	
Price of products	4.019 ***	4.029	3.600	*
Availability of specialty products	3.493 ***	3.515	2.600	**
Store loyalty program	3.252 ***	3.274	2.400	

Source: Survey Data

Table 13. Favorability of Supermarkets per Attribute, by Gender

	Favorability score of supermarkets per attribute [34]			Fisher's exact test result [35]
	All	Male	Female	
Range of products available	4.435	4.531	4.406	
Store reputation	4.150	4.188	4.138	
Food safety standards	4.061	4.087	4.053	
Availability of specialty products	3.971	4.020	3.956	
Quality of products	3.956	4.204	3.879	
Price of products	3.913	4.104	3.855	
Store location	3.868	3.766	3.898	
Store loyalty program	3.801	3.813	3.797	

Source: Survey Data

[32] Statistical test used to confirm whether the difference in supermarket shoppers' and non-supermarket shoppers' favorability scores is statistically significant. * 10% ** 5% *** 1% level of significance.

[33] A *t*-test is used to confirm whether an importance score is statistically different from a neutral score (= 3). * 10% ** 5% *** 1% level of significance.

[34] Mean scores are calculated across substantive responses (excluding "do not know").

[35] Statistical test used to confirm whether the difference in female and male favorability scores is statistically significant. * 10% ** 5% *** 1% level of significance.

Hybridization of Lebanon's Food Retail Landscape? Observations of Modern Food Retailers' Offer to Consumers

Abstract

Background: The introduction and growth of modern food retailers – termed supermarketization – has transformed food retail environments around the globe, albeit with variation. The non-uniform phenomenon of supermarketization, and questions over the extent to which a supermarket model is imposed or must hybridize to compete within developing countries, raise the need to study unique food retail environments in specific country contexts, including less well documented areas such as the Middle East and North Africa (MENA). The need for greater knowledge of market-based food retailing within developing countries and their contribution to the wider food environment has been identified as a gap in the literature on food environments. Documenting food retail environments as they exist is important to understand longer-term evolution in food retail environments and the role of hybridization of supermarkets as part of that evolution.

Objectives: This research article seeks to establish a deeper understanding of the food retail environment in Lebanon, at a unique moment in time corresponding to the onset of concurrent crises (COVID-19 and economic collapse). An examination of the comparative offer of modern food retailers can offer insights into the commonalities and differences in the supermarket format, and evidence of hybridization of the supermarket within the Lebanese context.

Methodology: A valid approach to assess food retail environments adopts qualitative methods. This article relies on a qualitative investigation employing structured observations of modern format food retailers' outlets as a reflection of their offer to consumers.

Results and Contribution: This article presents a detailed examination of the offer at five modern food retailers to the Lebanese consumer at a specific point in time. Modern retailers show signs of both adaptation to local market demands, as well as actions that shape the market to align with their (international) offer. This article moves beyond the existing quantitative evidence to explore what various food retailers offer to the Lebanese consumer and document a detailed, micro-level view of the food retail landscape in Lebanon. This article also offers a glimpse of how hybridization of the supermarket model takes form within a developing country context.

Keywords: supermarkets; food retail; observation; qualitative methods; hybridization; glocalization; Lebanon

Introduction

> *"Finding out what's on the official record is the easy bit. The bit that takes time is familiarizing yourself with the world picture." – Hilary Mantel (Mantel, 2018)*

The retail landscape is undergoing many changes all around the world with important socio-economic impacts: In the United States and the United Kingdom for example, 'retail apocalypse' refers to the undergoing massive closure of brick-and-mortar stores (Helm et al., 2020) (Helm et al., 2021). Emerging countries are witnessing a phenomenon of supermarketization, referring to the process by which the introduction and growth of modern food retailers – large-format, self-service, chained stores – transforms the food retail environment, displacing traditional food retailers including mom-and-pop grocery stores and specialist retailers like butchers and greengrocers (Reardon et al., 2003). This process has been observed around the globe, and the work of consumer sociologists has made it possible to characterize key changes brought about by the supermarket model of modernity as it swept through western countries: expansion of assortment size and depth leading to an abundance of merchandise (Barthes, 1984); efficiency and replacement of human by nonhuman technology (e.g., self-service or scanning) (Ritzer, 1993); and the multiplication of signs carried by visual elements such as price or promotional displays within a point-of-sale model that has gone so far as to reorganize the way people live and move and shape cities (Baudrillard & Glaser, 1994). Nevertheless, the extent to which the supermarket model is imported and adopted it its entirety, or whether the model hybridizes to succeed in developing country contexts, is another consideration in the research (Goldman, 1974a, 1974b, 1975-1976). Moreover, supermarketization is not uniform across all countries (Tessier et al., 2010), justifying the need to study unique food retail environments in specific country contexts. Indeed, greater knowledge of market-based food retailing within developing countries and their contribution to the wider food environment have been identified as a gap (Turner et al., 2018). These gaps in the academic literature have real-world implications, as a lack of knowledge limits evidence-based decisions by managers, institutional actors, and policymakers (Nandonde & Kuada, 2018). This gap applies to the case of Lebanon.

To understand how a food retail environment evolves, the food retail environment must be documented as it exists. Various approaches are available to do so. Quantitative approaches are widely used, for example to explore the extent and drivers of modern food retail in a given country context (Goldman et al., 2002; Tandon et al., 2011), consumer choice of retail formats (McCordic et al., 2022; Sanchís-Pedregosa & Pennano, 2021), and the impact of supermarketization on food safety in value chains (Alita et al., 2021). Qualitative methods are relatively rare in the field of retail marketing but nevertheless valid (Brown & Dant, 2008), and have been used for example to examine cross-shopping behavior in Vietnam (Hai Tran & Sirieix, 2020). They are particularly relevant to picture the retail landscape (e.g., Badot, 2005; Dholakia et al., 2012) so as to understand the forces that are shaping it. The current article adopts a qualitative approach.

This research article seeks to establish a deeper understanding of the food retail environment in Lebanon, and thereby the supermarketization process within this developing country. It does so by moving beyond the existing quantitative evidence to explore qualitatively the offer of modern format food retailers to the Lebanese consumer. The specific research questions guiding this research are, how do the value

propositions of modern format food retailers present within the Lebanese food environment compare? And does this comparison offer evidence of hybridization of the supermarket format within this developing country context? This article presents the results of a qualitative investigation using structured observations of food retailer outlets to address these research questions, conducted at a unique moment just as Lebanon entered into multiple crises (COVID-19, economic collapse).

This article is presented in five sections. The literature review assembles disparate research traditions to articulate a number of relevant threads on which this article builds: (food) retail transformation and the importance of store environments therein; the intersection of internationalization, glocalization, and hybridization of food retail and the adaptation of store environments; and the definition and characterization of food retail formats, including store environments. The following section presents an original methodology based on direct observation. The third section presents results, and the fourth discusses and critically analyzes those results. The final section presents conclusions, limitations, and opportunities for further research.

Literature Review

The Big Middle and (Food) Retail Transformation

The Big Middle is a leading market-based framework to understand retail evolution, specifically in terms of offerings and cost (Levy et al., 2005). The Big Middle is "the marketspace in which the largest retailers compete in the long run, because there is where the largest number of potential customers reside" (Levy et al., 2005: p. 85). Successful retailers are drawn to the Big Middle in pursuit of economies of scale, higher revenues, and incremental profits. Within this framework, retailers typically enter the market as low-price retailers or as innovators before migrating to the Big Middle: Low-price retailers initially focus on price-oriented market segments, while innovative retailers initially focus on quality-oriented market segments. Of these two archetypal business models, the former "enrich the value proposition to gain in attractiveness" (trading up); the latter "optimize resources and competences to gain in efficiency" (trickle down) (Volle et al., 2008: pp. 135 & 139). Retailers in the Big Middle thereby evolve from their initial niche to a hybrid position offering innovation and low prices and thereby satisfying a mass market or large market segment (Levy et al., 2005).

The Big Middle evolves over time due to intense competition, which drives retailers to maintain their value proposition, often by developing new organizational structures and investing in fixed assets oriented towards a volume-based retail model (Levy et al., 2005). Brown et al. (2005) argue that success in the Big Middle is a function not only of supply chain efficiency and appeal to a range of customers; success within the Big Middle also depends on geographic, technological, and socioeconomic changes to the retail environment.

While the Big Middle framework was conceptualized based on evidence from the United States, specifically the performance of department stores and their competitors (i.e., Wal-Mart) (Levy et al., 2005), it has been successfully applied to other regions and market types, for example analysis of supermarketization in Thailand (Gorton et al., 2011) and of Brazil's apparel sector (Miotto & Parente, 2015).

Beyond Price and Product Assortment: A Socio-Cultural Reading of the Big Middle

A critical, socio-cultural reading of the Big Middle framework argues that retailers provide more than goods and services to consumers; they offer a range of cultural (economic, utopian, ludic, and temporal) resources (Arnould, 2005; Arnould & Thompson, 2005; Badot & Paché, 2005). Through the lens of Consumer Culture Theory (CCT), which views consumption as an inherently communicative and symbolic behavior that creates and expresses meaning (Ger, 1999; Wilk, 1998), "Retailers compete to provide the most compelling array of cultural resources to consumers, not merely lower prices or better assortments" (Arnould, 2005: p. 91).[36] Through their assortment function – which consists of filtering, arranging, promoting (Hirschman & Stampfl, 1980) and influencing producers' offerings and creating their own ones (Hirschman, 1981) – Big Middle retailers forge and shape symbols of popular culture. Assortments are only part of the resources that retailers propose to consumers: Their retailing formats, where people shop and with which people interact, and the symbols they carry are also part of the offering (Arnould, 2005). In his description of the historical evolution of supermarket formats, Goldman (1975-1976) explicitly highlights the importance of the store shopping environment as "their main competitive tool against other supermarkets" (60). The store environment does not only have intrinsic value, but also provides customers with informational cues to infer the products, services, and prices offered by the retailer (Grewal et al., 2003). The importance of store environments as a factor attracting middle-income consumers to modern food retailers has been validated in developing country contexts (Sehib et al., 2013).

According to this perspective, evolution within the retail space is not the result of firm competition but rather is a result of changes in the combination of cultural resources that firms produce and that consumers prefer (Arnould, 2005). On this basis – and in contrast to the predictions of the Big Middle – Herbert et al. (2018) predict that the retail landscape will become increasingly fragmented as society changes and as retailers experiment with various retail formats to align with consumers' malleable, unfixed preferences.

Internationalization, Glocalization, and Hybridization of Food Retail

Within the food retail environment, the term supermarketization refers to the process by which the introduction and relative growth of modern food retailers has displaced traditional food retailers. The supermarketization phenomenon has been observed across developed and developing countries alike (Reardon et al., 2003), through at different times, speeds, and with different rates of market penetration (Dries et al., 2004; Reardon & Hopkins, 2006). Although the principal distinction of concern is the retail format rather than the type of firm ownership, the supermarketization process has been associated with the entry of foreign-owned modern-format retailers into developing countries via foreign direct investment. The internationalization of food retail is typified as follows: Foreign retailers enter developing countries by transferring their successful domestic offer (Grosso et al., 2018) built on specific advantages (e.g., brand names, business techniques, marketing and management skills, supply chain and logistics),

[36] The socio-cultural reading of the Big Middle is therefore an interpretation and not a rejection of rational-choice utility maximization theories rooted in economics (Wilk, 1998). In this view Wal-Mart - the original case study underpinning the Big Middle framework - has succeeded not only because of its product assortment and competitive prices (derived from superior management and back-office operations) but also because of its distinct store image and narrative linking to the myth of America's small shop-keepers (Badot, 2005).

overcoming market imperfections and barriers to entry in the search for increased sales and profits. The extent to which foreign supermarkets transfer their core business model (including 'culture') or adapt it to a developing country context may vary (das Nair, 2018). Foreign direct investment and the supermarketization process are both considered as forms of globalization.

Retailers in developing countries face distinct challenges from those operating in developed countries, including the co-existence of modern – both local and foreign-owned – and traditional retail with the latter significantly more present in the market. The competition between modern and traditional retail (as well as e-commerce) has made the retail segment in developing countries extremely competitive, and challenges the sustainability of product-centric retail strategies (Gupta & Ramachandran, 2021). Gupta and Ramachandran (2021) recommend that retailers (whether modern or traditional) adopt a customer-centric approach to compete. Conversely, Ger (1999), focused on firm origin as a point of distinction, has argued that a customer orientation is insufficient for local retailers to compete with international firms and instead recommends that they seek out alternative market niches and emphasize their local identify and culture.

Studies of globalization typically adopt a perspective of the local impact of global market forces, particularly in non-western contexts; studies of global marketing often assume a one-way flow.[37] This perspective has drawn criticism from those who envisage globalization not as a uni-directional emulation process but as a concurrence of multi-directional flows (Ger, 1999; Wilk, 1998), and who argue that globalization is more appropriately conceived as 'glocalization' (Askegaard & Eckhardt, 2012). The term glocalization refers to the adaptation and objectification of structures of common difference in local contexts (Kjeldgaard & Askegaard, 2006, citing Robertson, 1992). Glocalization is marked by the coexistence of dimensions of similarity and difference. In this conception, market actors "interpret and rework global cultural practices and meanings to fit into their local contexts. Consumption practices are hence inscribed in local, historically constituted cultural discourses" (Kjeldgaard & Askegaard, 2006: 231). From a macro-level perspective, glocalization occurs as the global market materializes in local contexts (Kjeldgaard & Askegaard, 2006), and as a hybridization process yields many local adaptations and translations of international or global models (Wilk, 1998).[38] "Glocalization implies that the global always becomes localized, and the local, globalized" (Kjeldgaard & Askegaard, 2006: 234). Despite these multi-directional flows, the concept of glocalization implicitly embodies a critical power dimension: "Homogenization based on Western models primarily occurs at a structural level because consumers and cultures alike increasingly organize their social and cultural lives along similar institutional arrangements created by globalizing power blocs, such as transnational corporations" (Kjeldgaard & Askegaard, 2006: 234, citing Wilk, 1995). Despite this conceptual shift, the number of empirical studies of glocalization – specifically of multi-way flows in globalization – has been limited (Askegaard & Eckhardt, 2012).

[37] Such a culturally imperialist view might predict that, "The new global culture will be consumer culture, mass-mediated through advertising by large multinational corporations who will promote the same goods in every market, changing only the language of the labels and advertisements" (Wilk, 1998: 316).

[38] This study adopts the macro-level perspective of glocalization as presented in the work of Askegaard and others, rather than the more micro-level perspective of researchers who focus their attention on the glocalization strategies of individual firms.

Extrapolating from this conception of glocalization, we shift focus from global consumer culture to the consumer-moderated practice of food shopping. According to Askegaard and Madsen (1998: 563), "We may see a globalization of the food supply and consequently of the competition at the same time as a fundamental adaptation of this global product range to local cultural patterns, another example of the 'glocalization process.'" Even within globalization – in this case, manifesting as supermarketization – glocalization scholars would predict that there is some adaptation of a global consumer culture to match local conditions. In this, the literature on glocalization aligns with the work of retailing scholars such as Goldman (1974a, 1974b, 1975-1976), who predicted that retailers in developing countries would adapt their formats to local conditions in such a way as to hybridize their offer. This hybridization pertains to both foreign retailers entering a developing country, and local retailers amending their offer to compete with new entrants. Indeed, "In spite of many success stories, rapid retail internationalization into emerging countries does not always lead to success. International retailers entering emerging markets run into strong competition from local operators who often have store management experience and can adapt their retail offer better to the local context" (Grosso et al., 2018: 118, citing Diallo & Cliquet, 2016).

Food Retail: Definitions, Classifications, Characteristics, and Value Propositions

The academic literature offers multiple definitions of specific retail formats (Alexander & Doherty, 2010; Reynolds et al., 2007). Definitions vary by researcher, country, and time (Brown, 1987). The definition and classification of retailers is arguably an artificial construct, simplifying while overlooking potentially important variation in order to derive meaning and "make sense of and organize a multiplicity of singularities" (Kjeldgaard & Askegaard, 2006: 246).

Despite these problems of definition, "modern food retailers" generally refers to large-format, self-service, chained stores including supermarkets, hypermarkets, and discount stores. "Traditional food retailers" include mom-and-pop grocery stores and specialist retailers like butchers and greengrocers (Reardon et al., 2003).

In practice, (food) retailers may be distinguished based on a range of characteristics. Specific retail formats are acknowledged to differ, qualitatively and quantitatively, in the range of services offered (such as product assortment, price, convenience, personnel, etc.) (Aranda et al., 2018). Other retail scholars similarly identify characteristics of food retailers to include physical size of the establishment, product assortment, extent of self-service, and price level (Goldman, 1975-1976).[39] Distinguishing factors related to the retailer's offer may be visible to the consumer, whereas factors related to retailer know-how tend to be tacit or hidden from customer view (Goldman, 2001). In his review of retail marketing, Mulhern (1997) classifies such characteristics according to a retailer's strategic or tactical decisions. Strategic decisions pertain to store location; store positioning including overall price and quality, product assortment, and store brands; store image; physical environment; and retail service. Tactical decisions pertain rather to pricing, promotion, advertising, in-store displays, and shelf space. Both Reynolds et al. (2007) and Aranda et al. (2018) argue that a retail format is the physical embodiment or projection of a retail business model. In this way, a retail format may be conceptualized as a business strategy: It reflects

[39] Elsewhere, Seock and Lin (2011: 109) similarly describe the store retail environment as "an accumulated idea made up of store attributes, such as product quality and selection, pricing policy, sales staff and location."

the value proposition and the products and services offered by a retailer to its target market and customers.

The application of a selection of characteristics can indeed be useful to study different types of food retailers. For example, in a case study from Mexico, Atkin et al. (2018) distinguish foreign-owned supermarkets[40] from domestic retailers across several key factors: Foreign-owned supermarkets are reported to offer lower prices, higher product quality, wider product assortment (generally and more foreign than domestic store-brands), and better amenities. Amenities include more hygiene; greater security, more parking spaces, and better car accessibility; and more attractive display and organization of products. The major negative point of foreign-owned supermarkets pertains to store location, as they are located further from town centers due to their larger size and later market entry.

Methodology

Study Context

The focus of this study is Lebanon, specifically the greater Beirut metropolitan area. Beirut is the political and commercial capital and largest city in Lebanon, home to 7% of the country's total population; 49% of the population lives in Beirut or Mount Lebanon governorate, which immediately surrounds Beirut. Lebanon's population is largely made of nationals (approximately 80%), but also includes significant populations of foreign workers as well as refugees from Iraq, Palestine, and Syria (Central Administration of Statistics, n.d.-c). While the native and official language of Lebanon is Arabic, both French and English are commonly used for educational, social, and business interactions. Other languages are also present, including Armenian, Tagalog, Amharic, and Sinhalese, particularly within immigrant sub-populations (Bacha & Bahous, 2011). A diversity of religions are practiced within the country, and various forms of Christianity and Islam are the reported affiliations for a majority of the population. Since Lebanon's Civil War (1975-1990), the direct connection of religion to politics has served to exacerbate community divisions and (for many) reinforce sectarian identity within and beyond Lebanon's borders (Haddad, 2002), with Christians tending to look west and Muslims tending to look to east to other countries of the MENA region.

Previous research has documented early evidence of supermarketization in Lebanon (Seyfert et al., 2014). According to the latest available data from Euromonitor International (2020), modern retailers (including supermarkets, hypermarkets, and discount stores) accounted for 22.2% of all store-based grocery retailing by value in Lebanon in 2019, with the remainder attributed to traditional retailers. The relative market share of modern retailers reinforces that Lebanon is in the early stages of supermarketization, in comparison to developed economies as well as other countries of the MENA region (Seyfert et al., 2014). Nevertheless, assuming that the supermarketization process may continue as it has in other developing countries, then it is useful to assess the current offer of modern food retailers as part of Lebanon's wider food environment, as possible evidence of a hybridization process, and as a reflection of glocalization in Lebanese society.

The context for this research is unique, as it reflects Lebanon's food retail environment before or at the onset of multiple crises. Lebanon experienced a political upheaval beginning in October 2019, which (inter

[40] Defined as 49% or more of the firm held by a foreign retailer.

alia) triggered temporary road and business closures and disrupted supply chains. In response to the declaration of the COVID-19 pandemic, the Government of Lebanon declared a national state of mobilization (lockdown) that first went into effect on March 15, 2020. The country has also experienced an economic collapse, which gained momentum from mid-2020 as the currency depreciated rapidly[41] and annual inflation rates reached triple digit figures[42] (World Bank, 2021, June 1). These shocks undoubtedly had a significant effect on the country's food environment.

Qualitative Methods

This study relies on qualitative methods, namely structured observations of food retailers.

Qualitative approaches can be based on two principles, 'asking questions' (conducted via interviews) or 'hanging out' (conducted via direct observation) (Bengtsson & Ostberg, 2006; Dingwell, 1997). While observation is commonly used in social sciences such as sociology or anthropology, its use in marketing allows researchers to move away from what consumers say to focus on what they do (Peñaloza & Cayla, 2006) by directly and synchronously observing their behaviors or by asynchronously searching for traces of these behaviors (Dion & Sitz, 2013). It may also depart from observing behaviors to focus on material artifacts, to record rich details about consumption contexts (Peñaloza & Cayla, 2006) such as points of sale (Peñaloza, 1998). Adjusting the focus of observation from micro-social behaviors to artifacts and their place in consumption allows researchers to shift perspective and study more macro-level phenomena (Bengtsson & Ostberg, 2006). The observation of micro data, such as the work produced by (Kozinets, 2002) through the observation of the Burning Man festival, is also likely to offer an understanding of the way in which macro social or cultural phenomena influence the situations in which consumer behaviors take place (Kates, 2006). In retailing, the point of sale is the interface through which consumers interact with the marketing intentions of retailers, moderated by the actions of the staff they contact. The observation of this artifact in developing country contexts is not completely without precedent (e.g., Maumbe & Chikoko, 2020) and is therefore particularly suited to understand how supermarketization advances via hybridization and conveys the flows of glocalization in Lebanon.

In the same way as interviews can be more or less directed, so, too, can observation (Mintzberg, 1970). Structured observation is then based on three principles: 1) It is carried out by a person outside the subject, 2) it is based on an a priori – though flexible – categorization system, and 3) observed phenomena are purposively sampled (Martinko & Gardner, 1985).

In this study, structured observations were conducted with a focus specifically on modern retailers including hypermarkets, supermarkets, and discount markets. This focus is appropriate given the intended contribution of this research, to understand the phenomenon of supermarketization in Lebanon and the manifestation of retail hybridization as a reflection of the glocalization process. The selection of food retailers for inclusion in the observation was purposive, to include retailers spanning a variety of

[41] The exchange rate had moved from the historical, pegged rate of 1,508 LBP : 1 USD, to 2,525 LBP : 1 USD on the informal market as of March 14, 2020. The depreciation gained momentum in mid-2020, and the exchange rate stood at 26,433 LBP : 1 USD on the informal market as of May 2, 2022 (lirarate.com).

[42] The annual change in the price of food and non-alcoholic beverages stood at 38.19% in March 2020; this figure jumped to 150% in April 2020 and has remained in triple digits since that time (through August 2022, latest data available) (Central Administration of Statistics, 2022).

characteristics, notably origin of ownership (local versus international) and principal retail format (supermarket versus hypermarket versus discount store) (**Table 14**). Observations were conducted at selected food retailers in the greater Beirut metropolitan area. For those retailers that operate more than one outlet in the greater Beirut metropolitan area, the selection of observation sites was informed by convenience to minimize travel time (nearest location or clustering of observations). A total of five (5) observations were conducted at different food retail outlets in February and March 2020; all visits were conducted on a weekday between mid-morning and mid-afternoon. Each visit required between 30 and 60 minutes to conduct. The visits were conducted to view every area of the store accessible to the public. During the visits, field notes were recorded electronically on a smartphone; field notes were transcribed and elaborated within 48 hours of the observation to ensure reliability of data. In instances where multiple members of the research team conducted an observation, field notes were exchanged to correct any gaps or errors.

Table 14. Retail Outlets Visited for Structured Observation

Retailer Name	Origin of Ownership	Retail Format	Number of Outlets [43]	Day & Time of Visit
Carrefour	International [44]	Hypermarket	9	Wednesday afternoon
Coop-Al Makhazen	Local [45]	Supermarket	36	Tuesday morning
Happy	International [46]	Discount Store	15	Friday afternoon
Rammal	Local [47]	Supermarket	16	Friday afternoon
Spinneys	International [48]	Supermarket	16	Monday morning

[43] The number of outlets refers to the number reported on respective company websites as of September 21, 2022 (see https://www.carrefourlebanon.com/maflbn/en/store-finder, https://aboutus.almakhazen.me/en/, https://www.happydiscountstore.com/, http://smrammal.com/, and https://www.spinneyslebanon.com/, respectively) . The author has not independently verified the reported number of outlets.

[44] Carrefour and UAE-based Majid Al Futtaim Group launched Carrefour Lebanon in 2013, operating it as a joint venture (YellowPlace, n.d.).

[45] Coop – formally, "Lebanon Cooperatives" – was founded in 1977 in the midst of Lebanon's Civil War under a shareholder ownership structure. Coop operated up to 49 locations throughout most of Lebanon, dominating the supermarket segment until it became a commercial and political target in the early 1990s. Following investigations of fraud, Coop was transferred to the control of the newly created United Central Markets Company, which was to manage and operate Coop on a lease basis through 2020. Saudi investors later bought a majority of the United Central Markets company and thus gained control of Coop (Wahba, 2011, November 18). According to the company website, the Saudi-owned private firm Al Makhazen took over Coop in approximately 1993 (Al Makhazen, 2022). A clear timeline of Coop-Al Makhazen's ownership and details on the current ownership are not immediately available.

[46] Happy falls within the Spinneys brand. Since 2018, it is owned by Gray Mackenzie Retail Lebanon SAL (Sursock, 2018 January 17).

[47] Rammal was founded by Maher Rammal (Abou Amer), a Lebanese businessman. Rammal first opened in the 1960s as Rammal Station, a vendor of food (specifically grains) and cleaning products. Rammal Station became Rammal Supermarket Original (Abou Amer) in the 1990s. Rammal operates solely in Lebanon (Rammal Original, 2018).

[48] Spinneys was founded by Arthur Rawdon Spinney, a British businessman who began operations in Egypt in 1924 before expanding elsewhere in the MENA region. Spinneys initially launched operations in Lebanon in 1948 and opened several locations throughout Beirut, but closed in 1976 due to Lebanon's Civil War. Spinneys supermarkets re-launched in Lebanon in 1998 (Spinneys, 2020) and were sold to UAE-based Abraaj Capital in 2004 (Schellen, 2014, February 6). In 2018, Abraaj Capital sold the Spinneys brand including its Spinneys supermarkets and Happy discount stores to Gray Mackenzie Retail Lebanon (Sursock, 2018 January 17).

An observation guide was prepared in advance of observations to serve as a checklist and ensure that observations addressed common aspects for the purposes of comparison among retailers (Mintzberg, 1970, 1973). The observation guide and subsequent analysis focus on the visible characteristics of supermarkets such as those proposed by Goldman (1975-1976) – including physical size of the establishment, product assortment, extent of self-service, and price level – but necessarily omit hidden factors that cannot be determined through observation such as level of margins earned by the retailer. Analysis was completed using a multi-step process. The researcher re-read all field notes and assigned to relevant language the preliminary codes derived from the existing literature. Codes were reviewed and organized into categories; codes and categories were initially based on the observation guide, though additional or modified codes and categories were introduced to reflect the content of the observations as conducted. The original observation guide and final list of categories are available as Annex 1 and Annex 2 to this article, respectively.

The research was undertaken by a lead researcher. The lead researcher is a non-Lebanese adult female of upper-middle class economic status, who had resided in Beirut for more than six years at the time of the observations and who has previous experience as a researcher on the topic of food retail in Lebanon. Another member of the research team – an adult Lebanese male with a background in food security and prior experience in data collection within food retail environments – offered limited contributions to this work.

Results

Analysis of the observation data reveals several notable aspects of the value proposition offered to consumers by different retailers. These aspects are grouped by theme, spanning the strategic aspects of a retailer's offer (store location, physical accessibility, product assortment, hygiene and food safety, customer service) as well as the tactical (pricing display, company brand signals, organization and display, store atmosphere) in addition to possible customer orientation. While there was a significant degree of overlap in their value proposition, points of distinction were also observed.

Store Location, Size, and Layout

Observation reveals points of distinction across the retail outlets visited with regard to store location, size, and layout (**Table 15**); blue shading indicates a distinction according to retail format (hypermarket, supermarket, or discount store).

The five retail outlets visited for structured observation are located in the greater Beirut metropolitan area. Two of the retailers visited (Coop-Al Makhazen and Spinneys) are located in densely populated, urban areas within the Beirut municipal area: Hamra is a densely populated, mixed-use neighborhood home to a range of commercial businesses (shops, banks, hotels, restaurants, etc.). The remaining retailers are located in less populated suburban areas. Carrefour is located in Dora, within a shopping mall located on the major highway running north from Beirut. Happy's Choueifat location is on a street of commercial and residential buildings. Rammal supermarket's Khaldeh outlet is located on a main road branching off the Beirut-Saida highway, with other stores in the vicinity and in adjacent streets.

Table 15. Store Location, Size, and Layout by Retail Outlet

Name	Carrefour	Happy	Spinneys	Coop-Al Makhazen	Rammal
Origin of Ownership	International	International	International	Local	Local
Format	Hypermarket	Discount	Supermarket	Supermarket	Supermarket
Municipality	Dora	Choueifat	Hamra, Beirut	Hamra, Beirut	Khaldeh
Store Area	Suburban	Suburban	Urban	Urban	Suburban
Location	Shopping Mall	Neighborhood	Neighborhood	Neighborhood	Neighborhood
Checkout Counters (#)	16	3	4	3	7
Turnstile at Entry		X	X	X	X
Floors / Levels	Single	Single	Multiple	Multiple	Multiple
Elevator	*N/A*	*N/A*			X
Trolley Escalator	*N/A*	*N/A*	X	X	X

Four of the five retailers occupy space within multi-story, mixed-use commercial-residential buildings. Uniquely, Carrefour's Dora hypermarket is located within City Mall, a large shopping mall that offers a range of other retail stores, a movie theater, and restaurants. The store entrance is located within the mall: Customers must enter the mall to access Carrefour.

Retailers differ in terms of the physical space of the outlet. As observation did not allow an exact measurement of the retailers' respective sizes, the number of checkout counters serves as a rough proxy. The largest number were observed at Carrefour (consistent with the large spaces of a hypermarket), and the fewest at Coop-Al Makhazen and Happy.

Physical Accessibility

Retailers vary in the degree to which their space is physically accessible to individuals with limited mobility, whether linked to a physiological restriction or an external restriction (e.g., shopping using a trolley or with a child in a stroller).

In terms of entry to the outlet, Carrefour is most accessible as the store offers entry through a wide set of metal detectors. Conversely, the four other retailers visited require customers to pass through narrow metal turnstiles to enter their stores. Spinneys is the most difficult outlet to enter, as customers must also use a flight of stairs to enter the basement-level outlet.

Store layout also varies across retailers, with the supermarkets proving least physically accessible once inside the store. Carrefour City Mall is the easiest outlet to navigate, as the store is laid out over a single floor and features wide aisles; only the checkout lanes are narrow and confining. Happy is generally easy to navigate, as the entire store occupies a single floor, though in some areas towards the back of the store narrow aisles impede movement (e.g., for customers with shopping trolleys). Those stores – all supermarkets – that are arrayed over multiple floors are more difficult, even dangerous, to navigate. Coop-Al Makhazen is laid out over two levels, with a ground-floor entrance; a full-length staircase (with trolley escalator) restricts access to the basement level. Narrow aisles on the ground floor restrict movement within Coop-Al Makhazen, especially when passing other customers, employees, or idling equipment. Rammal also occupies multiple floors, and circulating within all areas of the store requires navigating stairs or accessing a service elevator. Staircases leading to the basement and first floor levels

are long, constructed of marble material, and lack either handrails or slip guards. Spinneys offers the most restrictive, even warren-like store layout: The store is physically at the basement and sub-basement levels, and to reach the sub-basement requires either navigating an internal staircase or a series of two ramps, the first of which has a steep slope. The alcohol section located off the sub-basement requires navigating a small flight of stairs (three steps); no escalator facilitates entry to the alcohol section. Aisles within Spinneys were narrow in several areas of the store, limiting movement.

Of the three stores that were arranged over multiple floors, only one appeared to offer an elevator for use by customers: Rammal allowed customers to use an elevator to access different floors of the store, though the location of the elevator did not seem to allow access to the split-level off the ground floor displaying perishable products. At Coop-Al Makhazen, a service elevator located at the basement did not appear to be for customer use. No service elevator was visible within Spinneys.

All five outlets visited display goods on shelves. The height of some displays makes it difficult to retrieve items placed on higher shelves without assistance.

Product Assortment

Supermarkets typically offer a wide assortment of food and non-food products, and all of the retailers visited adhered to this criterion. However, there was variation in the assortment offered in each store as presented in **Table 16** and elaborated below. Points of distinction in the product assortment across retailer classifications are indicated via shading: Yellow shading indicates a distinction between international and foreign owned retailers while blue shading indicates a distinction based on retail format (hypermarket, supermarket, or discount store).

Table 16. Product Assortment Offered by Retail Outlet

	Carrefour	Happy	Spinneys	Coop	Rammal
Origin of Ownership	International	International	International	Local	Local
Format	Hypermarket	Discount	Supermarket	Supermarket	Supermarket
Food					
Non-Perishable					
Canned Food	X	X	X	X	X
Dry Goods	X	X	X	X	X
Frozen Foods	X	X	X	X	X
Snack Foods	X	X	X	X	X
Alcoholic Beverages	X	X	X		
Beverages	X	X	X	X	X
Perishable					
Baked Goods	X	X	X	X	X
Butcher	X	X	X	X	X
Deli	X	X	X	X	X
Pork Products	X	X	X		
FFV	X	X	X	X	X
Specialty					
Bakery (in-store)	X		X		
Fresh Seafood	X				
Healthy/Organic	X		X	X	X
Mouneh [49]	X		X	X	X
Roastery [50]	X		X		
Non-Food					
Baby Care	X	X	X	X	X
Beauty	X		X	X	X
Books & Magazines	X				
Children's Toys					X
Clothing	X				X
Décor					X
Electronics	X	X	X	X	
Garden/Balcony	X		X		
Home Improvement					X
Household Cleaners	X	X	X	X	X
Housewares	X		X	X	X
Hygiene Products	X	X	X	X	X
Pet Food		X	X		
Tools					X
Eat-In Restaurant	X				

Food Products – Assortment, Sizes, and Brands

In terms of the composition of food product lines, Carrefour hypermarket offered the greatest assortment while Happy discount store offered the most restricted assortment (Table 3). Carrefour offered an array of food products, generally organized into identifiable sections. Non-perishable food included frozen

[49] *Mouneh*, or preserves, is a category of traditional Lebanese food items that includes preserved, pickled, and dried foods.

[50] Roastery is a category of foods including freshly roasted nuts and seeds and selected snacks (crackers, dried fruit).

foods, canned foods, jarred goods, dry goods, snack foods, beverages, and baby food. Perishable food included fresh seafood, fruits and vegetables, deli meats and cheeses, dairy products, and eggs. Carrefour offers a wider array of some product lines than were observed at other retailers (baby food, Lebanese kaak breads, canned meats, foods and wine imported from France). An entire half aisle was dedicated to organic, diet, and gluten-free products. Within its large retail space, Carrefour hypermarket offered additional sections not observed in other retail formats, allowing its customers one-stop convenience with its fresh seafood counter and eat-in restaurant. Carrefour's food assortment appeared to be tailored to local tastes, for example in the range of canned meat products available. Conversely, Happy discount store offers a more restricted assortment of food items. For example, it is the only retailer visited that did not offer a dedicated area or display for healthy/organic foods or local mouneh items.

The availability of pork products and alcoholic beverages were of particular note, as these products are not permitted for consumption among strict adherents of certain religions practiced in Lebanon (notably Islam and Druze). The three foreign retailers visited offered such products for sale, while Coop and Rammal did not. The underlying reason for the absence of these items from food retailers' shelves is not clear from observation alone: This may be a decision based on the beliefs of the storeowners, a prioritization of shelf space based on the shopping habits of regular customers, or a reflection of respect for regular customers' beliefs.

Turning to specialty food items, foreign retailers Carrefour and Spinneys have gone so far as to incorporate specialty food counters within their offer. Both have included an in-store bakery and full-service roastery counters, while Carrefour hypermarket also offers a fresh seafood counter. In this way, they have absorbed traditional retailers into their offer to consumers, a point of distinction from local retailers. Elsewhere, other retailers stopped short of offering specialty food counters though they did offer unique specialty items. For example, despite its relatively restricted assortment of foods, Happy sold jars of wild capers, Caen-style canned tripe, and sweet and dry Normandy-style cider at the time of observation. Rammal sold unusual, non-local grains (quinoa, rye); local items including fresh grape leaves and red pepper paste; and non-perishable items including pickling salt.

Next, we observed variation in the depth of choice within a given food product category. For example, at locally owned Rammal supermarket, the array of non-perishable, processed food products occupied relatively more shelf space than in other supermarkets. Similarly, the array of bread and grain products (e.g., quinoa and rye) were larger than in other supermarkets in terms of both variety and sizes of products offered, possibly a reflection of Rammal supermarket's origin as a grain specialist. Conversely, and as expected, Happy discount store offered a limited range of food products per category as compared to other retailer formats: The deli counter offered a smaller selection of meat and cheese products and the fresh fruits and vegetables (FFV) section displayed only the most common fruits and vegetables on the market.

The sizes of products offered for sale also varied between food retailers, with larger sizes standing out. Carrefour sold products in a range of sizes, including large, value, or family sizes. Coop offered noticeably more family-size packages of staple products including milk powder, processed cheese, and instant coffee as well as fresh dairy products (butter, shredded cheese, and laban) than other retailers. Happy offered several items in exceptionally large sizes, for example rice in bags of 3.5 kg, pasta in boxes of 1 kg instead

of 500 g, and longer lengths of aluminum foil. At Rammal, food packages ranged in size from small or snack sizes to normal to family or value sizes. Rammal offered exceptionally large size products for sale at the time of observation, including laban (Lebanese yogurt) sold in 5-kilogram buckets – the only time this large size was observed on any of the visits.

In terms of brands, every store offered a combination of international, regional, local, and own-brand[51] food products. Local and regional brands appeared to account for a higher proportion of products offered at Coop than at other retailers, notably Spinneys. At Happy, brands were generally of moderate quality rather than high quality or luxury brands, and some of the international brands were completely unknown to the research team. Similarly, Rammal displayed some completely unknown brands; of note, Rammal offered a notably large selection of brands for some staple food items, for example rice.

Each retailer offered at least one range of own-brand food products, with most retailers offering multiple own-brands. Coop- and Spinneys-branded products spanned both food (bread) and non-food (soaps) products. Carrefour has two own-brand lines under the "Carrefour" and "No. 1" names, offering dry, canned, and jarred goods; the first corresponds to an international private label and the latter an economic private label. This offer is consistent with retailers' practices in other developing country markets, where distinct own-brands are used to deliver varying levels of quality and distinct consumer perceptions (Diallo, 2012). Happy stocked no less than four own-brands, including Spinneys-branded products (Spinneys is the parent company of Happy); Happy-brand products including staple items, a full range of spices, and bottled water; and several European retailers' own-brands including Casino and Netto. Rammal was an apparent outlier in its approach to own-brands, as it offered multiple own-brand lines but with names that obscure the association with the (or any) retailer; for example, its primary own-brand is under the "Lumiere" label. Moreover, Rammal's own-brands appear to be distinguished by product range rather than product quality and perception.[52]

Point of origin marketing – here referring to signage supplemental to what is on a product's package or label – was not prominently featured in the display of any of the retailers observed, regardless of ownership or format. Carrefour made limited use of point of origin labeling on signs, excepting for fresh seafood and selected bakery products. Spinneys indicated the point of origin on selected wine products (local and imported).

Non-Food Products – Assortment

All retailers visited offered non-food products for sale. The most commonly observed categories of non-food items included baby care items, household cleaners, housewares, hygiene products, and electronics (**Table 16**).

In terms of non-food products, Carrefour and Rammal offered a significantly wider assortment than the other retailers visited. Carrefour sold non-food products including electronics and small appliances, housewares, luggage, books and magazines, clothing, garden/balcony, baby products, religious items (votive candles displaying Christian imagery), beauty products, and house plants. Non-food products

[51] Own-brand products are also referred to as store brand or private label brands within the literature.

[52] For example Lumiere spans non-perishable foods including canned goods while Al Aoud is specific to tea, coffee, and rice (Rammal Original, 2018).

accounted for approximately half of the entire store space. In addition, the array of products within certain categories, notably baby products, was wider than observed at other retailers. Similarly, Rammal offered a wide array of non-food products including beauty, décor and seasonal items, baby products, children's toys, and household cleaners and cleaning tools. In addition, the sizeable first floor was dedicated to non-food products, including clothing for children and adults, home improvement items (sinks, toilets, and faucets), hand and small power tools, and décor.

Hygiene and Food Safety

Observation revealed a common approach to basic measures for hygiene and food safety across all retailers, regardless of ownership or format. These measures included the use of glass barriers at full-service counters to separate customers from fresh products like butchered meat and deli meats and cheeses. At all retailers, those employees working behind butcher and deli counters wore uniforms or protective equipment including hairnets, gloves, and/or lab coats.

In some cases, signs also made reference to hygiene and food safety practices: At Carrefour, a sign clearly displayed in the butcher section indicated safe hygiene and food handling practices. At Rammal, in the fresh fruits and vegetables section, an Arabic language sign instructed customers to use gloves when handling produce.[53]

However, hygiene and food safety were not always strictly in evidence and anomalies were observed at each outlet, again without distinction based on ownership or format. At Carrefour, hygiene practices within the fresh seafood section were contradictory: The fresh seafood display was within reach of customers and not separated by any protective measure, while an employee was in the midst of cleaning in the interior kitchen area. At Coop, a floor cleaner was present in the store at the time of observation, but not actively in use. At Happy, an open-front cold case contained a full display of leafy greens and root vegetables, but was not functional at the time of visit; no measures were observed to address the fruit flies buzzing around the front of the case. At Rammal, a freezer case containing oddly shaped boxes of seafood products with a promotional steamer was open, leaking cold air. At Spinneys, employees working behind deli and butcher counters appeared to be touching unclean surfaces (faces) without replacing gloves.

Customer Service

Observation revealed that retailers offered several types of service to their customers, including the availability of on-site parking, counter versus self-service, equipment to facilitate shopping, and loyalty programs to reward return customers. These services are summarized in **Table 17**, and elaborated below. Again, several points of distinction in customer service across retailer classifications are indicated via shading: Yellow shading indicates a distinction between international and foreign owned retailers while blue shading indicates a distinction based on retail format.

Table 17. Customer Services by Retail Outlet

	Carrefour	Happy	Spinneys	Coop	Rammal

[53] While the observation was conducted in advance of the lockdown due to COVID-19 imposed by the Lebanese government, the spread of the disease globally was already a source of growing concern.

Origin of Ownership	International	International	International	Local	Local
Format	Hypermarket	Discount	Supermarket	Supermarket	Supermarket
On-Site Parking	X	X			X
Counter vs. Self Service					
Bakery	Counter	*N/A*	Counter	*N/A*	*N/A*
Beauty	Full Self	*N/A*	*N/A*	Full Self	Counter
Butcher	Counter + Full Self	Counter + Full Self	Counter + Full Self	Counter	Counter
Deli	Counter	Counter	Counter	Counter	Counter
FFV	Partial Self	Partial Self	Partial Self	Partial Self	Partial Self
Fresh Seafood	Counter	*N/A*	*N/A*	*N/A*	*N/A*
Mouneh	Counter	*N/A*	Counter	Counter	Counter
Roastery	Counter	*N/A*	Counter	*N/A*	*N/A*
Shopping Equipment					
Baskets	X	X	X	*(unavailable at time of observation)*	X
Trolleys	Large	Medium	Small	*(unavailable at time of observation)*	Medium
Trolley Escalators	*N/A*	*N/A*	X	X	X
Loyalty Program	X	X	X		
Credit/Debit Card Terminal	X	X	X	X	X
Customer Service Counter	X		X	X	
Customer Bathroom		X			

Three of the food retailers observed offered their customers convenient, on-site parking. Customers of Carrefour City Mall may park within the subterranean parking lot that services the entire mall, though parking is for a fee. Happy offers free parking in a few dedicated parking spots directly in front of its store, in addition to a dedicated, open-air, unpaved parking lot located across a busy street from the store. Similarly, Rammal offers a dedicated, open-air, paved parking lot adjacent to the store, reserved for the use of its customers at no fee. In contrast, those retailers located in more densely populated urban environments did not provide parking for customers.

All retailers offered a combination of counter service, partial self-service, and full self-service that varied according to product type. For example, all retailers offered full self-service for most non-perishable foods and non-food products, counter service for butcher and deli sections, and partial self-service for FFV: Customers could select their own fruits and vegetables and place them in bags, but employees were required to weigh products and affix a price sticker to the bag. For butchered meat products, only foreign retailers offered a combination of counter service as well as full self-service to select pre-packaged cuts of meat or ready-to-cook meat products from a cold case. As compared to the other retailers observed, Carrefour offers a remarkable range of full-service counters: mouneh and spices, roast nuts, specialty cakes, bakery, eat-in grill, seafood, deli, and butcher. Rammal was the only retailer visited that offered beauty products through counter service. The utility of counter service was in some cases reduced by the non-presence of employees at selected counter service stations at the time of observation (Carrefour, Rammal).

Four of five retailers offered shopping trolleys or baskets to customers at or near the entry to the store.[54] Carrefour offered trolleys significantly larger than those at other retailers visited. At Coop, however, while a space inside the store entry was dedicated to the placement of shopping trolleys and baskets, none were available at the time of observation. Coop, Rammal, and Spinneys – the three retailers whose stores extend over more than one floor – all offered trolley escalators adjacent to staircases to allow shoppers to take their trolleys with them as they shop across different floors.

Only the foreign retailers offered a customer loyalty program, as evident through in-store promotional materials or revealed through interaction with a store employee. While Carrefour operates a customer loyalty program, there was limited promotion of this program within the store space. Upon checkout, an employee asked the customer if they had a loyalty card; but when informed to the negative, made no offer or referral to open a loyalty card. Happy offers a "Smiles" loyalty program, earning points for each product purchased, and references to the program were evident throughout the store on price labels. At checkout, the employee asked if the research team had a loyalty card; when no card was produced, no offer was made to open a card. Notably, this program is exclusive to Happy, and Happy does not accept the loyalty card for its parent company, Spinneys. Spinneys' loyalty program was advertised in signs facing the checkout counters, indicating the number of points needed to redeem for housewares and small appliances. At checkout, the employee asked all customers for the loyalty card.

All five retailers offered customers the ability to pay using credit or debit cards, as reflected in the presence of payment terminals or boxes placed at checkout, suggesting an important application of customer-oriented technology regardless of retail format or ownership. Conversely, no retailer offered self-checkout terminals (with or without the use of handheld self-scanners).

Dedicated customer service desks were observed within three of the five retailers. At Carrefour, customer service counters were located at the front of the store, even featuring the names of selected store managers. A desk advertising "financial services" was located within the store, though no employee was available at the time of observation. Additionally, two of the full-service counters were not staffed at the time of observation. Similarly, at Coop, a customer service desk was located near the entrance to the store, but the employee at the desk was not attentive to passing customers. At Spinneys, a staffed customer service desk was located directly facing the entrance. In addition, pre-recorded announcements on the loudspeakers invited customers to call customer service for any needs.

Happy discount store was the only retailer to indicate clearly via signage a bathroom available for customer use.

Pricing Display

Retailers made use of various approaches to inform customers of the prices of goods, which varied according to the specific type of display as well as in terms of language used (**Table 18**). Carrefour clearly

[54] "[M]undane artefacts such as shopping carts, shelves, price tags and other items can have great impact on the practices of shopping, consumption, and market making by contributing to consumers' calculation capacity in different ways" (Fuentes & Hagberg, 2013: 297-298).

indicated prices on nearly every shelf or display, even in counter service areas.[55] Product names were listed in English, next to prices in Lebanese lira (LL) and a barcode. At Coop, stickers were affixed to shelf edges, indicating product names in Arabic alongside prices and barcodes. Price stickers were in two color combinations (red and yellow or white and black) but the reason for the difference was not immediately obvious to the observation team. In the FFV section, small signs featuring hand-written, Arabic-language product names and prices were affixed to the display bins for all items. Happy clearly indicated prices on signs affixed to stacked displays or using shelf-level signs indicating using branded tickets that include the product name, price, and the number of "Smiles" loyalty program points earned per product. Exceptionally, Happy's FFV section lacked pricing or identifying information on the produce items in display bins. Product names were listed in English, with prices in Lebanese lira and a barcode. Some inconsistency in price labeling was noted, for example, two tickets on the shelf for a single product displaying two different prices, perhaps a reflection of the discount store model and less presence of personnel. At Rammal, pricing information was consistently indicated on or near products, though the means and language used varied according to the type of display. Prices were generally marked on labels affixed to shelves, noting the product name in English and prices in Lebanese lira. For some items, promotion stickers were posted near the price sticker, indicating soon-to-expire goods. Elsewhere, for items displayed not on shelves, product names were written in Arabic and prices were printed on standard white paper and hung over the display (e.g., bottled water on pallets) or noted on clip-on signs (e.g., crates of vegetables). At the deli counter, a television hung overhead displayed prices in Arabic. For seasonal décor items, prices were affixed directly to the item. Finally, Spinneys posted prices on virtually every shelf for every product, featuring product names in English and prices in LL. In the FFV section, small signs near open bins featured product names in English.

Focusing on language, the ownership of the retailer marks a distinction: Internationally owned retailers uniformly printed product information and prices in English, while local retailers displayed this information in Arabic. Only Rammal has a hybrid offer, presenting information in both Arabic and English, though this might reflect practicality rather than a tactical decision: English-language signs were observed especially on supplementary signage that local employees could reprint or hand-write in line with shifting displays.

Table 18. Pricing Display by Retail Outlet

	Carrefour	**Happy**	**Spinneys**	**Coop**	**Rammal**
Origin of Ownership	International	International	International	Local	Local
Format	Hypermarket	Discount	Supermarket	Supermarket	Supermarket
Location(s)	Shelf Floor Display	Shelf Floor Display	Shelf Floor Display	Shelf Floor Display	Shelf Floor Display Overhead On-item
Sticker/Sign Language(s)	English	English	English	Arabic	Arabic English
Currency	LL	LL	LL	LL	LL

[55] The presence of price displays within counter service areas is notable because they are, strictly speaking, not necessary: The use of price displays initially accompanied modern retailers' self-service offer, triggering the development of semiotics around visual (price) displays (Baudrillard & Glaser, 1994).

	Carrefour	Happy	Spinneys	Coop	Rammal
Price Sticker/Sign Barcodes	X	X	X	X	
In-Store Barcode Scanner	X		X		X

Multiple retailers provided a barcode scanner within the store, where customers could verify prices while shopping by placing the barcode on an item's package in front of the scanner. These included Carrefour, Rammal, and Spinneys, thus revealing no clear distinction in the mobilization of this technology according to ownership or format type.

Several retailers emphasized their price advantage to customers through in-store signs or promotional materials, which may have been particularly appealing to Lebanese consumers as inflation began to bite and squeeze household budgets in early 2020. At Carrefour, price advantages were promoted on signs within the store ("Cash Back"). A dedicated promotional section was located immediately inside the store entrance and proposed multi-packs, larger sizes, and greater savings on staple items including sugar, flour, cooking oil, rice, and processed meat; entry through the promotional zone may be tactical to influence consumer expectations that Carrefour is a place for good deals. Similarly, Coop used signs to promote price advantages, low prices, and cash back to customers while also including a dedicated promotional section of food and non-food items (which was located upon entry to the lower floor of the store, and not visible from the store entrance). Happy clearly emphasized its price advantage in its marketing materials: Signs claimed that Happy was voted "#1 for Lowest Prices in Lebanon" while printed promotional flyers advertised weekly deals. Happy featured a promotional section located immediately inside the store entrance, including food and non-food items; and used larger signs affixed to shelves to indicate promotional items. In addition, Happy-branded products offer a price advantage over identical manufacturer prices: For example, 2-liter bottles of water produced by Tannourine and sold under the Tannourine label were more expensive than the same 2-liter bottles of water produced by Tannourine but sold under the Happy label.

A formal and comprehensive comparison of prices across retailers was beyond the scope of this research. However, in some cases price differences were so obvious as to be remarkable: At Rammal, prices for comparable products were observed to be consistently lower than those offered in other supermarkets, a possible reflection of a business that saves on overhead – standard neighborhood location, rough-and-tumble display, and limited company branding (see below) – and passes these through to its customer.

Company Brand Signals

One of the most remarkable differences across the retailers observed was the use of company brand signals outside and inside the store. This difference corresponded generally to retail ownership, with local retailers making less use of company brand signals than foreign retailers. For example, little to no store branding was observed within Coop: The store name and logo were present only on the storefront and on the shopping bags distributed at checkout. Similarly, Rammal made little to no use of branding or logo outside or within the outlet. On the front of the store, the name of the store was written in Arabic script over the entry. Within the store, there was a similar lack of branding under the Rammal name, with the exception of the company name and logo on the plastic bags provided at the checkout counter.

Carrefour made moderate use of company branding. Carrefour displayed its international logo on the walls of the shopping mall and on the storefront, featuring the company name translated to Arabic. Shopping trolleys and baskets available for customer use were made of plastic in the store colors (bright red and blue). Carrefour-branded shopping bags were used at checkout. Spinneys similarly made moderate use of company branding and a yellow and black color scheme. These colors were used on the storefront to indicate the store name and opening hours, shopping baskets (but not trolleys), and shopping bags distributed at checkout. Most Spinneys employees wore black shirts featuring the store logo.

In contrast, Happy made extensive use of store branding and a distinctive purple and yellow color scheme. The store name, motto ("Smile, you're saving!"), and colors were highly visible from outside the store. Colors (yellow and purple) were used extensively throughout the store: shopping trolleys and baskets, promotional flyers, ceilings, walls, shelves, freezer cases, aisle signs, the sign on the customer bathroom, employee uniform shirts, packaging of Happy-brand products, and reusable shopping bags for sale near the checkout counters. Happy's "Smile" logo was also used throughout the marketing materials and pricing signs.

Organization and Display

Retailers varied in their in-store organization and display, with the most orderly and polished display observed at Carrefour and the least at Rammal. Carrefour offered a highly regular and ordered display, using rows of large signs to guide shoppers through distinct store areas divided into wide aisles, clear of obstacles. Displays were generally aligned and uncrowded. Elsewhere, Coop offered an organized display, within a space that was at times physically restricted. Spinneys offered a similarly ordered display; however, the physical space occupied by the retailer is less geometric, resulting in displays that were non-uniform. Both Coop and Spinneys grouped like products in sections or aisles. Happy offered a moderately organized display and layout featuring a combination of long, straight, numbered aisles through the center of the store as well as more narrow areas blocked by obstacles such as surplus wooden pallets resting against shelves. At Happy, products were inconsistently grouped (electronics next to detergents next to cereals next to asparagus): A customer was heard to ask an employee where a product was located, emphasizing the non-categorical organization of items within the store. The organization and display at Rammal were less orderly and more organic than observed in other retailers. The irregular layout of the aisles (non-parallel, unusual angles) required shoppers to move deliberately from section to section. Physical obstacles included discarded cardboard boxes and abandoned trolleys below the trolley escalator. While Rammal had signs overhead indicating directions to various sections of the store, these were inaccurate or out of date.

All retailers used a mix of displays to present goods to shoppers, with the mix generally suited to the types of goods on display: shelves for non-perishable items, open-front cold cases for chilled items, freezer cases for frozen foods, and pallets stacked with beverages or eggs. Displays at Carrefour hypermarket were the most impressive, for example, the organic-healthy foods aisle featured stylized signage and additional lighting. The fresh seafood display at Carrefour was also remarkable and unique among the retailers visited: Fresh fish and seafood were arrayed on chipped ice mounded within waist-height metal display stands with small signs indicating product names and flags for country of origin. Conversely, Happy made

use of industrial metal cages, both to display goods and to organize the store (e.g., forming a barrier between aisles and checkout counters), likely a reflection of is discount-oriented business model. Both Happy and Rammal displayed selected non-perishable products in cardboard boxes cut-away to reveal the items inside. At Rammal, shelves varied in height and style throughout the store, giving the space a less coherent feeling.

Observations revealed variation in the level of stock within retailers, ranging from scarcity to over-abundance, even within the same store. For example, empty displays were observed at Happy: Several shelves were unfilled as if they had not yet been restocked, and a refrigerator case that would normally be used to display meat carcasses contained no meat. Conversely, at Coop, neatly arranged products sat on full shelves, while surplus food products were stacked in shopping baskets, left sitting in front of shelf displays in the snacks aisle. At Spinneys, products hanging on both sides of a passage made it impossible for two customers to pass simultaneously without turning to their sides. At Rammal, nearly every surface in the store seemed to be utilized – shelves surrounded pillars, boxes were stacked along staircases – maximizing the amount of product that could be offered to customers; elsewhere in the store, however, some shelves were not fully stocked.

Observations revealed several additional points of comparison regarding organization and display within the stores. For example, the display of pork products and alcohol varied subtly among those retailers who offered the products. At Carrefour, while pork products were displayed on the same shelf or in the same case as other meat products, the alcoholic beverages were located in a single area of the store that could have been avoided by customers who choose not to buy such products. Spinneys displayed alcoholic beverages in two locations – on a promotional shelf located directly to the left of the store entry, and in a separate room accessed from the basement level, which contained only alcoholic beverages and which shoppers could easily avoid if desired. This suggests that Carrefour and Spinneys have, to some extent, adapted their display to the sensibilities of local, religiously observant customers. Happy, however, placed most of its stock of alcoholic beverages prominently on a full-height shelf facing the entrance to the store.

Another point of contrast was the use of dedicated and branded units or shelves to display the goods of a specific manufacturer. This was most extensively observed at Carrefour (Aruba, Domo, Huggies, L'Oréal, Kellogg's, Maggi, Maybelline, M&Ms, Nutella, Sabor, Ulker) where a remarkable number of in-aisle shelf fronts featured company names, logos, colors, and illuminated lighting. These prominent displays underlined the global nature of Carrefour's supply chain and offer to customers. The use of branding was less at Rammal (Nestlé, Kit Kat, and Ariel), and least at Happy and Spinneys (Wooden Bakery) and Coop (Galaxy). Notably, the display at Coop was branded with Galaxy but the products contained therein were from another manufacturer.

A point of commonality in display was the use of language: All of the retailers visited featured multiple languages in their display – including promotional signs, directional signs, and product and pricing signs – most commonly Arabic and English. A combination of signs were used, some in Arabic, some in English, and sometimes both. Locally owned Rammal appeared to have a higher proportion of its signs and display in Arabic than the other retailers visited. Foreign-owned Carrefour was the only retailer observed to make (very limited) use of French in its display signs.

Store Atmosphere

Store atmosphere refers to the general feeling conveyed by the physical space, organization and display, and other factors such as lighting, music, and odors. Again, variation was observed across the retailers visited.

Carrefour City Mall offered a feeling of spaciousness and order. Displays were well organized and uncrowded. Ample lighting gave the store a bright feeling, despite its location in the interior of a shopping mall; supplemental lights were included in the shelf displays of some aisles. Odors were controlled: There was a smell of detergent near the household cleaners section and a light smell of baking bread near the bakery, but otherwise no strong smell even in areas where one might have been expected (e.g., fresh seafood section). In a very few areas of the store, dirt and debris were seen on the floor, an apparent result of restocking activity, and cracked floor tiles betrayed wear and tear. No music or advertisements were noted during the time of observation. The store was not busy at the time of observation, adding to the sense of calm, even sleepiness. The number of unopened packages in the deli section (e.g., large vacuum-sealed packages of meat and cheese from which smaller cuts could be made) suggested that it was not particularly well frequented. A sparse display of cakes in the back of the store conveyed a sense of emptiness. These observations are consistent with earlier ethnographic analyses of hypermarkets, described as ambivalent spaces between sterility and fertility (Badot, 2005, citing Cochoy, 2005).

The store atmosphere at Coop Hamra was one of a compact, orderly, slightly worn space well attuned to a dense, urban environment. The layout on the ground floor was particularly tight, limiting the ability to move in narrow aisles or past other customers; this feeling was exacerbated by the busy nature of the store, which had a fair number of customers at the time of observation. The high ceiling of the basement level conversely offered a greater sense of space. The store was well lit and in generally good condition despite several broken ceiling tiles and a loud exhaust fan. A peeling, illegible poster was affixed to the staircase leading from the ground floor to the basement. An unlit television displayed over the staircase presented a missed opportunity to share information with shoppers. Smells were observed, including an unpleasant, stale smell at the entry to the basement level; the pleasant smell of detergents in the household cleaners section; and the strong smell of eggs near their display. Dirt and debris were observed on the floor in an interior aisle. Within Coop, Arabic-language music was observed at the ground level but was not playing at the basement level; during the observation, the music stopped and did not resume.

Happy Choueifat offered an atmosphere that was utilitarian, highly stylized, somewhat disordered, but generally pleasant. This began from the parking lot, which was unpaved and un-lined, allowing customers to park in an irregular pattern. The store space was simple and durable with concrete floors, ample recessed lighting, and generally uniform shelves reaching 6-7 feet high. Though the store was busy with customers at the time of observation, some items on display were dusty, suggesting they were not strong sellers. A strong but not unpleasant odor of ripening fruits was noticeable in the FFV section. Music and advertisements played overhead through a sound system, featuring English-language pop songs as well as a British accented voice reading the Happy advertisements. A cold case in the back of the store hummed loudly. Several air conditioning units were affixed high to the walls of the store and near the entrance/exit, but were not operational at the time of observation (a cool day). Several features of the display – the use of cardboard boxes on the shelves, the use of metal cages with piled materials for some displays, and a

lack of stock on some shelves after customers have removed products (e.g., a nearly empty display of Arabic bread) – lent a feeling of disorganization to the store. Excess packaging and waste material were in some areas left on the shelves or in large metal cages in the middle of aisles serving as trashcans.

Rammal similarly conveyed a feeling of slightly disordered activity, friendliness, and abundance in a well-trafficked space. The areas of the store dedicated to food and household cleaning items were busy with customers at the time of observation; areas displaying household tools and clothing were notably less busy. Loud conversations were overhead between employees moving about their tasks or interacting with customers. The store was in moderate condition, demonstrating some signs of wear and tear (e.g., flickering overhead lights). In several areas of the store, odors were observed though these were not necessarily unpleasant: The smell of pickles was present near the counter selling mouneh while the smell of detergents was observed in the household cleaners section. No smell, either good or bad, was observed in the FFV section. Despite the large physical size of the store, the feeling was not one of spaciousness. The physical space was divided into sections by walls, pillars, and shelves. There was no obvious, logical, linear flow through the space for a customer unfamiliar with shopping there. The store was generally clean. In some areas, debris or discarded packaging was on the floor – fallen leaves in the FFV section, abandoned packaging in the candy aisle. Water was puddled on the floor near cold cases. While no music played within the store, at the first floor level an overhead speaker played Koranic (Islamic religious) chants.

Spinneys's Hamra location offered a sense of abundance, but in a cramped and warren-like environment. A continuous flow of customers moved among shelves, cold cases, and other displays that were full and orderly. The circular flow of the store contributed to the unusual atmosphere: Customers could descend the main staircase from the basement level and return via a circuitous route that moves through the store and up two ramps. Ceilings on the basement level were low, particularly within the FFV section, and wires dropped through gaps in the tiles in one area. The underground location featured no windows, but lighting kept the space bright. The smell varied from unremarkable or even pleasant (soaps and detergents) to unpleasant in one area of the store. English-language pop music and English-accented in-store advertisements helped to lighten the atmosphere. Conversely, obvious security cameras, flashing red lights affixed to store walls, and a gently beeping alarm contributed to a sense of surveillance and unease.

Customer Orientation

While the target customer of each retailer was not possible to determine strictly based on store observations, several retailers revealed possible clues about their customer orientation. Each retailer is presented in turn.

Carrefour's location within a mall reflected a possible orientation to families or those who shop for food as part of a wider shopping agenda. Carrefour offered a notably wide array of products that suggest they are oriented to families (children's clothing, baby supplies). Clothing on offer was Western in style, which may also reflect the orientation of the store's customers. The presence of signs promoting price advantages suggested that Carrefour targets customers attuned to price considerations. The wide use of English in its signage suggested an orientation to Anglophones, possibly including more educated customers or immigrants who do not speak Arabic; this hypothesis is reinforced by the limited use of French language in-store.

At Coop, the availability of larger or value sizes of selected products and the presence of a promotional section potentially targeted customers attuned to price or value considerations. Arabic language music suggested an orientation to Arabophone customers.

Several factors suggest that Happy has focused its offer on a Western-oriented consumer, including product assortment (inclusive of pork products and alcoholic beverages), mixed Arabic- and English-language signage, English-language pop music, and the use of photographs in some marketing materials that feature white children wearing Western clothing. The store's focus on low prices and restricted choice further suggested that it is oriented to cost-conscious consumers.

Spinneys' orientation seemed closest to that of Happy, though with an emphasis on value rather than low prices. This observation is perhaps reflective of the fact that Spinneys and Happy are two retailer chains under the control of the same owner.

There were multiple indications that Rammal is oriented towards families. Two coin-operated dispensers of children's toys are located at the entrance to the store (one outside, one inside). A large children's toy section is located on the basement level. The clothing selection available for sale may also offer clues to its (possibly inconsistent) customer orientation: A shelf displayed headscarves for women in a range of colors, though a nearby hanging rack displayed short skirts for women and girls. The playing of Koranic chants within a portion of the store further suggests that Rammal may cater to a more religiously observant segment of the population.

Discussion

Comparison of the Value Propositions of Modern Format Food Retailers

Structured observations and their analysis reveal several key points of comparison and distinction among modern food retailers spanning format types (hypermarket, supermarket, and discount store) and ownership origins (international and local). Firsthand observation confirms limited diversity of offer within Lebanon's modern-format food retailers, with variation clearest in terms of product assortment, organization and display, and store atmosphere.

Variety in product assortment was evident in terms of non-food products: Larger format stores in suburban locations offered more non-food products, while urban locations had a greater emphasis on food products, presumably because of their more limited surface areas. Across food products, Carrefour hypermarket stood out in that its offer had subsumed traditional retailers – a bakery, roastery, and fishmonger – beyond that observed for any other format type, offering more within its one-stop shopping than other formats. Another notable point of distinction falls along the international-local divide, as only international firms offered for sale pork and alcohol products. Within food categories, fewer distinctions were observed. Given the international status of Carrefour, the general lack of exotic, exceptional, or hard-to-find products was remarkable: Few items were uniquely available at Carrefour that could not be found at other retailers.

Variation in organization and display was noticeable and suggested that this might serve as a basis for retailers to typify their offer: Carrefour's spacious, orderly offer stood in clear contrast to the crowded, bustling, disordered offer of Rammal and Spinneys. Evidence is mixed as to whether crowding negatively influences consumers' shopping satisfaction (Grewal et al., 2003), or whether consumers in the MENA

region may prefer a more crowded environment (Seock & Lin, 2011). As for the organization of stores, earlier research found that Wal-Mart strategically used stock-outs and a degree of disorder to underline its popular, approachable, and low-cost positioning in the market (Badot, 2005; Badot & Paché, 2005). Whether this variation in store format intentionally and accurately reflects the business strategy (Aranda et al., 2018; Reynolds et al., 2007) of these Lebanese retailers observed is unclear; inquiry targeting retail managers could address this gap in future. As for displays, the use of industrial-style shelves and pallets to present goods to consumers and even organize the store was observed with varying intensity. The extent to which this represents a deliberate choice to reinforce the elimination of intermediaries (and thus lower transaction costs and reduced prices for consumers) (Badot, 2005; Badot & Paché, 2005), or is simply a reflection of store managers making use of available or cost-effective materials, requires verification with retail managers.

Similarly, differences in store atmosphere were noted via observation. The bright, ordered, spacious, and sterile offer of Carrefour stood in contrast to the abundant, crowded or cramped, worn or dirty, but friendly offer at Rammal, Coop, and Spinneys. If reflective of a strategic choice (as opposed to ineffective management of staff and facilities), the latter atmosphere would not be without precedent as a means to convey a good value offer to shoppers (Badot, 2005). The use of lighting, color, and audio announcements, which may influence consumer choice of products (Grewal et al., 2003), was more evident in foreign retailers (notably Happy). Conversely, music was observed in several retailers, foreign and local alike; this may reflect another strategic choice, insofar as music has been shown to affect consumers' responses to retail environments, typically in a positive manner (Grewal et al., 2003). Store environments affect consumers' perceptions of value and their store patronage intentions (Grewal et al., 2003; Pan & Zinkhan, 2006), though how and to what extent this holds for Lebanese consumers – or is actualized by food retailers – remains to be determined. Therefore, future research could usefully assess store atmosphere vis-à-vis retailers' respective business strategies and target customer orientation, as well as consumers' shopping preferences.

Elsewhere, several points of non-distinction or convergence deserve mention. First, the general lack of point of origin marketing on specific food products – particularly by foreign-owned food retailers – is perhaps unexpected, and may reflect that retailers in Lebanon are not pursuing this as a business strategy. In other developing countries, point of origin marketing may offer a retail strategy to take advantage of a perceived strength of international food retailers, particularly those originating in developed countries such as in Europe. Previous research has found that consumers in emerging countries prefer imports from developed foreign countries (Ger, 1999), which serve to enhance self-esteem, social status, and pride of ownership, as these products are often more expensive and exclusive than local goods (Rodrigo et al., 2019). However, without direct validation of retail managers, it is unclear if the lack of point of origin marketing is intentional or whether it has been subsumed within a broader attempt to market the entire retailer as international, as might be the case for Carrefour. Moreover, in a small country like Lebanon where a majority of all food is imported (Abou Zaki, 2020; Ianchovichina et al., 2014), an international point of origin might simply be less of a meaningful distinction between retailers. This question remains subject to future research.

Similarly, the general lack of emphasis on hygiene and food safety is surprising, insofar as this has proven an important point of advantage in the development of modern food retail in other developing countries, for example Vietnam (Hai Tran & Sirieix, 2020). The fact that all retailers observed are modern format could explain limited variation between retailers; however, this does not appear to explain their convergence towards the generally low standards in evidence. Indeed, elsewhere, the supermarketization process has seen modern food retailers adopt private standards that fill the gap when public standards are weak or absent, delivering higher quality to consumers as they gain increased power over the food supply chain (Lawrence & Dixon, 2015). The reason for which modern food retailers – and particularly international retailers – do not appear to emphasize hygiene and food safety is an area for further research.

Evidence of Food Retail Transformation and Hybridization in Lebanon

This research presents evidence to suggest that food retailers in Lebanon operate consistently with the theory of the Big Middle, offering largely consistent formats to satisfy the highest number of consumers. The trickle-down movement emphasizing prices is more evident as a strategy to reach a wider customer base. Structured observation reveals more focus on competitive prices than assortment, with the exception of Carrefour hypermarket. The introduction of Happy – a sister company to Spinneys – particularly demonstrates the emphasis on price competition to gain market share. Conversely, Carrefour's more expansive, polished offer may not resonate with the Big Middle of Lebanese consumers, extrapolating from the relative lack of crowds during the structured observation. While Carrefour's lack of customers could potentially signal the decline of the hypermarket as has been reported in other markets (Montagnac, 2022), a single observation is insufficient to make a robust diagnosis.

This research also provides evidence that modern format food retailers with international operations may be importing formats and practices, thereby shaping the offer (and expectations) of local consumers. Carrefour presents an offer that is visually very similar to the hypermarkets present in Europe, inclusive of products and brands that may be sourced from throughout Carrefour's international operations. Similarly, Happy now offers the discount format to the Lebanese market, trading a restricted assortment (albeit inclusive of imported, European food and beverages) for competitive prices. As for practices, all modern format retailers offer own-brand products, most often closely tied to the retailer name or identify; while it is not known which retailer first introduced own-brands to the market, this is consistent with global observations. In other markets, this own-brand offering has been observed to deliver high-quality, price competitive goods (Lawrence & Dixon, 2015) and thereby shift consumer perceptions and choices in favor of store brands and away from major labels (Dawson, 2013).

This research simultaneously provides evidence of adaptation of modern format retail to succeed within the Lebanese context, a type of hybridization that Goldman (1974a, 1975-1976; & Qin, 1998) might have predicted. Cultural adaptation is evident in the assortment of foods available, as imported items are sold alongside local staples (Arabic bread, mouneh, roast nuts, grilled meats and kebabs) that might otherwise be found in traditional format retailers such as bakeries and specialty shops. This variation in product assortment is consistent with observations from other developing countries, where modern format retailers now offer and even freshly prepare local foods in their stores (Dholakia et al., 2012). Physical

adaptation is also noted: Modern-format retailers like Coop and Spinneys have folded their large-format to fit into the atypical, limited spaces available to them in densely populated areas such as Beirut.

Of particular interest to the question of hybridization is the recently introduced discount store model within Lebanon's food retail landscape. Direct observation suggests that Happy discount store generally conforms to the model established in western markets since the 1950s: Discount stores deliver lower prices by limiting the product assortment, featuring private-label or store-brands, and offering lower costs than supermarkets (Colla, 2003). The presence of specific imported food items (Caen-style canned tripe, Normandy-style cider) suggests that supply chain efficiencies have been prioritized over a modified product assortment suited to local tastes. However, the discount store observed made extensive use of branding and decoration and did not unduly scrimp on staff, suggesting that the Happy discount store chain has adapted this formula to align with local consumer preferences. Colla (2003) suggests that the long-term success of Happy and its continuation in the Lebanese retail environment could depend on supply-side factors such as purchasing power, experience in own-label management, expertise in fresh produce, and sales and purchasing synergies with other retailing formats in the same group (i.e., Spinneys and its network).

Hybridization is not only limited to foreign retailers, but is revealed in local retailers that have evolved their (formerly traditional) offer to approach the offer of modern retail. Most notably, local supermarket Rammal expanded from its original business model focused on grains and cleaning products to cover the wide product assortment typical of supermarkets. This observation is consistent earlier research that focused on the hybrid forms adopted by endogenous retailers as a strategy to compete with foreign competitors (Goldman, 1974a, 1974b, 1975-1976).

Does this research provide any evidence that competition beyond assortment and price is driving food retail transformation in Lebanon? Variation in store atmosphere suggests that modern format retailers indeed consider socio-cultural factors to orient their offer to customers and gain or retain market share. Through its branding, Carrefour promises a metropolitan French shopping experience for consumers. Spinneys and Happy use western imagery, music, and voices within their stores and marketing materials. These cues offered by international modern format retailers may reinforce the identity-building project of those Anglophone and Francophone customers who envision themselves as more closely aligned with Europe than the rest of the Middle East. These retailers may thereby be positioning themselves as symbolic destinations, providing a social classification for shoppers, as has been reported elsewhere in the MENA region (Amine & Lazzaoui, 2011). Local retailers Coop and Rammal may conversely may use Arabic language, music, and even prayers to convey their values and offer (halal products only) especially to Muslim customers. These approaches may reflect a strategic attempt to provide local consumers an authentic and locally-rooted experience, and thereby compete with foreign retailers as recommended by Ger (1999). If so, such a strategy could be a novelty in the MENA region, where religiosity and demand for halal foods has led consumers to favor traditional food retailers (Heiman et al., 2019; Hino, 2010; Hino, 2015). However, observation of retailers' offer does not allow us to assess definitively how consumers interpret and consume retail formats; a direct assessment of consumer perceptions of both modern and traditional retailers' competing offers is therefore necessary. Whether modern format food retailers suit the food shopping culture and preferences of most consumers better than traditional retailers, and how

consumers animate the cultural resources provided by retailers, requires further exploration. Future research to include customer observation, accompanied shopping, and in-depth interviews with consumers could usefully explore how they read and act upon signs and signals provided by retailers (Dawson, 2013).

To paraphrase Dholakia et al. (2012), it seems likely that the adaptive strategies of food retailers – modern and traditional – will play an important role in shaping Lebanon's retail landscape into the future. The monitoring of these adaptive approaches will be of interest for not only researchers, but also retail managers.

Theoretical Implications

This work builds on earlier research on internationalization, glocalization, and hybridization by applying these concepts to the context of food retail in Lebanon, and offers an example of these processes with an ultimate goal of contributing to the wider understanding of the complexity of global flows (in this case, focused on the flows of food retail formats).

The evidence presented above shows that modern food retailers in Lebanon vary in their offer to customers, spanning from the classic marketing aspects of product assortment and price and extending into more customer-centric aspects observable within the store environment. Variation in store environments is not only imposed by largely exogenous conditions – such as store locations and layouts dictated by established urban landscapes – but clearly a result of retailers' choices in terms of organization and display, company brand signals, and store atmosphere. This article therefore aligns with a socio-cultural reading of the Big Middle, influenced by Consumer Culture Theory and its more comprehensive and engaged view of food retailing.

Nevertheless, the evidence presented above suggests that there is a relatively homogeneous offer from the modern format retailers observed, albeit marked with variation that reflects both adaptation to local cultural context as well as a means for retailers to distinguish themselves within a crowded competitive marketplace. Stated differently, there appears to be a convergence in this hybridization and more 'global' than 'local' within the modern food retail segment in Lebanon, based on the observations of store environments completed within this study. To what extent this is a result of the retailers chosen for visits, and the extended period of operation in Lebanon and thus opportunities to conform, is an area for further consideration.

The evidence presented in this article suggests that modern food retailers in Lebanon indeed reflect a movement towards the Big Middle, while adjusting their offer marginally as predicted by Consumer Culture Theory. The relative homogeneity of the offer does not offer conclusive evidence of the development of new formats within modern retail, or to support the prediction of Herbert et al. (2018) that the retail landscape will become increasingly fragmented as retailers adjust their formats to align with evolving consumer preferences.

Managerial Implications

Lebanon's modern food retailers compete against not only traditional food retailers but also each other. Analysis of the competitive landscape can therefore be useful to inform and refine their offer to customers in terms of product assortment, prices, as well as socio-cultural resources such as store atmosphere that

are largely under the control of managers (Grewal et al., 2003; Seock & Lin, 2011). With regards to store atmosphere, retail managers can target the visual and auditory environment to improve customer experience and influence the choice of products (Grewal et al., 2003). By enhancing their offer, retail managers may deliver a satisfactory retail experience, which has been shown to increase consumers' attitudinal and behavioral loyalty (Paul et al., 2016). Alignment of the store environment with the retailer's offer has been highlighted as a means to improve customer satisfaction and loyalty (Grosso et al., 2018), and investment to improve store retail environments has been positively correlated with increased sales (Seock & Lin, 2011). For example, research from emerging markets has also shown the strong influence of image factors on consumers' purchase intentions, including for higher-margin own-label products (Diallo, 2012). This analysis of the competitive landscape may be particularly important as Lebanon emerges from its economic contraction, per capita (food) spending once again increases, and retailers have a growing incentive to strengthen their competitive positions to benefit from rising sales (Dawson, 2013).

Another implication for management is the issue of physical accessibility of retailers, which was markedly lacking in several of the retailers observed in this study. Physical accessibility to and within food retail outlets is a topic rarely raised in the academic literature from developing country contexts. This observed gap could present an opportunity for retailers to invest in their outlets or expand delivery services to reach underserved customers. Underserved customers may include the estimated 10-15% of consumers in Lebanon who have physical or other disabilities. This could be particularly important in improving food accessibility and food security for populations who are more likely to suffer from physical disabilities, such as elderly women (Combaz, 2018) and vulnerable refugee populations (Salti et al., 2013).

Limitations and Future Research Directions

As all research, this study is subject to limitations. The study is based on a small number of observations,[56] which offer a view comparable to that seen by the average consumer, conducted at a specific moment in time; it excludes information on retailer operations that distinguish their offer but which are internal and thus not visible to consumers. All observations are limited to modern-format food retailers operating in and around Beirut. Future research could expand the number of observations to include more retailers and of additional formats, including traditional and e-retailers, and with greater emphasis on the factors that have been identified elsewhere as a competitive advantage for traditional retailers in developing countries, such as quality of customer service (Chaniago, 2020; De Silva Kanakaratne et al., 2020; Dholakia et al., 2012). Future research could also usefully record changes in the food environment in response to shocks including COVID-19 and Lebanon's ongoing economic crisis, allowing for chronological comparisons of the evolution of the food retail environment. Beyond this, future research could draw on expanding technology and data analytics from across retailers to more deeply assess the competitive landscape and help retailers to pivot from a product-oriented to a customer-oriented focus that may be necessarily for future retail success in developing countries like Lebanon (Gupta & Ramachandran, 2021).

This research is the work of a single researcher, which has also imposed limitations. The small size of the research team limited the ability to cross-check analytical themes derived from the retailer observations

[56] In their critical review of structured observation studies, Martinko and Gardner (1985) criticize such studies generally for their limited sample sizes, which precludes formal statistical analysis and limits valid comparisons.

(Miles et al., 2014). In addition, this work has not been subject to external validation through either a comparison to consumer attitudes and behaviors or the strategic (or not) decisions of retail managers. This remains an area for future research, for example to ensure that store environments are not interpreted as reflective of retailers' strategic and tactical decisions when this is not the case.

Conclusions

Through the lens of glocalization and hybridization, this observation-based study offers a more detailed view and exploration of differences and commonalities in the offer of selected modern retailers (hypermarket, supermarkets, discount store) to consumers in Lebanon. This study reveals that modern format retailers are aligned but non-monolithic in their value proposition to the customer: They generally have assortment in common and offer the convenience of one-stop shopping in a larger format, but their offers nevertheless reflect some variation particularly with regards to store environment. In this way, the research is consistent with earlier research that identifies the store environment as a key factor for modern format retailers to distinguish themselves and compete for market share (Goldman, 1975-1976). Whether these store environments are optimally suited to Lebanon's cultural context, and whether the current store environments will therefore support the continued penetration of international food retailers (De Silva Kanakaratne et al., 2020), is an area for future research.

This research also contributes a micro-level view of the food retailing environment in Lebanon at a unique point in time: after the outbreak of the Lebanese revolution in October 2019, before the introduction of strict COVID-19 lockdown measures in the country in mid-March 2020, and before the worst of the country's ongoing economic crisis. In this way, the current article acts as a snapshot of the Lebanese food environment, which could serve as a basis of comparison in reference to future observations of modern format retailers.

This study has implications for academia, management, and policy makers. This research has critically examined the offer of modern food retailers through the lens of glocalization and hybridization, helping to address gaps in the literature. By presenting a detailed view of the modern food retail landscape, the study offers a glimpse of the food retail environment that can inform future research on the supermarketization process in Lebanon. This information can also be useful to food retail managers, as they seek to navigate Lebanon's evolving food landscape and occupy profitable segments thereof. For policy makers, the study reveals features of the food environment that may be relevant for future public action, for example related to food safety and hygiene (e.g., in light of social distancing requirements linked to communicable diseases such as COVID-19) or to longer-term challenges including food consumption patterns and rapid increases in diet-related non-communicable diseases.

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Annex 1: Observation Guide

Physical Space

- Layout and organization – aisles, bins, shelves, etc.
- Display – full shelves, organized or messy
- Smells
- Sounds – music, voices/conversation
- Lights
- Temperature throughout the space
- Physical accessibility

Product Range

- Categories
- Abundance
- Brands versus non-branded
- Origin, language of products (labels, signs)

Employees

- Number
- Languages used
- Origin (if possible to determine)

Clientele

- Number
- Interactions with employees
- Language on signs
- Signs indicating participation in World Food Programme food voucher program for vulnerable households
- Age
- Gender
- Outward signs of religious affiliation (if possible to determine)

Annex 2: Categories/Codes for Analysis

Category	Sub-Category	Codes
Physical Space	Store Location	Urban, Suburban
		Co-Location, Standalone
	Store Size	Checkout Counters
	Store Layout	Floors / Levels
		Aisles
	Physical Accessibility	Entryway, Turnstile
		Stairs, Escalator, Elevator
		Shelf Height
Product Assortment	Food Products	Non-Perishable, Perishable, Specialty
	Non-Food Products	
	Brands	Local, Regional, International
		Store Brands
	Product Sizes	Family Sizes / Packs
Hygiene & Food Safety		Protective Equipment for Staff
		Glass Barriers
		Signs for Hygiene Practices
Customer Service	Convenience	Self-Service, Full-Service
		Price Checker / Scanner
		Trolleys, Baskets
		Parking
		Loyalty Program
		Customer Service Desk
		Restrooms
Employees & Employee Interaction		Present, Absent
		Local, Foreign
		Language (Arabic, other)
		Friendly, Disengaged
		Busy, Idle
		Uniform / Name Tag
Organization & Display		Ordered, Disordered
		Legible, Illegible
		Language (Arabic, English, French)
		Branded Shelves
		Shelving Materials
Pricing		Price Advantage
		Promotional Items
		Price Tags / Signs
		Value Packs
		Cash Back
Company Branding		Trolleys
		Signs
Store Atmosphere		Spaciousness / Crowding
		Lighting
		Smell / Odor
		Abundance, Scarcity
		Sound & Music
		Busy, Empty
		Clean, Dirty
		Good, Broken Conditions
		Temperature
Customer Orientation		Men, Women
		Family / Children
		Secular, Religious
		Language (Arabic, English, French)
		Halal, Prohibited Items (Alcohol, Pork)

Food Shopping in Crisis: The Combined Effects of Revolution, Economic Collapse, and COVID-19 on Food Shopping Behaviors and Attitudes in Lebanon

Abstract

Theoretical Background: The supermarketization phenomenon has been situated in a context of globalization, supported by the growth of developing countries marked by rising incomes among particularly middle-class consumers. Theories of retail transformation argue that the evolution of retail formats – such as modern food retail – are a function of their attempts to capture the "Big Middle" of consumers through a combination of product assortment and attractive pricing. A socio-cultural reading of the "Big Middle," rooted in a cultural understanding of markets, argues that retail success also depends on their ability to deliver socio-cultural value and meaning making to consumers, thus setting as an objective to understand how consumers perceive and make meaning of the offer provided by (modern food) retailers.

Contextual Background: The literature on supermarketization assumes a context of generally steady development. The impact of crisis or shock on the supermarketization process and the relationship between modern food retailers and consumers is far less studied; available studies tend to be quantitative and to overlook the phenomenology of experiencing and reacting to crisis. This gap is particularly important to understand in light of recent, significant crises that have affected food systems. Globally, COVID-19 is acknowledged to have had significant effects on consumers' food shopping behaviors and, by extension, food retail, for example a sustained shift to online food purchases and e-commerce retailers. In Lebanon, the context for the current study, additional political and economic crises have occurred nearly simultaneously with the COVID-19 pandemic. Whether and to what extent crises have triggered changes in food shopping behaviors and attitudes, and the implications for the process of supermarketization and retail modernization in developing country contexts such as Lebanon, are unexplored areas of the literature.

Objective: This research seeks to understand the role that supermarkets play for Lebanese consumers before and during a period of overlapping crises (COVID-19, political revolution, and economic collapse) and to deduce the potential implications for the longer-term process of supermarketization in the country. The intended contribution of this study is to identify any early indications of long-term changes in food shopping patterns that may affect the food retail sector and thus the structure of the food retail environment and wider food system in Lebanon.

Research Design and Methods: This study applied qualitative methods, collecting information through the conduct of 20 in-depth semi-structured interviews with adults (18+) residing in Lebanon who hold responsibility for food shopping for themselves and/or their households. Data were collected using remote technologies (phone, WebEx, Zoom) in line with social distancing requirements suitable to the

COVID-19 context. Data analysis was undertaken concurrently with data collection, and included preparation of interview notes, transcription, coding, and thematic analysis.

Results: Lebanese consumers are found to exhibit cross-shopping patterns, relying on a combination of modern and traditional retail formats to satisfy their food needs. An array of factors influence their choice of food shopping destination, ranging from those identified in mainstream retail theories (price, product assortment) to the individual-level activation of meaning and identity creation described within CCT. Recent shifts in retail patronage patterns are linked to specific crisis impacts, including road closures, rising health concerns, and rapid inflation in food prices. These shifts, including a greater reliance on delivery services, are not found uniformly to favor modern or traditional retailers, suggesting ambiguous impacts on the future trajectory of supermarketization in Lebanon.

Contribution: This article contributes to a limited literature that explores the impact of crisis on food retail environments and food retail transformation. While the supermarketization phenomenon is generally studied in a context of economic growth, this study situates its examination in the unique context of Lebanon's overlapping political, public health, and economic crises. Moreover, this article addresses perceived gaps in the literature by applying qualitative methods to explore the phenomenology of crisis in Lebanon, and specifically how crisis has affected the interaction of retailers and consumers and consumers' activation of the comparative resources that modern and traditional retailers offer.

Keywords: supermarketization; food retail; crisis; COVID-19; qualitative study; case study

Introduction

Globally, food retail is changing. The number and market share of modern-format supermarkets in developing countries have increased significantly in recent decades, a process known as supermarketization (Dries et al., 2004; T. Reardon et al., 2009; Reardon et al., 2003). The supermarketization phenomenon has been situated in a context of globalization, supported by the growth of developing countries marked by rising incomes among particularly middle-class consumers (Reardon et al., 2003). A range of factors have been identified as possible causes for the growth of supermarkets, including supply- and demand-side factors related to supermarkets and to consumers, respectively. Academic research further shows that the changing food retail environment has implications for agri-food markets and value chains, consumers, and food security.

Several important gaps exist in the literature around food retail transformation. First, the literature on retailing evolution generally has overlooked – and acknowledged the need to understand – the role of the consumer in informing this process (Fuentes & Hagberg, 2013). Second, while it is acknowledged that supermarketization does not occur homogeneously or have uniform effects in developing countries (Tessier et al., 2010: 1417), this phenomenon remains under-studied in many country contexts. For example, the factors driving (or impeding) supermarketization have not been studied in detail within the Lebanese context. This argues for additional case studies to understand the phenomenon of supermarketization in diverse contexts. Third, the COVID-19 pandemic has drawn renewed attention to the question of how crises influence food systems, including food retail and its transformation, and the need for further research in this area (Leone et al., 2020; Ntontis et al., 2022; Thompson et al., 2022).

This research seeks to understand how the retail landscape offers resources to consumers in times of crisis, distinguishing between modern and traditional retailers to make this salient. The specific research questions that have been explored are as follows:

- What are the food shopping behaviors and attitudes of consumers in Lebanon (including vis-à-vis modern and traditional retailers)?
- How have the combined crises affected food shopping behaviors and attitudes towards retailers among consumers in Lebanon?
- How might the combined crises thereby affect the process of supermarketization in Lebanon?

To achieve this, we examine Lebanese consumers' food shopping attitudes and behaviors, the impact of recent crises on this, and the potential implications for the longer-term process of supermarketization in the country. Qualitative methods and individual accounts are useful to explore a range of experiences, understandings, and reactions to crisis.

This article proceeds as follows. First, a literature review presents major theoretical foundations on which this research builds. Then, a brief presentation of the study context and methodology follow. Key results are presented and then discussed. Conclusions conclude.

Literature Review: Conceptual Foundations

The Big Middle & Its Socio-Cultural Reading

The Big Middle is a leading market-based framework to understand retail evolution, specifically in terms of offerings and cost (Levy et al., 2005). While the Big Middle framework was conceptualized based on evidence from the United States (Levy et al., 2005), it has been applied to other regions and market types, for example analysis of supermarketization in Thailand (Gorton et al., 2011) and of Brazil's apparel sector (Miotto & Parente, 2015). The Big Middle is "the marketspace in which the largest retailers compete in the long run, because there is where the largest number of potential customers reside" (Levy et al., 2005: p. 85). Successful retailers are drawn to the Big Middle in pursuit of economies of scale, higher revenues, and incremental profits. Within this framework, retailers typically enter the market as low-price retailers or as innovators before migrating to the Big Middle: Low-price retailers initially focus on price-oriented market segments, while innovative retailers initially focus on quality-oriented market segments. Of these two archetypal business models, the former "enrich the value proposition to gain in attractiveness" (trading up); the latter "optimize resources and competences to gain in efficiency" (trickle down) (Volle et al., 2008: pp. 135 & 139). Retailers in the Big Middle thereby evolve from their initial niche to a hybrid position offering innovation and low prices and thereby satisfying a mass market or large market segment (Levy et al., 2005). Intense competition is underlying evolutionary force within the Big Middle, driving retailers to maintain their value proposition, often by developing new organizational structures and investing in fixed assets oriented towards a volume-based retail model (Levy et al., 2005). For other scholars such as Brown et al. (2005), success in the Big Middle is a function not only of supply chain efficiency and appeal to a range of customers; success within the Big Middle also depends on geographic, technological, and socioeconomic changes to the retail environment. Shifting environmental conditions influence retail evolution, as perceptive actors respond by developing alternative methods of selling goods and services. "Retail institutional change, in other words, is the outcome of external environmental influences and a cycle-like sequence of internal conflict" (Brown, 1987: 28). In this way, shocks to the business environment – whether global or local – may disrupt the balance of power and provoke changes in retailing formats. The role of shocks such as crises in shifting consumer perceptions and expectations and thus repositioning the location of the Big Middle, with implications for the attractiveness of existing retailers, appears to be a gap in the literature.

A socio-cultural reading of the Big Middle framework argues that retailers provide more than goods and services to consumers; they offer a range of cultural (economic, utopian, ludic, and temporal) resources (Arnould, 2005; Arnould & Thompson, 2005; Badot & Paché, 2005). Through the lens of Consumer Culture Theory (CCT), which views consumption as an inherently communicative and symbolic behavior that creates and expresses meaning (Ger, 1999; Wilk, 1998), "Retailers compete to provide the most compelling array of cultural resources to consumers, not merely lower prices or better assortments" (Arnould, 2005: p. 91). Through their assortment function – which consists of filtering, arranging, promoting (Hirschman & Stampfl, 1980) and influencing producers' offerings and creating their own ones (Hirschman, 1981) – Big Middle retailers forge and shape symbols of popular culture. Assortments are only part of the resources that retailers propose to consumers: Their retailing formats, where people shop and with which people interact, and the symbols they carry are also part of the offering (Arnould, 2005). CCT conceives of shopping for goods as a "social activity built around social exchange as well as simple

commodity exchange" (Shields, 1992: 101), rooted in the historic marketplace that served as a place to meet, communicate, and exchange (Shields, 1992). Accordingly, CCT argues that the interaction between consumer and (food) retailer is much more involved and merits significantly deeper exploration (Arnould & Thompson, 2008) than has traditionally been achieved using supply and demand models or consumer choice approaches. This perspective stresses "the negotiated nature of consumption, emphasizing its importance in the construction of identity . . [as] shopping is an elaborate sociological 'game' played out in sites loaded with meaning" (Williams et al., 2001: 203-204). Research under CCT therefore brings to the fore an exploration of the non-rational, non-functional, and cultural element of sociality that is embedded in shopping (Shields, 1992). Therefore, evolution within the retail space is not the result of firm competition but rather is a result of changes in the combination of cultural resources that firms produce and that consumers prefer (Arnould, 2005).

Despite this well-established scholarship, gaps remain within the retailing literature. Issues such as the socio-cultural aspects of retailing have been under-explored (Fuentes & Hagberg, 2013), including "the role of consumers in influencing the path of change" within a retail evolution, and deserve further study (McArthur et al., 2016: 282). In addition, scholars have noted the need to broaden the study of retail marketing through the study of previously ignored retail settings (Fuentes & Hagberg, 2013), which might be understood to include developing country contexts.

Crisis, Retail Transformation, and Food Retail

The academic literature offers some insights into the theoretical and empirical impacts of diverse crises on retailing, including food retail. More recently, studies of the COVID-19 pandemic have explored more immediate impacts on consumers' food behaviors, with some speculation as to the resulting impacts of this crisis on food retail and food systems. These are briefly reviewed here.

Economic Crisis and Retail Transformation

Despite a vast literature on consumer behaviors, few studies explore consumer behavior during economic crisis (Kaytaz & Gul, 2014). Several academic studies have documented the impacts of economic crisis on food shopping behaviors and attitudes in diverse country contexts (e.g., Ang et al., 2000; Ben Hassen et al., 2022; Mathur et al., 2003; Zurawicki & Braidot, 2005). Reductions in income and purchasing power have been shown to reduce the total volume of food purchases and to influence the composition of those purchases by shifting to lower-cost foods (McKenzie & Schargrodsky, 2011), for example by reducing purchases of higher-cost foods such as animal-based proteins (Rabadán et al., 2020). Consumers have also been found to avoid non-essential purchases to control food expenditures in response to economic crisis (Basen, 2014).

More broadly, economic crisis has arguably played a role in driving forward retail change and innovation. Crisis may prompt firms and entrepreneurs to innovate, develop new products and services, and change or pivot their business models in a bid to exploit new opportunities (Manolova et al., 2020; Portuguez Castro & Gómez Zermeño, 2021). For example, Brown (1987) highlights how economic crisis helped to trigger the emergence of lower-price retail formats. "The economic recession of recent years, coupled with rampant inflation, periodic energy crises, the availability of both aging shopping centres and manufacturers with a backlog of unsold inventory, and, moreover, well-educated, price-sensitive

consumers who were prepared to sacrifice selection but not quality, has also given rise to a new retail phenomenon — "off-price" shops and shopping centres" (Brown, 1987: 6). Researchers writing in the years following the Great Recession and extensive economic contraction similarly highlighted that an economic downturn represents an opportunity for retailers to gain market share and potentially reconstitute the "Big Middle" of the retail landscape. According to Favaro et al. (2009: 66), "Hard times – even a deep recession – can be an opportunity to win the loyalty of more customers, increase productivity, and strengthen market position." In a context of economic contraction, the ability of one retail segment to grow is at the expense of another, presenting a zero-sum situation in terms of market share (Evans, 2011).

That said, not all researchers conclude that economic crisis – or at least, not every crisis – significantly affects the evolutionary process of retail transformation. For example, Evans (2011) predicted that the Great Recession would not shift the course or pace of retail transformation. "The future of retailing will look much like its past: Individual firms will seek out competitive advantages, adjust their merchandising practices, utilize appropriate technologies as they are introduced, look to obtain cost efficiencies, focus on loyal shoppers, strive to be convenient for their shoppers, emphasize value, and otherwise adapt their businesses to reflect changing marketplace conditions. And new retail formats will emerge, mature institutions will reinvent themselves, and some institutions will fade away" (Evans, 2011: 3). In this perspective, economic crisis does not fundamentally alter the interaction between retailers and consumers.

The literature focused on crisis impacts on food retail transformation appears to be limited, raising questions as to whether the crisis-as-change or crisis-as-constancy narrative is more applicable to this market segment. Economic growth and rising per capita incomes have been identified as drivers of the seemingly inevitable supermarketization wave crashing over developing countries and the success of modern format retailers in gaining market share from traditional retailers (Nandonde & Kuada, 2018; Reardon et al., 2003). Inverting this logic would suggest that economic crisis and declining incomes could be as factors to slow the spread of supermarkets and to preserve the market share of traditional retailers. Indeed, in their study from Zimbabwe, Maumbe and Chikoko (2020) focus on supply-side barriers such as investment, infrastructure, and local value chain development to conclude that two decades of macroeconomic hardship have impeded but not halted the entry and growth of supermarkets in that country. In their empirical studies of crisis-affected developing economies, Ang et al. (2000) and Zurawicki and Braidot (2005) found that certain types of modern format retailers benefitted from consumers' limited purchasing power, but offered no comparison of modern and traditional retailers' market share.

COVID-19, Food Shopping Behaviors, and Food Retail

Food shopping behavior has reportedly been subject to significant changes since COVID-19 with regard to the volume, composition, and frequency of food purchases (e.g., Iranmanesh et al., 2022; Loxton et al., 2020), as well as patronage according to store location and retail format (e.g., Thompson et al., 2022).

- Volume: Shortly after the imposition of lockdown measures related to COVID-19, a spike in food retail sales was recorded across countries including France (Fuxa, 2020 March 24), the United Kingdom (Thompson *et al.*, 2022), and the United States (Chenarides *et al.*, 2021; Nielsen, 2020 March 30). Increases reportedly reflected the shift in households' consumption to eat a larger

share of meals at home in light of restaurant and cafeteria closures (BBC World Service, 2020b; Chenarides *et al.*, 2021). Stockpiling or hoarding of goods was also reported (Iranmanesh *et al.*, 2022; Ntontis *et al.*, 2022), with variation across food categories by countries; hoarding has been reported for non-perishable staple foods including pasta, rice, and canned goods as well as luxury items including alcohol, ice cream, peanut butter, and sausages (BBC World Service, 2020b).

- Composition: Early reports speculated that consumers who had reduced the frequency of food shopping had, as a result, favored non-perishable foods and reduced demand for perishable foods including fresh fruits and vegetables and fish (FAO, 2020). Younger consumers were reported to buy larger quantities of staple foods (Boumphrey, 2020). Evidence is not consistent on this point, however: While early evidence from developed countries suggested only a limited change in food consumption patterns across major food groups (Chenarides *et al.*, 2021), case studies from developing countries subsequently confirmed that staple food consumption had risen while fresh food consumption had fallen (Hirvonen *et al.*, 2021).
- Frequency: Consumers were reported to be shopping less frequently, but buying larger quantities per visit (Boumphrey, 2020; Chenarides *et al.*, 2021; Cranfield, 2020; Iranmanesh *et al.*, 2022; Leone *et al.*, 2020; Thompson *et al.*, 2022).
- Store Location: Consumers reportedly favored shopping at food retailers located in proximity to their homes over more distant alternatives in response to restrictions on the distance of permitted movements, as reported in countries including France and the United Kingdom (Fuxa, 2020 March 24; Thompson *et al.*, 2022).
- Retail Format: Consumers reportedly shifted where they purchased food to reduce exposure to COVID-19, with consideration of the size of retail formats and the duration of the shopping trip – an intersection of store size, product assortment, and shopping motivation. Preliminary evidence suggested that consumers had pivoted to smaller convenience stores where they could 'zip in, zip out' and reduce their exposure (Headley, 2020). A study from the MENA region found that consumers avoided modern food retailers that relied heavily on packaged goods, fearing that the packaging could increase the transmission of COVID-19 (Faour-Klingbeil *et al.*, 2021). Industry analysis from the United Kingdom found that growth in sales by online grocery retailers and by corner shops and independent grocers between February and May 2020, outpacing that of larger grocery chains (Butler, 2020, May 27).
- Retail Format – Online: In addition, demand for online grocery sales increased as individuals sought to avoid going into public (Boumphrey, 2020; Chenarides *et al.*, 2021; Cranfield, 2020; Principato *et al.*, 2022). In Lebanon, early evidence suggested that online delivery applications experienced stronger demand for grocery delivery since the national lockdown came into effect, and experts predict that some 30% of this demand may remain in the longer term after the lockdown and social distancing measures are lifted (El Boustani, 2020 April 13). Indeed, historical evidence suggests that a portion of these shoppers will continue to shop online so long as retailers can continue to deliver a satisfactory shopping experience (Nielsen, 2020 March 30),[57] providing credence for the "retail apocalypse" predicted by Helm *et al.* (2020).

[57] "The rise of online, click & collect, frictionless retail and direct-to-consumer (D2C) are accelerated. Retail restrictions in place during the pandemic have fast-tracked the shift to digital distribution. Retail operations and consumer demands will prompt new strategies . . . As the technology gap grows between laggards and adopters,

COVID-19 directly impacted the operations of food retailers and the act of food shopping, as governments imposed measures to control the spread of COVID-19 (Leone et al., 2020). Retail-level measures included limiting the number of customers who may enter the store at one time and requiring customers to wear protective equipment like masks and gloves (Headley, 2020). For example, in Lebanon, a range of modifications to standard food retail operations specifically linked to COVID-19 prevention were observed, particularly in the earliest stages of government mobilization against the pandemic (Table 19). The extent to which different retail formats imposed such requirements – whether to comply with public health regulation or voluntarily – is largely unexplored to date. It is also unclear whether and to what extent retailers have or will maintain these measures over the longer term (Headley, 2020). Lebanese government restrictions on car travel – which temporarily restricted non-essential movement by car or motorcycle to a Monday-Wednesday-Friday or Tuesday-Thursday-Saturday schedule depending on the last digit of the license plate – may also have impacted food shopping behaviors, for example by driving an increase in online food shopping and delivery service.

Table 19. Modification of Lebanese Food Retail Operations due to COVID-19

- Reduction in operating hours to comply with government-imposed curfew (initially 6:00PM-5:00AM daily)
- Reservation of early opening hours for shopping by vulnerable populations (older adults, pregnant women)
- Limits on the number of customers who can enter the store at one time
- Requirement that customers entering store have their temperature taken using infrared thermometers
- Requirement that customers entering store wear masks covering nose and mouth
- Requirement that customers entering store wear gloves
- Requirement that customers entering store pass through a cloud of disinfectant spray
- Provision of hand sanitizer for customers inside the store
- Requirement that customers socially distance, keeping a minimum space between them and employees/other customers
- Posting of signs requesting customers not to touch products that they will not purchase
- Requirement that employees wear personal protective equipment (PPE) (*e.g.*, face shields, masks, gloves)
- Installation of plastic barriers or guards at checkout to separate clerk from customers

Source: Authors' observations

Emerging research suggests that COVID-19 may have provoked persistent, longer-term changes in consumer attitudes and behaviors around food shopping, with significant implications for food environments and food retailers (Cummins et al., 2021; Thompson et al., 2022). Longer-term changes may be attributed not only to the immediate impacts of COVID-19, but also to second-round impacts including unemployment, declining incomes, and reductions in per capita consumption expenditure (Boumphrey, 2020). Euromonitor predicted these impacts to include the predominance of 'value' to the consumer; heightened emphasis on personal health and food waste but declining emphasis on sustainability; and a shift away from highly social locations toward digital solutions. Moreover, "Significant shifts in who is

sales will disproportionately go to the adopters, resulting in a more consolidated retail landscape globally" (Boumphrey, 2020).

shopping and how often implies changes to how retailers and brands market, merchandise and promote" (Boumphrey, 2020).

The scholarship on the impacts of COVID-19 on food systems is rapidly emerging but gaps in the literature remain. The effects of the pandemic on consumer food shopping practices and their implications for food retail environments are not well known (Leone et al., 2020). Moreover, previous studies from crisis contexts such as COVID-19 have predominantly been quantitative while in-depth examinations of the phenomenology of experiencing and reacting to crisis – specifically focusing on food shopping behaviors – is largely missing (Ntontis et al., 2022; Thompson et al., 2022). The impacts of COVID-19 including on food-related behaviors have been shown to vary by region and population segment (Leone et al., 2020; Thompson et al., 2022), implying the need to explore the impacts of COVID-19 in a diversity of settings and across a wider range of consumers. As for the case of Lebanon, limited evidence has been published on the impact of COVID-19 on food shopping behaviors of consumers, for example a recent quantitative study of Lebanese consumers (Ben Hassen et al., 2022). Other analysis from Lebanon is drawn from news reports, for example which acknowledge that supermarket shopping has shifted to include additional safety and hygiene measures, but also less expected changes such as that Lebanese shoppers have become more casual in their attire when shopping ("Covid couture: Lebanon gets comfortable," 2020 April 11).

Questions remain as to whether and how consumers have shifted their shopping destinations, the reasons behind those shifts, and whether or not those shifts will be temporary or more permanent. Moreover, the implications of such behavioral shifts for the food retail landscape and its transformation are an area for further exploration: Have modern retailers been able to out-compete traditional retailers by providing consumers with desired hygiene practices, or by delivering a more competitive digital shopping and delivery service? Alternatively, have the traditional retailers optimized their smaller size and flexibility to deliver greater value to customers in a crisis context?

The notable impacts of the COVID-19 pandemic on the supply side of food retailing are acknowledged as important, but less dominant than demand-side considerations (Cranfield, 2020) and beyond the scope of this study.[58]

Study Context: Crisis in Lebanon

If the "evolution in retailing cannot be properly understood outside of the historical, physical, and social environments in which it takes place" (McArthur et al., 2016: 281), then research should consider retail evolution in a variety of historical, physical, and social contexts. This may be approached via case study examination, as this case study of Lebanon. The context for this research is unique, as it reflects Lebanon's food retail environment near the onset of multiple crises – political, public health, and economic.

[58] For example, disruptions to international trade (*e.g.*, reduced air cargo) initially reduced the variety of products available for sale by food retailers. Experts have predicted a durable shortening of supply chains and relative increase in local or regional products on food retailer shelves, as a result of COVID-19 (BBC World Service, 2020a).

Lebanon is a formerly middle-income country located within the MENA region. As of 2019, the country was home to an estimated 4.8 million residents (Central Administration of Statistics, 2020b). Earlier studies have documented the presence and lagging growth of modern format retail in Lebanon (Seyfert et al., 2014), which still control only a minor share of all food retail sales (Euromonitor International, 2020).

Lebanon's recent history has been marked by overlapping crisis that are political, health-related, and economic in nature. The country's political turmoil notably erupted into revolution and popular protest on October 17, 2019, which (inter alia) triggered temporary road and business closures and disrupted supply chains. The revolution in response to political incompetence and corruption as well as mounting economic pressures led to the resignation of the prime minister and months of deadlock until a new government was formed in early 2020.

Lebanon's challenges were compounded by the COVID-19 pandemic. Lebanon reported its first case of COVID-19 on February 21, 2020. In response to the declaration of the COVID-19 pandemic, the Government of Lebanon declared a national state of mobilization (lockdown) that first went into effect on March 15, 2020 (World Bank, 2021, June 1). The strict lockdown measures closed businesses, schools, and transport (notably the international airport); and restricted movement through a curfew as well as restrictions on vehicle movements according to license plate numbers. These measures were deemed necessary to control the pandemic, and were effective in initially containing the outbreak, but disrupted daily life including food consumption behaviors (Ben Hassen et al., 2022).

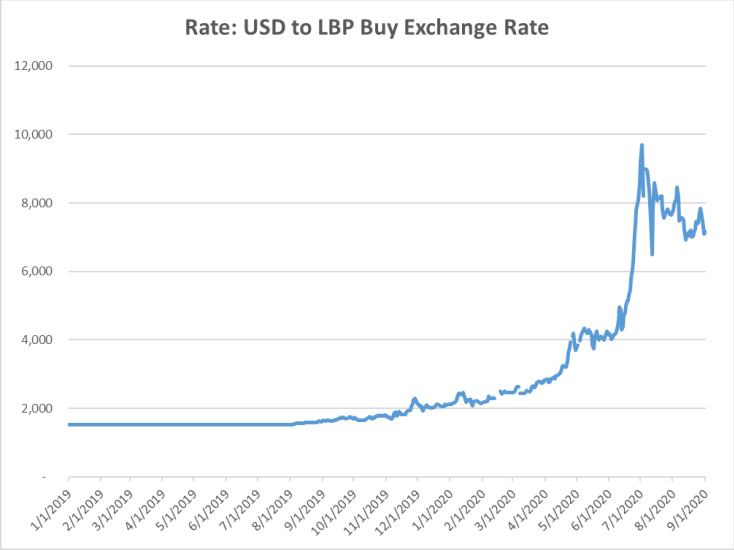
Lebanon's political challenges (including its response to COVID-19) both reflected and compounded Lebanon's economic crisis. The country's economic collapse began when it formally entered into recession in late 2019 (Ben Hassen et al., 2022). The collapse had gained momentum from mid-2020 as the currency depreciated rapidly[59] and annual inflation rates reached triple digit figures[60] (World Bank, 2021, June 1). Fiscal imbalances and rising government debt led the central bank effectively to abandon the pegged exchange rate, which had been a cornerstone of the country's economic policy, for most market transactions. For decades, the exchange rate for the Lebanese lira (LBP) had stood at 1,507.5 LBP: 1 USD. By June 2020, the informal exchange rate had jumped to nearly 10,000 LBP: 1 USD, settling back to approximately 7,000 LBP: 1 USD as of end-August 2020 (**Figure 5. Informal Exchange Rate LBP: USD, 2019-2020**). The rapid depreciation of the currency has passed through, leading to rapid inflation. Prices of food and non-alcoholic beverages rose especially rapidly in the first half of 2020, the period when this research was conducted: Food and non-alcoholic beverage prices rose by 247% year-on-year in June 2020, when all data were collected (Figure 6). As the economy has contracted, incomes and purchasing power have fallen with adverse impacts on food consumption and food security for a majority of households in Lebanon (Hoteit et al., 2021). Purchasing power has been further eroded by the actions of Lebanon's commercial banks: Since late 2019, commercial banks have imposed informal and illegal capital controls

[59] The exchange rate had moved from the historical, pegged rate of 1,508 LBP : 1 USD, to 2,525 LBP : 1 USD on the informal market as of March 14, 2020. The depreciation gained momentum in mid-2020, and the exchange rate stood at 26,433 LBP : 1 USD on the informal market as of May 2, 2022 (lirarate.com).

[60] The annual change in the price of food and non-alcoholic beverages stood at 38.19% in March 2020; this figure jumped to 150% in April 2020 and has remained in triple digits since that time (through August 2022, latest data available) (Central Administration of Statistics, 2022).

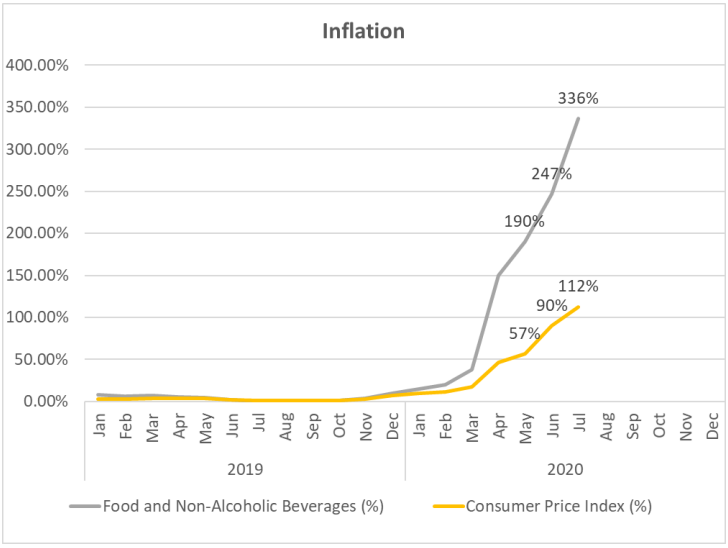
that have trapped the money of many depositors. Taken together, these economic and financial shocks are expected to have had a significant effect on the country's food environment.

Figure 5. Informal Exchange Rate LBP: USD, 2019-2020



Source: lirarate.com

Figure 6. Consumer Price Inflation and Food-Beverage Price Inflation, 2019-2020



Source: Central Administration of Statistics (2022)

Methodology

This study relies on a qualitative investigation to understand food shopping behaviors and attitudes from the perspective of Lebanese consumers. Exploratory qualitative studies are appropriate to address complex phenomena such as individual motivations or decision-making processes, for example food

shopping behaviors and attitudes (Gavard-Perret *et al.*, 2012; Montagnac, 2022). The use of qualitative methods in this way has been recognized as a key approach in developing a comprehensive understanding of food-related phenomena (Harris *et al.*, 2009), and appropriate to address gaps in case studies of consumer behavior in the area of retail marketing (Fuentes & Hagberg, 2013). Structured interviews have been effectively used to elicit consumer reflections on their shopping practices as well as changes in such practices (Helm *et al.*, 2020).

Data Collection

This study applied qualitative methods to address the research questions proposed above. Semi-structured interviews were held with adults (18+) who were currently resident in Lebanon and who held responsibility for food shopping for themselves and/or their households, in order to gather testimonies from consumers who were actually confronted with the choice of retailer from which to buy food. Interviews were conducted using an interview guide, which included a short number of closed-ended questions concerning individual and household socio-demographic characteristics followed by a number of open-ended questions which addressed major areas for inquiry (food shopping practices, changes therein, future expectations, and perception of retailers' offer with a focus on supermarkets). The interview guide allowed for flexibility in the discussion based upon the responses of the participant. Each interview lasted approximately 30 minutes. A total of 20 interviews were conducted, in line with the principle of data saturation (Glaser & Strauss, 1967). Interviews were conducted within the month of June 2020. A summary of the research respondents is provided in **Table 20**.

Interviews were conducted by phone or online using the WebEx or Zoom meeting software, as a means to avoid person-to-person contact in light of ongoing social distancing requirements in Lebanon. Interviews were audio recorded, when explicitly authorized by the participant, to facilitate careful review and analysis. Two members of the research team conducted each interview, such that one member guided the interviewee through the interview guide and the other member recorded interview notes.

Interviews were conducted in English, given the language capacities of the researchers. This language restriction likely reinforced the selection of study participants drawn from more educated and higher income segments of Lebanese society.

Participants were recruited through a public posting to social media channels that were accessible to the researchers, including a closed WhatsApp group as well as social media pages associated with the home university of the researchers. There was no restriction on parties outside the research team sharing the public postings, which resulted in de-facto snowballing. Individuals interested to participate in the study were invited to read more about the research project including the data collection process and the requirements for participation (minimum age, language capacity, and responsibility for food shopping); and to indicate their interest in participating by providing their name, contact information (phone number and/or email address), and preferred interview protocol (phone, WebEx, or Zoom) to the research team. The research team then contacted potential participants directly to obtain their oral informed consent to participate in the research, to confirm their eligibility to participate, and to schedule the interview. Personally identifiable information was required as a means of organizing the interviews, but this information was not associated with any individual responses within the interview so as to ensure anonymity in data analysis and reporting.

The research project including the recruitment strategy was subject to review and approval of the Institutional Review Board at the researchers' home university.

Data Analysis

Data analysis was undertaken concurrently with data collection, allowing the research team to assess whether saturation had been achieved. Data analysis involved multiple steps, beginning with a verbatim transcription of the interview recordings. All transcripts were subject to manual content analysis: The research team read and reviewed the transcripts and conducted coding to identify notable ideas, observations, or quotations. After initial coding, an analysis matrix was used to organize ideas, observations, or quotations according to code. From there, the research team identified themes to guide the drafting of the research findings. Microsoft Word and Excel software were used to conduct the data analysis, which was appropriate given the relatively limited number of interviews conducted.

Table 20. Respondent Demographic Characteristics

Respondent Number	Gender	Age	Nationality	Employment Status	District of Residence	Nature of Residential Area	Relationship to Head of Household	Household Financial Situation [61]
1	Female	46	Lebanon-dual citizen	Employed	El Metn	Suburban/peri-urban	Spouse	Household is comfortable.
2	Male	26	Lebanon	Employed	Aley	Suburban/peri-urban	Self	Household must be careful with its financial situation.
3	Female	49	U.S.	Employed	Beirut	Urban	Self	Household is comfortable.
4	Male	47	Lebanon	Employed	El Metn	Suburban/peri-urban	Self	Household must be careful with its financial situation.
5	Male	52	Switzerland	Partially Employed	Beirut	Urban	Self	Household financial situation is adequate. / Household must be careful with its finances.
6	Female	23	Lebanon	Student	Jbeil	Suburban/peri-urban	Child	Household financial situation is adequate.
7	Female	45	Lebanon-dual citizen	Employed	El Metn	Suburban/peri-urban	Self	Household must be careful with its financial situation.
8	Male	37	Lebanon-dual citizen	Employed	Beirut	Urban	Self	Household is comfortable.
9	Male	45	U.S.	Employed	Beirut	Urban	Spouse	Household is comfortable.
10	Female	25	Lebanon	Student	El Metn	Urban	Child	Household is comfortable.

[61] Participants were asked to indicate on the financial situation of their household using a question structure designed to be less invasive or personal, with a selection of pre-identified responses: (1) You are comfortable, (2) Your financial situation is adequate, (3) Your household must be careful with its financial situation, (4) Your household manages with difficulty, (5), Your household manages with difficulty, (6) Your household manages by incurring debt, (7) No response, (8) Do not know.

Respondent Number	Gender	Age	Nationality	Employment Status	District of Residence	Nature of Residential Area	Relationship to Head of Household	Household Financial Situation [61]
11	Female	43	Lebanon	Unemployed	Beirut	Urban	Spouse	Household financial situation is adequate.
12	Female	32	Lebanon	Employed	Beirut	Urban	Child	Household financial situation is adequate.
13	Male	30	Syria	Student	Beirut	Urban	Self	Household financial situation is adequate.
14	Male	40	Lebanon	Employed	Beirut	Urban	Self	Household financial situation is adequate. / Household must be careful with its finances.
15	Female	45	Lebanon	Employed	Beirut	Urban	Child	Household is comfortable. / Household financial situation is adequate.
16	Female	40	Lebanon	Working within the household	Aley	Suburban	Self	Household must be careful with its financial situation.
17	Female	74	Lebanon	Retired	Beirut	Urban	Self	Household financial situation is adequate.
18	Female	78	Lebanon	Retired	Beirut	Urban	Self	Household is comfortable.
19	Female	72	Lebanon	Retired	Beirut	Urban	Self	No response.
20	Female	44	Lebanon-dual citizen	Working within the household	Beirut	Urban	Spouse	Household is managing with difficulty.

Results: Lebanese Consumer Food Shopping Behaviors & Attitudes

This section presents the results of the study around Lebanese consumers' food shopping behaviors and attitudes, organized according to major themes identified during the data analysis. This section opens by presenting consumers' reported product-level changes in their food shopping and consumption patterns, which may have potential implications for the selection of food retailer. Then, this section addresses retailer-level themes directly, presenting patronage patterns across food retail formats and changes therein, followed by an in-depth exploration of the determinant factors explaining those patterns.

Crisis-Driven Changes in Consumers' Food Shopping Basket

In response to Lebanon's crises, consumers noted several key changes in their food shopping basket. These changes are of interest to the topic of supermarketization, insofar as sustained shifts may have implications for where consumers shop for food (explored within the discussion). Changes are clustered according to type of food, quantities and volumes of food, food quality and safety, and the point of origin.

Food Basket Composition

Respondents have adjusted the composition of their food basket to cope with Lebanon's crises, describing reductions to their food shopping basket as a means to reduce the cost of shopping. Consumers are selecting foods more carefully to eliminate luxury foods or foods they perceive as non-essential. Respondent 10 has stopped "splurging on things we used to buy before: No more expensive cheeses, for example, no more expensive wines." For Respondent 15, this meant removing from the shopping list her favorite food in favor of "essential" items that all household members would eat. Respondents have also cut back on the consumption of unhealthy foods such as chips and sugary snacks (Respondent 13). For Respondent 10, a shift towards less expensive foods is also viewed as a dietary improvement:

> "We are trying to cut back on meat as much as possible. . . lessen the buying of fatty stuff, for example the cheese, butter, the burgers, the heavy patties. . . We are trying to switch our diet and dietary habit to more healthy ones that have proven to be less expensive." (Respondent 10)

Quantities & Volumes

Since the onset of crisis, respondents noted an increase in the quantity of food purchased for home consumption, citing multiple reasons. Having a larger stock of food (and bottled water) at home particularly during the earliest stages of COVID-19 and the lockdown response was a means to ensure sufficient food supplies "in case shops had to close" (Respondent 3) or "in case something happens" (Respondent 10), or was simply a result of panic buying (Respondent 11). For others, a more sustained increase in the quantity of food purchases was necessary given an increase in home cooking and replacement of delivery meals.

Consumers also made bulk purchases of frequently consumed or shelf-stable food items. For example, Respondent 2 shifted from one- to two-kilo packages of ketchup and from one- to three-liter bottles of cooking oil. Doing so offered a means to gain a price advantage and manage their food expenditures, without necessitating a change in the product purchased.

Quality & Safety

Food quality has been, and remains, an important determinant in where respondents shop for food, particularly for perishable foods (fresh fruits and vegetables, fresh meat, dairy products) where quality is synonymous with freshness. Despite the various crises around them, respondents continue to seek a high or acceptable level of quality. As explained by Respondent 12:

> "What remains important is the quality of the food that we purchase, as it was before. We still want to make sure that we're eating healthy and nutritious food. So we're trying our best not to . . . jeopardize this." (Respondent 12)

Nevertheless, consumers may have compromised on quality – and specifically food safety – as a coping strategy in the face of crisis. For example, Respondent 10 indicated that food safety used to be "super important" within the household but this standard has been relaxed to avoid food waste and reduce expenditures: "Even though [the foods] are expired, one week into expiry date or one month, we still eat them."

Point of Origin & Local Products

Respondents have adjusted their food consumption basket in terms of the point of origin to prefer locally made foods manufactured in Lebanon. In some cases, this shift was opportunistic, driven by the "cheaper prices" and price advantage for local products (Respondent 8). In other cases, respondents explained this as a necessary shift driven by the "lesser availability" of imported goods on store shelves (Respondent 1). The purchase of local products coincided with altruistic motives, as the shift to buying local offers a lower environmental footprint (Respondent 5). The purchase of locally produced food has even gained quasi-political significance since Lebanon's crises, positioning this as an act of "supporting the Lebanese economy" (Respondent 15) or as import substitution that can eventually increase Lebanon's food sovereignty (Respondent 3). Point of origin is not an imperative in itself, however. Respondents acknowledge that it may be assessed in combination with other factors, such as the quality and the price of the food under consideration.

> "If you have the option between something local and something imported, if the imported is better or if the local is bad, then I buy the imported. But if they're both of equal quality or the local is better, then I go for the local." (Respondent 14)

Patronage of Diverse Food Retail Formats

Interviewees generally rely on large-format, modern, chained retailers for (at least part of) their food shopping, specifically supermarkets. This was reflected in respondents' unprompted mention of prominent supermarket chains including Spinneys, Coop, and Shoppers (Respondents 1, 3, 5, 7, 9, 12, 13, 20). The modern-format discount stores (Happy) that have entered the Lebanese food retail environment prompted mixed views among respondents. Dissatisfied respondents commented on the experience and found the discount store offer too limited or unattractive as a shopping destination. For example, Respondent 11 pointed to a lack of product assortment ("You don't have choices, you don't find a lot of things that you need for everyday unless they are on promotion"), while Respondent 20 expected steeper discounts ("They say [Happy] is the cheapest one. You find things cheaper but not cheaper-cheaper").

While a few respondents shop from only a single, large-format retailer, most respondents rely on multiple retailers for their food needs. For example, respondents supplement their shopping at modern retailers by relying on traditional, smaller, non-specialist retail formats (dekkane). These dekkane are particularly convenient to pick up a few selected items such as the Arabic bread that Respondent 13 buys every two days,[62] or the bulky purchases of water or beverages that Respondent 17 does not wish to carry long distances. The dekkane is also useful for Respondent 8 to fill small delivery orders quickly.

Another cross-channel shopping pattern reported by respondents is the use of distinct retail destinations by food product category. Respondents purchase perishable products including fresh fruits and vegetables, meat, and dairy products from smaller, traditional, specialist retailers including khodarje (greengrocers), mobile trucks selling fruits and vegetables to neighborhoods, dairy stores, and butchers that are viewed to offer superior quality or freshness. For example, speaking about FFV, Respondent 18 explained why she preferred to buy from traditional retailers:

> "Usually it's fresh more than what you find in the supermarket and less expensive. . . The supermarkets have most of the time old. To get fresh ones, better buy them from the [small shops]. Because they come with fresh fruits and vegetables usually." (Respondent 18)

At its extreme, respondents source food products – fresh foods including fruits, vegetables, dairy products (though not meat), as well as olive oil – from food producers, shortening supply chains and eliminating their reliance on retailers. Direct-supply arrangements may be familial, sourcing herbs from a friend's garden (Respondent 20) or olive grove (Respondent 15); or commercial, with purchases direct from the farmer (Respondent 4, Respondent 8) or a monastery producing cheese and yogurt (Respondent 5). These sourcing arrangements take diverse forms, as explained for the case of fresh fruits and vegetables:

> "We've kind of subscribed to this basket of greens that's been grown hydroponically. . . [The farmer] has a package where you get X amount of bunches of kale and parsley and whatever." (Respondent 4)

> "[My father-in-law] goes . . for a trip. And he stops on the side of the road with all the people who have their own grown fruits and vegetables. He doesn't buy them from the supermarket. He buys them from a fruit vendor." (Respondent 8)

Crisis-Driven Changes in Retail Format Patronage

Lebanon's overlapping crises have prompted some respondents shift the retail format from which they source their food, whether out of necessity or from the opportunity to reevaluate their food shopping behaviors.

Closures of selected food retailers – affecting both traditional and modern retail – have reduced the choices available for food shopping and impacted food shopping behaviors by forcing a shift to alternative retailers or suppliers. Switching directly linked to COVID-19 should be, in theory, temporary: For example, respondents who had relied on farmers' markets were forced to switch to alternative sources, as those

[62] As of mid-2020, the Lebanese government was able to maintain price controls on selected food items including Arabic bread (Salame, 2022, January 19). These controls would be expected to eliminate any price advantage across retailer type for these specific items, provided that price controls were effectively enforced.

markets closed in line with public health restrictions (Respondent 7, Respondent 9). Other switches reflect permanent closures linked to longer-term, durable changes in the retail landscape:

> "There is no more shopping places like before. Before we had Monoprix, we had Carrefour . . . Monoprix, he closed! . . They closed the supermarket. What I mean is, we don't have any more options for supermarkets." (Respondent 20)

In other cases, respondents changed their retail food patronage opportunistically. For example, some respondents reevaluated the importance of the retailer's location or proximity in light of political and public health crises and opted to shift their food shopping from larger, more distant retailers towards smaller, more local shops. Respondent 15 shifted to buy from smaller retailers within her neighborhood in order to reduce travel time and distance in light of physical security and mobility disruptions beginning at the time of Lebanon's October 2019 revolution. Other respondents pointed to public health concerns around COVID-19 as a primary motivation in shifting away from larger supermarkets towards smaller retailers in their neighborhood (Respondent 2, Respondent 16). Similarly, Respondent 5 took advantage of the change in lifestyle and work requirements imposed by COVID-19 to expand his direct purchases of fresh dairy, fruits, and vegetables from food producers.

For other respondents, Lebanon's intersecting political revolution and economic crisis has raised their attention to the size and implied ownership of the food retailers where they shopped. The transition to support smaller, traditional retailers over larger, modern retailers was described an act of economic solidarity and support to the local economy (Respondent 18). Respondent 3 took pleasure in the fact that she could "spread [her] spending around to different sized companies, some of which are in fact medium-sized and small- and probably serve a good niche in their neighborhood."

Similarly, a pivot to online shopping in the midst of COVID-19 may have facilitated a shift from modern supermarkets towards smaller retailers. During COVID-19, Lebanon experienced the introduction and growth of online platforms and applications that acted as intermediaries across multiple, smaller retailers. Respondent 3, whose preferred, modern supermarket chain had an online shopping platform but was unable to keep up with market demand in the early COVID-19 lockdowns, explained:

> "What I did during COVID is, I learned about more what I would say medium-sized to smaller-sized food shops and began ordering from them . . . I realized there are additional apps that are available. There's one called InstaShop that I didn't know about, for example, where there are maybe, say, 5-7 food stores in any region that are good quality and deliver to the door. These are smaller stores." (Respondent 3)

As consumers have felt the pinch of inflation on their purchasing power, price has proven an increasingly important motivating factor in prompting a change in where they source their food. Respondents described diverse responses to cope with rising food prices, including pivoting away from large-format, modern, chained retailers towards less expensive retailers, shifting among supermarkets, or reducing direct purchases of high-quality farm produce in favor of lower-cost items from retailers. For Respondent 12, rising food prices prompted intra-channel shopping as the household reduced its purchases from the supermarket the household had long patronized – and which was closest to the house – and increased

purchases from a lower-cost supermarket. Respondent 20 similarly reported that price had overridden the importance of location, driving the household to "search for other kinds of supermarkets, cheaper."

Determinant Factors in Food Retailer Patronage

Respondents were asked about the most important factors that they consider in determining where to shop for food, with probing as to the relative importance of selected factors and how they may have changed in light of Lebanon's overlapping crises. Results are organized according to major theme.

Product Assortment

Lebanese consumers confirm that product assortment is an important determinant factor in where they shop for food. Having a range of food products in a single location offers the convenience of one-stop shopping, "Rather than, you know, go[ing] to multiple shops" (Respondent 1). This is associated with a preference for larger-format, modern food retailers such as "supermarkets that have everything" (Respondent 18) over smaller, traditional formats like the dekkane (corner store) that offer "very few things" (Respondent 17). Exceptionally, Respondent 7 detailed multiple shopping trips across distinct retailers – including modern supermarkets, farmers' markets, and specialty health food stores – to obtain the very specific food items needed to adhere to a vegan diet.

Product assortment also matters with respect to the diversity of products within a single food category, again favoring modern food retailers. For Respondent 13, diversity of products matters in and of itself, and drives him to favor a local supermarket chain: "Variety of food is very important, diversity I mean. In the Coop you find more diverse food, many kinds. For example rice, in the Coop there are more than 10 kinds of rice." Having these options also allows consumers a choice of products with respect to perceived value. For Respondent 8, having multiple options is important such that, "You have a choice of price-to-quality ratio."

The relative importance of a wide product assortment and convenient, one-stop shopping may exceed that of other considerations. For example, respondents explain that they are willing to compromise on other factors, in exchange for the convenience and assortment of supermarkets. For Respondent 1, "I'm willing to kind of accept the fate of paying higher prices to be able to have it be a one-stop shop versus going to multiple places." Respondent 14 acknowledges the superior quality of fresh fruits and vegetables offered at the khodarje, but nevertheless "buy[s] from Spinneys [supermarket] just to buy everything from the same place."

Price vs. Value

Price is another significant determinant of where and how Lebanese consumers shop for food. In normal circumstances, respondents tend to assess price in tandem with product quality to determine perceived value, seeking "a good quality-to-price ratio" (Respondent 8). This assessment informs the choice of retailer, as Respondent 4 explains:

> "I need something of a certain quality. If I find it, then I look in certain places, then I go for the one that sells it at cheaper prices." (Respondent 4)

However, the importance of price has risen significantly in light of Lebanon's various crises. For Respondent 2, "[Price] was important, but now it's more important . . plus-plus important." Even middle-

or upper-income consumers have been affected: Respondent 20, who "never looked at prices" when doing her food shopping, now considers price as part of her food shopping practices. This greater role of price in informing shopping decisions has overtaken other considerations – for Respondent 16, it is even "the first thing I look [at]" – with potentially serious implications for choice of retailer.

In the unique context of hyperinflation in Lebanon, the volatility of prices and the rapidity with which increases have been passed through by retailers have raised consumer attention to pricing policy, undermining or reinforcing trust in food retailers. Retailers that rapidly pass through price increases are perceived to be "stealing from us . . trying to make other people poor in a way and they get rich" (Respondent 18). Conversely, Respondent 10 has selected a retailer perceived to be fairer to customers:

> "Some supermarkets, their prices have – they are changing daily. We know that this supermarket that we are going to now, we don't have this problem with them." (Respondent 10)

Location, Proximity, & Parking

Location is another key factor in determining where most respondents do their food shopping, with a marked preference for shops that are "nearby . . not too far" (Respondent 4) and that allow consumers to limit their time spent shopping. For those who reach shops by walking – as in densely populated Beirut – and must carry heavy purchases, "It's much more convenient to have a place near your house!" (Respondent 17). The location of a retailer and its proximity may be relative to the respondent's own home or another frequented area, such as a relative's home or work. For example, respondents appreciate the ability to incorporate shopping into one's routine "on my way back from work" (Respondent 14). The importance of store location may be qualified, however, based on the type of shopping to be done – whether it is a planned 'big shop' as opposed to popping out unexpectedly for a few items (Respondent 12, Respondent 18). For a few but vocal respondents, the mode of transportation and the availability of parking also inform the importance of store location: Those traveling by car may accept a longer trip to reach stores offering a dedicated or free parking lot (Respondent 9), even preferring a suburban branch to an urban branch of the same supermarket (Respondent 8).

The diverse crises facing Lebanon have had opposing impacts on the perceived importance of a store's location. Respondents who limited their outings in response to political turmoil (including road blockages) or COVID-19 preferred to frequent stores closer to their home, whether this was a supermarket (Respondent 9) or "the small shops around the house" (Respondent 15). However, the economic crisis has prompted others to comprise and accept a less convenient location in order to save money on their food shopping. Respondent 10, for example, explained that, "We are going to a cheaper supermarket now that's a bit far from the house."

Store Environment

Several respondents emphasized the importance of a food store's environment including the store layout and organization in informing their choice of food retailer, and observations tended to favor modern retailers over traditional retailers. Respondent 11 expressed a preference to avoid "small, cramped places," a sentiment echoed by those who favored modern retailers' more spacious and "organized" layouts (Respondent 17). The store environment matters for several reasons: It may be perceived as an appealing presentation of its assortment, as for Respondent 6 who noted the separated displays of fruits

and vegetables at a supermarket versus the "not attractive" offer at the khodarje (greengrocer). The environment may function as a resource to facilitate the shopping experience, as for Respondent 1, who prefers "Spinneys [supermarket] because it's more of a . . . more of an American experience with wide aisles and logical layout." Finally, the store environment may offer the consumer an enjoyable experience. As Respondent 7 explains, "I always tend to go to Spinneys [supermarket] because I'm familiar where all of the items are, and it's easy for me to shop there. . . I enjoy walking in supermarket aisles!" (Respondent 7)

In response to COVID-19, consumers re-assessed the value of diverse store environments in light of their potential exposure to the disease, but with divergent outcomes. For example, some preferred larger retailers as allowing for more social distancing among customers (Respondent 9), while others explicitly avoided large supermarkets where they would have to spend an hour or more in the same environment with shoppers (Respondent 2, Respondent 4). Attempts to limit exposure to crowds led some respondents to avoid retailers perceived as unable to practice social distancing (in this case, a discount store) (Respondent 16), or even to prefer less trafficked retailers such as smaller supermarkets (Respondent 10).

Food Delivery & e-Commerce

As expected, the topic of delivery by food retailers or e-commerce as a means to access food retail emerged within the interviews. However, the use of delivery and e-commerce by consumers in Lebanon appears to vary significantly from its reported use in developed countries, where online delivery, technology-assisted purchases, and e-commerce are more strongly associated with modern food retail. In Lebanon, the use of delivery does not necessarily correspond to the use of retailer e-commerce sites or applications designed as retail sales portals. In fact, only Respondent 3 indicated that she made (or had made) use of such professional or formal e-commerce sites:

> "I used to order online from Spinneys [supermarket]. They have a very good online delivery, you know, where you can actually make the order online and have it delivered. . . But as soon as COVID lockdown started, they ended up having back-orders for weeks. So I then turned to other sources for food delivery. And I in fact realized that there are additional apps that are available." (Respondent 3)

Conversely, many respondents spoke of more informal delivery arrangements that do not involve sophisticated e-commerce platforms, but rather rely on a phone call or WhatsApp message to the vendor (Respondent 7). Goods are then delivered directly to the home. Deliveries from traditional retailers such as dekkane (small grocery stores) or khodarje (greengrocers) are typically delivered by a young man on a motorbike, on a per-order and on-demand basis rather than within a scheduled delivery window. Delivery is particularly useful for the delivery of bulky, heavy items including water (Respondent 8, Respondent 17).[63] For some consumers, this delivery system is the only way in which they patronize such traditional retailers: As Respondent 11 explains, "The grocery stores, the small ones, I usually bring delivery from them. I don't go there physically."

[63] In urban areas of Lebanon such as Beirut, the poor quality of municipal water networks limits the perceived safety of tap water for human consumption. Many households rely on bottled water for cooking and drinking. Bulk water deliveries from tanker trucks are used for household purposes such as washing and cleaning.

Smaller retailers also demonstrate flexibility in accommodating the needs of consumers via delivery. In one exceptional arrangement, the respondent places a phone order for delivery to her local dekkane, which handles the entire order by selecting dry goods from the available stock and fulfilling the rest of the order from a larger supermarket in the neighborhood. As Respondent 19 explains:

> "[The owner of the dekkane] has his shop. But he doesn't have meat, so when we want meat or you want something special, fruits, he gets them from [Goodies supermarket]. . . Other things like Nescafe, like Kleenex, like other things like shampoo, from his shop." (Respondent 19)

Motivations for making use of delivery or e-commerce for food shopping include convenience, time saving, and reduction in labor (particularly for the transport of heavy food items). For Respondent 19 and Respondent 20, the use of delivery is also useful as a means to limit unnecessary shopping such as impulse buying, particularly at a time of pressure on the household budget: "When you go out you buy more things. When you are at home and you order, . . you order just what you need." (Respondent 20)

Consumers who did not routinely make use of delivery from food retailers, cited reasons including high delivery fees that exceeded the perceived convenience value (Respondent 10) and an enduring preference to make their own selections of food, particularly of perishable foods including fresh fruits and vegetables. Respondent 14 takes time to go to the retailer and choose for himself, because "You know you're going to get the right thing. Particularly if you're ordering produce, . . you choose exactly what you want." By avoiding delivery and maintaining control over the selection of goods, Respondent 18 escapes cheating, ensures she gets good quality produce, and avoids wasting money:

> "I cannot call the shop and say, 'Send me one kilo of cherries and two kilos of apricots.' They come and they are not worth at all to be eaten. Because they choose the worst and they send it. While when I go there, I choose it myself." (Respondent 18).

A third reason to avoid delivery, although quite specific, also relates to trust of the retailer and their delivery staff. Respondents 17 and 18, both older female respondents, refuse to use these informal delivery mechanisms, as they perceive a risk to their personal safety that exceeds the potential convenience of delivery to their home.[64] For Respondent 18:

> "I prefer not to have delivery services. Because [the deliveryman] has to come into the house. . . He knows where I live, and he knows that I am alone at home." (Respondent 18)

Since COVID-19, respondents reported increased use of delivery from food retailers, primarily as a way to limit human interaction and thus the opportunities for disease transmission (Respondent 2, Respondent 4, Respondent 15, Respondent 16). The increased use of delivery was not limited to a single retail format, applying to both larger supermarkets and smaller, traditional formats. Delivery was even used to replace shopping at farmer's markets, which were formally closed due to government measures in response to COVID-19. For Respondent 7, the ability of farmers to pivot from these market sales to home delivery allowed her to maintain the direct-to-producer link.

[64] Neither Respondent 17 nor Respondent 18 indicated if a more formal delivery system would pose the same perceived risk to personal safety.

Customer Service & Orientation

According to respondents, customer service is a secondary factor in informing the choice of food retailer, of less importance to consumers than factors such as product assortment (Respondent 3, Respondent 13), product quality (Respondent 3, Respondent 14), and price (Respondent 13). Consumers are willing to compromise on this factor and patronize a food retailer "even if customer service is not the best" (Respondent 14). The lower importance of customer service is reflective of a perception that customer service is generally of a low level among Lebanese food retailers and thus not a meaningful point of distinction. In the words of Respondent 4, "As a general rule, most outlets here have more or less poor service."

Despite these low expectations, perceptions vary as to whether smaller or traditional food retailers offer superior customer service to modern retailers. This assessment is complicated by the wide meaning of 'customer service' and the types of interactions preferred by customers. For example, some customers interpret this as the ability to obtain information from retail staff:

> "In a big supermarket it's not easy to get the staff to ask. In a small supermarket it's easier when you want to know something – what's the price, what's the cost, for example." (Respondent 2)

Elsewhere, the option for self-service is an important feature for some respondents, which leads them to favor modern retailers rather than traditional or specialist retailers such as butchers or fishmongers.

> "If I want red meat or fish, I don't necessarily want to have to ask a guy behind a counter every single time if it's just for a certain item." (Respondent 1)

COVID-19 Measures as Symbolic of Customer-Orientation

The imposition of measures to control COVID-19 at the time of data collection can be interpreted as a form of customer service, and indeed respondents overwhelmingly reported that retailers had imposed practical measures to limit the potential transmission of COVID-19. Measures included requiring staff and shoppers to wear masks and gloves, providing hand sanitizer, requiring shoppers to have their temperature taken and/or pass through disinfection tunnels upon entry, and indicating or reminding shoppers to maintain a physical distance from each other. Consumers viewed some of these measures with appreciation (e.g., mask requirements) or tolerance (e.g., gloves, temperature checks) (Respondent 8), while disinfectant sprays or thermometer-based temperature readings were viewed more as a nuisance than an effective way to protect shoppers (Respondent 1, Respondent 4).

The importance of protective health measures in informing the choice of food retailer was not consistent. For some, the presence of health protection measures guided where respondents shopped for food. Respondent 3 chose only to shop in person at those retailers that had "at least visible measures in place for everyone working in the store and everyone visiting the store." Similarly, Respondent 4 avoided retailers "where we see a lot of people without masks, including staff." However, other respondents overlooked the fact that retailers – specifically smaller retailers – did not apply proper health and safety measures particularly to other customers, and continued to shop there. For example, Respondent 15 justified this as a practical limitation as retailers could not control on Lebanese consumers: "Being small shops around the corner, they cannot – people who come in don't really adhere to the rules and regulations."

Food Safety

Respondents were specifically asked about the importance of food safety in informing their food shopping decisions, which was expected to be of heightened importance in light of COVID-19 and wider attention to issues of public health. However, respondents tended to express a limited priority for this issue, explaining that weak, non-transparent, or poorly enforced food safety standards are an ineffective selection criterion. For Respondent 3, the opaque practices of processed food manufacturers or other value chain actors offer no basis for comparison of food retailers' offer. As Respondent 14 explained:

> "It's comforting if you see [food safety measures]. But no one is doing it. So for lack of a better choice, it's not that important in choosing a place." (Respondent 14)

Without robust food safety standards, respondents instead rely on proxy measures to select a food retailer and ensure the food they buy is safe to consume. The measures may include observations of basic hygiene measures, for example "the workers wear gloves and it's clean" (Respondent 13). Alternatives to food safety standards also include perceived freshness or an organic certification. For example, Respondent 9 chooses to buy fruits and vegetables at farmers' markets that offer "organic and fresh choices of the vegetables . . to minimize the chemical exposure."

Those respondents who indicated that food safety (or a proxy) specifically informs their choice of food outlet, tended to disfavor smaller retailers and favor larger retailers. Respondent 5 avoids buying his fruits from a traditional, local shop that displays them on the street, without refrigeration, and exposed to potential contamination from "the exhaust gases of the cars and people passing by." Respondent 9, who bought fresh fruits and vegetables from the farmers' market until COVID-19 closures, nevertheless relied on a major supermarket chain as the preferred source of other foods:

> "Normally the reason why we go to Spinneys is comparing to other shopping outlets, we believe in Spinneys [supermarket] they take care of the food safety better than the others." (Respondent 9)

Reputation, Trust, & Customer Loyalty

The theme of trust emerged repeatedly within the interviews, underlining the importance of retailer reputation and consumers' confidence in retailers to provide food of appropriate quality (Respondent 19) and at a fair price (Respondent 18). Respondents based their perceived reputation and trust of food retailers on diverse sources, including positive or negative media reports (Respondent 5), the opinions or statements of trusted actors (family, friends, or "people"), and their own (repeated) experience as customers. These sources may overlap and be mutually reinforcing, as explained by Respondent 11:

> "The family, they deal with him since a long time, this butcher. And we know he brings his products fresh, he gives you fresh things. He knows us. He doesn't send me anything bad . . . I've been there once or twice, I checked them out, everything." (Respondent 11)

References to trust and retailer reputation repeatedly and spontaneously cited meat, suggesting this may be a particularly sensitive food product for Lebanese consumers.[65] For this product, trust relationships

[65] Of note, the term *halal* was not mentioned in any interview, even in reference to meat products.

appear initially to favor traditional butchers. However, as Respondent 20 explained, modern retailers may be able to gain customers through the repeated delivery of a high quality product:

> "At the beginning, I was reluctant, I didn't want to buy [meat] from Spinneys [supermarket]. You know, I hear a lot of things, you know. But with time, really, he's really good, they're really good and they give us good meat." (Respondent 20)

Lebanese consumers may reward a trusted retailer with customer loyalty. In the most extreme case, Respondent 19 proudly declared her loyalty to a single supermarket for 38 years. For some customers, this loyalty is rewarded in turn by (small) retailers who prioritize their longstanding customers. Respondent 16 observed that, "Sometimes small shops if you deal with them for a long time, there will be a special bond. . . They will put you like a priority where they will send you the offers." In the context of COVID-19, Respondent 16 was excited to report that her local corner shop had eliminated the delivery charges on her bill as a way of rewarding her loyalty, "And this was really special."

Socio-Cultural Determinants of Food Shopping

Interviews with Lebanese consumers reveal that socio-cultural factors indeed inform where they shop for food. Beyond the utilitarian provision of food, food retailers are perceived to offer hedonic and ludic value, spaces to forge relationships, and to express, define, and construct one's identity. In their engagement with food retailers, these respondents are using the resources provided beyond assortment and price: They benefit also from the non-rational, non-functional, and cultural element of sociality embedded in (food) shopping (Shields, 1992).

Hedonic & Ludic Value

Lebanese consumers' perception of the hedonic and ludic value they obtain from food shopping informs the choice of food retailer. Consumers may view food retail outlets, especially modern retailers such as large-format supermarkets, as a destination and a source of enjoyment, leisure, or even exploration. Respondent 13 describes a trip to the supermarket as a pleasurable experience, even within a crisis context: "I enjoy when I go to the Coop [supermarket], I like it." For him, food shopping is not a chore to be hurried but a social activity undertaken in partnership: "I spend about an hour or two hours to choose my food. I go with my friend usually." Respondent 20 goes even further, seeking out modern retailers as a means to discover her setting and local context:

> "I am a person who loves supermarkets! I love supermarkets! I love going, even when I travel, I like to go to see the products, to see what they have, the spices. I like it." (Respondent 20)

Elsewhere, Respondent 5 expressed his decision to purchase meat from a traditional, stand-alone butcher not as a function of quality, freshness, or trust in a supplier; rather, he spoke in terms of nostalgia and the pleasure derived from reigniting memories of earlier shopping behaviors:

> "The butcher, and it reminds me more of my childhood. You know, I often went in the village to buy at a small butcher." (Respondent 5)

For some respondents, the COVID-19 lockdowns heightened the importance of food shopping as a non-utilitarian activity. Food shopping was one of the few approved activities for those Lebanese who were not deemed essential workers, providing an excuse for physical activity or movement outside of the house

(Respondent 17, Respondent 18). For Respondent 8, the trip to the supermarket was a moment of calm and refuge: "[Supermarket shopping] is my alone time away from the kids!" In this way, COVID-19 particularly reinforced the perspective of a large-format supermarket as a destination and source of pleasure or relaxation, as described by Respondent 7:

> "I enjoy walking in supermarket aisles! . . It felt a bit like, in the lockdown, I needed the space, where I could just walk down supermarket aisles, and look at items, and choose what I wanted. It was a bit relaxing for me to do." (Respondent 7)

Conversely, the COVID-19 pandemic and Lebanon's economic crisis have reduced or even eliminated the enjoyment of food shopping for other consumers. Respondent 10 perceives that a previously "fun" activity has become "strictly the necessary" and a "chore." For others, the sense of enjoyment has been replaced with negative feelings of stress (Respondent 1, Respondent 3, Respondent 11, Respondent 12) and even fear. Parenthetical references to 'supermarkets' suggest that consumers perceive this loss of enjoyment more strongly with regards to large-format supermarkets.

> "It used to be relaxing. I used to enjoy going to the supermarket. I liked to look around and see stuff. Now it's very stressful, very, very stressful. It started stressful with COVID because you want go in, finish and come back out because you're so scared of catching anything. But now it's also, you want to go there and [laughs] pay as less as you can because it's so expensive everything. It's scary." (Respondent 11)

Relationships, Interaction, & Inclusion

The importance of relationships with food retailers – or their absence – arose repeatedly within the interviews, confirming that consumers value or assess the interaction with the retailer or its staff beyond the value of simple customer service. In this way, food shopping becomes more than the exchange of goods for money, instead this market exchange is rooted in a social context as per Shields (1992). Consumers tended to stress positive relationships with traditional food retailers or even food producers, while remarking on the absence of relationships with modern food retailers. For Respondent 7, the decision to buy vegetables not from a retailer but directly from an array of farmers is explained in terms of these market-based relationships: "I have a network of all local organic farmers now. And you build a relationship with these people." Going further, Respondent 18 describes the potential appeal of a smaller retailer as "family-like," while Respondent 19 calls her local dekkane owner "a member of the family!" This relational element is often missing from modern commerce, according to Respondent 18, who claimed that, "In big shops, they don't even care for me! As if I'm just somebody who comes and buys."

For others, the choice of food retailer may be informed by the consumer's ability to control the socio-cultural exchange within that interaction. Respondent 1 explained that the ability to keep others at a distance – a very specific objective but socially constructed nevertheless – is important both to overcome a language barrier (she did not speak the local dialect of Arabic fluently) and to maintain established patterns for social interaction, and informs to her decision to shop at a large, modern-format supermarket:

> "Part of it is language. Part of it, I think, is also coming from an American mentality where we're much more close-minded and a little standoffish, I guess, and not preferring to interact so much

> [laughs]. I know the mentality here is kind of more of an interactive nature. So I think it kind of comes from my background, my personal background." (Respondent 1)

The selection of food retailer is even described in terms of inclusion and exclusion within the community, of nationalism and racism, with divergent objectives reported. Respondent 17, a Lebanese woman, acknowledged that she has consciously decided to avoid smaller retailers that employ Syrian laborers within the store, instead preferring to patronize a local supermarket that hires Lebanese workers; the origin of workers may be distinguished from their accents when speaking Arabic. For her, the decision to support a retailer that employs local workers is justified based on economic nationalism.[66] Conversely, for Respondent 9, a non-Lebanese man, the decision to shop at a modern, large-format retailer is a function of the more welcome treatment received when shopping for food:

> "[My household has] been here for three years. They know us, and they treat us good. So the customer service for us, at the individual, it's fine. . . I'm of black race. They have different treatment for different people. . ." (Respondent 9)

Construction of the Consumer Identity

As explained above, CCT emphasizes the role that (food) shopping plays in self-expression for the individual and in the construction of the individual's identity (Williams et al., 2001). Indeed, some of the interviews with Lebanese consumers underpinning this research provide evidence to support this perspective, revealing diverse identities constructed through the act of food shopping in diverse retail formats. While some of the meaning-making process appears to be long-standing, others – particularly those clustered around power and nationality – have been heightened or taken on new meaning in the context of Lebanon's political and economic crises.

Some respondents have created an identity in their food shopping patterns that appears to be rooted in history. For example, in his choice to patronize a traditional butcher, Respondent 5 evokes a traditionalist identity reminiscent of his childhood. By shopping at a traditional butcher, he may identify as a support of older, endangered ways of life that are threatened by modernity. However, a connection to the past is not only the purview of those who use traditional retailers to inform their identity. Indeed, in describing her love of supermarkets, Respondent 20 envisions herself as an explorer and hunter of spices, conjuring images from centuries ago. Conversely, Respondent 19 looks to her own shopping history to define herself as a uniquely loyal contrarian: For 38 years, she has maintained an elaborate arrangement with the local dekkane to supply her food needs directly or from a local supermarket. She flatly refuses to visit any retailer directly, explaining: "I don't like supermarkets myself, I don't like, I'm not eager. Unlike other people." (Respondent 19)

For some non-Lebanese respondents living in Lebanon, the choice to patronize modern format retailers is a way of preserving their existing identities despite living overseas, and of reinforcing their self-perception as 'normal' people. In this way, Respondent 1 is not an outsider or an antisocial individual;

[66] Lebanon's history with neighboring Syria is complicated and not entirely distant. This history includes Syria's extended military occupation of (parts of) Lebanon between 1976 and 2005, accusations of direct interference within Lebanese national politics including political assassinations, and, following the outbreak of civil war in Syria in 2011, the displacement of some 1.5 million Syrian refugees into Lebanon with direct impacts on the local labor market.

rather she is a regular woman going about her food shopping just as she would have done back in the United States. Through his choice to patronize a modern retailer, Respondent 9 and his family ensure that they are not objects of curiosity or disdain, but an average family doing typical chores.

In the context of Lebanon's economic crisis, the choice of a food retailer has taken on new meaning, with a line of division between larger and smaller retailers. For Respondent 3 – a non-Lebanese female – the act of shopping for food across multiple, smaller retailers is seemingly an expression of her role as a defender of the local and the weak, supporting the David of traditional, neighborhood retailers against the Goliath of larger, modern retailers that have dominated the market in recent years. With her food shopping, she redistributes power within the market, akin to a modern day Robin Hood. This sense of meaning making has gained salience – or perhaps only occurred to the respondent – in the context of political revolution against the country's elites and associated economic collapse.

A similar but distinct identity reflected among respondents is that of supporter of national sovereignty. For this consumer, food consumption and shopping are a quasi-political act (possibly and coincidentally offering the advantage of lower prices). This choice manifests in both the selection of locally produced food products (Respondent 3, Respondent 18, Respondent 19), as well as a preference for food retailers that employ Lebanese workers (Respondent 17). Voiced in perhaps an extreme way, Respondent 17 uses her choice of food retailer to reiterate that she is not a foreigner in her own country but a Lebanese woman who acts as she does "for the sake of my country!"

Through her interview, Respondent 18 brought attention to the role that a food retailer can have in preserving or eroding a class identity, particularly in a moment of economic precariousness. This woman described her deep familial roots in Lebanon as well as high levels of education and income in her family, before explaining that she now faces an uncertain future as her retirement savings have eroded and become trapped in the country's banks.[67] The intersection of age and wealth come into focus the moment she enters a food retailer, though she did not specify which retail format(s) she envisioned:

> "As an old person, if you are not rich, you are not usually welcomed! Maybe you cannot feel it now. But when you grow old, you feel the more money you have – people don't take you for you, they become very sweet with you because you can pay, you have money, it's okay, *ahlan wa sahlan* (welcome). But if you are poor and you go to those shops, usually, they don't welcome you. And we are not used to this style, where all your life you feel you can, and then all of a sudden it might happen that you can't."

Discussion

This discussion explores the intersection of the above results with the existing literature. Then, it considers the potential implications of these results on the trajectory of food retail transformation in Lebanon.

Food Retailer Patronage and Perspectives

The Lebanese consumers interviewed report a clear reliance on modern food retailers, notably well-known supermarkets chains (though not discount stores), motivated by the width and variety of product

[67] Since late 2019, Lebanon's commercial banks have imposed informal and illegal capital controls that have trapped the money of many depositors.

assortment and the convenience of one-stop shopping. Nevertheless, consumers practice cross-channel shopping, as predicted in the literature and observed in other developing country contexts (e.g., Hino, 2014; Hino & Levy, 2016). Consistent with earlier studies, cross-shopping allows consumers to source fresh items from more traditional retailers (or even directly from producers or gardeners) perceived to offer better quality, freshness, or even intangibles such as trust (Chammas & Yehya, 2020), personal relationships (Sehib et al., 2013) , or nostalgia for an earlier shopping format (Shin & Parker, 2017). The spontaneous mention of butchers as a preferred supplier of fresh meat aligns with earlier studies of Lebanese (Chammas & Yehya, 2020) and other Arab consumers (Hino, 2010) that found this to be a particularly sensitive food item, emphasizing a cultural rather than a religious dimension within regional diets. Traditional retailers like small corner shops remain useful as a means to satisfy specific needs, such as 'small shops', forgotten items, or bulky items, in line with evidence from other MENA countries (Tessier et al., 2008).

The factors that inform Lebanese consumers' choice of food retailer are generally consistent with those found elsewhere in the literature, particularly the literature specific to developing country contexts. Per Tessier et al. (2010), factors specific to the food, to the store, and to the shopping motivation are deemed important, including product assortment, price or value for money, and location. For example, while consumers consider location to be an important factor and tend to prefer 'closer' food retailers, this is qualified according to the type of shopping, the location of reference (e.g., home, work, or other frequented location), and mode of transportation. These developing country consumers also value a wide product assortment and the convenience of one-stop shopping, contradicting the earlier work of (Goldman, 1981). However, other factors that have been cited in the literature as important such as customer service and food safety (e.g., Hai Tran & Sirieix, 2020) appear to be less important factors in selecting a retailer: As the levels of customer service and food safety are generally low, they offer consumers no meaningful basis for comparison across retailers or retail formats. COVID-19 failed to elevate the importance of food safety within Lebanese consumers' shopping calculus; moreover, consumers expressed a potentially dangerous willingness to compromise on even this basic expectation of food safety in order to meet their food needs in the face of economic pressures.

The evidence presented indicates that food shopping is a socially constructed activity within the context of Lebanon, even for consumers who patronize modern food retailers. This conception of food shopping as more than a simple exchange of goods for money is consistent with both a socio-cultural reading of the Big Middle[68] (e.g., Arnould & Thompson, 2005; Fuentes & Hagberg, 2013; Helm et al., 2020; Shields, 1992) and studies of food shopping undertaken in other country contexts (e.g., Sehib et al., 2013; Shaker et al., 2022). Consumers described food shopping as more than just an exchange of food for money: This market exchange incorporates actions including relaxation or entertainment, the reinforcement of personal identity, the construction of relationships, the advancement of economic or food sovereignty, even an act of nationally- or racially-rooted social inclusion or exclusion. The act of food shopping evokes emotion, whether positive (fun, relaxing) or increasingly negative (stress, fear, panic) in the midst of Lebanon's

[68] This conception of (food) shopping is not the unique purview of a socio-cultural reading of the Big Middle or even CCT. See, for example, early work by Tauber (1972) exploring diverse personal and social motivations for shopping and by Hirschman and Holbrook (1982) on the hedonic value of consumption behaviors.

overlapping crises. Reports of anxiety around food shopping in the context of COVID-19 in particular are therefore consistent with reports from other country studies (e.g., Chenarides et al., 2021).

Impacts of Crisis on Food Shopping Behavior & Attitudes

Consistent with the available literature, the experience of Lebanese consumers suggests that the combined crises of COVID-19, political disruption, and particularly economic collapse have affected food shopping behaviors and attitudes. These crises have affected not only which foods consumers buy, but also where and how they shop for food.

In line with the emerging literature, Lebanon's crises have prompted an adjustment in consumers' eating patterns. Reported changes in food consumption include a shift towards cheaper foods, favoring local versus imported items, and an outright reduction in foods seen to be too expensive (e.g., meat, dairy products), luxuries, or unnecessary. Of note, these food items are not of a single type, seemingly spanning perishables and non-perishables as well as processed and unprocessed items. These reported changes are only partially consistent with what the literature might predict – such as a reduction in red meat consumption (Rabadán et al., 2020; Zurawicki & Braidot, 2005) but not a reduction in non-essential comfort foods (Ben Hassen et al., 2022) – though in some cases this might be due to the concurrent nature of Lebanon's crises. However, these results are generally consistent with the study by Ben Hassen et al. (2022) of changes in Lebanese consumer food behaviors as a result of COVID-19. While changes in the composition of consumers' food basket is not the direct focus of this research, it is important insofar as changes (if sustained) may have implications for the retail formats patronized by Lebanon's consumers.

In the context of COVID-19 and economic crisis, some Lebanese consumers have shifted food retailers. Among those who described a clear movement, several noted a shift among modern format retailers while others described a movement away from modern retailers to favor traditional retailers. This finding is only partially consistent with earlier research. Ben Hassen et al. (2022) found that Lebanese consumers reported a stronger increase in buying from small supermarkets or grocery stores than from large supermarkets as a result of COVID-19,[69] While similar findings of a shift toward local, smaller, and independent food retailers were also reported in the United Kingdom (Thompson et al., 2022). Our interviewees explained a shift in offering a variety of reasons. Principal reasons included attempts to avoid crowded outlets/shopping destinations in the context of a global pandemic, in line with the preference for more spacious retail formats as reported in other studies (Thompson et al., 2022) ; as well as to find lower-cost retailers amidst rapid and sustained food price inflation. The increase in direct sourcing from food producers, whether via delivery or direct on-site purchases, appears to be temporary, in line with consumers' expectations that time pressures would intensify as they increasingly left their homes to return to work post-COVID.

We also find that Lebanon's overlapping crises have caused consumers to increase their reliance on delivery services,[70] similar to Ben Hassen et al. (2022). Our qualitative approach, however, reveals that

[69] The authors present this result in Table 4 of their study, though they do not interpret this result in the text.

[70] Delivery services – for goods ranging from food to pharmaceutical drugs, from pirated DVDs to red-hot, coal-fired *narguileh* or *shisha* pipes – were widespread in Lebanon even before COVID-19. These services relied on an abundant and cheap workforce (often young, foreign, and underemployed men who are easily hired and fired due to lax labor

reliance is not strictly limited to modern format retailers.[71] While larger retailers had previously invested in e-commerce infrastructure, these were (initially) overwhelmed with the surge in demand linked to early COVID-19 lockdowns. Unlike in developed countries, traditional or smaller retailers were not excluded from the surge in demand for delivery services. Traditional retailers including small grocery stores (dekkane) and greengrocers relied on low-cost, low-overhead solutions – an ample supply of underemployed young men, motorbikes, and WhatsApp messaging – to flexibly respond to consumer demand in light of public health concerns, roadblocks, and temporary market closures. Moreover, the introduction of mobile phone apps that allow consumers to consolidate purchases sourced from a range of smaller retailers suggests that technology-assisted shopping may not solely favor modern-format retailers. Indeed, consumer voices explicitly recognize the role of technology and e-commerce to widen their reach across retailers, thereby pivoting away from dominant retailers and redressing power inequities in food retail (McArthur et al., 2016). While the supermarket model previously represented technological innovation in food retailing, the use of online delivery by Lebanon's traditional retailers suggests that technology may be more transversal across retail formats and not solely a source of competitive advantage for modern retailers.

Lebanon's crises have triggered a rapid shift in the value that consumers place on diverse resources offered by retailers, perhaps clearest in the impact of COVID-19 concerning consumers' health and safety. Consumers applied limited but evolving information on the disease and its transmission to evaluate the comparative offers of local, traditional retailers versus spacious, modern retailers versus online shopping. Importantly, consumers derive different meanings from these resources and the same space can simultaneously reassure or threaten: Some consumers preferred to concentrate shopping in their communities, circumscribing the radius of disease even when safety protocols were abandoned, while others looked to larger, modern retailers as a way to socially distance and control their risk of disease. Regardless of format, and with different conclusions, consumers made use of retailers' offer to protect themselves and their households and communities from disease, to build a sense of security in their decisions, and to limit or control fear and anxiety due to exposure via food shopping activities.

The persistence of identity creation through food shopping and a deliberate choice of food retail outlets, even in the context of crisis, echoes other studies. For example, Thompson et al. (2022) report that, in the context of COVID-19, English shoppers similarly framed their choice to shift patronage away from supermarkets as a sustainable and ethical act of engagement with the local food environment. The role of Lebanon's crises – particularly political revolution and economic crisis – in repositioning food shopping through an ethnocentric lens is similarly not without precedent, as earlier studies found among

laws). In densely populated urban areas, distances tend to be small though insufficient civil infrastructure prompts those with the means to use delivery to avoid driving or walking.

[71] In Lebanon, delivery may range from basic to sophisticated. The former may include a phone call to a store employee and immediate dispatch by a young, informal, non-uniformed worker on a motorbike bearing no branding of any kind. The latter may feature a retailer website, scheduled delivery windows, branded trucks and uniformed delivery drivers. Intermediary arrangements may include either an enterprising small retailer who has informal employees collect items from multiple other retailers, and are formalizing via mobile apps (InstaShop, Instacart) that gather small retailers to maximize consumers' choices and consolidate collection and delivery.

Argentinian consumers a strong preference for domestic products (all else equal) as a means to help their national economy recover from its economic crisis (Zurawicki & Braidot, 2005).

Implications for Food Retail Transformation

The results presented above offer several possible implications for the future trajectory of food retail transformation in Lebanon. The implications presented here are divergent: Some impacts may have been temporary, others promise to be more durable in nature. Some impacts may be ambiguous, while others more clearly seem to favor either traditional or modern retail formats.

Several changes in Lebanese consumers' food shopping behaviors immediately linked with COVID-19 may have been temporary, at least relative when viewed within the Lebanese context of a sustained economic crisis. Changes in a food retailer linked to business and school closures and work-from-home patterns seem unlikely to be sustained over the longer term. The decision to favor more spacious modern retailers explicitly to avoid crowding in favor of social distancing may not endure if consumers revert to a preference for a more crowded environment as reported elsewhere in MENA (Seock & Lin, 2011), and thus have a limited impact on the trajectory of supermarketization in Lebanon. Those changes driving by a growing focus on food prices promise to be more persistent, particularly as the country's leaders fail to take action (World Bank, 2021, June 1, 2022a) and as economic crisis enters its fourth year with no clear path to recovery (Reuters, 2022, October 13).

Selected changes in food shopping behaviors may have an ambiguous effect on different retail formats. First, amidst Lebanon's worst-ever economic crisis, consumers are likely to be increasingly price sensitive as they have been in other hyperinflation-affected contexts (Zurawicki & Braidot, 2005). Consumers are therefore likely to favor those retailers that offer lower-price offers or better value for money than their competitors. Among modern format retailers, this sensitivity may favor discount stores or hypermarkets if we extrapolate from consumer responses to earlier economic crises in Asian and Latin American countries (Ang et al., 2000; Zurawicki & Braidot, 2005). Consumers may completely disregard factors that were already of limited importance (e.g., food safety, customer service) or compromise on those that were a key consideration (e.g., location, hedonic value) in the search for lower prices. The growing importance of price may in fact drive cross-channel shopping among Lebanese consumers looking to stretch their food budgets. Second, consumers' reliance on delivery/e-commerce solutions to deliver their food needs, which seems likely to be sustained as compared to pre-COVID levels (Boumphrey, 2020), may not automatically favor modern format food retailers given the low-cost, low-technology delivery services available from traditional retailers within the Lebanese retail environment. Moreover, the impacts on distinct retail formats are ambiguous, as technology-assisted delivery via platforms and apps has facilitated cross-channel shopping (from both modern supermarkets and traditional grocery stores).

Elsewhere, traditional retailers may benefit from selected impacts of COVID-19 and economic crisis in Lebanon. Supply chain shocks linked to COVID-19 and ongoing economic disruption were expected to reduce the diversity of food products available (BBC World Service, 2020a; Boumphrey, 2020), which should disproportionately harm those modern food retailers that rely on a wide product assortment to attract consumers. Separately, Lebanese consumers' demand for locally produced food is likely to grow as a combined result of supply chain disruptions, economic pressures, and a food sovereignty narrative. This stronger preference should harm retailers whose market offer depends on the availability of

imported items and or the appeal of a foreign brand name. Modern format retailers, specifically foreign-owned retailers linked to international franchises and supply chains, may be disproportionately affected, losing sales and market share. Third, and perhaps most significantly, traditional retailers may be expected to gain market share as Lebanon's economic contraction reduces the size and purchasing power of the country's middle class, which is the core customer of the modern retailer. Inverting the logic that a growing middle class and rising living standards should provide a growth opportunity for modern retail (Nandonde & Kuada, 2018; Reardon et al., 2003), Lebanon's economic contraction would predict the opposite: The case for marketing to the Big Middle may shrink as the middle class shrinks.

Finally, selected impacts of Lebanon's crises may favor modern retailers. Changes in consumers' food basket may tend to favor modern retailers: Traditional retailers like butchers and dairy stores may disproportionately suffer a reduction in sales and market share as consumers cut their consumption of fresh products including red meat and dairy products. Modern retailers, whose market position is rooted in a competitive advantage to deliver non-perishable foods (Goldman, 2000; Goldman & Hino, 2005; Goldman et al., 2002), may benefit if crisis-driven changes in the consumption basket persist.

In sum, the evidence presented above does not provide any conclusive evidence to suggest that modern retailers have gained a decisive advantage or lost the opportunity to dominate Lebanon's food retail environment as a direct result of public health, political, or economic crises experienced in recent years. The past may predict the future as traditional and modern retailers continue to compete by adapting their businesses to changing marketplace conditions (Evans, 2011). However, if retailers respond to Lebanon's highly uncertain, complex, and fast-moving environment by adopting nimble, discovery-based approaches (Manolova et al., 2020), this could result not in a fragmentation of retail formats as retailers seek any advantage to defend or expand their market share (Herbert et al., 2018). The actual effects of crisis on modern and traditional retailers' market shares, as well as in prompting the emergence of novel retail forms, remains to be confirmed through future research.

Limitations

This study, as any, is subject to limitations. Although typical of many studies based on semi-structured, qualitative interviews, the sample population was relatively small and not representative of the wider Lebanese population in terms of socioeconomic status or geographical location, limiting the generalizability of the findings. Other limitations include immediacy bias within the responses of interviewees and the constraints of qualitative data analysis.

Conclusions

This research study offers several contributions. It is among if not the first to offer an in-depth, qualitative examination of Lebanese consumers' food shopping behaviors and attitudes, and serves as a useful complement to emerging, quantitatively based studies (e.g., Ben Hassen et al., 2022). This article widens its focus beyond a concentration on COVID-19 to consider the implications of overlapping crises in the Lebanese context, notably one of the worst economic contractions in modern history. This wider scope contributes to a still-limited literature that explores the intersection of crisis and food retail transformation (e.g., Ang et al., 2000; Maumbe & Chikoko, 2020; Zurawicki & Braidot, 2005). Accordingly, this study may be useful to those who seek to understand the interaction between severe or coincident

crises and changes in consumer food shopping behaviors and food retail transformation in other crisis-affected developing country contexts.

The importance of this study lies in the argument that a better understanding of the motivations behind food shopping can be crucial in delivering a food (retail) system that better responds to consumer needs and demands, in reshaping the Lebanese food system during and post-crisis, and in informing public policy related to food systems.

Theoretical Implications: A socio-cultural reading of the Big Middle suggests that food retailers compete by offering consumers a combination of resources that extend beyond product assortment and prices to include store environment, customer service, social cues, and more. This research provides further, clear evidence that the food shopping experience is socially constructed, as predicted within the CCT literature. Lebanese consumers – as consumers in many other markets – describe this process as more than a utilitarian trade-off between product assortment and prices; they derive meaning and value from their interactions with and within retailers. Moreover, this research has found that crisis may test, but not eliminate, the value of these resources as consumers seek to satisfy their food needs. While crisis has brought practical considerations like price to the fore, it has not eliminated the meaning that consumers derive from shopping; to the contrary, consumers may conveniently re-interpret their food shopping decisions to make meaning of their sacrifice. Even amid Lebanon's revolution, illness, and economic collapse, pragmatism and materiality continue to co-exist for consumers.

The application of a socio-cultural reading of the Big Middle to unique circumstances also allows us to test its theoretical propositions in new ways. In this study, we explore how crises shift consumer expectations and whether the value propositions of traditional and modern retailers (still) bring them resources they prefer and with which to derive meaning. This study provides evidence that crisis can indeed shift preferences at least temporarily (as in response to COVID-19) and likely over the longer-term (as an adaption to reduced economic circumstances), with implications for their choice of food retailer.

This study identifies emerging signs of retail transformation and confirms that they are consistent with the Big Middle, but a challenge to the dominant modernization narrative underpinning the supermarketization literature. Anecdotal evidence shows that the smaller, independent stores are 'trading up' by offering more responsive service amid COVID-19 (e.g., improved and technology-assisted delivery, free delivery to loyal customers). The creative deployment of low-cost inputs (cheap labor, motorbikes) in tandem with basic technologies has allowed them to deliver e-commerce and claim back a competitive advantage that is often associated with modernity. Whether smaller, independent retailers can use this movement to build on their historical advantages of location and customer service, overcome their generally higher price (given their smaller scale of operations), and defend their position in the Big Middle, remains an area for future research.

Finally, this study challenges the predictive power of the supermarketization literature rooted in the work of Reardon et al. (2003). This strand of the literature embeds a narrative of modernity, which predicts that supermarkets will eventually overtake every market. Lebanon's experience has run counter to this narrative in times of stability – when the growth of supermarkets lagged behind expectations (Seyfert et al., 2014) – and appears poised to do so in crisis, as economic collapse erodes the foundation of rising middle-class incomes on which supermarkets build in developing countries. It remains to be seen whether

a narrative of retail fluidity and fragmentation (Herbert et al., 2018) can offer a superior explanation of Lebanon's past and future retail evolution.

Managerial Implications: This study provides detailed insights into the perspective of Lebanese consumers, with clear implications for retail managers. As the long-term effects of COVID-19 linger and Lebanon's economy continues to crumble, retailer managers can translate a greater awareness of the food shopping behaviors of consumers and the dominant factors that motivate their choice of food retailers to tailor their offer in a particularly challenging competitive environment. Consumers' rising preoccupation with price and value for money suggests renewed attention to not only delivering lower-cost options, but also doing so clearly and in ways that do not exacerbate sentiments of price manipulation. For managers of modern retail formats, convenience, product assortment, and store environment may remain points of strength on which to build in the future. Managers of traditional retail formats could similarly build on their perceived advantages in terms of product quality, flexibility, and customer service.

Directions for Future Research: This study suggests multiple avenues for future research. This study could be extended to assess consumer food shopping behaviors and attitudes as Lebanon's economic crisis continues to unravel, as perceptions evolve, and as the food retail landscape inevitably shifts. Such research could be useful to understand which changes have been durable or temporary, and to identify future shifts in their trajectory as well as implications for the supermarketization process. A further extension would be to reach different segments or a more representative sample of Lebanon's consumers to include those beyond the capacities of the current research team, including consumers of more diverse socio-economic status.

Conclusion

This research set out to explore the food retail landscape in Lebanon, with a focus on food retail transformation and the supermarketization phenomenon; to understand whether the Lebanese case represents an example of the resistance of traditional retail to the domination of modern retail in a developing country context; and to demonstrate that food retail transformation is a function of factors already identified in the literature (notably product assortment and price) but also of socio-cultural considerations specific to the context in which it takes place. This research has also explored the barriers to supermarket expansion in Lebanon by exploring the meanings of retail formats and their offerings, the cultural resources they provide, and the way consumers animate these.

This research has been conducted as four articles that individually and jointly offer strong contributions, both academic and managerial.

Theoretical Contributions

The process of supermarketization in developing countries has given rise to an abundant literature offering various theoretical perspectives and case studies to assess their robustness in various contexts. The current research allows us to contribute to this literature through four component articles.

1. **Can Existing Theories Explain Food Retail Transformation in Developing Countries? An Investigation in the Lebanese Context**

We proposed in this article a comprehensive review of the mainstream literature integrating key strands from distinct academic disciplines, including major contributions relevant to the topic of supermarketization. This review spanned classical marketing theories that seek to explain retail evolution (the Wheel of Retailing), and more recent theories that build on or enrich earlier conceptualizations (the Big Middle and Consumer Culture Theory). The article also reviewed the supermarketization literature developed by Goldman and Reardon that focuses specifically on food retail transformation in developing country contexts, and identified important points of convergence and distinction.

The research then drew on secondary data from Lebanon to test the explanatory power of these theories and demonstrate that the leading current theories fail to explain retail landscape transformation in developing countries like Lebanon. Instead, this analysis suggests that the socio-cultural approach embodied in Consumer Culture Theory, when overlaid with the Big Middle, may offer a better and more compelling understanding of the retail transformation process and merits further exploration.

The contributions of this article are primarily academic. It offers an original, combinatory synthesis of the literature on retail evolution and supermarketization, identifying commonalities and synthesizing their respective strengths to explore their relevance to a developing country context. The synthesis of major research strands provides researchers a means to conceptualize the evolution and status of the food retail sector in developing country contexts. This article has particular pedagogical value as a concise synthesis that may be useful as a teaching tool.

2. Food Retailing and Supermarketization in Lebanon: Shopping Behaviors among Leading-Edge Consumers

In this article, we proposed an empirical examination of Lebanese consumers' patronage of and attitudes toward modern versus traditional format food retailers, as a means to test existing theories of retail evolution and supermarketization. This article draws on an economic literature that uses models to explain macro-level food retail transformation as well as modern marketing studies that look at the factors that determine why a consumer frequents one retailer or another. The article built on a survey of more than 200 urban, higher-income consumers who should comprise the leading-edge of supermarketization in Lebanon. Results showed that Lebanon's leading-edge consumers overwhelmingly shop at supermarkets as the primary source for at least a single food category, but simultaneously exhibit strong intertype cross-shopping behaviors. A reliance on traditional retail outlets as the major source of fresh products and supermarkets as the primary source of processed and non-perishable foods is shown to be consistent with predictions of product-based adoption of supermarkets (Goldman *et al.*, 2002; Reardon *et al.*, 2007). As for attitudes, leading-edge consumers' reportedly favorable view of supermarkets are shown to be not fully consistent with their cross-shopping behaviors.

Therefore, this research provides empirical evidence that even the leading edge of Lebanese consumers have yet to abandon traditional food retail formats, and that the Lebanese market remains far from a complete food retail transformation. In doing so, this article identifies the Lebanese case as an example of the resistance of traditional retail to the domination of modern retail, contributing to a counter-narrative that challenges the reading of supermarketization as an unavoidable wave crashing over developing countries.

In uniting the application of macro-level models of food retail transformation with more modern marketing studies of consumer preferences, this article finds that they are generally consistent. Yet, the factors examined in this study of Lebanese leading-edge consumers fail to explain the observed gap between their reportedly favorable attitudes towards supermarkets and continued reliance on traditional retailers. This result implies there are other elements missing that merit further exploration to understand the slow pace of supermarketization in Lebanon, such as the socio-cultural aspect of food shopping that has been neglected in the retail literature.

Finally, a further contribution is rooted in the unique context of this study. This article provides a detailed exploration of food shopping patterns and the supermarketization process in an under-studied context, Lebanon. Moreover, it may serve as a baseline for comparison in assessing shifts in consumer behavior that may result from the recent, extensive, and overlapping crises occurring in Lebanon.

3. Hybridization of Lebanon's Food Retail Landscape? Observations of Modern Food Retailers' Offer to Consumers

The third article in this research offers another but distinct empirical study as a means to test the role of socio-cultural considerations in driving or impeding food retail transformation, through a focus on modern format retailers' offer to Lebanese consumers within the store environment. The study built on a diverse literature including a socio-cultural reading of the Big Middle framework, studies of supermarketization, and examinations of retail hybridization and glocalization. Qualitative methods were then applied in the

form of structured observations of modern food retailers operating in Beirut, Lebanon. The structured observations and their analysis revealed several key points of comparison and distinction among modern food retailers spanning format types (hypermarket, supermarket, and discount store) and ownership origins (international and local).

The principal theoretical contribution of this work is to apply the concepts of retail transformation, internationalization, hybridization, and glocalization to the context of food retail in Lebanon, in an effort to help build the wider understanding of the complexity of global flows (in this case, focused on the flows of food retail formats). The analysis of modern food retailers' offer to customers as presented in this article suggests that modern food retailers in Lebanon indeed reflect a movement towards the Big Middle, while adjusting their offer marginally as predicted by Consumer Culture Theory. Variation in store atmosphere indeed suggests that modern format retailers consider socio-cultural factors to orient their offer to customers and gain or retain market share within the Lebanese context. In this, the results of the study are found to be generally consistent with the glocalization and hybridization strands of the literature, in that modern retailers show signs of both adaptation to local market demands, as well as actions that shape the market to align with their (international) offer. Nevertheless, the relative homogeneity of the offer does not provide conclusive evidence of the development of new formats within modern retail, or to support the prediction of Herbert *et al.* (2018) that the retail landscape will become increasingly fragmented as retailers adjust their formats to align with evolving consumer preferences.

Methodologically, this article moves beyond the existing quantitative evidence to explore what various food retailers offer to the Lebanese consumer and document a detailed, micro-level view of the food retail landscape in Lebanon. The application of structured observations, which are a well-established method in fields such as management, to assess the relative offer of food retailers is relatively novel. In doing so, this article addresses the need for greater knowledge of market-based food retailing within developing countries and their contribution to the wider food environment (Turner *et al.*, 2018). Documenting food retail environments as they exist is important to understand longer-term evolution in food retail environments. Moreover, due to the timing of the observations underpinning this article – at the onset of the COVID-19 pandemic and economic crisis – this research provides a useful snapshot of the food retail environment in Lebanon at a unique moment in time.

4. Food Shopping in Crisis: The Combined Effects of Revolution, Economic Collapse, and COVID-19 on Food Shopping Behaviors and Attitudes in Lebanon

With this fourth article, we proposed a final empirical examination, this time to examine how consumers animate the offerings and cultural resources provided by retailers even in a crisis context. This article has drawn on the literature on retail evolution and supermarketization in developing country contexts, with a focus on the impact of crisis on these transformations. This study applied qualitative methods in the form of semi-structured interviews with Lebanese consumers to reach its objectives. The results show that Lebanese consumers make sense of the food shopping experience as one of more than a simple exchange of goods for money, in line with the predictions of a socio-cultural reading of the Big Middle framework. Crises have provoked important changes in consumers' food shopping behaviors and attitudes, reinforcing the importance of price but not eliminating the meaning-making aspect of interaction with food retailers. The growing importance of price, and the ability of traditional retailers to

adapt to evolving market conditions such as the need for delivery, hint at potential changes for the longer-term trajectory of supermarketization in Lebanon.

In this, the article first contributes to the literature by providing further evidence to demonstrate that food retail transformation is a function of factors already identified in the literature (notably product assortment and price) as well as socio-cultural considerations. Moreover, by conducting this study in crisis-plagued Lebanon, this research contributes a unique insight: This research has found that crisis may test, but not eliminate, the value that consumers derive from the socio-cultural resources provided by food retailers.

A second, related contribution of this article is to confront the dominant modernization narrative underpinning the supermarketization literature. It does so both in its confirmation that socio-cultural considerations offer some explanation for the resistance of traditional retail to the domination of modern retail in this developing country context; and in its revelation that Lebanon's traditional retailers are deploying creative solutions to enhance their offer to consumers and challenge the technological comparative advantage assumed of modern retailers.

This article also contributes to the emerging literature on the impact of crisis on food consumption, food environments, and food retail transformation, gaps in which have been exposed by the COVID-19 pandemic. This study is among, if not the first, to offer an in-depth, qualitative examination of Lebanese consumers' food shopping behaviors and attitudes, and serves as a useful complement to emerging, quantitatively based studies (e.g., Ben Hassen et al., 2022). This article widens its focus beyond a concentration on COVID-19 to consider the implications of overlapping crises in the Lebanese context, one of the worst economic contractions in modern history. This wider scope contributes to a still-limited literature that explores the intersection of crisis and food retail transformation (e.g., Ang et al., 2000; Maumbe & Chikoko, 2020; Zurawicki & Braidot, 2005). Accordingly, this study may be useful to other researchers who seek to understand the interaction between severe or coincident crises, changes in consumer food shopping behaviors, and food retail transformation in other crisis-affected developing country contexts.

Managerial Contributions

For food retail managers, the phenomenon of supermarketization matters as it is their business in question. The current research, in its exploration of supermarketization, allows us to derive implications for retail managers from each of the four component articles.

1. **Can Existing Theories Explain Food Retail Transformation in Developing Countries? An Investigation in the Lebanese Context**

This article, structured as a comprehensive review and applied test of the mainstream literature on retail transformation and supermarketization, demonstrates that the leading current theories fail to explain retail landscape transformation in developing countries like Lebanon. Instead, this analysis suggests that a socio-cultural reading of the Big Middle framework, may offer a better and more compelling understanding of the retail transformation process and merits further exploration. If the principal contributions of this article are academic, there are also managerial implications insofar as retailers may benefit from a clearer understanding of forces underpinning (or inhibiting) the entry and growth of

modern format retail in developing country contexts like Lebanon. Retail managers – whether modern or traditional – also benefit from this work that suggests that, beyond product assortment and price, socio-cultural factors may represent an opportunity to appeal to consumers and gain market share in Lebanon and similar developing country markets.

2. Food Retailing and Supermarketization in Lebanon: Shopping Behaviors among Leading-Edge Consumers

This article offers an empirical examination of Lebanese consumers' patronage of and attitudes toward modern versus traditional format food retailers. It revealed that Lebanon's leading-edge consumers overwhelmingly shop at supermarkets as the primary source for at least a single food category, but simultaneously exhibit strong intertype cross-shopping behaviors: They rely on traditional retail outlets as the major source of fresh products and supermarkets as the primary source of processed and non-perishable foods. As for attitudes, leading-edge consumers' reportedly favorable view of supermarkets are found to be not fully consistent with their cross-shopping behaviors.

From a managerial perspective, the results of this study may be practically useful for retail managers pursuing consumer-oriented business strategies. In choosing where to buy food, leading-edge consumers emphasize the quality of products, range of products available, store location, store reputation, and food safety standards, judging these to be of greater importance than price of products, availability of specialty products, or store loyalty programs. Additionally, this study suggests that supermarkets' perceived offer aligns well with the stated preferences of leading-edge consumers, suggesting that there is (or was, prior to Lebanon's overlapping crises) continued scope for supermarkets to continue their penetration of this (urban, higher-income) market segment. Nevertheless, supermarkets have been unable to penetrate fully the market as even vanguard consumers continue to frequent traditional retailers particularly for perishable products, highlighting the importance of this product segment for retail managers and the possibility to benchmark the quality of their offer to that of traditional retailers.

3. Hybridization of Lebanon's Food Retail Landscape? Observations of Modern Food Retailers' Offer to Consumers

This empirical study documented modern format retailers' offer to Lebanese consumers within the store environment as a means to understand the role of socio-cultural considerations in driving or impeding food retail transformation in this developing country. The structured observations and their analysis revealed several key points of comparison and distinction among modern food retailers spanning format types (hypermarket, supermarket, and discount store) and ownership origins (international and local). Evidence of variation in store atmosphere indeed suggests that modern format retailers consider socio-cultural factors to orient their offer to customers and gain or retain market share within the Lebanese context.

Lebanon's modern food retailers compete against not only traditional food retailers but also each other. From a managerial perspective, an in-depth examination of retailers' comparative offer may be useful both to those retailers observed, confirming that observations align with their business model or reveal deviations, as well as other retailers that may have fresh insights into the competitive retail landscape. Analysis of the competitive landscape can therefore be useful to inform and refine their offer to customers

in terms of product assortment, prices, as well as socio-cultural resources such as store atmosphere that are largely under the control of managers (Grewal *et al.*, 2003; Seock & Lin, 2011). This analysis of the competitive landscape may be particularly important as Lebanon eventually emerges from its current economic contraction, per capita (food) spending once again increases, and retailers have a growing incentive to strengthen their competitive positions to benefit from rising sales (Dawson, 2013).

4. **Food Shopping in Crisis: The Combined Effects of Revolution, Economic Collapse, and COVID-19 on Food Shopping Behaviors and Attitudes in Lebanon**

The fourth article within this research examined how Lebanese consumers animate the offerings and cultural resources provided by food retailers, even in a crisis context. The individual interviews with Lebanese consumers reveal that they understand the food shopping experience as one of more than a simple exchange of goods for money, and choose to patronize modern or traditional retailers on the basis of not only product assortment and price but also the wider range of socio-cultural resources offered including store environment, relationships, and trust. If crisis has brought price to the fore, it has not yet eclipsed these other considerations. The ability of traditional retailers to adapt to evolving market conditions such as the need for delivery, demonstrate their latest form of resistance to the supermarketization process in Lebanon.

Accordingly, this study provides detailed insights into the perspective of Lebanese consumers, with clear implications for retail managers. As the long-term effects of COVID-19 linger and Lebanon's economy continues to crumble, retailer managers can translate a greater awareness of the food shopping behaviors of consumers and the dominant factors that motivate their choice of food retailers to tailor their offer in a particularly challenging competitive environment. Consumers' rising preoccupation with price and value for money suggests renewed attention to delivering lower-cost options, and doing so clearly and in ways that do not exacerbate fears of price manipulation. This research suggests that, for managers of modern retail formats, convenience, product assortment, and store environment may remain points of strength on which to build in the future. Managers of traditional retail formats could similarly build on their perceived advantages in terms of product quality, flexibility, and customer service.

Concluding Thoughts

Globally, this research has sought to examine the evolution of food retail landscapes in developing countries by looking to the case study of Lebanon. The contributions of this research include the application of uncommon theories and research from across academic disciplines as well as diverse but complementary methods to understand the phenomenon of supermarketization. This in-depth study of food retail transformation and specifically the supermarketization process focuses on the less-explored consumer perspective, and does so within an under-studied and even unique developing country context. The summation of these works offers a particularly detailed view of the food retail environment in Lebanon, with an emphasis on the modern format retail segment and leading-edge consumers.

This exploration of Lebanon's food retail landscape confirms that it represents an example of the resistance of traditional retail to the domination of modern retail in a developing country context. Moreover, by examining the meanings of Lebanon's (modern) retail formats and their offerings, the cultural resources they provide, and the way consumers are willing or able to animate them or not, this

research successfully explains this lagging food retail transformation through a socio-cultural reading of the Big Middle framework.

As noted in the introduction to this thesis research, the process of supermarketization has practical, real-world importance because the entry and growth of modern food retail has significant impacts on food systems and actors therein, ranging from producers to consumers. This research provides evidence of an impeded supermarketization process in Lebanon, both before the onset of overlapping crises in 2019 and confirmed in the consumer voices recorded amid crisis. Understanding the extent of supermarket penetration, the path of its progression in line with established expansion patterns, and deviations from those patterns can help retailers to understand the potential for future growth in the (Lebanese) market and to refine their market strategies to current institutional and socio-cultural realities. Whether modern retailers will come to dominate the market will depend on their ability to navigate an uncertain, complex, and fast-moving competitive landscape to reach beyond the initial urban, higher income segments and to capture share from traditional retailers in those (nearly always) difficult to reach perishable food categories. For public policy-makers, this research demonstrates the persistent complementarity of traditional and modern food retail in Lebanon. It also offers insights that may inform public policies targeting food retail – from support of foreign direct investment to protections for the traditional retail segment – and so increase food security, deliver food safety, and beyond.

Fundamentally, the importance of this study lies in the belief that a deeper understanding of retail offer and the motivations behind food shopping can be crucial in delivering a food (retail) system that better responds to consumer needs and demands, in reshaping the Lebanese food system during and post-crisis, and in informing public policy related to food systems. By providing an in-depth examination of Lebanon's food retail landscape, this research will ideally ground future works that guide the continued evolution of Lebanon's food environment for the greater good.

Conclusion (langue française)

Cette recherche visait à explorer le paysage de la vente au détail de produits alimentaires au Liban, en mettant l'accent sur la transformation de la vente au détail de produits alimentaires et le phénomène de supermarketisation ; comprendre si le cas libanais représente un exemple de la résistance du commerce de détail traditionnel à la domination du commerce de détail moderne dans un contexte de pays en développement ; et de démontrer que la transformation de la distribution alimentaire est fonction de facteurs déjà identifiés dans la littérature (notamment l'assortiment et le prix des produits) mais aussi de considérations socioculturelles propres au contexte dans lequel elle s'inscrit. Cette recherche a également exploré les obstacles à l'expansion des supermarchés au Liban en explorant les significations des formats de vente au détail et de leurs offres, les ressources culturelles qu'ils fournissent et la manière dont les consommateurs les animent.

Cette recherche a été menée sous la forme de quatre articles qui individuellement et conjointement offrent de fortes contributions, tant académiques que managériales.

Apports théoriques

Le processus de supermarketisation dans les pays en développement a donné lieu à une littérature abondante offrant diverses perspectives théoriques et études de cas pour évaluer leur robustesse dans divers contextes. La recherche actuelle nous permet de contribuer à cette littérature à travers quatre articles constitutifs.

1. **Les théories existantes peuvent-elles expliquer la transformation de la distribution alimentaire dans les pays en développement ? Une enquête dans le contexte libanais**

Nous avons proposé dans cet article une revue complète de la littérature grand public intégrant les principaux volets de disciplines académiques distinctes, y compris les contributions majeures pertinentes au sujet de la supermarketisation. Cette revue a couvert les théories classiques du marketing qui cherchent à expliquer l'évolution de la vente au détail (la roue de la vente au détail) et les théories plus récentes qui s'appuient sur ou enrichissent les conceptualisations antérieures (la théorie du Big Middle et de la culture de consommation). L'article a également passé en revue la littérature sur la supermarketisation développée par Goldman et Reardon qui se concentre spécifiquement sur la transformation de la vente au détail de produits alimentaires dans les contextes des pays en développement, et a identifié d'importants points de convergence et de distinction.

La recherche s'est ensuite appuyée sur des données secondaires du Liban pour tester le pouvoir explicatif de ces théories et démontrer que les principales théories actuelles ne parviennent pas à expliquer la transformation du paysage de la vente au détail dans les pays en développement comme le Liban. Au lieu de cela, cette analyse suggère que l'approche socioculturelle incarnée dans la théorie de la culture de consommation, lorsqu'elle est superposée au Big Middle, peut offrir une compréhension meilleure et plus convaincante du processus de transformation du commerce de détail et mérite une exploration plus approfondie.

Les contributions de cet article sont essentiellement académiques. Il propose une synthèse combinatoire originale de la littérature sur l'évolution du commerce de détail et la supermarketisation, identifiant les points communs et synthétisant leurs forces respectives pour explorer leur pertinence dans le contexte d'un pays en développement. La synthèse des principaux axes de recherche fournit aux chercheurs un moyen de conceptualiser l'évolution et le statut du secteur de la vente au détail de produits alimentaires dans les contextes des pays en développement. Cet article a une valeur pédagogique particulière en tant que synthèse concise qui peut être utile comme outil pédagogique.

2. Commerce de détail alimentaire et supermarketisation au Liban : comportements d'achat des consommateurs partisans

Dans cet article, nous avons proposé un examen empirique de la fréquentation et des attitudes des consommateurs libanais envers les détaillants alimentaires modernes par rapport aux formats traditionnels, comme moyen de tester les théories existantes sur l'évolution de la vente au détail et la supermarketisation. Cet article s'appuie sur une littérature économique qui utilise des modèles pour expliquer la transformation de la distribution alimentaire au niveau macro ainsi que sur des études de marketing modernes qui examinent les facteurs qui déterminent pourquoi un consommateur fréquente un détaillant ou un autre. L'article s'appuie sur une enquête auprès de plus de 200 consommateurs urbains à revenu élevé qui devraient constituer l'avant-garde de la supermarketisation au Liban. Les résultats ont montré que les consommateurs libanais partisans achètent massivement dans les supermarchés comme source principale pour au moins une seule catégorie d'aliments, mais présentent simultanément de forts comportements d'achats croisés intertypes. Le recours aux points de vente au détail traditionnels comme principale source de produits frais et aux supermarchés comme principale source d'aliments transformés et non périssables s'avère cohérent avec les prévisions d'adoption des supermarchés en fonction des produits (Goldman et al., 2002 ; Reardon et al., 2007). En ce qui concerne les attitudes, la vision apparemment favorable des consommateurs haut de gamme à l'égard des supermarchés ne correspond pas entièrement à leurs comportements d'achats croisés.

Par conséquent, cette recherche fournit des preuves empiriques que même les consommateurs libanais les plus avancés n'ont pas encore abandonné les formats traditionnels de vente au détail de produits alimentaires et que le marché libanais reste loin d'une transformation complète de la vente au détail de produits alimentaires. Ce faisant, cet article identifie le cas libanais comme un exemple de la résistance du commerce de détail traditionnel à la domination du commerce de détail moderne, contribuant à un contre-récit qui remet en question la lecture de la supermarketisation comme une vague inéluctable déferlant sur les pays en développement.

En unissant l'application de modèles macro-économiques de transformation de la vente au détail de produits alimentaires à des études marketing plus modernes sur les préférences des consommateurs, cet article constate qu'ils sont généralement cohérents. Et pourtant, les facteurs examinés dans cette étude sur les consommateurs libanais partisans ne permettent pas d'expliquer l'écart observé entre leurs attitudes apparemment favorables à l'égard des supermarchés et leur dépendance continue à l'égard des détaillants traditionnels. Ce résultat implique qu'il manque d'autres éléments qui méritent une exploration plus approfondie pour comprendre la lenteur de la supermarketisation au Liban, comme

l'aspect socioculturel des comportements d'achats alimentaires qui a été négligé dans la littérature sur la vente au détail.

Enfin, une autre contribution s'enracine dans le contexte unique de cette étude. Cet article propose une exploration détaillée des modèles d'achats alimentaires et du processus de supermarketisation dans un contexte sous-étudié, le Liban. En outre, il peut servir de base de comparaison pour évaluer les changements de comportement des consommateurs qui peuvent résulter de crises récentes, étendues et qui se chevauchent qui se sont produites au Liban.

3. Hybridation du paysage de la distribution alimentaire au Liban ? Observations de l'offre des détaillants alimentaires modernes aux consommateurs

Le troisième article de cette recherche propose une autre étude empirique, mais distincte, comme moyen de tester le rôle des considérations socioculturelles dans la conduite ou l'entrave de la transformation du commerce de détail alimentaire, en mettant l'accent sur l'offre des détaillants de format moderne aux consommateurs libanais dans l'environnement du magasin. L'étude s'est appuyée sur une littérature diversifiée, y compris une lecture socioculturelle du cadre du Big Middle, des études sur la supermarketisation et des examens de l'hybridation et de la glocalisation de la vente au détail. Des méthodes qualitatives ont ensuite été appliquées sous la forme d'observations structurées de détaillants alimentaires modernes opérant à Beyrouth, au Liban. Les observations structurées et leur analyse ont révélé plusieurs points clés de comparaison et de distinction entre les détaillants alimentaires modernes couvrant les types de format (hypermarché, supermarché et magasin discount) et les origines de propriété (internationales et locales).

La principale contribution théorique de ce travail est d'appliquer les concepts de transformation du commerce de détail, d'internationalisation, d'hybridation et de glocalisation au contexte du commerce de détail alimentaire au Liban, dans le but d'aider à mieux comprendre la complexité des flux mondiaux (dans ce cas, centrée sur les flux des formats de distribution alimentaire). L'analyse de l'offre des détaillants alimentaires modernes aux clients telle que présentée dans cet article suggère que les détaillants alimentaires modernes au Liban reflètent en effet un mouvement vers le Big Middle, tout en ajustant leur offre à la marge comme le prédit la théorie de la culture de consommation. La variation de l'ambiance des magasins suggère en effet que les détaillants de format moderne tiennent compte des facteurs socioculturels pour orienter leur offre vers les clients et gagner ou conserver des parts de marché dans le contexte libanais. En cela, les résultats de l'étude s'avèrent généralement cohérents avec les courants de glocalisation et d'hybridation de la littérature, en ce sens que les détaillants modernes montrent à la fois des signes d'adaptation aux demandes du marché local, ainsi que des actions qui façonnent le marché pour s'aligner sur leur offre (internationale). Néanmoins, la relative homogénéité de l'offre n'apporte pas de preuve concluante du développement de nouveaux formats au sein du commerce moderne, ni pour étayer la prédiction d'Herbert *et al.* (2018) que le paysage de la vente au détail deviendra de plus en plus fragmenté à mesure que les détaillants ajusteront leurs formats pour s'aligner sur l'évolution des préférences des consommateurs.

Sur le plan méthodologique, cet article va au-delà des preuves quantitatives existantes pour explorer ce que divers détaillants alimentaires offrent au consommateur libanais et documenter une vue détaillée au niveau micro du paysage de la vente au détail de produits alimentaires au Liban. L'application

d'observations structurées, qui sont une méthode bien établie dans des domaines tels que la gestion, pour évaluer l'offre relative des détaillants alimentaires est relativement nouvelle. Ce faisant, cet article aborde la nécessité d'une meilleure connaissance de la vente au détail de produits alimentaires basée sur le marché dans les pays en développement et de leur contribution à l'environnement alimentaire plus large (Turner *et al.*, 2018). Il est important de documenter les environnements de vente au détail de produits alimentaires tels qu'ils existent pour comprendre l'évolution à plus long terme des environnements de vente au détail de produits alimentaires. De plus, en raison du calendrier des observations qui sous-tendent cet article - au début de la pandémie de COVID-19 et de la crise économique - cette recherche fournit un instantané utile de l'environnement de la vente au détail de produits alimentaires au Liban à un moment unique dans le temps.

4. Achats alimentaires en crise : les effets combinés de la révolution, de l'effondrement économique et du COVID-19 sur les comportements et les attitudes d'achat alimentaire au Liban

Avec ce quatrième article, nous avons proposé un dernier examen empirique, cette fois pour examiner comment les consommateurs animent les offres et les ressources culturelles fournies par les détaillants même dans un contexte de crise. Cet article s'est inspiré de la littérature sur l'évolution du commerce de détail et de la supermarketisation dans les contextes des pays en développement, en mettant l'accent sur l'impact de la crise sur ces transformations. Cette étude a appliqué des méthodes qualitatives sous forme d'entretiens semi-structurés avec des consommateurs libanais pour atteindre ses objectifs. Les résultats montrent que les consommateurs libanais conçoivent l'expérience d'achat alimentaire comme plus qu'un simple échange de biens contre de l'argent, conformément aux prédictions d'une lecture socioculturelle du cadre Big Middle. Les crises ont provoqué des changements importants dans les comportements et les attitudes des consommateurs en matière d'achat de produits alimentaires, renforçant l'importance du prix mais n'éliminant pas l'aspect porteur de sens de l'interaction avec les détaillants alimentaires. L'importance croissante du prix et la capacité des détaillants traditionnels à s'adapter à l'évolution des conditions du marché, telles que les besoins de livraison, laissent entrevoir des changements potentiels pour la trajectoire à plus long terme de la supermarketisation au Liban.

En cela, l'article contribue d'abord à la littérature en fournissant des preuves supplémentaires pour démontrer que la transformation de la distribution alimentaire est fonction de facteurs déjà identifiés dans la littérature (notamment l'assortiment de produits et le prix) ainsi que de considérations socioculturelles. De plus, en menant cette étude dans un Liban en proie à la crise, cette recherche apporte un aperçu unique : cette recherche a révélé que la crise peut tester, mais pas éliminer, la valeur que les consommateurs tirent des ressources socioculturelles fournies par les détaillants alimentaires.

Une deuxième contribution de cet article consiste à confronter le récit dominant de la modernisation qui sous-tend la littérature sur la supermarketisation. Il le fait à la fois dans la confirmation que les considérations socioculturelles offrent une explication de la résistance du commerce de détail traditionnel à la domination du commerce de détail moderne dans ce contexte de pays en développement ; et dans sa révélation que les détaillants traditionnels du Liban déploient des solutions créatives pour améliorer leur offre aux consommateurs et remettre en question l'avantage comparatif technologique supposé des détaillants modernes.

Cet article contribue également à la littérature émergente sur l'impact de la crise sur la consommation alimentaire, les environnements alimentaires et la transformation de la vente au détail de produits alimentaires, dont les lacunes ont été révélées par la pandémie de COVID-19. Cette étude est parmi les premières, sinon la première, à proposer un examen qualitatif approfondi des comportements et des attitudes des consommateurs libanais en matière d'achat de produits alimentaires, et constitue un complément utile aux études émergentes basées sur des données quantitatives (par exemple, Ben Hassen *et al.*, 2022). Cet article élargit son champ d'action au-delà d'une concentration sur le COVID-19 pour examiner les implications des crises qui se chevauchent dans le contexte libanais, l'une des pires contractions économiques de l'histoire moderne. Cette portée plus large contribue à une littérature encore limitée qui explore l'intersection de la crise et de la transformation de la distribution alimentaire (par exemple, Ang *et al.*, 2000 ; Maumbe & Chikoko, 2020 ; Zurawicki & Braidot, 2005). En conséquence, cette étude peut être utile à d'autres chercheurs qui cherchent à comprendre l'interaction entre les crises graves ou coïncidentes, les changements dans les comportements d'achat des consommateurs et la transformation de la vente au détail de produits alimentaires dans d'autres contextes de pays en développement touchés par la crise.

Apports managériaux

Pour les managers de la grande distribution alimentaire, le phénomène de la supermarketisation est important car il s'agit de leur métier. La recherche actuelle, dans son exploration de la supermarketisation, nous permet de tirer des implications pour les gestionnaires de détail de chacun des quatre articles constitutifs.

1. **Les théories existantes peuvent-elles expliquer la transformation de la distribution alimentaire dans les pays en développement ? Une enquête dans le contexte libanais**

Cet article, structuré comme une revue complète et un test appliqué de la littérature grand public sur la transformation du commerce de détail et la supermarketisation, démontre que les principales théories actuelles ne parviennent pas à expliquer la transformation du paysage du commerce de détail dans les pays en développement comme le Liban. Au lieu de cela, cette analyse suggère qu'une lecture socioculturelle du cadre Big Middle peut offrir une compréhension meilleure et plus convaincante du processus de transformation du commerce de détail et mérite une exploration plus approfondie. Si les principales contributions de cet article sont académiques, il y a aussi des implications managériales dans la mesure où les détaillants peuvent bénéficier d'une meilleure compréhension des forces qui sous-tendent (ou inhibent) l'entrée et la croissance du commerce de détail de format moderne dans des contextes de pays en développement comme le Liban. Les responsables de commerces de détail – qu'ils soient modernes ou traditionnels – bénéficient également de ces travaux qui suggèrent qu'au-delà de l'assortiment et du prix des produits, les facteurs socioculturels peuvent représenter une opportunité d'attirer les consommateurs et de gagner des parts de marché au Liban et sur des marchés similaires dans les pays en développement.

2. **Commerce de détail alimentaire et supermarketisation au Liban : comportements d'achat des consommateurs partisans**

Cet article propose un examen empirique de la fréquentation et des attitudes des consommateurs libanais envers les détaillants alimentaires modernes par rapport aux formats traditionnels. Il a révélé que les consommateurs libanais partisans achètent massivement dans les supermarchés comme principale source d'au moins une catégorie d'aliments, mais présentent simultanément de forts comportements d'achats croisés intertypes : ils s'appuient sur les points de vente traditionnels comme principale source de produits frais et sur les supermarchés comme la principale source d'aliments transformés et non périssables. En ce qui concerne les attitudes, la vision apparemment favorable des consommateurs haut de gamme à l'égard des supermarchés ne correspond pas entièrement à leurs comportements d'achats croisés.

D'un point de vue managérial, les résultats de cette étude peuvent être pratiquement utiles pour les directeurs des enseignes de vente au détail poursuivant des stratégies commerciales axées sur le consommateur. En choisissant où acheter de la nourriture, les consommateurs avant-gardistes mettent l'accent sur la qualité des produits, la gamme de produits disponibles, l'emplacement du magasin, la réputation du magasin et les normes de salubrité des aliments, les jugeant plus importantes que le prix des produits, la disponibilité des produits de spécialité, ou des programmes de fidélisation des magasins. De plus, cette étude suggère que l'offre perçue des supermarchés s'aligne bien sur les préférences déclarées des consommateurs partisans, ce qui suggère qu'il existe (ou avait existé, avant les crises qui se chevauchent au Liban) une possibilité continue pour les supermarchés de poursuivre leur pénétration de ce segment de marché (urbain, à revenu élevé). Néanmoins, les supermarchés n'ont pas été en mesure de pénétrer pleinement le marché car même les consommateurs d'avant-garde continuent de fréquenter les détaillants traditionnels, en particulier pour les produits périssables, soulignant l'importance de ce segment de produits pour les responsables de la distribution et la possibilité de comparer la qualité de leur offre à celle des détaillants traditionnels.

3. **Hybridation du paysage de la distribution alimentaire au Liban ? Observations de l'offre des détaillants alimentaires modernes aux consommateurs**

Cette étude empirique a documenté l'offre des détaillants de format moderne aux consommateurs libanais dans l'environnement du magasin comme un moyen de comprendre le rôle des considérations socioculturelles dans la conduite ou l'entrave de la transformation de la vente au détail de produits alimentaires dans ce pays en développement. Les observations structurées et leur analyse ont révélé plusieurs points clés de comparaison et de distinction entre les détaillants alimentaires modernes couvrant les types de format (hypermarché, supermarché et magasin discount) et les origines de propriété (internationales et locales). Les preuves de la variation de l'atmosphère des magasins suggèrent en effet que les détaillants de format moderne tiennent compte des facteurs socioculturels pour orienter leur offre vers les clients et gagner ou conserver des parts de marché dans le contexte libanais.

Les détaillants alimentaires modernes du Liban sont en concurrence non seulement avec les détaillants alimentaires traditionnels, mais aussi entre eux. D'un point de vue managérial, un examen approfondi de l'offre comparative des enseignes peut être utile à la fois aux enseignes observées, pour confirmer que les observations sont conformes à leur modèle économique ou révéler des écarts ; ainsi que d'autres

détaillants qui peuvent avoir de nouvelles perspectives sur le paysage concurrentiel de la vente au détail. L'analyse du paysage concurrentiel peut donc être utile pour informer et affiner son offre aux clients en termes d'assortiment de produits, de prix, ainsi que de ressources socio-culturelles telles que l'ambiance du magasin qui sont largement sous le contrôle des managers (Grewal *et al.*, 2003 ; Seock et Lin, 2011). Cette analyse du paysage concurrentiel peut être particulièrement importante alors que le Liban finit par sortir de sa contraction économique actuelle, les dépenses (alimentaires) par habitant augmentent à nouveau et les détaillants sont de plus en plus incités à renforcer leur position concurrentielle pour bénéficier de la hausse des ventes (Dawson, 2013).

4. **Achats alimentaires en crise : les effets combinés de la révolution, de l'effondrement économique et du COVID-19 sur les comportements et les attitudes d'achat alimentaire au Liban**

Le quatrième article de cette recherche a examiné comment les consommateurs libanais animent les offres et les ressources culturelles fournies par les détaillants alimentaires, même dans un contexte de crise. Les entretiens individuels avec des consommateurs libanais révèlent qu'ils comprennent l'expérience d'achat de produits alimentaires comme l'un des plus qu'un simple échange de biens contre de l'argent, et choisissent de fréquenter les détaillants modernes ou traditionnels sur la base non seulement de l'assortiment et du prix des produits, mais aussi de la gamme plus large des ressources socioculturelles offertes, y compris l'environnement du magasin, les relations et la confiance. Si la crise a mis le prix au premier plan, elle n'a pas encore éclipsé ces autres considérations. La capacité des détaillants traditionnels à s'adapter à l'évolution des conditions du marché, telles que le besoin de livraison, démontre leur dernière forme de résistance au processus de supermarketisation au Liban.

En conséquence, cette étude fournit des informations détaillées sur la perspective des consommateurs libanais, avec des implications claires pour les responsables de la vente au détail. Alors que les effets à long terme du COVID-19 persistent et que l'économie libanaise continue de s'effondrer, les responsables des détaillants peuvent traduire une plus grande prise de conscience des comportements d'achat alimentaire des consommateurs et des facteurs dominants qui motivent leur choix de détaillants alimentaires à adapter leur offre dans un contexte particulièrement environnement concurrentiel exigeant. La préoccupation croissante des consommateurs pour le prix et le rapport qualité-prix suggère un regain d'attention non seulement pour proposer des options à moindre coût, mais aussi pour le faire clairement et de manière à ne pas exacerber les craintes de manipulation des prix. Cette recherche suggère que, pour les gestionnaires de formats de vente au détail modernes, la commodité, l'assortiment de produits et l'environnement du magasin peuvent rester des points forts sur lesquels s'appuyer à l'avenir. Les gestionnaires de formats de vente au détail traditionnels pourraient de la même manière tirer parti de leurs avantages perçus en termes de qualité des produits, de flexibilité et de service client.

Réflexions finales

Globalement, cette recherche a cherché à examiner l'évolution des paysages de la vente au détail de produits alimentaires dans les pays en développement en se penchant sur l'étude de cas du Liban. Les contributions de cette recherche incluent l'application de théories et de recherches peu communes dans toutes les disciplines académiques ainsi que des méthodes diverses mais complémentaires pour comprendre le phénomène de la supermarketisation. Cette étude approfondie de la transformation de la vente au détail de produits alimentaires et plus particulièrement du processus de supermarketisation se

concentre sur la perspective du consommateur la moins explorée, et le fait dans un contexte de pays en développement sous-étudié et même unique. La synthèse de ces travaux offre une vision particulièrement détaillée de l'environnement de la distribution alimentaire au Liban, en mettant l'accent sur le segment de la distribution au format moderne et sur les consommateurs partisans.

Cette exploration du paysage de la vente au détail alimentaire au Liban confirme qu'il représente un exemple de la résistance du commerce de détail traditionnel à la domination du commerce de détail moderne dans un contexte de pays en développement. De plus, en examinant les significations des formats de vente au détail (modernes) du Liban et de leurs offres, les ressources culturelles qu'ils fournissent et la manière dont les consommateurs sont disposés ou capables de les animer ou non, cette recherche explique avec succès cette transformation retardée de la vente au détail alimentaire à travers un contexte socio-économique selon une lecture culturelle du cadre Big Middle.

Comme indiqué dans l'introduction de cette recherche doctorale, le processus de supermarketisation a une importance pratique et réelle, car l'entrée et la croissance de la vente au détail alimentaire moderne ont des impacts significatifs sur les systèmes alimentaires et leurs acteurs, allant des producteurs aux consommateurs. Cette recherche fournit des preuves d'un processus de supermarketisation entravé au Liban, à la fois avant le début des crises qui se chevauchent en 2019 et confirmé dans les voix des consommateurs enregistrées au milieu de la crise. Comprendre l'étendue de la pénétration des supermarchés, la voie de sa progression conformément aux schémas d'expansion établis et les écarts par rapport à ces schémas peut aider les détaillants à comprendre le potentiel de croissance future du marché (libanais) et à affiner leurs stratégies de marché aux niveaux institutionnel et actuel. La question de savoir si les détaillants modernes finiront par dominer le marché dépendra de leur capacité à naviguer dans un paysage concurrentiel incertain, complexe et en évolution rapide pour atteindre au-delà des segments initiaux urbains à revenu élevé et pour capturer la part des détaillants traditionnels dans ceux (presque toujours) catégories d'aliments périssables difficiles à atteindre. Pour les décideurs publics, cette recherche démontre la complémentarité persistante de la distribution alimentaire traditionnelle et moderne au Liban. Il offre également des informations susceptibles d'éclairer les politiques publiques ciblant la vente au détail de produits alimentaires - du soutien à l'investissement direct étranger aux protections pour le segment de la vente au détail traditionnelle - et ainsi d'accroître la sécurité alimentaire, d'assurer la sécurité alimentaire et au-delà.

Fondamentalement, l'importance de cette étude réside dans la conviction qu'une compréhension plus approfondie de l'offre de vente au détail et des motivations derrière les achats alimentaires peut être cruciale pour fournir un système alimentaire (de détail) qui réponde mieux aux besoins et aux demandes des consommateurs, en remodelant le système alimentaire libanais pendant et après la crise, et pour éclairer les politiques publiques liées aux systèmes alimentaires. En fournissant un examen approfondi du paysage de la vente au détail de produits alimentaires au Liban, cette recherche fondera idéalement de futurs travaux qui guideront l'évolution continue de l'environnement alimentaire du Liban pour le plus grand bien.

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