SHOPPING BEHAVIOUR OF EXPATRIATES

A cross-cultural study of American, British and Japanese expatriates in Amstelveen and Amsterdam

G.J. WIJNEN

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TU/E , STRABO, UNIBAIL-RODAMCO

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SUMMARY - ENGLISH

This research is inspired by the case of Stadshart Amstelveen, a shopping centre that is located in an area where approximately 9% of the population are expatriates. Expats are persons who have moved outside their country-of-origin to work with an (international) company that is accommodated abroad, as well as entrepreneurs with their own company abroad, and abroad residing partners and children of these groups. Apart from being highly educated their income is usually higher than average, making them an interesting target group. Since there is only limited information available on shopping behaviour of expats, especially in the Dutch context, and since insight in the heterogeneity of consumer shopping behaviour has become increasingly important for the commercial success of shopping centres, a study on the shopping behaviour of this group is very relevant in this case. Market research specialist Strabo and Unibail-Rodamco, operator of Stadshart Amstelveen, would indeed like to gain insight in the shopping behaviour of expats that live in the catchment area of that shopping centre. Additionally, awareness of the effect of culture and ethnicity on consumer behaviour and the effectiveness of culture based market segmentation are on-going relevant topics. The translation from such market segmentation strategies to the shopping environment, and especially the implications of cultural elements herein, has not yet been researched extensively. In accordance with this therefore the following research questions are posed:

Theoretical research question: How can shopping centre attributes be adapted to culture-related shopping behaviour of American, British and Japanese expatriates?

Practical research question: What can Unibail-Rodamco do in terms of shopping centre attributes to attract expatriates to shopping centre Stadshart Amstelveen?

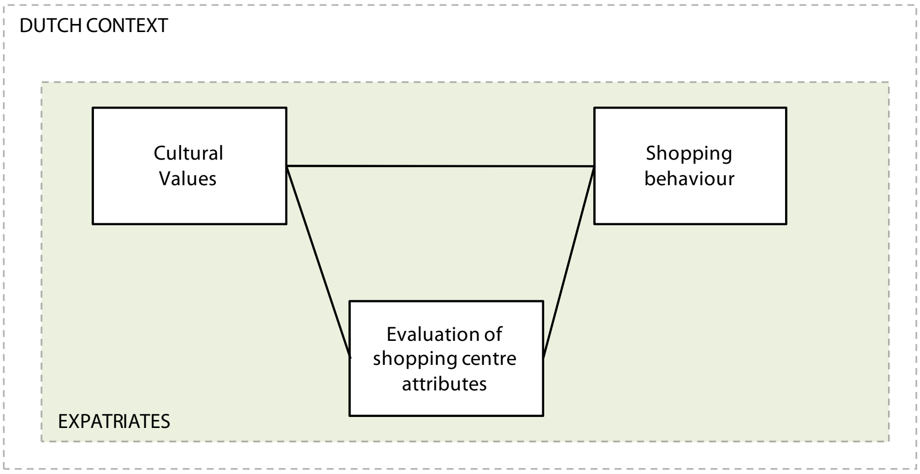


FIGURE 1 – CONCEPTUAL MODEL

The conceptual model of the research is presented in figure 1. The scope of the study is limited to American, British and Japanese expats that live in Amstelveen and Amsterdam, because these cultures are well-represented, clearly distinguishable and relatively easy to reach. The study itself exists of a literature review, in-depth interviews with expatriates and field-experts and data collection among expatriates with an online questionnaire in both English and Japanese. Several statistical analyses for differences and correlations were conducted on the results, and a comparison was made with existing data from Strabo on Dutch consumers. In addition, the data was enriched by Experian with MOSAIC household profiles to gain some insight in the role of lifestyle.

Cultural values and shopping behaviour

Shopping behaviour was defined as the outcome of an individual's decision-making process based on the evaluation of shopping centre attributes and under the influence of values and attitudes. A distinction was made between general values (measured by the List of Values) and shopping values on the one hand, and between utilitarian and hedonic shopping values on the other. Expatriates score high on the general values fun and enjoyment and warm relations, as well as on the attitudes time-awareness and product-reliability, pointing towards the idea that expatriates fit a more universal busy, adventurous and high-end lifestyle. Across cultures there are differences though. Especially the Japanese culture seems to differ from the others because of their collectivist (Asian) viewpoint and the importance of uncertainty avoidance. Japanese expatriates also seem to hold a more experiential and hedonic attitude towards shopping, while the British and Americans hold more efficient and utilitarian values. However, it has to be kept in mind that the three cultural groups are not completely equal in age, gender, household type and daily occupation, which might be an important cause for their attitude differences as well.

The actual shopping behaviour of expatriates differs from that of the Dutch with regard to visit frequency: it appeared that expatriates shop more often than the Dutch. The literature indicated that differences in shopping behaviour across cultures are the result of cultural values, cultural constraints and lifestyle. However, according to the data those differences seem more related to place of residence, household type, age and occupation.

Evaluation of shopping centre attributes

The evaluation of shopping centre attributes takes place as part of the shopping decision-making process. Cross-cultural differences regarding those evaluations can be explained by differences in cultural values, by the existing retail structure in the home-country of expats or by cultural constraints. For example, the importance of service is more related to cultural values, while opening hours are an attribute of the existing retail structure. The product assortment and brand mix that is preferred in a specific culture can have to do with cultural constraints such as cuisine and fashion style, while parking facilities may depend on constraints regarding mobility. According to the data analysis cultural constraints also seem to play a role in the evaluation of shopping centre attributes. To illustrate, the emphasis that the Japanese put on parking facilities for example seem related to their uncommonness with shopping by car, and the positive evaluation of opening hours and orientation and way-finding by the British at Stadshart is related to similarities in the retail structure between the UK and the Netherlands. On the other hand do the rather equivalent evaluations of Stadshart by expats strengthen the idea that expats have a similar reference frame because of their lifestyle.

Interrelations

In addition, there appear to be interrelations between the three variables cultural values, shopping behaviour and evaluation of shopping centre attributes. With regard to the relation between cultural values and shopping behaviour it seems that very frequent shoppers are likely to hold efficient shopping values. Dependent on the visit frequency items like opening hours and trend and fashion sensitivity are evaluated as more or less important, and the evaluations of service by personnel, atmosphere and personal space and privacy turn more negative when visit frequency increases. When shopping is perceived as a hedonic activity parking facilities, catering facilities and facilities and services and a distinctive identity become more important. The appreciation of the atmosphere, design of the centre and public space and covered shopping is also related to hedonic shopping values. Utilitarian shopping values correlate with importance of opening hours and spatial attributes, and appreciation of fundamental shopping centre attributes such as location and accessibility, parking and retail mix.

MOSAIC household profiles

From the viewpoint of lifestyle segmentation, four main MOSAIC household profiles can be distinguished among expats: Free Spirits, Educated City Dwellers, Successful Families and the Prosperous. These groups all vary in terms of life stage (from student to empty nesters) and have different decision styles (from impulsive buying behaviour to information-based decision-making with a preference for face-to-face contact). So on the one hand expatriates are a rather homegeneous group while on the other hand the subgroups are still completely different. Differences between lifestyle profiles exist regarding the importance of parking facilities, facilities and services and fashion and trend sensitivity.

Conclusion

The attributes that can be adapted to the shopping behaviour of expatriates are presented in figure 2. Just as the literature indicated, adjustments related to culture can take place on the level of the shopping centre, the store and the product assortment. Attributes that are important for the positioning of a shopping centre towards expats are location and accessibility, retail mix, opening hours of stores, atmosphere and covered shopping.

• Location and accessibility	• Design of the centre and public space
• Retail mix	• Parking facilities
- Brand mix (international)	• Sanitary facilities
- Variety of stores	• Catering facilities
- Merchandise (style, fashionability, sizing)	• Facilities for children
• Opening hours	• Leisure facilities
• Atmosphere	• Language of information
• Covered shopping	• Signage
• Service by personnel	• Promotions

FIGURE 2 – OVERVIEW OF SHOPPING CENTRE ATTRIBUTES ADAPTABLE TO EXPATRIATES

At Stadshart Amstelveen (see figure 3) opportunities for adaptation of certain attributes arise as a result of re-positioning and expansion plans. The main aspects that need to be reconsidered are retail mix, opening hours, service by personnel, fashion and trend sensitivity, catering facilities, sanitary facilities and the parking tariff. The location and accessibility, the covered shopping area, and the weekly open markets are positive attributes that should be cherished.

• Extend the opening hours during the weekends and at night	• Greater variation in gastronomy
	• Service by personnel
• Lower the parking tariff	• Ethnic food store or second supermarket
• Extra sanitary facilities	• Leisure facilities
• Mother and child friendly attitude	• Wellness facilities
• Advertisements in English	• Product selection
• Retail mix and fashion and trend sensitivity	• Offer of services

FIGURE 3 – OVERVIEW OF OPPORTUNITIES FOR UNIBAIL-RODAMCO

All in all, it seems that both lifestyle and ethnicity play a role in the process of shopping decision-making. The cross-cultural differences in shopping behaviour and attribute evaluation mostly seem to be a result of values or cultural constraints. Some of the differences across cultures though, such as visit frequency, are more a matter of place of residence, household type, age and occupation, i.e. lifestyle. On the other hand, some of these lifestyle related aspects such as place of residence and occupation culture-related to a certain extent as well. The Japanese for example prefer Amstelveen and Buitenveldert above Amsterdam city centre as a place of residence because of the special facilities for them such as schools and stores and the closeness of other Japanese expats. The British and Americans for whom the education of children and being 'in-group' is less crucial than for the Japanese, such issues are not necessarily leading in their location choice. The same applies to occupation, which can be a result of cultural constraints as well: this explains the large number of housewives among the Japanese and the time they have for shopping. On the whole, the results point towards the idea that expatriates fit a more universal profile or lifestyle, while they also underpin the importance of a marketing strategy incorporating cultural differences.

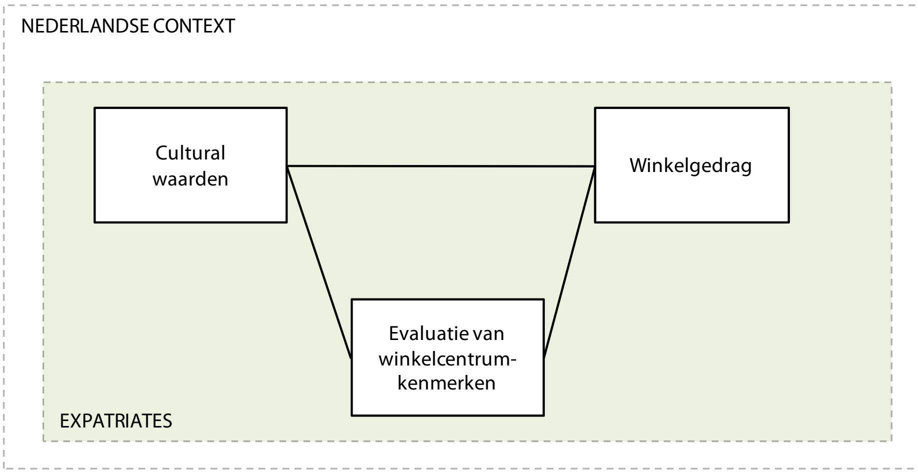
The results of this study are relevant for retailers, shopping centre developers and operators in areas with high numbers of expatriates, but also in areas that cope with (specific) groups of immigrants and from the viewpoint of (shopping) tourism. In all those cases it is vital to have insight in the cultural dimension of the market in general and in interesting ethnic niches, both in terms of ethnicity and lifestyle. The results of the study implicate that a culturally distinct target group needs to be studied in terms of values, cultural constraints and shopping behaviour, as well as in terms of shopping centre attributes that are perceived as fundamental, functional, and related to identity and space.

SAMENVATTING - NEDERLANDS

De aanleiding van dit onderzoek is Stadshart Amstelveen, een winkelcentrum dat is gelegen in een gebied waar circa 9% van de bevolking een expatriate is. Expats zijn zowel personen die buiten hun geboorteland wonen om te werken bij een (internationaal) bedrijf dat in het buitenland gevestigd is, als ook ondernemers met een eigen bedrijf in het buitenland en in het buitenland wonende partners en kinderen van deze groepen. Naast een hoog opleidingsniveau is hun inkomen gewoonlijk hoger dan gemiddeld, wat hen een interessante doelgroep maakt. Aangezien er enkel beperkte informatie beschikbaar is over het winkelgedrag van expats, met name in de Ne-derlandse context, en vanwege het grote belang van inzicht in het heterogene winkelgedrag van consumenten voor het commercieel success van winkelcentra, is een onderzoek naar het winkelgedrag van expats zeer relevant. Onderzoeksbureau Strabo en Unibail-Rodamco, de beheerder van Stadshart Amstelveen willen graag inzicht verkrijgen in het winkelgedrag van expats die wonen in het verzorgingsgebied van dit winkelcentrum. Daarnaast zijn de effecten die cultuur en ethniciteit hebben op consumentengedrag en de effectiviteit van markt-segmentatie gebaseerd op cultuur continue relevante thema's. De vertaling van dergelijke segmentatie strategieën naar de winkelomgeving, en daarbij met name de implicaties van culturele elementen, is nog niet uitgebreid onderzocht. In lijn hiermee zijn daarom de volgende onderzoeksvragen vastgesteld:

Theoretische onderzoeksvraag: Hoe kunnen winkelcentrumkenmerken aangepast worden aan het cultuurgerelateerde winkelgedrag van Amerikaanse, Britse en Japanse expatriates?

Practische onderzoeksvraag: Wat kan Unibail-Rodamco doen in termen van winkelcentrumkenmerken om expatriates naar winkelcentrum Stadshart Amstelveen te trekken?



FIGUUR 1 – CONCEPTUEEL MODEL

Het conceptueel model van dit onderzoek is weergegeven in figuur 1. Wat betreft doelgroep is het onderzoek ingekaderd tot Amerikaanse, Britse en Japanse expats woonachtig in Amstelveen en Amsterdam, aangezien deze culturen goed vertegenwoordigd, duidelijk te onderscheiden en relatief eenvoudig te bereiken zijn. Het onderzoek bestaat uit een literatuurstudie, diepte-interviews met expats en dataverzameling onder expats met een online vragenlijst in zowel Engels als Japans. Diverse statistische analyses voor verschilvragen en correlaties zijn toegepast op de resultaten en er is een vergelijking gemaakt met Nederlandse consumenten op basis van bestaande gegevens van Strabo. Daarnaast is de data verrijkt door Experian met MOSAIC huishoudensprofielen om inzicht te verkrijgen in de rol van levensstijlen.

Culturele waarden en winkelgedrag

Winkelgedrag is gedefinieerd als de uitkomst van een individueel beslissingsproces dat is gebaseerd op het evalueren van winkelcentrumkenmerken onder invloed van waarden en houdingen. Er is onderscheid gemaakt tussen algemene waarden (meetbaar door middel van de List Of Values) en de houding ten opzichte van winkelen enerzijds, en tussen een utilitaire en hedonistische houding ten opzichte van winkelen anderzijds. Expats scoren hoog op de algemene waarden 'plezier en genieten' en 'warme relaties' als ook op de houdingen 'bewustzijn van tijd' en 'betrouwbaarheid van producten', wat duidt op hun universele drukke, avontuurlijke en high-end levensstijl. Er bestaan echter wel verschillen tussen culturen. Met name de Japanse cultuur lijkt te verschillen vanwege het collectivistisch (Aziatische) perspectief en het belang van het vermijden van onzekerheid. Japanse expats lijken ook een meer hedonistische en op beleving gerichte houding te hebben ten opzichte van winkelen, terwijl Britten en Amerikanen juist een meer efficiënte en functionele houding hebben. Desondanks moeten de verschillen tussen de culturele groepen in leeftijd, geslacht, huishoudentype en dagelijkse werkzaamheden niet verwaarloosd worden als mogelijke oorzaken.

Het daadwerkelijke winkelgedrag van expats verschilt van dat van Nederlanders wat betreft bezoekfrequentie: het blijkt dat expats vaker winkelen dan Nederlanders. Volgens de literatuur kwamen de verschillen in winkelgedrag voort uit culturele waarden, culturele randvoorwaarden en levensstijl. Uit de verzamelde data blijkt nochtans dat de verschillen in winkelgedrag meer gerelateerd zijn aan woonplaats, huishoudentype, leeftijd en dagelijkse werkzaamheden.

Evaluatie van winkelcentrumkenmerken

Het evalueren van winkelcentrumkenmerken vindt plaats als onderdeel van het beslissingsproces dat ten grondslag ligt aan winkelgedrag. Culturele verschillen in deze evaluatie kunnen verklaard worden door verschillen in culturele waarden, de bestaande detailhandelsstructuur in het land van herkomst en door culturele randvoorwaarden. Culturele randvoorwaarden zijn de aangeleerde gewoonten die worden gedeeld door een culturele groep. Het belang van service bijvoorbeeld is meer gerelateerd aan culturele waarden, terwijl openingstijden een kenmerk zijn van de bestaande detailhandelsstructuur. De voorkeur voor assortiment en brand mix in een bepaalde cultuur kunnen te maken hebben met culturele randvoorwaarden met betrekking tot eetgewoonten en kledingstijl, terwijl de behoefte aan parkeervoorzieningen samenhangt met gewoonten met betrekking tot mobiliteit. Volgens de data analyse spelen culturele randvoorwaarden ook een rol in de evaluatie van winkelcentrumkenmerken. De nadruk die Japanners leggen op parkeervoorzieningen lijkt bijvoorbeeld gerelateerd aan hun sporadische gebruik van de auto om te winkelen, oftewel culturele randvoorwaarden met betrekking tot transport. De positieve beoordeling van openingstijden en oriëntatie in Stadshart door de Britten lijkt te maken te hebben met de overeenkomsten tussen de Nederlandse en Britse detailhandelsstructuur. De vergelijkbare beoordelingen van het Stadshart versterken echter het idee dat expats een universeel referentiekader hebben vanwege hun levensstijl.

Verbanden

Daarnaast blijken de drie variabelen (culturele waarden, winkelgedrag en evaluatie van winkelcentrumkenmerken) met elkaar verband te houden. Met betrekking tot de relatie tussen culturele waarden en winkelgedrag blijkt dat zeer frequente shoppers eerder een efficiënte houding hebben ten opzichte van winkelen. Afhankelijk van de bezoekfrequentie verschilt de mate van belang van openingstijden en mode- en trendgevoeligheid. Daarnaast wordt service, sfeer, en persoonlijke ruimte en privacy negatiever beoordeeld naarmate de bezoekfrequentie toeneemt. Wanneer winkelen wordt ervaren als een hedonistische activiteit worden parkeren, horeca en andere voorzieningen en diensten belangrijker. De waardering van sfeer, ontwerp van het centrum en overdekt winkelen zijn ook gerelateerd aan deze houding. Een functionele houding ten opzichte van winkelen correspondeert met het belang van openingstijden, ruimtelijke kenmerken en de waardering van fundamentele kenmerken zoals locatie en toegankelijkheid, parkeren en retail mix.

MOSAIC huishoudprofielen

Vanuit het oogpunt van segmentatie naar levensstijl blijkt dat er onder expats globaal vier MOSAIC huishoudprofielen kunnen worden onderscheiden, namelijk de Vrije Geesten, de Ontwikkelde Stedelingen, de Succesvolle Families en de Welgestelden. Deze groepen variëren allen wat betreft levensfase (van student tot empty nesters) en beslisstijlen (van impulsief koopgedrag tot informatie-gebaseerde koopbeslissingen met een voorkeur voor persoonlijk contact). Aan de ene kant vormen expatriates dus een homogene group, terwijl aan de andere kant de subgroepen totaal verschillend zijn. Tussen de huishoudprofielen bestaan verschillen met betrekking tot het belang van parkeervoorzieningen, voorzieningen en diensten, en mode- en trendgevoeligheid.

Conclusie

Figuur 2 geeft de winkelcentrumkenmerken weer die kunnen worden toegespitst op het winkelgedrag van expats. Zoals de literatuur aangaf kunnen aanpassingen plaatsvinden op drie niveaus, namelijk die van het winkelcentrum, de winkel en het assortiment. Kenmerken die van belang zijn voor de positionering ten opzichte van expats zijn locatie en toegankelijkheid, retail mix, openingstijden, sfeer en overdekt winkelen.

- Locatie en toegankelijkheid
- Retail mix
  - Brand mix (internationaal)
  - Diversiteit aan winkels
  - Assortiment (stijl, mode, kledingmaten)
- Openingstijden
- Sfeer
- Overdekt winkelen
- Service
- Ontwerp v/h centrum en openbare ruimte
- Parkeervoorzieningen
- Sanitaire voorzieningen
- Horecavoorzieningen
- Voorzieningen/Aanbod voor kinderen
- Leisurevoorzieningen
- Taal van informatie
- Bewegwijzering
- Promoties en evenementen

FIGUUR 2 – OVERZICHT VAN WINKELCENTRUMKENMERKEN AANPASBAAR AAN EXPATRIATES

Voor Stadshart Amstelveen bestaan er mogelijkheden om kenmerken aan te passen vanwege de uitbreidings- en herontwikkelingskansen in de nabije toekomst (zie figuur 3). De voornaamste aspecten die in aanmerking komen zijn retail mix, openingstijden, service, mode- en trendgevoeligheid, horeca, sanitaire voorzieningen en het parkeertarief. De locatie en toegankelijkheid, het overdekte winkelen en de weekmarkten zijn positieve punten die behouden moeten worden.

- Uitbreiden van de openingstijden in het weekend en 's avonds
- Verlagen van het parkeertarief
- Extra sanitaire voorzieningen
- Moeder- en kindvriendelijke attitude
- Adverteren in het Engels
- Retail mix en mode- en trendgevoeligheid
- Grotere variatie in het horeca-aanbod
- Service door personeel
- Expatwinkel of tweede supermarkt
- Leisure voorzieningen
- Wellness voorzieningen
- Assortiment
- Aanbod van services

FIGUUR 3 – OVERZICHT VAN MOGELIJKHEDEN MET BETREKKING TOT STADSHART AMSTELVEEN

Al met al blijkt dat zowel levensstijl als etniciteit een rol spelen in het beslissingsproces rondom winkelen. De culturele verschillen in winkelgedrag en de beoordeling van winkelcentrumkenmerken lijken vooral voort te komen uit waarden en culturele randvoorwaarden, alhoewel sommige (zoals bezoekfrequentie) meer afhankelijk zijn van woonplaats, huishoudentype, leeftijd en werkzaamheden, ofwel levensstijl. Bepaalde aspecten gerelateerd aan levensstijl zijn echter ook tot op zekere hoogte gerelateerd aan cultuur. Japanse expats bijvoorbeeld prefereren Amstelveen en Buitenveldert als woonplaats boven het centrum van Amsterdam vanwege de aanwezigheid van speciale scholen en winkels en vanwege de nabijheid van andere Japanners. Voor Amerikanen en Britten, die minder waarden hechten aan de scholing van hun kinderen en aan 'de groep', zijn dergelijke zaken niet per se leidend in hun locatiekeuze. Ook het grote aantal huisvrouwen onder Japanse expats en de tijd die zij hebben om te winkelen kan worden toegeschreven aan culturele randvoorwaarden met betrekking tot dagelijkse werkzaamheden en rolverdeling. In het algemeen wijzen de resultaten erop dat expats een universeel profiel of levensstijl hebben, maar onderschrijven ze ook het belang van een marketingstrategie gericht op culturele verschillen.

De onderzoeksresultaten zijn relevant voor ontwikkelaars en beheerders van winkelcentra en winkeliers in gebieden met veel expats, maar ook in gebieden met (specifieke) groepen immigranten en vanuit het perspectief van winkeltoerisme. In al deze gevallen is het cruciaal om inzicht te hebben in de culturele dimensie van de markt en in interessante etnische niches, zowel wat betreft etniciteit als levensstijl. De resultaten duiden erop dat cultureel onderscheidende doelgroepen onderzocht dient te worden in termen van culturele waarden, culturele randvoorwaarden, winkelgedrag, en wat betreft de perceptie van fundamentele, functionele, identiteit- en ruimtegerelateerde winkelcentrumkenmerken.

JAPAN FESTIVAL AT STADSHART AMSTELVEEN (SOURCE: FLICKR.COM)

PREFACE

With proud I present the result of my graduation research project I conducted as part of my master studies in Real Estate Management & Development within the faculty of Architecture Building & Planning at Eindhoven University of Technology.

The subject, shopping behaviour of American, British and Japanese expatriates in the vicinity of Amstelveen and Amsterdam, appeared to be a fascinating one with a great number of facets balancing between different fields of studies. The opportunity I got, to do this study under the supervision of two companies, Unibail-Rodamco and Strabo, turned out to be a valuable experience as well. The process of researching lead to interesting solutions and activities, such as having the questionnaire translated into Japanese and buddying up with the expat community by taking part in an expat women's network club, guarding at a Japanese kindergarten and making friends in front of a supermarket during survey distribution. As a final act, I plan to visit Japan this October to experience some of the culture I studied myself.

However, this research would not have been possible without the help and support of a great number of individuals, companies and institutions. First of all I am grateful for the data, knowledge, time and resources that the companies of Strabo, Unibail-Rodamco and Experian made available. Secondly, I would specifically like to thank Ingrid Janssen, Astrid Kemperman, Jeroen Verwaaijen, Maria Aguado Cabrera, Carlijn Aarts, Simon van Tongeren, Aya Ezawa, Emi Yamamoto, and Hendrik-Jaap in 't Veld, and of course all the people that filled out the questionnaire. Last but not least, a great amount of thanks goes out to all the people close to me for their support and inspiration.

Please enjoy reading!

Geri Wijnen
2 September 2010

TRILINGUAL SIGNING AT STADSHART AMSTELVEEN (SOURCE: UNIBAIL-RODAMCO)

1. INTRODUCTION

1.1. Background and relevance

1.1.1 Consumer research and market segmentation

Retail has been a booming segment within the real estate sector for several years and the number of investments in shopping centres has increased explosively in the last decade. During the current financial crisis retail is perceived by some as a safe haven, as it is historically offering the most stable and relatively high profit rates (van Enk, 2009; IPD, 2009; Langbroek, 2009). The profitability of retail though is strongly related with the spending behaviour of consumers. Therefore insight in consumer shopping behaviour is extremely important.

Consumer behaviour is however highly dynamic. Currently there is a notion of a 'new' consumer, that is acting unexpected as he is not consuming according to a rigid and traditional pattern, and wants to 'experience' and 'live to the max' as far as possible (Keizer, 2009). On the other hand globalisation and the levelling of consumer's incomes world-wide, causes consumers to develop more homogeneous needs, tastes and lifestyles (de Mooij & Hofstede, 2002). An example is the notion of the 'global teenager' that holds similar values and ideas due to concepts like MTV, internet, MSN, Facebook and enhanced possibilities to travel. But globalisation might also lead to a greater heterogeneity of consumers, since it opens doors for consumers to belong to and identify themselves with several cultural groups at the same time. These developments ask for an increased awareness of what the consumer wants. Companies describing themselves as 'consumer-oriented' are an often heard statement. But there is a possibility to reach more and new market potential when parties truly focus on consumer preferences. The central position of the consumer enhances the importance of marketing. Segmentation of the market into different types of consumers, different lifestyle groups and niche markets, and branding of shopping centres in order to reach a specific consumer group is currently seen as the key to success for realising shopping centres (Keizer, 2009). It demands a marketing strategy that takes the heterogeneity of consumers into account.

1.1.2 Cultural values

Basically, there are four approaches for consumer segmentation (Kahle, 2000; de Mooij, 2004; Dennis, 2005):

- geographical segmentation: based on country, region or town;
- demographic segmentation: based on gender, age, ethnicity, household structure, life stage, disposable income or socio-economic status, occupation and location;
- psychographic segmentation: based on values, beliefs, aspirations and lifestyles, or importance motivation;
- behavioural segmentation: based on product usership, shopping occasion, attitudes, loyalty, shopper spending and other consumer behaviour.

The psychographic approach has become more popular the last few years because of its applicability for marketing purposes and the possibilities to reach a more refined and accurate insight in consumer profiles. The central concepts in psychographic segmentation are values, which are determined by someone's personality and culture. Culture is determined by the society in which an individual is raised and educated, and influences ones behaviour (Hofstede, 2001). Culture is evidently also related to constructs such as ethnicity and nationality.

Several international retailers have recognized the importance of the influence of culture on consumer behaviour, hence the credo 'think global, act local'. Although shopping centres in different countries show an increasingly similar distribution of brands, shops and formulas, holding a local sensitivity seems to be crucial. Companies like Ford, Coca-Cola, C&A, Wal-Mart and IKEA have all learned, sometimes through trial and error, that adaptation of their product or marketing strategy to the local culture and taking into account local consumer preferences is necessary in order to be successful (see figure 1.1 for examples).

Apart from international manufacturers and retailers, segmentation based on culture can also be valuable for shopping centre developers and operators. In the USA some examples exist of whole shopping centres that target a specific ethnic market, like the centres developed by the Legaspi Group that completely focus on the Hispanic community and the Mitsuwa Marketplace chain that targets Japanese consumers on several locations in

Ford - Car manufacturer Ford suffered from declining profits instead of increased efficiency in the mid-90s because of lacking competitivity as a result of centralizing their management and losing touch with the local market (de Mooij & Hofstede, 2002).

C&A - In 1997 clothing retailer C&A decided to standardize their merchandise, which led to considerable losses and the eventual closing of all their stores in the UK and Ireland, because the taste of British and Irish consumers differed from the European continental taste and sales declined (de Mooij & Hofstede, 2002).

Coca-Cola - In 2000 Coca-Cola was one of the first companies to realise the importance of a local strategy. They decided to shift from standardization to local sensitivity by a more customized marketing that opened doors for introducing new brands and products at a local level (de Mooij & Hofstede, 2002).

Wal-Mart - Around 5 years ago low-price supermarket giant Wal-Mart had to retreat from Germany and South-Korea due to a lack of awareness of the local consumer's needs in terms of products, fashion trends, quality, variety, and service. Still they are having a hard time in Japan for similar reasons (Halepete, Seshadri Iyer & Park, 2009; Holstein, 2007).

IKEA - Currently, IKEA has customized their world-wide standardized concept in terms of product range, display store layout, marketing in order to survive and be successful in the Chinese market ("China teaches IKEA", 2009).

FIGURE 1.1 – EXAMPLES ILLUSTRATING THE IMPORTANCE OF A MARKETING STRATEGY ADAPTED TO LOCAL CULTURE

the USA. The Japan Centre in London does a similar thing. Other examples of so-called 'ethnic shopping malls' are the South DeKalb Mall in Atlanta that targets the Afro-American market and the Asian-themed Diamond Jamboree mall in Irvine (see chapter 3 and Annex 4).

Segmentation based on ethnicity hasn't developed like this in the Netherlands, because of the country's limited size and population, and the dense retail structure, which makes it hard to implement concepts that target such niche markets. Moreover Dutch society is not as segregated as the American ("Segregation and shopping", 2009). Consequently 'ethnic malls' would probably be unacceptable in the Netherlands[1]. On a smaller scale though, 'ethnic retailing' also occurs in the Netherlands but not in shopping malls that are specially built for that purpose. Such retail tends to concentrate in shopping streets in multicultural neighbourhoods with high numbers of immigrants. A few exceptions to this are the 'Shoperade' on Osdorpplein, the 'Shopperhal' in the Amsterdamse Poort in Amsterdam, shopping centre 'De Bazar' in The Hague and shopping centre 'Overkapel' in Utrecht. They offer specific products and services for ethnic consumers (e.g. foods, apparel, hairdresser, etc.)[2]. Another well-known example is the 'Beverwijkse Bazaar', which was started in 1980 as a low threshold market place for all kinds of products, and developed into the first large-scale retail concentration of ethnic products and stores in the Netherlands. An example of ethnic retailing on product level is the anticipation to ethnic holidays by certain stores. Since a few years C&A includes classical party apparel for children in their merchandise during the islamic Sugar Festival, and HEMA sells special tableware and candy during that period. An interesting example of adaptation to ethnic clients outside of the shopping centre business is Holland Casino in Breda that has taken the laws of Feng Shui into account in their interior design in order to not affront their Asian visitors. These examples illustrate that market segmentation based on culture or ethnicity can be profitable and commercially interesting.

In the academic world ethnic retailing is a topic as well. The influence of culture on consumer behaviour and shopping behaviour in particular has been studied extensively world-wide[3], but there is still much left to study. In a recent study on Israeli consumers Gilboa (2009) emphasizes that further comparative studies are needed to understand how cultural context influences mall visitors' behaviour. Michon and Chebat (2004) indicate that ethnic diversity can not be ignored by mall managers, but that very little research is available on this topic. In the

[1] The term 'ethnicity' is often perceived in a negative way, bringing to mind associations with ethnic exclusion, discrimination, and coming up in discussions around immigrants and crime. The term 'multicultural' is rather used instead: building for ethnic minorities is thus called 'multicultural building'.

[2] Besides catering to an ethnic market, those types of shopping venues are often created in order to stimulate entrepreneurship among immigrants, which means that retailers pay a lower rent and contracts are short-term. Therefore not only the rules of commerce apply.

[3] Among others: Antonides & van Raaij, 1998; Brunsø & Grunert, 1998; Chebat & Morin, 2007; Kahle, 2000; Michon & Chebat, 2004; de Mooij, 2004; Hofstede, 2001; Nicholl et al., 2000; Seock, 2009; Shim & Eastlick, 1998; Swinyard, 1998.

Netherlands some 'ethno-marketing' consumer research has been conducted, such as the mapping of values and lifestyles of non-Western immigrants in the EtnoMentality model by Motivaction (2006). Studies on the influence of culture on shopping behaviour in the Dutch context are very limited though. With several groups of ethnic minorities in the country however, research results might lead to interesting insights for retailers, retail developers, operators, and marketers. Specifically, the ethnic population increasingly wishes to maintain a link with their heritage and holds a strong ethnic identification (Kraft, 2005). A question remains whether and to what extent one should cater to ethnic minorities or if they should conform to the dominant culture. The market often crudely decides on such issues, but these topics remain very relevant in societies world-wide that cope with similar situations of a growing ethnic diversity. Research on this topic is for example also relevant from the viewpoint of the tourism business.

1.1.3 Shopping centre attributes

The translation from market segmentation strategies based on culture or ethnicity to the shopping centre environment is made by practice, but this (and especially the implications of cultural elements herein) has not yet been researched extensively. Exceptions are a study by Shim and Eastlick (1998) in which they investigated the influence of ethnicity on personal values related to attitudes towards shopping centre attributes and shopping behaviour, and a field study by Chebat and Morrin (2007) in which they explored the effects of warm versus cool color mall décors on shopper perceptions among French-Canadians and Anglo-Canadians, and found that French-Canadians have a higher perception of product quality when the mall exhibited a warm color décor, while Anglo-Canadians had this when the mall exhibited a cool color décor. A Dutch example of a somewhat resembling study is the one by Van de Klundert (2009) who investigated the preferences of ethnic retailers towards the shopping environment. He didn't find any differences with the preferences of local retailers however. Nonetheless do Shim and Eastlick (1998) point out that there is a need for additional research on shopping behaviour and shopping centre attributes and the relation with ethnicity and ethnic identification. The question of how to maintain or bring back the culturally distinguishable elements of shopping venues and retail structures that can be identified in most societies historically stands at the origin of this. The International Council of Shopping Centers also stresses the importance of retaining this local sense of place in shopping centres, and therefore the necessity of understanding the cultural context of developments (ICSC, 2009). Michon and Chebat (2004) also emphasize that in general marketing scholars should give more attention to the mall environment, since it is part of the metawrapping of products and services.

1.2. Scope

The relevance of research on the influence of culture on shopping behaviour and shopping centre attributes became clear in the previous paragraph. Another practical relevance for this study follows from a question posed by market research specialist Strabo and commercial real estate operator, investor and developer Unibail-Rodamco. These companies want to gain insight in the shopping behaviour of expatriates that live in the catchment area of shopping centre 'Stadshart Amstelveen'. Is Unibail-Rodamco currently missing expats and what can be done to attract them while respecting and not jeopardising the Dutch clients? The shopping behaviour of expatriates in Amsterdam and Amstelveen therefore forms the scope of this study.

1.2.1 Expatriates

Expatriate are persons who have moved outside their country-of-origin to work with an (international) company that is accommodated abroad, as well as entrepreneurs with their own company abroad, and abroad residing partners and children of the groups mentioned above (based on Amsterdam Municipality, 2007). Expats form a relatively new and cosmopolitan consumer segment of which limited market information is available (Caldwell, Blackwell & Tuloch, 2006). Apart from being highly educated their income is usually higher than average (the average British expat salary was 43% higher than the average UK income in 2007) and they often receive extra benefits (Just Landed, n.d.). For expats in the Netherlands 30% of the employment income is tax-free up to 10 years. They also often receive an extra contribution for accommodation, costs of moving abroad, children's education, a car, language course, medical costs, or even for housekeeping and security (Gemeente Amstelveen, 2008). All these benefits together result in an above average disposable income and make expats an interesting target group. Students could be perceived as expatriates as well, but because their disposable income is generally relatively low they are not considered as true expats in this study.

1.2.2 Stadshart Amstelveen

Stadshart Amstelveen (see chapter 4 for an extensive description) is located in the heart of Amstelveen just north of the A9 highway and in between two main north-south routes that lead into Amsterdam (see figure 1.2). Stadshart Amstelveen consists out of 78.200 m2 gross leasable area (GLA), with a total of 212 units of which Unibail-Rodamco controls 139, equalling 62% of the GLA. The main anchors are the Albert Heijn, Bijenkorf, C&A, HEMA, H&M, iCentre/Apple, V&D and ZARA.

The catchment area of Stadshart Amstelveen also contains a considerable population of expatriates because of its location close to the country's prime business district 'Zuidas' and Schiphol Airport with a great number of multinational offices, and the Free University of Amsterdam (VU) that attracts foreign employees. The area also offers an agreeable residential environment and several international schools in the neighbourhood. According to a 2007 estimation by the Amsterdam municipality based on data from the Immigration and Naturalisation Office (IND), Centre for Work and Income (CWI), and several municipal registration departments, between 50.000 and 100.000 expats are hosted in the Amsterdam region[4] (Amsterdam Municipality, 2007), of which approximately 7.000 in Amstelveen (Amstelveen Municipality, 2009).

FIGURE 1.2 – ACCESSIBILITY STADSHART AMSTELVEEN

Stadshart Amstelveen does not cater specifically to expats (except through trilingual signage and by the presence of a sushi shop and Japanese restaurant), in contrast with the shopping centres Gelderlandplein (Buitenveldert) and Kostverlorenhof (Amstelveen) where specific shops and services for expats can be found. Therefore Unibail-Rodamco is interested in market data on this considerable potentially affluent target group with which they are still unfamiliar and that they might not optimally attract. Market research specialist Strabo that regularly cooperates with Unibail-Rodamco is also interested in this type of information.

1.2.3 Ethnicities

With 2.350 people the Japanese form the largest expat community in the primary catchment area of Stadshart Amstelveen[5], and also the largest Japanese community in Europe after Düsseldorf. Another 600 Japanese live in

[4] The region of Amsterdam (Stadsregio) includes the municipalities of Amsterdam, Aalsmeer, Amstelveen, Beemster, Diemen, Edam-Volendam, Haarlemmermeer, Landsmeer, Oostzaan, Ouder-Amstel, Purmerend, Uithoorn, Waterland, Wormerland, Zaanstad and Zeevang.

[5] The catchment area equals the area within 30 minutes driving-time of Stadshart Amstelveen. The primary catchment area includes all area within 10 minutes driving time of Stadshart Amstelveen, the secondary catchment area the area within 10 and 20 minutes driving time and the tertiary catchment area the area between 20 and 30 minutes driving time.

the rest of Amsterdam. The British are by far the largest group of foreigners accommodated in Amsterdam and Amstelveen: in total more than 11.000 people. Around 12% of them live in the primary catchment area of Stadshart Amstelveen. The Americans form the third largest group in Amsterdam and Amstelveen with over 6.000 people, of which 760 are accommodated in the primary catchment area. Besides, Amstelveen faced an explosive increase of the number of Indians since 2006, now being the second largest group in the primary catchment area with around 1.500 inhabitants. Other cultures that are well represented in Amstelveen are the Germans with 880 people and the South-Korean, Chinese and Taiwanese with a total of 950 inhabitants (Gemeente Amstelveen and Gemeente Amsterdam, 01-01-2010). Remarkable is that the 'traditional' immigrant countries as Turkey, Morocco, Surinam and the Antilles are not in the top-15 of nationalities in Amstelveen, which is unusual for a Dutch city.

In this thesis the shopping behaviour of Japanese, British and American expatriates will be compared. There are several reasons for this choice. First of all those cultures are clearly distinguishable and well represented in the catchment area. Second the Japanese, British and American communities are also quite settled in the region of Amsterdam and Amstelveen for several years, and therefore easy to reach through schools and organisations. Although the Indian culture is also clearly distinguishable, the community is not that long established yet and is therefore harder to reach. In addition, literature is readily available on the Japanese, British and American culture. India has gone through a process of economic development much later, which means that less information is available on cross-cultural consumer behaviour. Hence, the research will focus on Japanese, British and American expats that live in Amstelveen and Amsterdam.

1.3. Research questions

1.3.1 Objectives

The following research objectives were derived from above description of background, relevance and scope:

- Gain insight in the shopping behaviour of Japanese, British and American expatriates in the catchment area of Stadshart Amstelveen;
- Gain insight in the influence of culture on the shopping behaviour of Japanese, British and American expatriates;
- Give recommendations on how shopping centre attributes can be adapted to the shopping behaviour of expatriates;
- Give recommendations on how Unibail-Rodamco can attract expatriates in the catchment area of Stadshart Amstelveen to this shopping centre by adapting shopping centre attributes.

1.3.2 Research questions and conceptual model

From the objectives two research questions are derived; one theoretical and one practical research question. From the research questions that investigate the relation between the variables culture, shopping behaviour and attributes, a conceptual model has been derived, which is shown in figure 1.3. Based on the research questions and the conceptual model six sub-questions have been formulated. In those questions Japanese, British and American expatriates are perceived as 'target groups'.

Culture is defined as 'the values, attitudes, beliefs, artefacts and other meaningful symbols that help people interpret, evaluate and communicate as members of society' (Rice, 1993). Just as Hofstede (2001) did, values are in this case regarded as the most important manifestations of culture, and defined as 'stable beliefs regarding desired behaviour or end states' (Antonides & van Raaij, 1998). By assuming an indirect relation between the three concepts the model follows the hierarchical value-attitude-behaviour system according to Kahle (2000), as well as the individual decision making process that Oppewal (1995) describes. Kahle argues that the influence of values on behaviour flows from abstract value to mid-range attitudes and to specific behaviours, and that values have only an indirect effect on consumer behaviour through domain-specific attitudes. Oppewal (1995) describes the consumer decision making process by a model of individual choice behaviour that starts with the perception of (a set of) attributes, followed by the evaluation of each attribute and the overall evaluation of all attributes, after which the decision is made. Accordingly, shopping behaviour is regarded as 'the outcome of an individual's decision-making process based on the evaluation of shopping centre attributes under the influence of values and attitudes'.

Theoretical research question

How can shopping centre attributes be adapted to culture-related shopping behaviour of American, British and Japanese expatriates?

Practical research question

What can Unibail-Rodamco do in terms of shopping centre attributes to attract expatriates to shopping centre Stadshart Amstelveen?

Sub-questions

1. What are the cultural values of the target groups?
2. What is the shopping behaviour of the target groups?
3. What is the relation between cultural values on the shopping behaviour of the target groups?
4. How do the target groups evaluate shopping centre attributes?
5. What is the relation between cultural values and the evaluation of shopping centre attributes by the target groups?
6. What is the relation between the evaluation of shopping centre attributes and the shopping behaviour of the target groups?

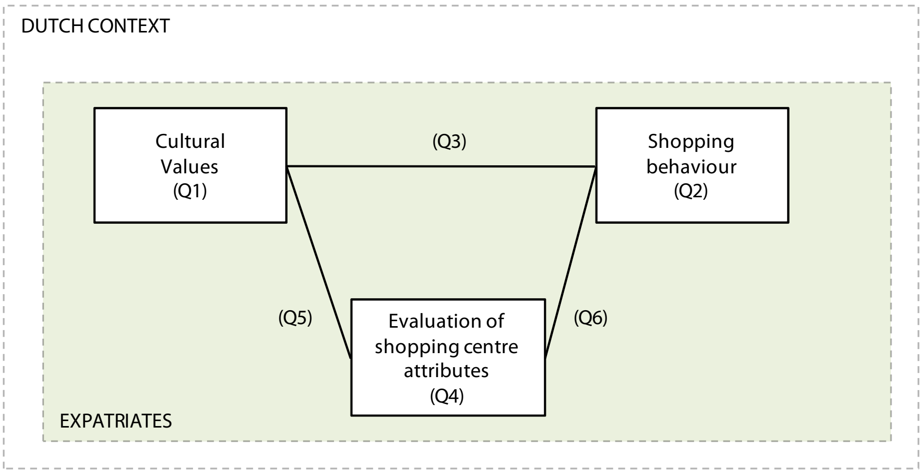


FIGURE 1.3 – CONCEPTUAL MODEL

As indicated before, the scope of the research is limited to Japanese, British and American expatriates in the Dutch context, in specific those that live in the catchment area of shopping centre Stadshart Amstelveen. The cultural values, evaluation of shopping centre attributes and shopping behaviour of the Japanese, American and British expatriates will be compared to determine the influence of ethnicity. Ethnicity classifies individuals into cultural or national groups (Craig & Douglas, 1997). Apart from ethnicity also lifestyle might play a role for expatriates. All over the world they share the common ground of working abroad, being well educated and having a high income, and they probably share a somewhat similar attitude in life as well. To obtain a more balanced insight in the influence of ethnicity and lifestyle on the shopping behaviour of expatriates, an analysis is made of the Dutch context as well, incorporating a general review of Dutch consumers regarding cultural values, shopping behaviour and shopping centre attributes.

1.4. Research design

The research is an exploratory and cross-sectional study with a strong ethnographic character, that took place between November 2009 and September 2010. The research structure is displayed in figure 1.4. During the initial phase of the study (from November to March) a literature review was conducted on cultural values, shopping behaviour and the relevant shopping centre attributes for the target groups and for Dutch consumers. Also interviews were held with expats from the target groups to obtain general information on their attitude towards shopping in the Netherlands. Chapter 2 explores the direct relation between cultural values and shopping behaviour, answering research question 1, 2 and 3. Chapter 3 focuses on the role of the evaluation of shopping centre attributes in that relation, and discussing research questions 4, 5 and 6. In both chapters the influence of ethnicity and the lifestyle of expats are discussed as well. Also, a comparison with Dutch consumers is made.

During the second part of the research (from April to June) quantitative data was collected with a questionnaire amongst expatriates within the catchment area of Stadshart Amstelveen. The data collection is discussed in chapter 4. The results of the initial phase were used as input for the design of this questionnaire. Topics that were included are psychographic consumer characteristics like cultural values, the attitude of consumers towards shopping, the choice of shopping locations in the area, the shopping pattern of consumers, the importance of shopping centre attributes, and satisfaction with these attributes in Stadshart Amstelveen. Chapter 5 presents the collected data, the data analysis, and the comparison with existing data from Strabo to gain insight in the Dutch context. Data on household profiles from Experian was used to provide insight in the aspect of lifestyle. The third phase of the study (from July to September) comprehended the interpretation of the results and the formulation of conclusions and recommendations, which is covered in chapter 6.

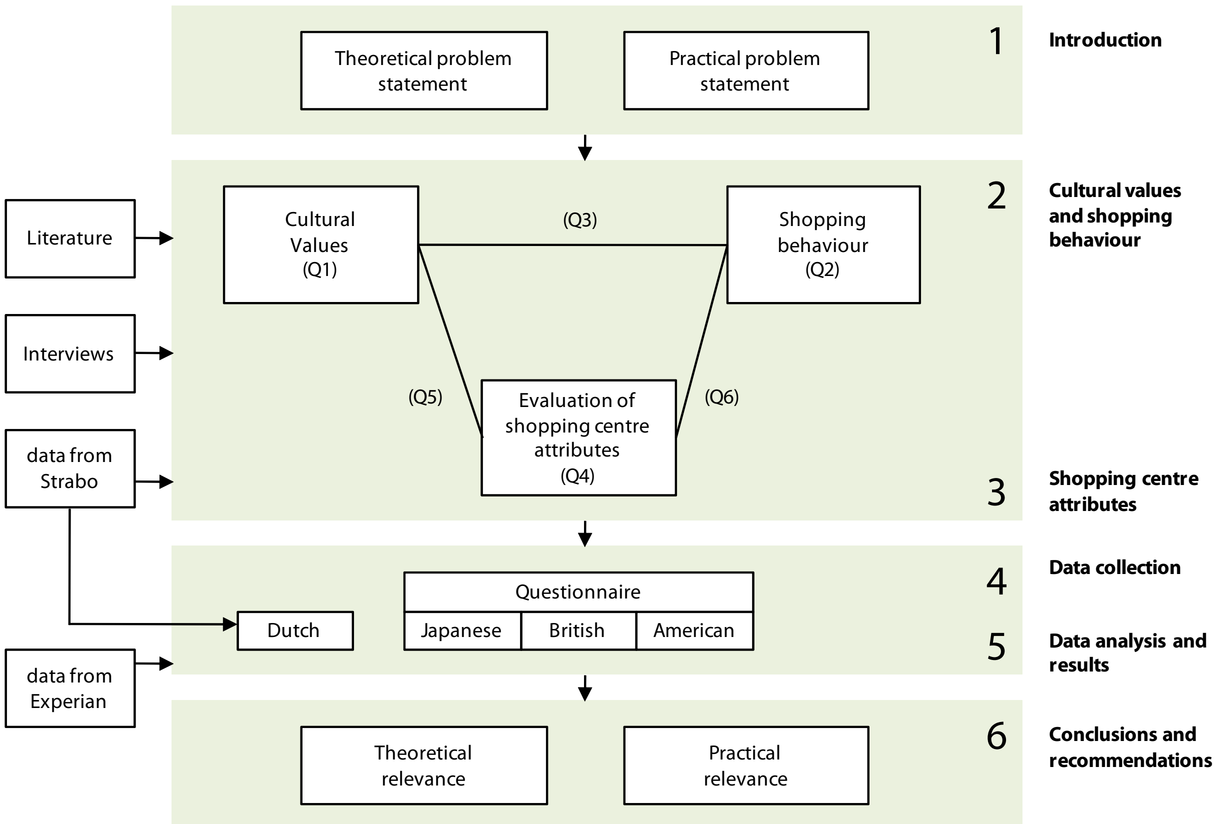


FIGURE 1.4 – RESEARCH STRUCTURE

SHIBUYA, TOKYO - JAPAN: GIRLS SHOPPING FOR 'LUCKY BAGS' ON NEW YEAR'S DAY (SOURCE: FLICKR.COM)

2. CULTURE AND SHOPPING BEHAVIOUR

2.1. Introduction

This chapter will initially focus on the direct relation between cultural values and shopping behaviour, as is shown in figure 2.1. The next chapter will further explore the role of the shopping centre attributes in this decision process. The research questions that will be answered in this chapter are as follows:

Research question 1:	What are the cultural values of the target groups?
Research question 2:	What is the shopping behaviour of the target groups?
Research question 3:	What is the relation between cultural values on the shopping behaviour of the target groups?

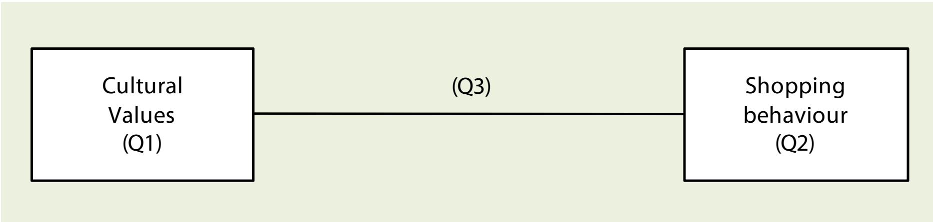


FIGURE 2.1 – DIRECT RELATION BETWEEN CULTURAL VALUES AND SHOPPING BEHAVIOUR

The answer to the first research question provides a background for understanding the differences in shopping behaviour of Japanese, British and American expats and Dutch consumers from a cultural perspective. An extensive description of the concept of cultural values will be given to clarify the (methodological) difficulties that are intertwined with cross-cultural research. Subsequently a cross-cultural comparison of Japanese, British, American and Dutch cultural values is provided based on a literature review. For research question 2 the concept of shopping behaviour will be explored in order to understand the process of decision making during shopping and the factors that influence that process. Secondly the shopping behaviour of Japanese, British and American expats is studied and compared to that of Dutch consumers through a literature review and in-depth interviews with expatriates and some experts on expat affairs. The chapter is concluded with an overview of the possible ways in which culture influences shopping behaviour (research question 3).

2.2. Cultural values

Before answering research question 1 and comparing the cultural values of Japanese, British, American and Dutch consumers it is important to know what is understood by cultural values (§ 2.2.1 and 2.2.2). Subsequently, in paragraph 2.2.3 a cross-cultural comparison of the cultural values of Japanese, British, American and Dutch consumers will be given.

2.2.1 Definition of cultural values

In this study the focus is on measuring the influence of culture on shopping behaviour. However, the concept of culture cannot be quantified directly. Therefore the concept of cultural values is used, which exists of the elements 'culture' and 'values'. Both of these will be discussed in the next paragraph. Over the years numerous attempts have been undertaken to describe the concept of culture. Some leading researchers and journal articles provide a background and framework for cross-cultural consumer studies (Hofstede, 2001; Luna & Gupta, 2001; de Mooij, 2004; Craig & Douglas; 2006). The most common used definitions of culture in these studies are presented in figure 2.2 with the name of the original author. McCracken defines culture from the perspective of the individual, and is therefore not useful in comparing cultures. The definition by Geertz makes the concept of culture understandable, but his definition is more metaphorical. Tylor offers a very detailed definition by specifically naming art and law as manifestations of culture. Hofstede's definition is more descriptive but does not include any specific or noticeable elements of culture.

Tylor (1881)	Culture is that complex whole which include knowledge, belief, art, morals, law, custom and any other capabilities and habit acquired by man as a member of society.
Geertz (1973)	Cultures are a set of control mechanisms (plans, recipes, rules, instructions) for the governing of behaviour.
McCracken (1986)	Culture is the lens through which the individual views phenomena; the blue-print of human activity.
Hofstede (1991)	Culture is the collective mental programming of the people in an environment. Culture is a characteristic of a group, not of an individual, where the members are conditioned by the same education and life experience.
Rice (1993)	Culture is the values, attitudes, beliefs, artefacts and other meaningful symbols that help people interpret, evaluate and communicate as members of society.

FIGURE 2.2 – DEFINITIONS OF CULTURE BY VARIOUS AUTHORS

In this study culture is seen as a phenomenon that encompasses the individual level and is a common feature of groups through which they can be described, and that affects the behaviour of individual group members. From that point of view the definition by Rice fits the best because his definition names both the tangible and intangible aspects of culture, and he relates those to elements of decision making such as interpretation, evaluation and communication which result in behaviour. Culture is thus defined as: "the values, attitudes, beliefs, artefacts and other meaningful symbols that help people interpret, evaluate and communicate as members of society".

Rice indicates values as one of the elements of culture. According to Hofstede values are the most important manifestation of cultures. Values are so important in cross-cultural research because of their measurability. Values can be determined through research techniques as interviewing and observation, which allows to describe the concept of culture in measurable terms and compare one culture to another. Since culture exists independently of the individual and is intertwined with historical context, values are more or less stable over the course of time (de Mooij, 1998; Hofstede, 2001), and hence form a relatively solid base for comparison. Rokeach described the term value in 1973 as "an enduring belief that one mode of conduct or end-state of existence is preferred over to an opposing mode of conduct or end-state of existence" (de Mooij, 2004). A simplified definition by Antonides and van Raaij (1998, p.40) will be used in this study: "Values are stable beliefs regarding desired behaviour or end states".

Several theories and methods have been developed to measure values: Rokeach (1973; in de Mooij, 2004) and Kahle (1986; in Kahle, 2000) came up with a list of universal values, Schwartz (1994; in de Mooij, 2004) introduced value domains and Hofstede (1980; in Hofstede, 2001) developed a system of dimensions along which dominant value systems could be ordered.

A number of consumer research studies have used Hofstede's model, because it is rather easy to interpret and has a limited number of dimensions. However, he did not develop a system of values but of cultural dimensions. Unclear is also if his data isn't obsolete, because it was collected over 40 years ago. Schwartz's model is more recent and holds a greater potential to explain cultural differences since it introduces two extra dimensions that Hofstede doesn't cover, namely hierarchy versus egalitarism, and harmony (Ng, 2006). On the other hand Schwartz's model is still rather immature, since it has been applied in limited number of countries, shows some inconsistencies and overlaps between dimensions, and is harder to interpret (de Mooij, 2004). The third possible instrument is the List of Values (LOV) by Kahle (2000). The list is in fact a simplified version of the list that Rokeach introduced with his widely accepted value theory in 1973; the LOV covers five of the seven domains that Rokeach determined. It is a nine item list of general values in people's lifes. The nine items are: sense of belonging, excitement, fun and enjoyment of life, warm relationships with others, self-fulfilment, being well-respected, sense of accomplishment, security, and self-respect. The LOV has been used and tested for reliability and validity in several fields and countries in Europe, South-America, Asia and the US (Kahle, 2000). However, limitations of the LOV are that it is rather abstract, which is preferably avoided in cross-cultural studies, and the fact that there are some issues with linguistic and conceptual equivalence (de Mooij, 2004).

As becomes clear, all methods have their advantage and disadvantages. Unfortunately, there is a fundamental and paradoxical problem in trying to compare cultures, since the distinctive context-related elements that define a culture are exactly those elements that make them impossible to compare. As Brunso and Grunert (1998, p. 149) state: "every culture will have idiosyncratic cognitive categories and dimensions; this is the core concept of culture itself. Therefore, the more cross-culturally valid a survey instrument is, the more aspects idiosyncratic to the culture will be left out". The dilemma of cross-cultural research is therefore in the concept of culture itself. Moreover, the main value theories have all been developed in a Western context, which creates another cultural bias that researchers have not been able to overcome. Consequently, the question what instrument to use to measure culture and cultural values has not been answered by academics so-far, and depends on the type of research to be conducted, the level of validity strived for, the depth and understanding of the studied cultures and the available resources like time and money.

In that respect the List Of Values by Kahle offers the best prospects. Even though some issues of linguistic and conceptual equivalence of the LOV have arisen with regard to the values of self-respect, sense of belonging, and self-fulfilment (Rose and Shoham, 2000; Schwartz, in: de Mooij, 2004), the great advantage of the LOV over other values lists is that it is very well applicable in marketing research. Several authors point out the advantages such as ease of use, the limited administration and high reliability (e.g., Antonides & van Raaij, 1998; Shim & Eastlick, 1998; de Mooij, 2004). Furthermore, the LOV has been successfully used before in a shopping centre context. An example is the study by Swinyard (1998), who studied the relation between personal values using the LOV and mall visit frequency, and another study by Shim and Eastlick (1998), who have investigated the influence of culture on personal values (LOV) related to attitude towards shopping centre attributes and shopping behaviour. For these reasons and because of the limited time and money available, the List of Values will be used in this study as the instrument to measure cultural values. Further methodological issues will be discussed in chapter 4.

2.2.2. Cross-cultural comparison of cultural values

To gain an initial insight in the cultural values of the cultures subject to research and their differences, they are presented in table 2.1 and figure 2.3 using the five cultural dimensions by Hofstede (2001). Based on a large-scale worldwide study among IBM employees in the 1960s Hofstede calculated average values for 50 countries and three regions from all over the world. He ranked and scored these countries on five scales from 1 to 100: power distance (PDI), uncertainty avoidance (UAI), individualism versus collectivism (IDV), masculinity versus femininity (MAS), and long versus short term orientation (LTO). A short description of each of the dimensions can be found in Annex 1.

A first observation is that the USA and UK show rather similar scores on all dimensions. The USA, UK and the Netherlands are comparable on individualism, where they all rank top 5. These three cultures also score very alike on power distance. Japan scores rather high on power distance, which can be explained through the historically determined national status of the religion, the status of the political leader, and the importance of respect, that likely encouraged the acceptance of authority (de Mooij, 1998). The USA and UK rank relatively low on long-term orientation and uncertainty avoidance, while Japan ranks relatively high on these dimensions. The strong uncertainty avoidance of the Japanese is a result of their strict behavioural codes and rigid societal structure (Sood

TABLE 2.1 – HOFSTEDE'S COUNTRY INDEX SCORES* (derived from Hofstede, 2001)

Index scores	Power Distance (PDI)	Uncertainty Avoidance (UAI)	Individualism / Collectivism (IDV) (high/low)	Masculinity / Femininity (MAS) (high/low)	Long-/Short-term Orientation (LTO) (high/low)
USA	40	46	91	62	29
UK	35	35	89	66	25
Japan	**54**	**92**	**46**	**95**	**80**
Netherlands	38	53	80	**14**	44

** Scales run from 0 to 100*

In bold: the most extreme cases

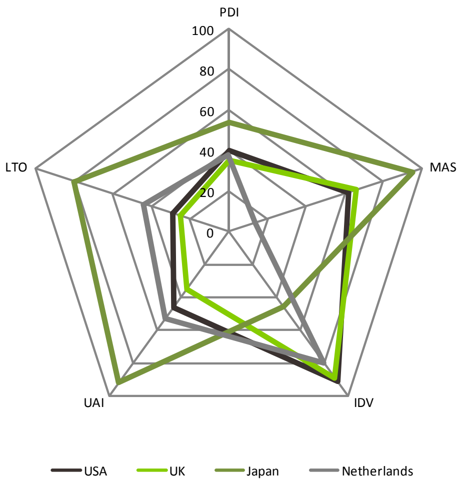


FIGURE 2.3 – HOFSTEDE'S COUNTRY INDEX SCORES (derived from Hofstede, 2001)

& Nasu, 1995). The Netherlands takes a more or less average position here. Quite remarkable is the distribution of scores on the masculinity / femininity index: Japan ranks first on masculinity whereas the Netherlands ranks almost last on this scale, only leaving Norway and Sweden behind. In terms of consumer behaviour people in a highly masculine culture consume for show, while they consume for use in a feminine culture.

An extended description of differences in cultural values between US, Japan and the Netherlands is given by de Mooij (1998) in Annex 2. She takes Hofstede's dimensions as a starting point, but underlines the importance of some other unique elements of societies, being the orientation on context, nature and time (de Mooij, 2004; Ng, 2006). In these respects we can place the US, UK and the Netherlands as Western countries in contrast with Japan as an Asian country. Asian countries are characterised by high-context communication, the importance of harmony and human interaction, whereas Western countries embody direct low-context communication, a focus on planning and the idea that man exists to conquer nature. Then there is also the construct of independent and interdependent self-concept. This is an expression of the cultural dimension of individualism versus collectivism on an individual level. People in individualist countries hold a greater independent self-concept, while people in collectivist countries hold a greater interdependent self-concept (de Mooij, 2004).

A difference in value focus also follows from a study by Rose and Shoham (2000), who investigated the difference in value orientation for US and Japanese mothers of children between 3 and 8. Using the List of Values they found that American mothers value self-respect, warm relationships with others, and security as most important, while Japanese mothers value fun and enjoyment in life, security, accomplishment and self-fulfillment as most important values. Other theoretical cross-cultural comparisons of values of the Japanese, US, UK and Dutch society are unfortunately not available. Several (practical) studies have been carried out for one or more of these countries though, indicating that they are clearly distinct from each other. For example Experian has developed separate frameworks per country for their MOSAIC system that compares consumers using demographical, geographical, psychographic and behavioural data (including attitudes, values, product usage, brand and media preferences). Something similar holds for the Values and Lifestyles program (VALS), which is based on Rokeach's Values System and identifies several value types according to personal motivations and demographic characteristics. Different models have been created though for US and Japanese consumers , in which the personal motivations for US consumers are: ideals, achievement and self-expression, and for the Japanese: tradition, achievement and self-expression.

It is also interesting to review models that were developed for one specific country. For example the model on Dutch values developed by Oppenhuisen and Sikkel (2001). The model covers six dimensions: affiliation versus achievement, social versus individual, old values versus new values, security versus challenge, family life versus freedom, and conformist versus going alone. In the chosen scales the dimensions of Hofstede can be recognized, but for instance the dimension of 'family life versus freedom' resembles the contrast between individualism and femininity as core values. Something similar can be done for two models by the Japanese researchers Ushikubo and Dentsu, respectively. Central in one model is the interplay of 'inner- and outer-directed focus' versus 'order and chaos'. In the other model it is the relation between 'achieving' and 'group-merit' versus 'being membership dependent' and 'being non-conformist' that is central (de Mooij, 2004). The chosen scales point towards the importance of uncertainty avoidance and the dilemma between individualism and collectivism in Japan.

All in all, both the afore mentioned theoretical and practical models and comparisons clearly indicate the value differences between the four counties. The results of the questionnaire will provide further insight in the cultural values of Japanese, British and American expatriates.

2.3. Influence of cultural values on shopping behaviour

After determining cultural values, the shopping behaviour of Japanese, British, American and Dutch consumers from the region of Amstelveen and Amsterdam will be explored in order to answer research question 2. Subsequent to the definition of shopping behaviour (§ 2.3.1) a cross-cultural comparison of shopping behaviour will be given (§ 2.3.2). This comparison is based on both literature and interviews with expatriates and some experts on expat affairs. The outcomes are directly linked to the influence of culture, in order to answer research question 3. Firstly, general literature on the influence of culture on consumer and shopping behaviour is reviewed. Secondly, a shift is made towards the cultures and target groups subject to research, and the influence of ethnicity, cultural constraints and lifestyle.

2.3.1. Definition of shopping behaviour

Basically, two definitions of shopping behaviour can be distinguished that both apply in this research. The first is based on theories of decision-making or the process of shopping itself, while the second is based on a classification of customer motivation or the reason for making a shopping trip. Those definitions are in fact interrelated: the decision-making process depends partially on the shopping motivation. Both definitions and the way they are related and relevant in this study will be discussed in this paragraph.

Shopping behaviour is in fact a form of consumer behaviour that follows the main stages of the consumption cycle. Very straightforward it is the process of selection and purchasing of products, services, ideas, or experiences to satisfy needs and desires (de Mooij, 2004; Antonides & van Raaij, 1998). Another way of defining shopping beha-viour is through the five-stage buyer decision process, existing of need recognition, information search, evaluation of alternatives, the decision itself, and post-purchase behaviour. Accordingly, Oppewal (1995) describes shopping behaviour as the outcome of a decision making process (see figure 2.4). He presents a model of individual choice behaviour that starts with the perception of (a set of) attributes, followed by the evaluation of each attribute and the overall evaluation of all attributes, after which the decision is made. This process is repeated for all alternative shopping locations, and leads to the generation of a preference structure of shopping centres based on their utility. The assumption is that the alternative with the highest utility is chosen. Oppewal's model is partially based on the model by Timmermans (1982; in Kemperman, 2000) in which the stages of decision-making are described in a comparable way, but that comprehends the influence of an individual's value system, motivation, information level, and personal objectives and characteristics.

Furthermore, when defining shopping behaviour it becomes clear that there are different types of shopping behaviour with a distinguishable character and pattern. Those different types can be classified according to function and motivation. A very important and basic distinction is that between shopping to make a specific purchase and recreational shopping or browsing. In 1986, Bloch, Sherell and Ridway noted that shopping surpasses merely functional utility and task orientation; it depends on the shopper's value and attitude towards the shopping environment. Shopping values can be operationalised in two dimensions:utilitarian and hedonic shopping values. Utilitarian values are related to task orientation, while hedonic values reflect personal gratification and self-expression found in the shopping experience itself (Babin & Attaway, 2000; Michon & Chebat, 2004). Several studies have been conducted on the relation between shopping values, shopping behaviour and the shopping environment. For example Babin and Attaway (2000) examined the influence of environmental affect on shop-

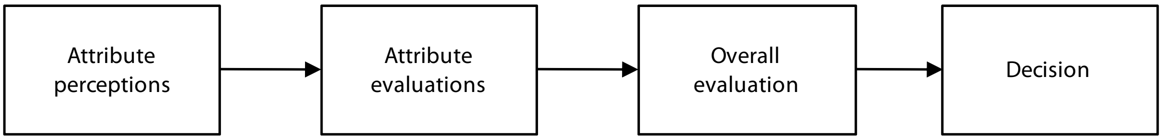


FIGURE 2.4 – CONCEPTUAL MODEL OF INDIVIDUAL CHOICE BEHAVIOUR BY OPPEWAL (from Oppewal, 1995)

ping values and acquiring customer share, and Stoel, Wichliffe and Lee (2002) investigated the relation between shopping values, purchase behaviour and satisfaction with shopping centre attributes. Recently Seo and Lee (2008) developed an extended classification of shopping values. In a study on perceived shopping value for different types of fashion they found five major shopping value constructs that applied to different retail formats (department stores, discount stores as well as internet malls) and were related with social class. Those were efficiency, experiential, diversional, reliable, and self-expressive shopping value. Efficiency shopping value resembles the utilitarian shopping dimension and is related to the perception of time. The other four constructs are associated with the hedonic shopping dimension: experiential shopping value is related to having interest in the shopping experience itself, diversional shopping value to feelings of escaping from problems of everyday life, reliable shopping value to the perception of product and store reliability, and self-expressive shopping to self-consciousness and identification with the shopping environment.

All aspects considered it becomes clear that depending on the viewpoint there are two definitions for shopping behaviour, and that both are relevant in this study. The decision-making process behind shopping is of interest because it covers the evaluation of shopping centre attributes. The motivation of shopping is related to a person's values and attitudes. However, it appears that the concepts of values, attitudes and the evaluation of shopping centre attributes are closely related. As indicated Kahle (2000) distinguished the value-attitude-behaviour hierarchy. He argued that the influence of values on behaviour flows from abstract values to mid-range attitudes and to specific behaviours, and that values have only an indirect effect on consumer behaviour through domain-specific attitudes. This is very similar to the distinction of value types that Vinson, Scott and Lamont made in 1977 (in: Shim & Eastlick, 1998). They distinguished (1) global values, (2) domain-specific values, and (3) evaluations of product attributes. Domain-specific values are in fact a kind of attitudes: an organization of several beliefs around a specific object or situation (de Mooij, 2004) or a type of values specific for one context. In a context of shopping those domain-specific values are the previously discussed utilitarian and hedonic shopping values, and evaluation of product attributes resemble the evaluations of shopping centre attributes. Hence, shopping behaviour is defined in this research as 'the outcome of an individual's decision-making process based on the evaluation of shopping centre attributes under the influence of values and attitudes'.

In addition, a distinction is made between daily and non-daily shopping. The distinction between daily and non-daily shopping is in fact closely linked to the difference between utilitarian and hedonic shopping values. Daily shopping is defined as shopping for food and personal care products; non-daily shopping includes shopping for all other products (mainly apparel, books, media and home wares). Daily shopping is mostly done to make a specific purchase. Non-daily shopping is more recreational and often carried out as a leisure activity.

2.3.2. Cross-cultural comparison of shopping behaviour

The shopping behaviour of expats and the relation of culture on shopping behaviour cannot be reviewed separately. In this section the role of ethnicity, cultural constraints and lifestyle on shopping behaviour is discussed by providing an overview of the literature that compares shopping behaviour cross-culturally and in the Japanese, British and American culture in specific, followed by the outcomes of interviews with expatriates.

Influence of culture on shopping behaviour

The influence of culture on consumer behaviour and shopping behaviour has been studied extensively worldwide. Differences between cultures have been found for various types of shopping behaviour, for several aspects of behaviour and in different settings. De Mooij (2004) for example has conducted some very interesting research in this area; she correlated the cultural dimensions by Hofstede with the consumption of certain products, such as food and beverages, household products, clothing, electronics, car, leisure activities, complaining behaviour, brand loyalty, media behaviour and the response to marketing communications. Among others, she refers to a study by Kacen and Lee (2002), in which the relation between impulse buying behaviour, cultures with an individualistic and a collectivistic focus, and an independent or interdependent self-concept was studied. The differences that were found appeared to depent on the importance of self-identity in the specific culture, and societal norms such as the accepted level of showing emotions and achievement of instant gratification. In this regard de Mooij (2004) also found a correlation between low uncertainty avoidance and agreement with the statement "I often buy products on impulse". Zhang and Mittal (2008) claim a relation with a low power distance as well.

In one particular study the influence of culture on shopping values and shopping behaviour has been researched. Michon and Chebat (2004) found that French-Canadian mall shoppers exhibit more hedonistic shopping values than Anglo-Canadians, and point towards the implications this can have for mall operators. Nicholl (2000) also focused on shopping behaviour and motivations in shopping malls, while comparing US and Chilean consumers. He found that US shoppers tend to have multiple motivations, and assess atmosphere as an important trigger to visit a mall. They also tend to spend more time there. Chileans on the other hand have more utilitarian motives. Chileans will also search for information before the mall visit, while US shoppers rely on information available at the mall itself. De Mooij (2004) explains this by a different score on the individualism-collectivism scale. Ackerman and Tellis (2001) found differences in shopping behaviour between Chinese and American customers of supermarkets in the USA. Chinese customers examined more products per item purchased, took more time to make the purchase, and used other senses more extensively such as touch, smell, taste and occasional sound tests. On the whole can be concluded that there is a great amount of aspects of shopping behaviour that are influenced by culture and cultural values.

Influence of ethnicity on shopping behaviour

In 1995 Sood and Nasu explored the effect of religiosity on consumer behaviour in Japan and the United States. They found that Americans were considerably more price conscious and focused on buying products on sale than the Japanese, who were more concerned with buying domestic-made products and stores that offer appropriate service. How true are these findings today? Since 1995 the shopping behaviour of both Japanese and US consumers has changed drastically due to globalisation, economic and technological developments, and other societal changes. Nevertheless do these observations still apply to a large extent. This is because of the underlying cultural values. This point will be explained by taking the influence of cultural values on shopping behaviour in Japan as an example.

In the collectivist culture of Japan staying in harmony with the group is important, and it makes the Japanese very self-conscious. This turns shopping into a kind of self-discovery that is a liberating, adventurous and fun experience that offers the possibility to fine-tune one's image (Clammer, 1992). Clammer also found that the cultural values of the Japanese are reflected in the importance of beauty of functional design, functionalism, high quality, brand name, service, personnel, packaging and gift wrapping, and the notion that new is good which leads to a high frequency of discarding products. Those constructs clearly point in the direction of the value of harmony with nature and certain characteristics of a masculine and high uncertainty avoiding culture. The high power distance of the society is reflected in the obligatory gift-giving culture to social superiors.

The consumer behaviour in Japan is changing though. Larke and Causton (2005) outlined that Japanese consumers are still rather quality, style and brand conscious but that price has become more important in the last decade, whereas quality and convenience is getting less emphasis, and the choice of store became at least as important as the choice of product or brand. The consumers are also becoming more value-for-money and trend driven (WGSN, April 2009; "The new Japanese consumer", 2010). Those changes in shopping behaviour imply some value shifts, but the cultural dimensions of uncertainty avoidance and collectivism can still be recognized. The economic weakness of the last few decades for example causes the greater focus on price but is the result of increased anxiety, and part of the reason for the popularity of online buying is that it allows to shop anonymously without the necessity of being self-conscious ("The new Japanese consumer", 2010).

For US, UK or Dutch culture such a description cannot be given due to a lack of information. However, some current developments in consumer behaviour in the UK, US and the Netherlands, such as the increasing heterogenic consumer needs, and the focus on experience and identity, obviously point towards a high individualist society and focus on self-expression.

Influence of cultural constraints on shopping behaviour

To gain deeper knowledge on the specific shopping behaviour of Japanese, British and American expats in the region of Amstelveen and Amsterdam several in-depth interviews were conducted with expats and some experts on expat affairs. The results of these interviews and the followed procedure will be considered in more detail in chapter 3. In this paragraph the outcomes of the interviews that concerned cultural aspects relevant for shopping behaviour are discussed. Those cultural aspects are referred to as cultural constraints. Cultural constraints are "learned conventions that are shared by a cultural group" (Norman, 1988). Those are often deeply rooted in society and can have a considerable impact on the general behaviour of consumers. Table 2.2 presents an overview of some apparent cultural constraints that follow from the outcomes of the interviews with expatriates and experts on expat affairs and findings from literature.

In addition, all respondents noticed alterations in their shopping pattern and even shopping motivations after they moved to the Netherlands. The most important reason for this modified shopping pattern are opening hours and an decreased car mobility. The British and American respondents mentioned to shop more often here for daily products, but less often for non-daily products and as a leisure activity. The Japanese respondents also noticed to shop less here for leisure. Two Japanese respondents who lived in the USA previously both indicate that in Japan and the USA they used to shop more often as a leisure activity. This changed shopping pattern can affect

TABLE 2.2 – CULTURAL CONSTRAINTS (by author)

Theme	Cultural contstraint
Housing	- Japan and the Netherlands: High population density, so people have relatively small homes with little storage space. - USA and UK: In general larger homes, so a greater amount of storage space.
Mobility	- Japan: A lot of people don't have car and primarily travel by public transport, thereby limiting the amount of products they can take home. - Netherlands: A lot of people travel mainly by car and bicycle. - USA: It is standard to have a car. Therefore people are able to shop in large amounts, and to limit the frequency of their daily shopping. For UK the situation is somewhat similar.
Cuisine	- Japan: Cuisine is based on fresh and easily perishable foods like fish. - USA, UK and the Netherlands: Meat plays a more important role in the consumption pattern. In USA and UK there is a greater tradition of specific and larger cuts of meat.
Beauty ideal	- Japan: Fair skin is the ideal. - USA, UK and the Netherlands: Tanned skin is the ideal.
Fashion style	- Clothing style can be more or less fashionable or traditional across countries.
Cleaning standard	- Japan: Clothes are washed cold not to harm the fabric. - Western cultures: Washing with cold water is considered insufficient to clean well.
Gift-giving	- Japan: An important tradition of (obligatory) gift giving on certain occasions exists. What counts is the motive, product, presentation, packaging and price of the gift and where it is bought. - Netherlands: Saint Nicholas is a typical gift-giving holiday. - US and UK: Christmas is the most important gift-giving holiday.
Role pattern	- Japan: women are usually in control of the household budget and the financial decisions, and (still) most women stop working after their marriage. This makes them rather flexible in terms of time and money. - USA, UK and the Netherlands: Working women are common.

other aspects of shopping behaviour as well. As one Japanese respondent who previously lived in the USA indicated "*I have become more cautious about quality and less about price, since I have less opportunity to shop here*".

Influence of lifestyle on shopping behaviour

For expats also their lifestyle may play a role in their shopping behaviour. Unfortunately there is little known about this subject. Therefore this paragraph provides a short overview of consumer behaviour data that is available on expats. First of all the preferences of expats differ with their household structure. In a study on the residential preferences of expats in the Randstad was found that single expats prefer to live in a city because of the presence of shops, bars, restaurant, entertainment and sporting facilities, while cultural facilities are less important. Expat families prefer a quiet and spacious suburban area to live that is close to an international school and good shopping facilities (Regioplan Beleidsonderzoek, 2005).

There are also differences in preferences among expats from different nationalities. Asians prefer to live together, which is the reason for the concentration of Japanese in Amstelveen and Taiwanese in Capelle aan de IJssel. They are also more often on a tighter budget. Expats from the United States and United Kingdom prefer a mix of cultures and lifestyles and opt for more spacious and luxurious accommodation. What expats generally appreciate in the Netherlands are the working hours, transport possibilities and the education and childcare provided (HSBC, 2009). Expats in Amstelveen value the accessibility, public transport and public space. They miss restaurants, cafes and clubs, and childcare facilities, as well as shops with longer opening hours at night and in the weekend, and cultural facilities (Gemeente Amstelveen, 2008).

Thirdly there is a difference between expats with a Dutch partner and the ones that are here on a temporary basis. Expats without a Dutch partner are more often temporarily here and take less effort to integrate into society. On the other hand also expats with a Dutch partner can feel the need to stay in touch with their own culture, as a means of not losing their identity.

2.4. Conclusion

In this chapter the concepts of culture and shopping behaviour and their interrelation were explored. It appeared that, although some methodological limitations regarding the existing models, cultures can be compared in terms of values. Shopping behaviour appeared to be a dual concept that is the outcome of an individual's decision-making process based on the evaluation of shopping centre attributes on the one hand, but is under the influence of values and attitudes on the other hand. The common notion here are values, both general values and shopping values. To measure general values the List Of Values will be applied in this study. The value-attitude-behaviour hierarchy that underlies these findings forms the basis for further research.

A comparison of American, British, Japanese and Dutch consumers showed that these groups clearly differ with regard to values and shopping behaviour. Especially the Japanese culture seems to differ from the others because of their collectivist viewpoint and the importance of uncertainty avoidance. The other three groups are more alike because of their shared Western background. Shopping behaviour seems to differ between cultures as a result of cultural values, cultural constraints and lifestyle. From the literature review and interviews follows that shopping behaviour can differ across cultures in terms of for example information collection, product examination, shopping pattern, impulse buying, shopping for gifts and other motivations. The closely linked classifications of utilitarian versus hedonic shopping values and daily versus non-daily shopping that were pointed out to be at the fundament of shopping behaviour will be taken as a starting point for further research and data collection to make a comparison between cultures possible.

In the next chapter the focus will be on the evaluation of shopping centre attributes. The influence of culture on the evaluation of shopping centre attributes will be discussed, as well the relation between the evaluation of shopping centre attributes and the shopping behaviour of Japanese, British and American expats.

PLAZA MEXICO, LYNWOOD - CALIFORNIA: AN 'ETHNIC MALL' TARGETING THE HISPANIC MARKET (SOURCE: FLICKR.COM)

3. SHOPPING CENTRE ATTRIBUTES

3.1. Introduction

In the previous chapter the relation between cultural values and shopping behaviour has been explored. In this chapter we will focus on the role of shopping centre attributes in this relation. The goal of this chapter is to provide insight in the relation between the evaluation of shopping centre attributes and shopping behaviour on the one hand, and the relation between cultural values and the evaluation of shopping centre attributes on the other hand as is displayed in figure 3.1. The following research questions will be answered in this chapter:

Research question 4:	How do the target groups evaluate shopping centre attributes?
Research question 5:	What is the relation between cultural values and the evaluation of shopping centre attributes by the target groups?
Research question 6:	What is the relation between the evaluation of shopping centre attributes and the shopping behaviour of the target groups?

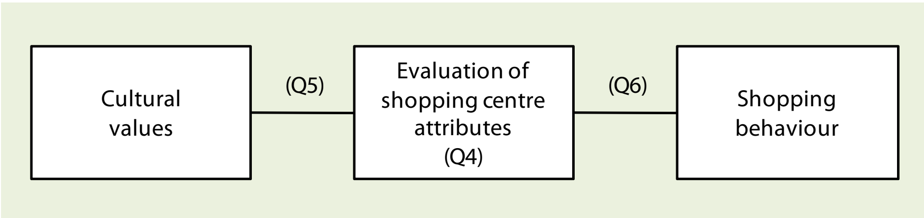


FIGURE 3.1 – INDIRECT RELATION BETWEEN CULTURAL VALUES AND SHOPPING BEHAVIOUR

In order to gain insight in which shopping centre attributes are important when it comes to targeting expatriates, firstly it is interesting to know what shopping centre attributes influence shopping behaviour in general. Therefore several commonly used classifications of shopping centre attributes are discussed in paragraph 3.2. Subsequently, in paragraph 3.3 the influence of culture on the evaluation of shopping centre attributes will be determined (research question 5) by analysing which shopping centre attributes are culturally distinct. In that respect, first a general literature review on the influence of culture on shopping centre attributes is presented. Second, some practical examples of 'ethnic retailing' are analysed, followed by an exploration of the retail structures of the US, UK, Japan and the Netherlands. In addition, the outcomes of in-depth interviews with expatriates and experts on expat affairs are presented. With the latter also an initial insight is given into the evaluation of shopping centre attributes by the target groups (research question 4). The chapter is concluded with a list of shopping centre attributes that are expected to be evaluated differently across cultures, and to play a role in the shopping behaviour of expats (research question 6).

3.2. Shopping centre attributes

In the previous chapter shopping behaviour was defined as the outcome of an individual's decision-making process based on the evaluation of shopping centre attributes under the influence of values and attitudes. This decision-making process is described by Oppewal (1995), who states that previous to a decision an evaluation of attributes takes place for every possible alternative. The alternatives are the different shopping venues an individual can choose between. In the next paragraph the shopping centre attributes that are critical in the decision process of where to shop are discussed in order to answer research question 5.

Several authors have made an effort to distinguish all the relevant attributes. An overview of that is presented in Annex 3. In an attempt to describe the shopping centre marketing mix Oppewal (1995) distinguishes three categories of attributes for shopping areas, namely (1) location convenience and accessibility, (2) selection of stores, and (3) appearance, layout and furnishings, to which he appoints a great number of attributes. Verbunt (2005) compared several academic studies and came to a rather similar classification of shopping centre attributes in terms of (1) location related, (2) functional and (3) spatial-physical performance. In comparison to Oppewal she adds a fourth area of performance, namely marketing. A very extensive classification with 38 attributes has been used by Dennis (2005) covering most of Oppewal's attributes and further adding to that. Also the attributes used by Strabo in the four previously conducted studies on Stadshart Amstelveen for Unibail-Rodamco have been reviewed. The categories of attributes that can be determined from this comparison are shown in figure 3.2.

• Accessibility or location	• Other facilities and services
• Parking facilities	• Atmosphere
• Retail mix	• Architecture/design of public space
- Quantity	• Climate or physical comfort
- Quality	• Accessibility of entrances
- Choice	• Cleanliness
- Pricing	• Social safety
- Product assortment	• Personal space and privacy
• Opening hours	• Orientation and way-finding
• Catering facilities	• Service
• Leisure facilities	• Marketing activities

FIGURE 3.2 – OVERVIEW OF KEY SHOPPING CENTRE ATTRIBUTES

3.3. Relation between culture and shopping centre attributes

The next step is to gain insight in how expats evaluate shopping centre attributes (research question 4) and which shopping centre attributes are culture-related (research question 6) and in. This is achieved by presenting a literature review on the evaluation of shopping enter attributes across cultures (§ 3.3.1), on 'ethnic retailing' in practice (§ 3.3.2), on the retail structures of Japan, US, UK and the Netherlands (§ 3.3.3), and by providing an overview of the results from in-depth interviews with expats from the region of Amstelveen and Amsterdam and experts on expat affairs (§ 3.3.4).

3.3.1. Evaluation of shopping centre attributes across cultures

It is apparent that consumers from different cultures have different preferences towards shopping centre attributes. Support for this statement is found in great variety of studies. Hall (1966) for example argues that human perceptions of space are influenced by culture. He describes several cultures in terms of perceptual differences of privacy, personal distance, involvement and boundaries. De Mooij (1998) has studied the differences in advertising across cultures. She explains this through cross-cultural differences in aesthetic experience, colour perception, landscapes and music. Kliment (2004) points out the differences in ethnic preferences with regard to the colours used in stores, the light level and product presentation. He gives as an example that Hispanic Americans have a preference for brighter background colours and a high ambient light level. Chebat and Morrin (2007) found something similar in a field study exploring the effects of warm versus cool color mall décors on shopper perceptions among French-Canadians and Anglo-Canadians. They found that French-Canadians have a higher perception of product quality when the mall exhibited a warm color décor, while Anglo-Canadians had this when the mall exhibited a cool color décor. They suggest that similar observations could probably be done for other types of atmospherics as well. With regard to price criteria Ackerman and Tellis (2001) came to a significant conclusion in a study on the shopping behaviour of consumers with an American and a Chinese background in the USA. They suggested that cultural value differences are an explanation for remarkable price differences between Chinese and American supermarkets, indicating towards how deeply rooted cultural influences might be. Brunso and Grunert (1998) compared the importance of aspects of ways of shopping for food among Danish, British, French and German consumers. They discovered a difference in the importance of product information, attitudes to advertising, enjoyment from shopping, specialty shops, price criteria and shopping lists. Also, in Great-Britain the aspects of enjoyment of shopping and the use of specialty shops receive the lowest ratings of importance, while in the other three countries this is attitude towards advertising. However, all consumer groups indicate price criteria as the most important.

As follows from these examples, the influence of culture on the evaluation of shopping centre attributes has been investigated before, although the specific influence of cultural values has not yet been studied extensively. The only example of such a study known to the author is one by Shim and Eastlick (1998). They have investigated the relation between personal values on the attitude towards shopping centre attributes and shopping behaviour, and the influence of ethnicity hereupon. They found that personal values are related to a favourable attitude towards shopping attributes on the one hand, and that such an attitude had a direct influence on shopping behaviour. Shim and Eastlick conducted their study among US and Hispanics, using the List of Values to measure personal values. The attitude towards shopping centre attributes was measured by asking respondents to indicate importance and satisfaction of a list of attributes on a Likert-type-scale. Shopping behaviour was examined by asking for visit frequency and the time spent at the mall. The attributes that Shim and Eastlick used can also be found in Annex 3. Based on the previous examples can be concluded that a great number of shopping centre attributes are assessed differently across cultures, and that cultural values play a role in this evaluation process.

3.3.2. Ethnic retailing in practice

In order to get a more complete overview of which attributes are culture-dependent, an analysis is made of existing cases of 'ethnic retailing'. Those are (from the USA) the centres developed by the Hispanic Retail Group, the Mitsuwa Marketplace chain, the South DeKalb Mall in Atlanta, the Diamond Jamboree mall in Irvine, the Japan Centre in London and in the Netherlands the 'Shoperade' on Osdorpplein, the 'Shopperhal' in the Amsterdamse Poort in Amsterdam, shopping centres 'De Bazar' in The Hague, and 'Overkapel' in Utrecht (see Annex 4). These examples tell us that there are indeed certain attributes that can be adjusted to cater to consumers with a different cultural background. Basically there are three levels: the shopping centre, the store and the product assortment.

The most important are the attributes related to functional performance. Adjustments can be in retail or brand mix and the right product assortment that often contains a large amount of imported products or brands. Typical product categories are foods, books, CD's, DVD's, clothing, homeware, tableware, cosmetics, health supplements, and gift items. With regard to food, stores can hold a different proportion of fresh, canned and dried foods according to differences in food culture. There might also be greater assortment of meat, fish and patisserie, and in-store departments for on the spot and custom preparation. Another aspect can be the level of ripeness that is preferred for fruits and vegetables.

Also facilities and services can be different. Catering might offer typical ethnic foods and drinks or it can be different in concept (such as a tea bar in an Asian mall). In terms of leisure there can be an enhanced focus on certain target groups or on specific concepts. One example is a greater focus on entertainment for children in malls targeting Hispanics; another one is the presence of a karaoke bar or photo sticker store in an Asian-themed mall. Possible services on offer are DVD-rental, beauty and hair salons, travel service, recruitment service, banking services, dentist, health services, dry cleaning, and a delivery service. Those are all services that require intensive communication or are subject to cultural customs and constraints. Bilingual staff is therefore very important as well as bilingual signage and information provision. From a spatial-physical point of view the atmosphere, design and layout of the centre may be adjusted to match the preferences and lifestyle of a certain culture. The sizes of isles for example might be bigger to cater to cultures that prefer to shop with their whole family.

3.3.3. Retail structure per country

In search of culture-dependent shopping centre attributes, the individual retail structures of countries might reveal distinguishing features as well. These are formed and influenced by all kinds of factors but can, at least partially, be ascribed to local culture (Antonides & van Raaij, 1998). In table 3.1 some attributes are displayed that are typical for Japan, USA and UK and the Netherlands (Kooijman, 1999; Krafft & Mantrala, 2006). The table shows that shopping behaviour is not only dependent on culture in the sense of values, but also on the existing built environment. The existing retail structure originates from all kinds of historically determined factors, such as geography, conventions in building, economy and government and other (cultural) constraints.

The UK and the Netherlands seem to be the most similar in terms of retail structure. From that point of view the evaluations of shopping centre attributes by the British and the Dutch are expected to be the most alike. With regard to car accessibility the situation in the USA and UK seems to be the most similar. The situation in Japan seems to differ the most from the other countries. However, shops have long opening hours in both Japan and the USA. Consumers from those countries are therefore expected to have a comparable attitude towards this feature.

TABLE 3.1 – TYPICAL CHARACTERISTICS OF THE RETAIL STRUCTURE

USA	UK	Japan	Netherlands
Decentralized retail structure	Centralized retail structure	Retail around transportation nodes	Centralized retail structure
Planned suburban malls with anchor stores; in last years focus on Main Streets	Town centre is shopping centre, limited out-of-town retail parks; in last years focus on inner-city redevelopments	All-service department stores, underground and vertical malls and convenience stores	Town centre is shopping centre, open air, few out-of-town retail parks; in last years focus on inner-city redevelopments
Long opening hours, some supermarkets 24h	Limitations on Sunday opening hours, but few	Long opening hours, 365 days a year	Limited opening hours during nights, weekends and holidays
Car accessibility	Car and public transport accessibility	Public transport accessibility	Car, public transport and bicycle accessibility

3.3.4. Interviews

To gain insight in the evaluation of shopping centre attributes of the target groups several in-depths interviews were held with Japanese, British and American expatriates, and with some experts on expatriate affairs. The results of these interviews were analysed to gain insight in the influence of cultural values and the role of ethnicity and lifestyle.

Methodology

The interviews are used to verify some elements of the literature and to receive additional qualitative information on the attitude of expatriates towards shopping that the literature doesn't cover. The interview template that was used can be found in Annex 5. In this case a semi-structured face-to-face interview is a suitable method, since information can be gathered on the attitudes, opinions, feelings, thoughts and knowledge of respondents, and open and more complicated questions can be posed (Baarda & de Goede, 2006). It is also a more personal approach and offers opportunity for interaction, which is especially important in cross-cultural research since there are easily miscommunications and misinterpretations of concepts. Points of attention during the interviews were socially desirable answers and selective memory. These problems were avoided as much as possible by asking respondents to explain their answer and to give clear examples.

A total of 12 expats was interviewed: four Japanese, four American and four British expats, as well as a Japanese sociologist of Japan Studies in Leiden, an expert on Asian expats from the Amstelveen municipality and the owner of a British expat supermarket (see Annex 6). The interviews were held on a location that was convenient for the respondent and where he or she felt at ease. The respondents all lived in Amstelveen, Amsterdam or the surrounding region, and were approached via friends, colleagues, expat associations, and social media (e.g. LinkedIn) using the so-called snow ball technique. Each respondent or contact was asked to provide names of new respondents. This method was used because the expat community is not very easy to locate and reach, and information on ethnicity is not publicly available due to privacy reasons. A disadvantage of this method is that only a selective sample of the population is included in the research, therefore the outcomes only lead to indicative results and not to general conclusions. The results can also not be generalized because all expats are different in age, household structure, income, values, and attitudes which impacts their opinions and experiences and secondly, because a part of the respondents live in Amstelveen while others live in Amsterdam. This might also influence their answers.

Results

From the analysis of the results of the interviews follows a rather interesting image with both differences and similarities between cultures. Despite the small sample, the majority of the remarks of respondents were heard more than once. The items that were mentioned the most as different, remarkable or lacking in the Netherlands as compared to their country of origin, were opening hours and the level of service by personnel. Those topics were named independent of culture. One explanation is that the situation in the Netherlands regarding opening hours and service level is rather different compared to their country-of-origin. On the other hand more common factors related to the lifestyle of expats may play a role here: most of them have a limited amount of free time and might be used to a relatively high level of service due to their income.

Opening hours and days are quite a big inconvenience for expats in general. However, the situation is worse for expats who live in Amstelveen than for those who live in Amsterdam, where shops and various supermarkets are opened every Sunday. The restricted opening hours leave expats with less opportunity to shop, and more planning involved. To them it is odd that shops are closed at night, on Sundays, and during holidays. The same applies to restaurants. In addition some of the expats pity the fact the town centre is dead and dull on Sundays due to the shop closure. The Japanese respondents all named opening hours as the first difference that comes to their mind, while for the UK an US respondents it seems lower on their list. While most expats find the limited opening hours inconvenient, some experience it as a positive thing as this reaction from a British respondent illustrates: "*I truly love the Sunday closure since it forces you to focus on family and friends*".

All respondents agree that the **service level** in shops and restaurants is very low in the Netherlands. How much that bothers them varies though. Some people have accepted the low service level, while others are really annoyed by it. Their attitude also differs with their cultural background. The American and British expats seem to be the most bothered by the service level. According to an American respondent personnel misses a turnover mentality and are characterised by slowness. A British respondent indicated that "*the personnel makes you feel not special, unwanted and not valued as a customer*". Reasons for the lack of service might be a lack of professional training, and in Amsterdam the great number of transient customers. One Japanese respondent on the other hand mentioned to find it convenient not being bothered by an employee immediately after entering the store. Another Japanese mentioned that "*although the level of service is lower here compared to Japan, the sales persons compensate for that by having more knowledge*".

All respondents also named one or more **products from home** that they missed. Those were especially daily products like food and personal care products. For the Japanese it is mainly a matter of difference in food culture, which asks for special rice and a greater variety of fresh foods, dried foods and vegetables. The Japanese respondents all shop at one or more Japanese supermarket for specific Japanese groceries and at the Friday market at Stadshart Amstelveen for seafood products. One of the experts notes that a lot of Japanese visit the Albert Cuyp market for oisters and Kobe-meat. For the British and American respondents the food aspect is less critical, since their food culture is more similar to that of the Dutch. They indicated to shop at expat supermarkets incidentally, and only for certain cooking products like specific cuts of meat and baking products like baking soda and flour and products from specific brands (e.g. cereal, tea, chocolate, and baked beans). However, generally they find the price level in expat shops too high. A lot of British expats solve this problem by stocking for products in summer and at Christmas when visiting their home-country. For personal care products it mainly seems a matter of brand and familiarity. Two British respondents indicated to prefer certain brands of shampoo, hair wax and facial products. The Japanese respondents did not name any of those products, but the Japanese sociology expert indicated that Japanese expats as well might have a preference for certain brands of personal care products because they are recognizable, familiar and understandable. All respondents indicated to ask family and friends to bring certain products when they visit.

Clothing was another product type often named as problematic. Clothing sizes were mentioned to be an issue for expats from all nationalities. For Japanese it is a main issue, since they have serious troubles in finding shirts, trousers, suits and shoes in small sizes. The Japanese respondents solve this problem by buying clothes abroad once or twice a year, for example in Japan, Germany, Italy or France. Moreover, three American and a British expat noted the limited choice in clothing sizes and the high prices of clothing as a topic as well. They solve the problem by buying clothes online or by asking family and friends to buy items at home. One Japanese and one British expat also state to have a hard time finding a less fashionable and more traditional style of clothing in the Netherlands. In this respects the Japanese sociology expert emphasises.

Language and communication is also an important matter. Most of the UK and USA expats explicitly mention to find it very convenient that all store personnel speak English. For Japanese expats this might be an additional reason to visit Japanese expat shops. In any case did one of the Japanese female respondents indicate to visit a Japanese hairdresser because of communication reasons. The British and American expats did not really have this need for special services. One British expat indicated he sometimes had problems with product information, since this is often provided in Dutch, German and French but never in English.

Several **other attributes** were mentioned during the interviews that seemed culture-dependent. All four American respondents and one British respondent named the small (or basic) range of choice in products at the supermarket. Four respondents from all three countries appreciated the great variety of organic and vegetarian products in the supermarket. Two Americans are truly bothered by the limited store size. The two other American respondents name the lack of personal space due to narrow isles in supermarkets, and the short conveyer belt at the checkout. A British and an American respondent name the difference in lay-out of supermarkets that seem illogical and not flowing very well. A British respondent also names the dim lighting in supermarkets. Respondents from all three countries indicated that in general prices are higher here. According to the Americans only the vegetables are cheaper here, while clothing is a lot more expensive. Two British expats notice the number of small specialty (or delicatessen) shops in the Netherlands, which leads to more choice. One British expats appreciates the comprehensive shop mix that can be found at neighbourhood centres. Two Japanese respondents on the other hand mention the limited diversity of shops in the Netherlands, and were surprised that the same shops and chains can be found in every shopping centre. Two Japanese respondents also miss a broader choice in family restaurants and coffee take out stores like Starbucks. Finally one American and one Japanese expat mentioned the trouble of having to take all groceries home by bike or public transport. The American respondent missed her car; the Japanese the delivery services that she was used too.

3.4. Conclusion

In this chapter it has been investigated what shopping centre attributes are related to culture, based on the conclusions from the analysis of ethnic retailing in practice, the analysis of retail in the cultures subject to investigation, the available cross-cultural research on this shopping centre attributes, and the interviews with expatriates and experts in the field of expat affairs. It appears that almost all attributes that were presented in figure 3.1 as key shopping centre attributes in the decision-making process of where to shop hold a cultural element (see figure 3.3). The only attributes that were not mentioned in the literature and during the interviews were accessibility of entrances, social safety and cleanliness. In addition, location was not mentioned specifically either but this is a basic attribute that is of importance for every shopping centre targeting a specific market segment. Three levels on which attributes are adjustable can be recognized: the shopping centre, the store and the product assortment.

Some of the attributes can be explained by differences in cultural values and others by the existing retail structure in the home-country of expats or by cultural constraints as discussed in chapter 2. For example, the importance of service is more related to cultural values, while opening hours are an attribute of the existing retail structure and a result of historical constraints with regard to government regulations. The product assortment and brand mix that is a preferred in a specific culture can have to do with cultural constraints such as cuisine and fashion style, while parking facilities may depend on constraints regarding mobility.

In the next chapters further insight will be gained in how shopping centre attributes can be adapted to match the shopping behaviour of expats in general, and in Stadshart Amstelveen in specific, by the results that are obtained from the survey that was distributed among expats. Chapter 4 discusses the data collection of these results and contains an extensive description of the case of Stadshart Amstelveen.

- Accessibility with different means of transportation
- Parking facilities
- Retail mix
- Variety
- Pricing
- Size of stores
  - Product assortment (choice and quality)
  - Brand mix and fashionability
- Opening hours
- Catering facilities
- Leisure facilities
- Facilities and services related to language
- Atmosphere
- Architecture and 'atmospherics'
- Climate
- Space perception (size of isles and stores)
- Signage and information
- Service level
- Advertising

FIGURE 3.3 – OVERVIEW OF SHOPPING CENTRE ATTRIBUTES ADAPTABLE TO CULTURE

REMBRANDTHOF AT STADSHART AMSTELVEEN (SOURCE: UNIBAIL-RODAMCO

4. DATA COLLECTION

In the previous chapters the concepts of cultural values, shopping behaviour and the evaluation of shopping centre attributes and their interrelation have been explored by reviewing literature and through in-depth interviews with expatriates and experts in the field. This information is the input for the design of a questionnaire that will be used to collect additional information on shopping behaviour among expats in the catchment area of Stadshart Amstelveen. First of all this chapter will introduce the shopping centre of Stadshart Amstelveen in more detail, followed by a discussion of the design of the questionnaire, data collection procedures and description of the sample.

4.1. Stadshart Amstelveen

4.1.1 General description

Shopping centre Stadshart Amstelveen is located in the centre of Amstelveen and has a peripheral location in the greater Amsterdam region. It is situated just north of the A9 highway, connecting the centre with Amsterdam and the rest of the region via the A4, A2 and A10. The east and west borders of the centre are formed by the Beneluxbaan and the Keizer Karelweg-Amstelveenseweg, which both lead into Amsterdam. The centre has a good accessibility by car, public transport and bicycle. The bus station west of the centre provides connections with the rest of the region, while tram 5 and metro 51 on the east side provide a direct connection to the centre of Amsterdam. The shopping centre consists out of 48.755 m2 gross leasable area (GLA) with a total of 153 units. Main anchors are Albert Heijn, Bijenkorf, C&A, HEMA, H&M, iCentre/Apple, V&D and ZARA. Off July 2010 ZARA has taken the place of BCC. Strong local retailers are Ross Mode (female fashion) and Van der Heijden (men's fashion). There are 22 units in gastronomy in the centre including 17 restaurants/cafes, four fast food restaurants and one bar. Unibail-Rodamco owns and controls 139 units in the centre, which equals 62% of the GLA. Co-owners of the centre are AH and Bijenkorf. V&D is owned by Fortis, C&A is owned by Redevco and HEMA is owned by IEF Capital. The retailers on the Rembrandtweg are independent. The total number of parking places is 2.772, of which 1575 are inside of the underground parking leased to Q-park, 150 on street level and the rest at V&D.

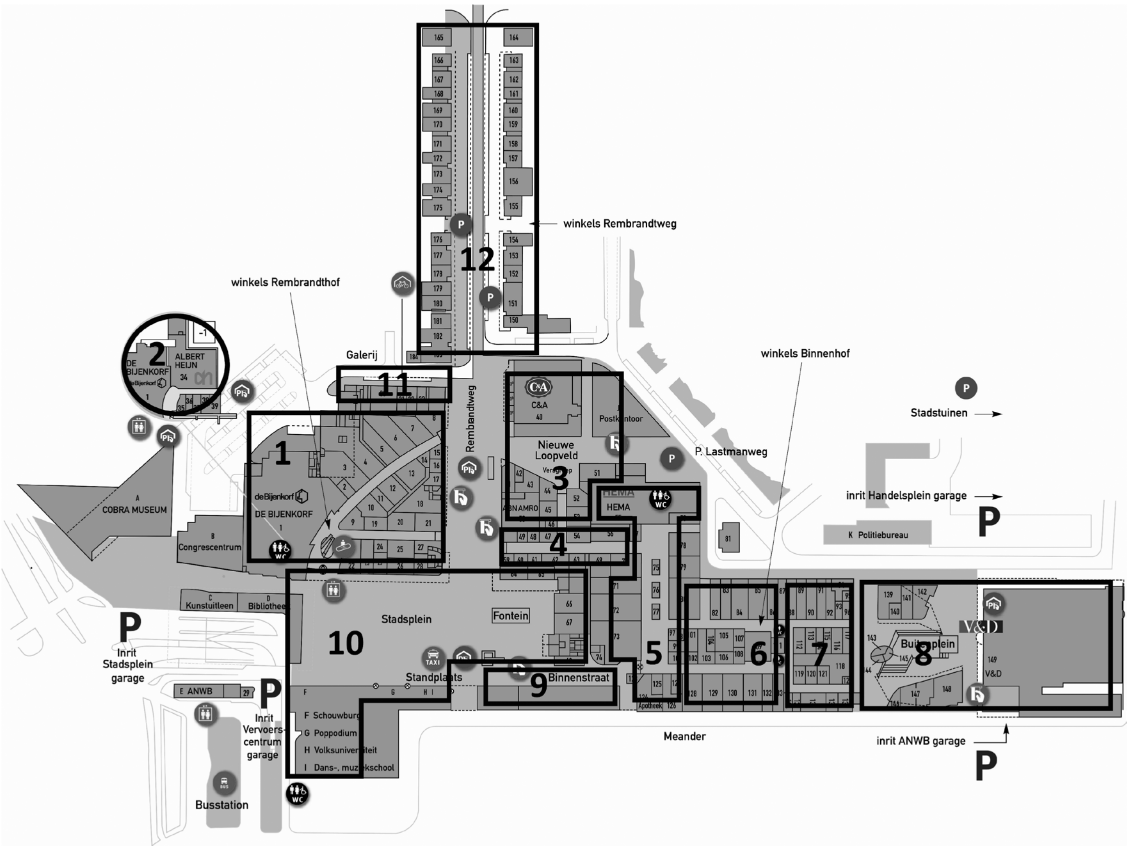
The centre opened in 1960 and originally solely existed of the Binnenhof. It is designed by Van den Broek & Bakema and was one of the first planned shopping centres built in the Netherlands. In the 1980s the centre was enlarged and covered. In 1998 the centre was redeveloped during which the Binnenhof was renovated and the Rembrandthof was added to it. In 2009 the centre has had an extensive 'facelift', during which the entrances were renewed and new colours, decorative elements, seating areas and extensive signing in Dutch, English and Japanese were created.

4.1.2 Retail mix and areas

Stadshart Amstelveen is situated around a central square with a library and art library on the west side, and a cultural zone on the south edge including a venue for popular music, a school for music and dance, a theatre and an institution for adult education (Volksuniversiteit). On the north and east side of the square are some restaurants with terraces and apartments on top. The centre further contains the Cobra museum and a congress centre with a residential tower that are located on the Sandbergplein in the north west of the centre. There are two weekly markets held in the centre; one of more than 200 stands on Fridays and a smaller biological market on the Rembrandtweg on Tuesdays. The shopping area of the centre exists of several distinguishable parts that have their own focus in terms of positioning and merchandise mix (see figure 4.1 for more details). The branch mix is displayed in figure 4.2. The Binnenhof square is the busiest part of the centre, while Friday is the busiest day because of the food market. The centre takes in approximately 12 million visitors yearly.

4.1.3 Competition

In terms of daily shopping Stadshart Amstelveen receives the biggest local competition from the shopping centres Kostverlorenhof, Groenhof, Middenhoven en Westwijk in Amstelveen. For non-daily shopping the competition is formed by Amsterdam city centre, the area around the PC Hooftstraat, Hoofddorp city centre and the shopping centre on Gelderlandplein (see figure 4.3). The latter is probably the biggest direct competitor, because



Area	Positioning	Tenants	Remarks
1. Rembrandthof	- Upper-middle	- Bijenkorf, H&M, The Sting - Triumph	- Covered area
2. Rembrandthof	- Food - Daily products	- AH - Etos	- Connection to
3. Nieuwe Loopveld	- Value for money - Quality fresh foods	- C&A - Butcher, bakery, delicatessen	- Indoor and outdoor area
4. Binnenhof	- Middle-level	- Levis, Expresso, Wolfords	- Covered area
5. Binnenhof (HEMA square)	- Middle level - Personal care	- HEMA, ZARA, Blokker - M&S, WE - Douglas, Rituals, The Body Shop - Juicy Details	- Covered area - Kiosks in the centre - Natural daylight - Lounge area
6. Binnenhof	- Middle-level	- Esprit, Mexx, Vero Moda - Ros Mode, Van der Heijden - I-centre / Apple	- Covered area - Toilets
7. Dames- & Herenstraatje	- Middle-level	- Steps, SPS Superstar, Xenos - Brandnew Stores	- Covered area
8. Buitenplein		- V&D, Björn Borg - McDonald's, cafetarias	- Kiosks in the centre - Seating area
9. Binnenstraat	- Fashion	- Bitter	
10. Stadsplein (town square)	- Gastronomy - Cultural facilities	- Restaurants / cafés	- Outside terraces - Friday market
11. Rembrandtweg	- Middle-level	- Wereldwinkel, bicycle store	- Not owned by Unibail-R.
12. Rembrandtweg	- Upper-middle - Commercial	- Hugo Boss - Specialty shops, boutiques	- Open air high street - Not owned by Unibail-R.

FIGURE 4.1 – DISTINCTIVE AREAS IN STADSHART AMSTELVEEN

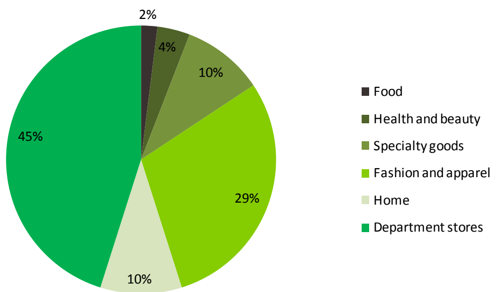


FIGURE 4.2 – BRANCH MIX OF STADSHART AMSTELVEEN (in Gross Leasable Area)

Shopping venue	Net Leasable Area	Description
Amsterdam city centre	240.000 m²	Attractive historic core area with extensive retail, cultural offer and other functions
PC Hooftstraat and around	21.240 m²	Most well known up-market retail street of the Netherlands
Gelderlandplein	14.900 m²	Covered and complete shopping centre with good parking facilities, some up-market fashion retailers and a Japanese/Korean food shop. There plans for extension with 12.000 m² GLA and a cinema.
Hoofddorp city centre	60.520 m²	Covered and complete shopping centre owned by Unibail-Rodamco that was recently redeveloped and extended.
Kostverlorenhof	4.500 m²	Covered neighbourhood centre with two supermarkets (AH and Dirk) and several expat shops such as a British expat supermarket, two Japanese food stores, a Japanese book shop, Japanese restaurant and a Japanese hairdresser. Bad routing but functioning well.
Groenhof	4.100 m²	Covered, complete and convenient neighbourhood centre with two supermarkets (AH and Jumbo) that is functioning well.
Middenhoven	1.720 m²	Covered and introvert neighbourhood centre. Possible extension with 1.000 m².
Westwijk	2.640 m²	Small, covered neighbourhood centre with plans for extension.

FIGURE 4.3 – PENETRATION OF STADSHART AMSTELVEEN AND COMPETITION

of its good location, parking facilities and retail mix including some up-market fashion retailers. Gelderlandplein also has plans for expansion with a second floor, 12.000 m² of retail space and a cinema. The zoning plan has to be modified however, to make those developments possible ("Uitbreiding Gelderlandplein", 2010). With regard to expats Gelderlandplein and Kostverlorenhof are the main competitors because specific shops and services for them can be found here, especially for Japanese expats. Another concentration of Japanese stores, restaurants and services such as a hairdresser and dry cleaning can be found just south of Gelderlandplein on the van Boshuizenstraat and Kastelenstraat.

4.1.4 Population of catchment area

Stadshart Amstelveen is located in a very densely populated area. The catchment area of the centre, contains approximately 1.600.000 inhabitants (see figure 4.4). The expatriates in this area are primarily located in Amsterdam city centre, Oud-Zuid, Oud-West, and the quarter of Buitenveldert, and Amstelveen. In Amstelveen expats are quite evenly distributed, but relatively a lot of them live in Stadshart and Westwijk. For Amstelveen a population growth from 80.000 inhabitants to 85.000 inhabitants is expected in the next five years. Twelve percent of those are foreigners, of which approximately 7.000 (9%) can be regarded as expats. Similar to the rest of the population

Catchment area	Towns included	Inhabitants
1. Primary (10 min. drive time)	- Amstelveen - Buitenveldert	99.73
2. Secondary (20 min. drive time)	- Amsterdam-South - Ouderkerk a/d Amstel - Uithoorn - Haarlemmermeer - Aalsmeer - Hoofdorp - Diemen - Weesp	555.65
3. Tertiary (30 min. drive time)	- Amsterdam-North - Zaandam - Beverwijk - Haarlem - Nieuw-Vennep - Maarssen - Bussum - southern Almere	1.090.670

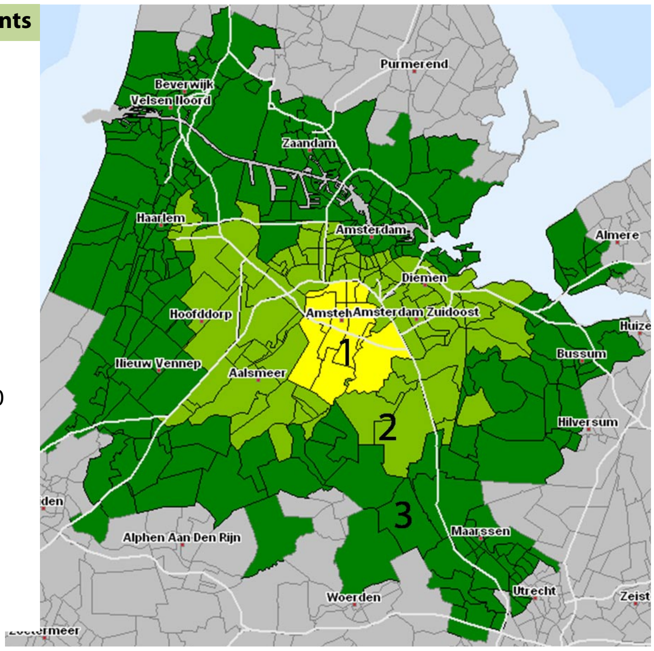


FIGURE 4.4 – CATCHMENT AREA OF STADSHART AMSTELVEEN (based on 10/20/30 minutes drive time)

the number of expats is expected to steadily increase until 2015 because of strong inflow of expats from Asian countries such as India (Amstelveen Municipality, 2008; 2009). The number of expatriates in the greater Amsterdam region has an approximate inflow of 10.000 people annually (Amsterdam Municipality, 2007).

The population of Amstelveen exists for around 20% out of people of 65 years or older, which is relatively high if compared to the national average of 14%. The city accommodates a lot of one-person households (41%) due to the number of elderly and students, and relatively little households are families with children (30% compared to 35% nationally). The foreigners in the town are mostly between 25 and 44 years old. The average income in Amstelveen lays 14-18% above of the national average. The average income of the inhabitants in the south of Amsterdam is also relatively high (Amstelveen Municipality, 2009; CBS 2010).

Stadshart Amstelveen has a penetration rate (i.e. the rate of people that has visited the shopping centre at least once during a period of 12 months) of 98% in the primary, 60% in the secondary and 35% in the tertiary catchment area. Families with an above average income and empty nesters have a relatively high penetration in the secondary catchment area and pre-family households a relatively low penetration. The actual visitors of the centre have a rather high spending basket, but compared to the catchment area there is a relatively low representation of higher incomes.

4.1.5 Conclusion

To conclude this paragraph and identify some initial possibilities with regard to targeting expats an analysis of the centre has been made in terms of strengths, weaknesses, opportunities and threats (SWOT). The content is presented in table 4.1 and is based on existing self-analyses of Stadshart Amstelveen by Unibail-Rodamco and on the author's observations. Unique selling points of the centre are the good accessibility, the available parking facilities, the presence of a Bijenkorf and the fact that the centre is covered. Other strengths are the broad offer in fashion in the middle and high-end segment, and the offer in health and beauty. Weak points in the retail mix are the limited focus on daily products and the representation of interior design, consumer electronics and goods such as jewellery and accessories. There are also relatively limited large-scale units. Furthermore, the offer of gastronomy lacks variety and quality. In addition the centre doesn't offer any noteworthy specialty shops for expats, except for one sushi shop and Japanese restaurant. In that respect Gelderlandplein and Kostverlorenhof form a threat. Gelderlandplein is also threatening because of its expansion plans and the 1.5 hours of free parking that is offered there. Besides also Amsterdam city centre is a constant strong competitor. Opportunities are found in the repositioning of the centre with international brands, the expansion of the centre and the redevelopment of the area related to the A9 tunnel-project.

When comparing this SWOT analysis to the overview of shopping centre attributes that could be adaptable to culture from chapter 3 (figure 3.2) some opportunities become apparent for Stadshart Amstelveen with regard to expats. For example the expansion and repositioning of the centre that offers possibilities in terms of retail mix, brand mix and catering facilities. When selecting tenants the preferences of expats towards brands and concepts can easily be kept in mind. The results of the questionnaire will provide more detailed insight in opportunities for adjustments of Stadshart Amstelveen to target expatriates.

TABLE 4.1 – SWOT ANALYSIS OF STADSHART AMSTELVEEN (based on data from Unibail-Rodamco and own observations)

Strengths	**Weaknesses**
- Good accessibility and parking facilities	- Relatively high parking tariff
- Department stores (Bijenkorf, V&D, HEMA)	- Weak representation of interior, electronics and goods
- Fashion offer (for women and family fashion)	- Limited focus on daily products
- Covered shopping	- Limited variety of gastronomy offer
- Friday market	- Limited large scale units
- English and Japanese signage	- Introvert atmosphere and inhospitable plaza

Opportunities	**Threats**
- Internationalisation of brand mix	- 1,5 hours of free parking at Gelderlandplein
- Expansion of the centre	- Expat shops at Gelderlandplein and Kostverlorenhof
- Redevelopment of area related to A9 tunnel	- Competition non-daily of Amsterdam city centre
	- Development plans of Gelderlandplein

4.2. Design of questionnaire

IIn this study a questionnaire is used as an instrument to collect information about attitudes, opinions, feelings, thoughts and knowledge of the respondents. The questionnaire is written, structured and self-administered, because it is a convenient way to reach a relatively large amount of people in a short time (Baarda & de Goede, 2006). Despite some bias that occurs due to the selective memory of respondents, more accurate ways of data collection such as observations require specialised knowledge and are too time-consuming and costly to perform in this case. The survey is held online, facilitating automatic routing through the questions, making results directly available, and allowing people to respond whenever they want. The response scales are pre-coded as much as possible, to make the questionnaire more easy to complete and to limit the amount of data. The results from the interviews in the initial phase are used to ensure that all possible response categories are incorporated. Open questions are only used when a motivation, reason or additional information is required, or if only limited information on the specific topic is available beforehand. In general the question types and response instruments vary greatly throughout the questionnaire to keep the attention and interest of the respondent.

4.2.1. Linguistic and conceptual equivalence

When conducting a cross-cultural study there is always the problem of linguistic and conceptual equivalence. It is related to the fact that some concepts have a different meaning in another language, or are even untranslatable (for example the Dutch concept of 'gezellig' can be described by words like cozy, fun, warm and together, but doesn't have a true equivalent in English). In this case the problem will mainly occur with the Japanese group, especially because some of them (presumably women without a job who have accompanied their husbands to the Netherlands) may not be familiar enough with the English language to answer the questions correctly. A great amount of non-response and high unreliability might occur for that reason. To reduce these effects and increase the response the questionnaire was translated into Japanese.

An often used solution for linguistic and conceptual equivalence is translation/back-translation, where the questionnaire is translated into another language and then translated back by two bilinguals to check for conceptual equivalence. In this case a slightly different approach is used because of practical and financial reasons. The questionnaire was initially formulated in English and was checked for interpretation and formulation with English native speakers during the interviews. Unclarities due to translation or presentation were eliminated. Subsequently the list was translated into Japanese, and checked by Japanese native speakers. The interpreter is a native Japanese academician in Japan Studies at Leiden University, who has experience with translation and studies in social sciences. The Japanese version of the questionnaire was checked with three respondents and native speakers on paper, during which a few interpretational issues came across. The corrected online version was checked twice completely by the interpreter as well as once by a colleague of the interpreter. Given the available resources, the applied approach seemed to be the right compromise between obtaining the desired response among Japanese expats and solving the problem of linguistic and conceptual equivalence. For the translation of the results a similar strategy was used. Nonetheless, continuous attention regarding linguistic and conceptual equivalence is needed while interpreting the results.

4.2.2. Metric equivalence

From a cross-cultural perspective the use of Likert-type scales forms a point of attention too. This is related to metric equivalence: the differences in response style across cultures. In some cultures for example people are more likely to give extreme answers on a 5- or 7-point Likert-type scale than others. The results of a study by Chen, Lee and Stevenson (1995) among Japanese, Chinese, Canadian and US students, show that the Japanese and Chinese students are more likely to use the midpoint on the scale, and that US students more often use extreme values. This behaviour correlates with the strength of endorsement of individualism. Another explanation is a difference in meaning of answers, since the mid-point on a Likert-type scale may mean 'no opinion' in the US, while in Korea it may mean 'mild agreement' (de Mooij, 2004). When interpreting the results the effects of this phenomenon will be kept in mind.

4.2.3 Questions and response scales

The operationalisation of concepts from the conceptual model into questions and response scales will be discussed in the following paragraph. Some limitations attributable to the cross-cultural nature of the study will be emphasized as well. For as far as possible the questions and response scales are similar or based on questions from previous studies that Strabo has conducted for Unibail-Rodamco on Stadshart Amstelveen (2008a; 2008b; 2009; 2010) in order to keep data comparison possible. The final questions have been determined in consultation with Unibail-Rodamco and Strabo. The entire questionnaire can be found in Annex 8 in English and in Annex 9 in Japanese.

Cultural values

Personal values

As explained in chapter 2, several theories and methods have been developed to measure values, but all of them have some methodological disadvantages that are unfortunately inherent to cross-cultural research. The method used to measure values therefore depends on external conditions that follow from the research itself, such as validity, the depth and understanding of the studied cultures, and the available resources like time and money. In that respect the List Of Values by Kahle offers the best prospects. Despite some cross-cultural limitations, the method is very apt in such a study due to the world-wide test coverage and the ease of use. How the issue of conceptual equivalence will be handled was discussed in paragraph 4.2.1. The exact formulation of the question is displayed in figure 4.6.

Shopping values

The idea of shopping values was elucidated in chapter 2. Shopping values are related to hedonic and utilitarian shopping dimensions, and will be measured by the statements related to the five shopping values that Seo and Lee (2008) determined: efficiency, experiential, diversional, reliable and self-expressive shopping value. This typology has not been applied very often yet and is up for further development, but it does offer possibilities for practical applications for the definition of target groups. The ten statements are literally the same as those defined by Seo and Lee (see figure 4.7). Responses are indicated on a 5-point Likert-type scale with a range from completely disagree to completely agree. The effects of metric inequivalence (§4.2.2) will be taken into consideration while interpreting the results.

Question 22

Please indicate the three values that are most important to you in your personal life by distributing the grades 1 to 3 among three values below? (1 = 'most important', 2 = 'second most important', 3 = 'third most important').

- Sense of belonging	1. ______________________
- Excitement	2. ______________________
- Fun and enjoyment in life	3. ______________________
- Warm relations with others	
- Self-fulfillment	
- Being well-respected	
- Sense of accomplishment	
- Security	
- Self-respect	

FIGURE 4.6 – QUESTION AND RESPONSE SCALE REGARDING PERSONAL VALUES

Question 21

Please indicate what your attitude is towards shopping in general by reacting on the following statements.

	completely disagree				completely agree
The time required for shopping has a big influence on my shopping experience	1	2	3	4	5
- A store visit is good when it is over very quickly.	1	2	3	4	5
- Shopping trips are truly a joy.	1	2	3	4	5
- I enjoy shopping trips for its own sake, not just for the items I may purchase.	1	2	3	4	5
- Shopping trips truly feel like an escape.	1	2	3	4	5
- While shopping, I am able to forget my problems.	1	2	3	4	5
- I prefer to visit stores that have high reliability for product.	1	2	3	4	5
- A store is good because it has many well-known brands.	1	2	3	4	5
- While shopping I feel self-conscious.	1	2	3	4	5
- I identify myself with the store that I am shopping in.	1	2	3	4	5

FIGURE 4.7 – QUESTION AND RESPONSE SCALE REGARDING SHOPPING VALUES

Evaluation of shopping centre attributes

To measure the evaluations of shopping centre attributes a list of attributes (see figure 4.8) has been composed based on figure 3.2, in which an overview was provided of the shopping centre attributes that are expected to be evaluated differently across cultures and that play a role in the shopping behaviour of expats. The attributes 'fashion and trend sensitivity' and 'promotions and events' were emphasized by Unibail-Rodamco and were therefore included. 'Leisure facilities' was not separately included to limit the number of attributes and increase the response rate, and the five attributes related to quantity, quality, choice, pricing and products of shops were reduced to a single attributed called 'retail mix'. A separate question was introduced to find out about the products that expatriates can't find in the Netherlands (see question 13 in Annex 8).

Respondents are asked to indicate the importance of shopping centre attributes in their decision on where to shop on a 5-point Likert-type scale from unimportant to important. A similar question measures the satisfaction regarding the previously mentioned attributes with regard to Stadshart Amstelveen. Another question measures the overall level of satisfaction regarding the centre on a 10-point scale. Three open questions on missing retailers and facilities and other recommendations are included as well. Question 20 (see Annex 8) is added to gain insight in particular services that expats might be interested in and might trigger them to visit Stadshart Amstelveen more frequently.

Question 8					
Please indicate the importance of the following aspects in your decision as where to shop.	unimportant				important
- location / accessibility of the centre	1	2	3	4	5
- parking facilities	1	2	3	4	5
- retail mix	1	2	3	4	5
- opening hours of stores	1	2	3	4	5
- catering facilities	1	2	3	4	5
- facilities and services	1	2	3	4	5
- atmosphere of the centre	1	2	3	4	5
- covered shopping	1	2	3	4	5
- personal space and privacy	1	2	3	4	5
- orientation and way-finding	1	2	3	4	5
- design of the centre and public space	1	2	3	4	5
- fashion and trend sensitivity	1	2	3	4	5
- service by personnel	1	2	3	4	5
- promotions and events	1	2	3	4	5

FIGURE 4.8 – QUESTION AND RESPONSE SCALE REGARDING IMPORTANCE OF SHOPPING CENTRE ATTRIBUTES

Shopping behaviour

Shopping behaviour was defined as the outcome of an individual's decision-making process based on the evaluation of shopping centre attributes under the influence of values and attitudes. The concept is operationalised by measuring choices of respondents, i.e. the shopping venues a respondent visited during a year's time, the favourite shopping venue of respondents, the visit frequency, the main points of purchase for products from different product categories and gastronomy, the main point of purchase for products that expats are unable to find in regular Dutch stores, favourite brands and the use of information sources. For shopping location and visit frequency a distinction is made between daily and non-daily shopping trips. This classification is closely linked to the categorization of utilitarian and hedonic shopping values. Hence, a relation with shopping values may be found in the results. For visit frequency and point of purchase a distinction is made between the favourite shopping venue of the respondent and Stadshart Amstelveen. The selected product categories (food, personal care, clothing, books and media, home wares) are commonly used, and also appear to be the most relevant in terms of products that expats can't find. To gain further insight in the visiting behaviour of expats in Stadshart Amstelveen some questions were introduced on customer motivation whether to visit or not, and time of visit.

Characteristics

The questionnaire ends with some enquiries on the personal characteristics of the respondents. The main questions here are those that ask for the cultural background of the respondent and the identification with his or her cultural background. The question on cultural identification was taken from the study of Shim and Eastlick (1998), where 'ethnicity' was replaced by 'cultural background'. Other questions ask for the respondent's gender, age, level of education, household structure, daily occupation, income, zip code, the time the expatriate has been living in the region of Amsterdam or Amstelveen, and the way in which the respondent was notified on the questionnaire in order to gain insight in the evenness of the distribution of respondents among the used sample frames.

4.2.4. Structure of the questionnaire

The questionnaire starts with a short introduction and instruction. In the online version respondents can choose their preferred language here: English or Japanese. A progress bar is showed on each page during the survey. The questions are placed in a logical order as much as possible and in such a way that the order of the questions doesn't influence the answers. The questionnaire starts with a set of questions on the general shopping behaviour of the respondent including choice of location, shopping pattern and main points of purchase. The respondent is asked to indicate if he or she ever visits Stadshart Amstelveen. If so, the respondent is asked to answer questions regarding his satisfaction with Stadshart Amstelveen. The questions on personal values and shopping values are placed towards the end because these might be too direct to start with. The survey ends with inquiries on demographic characteristics, since such questions are easy to answer and respondents will probably not quit the questionnaire once they got there. It is also less offending to ask questions on age and income at the end. The length of the questionnaire is limited; from pre-testing the questionnaire during the interviews followed that it will take respondents approximately 15 minutes to complete it. Keeping the length of the questionnaire limited is important, since especially in combination with a language problem there is a high risk of non-response (Shim & Eastlick, 1998). In the online version several questions were linked to each other to make it easier for respondents to fill it out and to limit mistakes.

4.4. Procedure

The research population contains all Japanese, American and British expats that live within the 30-minutes catchment area of Stadshart Amstelveen. Because no sample frame is available that allows distribution of questionnaires among all expats within the population, other ways of distribution have been used. Initial investigation of 'hot spots' for expats lead to a number of schools, associations, networks, and websites that were asked to include a notification in their newsletter or on their website. Those places are a good starting point for distribution since a lot of expats are a member of an expat association or network, and send their children to an international school. After three weeks when the response was stuck at N=50 additional posts were placed on a number of other websites, and flyers were distributed and handed out on strategic locations and times as well. A child care organization with a lot of expat children included a notification in their newsletter. A complete overview of the used distribution channels is provided in Annex 10. The survey was online for seven weeks from 23 April to 11 June 2010. To stimulate respondents to participate five Bijenkorf-vouchers of €50 were raffled among them if they provided their address.

4.5. Sample descriptives

4.5.1. Response

As discussed in the previous chapter, several methods of data collection were applied. People were notified on the questionnaire via numerous ways: via websites, newsletters, flyers and even some paper questionnaires were distributed. Because of this approach it is unknown how many people have been reached, and what the response percentage is. For the online version though, a total of 202 people have activated the questionnaire by clicking on the link. Of those, 101 have fully completed the survey and 92 have aborted the survey before completion. Nine people have completed the survey with missing values; this means that minor information such as a zip code is missing. During a parents' breakfast morning at the Amsterdam International Community School approximately 45 paper questionnaires were distributed, of which 11 were fully completed, and 12 contained minor missing values. In the analysis only the cases that are fully complete and that have limited missing values are taken into account (N=133). Where necessary the cases with limited missing information will be excluded from analysis as well. Of the people that completed the survey the greatest amount was notified on the questionnaire via their children's school (46%). Other important distribution channels were Expatica.com, BaiBai-net, and Elynx. 76% of the respondents that completed the questionnaire took it in English; 24% in Japanese.

4.5.2. General characteristics

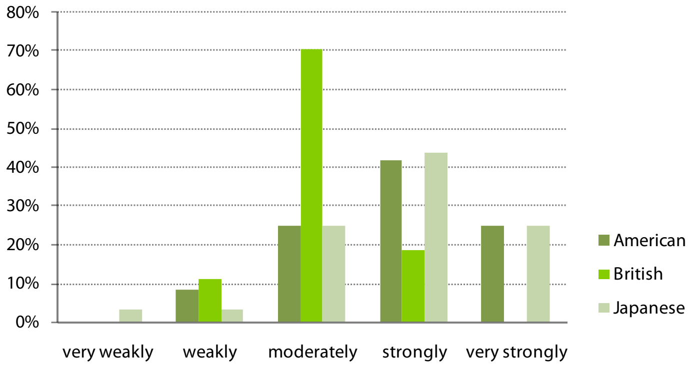
Cultural background

The questionnaire principally targeted American, British and Japanese expatriates. Indeed, as is shown in table 4.2 those form the largest groups of respondents. There were 24 Americans, 27 British and 32 Japanese that completed the survey. In addition 49 respondents from 21 different cultural backgrounds and two respondents with mixed cultural backgrounds completed the survey as well. Nationalities that occurred rather often were Indian (9x), Canadian (6x) and Australian (5x). The high number of Indians is explained by their increasing share in the population of expats. The high number of Canadians and Australians does not match with their share of population, but might be explained by the chosen distribution channels such as international schools, and by the fact that the survey was in English. The latter is also valid for Indians.

TABLE 4.2 – CULTURAL BACKGROUND

	Frequency	Percent
American	24	18%
British	27	20%
Japanese	32	24%
other	49	37%
SUBTOTAL	132	99%
missing values	1	
TOTAL	133	

FIGURE 4.9 – LEVEL OF CULTURAL IDENTIFICATION



Cultural identification

Respondents were asked to indicate how strongly they related to their cultural background. It appeared that on average expatriates maintain a moderate to strong connection with their cultural background. However, as figure 4.9 shows, the strength with which people identify themselves with their cultural background does differ for the three cultural groups. The British clearly hold a much weaker connection to their cultural background, while the Americans and Japanese relate much stronger to it. A one-way ANOVA (see §5.1.1) confirms that this difference is significant with a .001 probability.

Gender

The sample exists of 87% females and 13% males (table 4.3). This unequal gender distribution is caused by the way the survey was distributed. Since the number of male respondents (N=17) is very limited the results will not be transformed to create a more even distribution in the respondents answers. In addition, because of the limited sample size no separate analyses will be conducted on gender either.

Age

The age distribution of the sample is displayed in table 4.4. Over 95% of the respondents are between the age of 25 and 54. This distribution is not surprising since most people are expatriates when in their working age. The sample does contain more 45-54 year olds than expected, regarding figures of the municipality of Amstelveen (2009). The distribution of surveys via international schools is an explanation for this. The age distribution per cultural group differs slightly: among the Americans there are relatively more 45 and 54 year olds, and among the Japanese relatively more 25-34 year olds.

Household size and type

The average household size of the sample is 2.9, but as can be seen in table 4.5 two- and four-person households are overrepresented compared to three-person households. There are three missing values of respondents that indicated to have a household size of zero. Analysis of the household structure (table 4.6) shows that the sample exists for 54% out of families with children, which is a result of the chosen distribution channels. The majority of those are families with children younger than 10 years. 24% of the sample is made up of two-person households and 14% are one person households. The category 'other' contains households with more than two adults; most likely families with adult children. There are no noteworthy differences across cultures.

Level of education

Table 4.5 shows that the great majority (96%) of the respondents has received some form of higher education: 83% is academically educated, and 12% is educated on a professional level. This corresponds with the assumption that expatriates are generally highly educated. There are no significant differences across cultures.

TABLE 4.3 – GENDER BY CULTURAL BACKGROUND

	1 American	2 British	3 Japanese	4 other	Frequency total	Percent total
female	23	20	30	43	116	87%
male	1	7	2	7	17	13%
TOTAL	24	27	32	50	133	100%

TABLE 4.4 – AGE BY CULTURAL BACKGROUND

	1 American	2 British	3 Japanese	4 other	Frequency total	Percent total
20-24 years	1	1	0	1	3	2%
25-34 years	4	1	10	18	33	25%
35-44 years	8	15	14	21	58	44%
45-54 years	10	10	8	8	36	27%
55-64 years	1	0	0	1	2	2%
65 years or over	0	0	0	1	1	1%
TOTAL	24	27	32	50	133	100%

TABLE 4.5 – HOUSEHOLD SIZE BY CULTURAL BACKGROUND

	1 American	2 British	3 Japanese	4 other	Frequency total	Percent total
1 person	4	5	5	4	18	14%
2 persons	5	9	9	13	35	26%
3 persons	5	5	5	13	28	21%
4 persons	7	6	10	14	37	28%
5 persons	3	2	0	6	11	8%
SUBTOTAL	24	27	29	50	130	98%
missing values					3	2%
TOTAL					133	100%

TABLE 4.6 – HOUSEHOLD TYPE BY CULTURAL BACKGROUND

	1 American	2 British	3 Japanese	4 other	Frequency total	Percent total
one person	4	5	5	4	18	14%
two person	4	7	9	12	32	24%
family with kids <10	6	9	8	21	44	33%
family with kids 10-18	6	3	2	4	15	11%
family with mixed-age kids	3	1	2	3	9	7%
single-parent	1	2	1	2	6	5%
other	0	0	2	4	6	5%
SUBTOTAL	24	27	29	50	129	97%
missing values					3	
TOTAL					133	

TABLE 4.7 – LEVEL OF EDUATION BY CULTURAL BACKGROUND

	1 American	2 British	3 Japanese	4 other	Frequency total	Percent total
secondary education	0	3	0	1	4	3%
professional education	1	4	2	9	16	12%
university education or higher	23	20	30	38	111	83%
do not want to say	0	0	0	2	2	2%
TOTAL	24	27	32	50	133	100%

Daily occupation

The most frequently occurring daily occupations in the sample are house wife and a full time job, both occurring among approximately one third of the sample as is illustrated in table 4.8. Another 17% has a part time job and 9% is autonomous or working freelance. As expected a lot of house wives were reached via schools. The respondents with a full time job were reached via all utilized distribution channels. Among the Japanese mainly housewives responded, among the British mainly employed respondents.

Income

In accordance with the expectations regarding the income level of expatriates 44% of the sample has an average net household income higher than €3.500 per month (table 4.9). A total of 59% has an above average income. A quarter of the respondents did not want to indicate the height of their income level. The income distribution does not seem to differ across the three cultures.

Zip code

The distribution of respondents over the catchment area is displayed on the map in figure 4.10. The first, secondary and tertiary catchment areas are indicated with the numbers 1, 2 and 3. Almost half of the sample is from the primary catchment area, 29% from the secondary catchment area and 17% from the tertiary catchment area. Six respondents are from elsewhere (such as Leiden and The Hague) and there are five missing values. The distribution of cultural groups over the catchment areas is shown in table 4.10 and on maps in Annex 10. The distribution of nationalities over the primary catchment area approaches the actual population distribution in that area. This means that indeed almost all Japanese live in the primary catchment area, while the British and Americans are more dispersed over the entire catchment area. The Americans are dominant in the secondary catchment area.

Years lived in the region of Amsterdam and Amstelveen.

The range of years that respondents have been living in the Amsterdam region lies between 0 and 28 years, with a median of 3 years. Four respondents did not answer this question. The great majority of expats (71%) has lived here for less than 5 years. Another 17% has stayed between 5 and 10 years. Just over ten percent of the expats has lived in the region for over 10 years. Despite their time in the Netherlands, the latter group can still be regarded as expats. First of all several of them made critical comments about shopping in the Netherlands, and almost all of them named products from their country-of-origin they missed and bought elsewhere. Secondly no correlation was found between the number of years in the region of Amsterdam and a weakened cultural identification.

4.6. Conclusion

In this chapter the data collection was discussed and concretized by introducing the case of Stadshart Amstelveen, discussing the design of the questionnaire, the data collection procedures and the description of the sample in terms of response and general characteristics. The analysis of the case of Stadshart Amstelveen indicated that there seem to be possibilities for adaptation of certain attributes to preferences of expatriates as a result of repositioning and expansion plans. Subsequently, a questionnaire was developed in English and Japanese. The main questions cover personal values, shopping values, the importance and satisfaction regarding shopping centre attributes and shopping behaviour, including choice of shopping venue, visit frequency, main points of purchase, favourite brands and the use of information sources. The questionnaire allows to compare differences between cultural groups and to explore interesting relations between concepts, for example by choosing a scale of shopping values that is both an extension of the literature and offers practical applications for the definition of target groups, and by including shopping values next to personal values. Concerns related to cross-cultural research linguistic, conceptual and metric equivalence. When interpreting the results these concerns need to be taken into account. Finally, the data collection led to a sample of 133 valid cases of which 24 American, 27 British and 32 Japanese. The sample is dominated by female respondents that are highly educated and have a high disposable income. Among the Japanese there are relatively a lot of housewives, and the Japanese are concentrated in the primary catchment area. Besides, the British hold a much weaker connection to their cultural background. Further results of the questionnaire will be discussed in detail in the next chapter.

TABLE 4.8 – DAILY OCCUPATION BY CULTURAL BACKGROUND

	1 American	2 British	3 Japanese	4 other	Frequency total	Percent total
full time job	6	12	3	20	41	31%
part time job	5	6	3	9	23	17%
autonomous / freelance	1	3	3	5	12	9%
student	1	1	2	1	5	4%
retired	0	0	0	1	1	1%
house wife / man	9	3	20	13	45	34%
other	2	2	1	1	6	5%
TOTAL	24	27	32	50	133	100%

TABLE 4.9 – AVERAGE NET HOUSEHOLD INCOME PER MONTH BY CULTURAL BACKGROUND

	1 American	2 British	3 Japanese	4 other	Frequency total	Percent total
less than €1.300	1	1	3	1	6	5%
between €1.300 and €1.900	3	0	1	1	5	4%
between €1.900 and €2.600	1	2	3	3	9	7%
between €2.600 and €3.500	3	7	5	6	21	16%
more than €3.500	10	9	12	27	58	44%
do not want to say	6	8	8	12	34	26%
TOTAL	24	27	32	50	133	100%

TABLE 4.10 – DISTRIBUTION OVER CATCHMENT AREA BY CULTURAL BACKGROUND

	1 American	2 British	3 Japanese	4 other	Frequency total	Percent total
primary catchment area	6	12	23	22	63	47%
secondary catchment area	11	8	3	15	37	28%
tertiary catchment area	5	6	2	9	22	17%
other	2	1	1	2	6	5%
SUBTOTAL	24	27	29	48	128	96%
missing values					5	
TOTAL					133	

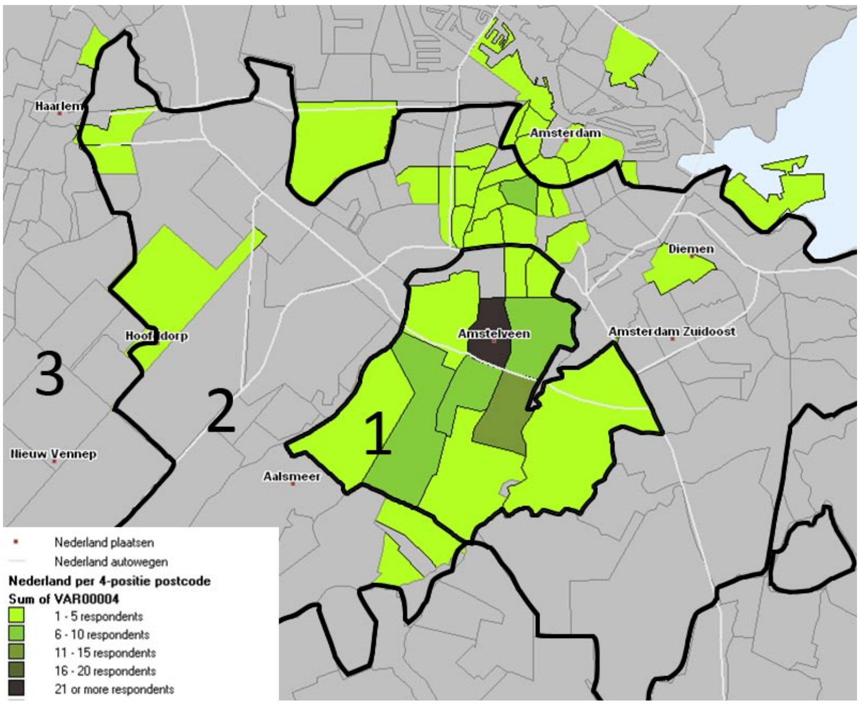


FIGURE 4.10 – RESPONDENTS ACCORDING TO CATCHMENT AREA

TYPICAL PARKING AREA AT WAL-MART, USA (SOURCE: FLICKR.COM)

5. DATA ANALYSIS AND RESULTS

In the previous chapter the methodology of data collection with an online survey was discussed, as well as the operationalisation of variables into questions and response scales, and the description of general characteristics of the sample. This chapter will cover the results of the data collection and analysis in more detail, starting with an overview of the applied statistical techniques. Subsequently the results are analysed in order to answer each of the research questions, and compared to the outcomes of previous studies by Strabo on Stadshart Amstelveen. The data is also enriched with data on lifestyle profiles by Experian. Note, that when an analysis is conducted on the total sample of expatriates this includes the group with a cultural background other than American, British and Japanese as well.

5.1. Data analysis

The collected data will be analysed in a number of different ways based on the research questions asked. However, firstly, for all variables frequency distributions are generated and explored for interesting and remarkable scores. Secondly, various approaches are used to analyse the data for differences between groups and for correlations between variables. These techniques will be discussed in this paragraph. For all tests the significance level is set at .05, meaning that there is a probability (p) less of than 5% that the results occurred by chance. However, when complementary results point into a certain direction, p-values below .1 are also accepted, but only based on a sufficient amount of respondents.

5.1.1. Differences between cultural groups

Research questions 1, 2 and 4 investigate specific differences between the three cultural groups. Based on the level of measurement of the variables different techniques can be used to statistically test these differences. Note, that for the between-group comparisons respondents with a nationality other than American, British or Japanese are excluded from the analysis.

For data on a nominal level a Chi-square test is used, since the data is based on an independent selection. The only necessary assumption for this test is that in 2x2 contingency tables no cells have an expected count of less than 5, and that in larger tables a maximum of 20% has an expected count less than 5.

The data generated by the questions on importance, satisfaction and shopping values are analysed with a one-way analysis of variance (ANOVA). In social sciences it is commonly assumed that the distances between the points on a Likert-type scale are equal, and that therefore the data may be analysed on an interval level. A one-way ANOVA is then the obvious approach to measure differences on independent variables between two or more groups. It has to be kept in mind here that the groups' sample sizes are rather small and only just above the accepted level for parametric statistics, which makes generalizations difficult. The data are not normally distributed, but since ANOVA is a robust test (Field, 2009) this is not much of a problem. A Levene-test is used to check if the variances between groups are not too different. If the Levene test indicates that the variance is too large, the Welch's F value is checked instead of the F-ratio to determine if the scores differ significantly. In case the difference is significant three post hoc-tests are performed to verify for which between groups-scores this applies: a Bonferroni's test, a Gabriel's pairwise test and a Games-Howell test. The first test checks upon Type I errors for small samples, the second test is applicable when relatively small differences occur in sample sizes and the third is an extra test that covers for variance inequivalence (Field, 2009). The three tests are all reviewed as a kind of extra check, because of the small sample size, the large variance inequivalence, and the risk for including Type I errors.

The questions on importance, satisfaction and shopping values each consist of a set of statements; therefore the data analysis can be taken a step further by conducting an exploratory factor analysis or Principal Component Analysis. This technique determines if there are underlying dimensions (factors) that can be distinguished from the set of variables. For each dimension a factor score is generated per respondent. On those scores a one-way ANOVA can be applied to examine differences between the groups on the different dimensions. For each factor analysis the Kaiser-Meyer-Olkin measure has to be higher than .5 and the Bartlett's test of sphericity should be significantly small, indicating that the sample size is adequate and the correlations between the variables are large enough to perform this type of analysis. The factors with an eigenvalue of >1 are extracted, and they are rotated orthogonally by VARIMAX.

Apart from exploring differences per group on the dimensions that are determined using the entire sample, the underlying dimensions might differ as well between groups. Therefore separate factor analyses are conducted as well for each cultural group. By doing so the KMO-measure may be violated due to the small sample size, but the analyses are merely conducted for further insight and no final conclusions will be solely based on them.

5.1.2. Correlations between variables

In order to answer the research questions 3, 5 and 6 statistical tests investigating correlations are executed. Again the type of test depends on the level of measurement of the variable. Part of the data was collected using a nominal scale, for instance on personal values. Correlations with this data can only be analysed on a nominal scale using a contingency coefficient for correlation. However, the contingency coefficient is derived from Chi-square and is therefore only significant when Chi-square is significant as well. Therefore a Chi-square test will be applied just as described for the hypothesis of difference. The same assumption applies that in a 2x2 contingency tables no cells have an expected count of less than 5, and in larger tables a maximum of 20%. To achieve this some variables have been recoded into a smaller number of categories.

Data on an ordinal level were tested for correlation with Kendall's tau. This is a non-parametric test similar to the Spearman's rho, but better applicable when a relatively small sample is used. This was conducted for the relations with visit frequency and for the relation between shopping values and the evaluation of shopping centre attributes of Stadshart Amstelveen. Finally, one Pearson's r-test for correlation is executed as well. This is used for the correlation between the underlying dimensions from the factor analysis of importance and satisfaction.

5.2. Cultural values

This paragraph will discuss the results that provide an answer to research question 1 "What are the cultural values of the target groups?". As explained in chapter 4 there were two questions in the survey that measured values, namely one on personal values (Q22) and one on shopping values (Q21) (see Annex 8). The outcomes of these questions are explored for the total sample of expatriates and compared for the three target groups of American, British and Japanese expats.

5.2.1. Personal values

Respondents were asked to indicate the three values that were the most important to them in their personal life, in order of importance. To be able to conduct any further analysis the total of the first, second and third most important values are added up to form one score. In addition, for some analyses a distinction has been made between social affiliation and self-actualisation values according to Shim and Eastlick (1998). Social affiliation values comprehend sense of belonging, excitement and warm relationships with others, while self-actualisation values cover self-fulfilment, being well-respected, sense of accomplishment, security and self-respect.

For the total group of expatriates the most important values are clearly fun and enjoyment in life and warm relationships with others (see figure 5.1). Other values that score rather high overall are sense of accomplishment and security, and subsequently self-respect and self-fulfilment. Being well-respected, excitement, and sense of belonging have a rather low total score.

The relative scores of the three cultural groups on personal values are displayed in figure 5.2. American expats have warm relationship with others on the first place, followed by fun and enjoyment in life and sense of ac-

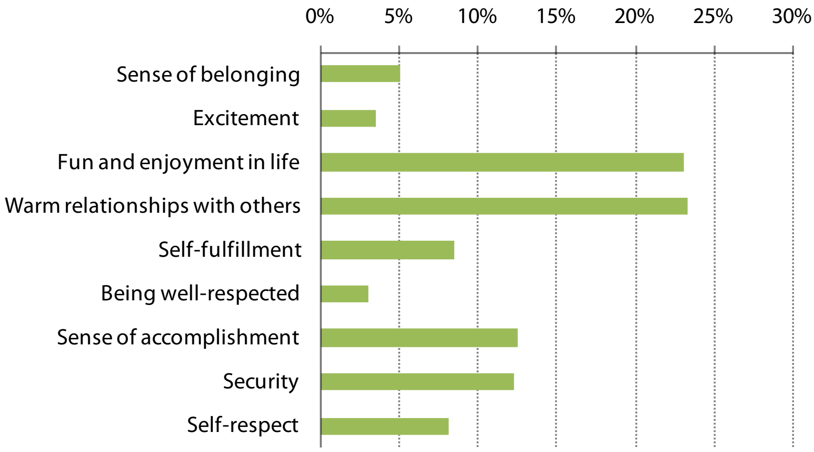


FIGURE 5.1 – PERSONAL VALUES FOR THE TOTAL SAMPLE

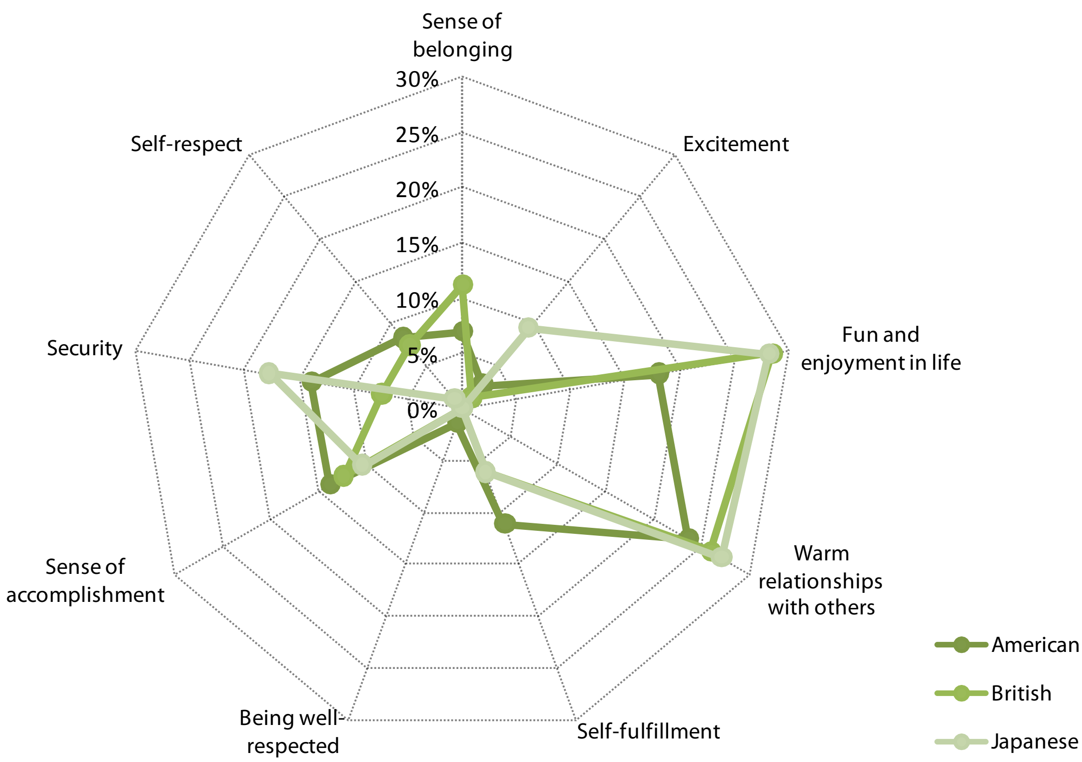


FIGURE 5.2 – PERSONAL VALUES PER CULTURAL GROUP

complishment. Security is on the fourth place. This ranking is somewhat different if compared to the outcomes of the study by Rose & Shoham (2000) on personal values of US and Japanese mothers. The US mothers ranked self-respect on the first place, followed by warm relationships with others and security. Japanese expats rate fun and enjoyment in life as the most important value just as the Japanese mothers from Rose and Shoham. On the se-cond place though is warm relationships with others, which was not that hight on the list of the Japanese mothers. Security is on the third place and sense of accomplishment on fourth. The British expats have fun and enjoyment in life and warm relationships with others as well on top of their value list. They also mentioned a sense of accomplishment and a sense of belonging several times. An interesting finding is that, while the Japanese sample is larger, their answers are more unanimous compared those of the Americans.

To find out if the differences per cultural group are significant a Chi-square test is applied. From this test follows that fun and enjoyment is a much less important value for the Americans compared to the British and the Japanese. Excitement and security are more important for the Japanese than for the British. On excitement the Japanese also score slightly higher than the Americans (significant with $p<.1$). On self-respect the British and American score higher than the Japanese. If compared to the outcomes of Rose and Shoham (2000) indeed a relatively high score for the Americans on self-respect and for the Japanese on security and fun and enjoyment in life is not surprising. In addition, a test was run as well to find out if the scores of three groups differed significantly on social affiliation and self-actualisation values, but this was not the case.

5.2.2. Shopping values

Respondents were asked to indicate to what extent they agreed with ten statements that embody various attitudes toward shopping on a Likert-type scale from 1=completely disagree to 5=completely agree. According to a study by Seo and Lee (2008) those statements identified five factors or shopping value dimensions: efficiency, experiential, diversional, reliable and self-expressive shopping value. Efficiency shopping value resembles the utilitarian shopping dimension and is related to time-awareness and time-efficiency. The other four constructs are associated with the hedonic shopping dimension: experiential shopping value is related to having interest in the shopping experience itself, diversional shopping value to feelings of escaping and problem diversion, reliable shopping value to the perception of product and brand reliability, and self-expressive shopping to self-consciousness and identification with the shopping environment.

When reviewing the scores of the entire group of expatriates it appears that they score high on product reliability and time awareness (figure 5.3). The lowest scores are found for diversional and self-expressive shopping values. The differences between the cultural groups are shown in figure 5.4. From a one-way ANOVA follows that the British and American group do not differ significantly in their shopping attitude. Remarkable is though that the Japanese expatriates score significantly higher on experiential shopping values than the other two groups. A $p<.001$ significant difference with both the Americans and British was found for the statement "shopping trips are truly a joy", and a $p<.005$ significant difference with the British for the statement "I enjoy shopping trips for its own sake". Additionally, the Americans clearly have a more efficient attitude towards shopping than the Japanese ($p<.01$ for efficient 1 and $p<.005$ for efficient 2). The Americans are also more likely to assess a store as good because it has many well-known brands. The Japanese on their turn are again more likely than the British to prefer to visit stores with a high reliability for product.

Apart from differences in scores for each individual statement, the scores on the total set of statements might also differ between groups. An exploratory factor analysis was carried out to see if similar underlying dimensions could be extracted. The factor loadings of the three extracted factors extracted can be found in Annex 11. The first component comprehends the experiential and diversional shopping values on the positive scale, and seems associated with **(1) hedonic shopping motives** and leisure since there is a negative factor loading for "a store visit is good when it is over very quickly". Component 2 covers the efficient and self-expressive values and brand- reliability, pointing towards a more **(2) functional dimension**. The third component is **(3) reliability**. Product-reliability takes a distinct position, since it is not associated with any other components but does have a high loading on the third component and also receive a high score in general from the entire group of expats. The results contrast with the findings by Seo and Lee (2008), since three instead of two factors were extracted, and since utilitarian shopping values do not only comprehend efficiency shopping values, but also self-expressive and brand-reliability values. The relation of efficiency and reliability might be a manifestation of functionality and saving time. The link with self-expressive shopping values could be explained by a kind of (uncomfortable) self-awareness that is associated with shopping for a purpose and not than with shopping as a leisure activity.

A one-way ANOVA was executed on the mean scores of the factor analysis to find out about any significant differences on the factor scores per cultural group. Interestingly, on hedonic dimension the Japanese score the highest and the British the lowest, resulting in a significant difference with both the British and the Americans. The same applies to the utilitarian dimension; the Americans score the highest and the Japanese the lowest, but there are significant differences for the Japanese group with both the Americans and the British.

In addition, and despite some statistical limitations with regard to sample size, three separate factor analyses were carried out for each cultural group to gain insight in differences per culture within the underlying dimensions. In this analysis shopping values related to reliability also form separate components for each group. However,

FIGURE 5.3 – SHOPPING VALUES FOR THE TOTAL SAMPLE

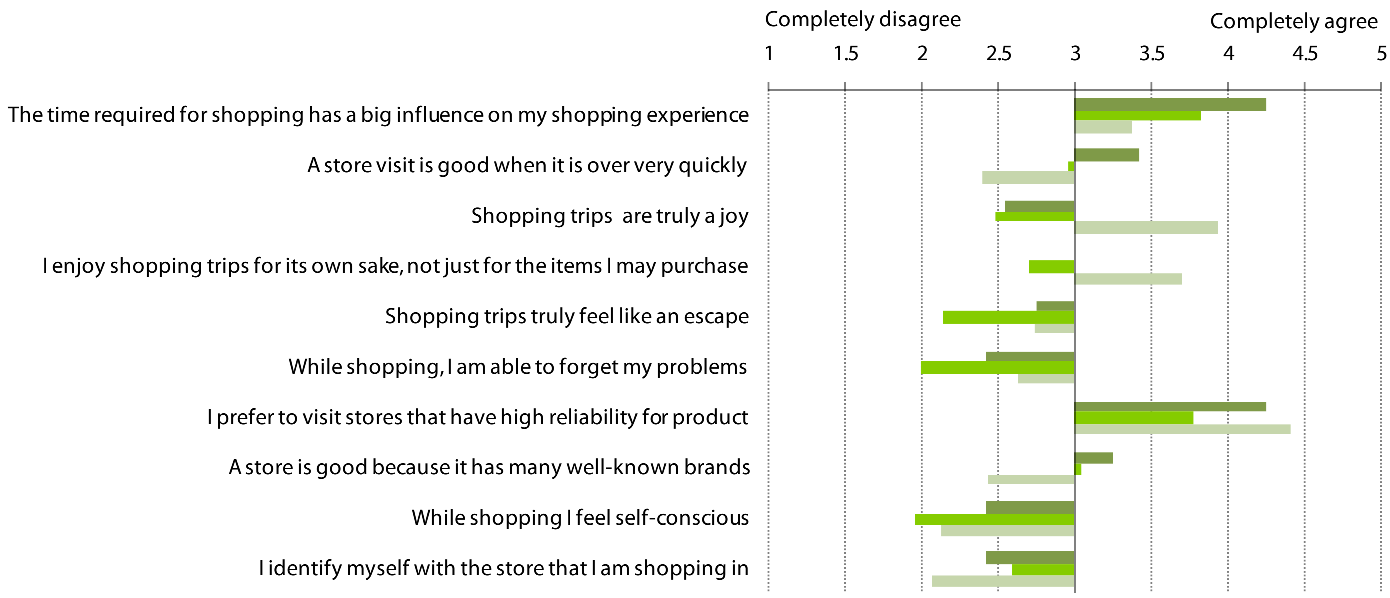


FIGURE 5.4 – SHOPPING VALUES PER CULTURAL GROUP

the other values with which they are related do differ per culture. For the Americans it is a complete stand-alone factor, while the British associate it with enjoying shopping for its own sake and self-identification with the store. For the Japanese product-reliability values are negatively associated with shopping trips that feel like an escape. The Japanese are also the only ones who associate brand-reliability and self-expressive values with a hedonic shopping attitude. Besides, for the Japanese group no clear utilitarian dimension can be recognized. They merely associate an efficient attitude with experiential shopping values in a negative way. These observations seem to point in the same direction as the literature: on the one hand the Japanese use shopping to fine-tune one's image, and the other hand they see shopping as a fun experience that allows them to escape from their daily life. This can be related to the high notions of uncertainty avoidance and collectivism of the Japanese culture.

5.2.3. Relation personal values and shopping values

In addition to the analyses of differences regarding personal and shopping values, the relation between these two value types was examined as well. With a Chi-square test for correlation was found that people who agree with the statements related to efficiency ("a store visit is good when it is over very quickly" [p<.05] and "the time required for shopping has a big influence on my shopping experience" [p<.1]) are more likely to hold self-actualisation value, while people who disagree more often hold social-affiliation values. People that disagree with the statement “while shopping, I am able to forget my problems” more often hold social-affiliation values, while people who agree are more likely to hold self-actualisation values (p<.05). This relation between an efficient and a problem-diversional shopping attitude and self-actualisation values is very interesting and affirms that to a certain extent a relation exists between personal values and shopping attitude.

5.2.4. Conclusion

In this paragraph the cultural values of expatriates were examined and differences between the American, British and Japanese were explored to answer research question 1. It was found that to some degree expatriates have personal and shopping values in common. They all score high on the personal values ‘fun and enjoyment and life’ and ‘warm relationships with others’, and low on ‘sense of belonging’, ‘excitement’ and ‘being well-respected’, despite certain expectations with regard to differentiation of cultural values based on the literature review. Moreover, on average all expats score high on time-awareness and product-reliability values, and low on diversional and self-expressive values. Additionally, three underlying dimensions of shopping values were defined for the entire group of expats, namely hedonic, utilitarian and reliability-related shopping motives.

However, still some obvious differences were recorded between the Americans, British and Japanese. For example, compared to the other two groups the Japanese score high on fun and enjoyment and excitement, and exclusively have an experiential attitude towards shopping as they score high on hedonic and relatively low on utilitarian shopping values. They also score high on security and associate hedonic shopping motives with self-expressive shopping values and brand-reliability, pointing towards uncertainty avoidance and staying in line with the group. The Americans score rather low on fun and enjoyment and high on an efficient attitude towards shopping. They also score high on security and on store and product reliability. Furthermore they score high on utilitarian shopping motives. The British score relatively low on security and high on sense of belonging. Furthermore, they seem to take an interesting position in-between the Americans and Japanese: scoring high on fun and enjoyment like the Japanese and equally high on self-respect with the Americans. For shopping values they score clearly lower than the other two on product-reliability and experiential shopping values, as well as on the hedonic dimension in general. And even though no significant differences for social-affiliation and self-actualisation values across the three cultures were found in this study, the relatively high scores of the American and British expatriates on the utilitarian shopping dimension, does suggest that there might be a link between self-actualisation values, an efficient shopping attitude and more individualistic and time-oriented (Western) cultures. Apart from ethnicity, differences in age and occupation might also play a role in the differences in value orientation between the three cultures.

5.3. Shopping behaviour

In this section the shopping behaviour of expatriates in general and of American, British and Japanese expatriates in specific will be explored in order to answer research question 2. The main input are the survey questions on 12-month penetration (Q1), favourite shopping venue (Q2 and Q3), visit frequency (Q10), time of visit (Q5), customer motivation (Q6 and Q7), favourite retailers and brands, and use of media (Q9). Insight will be gained as well in which products expatriates cannot find in the Netherlands (Q13) (see Annex 8). The results will be compared to findings from previous studies by Strabo among Dutch consumers in the catchment area of Stadshart Amstelveen as well.

5.3.1. Shopping behaviour of expatriates

Penetration

Respondents were Respondents were asked to indicate which shopping venues they visited in the last 12 months. It was not investigated how often each of these centres were visited. The penetration, i.e. the percentage of people that has visited the shopping centre at least once during a period of 12 months, is displayed by catchment area in table 5.2. Both daily and non-daily penetration rates are combined in this figure. On average people visited one of the listed shopping venue for daily shopping and three of the listed venues for non-daily purposes over a year's time. In the primary catchment area Stadshart Amstelveen has a 98% penetration, where Amsterdam city centre is second. For daily shopping the ¬main competitors of Stadshart are Gelderlandplein and the neighbourhood centres Groenhof and Kostverlorenhof (see figure 4.3). The penetration of Stadshart in the secondary and tertiary catchment area for daily shopping is much lower (18 and 16%) confirming that people tend to shop locally for daily products. For non-daily shopping trips Amsterdam city centre is the biggest competitor of Stadshart Amstelveen, followed by Gelderlandplein, Amsterdam Zuid and PC Hooftstraat. Compared to Gelderlandplein relatively a lot of people with young children (< 10 years) visit Stadshart for non-daily shopping trips. Compared to Amsterdam city centre, Stadshart has a relatively low penetration of two-person households. Amsterdam city centre and PC Hooftstraat and around are relatively often visited by people between 45 and 54 years old.

Among the Japanese, Gelderlandplein has the highest penetration for daily shopping, followed by Stadshart and Kostverlorenhof. For non-daily shopping Amsterdam city centre has the highest penetration, followed by Stadshart and Gelderlandplein. The high penetration of Gelderlandplein (88%) and Kostverlorenhof (59%) by the Japanese can be explained by the presence of several Japanese stores. The fact the Japanese live closer to these centres than the British and Americans might play a role as well, but does not seem to explain the huge differences in penetration between cultures. To illustrate, the British respondents who are also concentrated in the north of Amstelveen only reach a penetration of 37% and 19%, respectively. The British do have a 100% penetration of Amsterdam city centre followed by Stadshart (70%), Amsterdam Zuid (70%) and PC Hooftstraat (63%). Their penetration of Amsterdam city centre, Amsterdam Zuid and PC Hooftstraat is clearly higher than that of the Japanese and Americans. Among the Americans both Amsterdam city centre and Stadshart have an equally high penetration rate of 75%.

TABLE 5.2 – PENETRATION BY CATCHMENT AREA (both daily and non-daily)

	primary catchment area	secondary catchment area	tertiary catchment area	Percent total
Amsterdam city centre	70%	84%	100%	77%
Amsterdam Zuid	48%	62%	32%	47%
PC Hooftstraat	37%	65%	27%	41%
Gelderlandplein	70%	57%	18%	56%
Stadshart Amstelveen	**98%**	**73%**	**45%**	**78%**
Hoofddorp city centre	13%	19%	0%	12%
Kostverlorenhof	40%	22%	9%	28%
Groenhof	51%	22%	5%	32%
Middenhoven	17%	14%	0%	13%
Westwijk	27%	19%	5%	21%

TABLE 5.3 – FAVOURITE SHOPPING VENUE FOR DAILY SHOPPING BY CATCHMENT AREA

	primary catchment area	secondary catchment area	tertiary catchment area	Percent total
Amsterdam city centre	-	5%	41%	10%
Amsterdam Zuid	-	29%	5%	9%
PC Hooftstraat	-	11%	-	3%
Gelderlandplein	10%	5%	-	8%
Stadshart Amstelveen	**33%**	**-**	**5%**	**17%**
Hoofddorp city centre	-	-	-	-
Kostverlorenhof	14%	-	-	7%
Groenhof	16%	3%	-	8%
Middenhoven	5%	-	-	2%
Westwijk	8%	-	-	5%
other	14%	47%	50%	32%

TABLE 5.4 – FAVOURITE SHOPPING VENUE FOR NON-DAILY SHOPPING BY CATCHMENT AREA

	primary catchment area	**secondary catchment area**	**tertiary catchment area**	**Percent total**
Amsterdam city centre	27%	45%	64%	38%
Amsterdam Zuid	2%	5%	-	2%
PC Hooftstraat	-	8%	-	2%
Gelderlandplein	8%	8%	5%	8%
Stadshart Amstelveen	**51%**	**8%**	**-**	**27%**
Hoofddorp city centre	-	5%	-	2%
Kostverlorenhof	-	-	-	-
Groenhof	5%	-	-	2%
Middenhoven	-	-	-	-
Westwijk	-	-	-	-
other	6%	21%	18%	15%

The Japanese visited on average three different places for daily shopping which differs significantly from the penetration by the Americans and British background according to a one-way ANOVA. This could have to do with the fact that they can find less substitutes for specific products from home in regular supermarkets compared to British and Americans and therefore visit more different places, but might also be due to the fact that the list of shopping venues respondents could choose from mainly included venues in the primary catchment area and no local venues or supermarkets.

Favourite shopping venue

People were asked to indicate their favourite shopping venue for both daily and non-daily shopping trips. The results are shown in table 5.3 and 5.4, respectively. In the primary catchment area Stadshart is the favourite destination for the majority of the people. For non-daily shopping trips the centre of Amsterdam is the most popular in the secondary and tertiary catchment area. For daily shopping people rather shop locally, since half of the respondents indicated to prefer a shopping venue that was not listed such as a specific supermarket. In general, households with children under the age of 10 have a preference for Stadshart, while one- and two-person households prefer Amsterdam city centre. The differences that exist between cultures can be ascribed to the unequal distribution of the cultural groups over the catchment area.

Visit frequency

The visit frequency of respondents was enquired for both daily and non-daily shopping trips (table 5.5). Approximately 60% of the respondents shop daily or 3 to 5 times a week for daily products, and 83% shop more than once a month for non-daily products at their favourite shopping venue. On average expats make 3.3 daily shopping trips a week and 6.1 non-daily shopping trips a months. Interesting to note is that the majority goes on a non-daily shopping trip between once a week and once a month, but 23% respondents does this more than twice a week. The visit frequency for daily products at Stadshart varies quite a lot, but the majority of the people from the primary catchment area visits the centre once a week or more: on average 1.9 times a week. These frequent shoppers are mainly families with children. The frequency of non-daily shopping trips to Stadshart lies between once a week and once a month and is clearly higher for respondents from the close vicinity: 5.1 times a month on average. In the primary catchment area approximately all respondents indicate to visit Stadshart. In the secondary area 32% indicates not to ever visit the centre; in the tertiary catchment area this figure is 46%. The differences in visit frequency to Stadshart Amstelveen are probably mainly the result of the respondents' place of residence, so those who live further away visit less often. There are in any case no significant differences between the three cultures.

Customer motivation and customer blocks

Visitors of Stadshart Amstelveen were asked to indicate their usual motivation to visit Stadshart Amstelveen. It appears that they mainly visit Stadshart to make a specific purchase, to look around, and for funshopping. Re-

TABLE 5.5 – VISIT FREQUENCY

	daily		non-daily	
	in favorite shopping venue	**at Stadshart Amstelveen**	**in favorite shopping venue**	**at Stadshart Amstelveen**
daily	11%	9%	11%	9%
3-5 times a week	49%	8%	5%	2%
twice a week	26%	10%	8%	4%
once a week	9%	8%	23%	11%
once in 2 weeks	2%	11%	22%	14%
once a month	1%	8%	17%	16%
less often	2%	20%	13%	21%
never		21%		21%
frequency	**3.3 / week**	**1.3 / week**	**6.1 / month**	**4.1 / month**

spondents from the primary catchment area visit the supermarket and make use of specific services at the centre as well. Differences in customer motivation across the three cultural groups were tested for significance with Chi-square. It appeared that British visited Stadshart more often to use a specific service and to visit a leisure facility than the Americans and Japanese, and more often to look around than the Japanese. The differences between the British and Japanese are especially remarkable because there are less British than Japanese from the primary catchment among the respondents. An explanation could be that the language makes the use of leisure facilities and services hard for them. The market is named several times as a motivation to visit Stadshart Amstelveen as well. Distance is named the most frequently as a reason not to visit. Other reasons were a same or better offer locally, or being unfamiliar with it.

Time of visit

Visitors of Stadshart Amstelveen were also asked to indicate the moments during which they usually visit the centre. The most popular time to visit Stadshart Amstelveen appears to be the weekend, but the Tuesday and Friday market and weekday afternoons are popular as well. Respondents from the primary catchment area mainly visit during the weekends and on market days. Differences per cultural group are tested using Chi-square. The British visit relatively infrequently during weekday afternoons compared to the Americans and Japanese, and relatively often during weekends compared to the Japanese. The Japanese visit the centre relatively often in combination with the Tuesday and Friday market ($p<.05$ with Americans / $p<.1$ with British). The differences in daily occupation between the cultural groups are presumably the explanation. The Japanese however, might also visit the market more often because of their preference of fresh products.

TABLE 5.6 – FAVOURITE RETAILERS

	At favourite shopping venue	At Stadshart Amstelveen
Food	AH (52%), Dirk (9%)	AH (46%), market
Personal care	Etos (28%), Kruidvat, AH, HEMA	Etos (14%), AH
Clothing	Bijenkorf (10%), V&D, H&M, Esprit	Bijenkorf (20%), H&M, V&D
Books and media	English book store (19%), Japan Bookshop, online	Bijenkorf (7%)
Home ware	Blokker (20%), IKEA, HEMA, Bijenkorf	Bijenkorf (14%), Blokker, V&D, HEMA

Favourite retailers and brands

Respondents were asked to indicate their favourite point of purchase in their favourite shopping venue and in Stadshart Amstelveen. An overview of the favourite retailers of the respondents per sector is provided in table 5.6. Remarkable is that AH is tremendously popular among expats and that the Bijenkorf is clearly a favourite destination at Stadshart. Books are in general bought in a specialty store or online. Respondents were also asked to name their three favourite fashion brands, resulting in a variety of 180 different brands from all over the world. The ten that were named the most frequently (> five times) were H&M, GAP, Esprit, UNIQLO, ZARA, Victoria's Secret, Marks & Spencer, Diesel, Nike, and Tommy Hilfiger. La Place is the most named favourite catering facility, followed by several specific (ethnic) restaurants or cafes. The visitors of Stadshart Amstelveen also named McDonald's (9%) and Popov (8%) relatively often. The data are too heterogeneous to give details per catchment area or cultural group.

Missed products

The respondents were asked to indicate if there were products from their country-of-origin that they could not find in regular Dutch stores and therefore bought elsewhere. In the category food, respondents came up with a great variety of very specific products and brands. 14% of the people indicated to miss various foods from their home country or even too many to list, while 35% indicated not to miss anything. Remarkable is that baking products are mentioned the most often as missing, together with cereal, tea, cheese and rice. In the category personal care, respondents mainly missed skin care products, cosmetics and hair products, mostly from specific brands. The same applies to clothing, but people also indicated not to be able to find the right sizes (either small or large), underwear and designer clothes. Some of them mention the high prices of clothing compared to home as well. Furthermore, 24% of the respondents indicated to miss books in either English or a specific language. Other missed items were magazines, DVD's and CD's. In the categories personal care, clothing and books and media approximately 60-65% of the respondents does not miss anything. With regard to home ware products 89% does not miss anything. In this category several home decorating stores were mentioned, as well as some very specific product such as an egg poacher pan, gift bags and toilet seat covers although no specific items in general. The results do not indicate that there are differences between cultures or that people with a stronger cultural identification miss more products.

Respondents indicated to have different points of purchase for the products they cannot find. Most frequently these products are bought online (32%), brought from home by themselves or via friends or family (29%), bought in ethnic stores (26%) or abroad (6%). Food is mainly bought at expat stores or brought from home. Books and media are mainly bought online. Clothing and personal care products are mostly brought from home, but also ordered online. In addition, a large number of people indicated to buy items from a specific brand without mentioning if they order these online or bring them from home.

Use of media

One of the questions comprehended the use of sources by expats in their everyday life in the Netherlands for news, events and promotions. Internet (90%) is the most used source among expats, followed by international media (69%), door-to-door advertisement leaflets (57%) and free local papers and weeklies (50%). Regular Dutch media only ranks fifth place. Across the entire catchment area the use of information sources seems to be rather even; only the use of international media is relatively higher in the secondary catchment area. However, between the Japanese on the one hand and the Americans and British on the other hand are definitely some significant differences. The Japanese for example use less international media ($p<.001$), and more door-to-door advertisements. The British also use more local media than the Japanese. The American and British have a rather similar pattern in their exploitation of information sources. A reason for the high use of door-to-door advertisements by the Japanese could be that most of them are housewives who have the time to go through them. A reason for their limited use of international media might be that these sources are mainly in English; therefore the Japanese are probably more focused on the internet than the other groups.

5.3.2. Comparison with the Dutch

To gain insight in the differences in shopping behaviour between expatriates and Dutch consumers the collected data has been compared to the outcomes of four existing studies by Strabo on Stadshart Amstelveen. The first one is the visitors survey 2008 that was held among 871 visitors of Stadshart Amstelveen. The second is the purchase flow survey 2008; a phone based survey among 400 households from Amstelveen and 700 in Amsterdam Zuid, Aalsmeer, Uithoorn, Hoofddorp, Badhoevedorp and Ouder-Amstel. The untapped market analysis 2009 was a written survey among1.800 consumers in Diemen, Amsterdam-Zuid, Amsterdam-Sloten and Badhoevedorp. The market analysis 2010 was conducted among a total of 1.200 households: 400 in each 10-minute catchment area.

Penetration

From the 2010 market analysis by Strabo followed that Stadshart Amstelveen has a penetration of 98% in the primary, 60% in the secondary and 35% in the tertiary catchment area. In the primary catchment area the biggest competitors are Gelderlandplein and Amsterdam city centre. In the secondary catchment area Amsterdam city centre has the highest penetration rate (78%). Above average established families and empty nesters have a relatively high penetration in the secondary catchment area, and pre-family households a relatively low penetration. The levels of penetration by the Dutch are rather equivalent to those that were found for expatriates. Just as came forward from the 2010 market analysis, among expats also relatively a lot of households with children visit Stadshart, while two-person households prefer Amsterdam city centre.

Favourite shopping venue

In the 2010 market analysis, Stadshart Amstelveen was the favourite shopping centre in the primary catchment area (85%) and Amsterdam city centre in the secondary catchment area (35%). Predominantly families with an above average income and empty nesters have a preference for Stadshart. A similar pattern is visible for expats: in the primary catchment area they also have preference for Stadshart, but in the secondary catchment area Amsterdam city centre clearly takes the lead. In accordance with the Dutch, households with children under the age of 10 prefer Stadshart, while one- and two-person households prefer Amsterdam city centre.

Visit frequency

In the 2008 purchase flow survey was found that 76% of the respondents shop more than once week, and that almost half of these people shop daily or 3 to 5 times a week. The average shopping frequency is 2.5 times a week. People from Amstelveen visit Stadshart on average 1.3 times a week, and 57% visits the centre more than once a week. People from the region clearly visit less often; almost half even indicates never to visit the centre. The average visit frequency of Stadshart in the primary catchment area according to the 2010 market analysis was similar to the number found in the purchase flow survey. From the 2008 visitors survey by Strabo appeared that the average visit frequency of Stadshart Amstelveen is 2.4 times a week.

Compared to the Dutch, expatriates make more shopping trips on average: 3.3 per week for daily shopping and 1.4 per week for non-daily shopping. The visit frequency of expatriates to Stadshart in the primary catchment area (1.3 visits a week for daily shopping and 0.9 visits a week for non-daily shopping) is approximately equivalent with that of the Dutch with. However, the visit frequencies of expats and Dutch consumers are not completely comparable, since it is unclear if the number of shopping trips for daily and non-daily shopping should be perceived as separate shopping trips, or if they are combined trips.

Customer motivation and customer blocks

According to the 2008 visitors survey, respondents from Amstelveen visit Stadshart most frequently for fun shopping, daily shopping and frequent non-daily shopping. People from the region and elsewhere visit the centre the most for funshopping. The 2010 market analysis points out that shopping with a purchase intention is the main motivation to visit Stadshart. In the primary catchment area people also visit the centre for groceries and daily products, while looking around without a purchase intention is more popular among inhabitants of the secondary and tertiary catchment area. Customer blocks for people from the latter areas are predominantly distance, not keen on shopping, a good or better offer nearby, and the parking tariff at Stadshart.

Similar to the Dutch the most frequently mentioned motivation among expatriates to visit Stadshart is to make a specific purchase, after which looking around and funshopping are also popular. In the primary catchment area expats also visit the supermarket. The most common customer block is distance, just as among the Dutch.

Favourite retailers and brands

Albert Heijn was the most frequently mentioned food retailer in the 2010 market analysis, followed by Dirk, C1000 and Dekamarkt. The favourite clothing retailers of respondents were V&D, C&A, Bijenkorf and H&M. Also popular in Stadshart are HEMA, Jack& Jones, Miss Etam, M&S, Men at Work, and Björn Borg. For domestic appliances these were BCC, Blokker, Mediamarkt, and Expert. With regard to media several (national) book shops and chains were mentioned. In case Dutch consumers had a preference for a specific catering facility they mostly indicated LaPlace and BLVD as their favourite spot. From the untapped market study in 2009 also followed that Bijenkorf, H&M, C&A and V&D were the most popular retailers at Stadshart. For catering facilities 29% of the Dutch indicates La Place as favourite. In general the top-10 of favourite clothing retailers was as follows: Bijenkorf, H&M, C&A, V&D, Esprit, Claudia Sträter, Modehuis Blok, WE, ZARA, and HEMA.

The retailers that are favourite among expatriates are rather similar to those that are popular among the Dutch. Different is that AH is extremely popular among expats, while C&A is not, and that the Bijenkorf is a favourite destination at Stadshart in multiple sectors. The shares of expatriates that mention one of the dominant retailers as their favourite are lower though than among the Dutch. With regard to favourite clothing retailers expats have a greater preference for well-known international brands, while the Dutch are more locally oriented: only H&M, Esprit and ZARA had a place in both top-10s.

5.3.3. Conclusion

In this paragraph the shopping behaviour of expatriates in general and of the three cultural groups was discussed based on the results from the questionnaire in order to answer research question 2. The outcomes were compared to existing findings on the shopping behaviour of Dutch consumers within the catchment area as well.

With regard to penetration, favourite shopping venue and competition there are no obvious differences with the Dutch: expats primarily shop locally for daily products as well and Amsterdam city centre is the biggest competitor of Stadshart. Despite some differences between cultures, the distance to the shopping centre seems to be the most determining factor in visiting behaviour, as well as household structure and age. The only difference related to culture is that the Japanese seem to visit Gelderlandplein and Kostverlorenhof more frequently because of the presence of Japanese stores. Possibly culture-related is the fact that the British visit the areas of Amsterdam Zuid and PC Hooftstraat more often than the Americans and the Japanese. This could for example be a matter of style, but for now does not have an explanation. The Japanese also seem to visit a greater variety of places for daily shopping; maybe because unlike the British and Americans, substitutes for specific products from their home-country can not be found in a regular Dutch supermarket which forces them to visit a Japanese or Asian specialty store.

The visit frequency of expatriates does not vary with culture, but is higher than that of the Dutch consumer, both for daily and non-daily shopping trips. Expatriates on average make 3.3 shopping trips per week for daily shopping and 1.4 per week for non-daily shopping, compared to 2.5 shopping trips a week by the Dutch. Besides, almost a quarter of the expats makes more than two non-daily shopping trips a week. The frequency of visits to Stadshart by expats in the primary catchment area is in any case not lower than that of Dutch consumers, and presumably even a bit higher.

The differences related to customer motivation are mostly explained by place of residence as well; therefore distance is most mentioned customer block. Locals also visit Stadshart more often for daily needs and specific purchases services than people from elsewhere. The recorded differences between the British and Japanese with regard to visiting of leisure facilities and specific services may be related to language, forming a factor of frustration for the Japanese. The weekend is the most popular moment of visit, but the market is an important pull factor as well, especially for the Japanese. The cultural differences in time of visit of Stadshart are essentially related to place of residence and daily occupation.

With regard to favourite retailers and in comparison with Dutch consumers AH is tremendously popular among expats in contrast with C&A, and the Bijenkorf is clearly a favourite destination at Stadshart. In general expats have a greater preference for well-known international brands, while the Dutch are more oriented on national chains. In addition, a lot of expats miss specific products or brands from their country-of-origin. The majority misses specific products or brands. In the fashion segment also brands are missed, as well petite or larger clothing sizes, underwear and designer clothes. The latter three have to do with differences in body proportions, beauty ideal, and quality and style perception, and as came forward in the literature review those can definitely be related to culture and its constraints. Popular ways among expats to obtain the missed products is to buy them online, bring from home by themselves or via friends and family, or buy them in ethnic stores.

The dissimilarities between cultures in media use are probably mainly related to language. This explains why expats use the internet and international media as their most important source of information. The high use of door-to-door advertisements by the Japanese probably has to do with the occupation, i.e. the high share of housewives among them. Interestingly, despite the language door-to-door advertisement and free local papers and weeklies seem to be an important source of information for expats as well, just as for Dutch consumers.

All in all, shopping behaviour of expatriates is rather similar to that of the Dutch, except for visit frequency. The behavioural differences across cultures mainly have to do with other factors than ethnicity such as the differences in place of residence, household type, age and daily occupation. Necessary to say though is that these factors are culture-related to a certain extent as well. The Japanese for example prefer Amstelveen and Buitenveldert above Amsterdam city centre as a place of residence because of the special facilities for Japanese such as schools and stores and the closeness of other Japanese expats. The British and Americans for whom the education of children and being 'in-group' is less crucial than for the Japanese, such issues are not necessarily leading in their location choice. The same applies to occupation, which can be a result of cultural constraints as well: this explains the large number of housewives among the Japanese.

5.4. Shopping centre attributes

This paragraph tries to provide an answer to research question 4 by finding out if there are differences in the evaluation behaviour of the target groups. The survey questions on importance of shopping centre attributes (Q8), satisfaction regarding shopping centre attributes in Stadshart Amstelveen (Q15 and Q16) form the main input (see Annex 8). The results are analysed for the entire group of expatriates as well as for the American, British and Japanese group. The findings are compared to existing data on Dutch consumers as well.

5.4.1. Importance of shopping centre attributes

Respondents were asked to indicate the level of importance of certain shopping centre attributes in their decision on where to shop. The scores per attribute were measured on a five-point Likert-type scale from unimportant (1) to important (5), which have been grouped into important, neither important nor unimportant and unimportant. The mean scores have also been converted to a 10-point scale to make comparison with existing data from Strabo possible. Table 5.7 provides an overview. Location and accessibility, retail mix and opening hours of stores and atmosphere of the centre are the most important according to expats. The majority also finds parking facilities important. The least important are catering facilities, facilities and services and promotions and events.

Figure 5.5 displays the scores on the items of 'importance' for each of the cultural groups. When reviewing the differences between groups by applying a one-way ANOVA some interesting things are seen. The Japanese seem to find parking more important than the British, while catering facilities and facilities and services are rather unimportant for the Americans compared to the Japanese. The Japanese also assess location and accessibility and orientation and way-finding as less important than the British.

Apart from differences in scores for each individual attribute, the total set of importance scores might also differ between groups. A factor analysis has been carried out to find out if there are underlying dimensions (see Annex 11). The following image occurs if four components are extracted:

- Component 1 attributes related to functionality and space-perception
- Component 2 attributes related to identity
- Component 3 fundamental attributes (location/accessibility, retail mix)
- Component 4 parking facilities

The mean scores that were generated per respondent for every factor during the analysis have been analysed for significant differences across cultures with a one-way ANOVA. A significant difference was found for the parking-component for the Japanese group, who have a high mean score on this dimension in contrast with both the Americans and the British ($p<.001$).

Apart from a factor analysis, separate factor analyses were carried out for each cultural group as well to see if the underlying dimensions differ per group. However, no clear patterns could be destiled from this.

TABLE 5.7 – IMPORTANCE OF SHOPPING CENTRE ATTRIBUTES FOR THE TOTAL SAMPLE

	important	neither important nor unimportant	unimportant	mean score
location / accessibility of the centre	92%	5%	3%	9.3
retail mix	81%	15%	5%	8.0
opening hours of stores	71%	20%	9%	7.9
atmosphere of the centre	62%	23%	15%	7.3
covered shopping	49%	24%	28%	6.9
service by personnel	42%	35%	23%	6.6
design of the centre and public space	41%	32%	27%	6.3
fashion and trend sensitivity	43%	27%	30%	6.1
orientation and way-finding	42%	23%	35%	6.0
parking facilities	54%	10%	36%	6.0
personal space and privacy	30%	31%	39%	5.8
promotions and events	29%	25%	46%	5.1
facilities and services	31%	22%	48%	4.2
catering facilities	21%	23%	57%	3.6

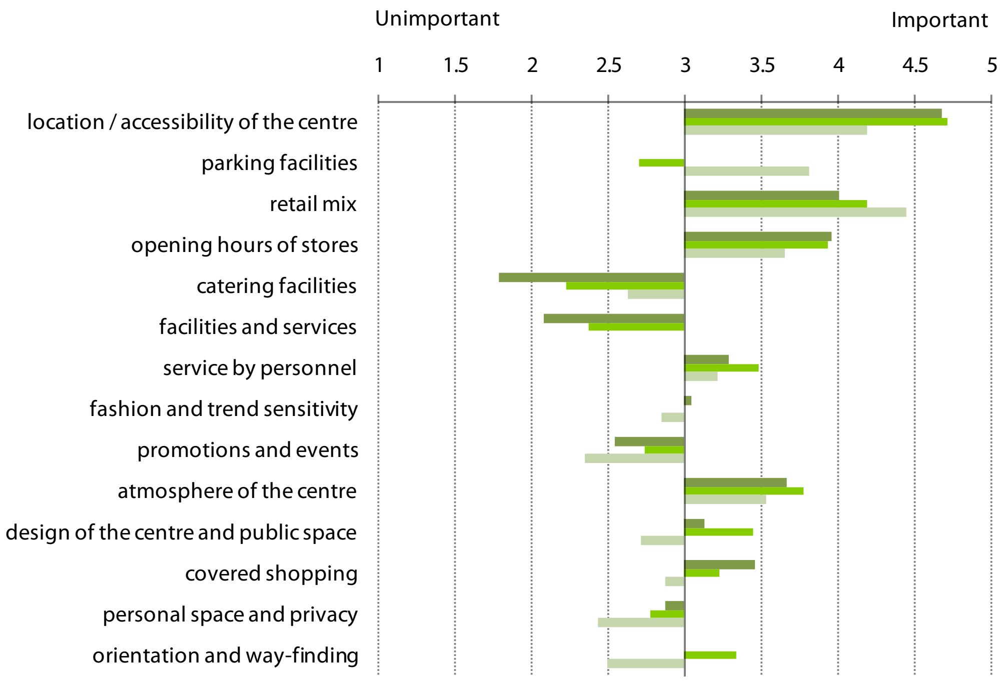


FIGURE 5.5 – IMPORTANCE OF SHOPPING CENTRE ATTRIBUTES PER CULTURAL GROUP

5.4.2. Satisfaction regarding Stadshart Amstelveen

Respondents were asked to indicate to what extent they were satisfied with each item of a list of attributes at Stadshart Amstelveen. The scores per attribute were measured on a five-point Likert-type scale from completely unsatisfied (1) to completely satisfied (5). The scores have been grouped into satisfied, neither satisfied nor un-satisfied and unsatisfied, and the mean scores have been converted to a 10-point scale to make comparison with existing data from Strabo possible. Table 5.8 provides an overview. The analysis takes into account all 105 cases (79%) that indicated to visit Stadshart Amstelveen. On the whole, the outcomes of the evaluation of Stadshart are rather even. Location and covered shopping were assessed the most positive, and service by personnel and facilities and services the most negative. The latter two items were also evaluated as unsatisfactory the most, together with catering facilities and opening hours of stores. Respondents were the least satisfied with facilities and services, service by personnel, promotions and events, catering facilities and fashion and trend sensitivity.

TABLE 5.8 – SATISFACTION REGARDING SHOPPING CENTRE ATTRIBUTES FOR THE TOTAL SAMPLE

	satisfactory	neither satisfactory nor unsatisfactory	unsatisfactory	mean score
location / accessibility of the centre	79%	13%	8%	8.4
covered shopping	68%	25%	8%	7.7
atmosphere of the centre	57%	31%	12%	7.2
design of the centre and public space	52%	31%	16%	7.0
parking facilities	48%	31%	21%	7.0
orientation and way-finding	47%	34%	18%	6.8
retail mix	50%	30%	21%	6.7
personal space and privacy	38%	44%	18%	6.5
overall level of satisfaction	58%	22%	14%	6.5
promotions and events	29%	53%	18%	6.3
fashion and trend sensitivity	31%	49%	20%	6.3
opening hours of stores	42%	30%	29%	6.3
catering facilities	31%	39%	31%	6.0
service by personnel	22%	46%	32%	5.7
facilities and services	22%	45%	33%	5.7

FIGURE 5.8 – DIFFERENCE BETWEEN IMPORTANCE AND SATISFACTION FOR THE TOTAL SAMPLE

A negative discrepancy exists between importance and satisfaction for location and accessibility, retail mix, opening hours, and service by personnel (see figure 5.8). A positive discrepancy exists for covered shopping, design of the centre and public space, orientation and way-finding and parking facilities. There are no correlations between the level of importance of attributes and the satisfaction regarding those. However, there are correlations between the factor scores of importance and satisfaction. Those were tested with Pearson's r. It appeared that there were correlations between the identity-components of both importance and satisfaction and between the fundamental-component of importance and the functionality-component of satisfaction.

Remarkable in the comparison of the attribute means per cultural group (figure 5.6 and 5.7) is that the British seem to be slightly more positive in general than the other two groups, and specifically on opening hours of stores, and orientation and way-finding. A one-way ANOVA was carried out to determine the significant differences per attribute. The first finding was confirmed by the mark that reflects the overall level of satisfaction of the respondents, which is shows a significant at p<.1 between the British and the Japanese. Moreover, significant differences exist for orientation and way-finding between the American and British group, and for opening hours between the British and Japanese group. An explanation for the general positive attitude of the British, and opening hours and orientation and way-finding in specific, could be that Stadshart and Dutch shopping centres and the retail structure in general are not so different from the situation in the UK. For the Americans and Japanese the differences are bigger, which causes them to be more negative.

Apart from differences in scores for each individual attribute, the total set of importance scores might also differ between groups. A factor analysis has been carried out to find out if there are underlying dimensions (see Annex 11). The following image occurs if four components are extracted:

- Component 1 attributes related to identity
- Component 2 attributes related to space perception
- Component 3 attributes related to functionality
- Component 4 fundamental attributes (location/accessibility, parking facilities and retail mix)

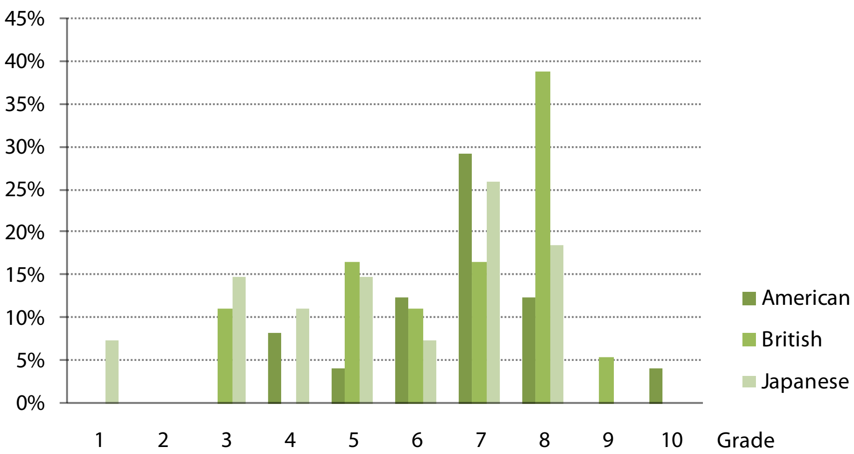


FIGURE 5.6 – TOTAL SATISFACTION PER CULTURAL GROUP

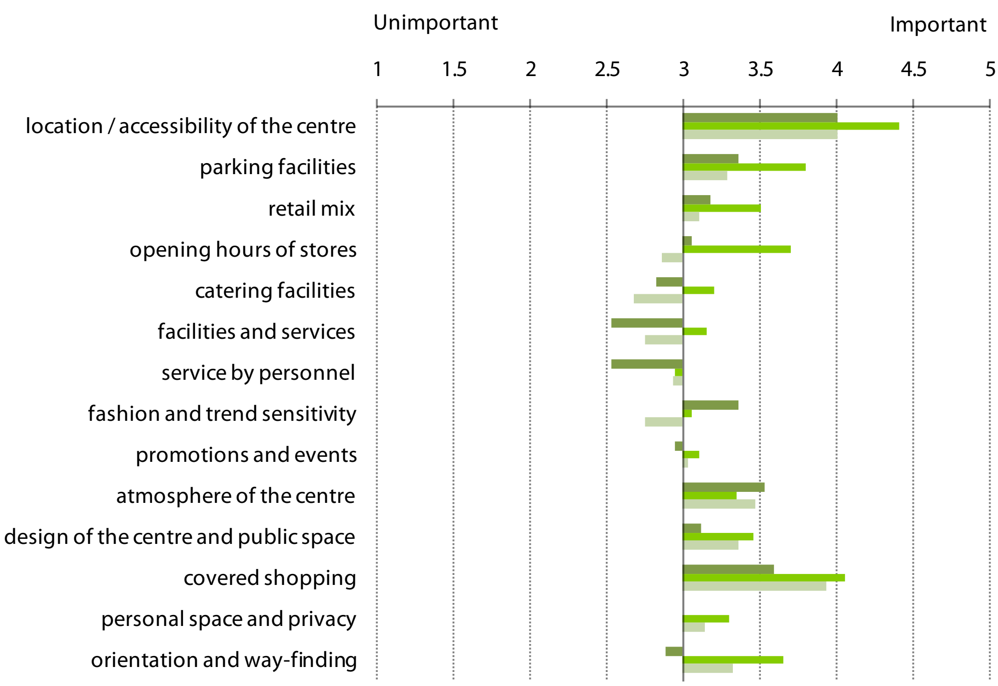


FIGURE 5.7 – SATISFACTION REGARDING SHOPPING CENTRE ATTRIBUTES PER CULTURAL GROUP

A clear difference with the factor analysis of importance-variables is that the attributes related to space perception are a separate factor with regard to satisfaction, while they were associated with functional attributes when it concerned importance. With a one-way ANOVA of the mean scores of the factor analysis per case no significant differences were found.

Just like for the set of 'importance' variables, a separate factor analysis has been executed for each of the cultural groups to find out if the underlying components differ. Again the first component of the Americans includes 9 out of 14 attributes, while this component contains only 7 attributes for the British and Japanese. Secondly, the British and Americans associate spatial aspects with other attributes, while for the Japanese it seems to be a standalone factor. The same applies to facilities and services. Remarkable is also that the functional attributes retail mix, opening hours and catering facilities are not related with each other for the Japanese; they all belong to different components. For the British and Americans they belong to the same component. Finally, for the Americans location and parking are related to orientation and way-finding, while for the British these two attributes are related with the design and atmosphere of the centre.

Missing retailers and facilities

All the open answers to the three questions 'missing shops', 'missing facilities' 'recommendations' and 'remarks' were reviewed and placed under the right category. Repeated answers per case were deleted. Approximately 24% does not miss any retailers. The most frequently named as missing retailers were within the sectors fashion, food and gastronomy (see figure 5.9). The respondents mainly asked for specific international brands (28%) e.g. GAP and ZARA, more fashionable and stylish fashion store (13%), an increased offer for children of various ages (11%) and unique and local (specialty) stores (10%). In the food sector an ethnic (expat) store is missed (14%) and specialty food or delicatessen stores (11%). Other stores that people miss are an (English) book store and an electronics shop (especially now BCC has left). In the gastronomy sector respondents mainly wish for restaurants targeting a specific consumer segment or with a specific concept (e.g. family-oriented, healthy food, Japanese food, quick lunch, ladies lunch, etc.). They also ask for more restaurants in general and a coffee bar.

A summary of the facilities that respondents would like to change is shown in figure 5.10. Primarily those are toilets and parking facilities (both 21%). In the first place they ask for more and cleaner public toilets that are free of charge, and secondly for parking that is free, cheaper or connected to a discount system. Other facilities that people wish for are extended opening hours both during weekdays and weekends, a children's playground area, and various wellness and leisure facilities. A few people also indicate to miss the post office that was closed. Other remarks were improved service by personnel (5%), more information in English (3%), and increased child-friendliness (3%). Approximately 63% does not miss any facilities.

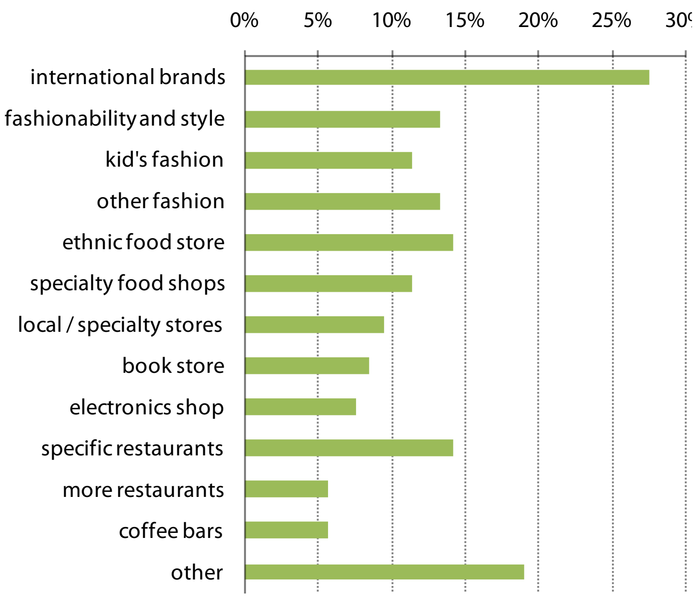


FIGURE 5.9 – MISSING RETAILERS

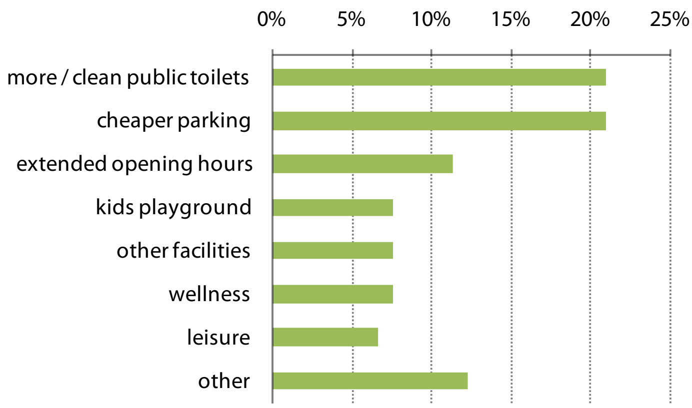


FIGURE 5.10 – MISSING FACILITIES

The most frequently mentioned were extended opening hours (78%) and a special expat supermarket (72%). The Japanese indicate more frequently that they want to make use of the convenience store and the Americans of the extended opening hours.

5.4.3. Comparison with the Dutch

Importance

In the 2009 study of the untapped market of Stadshart Amstelveen respondents were asked to indicate the importance of a number of attributes when buying clothing and shoes. If we compare these results with the assessment of importance of attributes by expats it appears that there are especially large differences in the number of people that find accessibility, service by personnel and covered shopping important. The most striking difference is that 83% of the Dutch assess service by personnel as important, against only 42% of the expats while they are more negative about this item. Covered shopping is important for half of the expats, while only one-third of the Dutch have a similar opinion. Furthermore 67% of the Dutch evaluates accessibility as important. A much larger number of expats (92%) seems to find this item important, but in the survey accessibility and location were combined to form one aspect which might explain the high percentage. In the 2008 purchase flow survey location also appeared to be the most important reason for the choice of shopping venue; 75% of the respondents assessed this attribute as important.

Satisfaction

In all four studies that Strabo has conducted on Stadshart Amstelveen for Unibail-Rodamco the appreciation of respondents was measured. The level of satisfaction of expatriates is compared to these results in table 5.9. Firstly, expatriates seem to have a more negative impression in general than the Dutch: the number of expats that evaluate an attribute as 'satisfactory' is clearly lower for all attributes including the total impression of the centre. Their grade indicating the total level of satisfaction is a 6.5 on average, compared to a 7.1 and 7.6 by the Dutch in the 2008 purchase flow study and 2008 visitors survey, respectively. Other aspects that expats noticeably assess more negative are service, fashion and trend sensitivity, catering facilities and retail mix/choice of shops. Attributes that they evaluate more positive are parking facilities and accessibility. The high score on accessibility might be due to the combination of accessibility and location into one attributes in the expat survey. The high score of expats on parking facilities is rather odd since this is one of the items they would like to see altered.

TABLE 5.9 – COMPARISON OF SATISFACTION OF EXPATRIATES WITH SATISFACTION OF DUTCH CONSUMERS

	Mean grade on 10-point scale					% of respondents that graded the item as good or satisfactory*		
	Expat survey	Market analysis 2010	Untapped market 2009	Purchase flow 2008	Visitors survey 2008	Expat survey	Purchase flow 2008	Visitors survey 2008
Total impression	**6.5**	-	-	7.1	7.6	**58%**	87%	
Accessibility	**8.4**	7.7	7.3	7.2	7.9	**79%**	86%	91%
Parking	**7.0**	-	5.8	6.0	7.0	**48%**	62%	70%
Retail mix (choice)	**6.7**	7.4	7.6	7.3	7.4	**50%**	89%	78%
Catering facilities	**6.0**	6.8	-	7.0	7.2	**31%**	68%	78%
Service by personnel	**5.7**	-	7.1	-	-	**22%**	-	-
Fashion and trend	**6.3**	-	7.5	-	-	**31%**	-	-
Promotions and events	**6.3**	-	6.5	-	-	**29%**	-	-
Atmosphere	**7.2**	7.1	7.4	6.9	7.3	**57%**	75%	79%
Design of the public space	**7.0**	-	-	6.9	-	**52%**	74%	-
Climate and temperature	**7.7**	-	-	-	7.4	**68%**	-	81%

* 7 to 10 on a 10-point scale

Missing retailers and facilities

In the 2010 market analyses 40% of the people in the first catchment area missed one or more retailers in Stadshart. ZARA (2%) and Action (1%) are specific retailers that are missed the most, apart from 9% who misses catering facilities. In general more choice in fashion is desired, such as specialty stores, fashionable clothes for older women and luxury fashion stores. Brands like Hilfiger, America Today and Armani are mentioned specifically. The main strengths of the centre are choice and quality of the shops, complete offer, location and being covered. Parking tariff and ambiance are, also in comparison with the competition, the biggest weaknesses. From the 2008 purchase flow survey followed that the most frequently missed retailers are cheaper stores, a Do It Yourself-store, shoe shops, boutiques, more variation in offer, a furniture store, fashion for elderly, a Bristol, a gift shop, and stores for kids clothing. 66% of the visitors doesn't miss anything. Other recommendations with regard to Stadshart were cheaper parking (7%), atmosphere (3%) and more greenery (2%). In the 2008 visitors survey, apart from various clothing stores (14%), various food stores (14%) and gastronomy (9%) people mainly miss a supermarket, cheap clothing, a furniture shop, facilities, shoe stores, electronics, better quality and more luxurious stores, more atmosphere, and sports stores. 56% of the respondents doesn't miss anything. Strong attributes of the centre are covered shopping, atmosphere, completeness of the shop offer, accessibility. Inhabitants from Amstelveen also appreciate the location. Weaker points are the parking tariff, an uninviting atmosphere, and not enough diversity in the retail mix (especially too much offer for women and not enough in the more affordable segment).

Compared to the Dutch, expats are more focused on international brands, fashionable and stylish clothes, offer for children, and unique and local (specialty) stores. However, results of the 2010 market analysis among the Dutch pointed to some extent in the same direction as well. Regarding food, expats are more focused on ethnic store and specialty food shops. Parking facilities are perceived as expensive by both, while a larger share of expats seem to be dissatisfied with this item. On toilets expats are clearly more negative. Among expats there is also strong demand for extended opening hours; 78% of the visitors indicated to make use of that, compared to 30-35% of the Dutch consumers in the primary catchment area.

5.4.4. Conclusion

The evaluation of shopping centre attributes by expatriates was the subject of this section. The conclusion will concentrate on the similarities and differences between expats in general, the groups of American, British and Japanese expats, and the Dutch consumers in the catchment area of Stadshart Amstelveen in order to answer research question 4.

The evaluation of attributes with regard to importance is not so different from that of the Dutch. The main underlying dimensions for importance and satisfaction are, apart from a more or less fundamental dimension, functionality, identity, and space-perception. For expatriates location and accessibility, retail mix, opening hours of stores and atmosphere of the shopping centre are the most important attributes in their decision where to shop, while catering facilities, and facilities and services are less important. With regard to appreciation expatriates see the location and accessibility of Stadshart and the fact that it is covered as its strongest features just as the Dutch. The latter is especially positive with regard to expats since this item is more important for them than for Dutch consumers. Remarkable is that expatriates in general do seem to have a more negative impression of Stadshart. Also, in relation to importance and compared to the Dutch consumers the weakest aspects of the centre are retail mix, opening hours, service by personnel, fashion and trend sensitivity and catering facilities. The negative assessment of facilities and services is almost certainly related to the toilet facilities, which was most frequently indicated as a missing facility together with cheaper parking and extended opening hours, both during weekdays and weekends. Remarkably, parking facilities were evaluated rather positive compared to the Dutch. Retailers that are missed by expats at Stadshart are more international brands, a more fashionable and stylish offer, a greater focus on children in offer and facilities, and more unique and local (specialty) stores. Furthermore, an ethnic store or expat supermarket is missed as well as specialty food stores, and restaurants that target a specific consumer segment or with a specific concept.

With regard to differences between the cultural groups it is interesting to see that there are some distinctions between cultures on the level of importance, but that the assessment of Stadshart Amstelveen is rather similar for the entire sample. This underpins the idea that expats have a similar reference frame because of their lifestyle. The differences that do appear are mostly related to cultural constraints. For example, for the Japanese with regard to importance of attributes two dimensions can be distinguished that are both primarily related to identity. This might have to do with their high experiential shopping values and high scores on hedonic shopping. The great importance of parking facilities for the Japanese could be clarified by the fact that they feel to be more dependent on the car for shopping in the Netherlands, because of the lack of delivery services and the limited opening hours here. While one would expect Americans and British to find this attribute more important, they are probably that much used to shopping by car that they take this facility for granted. An explanation for the positive attitude of the British towards Stadshart Amstelveen could be that this centre and some characteristics of the Dutch retail structure (including opening hours and orientation and way-finding) are not so different from the situation in the UK. For the Americans and Japanese the differences are bigger, which causes them to be more negative.

So generally speaking, the importance of shopping centre attributes differs across cultures, but the differences in satisfaction are maybe not that large as expected. However, the satisfaction with Stadshart Amstelveen does clearly differ between expatriates and Dutch consumers. The differences with the Dutch are probably mainly related to lifestyle, while the differences between cultures are most likely to depend on cultural constraints .

5.5. Interrelations between concepts

In the previous section the three variables cultural values, shopping behaviour and evaluation of shopping centre attributes were analysed for the entire group of expatriates on the one hand, and for differences per cultural group on the other hand. However, the conceptual model also implies certain interrelations between the concepts. In this paragraph the results of several tests of correlations will be discussed in order to answer the research questions 3, 5 and 6. Unfortunately, correlations between the variables per cultural group can not be identified due to the limited sample size.

5.5.1. Relation cultural values and shopping behaviour

First of all we will investigate the relation between cultural values and the shopping behaviour of expatriates (research question 3). This is done by testing for correlations with Spearman's ρ and Kendall's tau. The test is performed for both personal values and shopping values in relation to visit frequency as the main manifestation of shopping behaviour. In order to meet some of the statistical preconditions the variable 'personal values' was recoded first into social affiliation and self-actualisation values according to Shim & Eastlick (1998). The response scale of the set 'shopping values' was transformed into three categories: agree, disagree and neither agree nor disagree. The variable 'visit frequency' was recoded in three ways: for daily shopping into very frequent (daily – 3 to 5 times a week) and less frequent, for non-daily shopping into very frequent (daily – once a week) and less frequent, and for non-daily shopping as well into frequent (daily – once a month) and infrequent.

However, for personal values no correlations were found with visit frequency. Between shopping values and visit frequency though, two interesting correlations appeared with $p<.01$. First of all people that disagree with the statements "Shopping trips are truly a joy" (experiential 1), "Shopping trips truly feel like an escape" (diversional 1) and "While shopping, I am able to forget my problems" (diversional 2) tend to shop very frequently (more than 3 to 5 times a week) for daily products, while those who agree clearly do less daily shopping. At $p<.5$ there was also a correlation between confirmation of the statement "Shopping trips truly feel like an escape" and making non-daily shopping trips very frequently (once a week or more). These outcomes are interesting, because no significant differences were found between cultures on visit frequency before. These findings implicate that, although not related to ethnicity, there is a relation between visit frequency and cultural values.

5.5.2. Relation evaluation of shopping centre attributes and shopping behaviour

The second relation to be investigated is between the evaluation of shopping centre attributes and the shopping behaviour of expatriates in order to answer research question 5. The response scale of the variable set 'importance' was recoded from a 5- to a 3-point scale of important, unimportant and neither important nor unimportant. The set of items concerning satisfaction were recoded in a similar way. The correlations were investigated with Spearman's ρ and Kendall's tau.

Importance of shopping centre attributes

The tests showed that people that shop less than once a month for non-daily products indicate fashion and trend sensitivity more frequently as important in their choice of shopping centres, and that those who evaluate covered shopping as an important attribute generally make a non-daily shopping trip at Stadshart more than once a month. An explanation could be that those who shop less frequently have less buying opportunities and are therefore more in need of the right 'level of fashionability' when they shop, and those who appreciate covered shopping are more attracted to Stadshart because of this feature. Those who make a daily shopping trip more than 3 to 5 times a week are more likely to find promotions and events unimportant. This might be because they will visit the centre regardless of any activities.

Satisfaction regarding shopping centre attributes

People that shop more than 3 to 5 times a week for daily items are more likely to be less satisfied with service by personnel, promotions and events, atmosphere, design of the centre and covered shopping than those who shop less often. Those who make non-daily shopping trip more than once a week are more often satisfied with the fashion and trend sensitivity, and less often with the covered shopping and personal space and privacy. Generally speaking it seems as if the people that shop very frequently for daily products are clearly less satisfied with a certain number of attributes than the people who shop less often. An explanation for this is that in general shopping centres are evaluated more negative when the visit frequency is higher (Strabo, 2009). People that shop more often are also able to be more critical because they have more knowledge of the centre.

5.5.3. Relation cultural values and evaluation of shopping centre attributes

This section explores the influence of cultural values on the evaluation of shopping centre attributes. The input are the sets of variables on personal values, shopping values, importance and satisfaction that were recoded in §5.5.1.

Personal values

The correlations between personal values and shopping centre attributes are tested with Chi-square. Between personal values and importance of shopping centre attributes no correlations were found and between personal values and satisfaction regarding shopping centre attributes only two correlations appeared. The first is that people who are unsatisfied with facilities and services are more likely to hold social affiliation values than those who judge differently, and the second that people who are satisfied with the promotions and events at Stadshart are more likely to hold self-actualisation values than those who are dissatisfied. No correlations were found with the total level of satisfaction. These correlations however, do not imply any clear pattern. Consequently, there does not seem to be a clear or particularly interesting correlation between personal values and the evaluation of shopping centre attributes.

Shopping values

The correlations between shopping values and the evaluation of shopping centre attributes of Stadshart Amstelveen are tested with Spearman's ρ and Kendall's tau. In addition the correlation between the underlying dimensions from the factor analysis of importance and satisfaction regarding shopping centre attributes is tested with Pearson's r. The analyses were executed for both importance and satisfaction regarding shopping centre attributes.

Importance of shopping centre attributes

Hedonic shopping values

First the correlations between shopping values and the importance of shopping centre attributes were examined. The majority of the respondents that agree with the statement "shopping trips are truly a joy" assess parking facilities, and facilities and services as important, in contrast with those who don't. Respondents who agree with the statement "I enjoy shopping trips for its own sake, not just for the items I may purchase" assess retail mix more often as important. The people that agree with both the experiential statements are also more likely to find catering facilities and atmosphere important (correlations at $p<.1$ for "shopping trips are truly a joy"). The ones that perceive shopping as an escape are more likely to find personal space and privacy and orientation and way-finding important. The people that are able to forget their problems while shopping are more likely to evaluate facilities and services, fashion and trend sensitivity and promotions and events as important. Respondents that agree with both diversional statements also assess atmosphere of the centre more frequently as important in their decision on where to shop. Furthermore, hedonic shopping motives appear to correlate with catering facilities, fashion and trend sensitivity, promotions and events, and at $p<.1$ atmosphere of the centre. Overall the hedonic shopping dimension correlates with identity-related shopping centre attributes.

Utilitarian shopping values

Respondents who point out to feel self-conscious while shopping are more likely to assess parking facilities, facilities and services, covered shopping, personal space and privacy, and orientation and way-finding as important. Those who disagree with "a store is good because it has many well-known brands" are also more likely to assess covered shopping as unimportant. Respondents that identify themselves with the store they shop at are more likely to assess atmosphere of the centre and fashion and trend sensitivity as important in their decision on where to shop. Respondents that assess catering facilities as unimportant agree more often with statement "the time required for shopping has a big influence on my shopping experience" than those who think it is important. Those who agree with the statement "a store visit is good when it is over very quickly" indicate opening hours more often as important; those who disagree indicated retail mix more often as important. In addition, the utilitarian shopping dimension correlates with opening hours, covered shopping and personal space and privacy.

Satisfaction regarding shopping centre attributes

Hedonic shopping values

People that disagree with the statement "shopping trips are truly a joy" are more often dissatisfied with the facilities and services ($p<.1$), service by personnel, and personal space and privacy ($p<.1$) at Stadshart. Respondents that do truly perceive shopping trips as a joy are more often satisfied with the parking facilities, atmosphere, design of the centre and the covered shopping at Stadshart. People confirming that they enjoy shopping trips for their own sake are also more often satisfied with the covered shopping. Respondents agreeing with both diversional statements are also more frequently satisfied with the atmosphere, design of the centre and public space, and the covered shopping than those who disagree. People approving the statement "while shopping I am able to forget my problem" are more frequently satisfied with the retail mix and promotions and events at Stadshart as well. People who reject the statement are more likely to be clearly discontented with service by personnel. Furthermore the hedonic shopping dimension correlates with covered shopping, satisfaction with atmosphere ($p<.01$), and design of the centre ($p<.01$).

Utilitarian shopping values

Those who confirm that a store is good because it has many well-known brands are more likely to be satisfied with the parking facilities, the covered shopping and personal space and privacy at Stadshart, than those who reject the statement. Those who identify themselves with the store they shop in are more likely to be satisfied with the parking facilities as well. People who confirm to feel self-conscious during shopping are more likely to be satisfied with the retail mix. Futhermore, the utilitarian shopping dimension correlates with fundamental shopping centre attributes.

5.5.4. Conclusion

In this section the outcomes of the data analysis of interrelations between cultural values, shopping behaviour and evaluation of shopping centre attributes were presented. Each assumed relation was tested for significant correlations among the entire group of expats, which led to a number of interesting conclusions.

First of all the relation between cultural values and shopping behaviour was discussed. The findings implicated that, although not related to ethnicity, there does seem to be a relation between visit frequency and cultural values, in the sense that very frequent shoppers are likely to hold efficient shopping values. For the relation between the evaluation of shopping centre attributes and shopping behaviour was found that there is a connection between the importance of opening hours and very frequent daily shopping behaviour, and between the importance of fashion and trend sensitivity and infrequent non-daily shopping. However, clear explanations for these findings can not be given. With regard to satisfaction it seems that if the people that shop very frequently for daily products are clearly less satisfied with items like service by personnel, atmosphere and personal space and privacy. However, it appears to be a trend that evaluations turn more negative when visit frequency increases, probably because people know the centre better and are able to be more critical.

Finally, some interesting relations between shopping values and the evaluation of shopping centre attributes were found. Specifically, for example, people that perceive shopping as an experiential or diversional activity are keener on the availability of various facilities and services (such as parking and catering facilities) and atmosphere. The hedonic shopping dimension is also related to identity attributes in general, but this applies mainly to people that see shopping trips as an escape. In general the results seems to imply that when shopping is perceived as a hedonic activity it has to be in a convenient shopping venue with a distinctive identity. Another finding implicates that spatial aspects of the shopping centre are predominantly important for people who perceive shopping trips as an escape and who are self-conscious while shopping. This also applies for people with utilitarian shopping values. A relation between the utilitarian shopping dimension and the importance of opening hours exists as well, but is mainly valid for respondents with efficiency related shopping values. The utilitarian dimension also correlates with appreciation of fundamental shopping centre attributes such as location and accessibility, parking and retail mix. Furthermore, people that identify themselves with the store they shop at are more likely to find identity-related attributes important. Last but not least, exploration of the relation between shopping values and satisfaction with attributes of Stadshart Amstelveen unmistakably indicated that appreciation of the atmosphere, design of the centre and public space and especially covered shopping is related to hedonic shopping values. An explanation could be that those attributes form a distraction from the outside world, and in case of Stadshart that the covered shopping offers a distinct experience from other shopping venues.

All in all, for expatriates cultural values, shopping behaviour and evaluation of shopping centre attributes indeed seem to be interrelated. Although the exact influences of each concept can not be determined, there are some unmistakable correlations between shopping values and shopping behaviour on the one hand and between shopping values and shopping centre attributes on the other hand. This emphasizes the importance of values in shopping behaviour. Since shopping values differ cross-culturally, ethnicity presumably plays a role to a certain extent in this relation as well.

5.6. Enrichment with MOSAIC data

Earlier on in this study the segmentation method MOSAIC was mentioned (§ 2.2.2). The by Experian developed system compares consumers using demographical, geographical, psychographic and behavioural data, such as attitudes, values, product usage, brand and media preferences. There are separate frameworks per country, as well as a global framework that has been applied in 20 countries in North-America, Europe and Asia. Both Unibail-Rodamco and Strabo are currently working with MOSAIC: Unibail-Rodamco uses it as a basis for determining target groups, and Strabo has used the model to analyse visitor data of Stadshart Amstelveen. The collected data on expatriates has been enriched with MOSAIC data by Experian and analysed to find out more about the influence of lifestyle on the shopping behaviour of expats. The results are presented in this section.

Based on the six-digit zip code of respondents the collected data was enriched with three different types of data: MOSAIC household segmentation of the Netherlands, MOSAIC Global profiles and MOSAIC TrueTouch media profiles. The MOSAIC household segmentation of the Netherlands divides households into ten groups and 44 types on a two-dimensional scale of status/income and life stage/age. MOSAIC Global segments over 284 million households worldwide into ten global neighbourhood types on a two-dimension scale with a socio-economic dimension and a geodemographical dimension from urban to rural. The idea behind it is that people with similar backgrounds, interests and means are more likely to live in the same neighbourhood and that those patterns of residential segregation are similar world-wide. MOSAIC TrueTouch is in fact an extension of the MOSAIC household model. It classifies Dutch households into six groups and 23 types according to their preferences of media and communication channels and their decision styles (Experian, 2010). A more elaborate description of all the groups and types can be found in Annex 12.

5.6.1. Results

MOSAIC Households

Figure 5.11 shows an overview of the household profiles among expatriates in which four main groups can be distinguished that cover 82% of the sample, i.e. Free Spirits, Educated City Dwellers, Successful Families and the Prosperous. In each of these groups there is one household type that typically scores the heighest. The types Active Youngsters (A02), Culture lovers (B05), Opiniatives (F21) and Fortunate Cosmopolitans (I38) make up 56% of the sample. Besides these there were 20 other types among the respondents as well, varying from students to elderly. Seven people did not provide their full zip code which makes their profile unknown. Note, that the found MOSAIC profiles are an average of the six-digit zip code area only, which means that they are not completely accurate. Some flaws are revealed through checking the MOSAIC profiles with the actual characteristics of respondents. Examples of this are a Struggler and a Low Income Elder who earn more than €3.500 a month, and a Retired Enjoyer in the age of 25 to 34. Such results thus only tell something about the average household profile in the neighbourhood the respondent lives in, but not necessarily about their lifestyle. In addition, the Free Spirits all live in the secondary and tertiary catchment area; while Educated City Dwellers and Successful families are concentrated in the primary catchment area. The Prosperous are equally distributed in the primary and secondary catchment area.

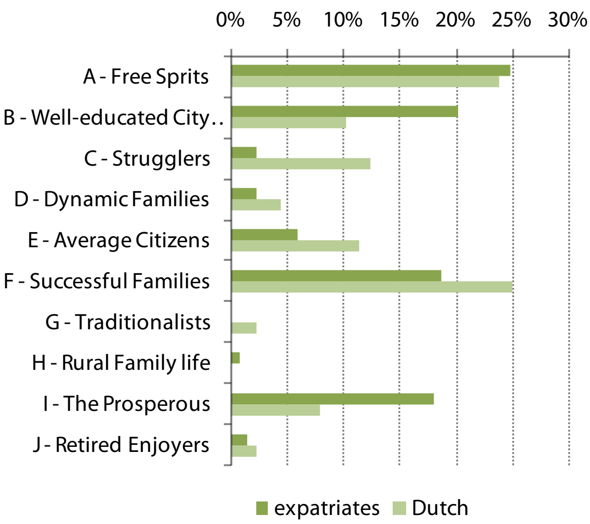


FIGURE 5.11 – MOSAIC HOUSEHOLD PROFILES (TOTAL SAMPLE)

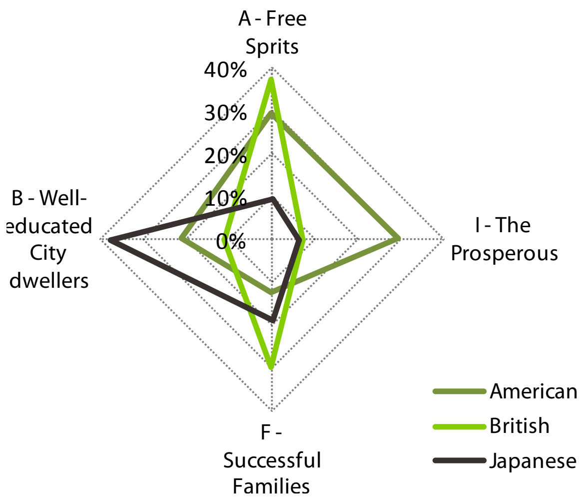


FIGURE 5.12 – MOSAIC HOUSEHOLD PROFILES PER CULTURE

Reviewing the distribution of profiles per culture (see figure 5.12) with a Chi-square test indicated there are significant cross-cultural differences. The main profiles present among the American expatriates are the Prosperous, Free Spirits and Educated City Dwellers. Among the British these are Free Spirits and Successful Families, and among the Japanese Educated City Dwellers and Successful Families.

The results have been compared to the MOSAIC profiles of Dutch consumers from the 2010 market analysis of Stadshart Amstelveen by Strabo as well (figure x). To make the data better comparable and decrease inaccuracies only the respondents with a Dutch background living in Amstelveen, Buitenveldert and Amsterdam and between the age of 20 and 55 years have been taken into account (N=177). No correction was applied for income, explaining the large share of Strugglers and Average Citizens among the Dutch. Among expats there are especially more Prosperous and Educated City Dwellers. Although the number of Successful Families is high among expats, it is even higher among the Dutch in Amsterdam and Amstelveen. According to a Chi-square all the mentioned differences are significant at $p<.001$.

MOSAIC Global

When the MOSAIC household profiles are converted to global profiles (see figure 5.13) the result becomes even more homogeneous, because the national profiles Successful Families and the Prosperous together form the global profile Bourgeois Prosperity. The Free Spirits convert to the Sophisticated Singles. The two main groups are therefore Bourgeois Prosperity (36%) and Sophisticated Singles (31%). The third largest group are the Comfortable Retired, which is somewhat odd because the majority of the respondents with this profile is younger than 44, and have various household types and occupations. Hence, this tells more about the neighbourhood these people live in, than about their actual lifestyle.

Between cultures there are only limited differences of which none are significant, indicating that indeed the lifestyles of expatriates are rather comparable. Compared to the Dutch respondents from the 2010 Market Analysis that live in Amstelveen, Buitenveldert and Amsterdam and are between the age of 20 and 55 years (N=177) there are significantly more Bourgeouis Prosperity and Comfortable Retirement households among expatriates. Among the Dutch there are more Career and Family households and Routine Service Workers. As stated before ,the fact that there was no correction for income applied is assumably an explanation for the differences.

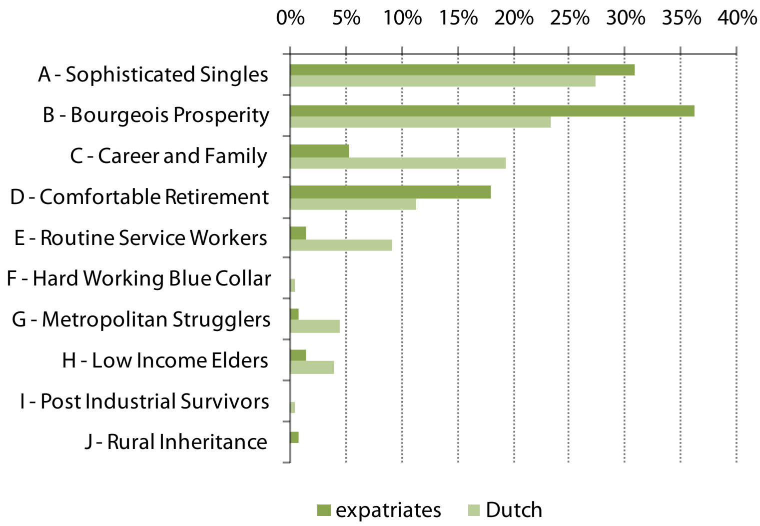


FIGURE 5.13 – MOSAIC GLOBAL PROFILES FOR TOTAL SAMPLE

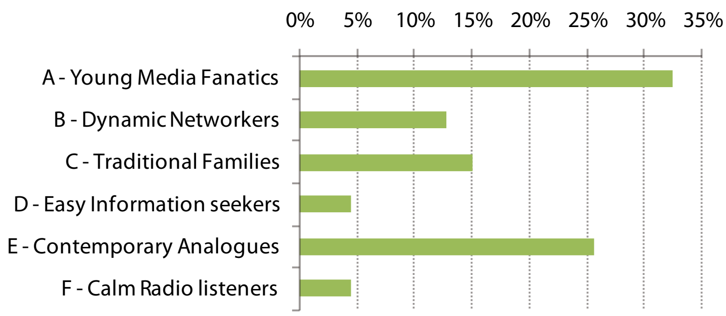


FIGURE 5.14 – TRUETOUCH PROFILES FOR TOTAL SAMPLE

TrueTouch

Figure 5.14 shows that two main media profiles can be distiniguished that account for 58% of the sample, that is Young Media Fanatics and Contemporay Analogues. The Young Media Fanatics among expatriates are not necessarily young, but they are mostly one- or two-person households. They are characterised by the use of technology and different types of media. The Contemporary Analogues are generally older than 35 and have a family. They prefer to use their phone and are keen on face-to-face contact. The heighest scoring types are the Multichannel Media Fanatics (A01 - 26%), Successful Networkers (B04 – 9%), Digital Families (C09 – 11%), Socially Active Analogues (E16 – 8%) and the Urban Analogues (E20 – 10%). The first three types are characterised by relatively impulsive buying behaviour, while the other two types prefer to gather a lot of infomation and rather make a quick but acceptable decision instead of waiting for perfection. The data could not be compared to the media profiles of the Dutch, because they are not availabe. Accross cultures there are no clear differences.

Role of lifestyle

To find out if lifestyle is an explanation for some of the findings in the previous sections of this chapter, some statistical tests of differences were performed on the main MOSAIC profiles. With regard to personal values, shopping values and shopping behaviour no significant differences were found applying a Chi-square, one-way ANOVA and Mann-Withney U test, respectively. A one-way ANOVA was used to examine differences with regard to shopping values, and importance and satisfaction regarding shopping centre attributes. The results indicated that Free Spirits find parking facilities significantly less important than Educated City Dwellers, Succesful Families and the Prosperous. Educated City Dwellers are more satisfied with facilities and services and service by personnel than Free Spirits. In accordance with these findings the global MOSAIC profile Bourgeois Prosperity are more likely to find parking facilities and fashion and trend sensitivity important. Sophisticated singles are more likely to find parking facilities unimportant and service by personnel important. They are also more likely to be unsatisfied with the location; presumably because they all live in the secondary and tertiary catchment area. Contemporary Analogues find parking facilities, facilities and services and fashion and trend sensitivity significantly more important in their choice of shopping venue than Young Media Fanatics. Young Media Fanatics on the other hand are significantly less satisfied with the location, the design, the covered area of Stadshart Amstleveen and the orientation and wayfinding within.

5.6.2. Conclusion

The analysis points out that in fact four different types of MOSAIC household profiles can be distinguished among expatriates, namely Free Spirits, Educated City Dwellers, Successful Families and the Prosperous, and three types of MOSAIC Global profiles, namely Sophisticated Singles, Bourgeois Prosperity and the Comfortable Retired. In accordance with this are the predominantly occurring True Touch media profiles Young Media Fanatics (characterised by impulsive buying behaviour and use of various media) and Contemporay Analogues (characterised by gathering lots of information befor decion making and a preference for face-to-face contact). So on the one hand expatriates are a rather homogeneous group, while on the other hand they are still completely different, because they are all in different life stages and have different decision styles. With regard to evaluation of shopping centre attributes some differences were found between lifestyle segments, such as the difference in importance of parking facilities between Free Spirits and the other groups, and the importance of fashion and trend for Bourgeois Prosperity. However, although expected, no differences were found for personal values, shopping values and shopping behaviour. Except for the rather small sample size, there is no immediate explanation for this remarkable finding.

FRIDAY MARKET AT STADSHART AMSTELVEEN (SOURCE: FLICKR.COM)

6. CONCLUSIONS AND RECOMMENDATIONS

6.1. Conclusions and recommendations

In the first chapter two research questions were posed on how shopping centre attributes (of Stadshart Amstelveen in specific) can be adapted to culture-related shopping behaviour of expatriates. These two questions demanded further investigation. In the literature review the concepts of cultural values, shopping behaviour and evaluation of shopping centre attributes were examined. Subsequently an online questionnaire was developed to gather information among expatriates in Amstelveen and Amsterdam. In order to answer the six sub-research questions statistical analyses for differences and correlations were performed on the results, and a comparison was made with existing data on Dutch consumers. In addition, the data was enriched with MOSAIC household profiles to gain some insight in the role of lifestyle. In this chapter the findings from both literature and data collection will be combined to answer both the theoretical and practical research question.

6.1.1. Theoretical research question

How can shopping centre attributes be adapted to culture-related shopping behaviour of American, British and Japanese expatriates?

Shopping behaviour appeared to be a dual concept that is the outcome of an individual's decision-making process based on the evaluation of shopping centre attributes, but under the influence of values and attitudes. A distinction was made between general values and shopping values, and the classification of utilitarian versus hedonic shopping values was taken as a starting point. From the results of the data collection followed that indeed this distinction of values and attitudes is an important one. The high scores of expatriates on fun and enjoyment and warm relations on the one hand, and time-awareness and product-reliability on the other hand, might be a result of the busy, adventurous and high-end lifestyle that being an expatriate comes down to. These results point towards the idea that expatriates fit a more universal profile or lifestyle.

With regard to ethnicity it was found in the literature that American, British, Japanese and Dutch consumers clearly differ with regard to values and shopping behaviour. Especially the Japanese culture seems to differ from the others because of their collectivist viewpoint and the importance of uncertainty avoidance. The other three groups are more alike because of their shared Western background. Differences in shopping behaviour between cultures seem to be the result of cultural values, cultural constraints (learned conventions that are shared by a cultural group) and lifestyle. The data collection confirmed the value differences between cultures. To oversimplify the differences: Japanese expatriates seem to hold a more experiential and hedonic attitude towards shopping, while the British and Americans seem to hold more efficient and utilitarian values. However, it has to be kept in mind that the three cultural groups are not completely equal in age, gender, household type and daily occupation, which might be an important cause for their attitude differences as well. The actual shopping behaviour of expatriates differs from that of the Dutch with regard to visit frequency: it appeared that expatriates shop more often than the Dutch. Differences across cultures however, do not directly seem to be related to ethnicity, but more to place of residence, household type, age and occupation.

The literature pointed out that a great number of shopping centre attributes are adjustable to culture. In fact, three levels on which they are adjustable can be recognized: the shopping centre, the store and the product assortment. Some of the attributes can be explained by differences in cultural values and others by the existing retail structure in the home-country of expats or by cultural constraints. For example, the importance of service is more related to cultural values, while opening hours are an attribute of the existing retail structure and a result of historical constraints with regard to government regulations. The product assortment and brand mix that is preferred in a specific culture can have to do with cultural constraints such as cuisine and fashion style, while parking facilities may depend on constraints regarding mobility. According to the data analysis cultural constraints also seem to play a role in the evaluation of shopping centre attributes. To illustrate, the emphasis that the Japanese put on parking facilities for example seem related to their uncommonness with shopping by car, and the positive evaluation of opening hours and orientation and way-finding by the British at Stadshart is related to similarities in the retail structure between the UK and the Netherlands. The rather equivalent evaluations of Stadshart by expatriates on the other hand strengthen the idea that expats have a similar reference frame because of their lifestyle.

In addition, there appear to be interrelations between the three concepts. With regard to the relation between cultural values and shopping behaviour it seems that very frequent shoppers are likely to hold efficient shopping values. From the correlation between shopping behaviour and the evaluation of shopping centre attributes follows that dependent on the visit frequency items like opening hours and trend and fashion sensitivity are evaluated as more or less important, and that evaluations on service by personnel, atmosphere and personal space and privacy turn more negative when visit frequency increases. Moreover, a different shopping attitude influences the evaluation of shopping centre attributes. So when shopping is perceived as a hedonic activity parking facilities, catering facilities and facilities and services and a distinctive identity become more important. The appreciation of the atmosphere, design of the centre and public space and covered shopping is also related to hedonic shopping values. Utilitarian shopping values correlate with importance of opening hours and spatial attributes, and appreciation of fundamental shopping centre attributes such as location and accessibility, parking and retail mix.

Analysis of the data on MOSAIC household profiles pointed out that in fact four different types of expatriates can be distinguished: Free Spirits, Educated City Dwellers, Successful Families and the Prosperous. So on the one hand expatriates are a rather homogeneous group, while on the other hand they are still completely different, because they are all in different life stages and have different decision styles. Differences between lifestyle profiles exist regarding the importance of parking facilities, facilities and services and fashion and trend sensitivity.

As a result of the differences and correlations that were found it can be assumed that shopping centre attributes can be adapted to shopping behaviour related to cultural values. An overview of attributes that can be adapted to the shopping behaviour of expatriates based on both literature and data analysis is presented in figure 6.1. Adjustments can take place on the level of the shopping centre, the store and the product assortment. The literature already implicated that adjusting attributes to an ethnic market segment can be done to different extents of which the 'ethnic mall' is the most extreme version.

- Location and accessibility
- Retail mix
  - Brand mix (international)
  - Variety of stores
  - Merchandise (style, fashionability, sizing)
- Opening hours
- Atmosphere
- Covered shopping
- Service by personnel
- Design of the centre and public space
- Parking facilities
- Sanitary facilities
- Catering facilities
- Facilities for children
- Leisure facilities
- Language of information
- Signage
- Promotions

FIGURE 6.1 – OVERVIEW OF SHOPPING CENTRE ATTRIBUTES ADAPTABLE TO EXPATRIATES

Attributes that are important for the positioning of a shopping centre towards expats are location and accessibility, retail mix, opening hours of stores, atmosphere and covered shopping. In addition the attributes that were up for alteration at Stadshart have been put next to the overview of key shopping centre attributes from paragraph 3.5. Hence it appears that in terms of retail mix especially the (international) brand mix, variety of stores and product assortment (in terms of style, fashionability and choice of sizes) can be adapted to match the desires of expats. Other features that can play a role in the positioning towards expats are parking facilities, offer of gastronomy, leisure facilities, sanitary facilities and cleanliness of those, facilities for children, language of information, signage and promotions, and service by personnel.

All aspects considered, it seems that both lifestyle and ethnicity play a role in the cultural values, shopping behaviour and evaluations of shopping centre attributes of expatriates. The data analyses in general confirm the similarities across the whole sample of expatriates. The cultural differences that were found in shopping behaviour and attribute evaluation seem to be a result of cultural constraints. Some of the differences across cultures though, are more a matter of place of residence, household type, age and occupation, i.e. lifestyle. The literature on the other hand, indicates that place of residence and occupation is culture-related to a certain extent as well. The Japanese for example prefer Amstelveen and Buitenveldert above Amsterdam city centre as a place of residence because of the special facilities for them such as schools and stores and the closeness of other Japanese expats. The British and Americans for whom the education of children and being 'in-group' is less crucial than for the Japanese, such issues are not necessarily leading in their location choice. The same applies to occupation, which can be a result of cultural constraints as well: this explains the large number of housewives among the Japanese and the time they have for shopping. All in all, the results point towards the idea that expatriates fit a more universal profile or lifestyle, while they also underpin the importance of a marketing strategy incorporating cultural differences.

Thus far, this study has addressed a very specific topic that is inspired by the case of Stadshart Amstelveen. However, the results also have implications for retailers, shopping centre developers and operators in general in areas with a high number of expatriates all over the world. Apart from that the conclusions can also be applicable in situations where one copes with (specific groups of) immigrants and (shopping) tourists such as border towns or other destinations. In all those cases it is vital to have insight in the cultural dimension of the market in general and in interesting ethnic niches, both in terms of ethnicity and lifestyle. The results of the study implicate that a culturally distinct target group needs to be studied in terms of values, cultural constraints and consumer behaviour, as well as perception of the shopping centre in terms of functionality, identity and space. In case of expatriates it is necessary to keep in mind which part of their values, shopping behaviour and perception of shopping centre attributes are related to their lifestyle. Furthermore, in terms of lifestyle using a typology of shoppers inspired on their shopping attitude can provide useful insights in their behaviour and preferences as well.

6.1.2. Practical research question

What can Unibail-Rodamco do in terms of shopping centre attributes to attract expatriates to shopping centre Stadshart Amstelveen?

Before answering this question, there is in fact an underlying issue that has to be addressed first. That is the question if Stadshart Amstelveen is currently attracting the number of expats that, within all reason, Unibail-Rodamco can expect. In that perspective it appears that although the general shopping frequency of expatriates is clearly higher than that of the Dutch, expats do not visit Stadshart Amstelveen more often than Dutch consumers. To illustrate, expatriates make 3.3 daily shopping trips a week and 1.4 non-daily shopping trips compared to a total of 2.5 shopping trips a week by the Dutch, while the visit frequency of Stadshart Amstelveen in the primary catchment area is 1.3 daily visits a week and 0.9 non-daily visits a week compared to 1.3 visits a week by the Dutch. Consequently, there is still a share of visitors to gain among expats in the whole catchment area. Subsequently, it has to be determined how shopping centre attributes can be adjusted to attract this share of expatriates.

According to expats the most important selling points of Stadshart are its location and accessibility, the covered shopping area, and the weekly open markets. Therefore it is important to cherish, maintain and exploit those features. The main aspects that need to be considered for adjustment are retail mix, opening hours, service by personnel, fashion and trend sensitivity, catering facilities, sanitary facilities and the parking tariff. These items will be discussed in more detail in the next section, where also other recommendations will be provided. The recommendations will focus on the different levels on which interventions can take place: the shopping centre, store and product level. Some of these suggestions are already taken into account by Unibail-Rodamco as a part of their strategic development plans. Some of the recommendations also fit into general trends or came forward in studies among the Dutch as well.

Shopping centre

- **Extend the opening hours during the weekends and at night**. From the data analysis follows that opening hours are very important for very frequent daily shoppers in their choice of shopping venue; this was mentioned spontaneously by 11% of the visitors of Stadshart and 78% of them indicated that they would make use of extended opening hours. Apart from the legal restrictions, it remains uncertain though what the cost of this might be versus the benefits. In addition, Amsterdam already has a strong advantage because of their status as a touristic area which allows them to have the stores opened every Sunday. For that matter, extension of opening hours is currently a topical issue within the Dutch retail landscape as well.

- **Lower the parking tariff**. Over 20% of the expats visiting Stadshart comment on the height of the parking fee. The 1.5 hours of free parking at Gelderlandplein are mentioned as a comparison in particular. Several Japanese expats proposed to use a discount system connected to buying and consuming at Stadshart. It is unclear though what the benefits of lowering the parking fee will be compared to the costs.
- **Extra sanitary facilities**. Just like the parking tariff over 20% of the visitors complained about the availability of toilets at Stadshart. Therefore creating a second spot with sanitary facilities that are not connected to a store would be worth considering. Important is that they are clean and free of charge, and have adequate changing facilities for babies.
- Other aspects that could be adapted on the level of the shopping centre is employing a more **mother and child friendly attitude**, since there is a relatively large number of expat mothers without a job and with a great amount of free time for activities like shopping and having lunch. There is also a large segment of mothers who pass by the centre every morning to bring their children to the international school. Possible solutions are more kid's fashion stores, a playground area, family-oriented restaurants, and special activities, promotions and services. Another idea is to target expats specifically by **advertisements in English** (as a pilot project), for example on expat websites or via door-to-door advertisement or local weeklies.

Store

- **Retail mix and fashion and trend sensitivity**. The data analysis indicated that there is quite a discrepancy between the importance of retail mix and how it is assessed at Stadshart. In addition, the appreciation of both retail mix and fashion and trend sensitivity is much lower than that of the Dutch. It also appeared that fashion and trend sensitivity are important for infrequent daily shoppers in their decision where to shop. Expatriates mainly wish for an offer including specific international brands that is fashionable and stylish. They refer to brands like GAP, UNIQLO, Victoria's Secret and Marks & Spencer and designer clothes brands that are not available in the Netherlands. A lot of expats therefore order clothes online, bring them from their home-country or buy them elsewhere abroad. A part of the expats also would like to see more unique and local (specialty) stores.
- **Greater variation in gastronomy**. Expats mainly indicated to miss restaurants or cafes with a specific concept such as healthy food, family restaurants, options for a quick lunch and a coffee bar.
- **Service by personnel**. This item is assessed very poorly by the expat visiting Stadshart Amstelveen. However, it is hard to change this because it is the responsibility of the retailers themselves. Nonetheless, Unibail-Rodamco can create awareness for this aspect by emphasizing the importance of service, training of personnel and English-speaking staff.
- Furthermore there are some additions that become possible when the centre is extended, such as an **ethnic food store or second supermarket** with a larger ethnic assortment or more specialty food and delicatessen shops. The difficulty with food though, is that it is bought locally, so increasing the offer of food will mainly attract visitors from the primary catchment area. Besides, it will be hard to compete with the existing concentrations of expat stores at Kostverlorenhof and Gelderlandplein and its vicinity. Another option is to implement more **leisure facilities** like a commercial cinema to make the centre a fully comprehensive leisure destination. **Wellness facilities** might predominantly target the primary catchment area.

Product

- **Product selection**. Attracting expatriates is not necessarily a matter of introducing specific stores, but could also be in modifications and extensions of the product assortment with specific products. It is important to realise that expats form a strong community who inform each other on where to go for specific products and services. Examples of possible adjustments are an extended ethnic food assortment or a larger selection of

English books (although for the latter it may not be worth competing with existing specialty book stores and the internet). Extending the product assortment can also be done temporarily for instance during specific ethnic holidays. In general the choice in clothing sizes could also be extended as a part of the product selection, for example by offering both a petite and large-sizes next to the regular clothing (although this might need a complete attitude change in Dutch retailing).

- **Offer of services**. The research results implicated that hedonic shoppers evaluate the availability of facilities and services as important. Although there was no clear trend that specific services were missing, some of the respondents came up with interesting suggestions that are worth mentioning such as a service or information desk, lockers and a centre-wide gift voucher.

6.2. Further research

In this section some recommendations for further research will be given that were inspired on limitations and outcomes of this study and decisions that were taken during the course of it. To start with, some pragmatic decisions have been made with regard to the applied research methods. An example is the translation of the questionnaire that preferably would have been translated using translation / back-translation to eliminate translation-related doubts during interpretation of the results as much as possible. In general, because this is a multidisciplinary study, it should preferably have been conducted by a culturally diverse team of experienced specialists with different expertises to get maximum valid results. In future studies this should be taken into account.

Secondly, because of the exploratory character of the study the 'general' shopping behaviour of expats was studied. This has inevitably caused a great deal of inaccuracy due to estimations and misperceptions of the respondents' own behaviour. In addition, nothing is known about the expenditure of expats and the share of turnover they create. Therefore, the image of shopping behaviour of expats is not complete. A study on the actual shopping behaviour of expatriates through on-site visitor surveys or observations in combination with in-depth interviews ('accompanied shopping trips') could provide additional insights.

Thirdly, the findings of this study implicate that the shopping behaviour of expatriates is influenced by both ethnicity and lifestyle. However, the exact influence of each is not measured. To gain a complete insight in the influences of both it would be interesting to conduct a study comparing the behaviour of expats world-wide, behaviour of natives in the host-countries, and behaviour of expats in their country-of-origin. Another limitation is that apart from ethnicity and lifestyle, other factors such as place of residence, household structure, age and occupation influence the shopping behaviour of expats as well. Again the exact influence of each factor was not determined and might be interesting to study in future research. In addition the chosen distribution channels for data selection lead to a high number of respondents that were female, house wife and / or had a family with children and an underrepresentation of one- and two-person households. This has probably caused a certain amount of bias and made it impossible to investigate the role of gender. In future studies this could be taken into account as well.

Furthermore, the study has explored the relations between cultural values, shopping behaviour and the evaluation of shopping centre attributes. However, the influence of each concept on the other has not been investigated. Since it was found that there are interrelations between them, it might be interesting to investigate this influence. In addition it might be interesting to apply more advanced modelling techniques, such as structural equation models, to investigate more complex relations between the variables and constructs included in the study.

And last but not least, separate further exploration of the notion of shopping values might be very interesting too because of the highly significant differences between cultures and the correlations with shopping behaviour and the evaluations of shopping centre attributes. In line with that it might be interesting as well to conduct some experimental studies on differences in perception of the shopping environment across cultures and across groups that hold different shopping values. For all recommendations on future research applies that the sample size per cultural group should be an important point of attention in order to further strengthen conclusions.

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REMBRANDTHOF AT STADSHART AMSTELVEEN (SOURCE: UNIBAIL-RODAMCO)

ANNEXES

ANNEX 1

Cultural dimensions by Hofstede (2001)

Power distance (PDI)

Power distance is "the extent to which less powerful members of a society accept and expect that power is distributed unequally". Indicators of power distance are the acceptance of hierarchy and authority, and the strength of dependency in relationships such as parents and children or bosses and subordinates. An indicator of a low power distance is that children are raised to be independent on a young age, that people want to keep looking young, and that equality in rights and opportunity are important values.

Uncertainty avoidance (UAE)

Uncertainty avoidance is "the extent to which people feel threatened by uncertainty and ambiguity and try to avoid these situations". A need for rules to structure life, trust in experts, and formal communication are manifestations of high uncertainty avoidance. These cultures value purity, are process instead of result oriented, and show a higher level of anxiety, aggressiveness and emotions, because conflict and competition are perceived as threatening. Low certainty avoidance cultures are characterised by common sense, generalists, less ritual behaviour, and a tendency to strive for as less rules as possible.

Individualism versus collectivism (IND)

Individualism means that "people look after themselves and their immediate family only", while collectivism stands for "people belong to in-groups who look after them in exchange for loyalty". Personal identity, expression of private opinions, and self-actualisation are important values in individualistic societies. In collectivistic cultures members derive their identity from their social network. Harmony with in-group members and prevention of loss of face are important.

Masculinity versus femininity (MAS)

The dominant values in a masculine society are achievement and success; the dominant values in a feminine society are caring for others and quality of life. Key indicators of a masculine society are a focus on performance, achievement, status, winning, showing success, and a strong role differentiation between men and women. Big and fast are considered to be beautiful. Feminine cultures are characterised by a tendency to strive for consensus, by valuing quality of life over competition and by being more service and people oriented. People in feminine cultures consume for use, while people in masculine cultures consume for show.

Long-term orientation (LTO)

This dimension was incorporated later into Hofstede's model of dimensions. Societies with a long-term orientation are characterized by a belief in more than one truth and by the acceptance of change, perseverance, thrift and search for peace of mind. An indicator of a short-term orientation is a tendency to spend now instead of saving for tomorrow.

Cultural dimensions and characteristics by de Mooij (1998)

United States	Japan	The Netherlands
Monochronic time culture[1]	Polychronic and monochronic time culture	Monochronic time culture
Linear thinking, time is compartmentalized	Circular time concept	Linear thinking, time is compartmentalized
Low-context[2]	High-context	Low-context
Man must conquer nature	Harmony with nature rather than conquest over nature	
Individualistic	Collectivistic	Individualistic
Masculinity	Masculine	Feminine
Below average power distance	Above average power distance	Small power distance
Relatively weak in uncertainty avoidance	Strong uncertainty avoidance	Relatively weak in uncertainty avoidance
Short-term thinking, which influences all aspects of American life: the bottom line, success now rather than in the future, extremely short-range schedules	Long-term thinking	Longer-term thinking
Obsession with change, "new" and "better"	"New" is accepted as a collective necessity; but basically the Japanese do not like change. Obsession with cleanliness, purity	Traditional; reverence for the past
More a credit card than a debit card culture	A cash culture, not a credit card culture	More a debit card than a credit card culture
Hype, persuasive communication, and rhetoric, expression of private opinions	Private opinion not expressed	Rhetoric
Equal opportunity	Pressure on every Japanese person to know his or her place, to behave like his or her neighbours, not to shame his or her family, and to avoid jolting social harmony	Equality, not so much in opportunity as in freedom and care
Independence	Dependence	Independence
Need for privacy, universalistic thinking, ethnocentrism		Need for privacy, universalistic thinking, preachers
Winning, power, success, and status are important	Status is important to show power and success, but avoid standing out in a crowd: "the nail that sticks out will be hammered down"	Winning is OK, but not its display; status is not important. Caring rather than winning is the ideal
Strong role differentiation	Strong role differentiation	Small role differentiation
Humor, innovativeness, creativity	Thrift, perseverance	Thrift, perseverance, consensus seaking, jealousy
Education valued only if it allows the individual to compete more effectively	Education has an intrinsic value, which cannot be measured purely in terms of	Education beyond the basic ability to get a job
Education teaches students to "be critical", makes them think. Students ask "why?" not "how?"	Educates is based on teaching students to be critical. The very meaning of "to think" is differently understood. In Japanese culture, it means something like, "to find an answer that can be shared by others". Students ask "how?" instead of "why?"	

[1] Monochromic time is revealed through the importance of planning, scheduling, and punctuality. Polychromic time cultures value human interaction over time, and care more about what will be achieved instead of when.

[2] In low-context cultures words and argumentation are valued highly, and communication is direct and unambiguous. In high-context cultures communication is less explicit and full of symbolism; messages are therefore often part of the context or of the person's behaviour.

ANNEX 3

Overview of shopping centre attributes from literature

Performance area	Overview from Presentation Workshop Stadshart Amstelveen: a second analysis (Strabo, 2009)	Consumer needs related to the shopping environment (Verbunt, 2005)	Ten most important shopping centre attributes (Shim and Eastlick, 1998)	Shopping centre attributes as used by Dennis (2005, based on McGoldrick (1992a)	Shopping centre attributes in marketing mix (Oppewal, 1995)	Classification of shopping centre attributes (by author)
Location	Accesssbility Car accessbility	Accessibility	Convenient location	Access by car Access by bus	Travel time Public transport accessibility	Accessibility / Location
	Car parking Parking tariff	Parking	Sufficient parking Safe parking	Parking facilities	Parking convenience Parking costs	Parking facilities
Functional	Retail mix / Choice of shops Quantity of shops	Shop/brand mix	Specialty retail mix	Choice of major stores Variety of stores Big shopping centre (retail mix/choice) Good food shop / supermarket	Large choice range Number of smaller stores Number of supermarkets	Choice of shops Quantity shops
			Value for price	General price level	Competitive prices	Pricing shops
	Quality shops			Quality of stores		Quality shops
			Quality merchandise	Product selection in stores Stores opening hours	Food product categories High quality products Selection food and packaged goods stores	Product selection / Merchandise Stores opening hours
	Supply of catering Supply of leisure	Food and leisure facilities		For eating and drinking	Coffeeshops, cafés and restaurants	Catering facilities Leisure facilities
		Other general and commercial services and facilities		Toilet facilities Baby care facilities Place to take children (facilities) Availability of seats	Many additional services Number of other services, facilities or offices (bank, post office, library, travel agency)	Other services and facilities
Spatial-physical	Atmosphere	Atmosphere	Pleasant atmosphere	Friendly atmosphere Nice place to spend time Shoppers nice people	Attractive and comfortable store interior Attractive window displays	Atmosphere
	Climate	Physical comfort Physical safety		Covered shopping / shelter Air conditioning When weather is bad	Indoors	Climate / Physical comfort
		Accessible entrance Accessible elevation points		Get out easily to local shops/cafes		Accessible of entrances
	Social safety	Social safety	Safe environment	Standard of security Undesirable characters		Social safety
		Spacious pathways	Spacious walkways	Spaciousness Level of crowds	Pedestrian area Crowding	Personal space / Privacy
		Orientation				Orientation / Way-finding
	Public space	Architecture/design		General layout General décor Pleasant environment outside Lighting	Pattern of store locations Furnishings and decorations Greenery Maintenance	Architecture / Design of public space
		Cleanliness	Cleanliness	Cleanliness		Cleanliness
Marketing	Fashion / trend sensitive Service Promotions and events	Marketing instruments	 Promotion attributes	Lively or exciting (personal taste) 'In-place' to go Helpfulness of staff Advertsing and marketing activity Loyalty scheme/customer card	 Friendly, courteous service Street activities	Fashion / Trend sensitivity Service by personnel Marketing activities

Analysis of 'ethnic' shopping centres

Hispanic Retail Group – Hispanic consumers

The Hispanic Retail Group is a retail development consortium that redevelops dying malls into Hispanic market retail centres. The group operates in California, Texas, Arizona, Nevada and Georgia and their centres have names like La Gran Plaza, Las Flores, Plaza Fiesta and Plaza Mexico and contain elements of 'typical' Mexican décors in their design (The Legaspi Company, 2009). The centres of the Hispanic Retail Group are based in highly ethnic neighbourhoods. An example is the centre in Inglewood, California, which is anchored by the Mexican supermarket Gigante. Approximately 46% of the population of Inglewood is Hispanic and within the 1-mile catchment area around the centre even up to 57% has a Hispanic background ("Segregation and shopping", 2009). According to the founders of Hispanic Retail group the key to success in developing 'ethnic shopping malls' lies in catering to the community's needs and being sensitive to the cultural differences between markets (Shearin, 2006). The centres of the group distinguish itself by adapting to the Latin-American lifestyle and taste, which means more than bilingual staff and signage. Characteristic for the Latino lifestyle is the high orientation on the family. Therefore extra wide isles and more entertainment for children are realized to make the mall attractive for big families. Since Hispanics prefer to buy certain ingredients fresh on the day of preparation instead of weekly, the supermarket offers more fresh and ripe products, more cheese products, and a large in-store bakery and meat department, where meat can be custom cut and tortillas can be made on the spot (Hazel, 2005; Shearin, 2006; "Segregation and shopping", 2009). On the other hand Hispanics also demand for American products and brands, since there is a growing new generation of Hispanic origin, that speak English and that have never been to their country of origin, and that live a broader defined Hispanic lifestyle, that for example includes enchiladas as well as Starbucks (Shearin, 2006).

Mitsuwa Marketplace – Japanese consumers

Mitsuwa Marketplace is a chain of shopping centres that caters to a Japanese target group selling Japanese groceries, products and services. A total of eight shopping centres are operational of which five in Southern California, and the others in San Jose, Chicago and New Jersey. The centres typically exist of a Mitsuwa supermarket, some specialty shops and a restaurant area. The shops (including a bakery, bookstores and stores for gift items, confectionery, tableware, pottery, home decoration, cosmetics, health supplements, and car accessories) mainly offer imported products from Japan. The restaurants offer Japanese, Korean and Chinese dishes like sushi, noodles, curry, cakes, and traditional Japanese lunch boxes. Services include a Japanese video rental, Japan-oriented travel agency, a Japanese beauty and hair salon, a parcel service to Japan, and a dentist with Japanese speaking staff. The Mitsuwa chain also operates an extensive web shop with a great selection of products and gifts. The store regurlarly organises demonstrations of Japanese cuisine and events in honor of Japanese festivals. The design of the stores is limited to a simplified Japanese roof element that is placed in front of the big box that accommodates the store (Mitsuwa, 2007; 2010).

South DeKalb Mall, Atlanta, Georgia – Afro-American consumers

Despite having lived in the USA for several generations, African-Americans still demand a product assortment that gives them the opportunity to express their background and differences. The Gallery at South DeKalb is one of the malls that have exploited this opportunity successful and caters completely to an African-American market (Thor Equities, 2007). The mall is located in an area that accommodates one of the most affluent African-American communities in the USA and contains more than 600.000 possible customers within the primary and secon-dary catchment area. In the 90's the South DeKalb mall suffered from declining sales and responded by restyling the mall into a 'Afro-centric retail centre", presenting a mainly African-American oriented product assortment. Anchors were nationally operating department stores and specialty stores, but with different products mixes on offer. For example cosmetics for darker skin tones, more lively coloured apparel, African fabrics, adjusted clothing sizes with increased fit for African-American women, a greater focus on gospel and R&B in CD-shops, and t-shirts and memorabilia with black (sports) icons. The success of this mall has inspired similar repositioning in other areas of the USA including Milwaukee, Wisconsin and Chicago, Illinois (Lavin, 1996).

Diamond Jamboree, Irvine, California – Asian consumers

The Diamond Jamboree is a 10.600 square meters Asian-themed shopping mall that opened in 2008 and that is located in Irvine, a suburban city south of Los Angelos. Approximately one-third of the population in the catchment area is Asian but, although Asian-oriented, the centre attempts to reach a broader target group by offering "a multicultural dining and shopping experience" (Diamond Jamboree, 2009). The centre caters to a new kind of ethnic community that speaks English and demands a lifestyle that is both pan-Asian and American. Therefore the Korean grocer H-mart offers American breakfast cereal next to Chinese, Korean and Vietnamese products ("Segregation and shopping", 2009). The centre contains 38 stores in total including, apart from H-mart, a Taiwanese bakery, a Korean bank, a video store with a selection of popular Asian movies, some Asian beauty centres, an acupuncture centre, and a photo sticker store (the latter is a popular concept among teenagers in Japan, Korea and Taiwan). Furthermore there are some Korean, Japanese, Taiwanese and Thai restaurants and fast-food chains, two tea houses and a karaoke lounge, next to a small selection of restaurants offering American and European cuisine (Diamond Jamboree, 2009).

Japanese Centre, London – Japanese consumers

In London a shopping centre targeting Japanese can be found on Picadilly Circus. The Japan Centre exists of several departments. There is a food shop selling imported foods, fresh meat and fish that can be sliced on demand, handmade bread and desserts, and deli like sushi and sashimi. There is also a bookshop offering books, magazines, gifts and home wares, a travel centre, a restaurant and a tea/sake shop. In addition the centre has a recruitment agency in place targeting the Japanese market in London. The centre also operates an extensive web shop with an extensive selection of products including origami, calligraphy, gifts and wrappings (Japan Centre Group, 2010a; 2010b).

De Bazar, The Hague

The Bazar is a covered shopping centre is situated in the multi-cultural quarter 'Schildersbuurt' in the Hague. In 2008 over 90% of the inhabitants of the Schilderwijk were immigrants, mainly from Turkey, Morocco and Surinam. The centre contains several small-scale shops that sell products from all over the World, but mainly from Africa. There are some supermarkets selling exotic and African groceries, an Islam butcher, a fish market, an African textile shop, and an African music and film store, a (Turkish) hairdresser, a telephone shop and a tobacco shop (City Mondial, n.d.).

Amsterdamse Poort, Amsterdam

Amsterdamse Poort is quite a large shopping centre in the southeast of Amsterdam, close to the Arena-area and station Bijlmer Arena. The centre exists since 1987 and contains 225 shops. A great number of immigrants live in the area: over 62% are non-western immigrants and 8% are western immigrants. The centre slogan is "shopping centre of a city of the world". The centre contains permanently covered market called the 'Shopperhal' where groceries, clothing, accessories and gifts are on offer in several ethnic markets (Ondernemersvereniging Amsterdamse Poort, n.d.).

Osdorpplein, Amsterdam

Shopping centre Osdorp is situated around the Osdorp centre square in Amsterdam. 41% of the inhabitants of this area are non-western immigrants and 10% are western immigrants. A distinctive part of the shopping centre is the so-called 'Shoperade', which is a kind of covered bazar that offers "a shopping trip through several cultures". The centre contains around 50 units of small ethnic shops, exotic food markets and eateries that are run by local retailers. Products on offer are daily groceries, clothing, bags, jewelery, candy, presents, health and body care products, electronics, and office equipment. There are also a travel agency, a barber shop, a tailor and a dry cleaning service (Shoperade, n.d.; Winkeliersvereniging Winkelcentrum Osdorp, n.d.)

Overkapel, Utrecht

Shopping centre Overkapel is a recently redeveloped neighbourhood centre in the district of Overvecht in Utrecht.

The population in the direct surroundings of the centre exists for 48% of non-western immigrants and 7% of western immigrants. In 2010 the centre won the yearly prize for best shopping centre awarded by the Dutch Council of Shopping Centre (NRW). Part of the reason is the adjustment of the retail mix with local and ethnic retailers to match the profile of the population in the neighbourhood. The centre currently contains 14 units, including a Islamic butcher, Turkish bakery and Mediterranean fish shop (Overkapel Utrecht, 2010).

Conclusion

In the previous examples from practice attributes are adjusted to cater to ethnic consumers on three levels: the shopping centre, the store and the product assortment. The most important are the attributes related to functional performance. A difference can be made with retail or brand mix and the right product assortment that often contains a large deal of imported products or brands. Typical product categories are foods, books, CD's, DVD's, clothing, homeware, tableware, cosmetics, health supplements, and gift items. With regard to food, stores can hold a different proportion of fresh, canned and dried foods according to differences in food culture. There might also be greater assortment of meat, fish and patisserie, and in-store departments for on the spot and custom preparation. Another aspect can be the level of ripeness that is preferred for fruits and vegetables.

Also facilities and services can be different. Catering might offer typical ethnic foods and drinks or it can be different in concept (such as a tea bar in an Asian mall). In terms of leisure there can be an enhanced focus on certain target groups or on specific concepts. One example is a greater focus on entertainment for children in malls targeting Hispanics; another one is the presence of a karaoke bar or photo sticker store in an Asian-themed mall. Possible services on offer are DVD-rental, beauty and hair salons, travel service, recruitment service, banking services, dentist, health services, dry cleaning, and a delivery service. Those are all services that require intensive communication or are subject to cultural customs and constraints. Bilingual staff is therefore very important as well as bilingual signage and information provision. From a spatial-physical point of view the atmosphere, design and layout of the centre may be adjusted to match the preferences and lifestyle of a certain culture. The sizes of isles for example might be bigger to cater to cultures that prefer to shop with their whole family (ICSC, 2009).

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ANNEX 5

Interview roadmap

Introduction

- Introduce myself.
- Explain the goal of the interview, the structure and what is expected of the respondent.

Opening of interview

- Ask respondent to introduce him/herself.
- What is your daily occupation? Reason for living in the Netherlands?
- How long have you been living here?
- Where do you live? What is your household structure?

Shopping in the Netherlands

- Details on shopping pattern: How often do you shop? Daily / non-daily? Where?
- What is your attitude towards shopping in general?
- What is your attitude towards shopping in the Netherlands?
- What are your experiences with shopping in the Netherlands?
- How is shopping as an activity in the Netherlands different than in your home country? What is remarkable?
- How are shopping centres in the Netherlands different from those your home country? What is remarkable?
- Are there products or services from home that you miss in the Netherlands or that you can't find here? Do you bring products from home / visit expat shops / etc.)?

Keep in mind attributes: location/accessibility, parking, retail mix, opening hours, service by personnel, catering facilities, leisure, facilities and services, atmosphere, architecture and design, covered shopping, personal space and privacy, lay-out of the centre, etc.

Shopping in Stadshart Amstelveen (if applicable)

- Ask questions about attitude towards shopping in Stadshart Amstelveen and experiences. Ask for examples.
- How often do you shop in Stadshart Amstelveen? Daily / non-daily? Which shops?
- What is your attitude towards Stadshart Amstelveen? Keep in mind attributes.
- What things do you miss or should be changed in Stadshart Amstelveen in order to make it more attractive for you and other expats? (in terms of retailers, facilities, services)

Test questionnaire

- Ask to fill in questionnaire.
- Instruct respondent: "I will clock the time. Please note down comments and things you didn't understand, and provide me with feedback afterwards".
- Check if questionnaire is properly filled out.

Closing

- How did you feel about this interview? Do you have any further remarks?
- Do you know other people that I could interview?
- Thank respondent.

Overview respondents of in-depth interviews

Date	Ethnicity	Ethnic identification	Sex	Age	Household structure	Zip code	Time lived in the Netherlands:	Other countries lived in as expat:	Further remarks:
3-3-2010	Japanese	very strongly	M	45-54	- 2 person household - 1 child 10-18	2235 DS	6 years	4 years in USA	Lived for 2 years in Amstelveen
5-3-2010	American	strongly	F	45-54	- 1 person household - 1 child 5-9	1181 WN	6 years	n.a.	Is half American / half Spanish, but grew up in the USA
8-3-2010	American	moderately	F	25-34	- 2 person household	1058 LB	2,5 years	n.a.	Dutch partner
8-3-2010	American	strongly	F	25-34	- 2 person household	1053 VA	3 years	n.a.	Dutch partner
6-4-2010	Japanese	moderately	F	45-54	- 2 person household - 1 child 18+	1183	3 years	20 years in Germany	n.a.
6-4-2010	Japanese	strongly	F	45-54	- 2 person household - 1 child 10-18 - 1 child 18+	1186 ZN	5,5 years	n.a.	n.a.
6-4-2010	Japanese	moderately	F	35-44	- 2 person household - 1 child 5-9 - 1 child 10-18	1083 AJ	4,5 years	5 years in USA	Partner is half Japanese / half American
12-4-2010	British	moderately	M	35-44	- 2 person household	1016 HV	1,5 years	3 years in Russia	Works near Stadshart
15-4-2010	British	moderately	F	45-54	- 2 person household - 1 child 5-9 - 2 children 18+	1186 XM	2,5 years	n.a.	n.a.
21-4-2010	British	moderately	M	25-34	- 2 person household	1071 VB	4 months	4 years in Germany	Works near Stadshart and has a Polish partner
7-5-2010	American	very strongly	F	35-44	- 2 person household - 1 child 10-18	1013 BP	2 years		Dutch partner

ANNEX 7

Questionnaire (English)

Dear expat,

For my master thesis in Real Estate Management & Development at the Eindhoven University of Technology I am carrying out a research on the shopping behaviour of expats. It would be of great value to me if you could fill in this questionnaire. It will take approximately 10 minutes. Your information will be used for this study only, and will be treated confidentially. Among the participants 5 Bijenkorf-vouchers of €50 will be raffled.
Thanks in advance for your cooperation!

Kind regards,

Geri Wijnen
Student Real Estate Management & Development TU/e

CHOICE OF SHOPPING LOCATIONS
The following questions will be about your choice of shopping areas.

1. Please indicate which shopping venues you have visited in the last 12 months (see map)? Please answer the question for both daily shopping (food / personal care) and non-daily shopping (clothing / books / media / home ware, etc).	For daily shopping	For non-daily shopping
▪ Amsterdam city centre (Kalverstraat, Leidsestraat, etc.)	❑	❑
▪ Amsterdam Zuid (Beethovenstraat and around)	❑	❑
▪ PC Hoofstraat , Van Baerlestraat and around.	❑	❑
▪ Gelderlandplein	❑	❑
▪ Stadshart Amstelveen	❑	❑
▪ Hoofddorp city centre	❑	❑
▪ shopping centre Kostverloren	❑	❑
▪ shopping centre Groenhof	❑	❑
▪ shopping centre Middenhoven	❑	❑
▪ shopping centre Westwijk	❑	❑

2. In which shopping venue do you usually shop for daily products?	______________________
3. In which shopping venue do you usually shop for non-daily products?	______________________

4. Do you ever visit Stadshart Amstelveen?	❑ yes → continue with question 5 ❑ no → continue with question 7

5. In case you <u>do</u> visit Stadshart Amstelveen, what is usually your motivation to visit this shopping centre? Multiple answers are possible.

❑ funshopping	❑ to make a specific purchase	❑ to meet other people
❑ to look around	❑ to use a specific service (bank, post office)	❑ to eat or drink
❑ to visit the supermarket	❑ to visit a leisure facility (library, theatre)	❑ other: ________________

6. When do you usually visit Stadshart Amstelveen? Multiple answers are possible.

❑ during weekday mornings	❑ in combination with the Tuesday or Friday market
❑ during weekday afternoons	❑ during late night shopping
❑ during weekday lunches	❑ during weekends

7. In case you <u>don't</u> visit Stadshart Amstelveen, what is your motivation not to visit this shopping centre?

____

8. Please indicate the importance of the following aspects in your decision as where to shop?					
	Unimportant				Important
▪ location / accessibility of the centre	1	2	3	4	5
▪ parking facilities	1	2	3	4	5
▪ retail mix	1	2	3	4	5
▪ opening hours of stores	1	2	3	4	5
▪ catering facilities	1	2	3	4	5
▪ facilities and services (toilets / seating / baby care / child play area)	1	2	3	4	5
▪ service by personnel	1	2	3	4	5
▪ fashion and trend sensitivity	1	2	3	4	5
▪ promotions and events	1	2	3	4	5
▪ atmosphere of the centre	1	2	3	4	5
▪ design of the centre and public space	1	2	3	4	5
▪ covered shopping	1	2	3	4	5
▪ personal space and privacy	1	2	3	4	5
▪ orientation and way-finding	1	2	3	4	5

9. What sources of information do you use in your everyday life in the Netherlands (news, events, promotions)? Multiple answers are possible.	
❑ Dutch newspapers	❑ international radio
❑ international newspapers	❑ Dutch radio
❑ Dutch magazines	❑ local radio (e.g. Radio Decibel, RTV Amstelveen)
❑ international magazines	❑ newsletter of expat association
❑ internet	❑ free local papers and weeklies (e.g. Amstelveens Weekblad, Echo etc.)
❑ international TV	❑ door-to-door advertisement leaflets
❑ Dutch TV	❑ advertisement in public transport
❑ local TV (e.g. AT5, RTV Amstelveen)	

GENERAL SHOPPING PATTERN

The following questions will be about your general shopping pattern. Please fill in the following questions for the shopping venue you usually shop at (as you stated in question 2 and 3), compared to Stadshart Amstelveen. In case Stadshart Amstelveen is the venue you usually shop at, only fill in the column of Stadshart Amstelveen. In case you never shop at Stadshart Amstelveen, only fill in the column of Favourite shopping venue. Please answer all the questions for both daily shopping trips (food / personal care) and non-daily shopping trips (clothing / books / media / home ware, etc).

10. How often do you go shopping?			
Shopping trip for daily products in:		Shopping trip for non-daily products in:	
Favourite shopping venue	Stadshart Amstelveen	Favourite shopping venue	Stadshart Amstelveen
❑ daily	❑ daily	❑ daily	❑ daily
❑ 3-5 times a week	❑ 3-5 times a week	❑ 3-5 times a week	❑ 3-5 times a week
❑ 2 times a week	❑ 2 times a week	❑ 2 times a week	❑ 2 times a week
❑ once a week	❑ once a week	❑ once a week	❑ once a week
❑ once in 2 weeks	❑ once in 2 weeks	❑ once in 2 weeks	❑ once in 2 weeks
❑ once a month	❑ once a month	❑ once a month	❑ once a month
❑ once in 2 months	❑ once in 2 months	❑ once in 2 months	❑ once in 2 months
❑ once in 6 months	❑ once in 6 months	❑ once in 6 months	❑ once in 6 months
❑ once a year	❑ once a year	❑ once a year	❑ once a year
❑ less often	❑ less often	❑ less often	❑ less often

11. In which store do you spend the most money during your shopping trip? Please name the store for each of the following product categories.		
	In favourite shopping venue:	in Stadshart Amstelveen:
Food		
Personal care		
Clothing		
Books and media		
Home ware		

12. In which catering facility do you spend the most money during your shopping trip?	
In favourite shopping venue:	in Stadshart Amstelveen:

13. Are there products/brands from your home-country that you can't find in regular Dutch stores (and therefore buy elsewhere)? Please indicate for each category which products you can't find, and if you buy these elsewhere: where you buy them. Multiple answers are possible.		
	What products/brands?	In which shop or website?
Food		
Personal care		
Clothing		
Books and media		
Home ware		

14. What are your 3 favourite fashion brands (e.g. clothing, shoes, lingerie, etc.)? These may be brands from anywhere in the world, including your home country.	1. ______________________________ 2. ______________________________ 3. ______________________________

SATISFACTION REGARDING STADSHART AMSTELVEEN

The following questions will be about your satisfaction regarding Stadshart Amstelveen.

15. Please indicate your overall level of satisfaction regarding Stadshart Amstelveen by giving a mark between 1 and 10 (1 = completely unsatisfactory, 10 = completely satisfactory).	_____

16. Please indicate to what extent you are satisfied with the following aspects in Stadshart Amstelveen.					
	completely unsatisfied				completely satisfied
▪ location / accessibility of the centre	1	2	3	4	5
▪ parking facilities	1	2	3	4	5
▪ retail mix	1	2	3	4	5
▪ opening hours of stores	1	2	3	4	5
▪ catering facilities	1	2	3	4	5
▪ facilities and services (toilets / seating / baby care / child play area)	1	2	3	4	5
▪ service by personnel	1	2	3	4	5
▪ fashion and trend sensitivity	1	2	3	4	5
▪ promotions and events	1	2	3	4	5
▪ atmosphere of the centre	1	2	3	4	5
▪ design of the centre and public space	1	2	3	4	5
▪ covered shopping	1	2	3	4	5
▪ personal space and privacy	1	2	3	4	5
▪ orientation and way-finding	1	2	3	4	5

17. What shops or shop types do you miss in Stadshart Amstelveen or would be a good addition?
____

18. What facilities and/or services do you miss in Stadshart Amstelveen?
____

19. Do you have any recommendations to make Stadshart Amstelveen more attractive for you to visit?
____

20. If the following shops, services or facilities would be present in Stadshart Amstelveen, which of them would you use? Multiple answers are possible.	
❑ Special supermarket selling Japanese / US / UK products	❑ Delivery service
❑ Convenience store (with foods/magazines, like 7-Eleven)	❑ Customer card or loyalty scheme
❑ Service corner (dry cleaning, post office, pharmacy)	❑ Fitness club
❑ Extended opening hours (during nights / Sundays)	

PERSONAL VALUES AND ATTITUDES

The following questions will be about your personal values and attitudes in life.

21. Please indicate what your attitude is towards shopping in general by reacting on the following statements.					
	completely disagree				completely agree
▪ The time required for shopping has a big influence on my shopping experience	1	2	3	4	5
▪ A store visit is good when it is over very quickly.	1	2	3	4	5
▪ Shopping trips are truly a joy.	1	2	3	4	5
▪ I enjoy shopping trips for its own sake, not just for the items I may purchase.	1	2	3	4	5
▪ Shopping trips truly feel like an escape.	1	2	3	4	5
▪ While shopping, I am able to forget my problems.	1	2	3	4	5
▪ I prefer to visit stores that have high reliability for product.	1	2	3	4	5
▪ A store is good because it has many well-known brands.	1	2	3	4	5
▪ While shopping I feel self-conscious.	1	2	3	4	5
▪ I identify myself with the store that I am shopping in.	1	2	3	4	5

22. Please indicate the <u>three</u> values that are most important to you <u>in your personal life</u> by distributing the grades 1 to 3 among three values below? (1 = 'most important', 2 = 'second most important', 3 = 'third most important').	
_______ Sense of belonging	_______ Being well-respected
_______ Excitement	_______ Sense of accomplishment
_______ Fun and enjoyment in life	_______ Security
_______ Warm relations with others	_______ Self-respect
_______ Self-fulfillment	

BACKGROUND INFORMATION

The following questions will be about your demographical characteristics.

23. What is your cultural background?	
❑ American	❑ Japanese
❑ British	❑ other: ______________________________

24. How strongly do you relate to your cultural background?				
❑ very weakly	❑ weakly	❑ moderately	❑ strongly	❑ very strongly

25. What is your gender?	❑ male	❑ female

26. What is your age?		
❑ 20-24 years	❑ 35-44 years	❑ 55-64 years
❑ 25-34 years	❑ 45-54 years	❑ ≥ 65 years

27. What is your highest level of education?		
❑ none	❑ secondary education	❑ university education or higher
❑ primary education	❑ professional education	❑ do not want to say

28. How many persons are there in your household (including yourself)?
____ men ____ women ____ children (age 0-4) ____ children (age 5-9) ____ children (age 10-18)

29. Which daily occupation applies most to you?			
❑ full time job	❑ autonomous	❑ retired	❑ other:_______________
❑ part time job	❑ student	❑ house wife / man	

30. The average net household income per month in the Netherlands lies between € 1900 and €2600. Please indicate the total monthly net income of your household (of you and your partner together).		
❑ less than €1.300	❑ ≥ €1.900 - €2.600	❑ ≥ €3.500
❑ ≥ €1.300 - €1.900	❑ ≥ €2.600- €3.500	❑ do not want to say

31. For how long have you lived in the region of Amsterdam or Amstelveen?	__________________________ year(s)
32. What is your zip code?	________________________________

33. How were you notified about this questionnaire?	
❑ via school	❑ via Facebook / Twitter
❑ via company	❑ via Expatica.com
❑ via expat association	❑ other: ______________________________

OTHER

34. Do you have any further remarks?
____
____

35. In the third phase of the study I will do some accompanied shopping trips with expats. I will then accompany you during a shopping trip for observation. If you are interested in participation and want to receive more information about this, please leave your phone number or email address here:
____

36. If you want to have a chance on winning one of the Bijenkorf-vouchers of €50 that will be raffled among the participants of this survey, please fill in your address here.
____
____

THANK YOU FOR YOUR COOPERATION!

Questionnaire (Japanese)

在蘭日本人の皆様 エインド・ホーヘン科学技術大学の不動産経営・開発科（Eindhoven University of Technology）における修士論文のため、海外在住者の買い物行動についての調査を行っています。お忙しい中恐れ入りますが、こちらのアンケートにご協力いただけると幸いです。所要時間は約１０分です。なお、こちらに記載していただいた情報は、内密に処理され、研究のためのみに用いられます。ご協力いただいた方の中から、抽選で５名様にBijenkorfデパート の５０ユーロ分の商品券が当たります。どうぞよろしくお願いいたします。 エインド・ホーヘン大学　不動産経営・開発科　修士課程学生 ヒエリ・ウェイネン（Geri Wijnen）

<u>買い物場所の選択</u>
以下の質問は、買い物をする地域についての質問です。

1. あなたが過去１年以内に訪れたショッピング・エリアを教えてください。（地図を参照） なお、普段の買い物（食料品、身の回り用品〔シャンプー、化粧品など〕）、その他の買い物（洋服、CD・DVD、本・雑誌・新聞、インテリアなど）の両方についてお答えください。	普段の買い物	その他の買い物
▪ アムステルダムの中心街（Amsterdam city centre）〔Kalverstraat, Leidsestraat など〕	❑	❑
▪ アムステルダム・ザウド（Amsterdam Zuid）〔Beethovenstraat 周辺〕	❑	❑
▪ PCホーフ・ストラート（PC Hoofstraat）ヴァン・バエル・ストラート（ Van Baerlestraat） 周辺	❑	❑
▪ ゲルデルランド・プレイン（Gelderlandplein）	❑	❑
▪ スタッズハルト・アムステルフェーン（Stadshart Amstelveen）	❑	❑
▪ ホーフドルプの中心街（Hoofddorp city centre）	❑	❑
▪ コストヴァーコーレン（Kostverloren）のショッピング・センター	❑	❑
▪ グロンホフ（Groenhof） のショッピング・センター	❑	❑
▪ ミッドホーヴェン（Middenhoven ）のショッピング・センター	❑	❑
▪ ウェストウェイク（Westwijk） のショッピング・センター	❑	❑

2. よく日用品を買うショッピング・エリアはどこですか？	________________
3. よく日用品以外を買うショッピング・エリアはどこですか？	________________

4. スタッズハード・アムステルフェーン（Stadshart Amstelveen）へ行ったことがありますか?	❑ はい — 質問 5へ ❑ いいえ — 質問 7へ

5. スタッズハート・アムステルフェーンに行く理由は、たいていどれですか？複数回答可。		
❑ 楽しむための買い物 ❑ ウィンドウ・ショップス ❑ スーパーマーケットに行くため	❑ 何か特定のものを買うため ❑ 何か特定のサービス（銀行・郵便局など）を利用するため ❑ 娯楽施設（図書室・劇場）を利用するため	❑ 誰かに会うため ❑ 飲食のため ❑ その他 ____________

6. 大抵いつスタッズハート・アムステルフェーンへ行きますか？複数回答可。	
❑ 平日の午前中	❑ 火曜日と金曜日の市場にあわせて
❑ 平日の午後	❑ ショッピング・ナイトの時
❑ 平日の昼休み	❑ 週末

7. スタッズハート・アムステルフェーンに行かない方にお聞きします。その理由は何ですか？
____

8. どこへ買い物に行くか決めるとき、以下の事項はどのくらい重要ですか？					
	重要でない				重要である
▪ 場所、中心街へのアクセス	1	2	3	4	5
▪ 駐車場の設備	1	2	3	4	5
▪ 小売ミックス（品揃え、販売促進及びサービス、雰囲気、価格、立地などの諸要素 ）	1	2	3	4	5
▪ 店の営業時間	1	2	3	4	5
▪ 飲食設備	1	2	3	4	5
▪ 設備とサービス（トイレ・席・ベビー・ケア、子供が遊べる場所）	1	2	3	4	5
▪ 店員のサービス	1	2	3	4	5
▪ 流行に敏感かどうか	1	2	3	4	5
▪ 販売促進・イベント	1	2	3	4	5
▪ 中心街の雰囲気	1	2	3	4	5
▪ 中心街や公共空間のデザイン	1	2	3	4	5
▪ アーケード商店街（屋根の有無）	1	2	3	4	5
▪ 個人的空間・プライバシー	1	2	3	4	5
▪ 方向・道路標識	1	2	3	4	5

9. オランダでの日常生活においての情報源（ニュース、イベント、販売促進についての）は何ですか？複数回答可。	
❑ オランダ語の新聞	❑ インターナショナル・ラジオ
❑ 国際新聞（オランダ語以外の新聞）	❑ オランダ語のラジオ
❑ オランダ語の雑誌D	❑ ラジオの地域放送（Radio Decibel, RTV Amstelveenなど）
❑ 国際雑誌（オランダ語以外の雑誌）	❑ 海外在住者向けのニュース・レター
❑ インターネット	❑ 無料新聞・雑誌 （ Amstelveens Weekblad, Echo など）
❑ テレビの国際放送（オランダ語以外の放送）	❑ 郵便受けに入っている広告
❑ オランダ語のテレビ	❑ 公共交通機関の広告
❑ テレビの地域放送（ AT5, RTV Amstelveenなど）	

通常の買い物のパターンについて

次の質問は、普段の買い物のパターンについてです。いつも買い物をする場所についての質問にお答えください。（質問2や３と同様です）
もしスタッズハート・アムステルフェーンでいつも買い物をするなら、スタッズハート・アムステルフェーンの欄のみにお答えください。もしそこで一度も買い物をしたことがない場合は、お気に入りのショッピング・エリアについてお答えください。日常品（食べ物）、その他のもの（服、本、CD・DVD、インテリアなど）の両方についてお願いします。

10. どのくらいの頻度で買い物をしますか？			
日用品のショッピングをする場所		日用品でないもののショッピングをする場所	
お気に入りのショッピング・エリア	スタッズハート・アムスフェーン	お気に入りのショッピングエリア	スタッズハート・アムスフェーン
❑ 毎日 ❑ 週に３～５回 ❑ 週に２回 ❑ 週に１回 ❑ ２週間に１回 ❑ １ヶ月に１回 ❑ ２ヶ月に１回 ❑ ６ヶ月に１回 ❑ １年に１回 ❑ それ以下	❑ 毎日 ❑ 週に３～５回 ❑ 週に２回 ❑ 週に１回 ❑ ２週間に１回 ❑ １ヶ月に１回 ❑ ２ヶ月に１回 ❑ ６ヶ月に１回 ❑ １年に１回 ❑ それ以下	❑ 毎日 ❑ 週に３～５回 ❑ 週に２回 ❑ 週に１回 ❑ ２週間に１回 ❑ １ヶ月に１回 ❑ ２ヶ月に１回 ❑ ６ヶ月に１回 ❑ １年に１回 ❑ それ以下	❑ 毎日 ❑ 週に３～５回 ❑ 週に２回 ❑ 週に１回 ❑ ２週間に１回 ❑ １ヶ月に１回 ❑ ２ヶ月に１回 ❑ ６ヶ月に１回 ❑ １年に１回 ❑ それ以下

11. ショッピングのとき、一番お金を使うのはどのお店ですか？次の買い物のカテゴリーに分けて、店名をお答えください。		
	お気に入りのショッピング・エリアで	スタッズハート・アムスフェーンで
食べ物		
身の回り品		
服、靴、かばんなど		
本・雑誌・新聞、CD, DVD		
インテリア用品		

12. 買い物の間、どの飲食店を一番利用しますか？	
お気に入りのショッピング・エリアにて	スタッズハート・アムステルフェーンにて

13. 日本にある製品／ブランドで、一般のオランダの店にないため、別のところで買っているものがありますか？一般のオランダの店にない、その<u>製品名</u>を教えてください。また、別のところで買っているという場合、<u>どこで</u>購入していますか？複数回答可		
	製品・ブランド名	どの店、またはインターネットのサイトで購入しているか
食べ物		
身の回り品		
服、靴、かばんなど		
本・雑誌・新聞、CD・DVDなど		
インテリア用品		

14. あなたのお気に入りのファッション・ブランド（服、下着、靴など）、３つを教えてください。日本を含め、どの国のブランドでもかまいません。	1. ______________________________ 2. ______________________________ 3. ______________________________

スタッヅハート・アムステルフェーンに関する満足度
次の質問は、スタッヅハート・アムステルフェーンに関する満足度についてです。

15. あなたはスタッズハート・アムスフェーンにどれくらい満足していますか？１～１０でお答えてください（１＝完全に不満足　１０＝完全に満足）	____

16. 次のスタッズハート・アムスフェーンの各項目に、どれだけ満足ですか？					
	完全に不満足				完全に満足
▪ 場所、中心街へのアクセス	1	2	3	4	5
▪ 駐車場の設備	1	2	3	4	5
▪ 小売ミックス（品揃え、販売促進及びサービス、雰囲気、価格、立地などの諸要素 ）	1	2	3	4	5
▪ 店の営業時間	1	2	3	4	5
▪ 飲食設備	1	2	3	4	5
▪ 設備とサービス（トイレ・席・ベビー・ケア、子供が遊べる場所）	1	2	3	4	5
▪ 店員のサービス	1	2	3	4	5
▪ 流行に敏感かどうか	1	2	3	4	5
▪ 販売促進・イベント	1	2	3	4	5
▪ 中心街の雰囲気	1	2	3	4	5
▪ 中心街や公共空間のデザイン	1	2	3	4	5
▪ アーケード商店街（屋根の有無）	1	2	3	4	5
▪ 個人的空間・プライバシー	1	2	3	4	5
▪ 方向・道路標識	1	2	3	4	5

17. どのような店、あるいは店の種類がスタッヅハート・アムステルフェーンに欠けていると思いますか？

____

18. スタッズハート・アムステルフェーンにあったらいいなと思う設備・サービスはなんですか？

____

19. スタッズハート・アムステルフェーンをもっとあなたにとって魅力あるものにするため、何かお勧めしたいことはありますか？

____

20. もし次のようなサービス・設備がスタッズハート・アムステルフェーンにあったら、どれを利用しますか？複数回答可。	
❑ 日本食材を扱う特別なスーパー	❑ 宅配サービス
❑ コンビニ(食べ物、雑誌など。セブンイレブンのような)	❑ カスタマー・カードまたはお得意様への特別サービス
❑ サービス・コーナー（ドライ・クリーニング、郵便局、薬局）	❑ フィットネス・クラブ
❑ 営業時間の延長（夜、日曜日）	

個人的価値観・態度

次の質問は、あなたの生活における個人的価値観・態度についての質問です。

21. あなたの普段の買い物に対する態度について、お聞きします。次の意見についてどのくらい賛成・反対かお答えください。					
	完全に不賛成				完全に賛成
▪ 買い物にかかる時間は、買い物にとても影響する。	1	2	3	4	5
▪ 店にいる時間は、とても短いのが良い。	1	2	3	4	5
▪ ショッピングはとても楽しい。	1	2	3	4	5
▪ 私は、買う商品のためだけでなく、ショッピング自体を楽しい。	1	2	3	4	5
▪ ショッピングは、一種の逃避である。	1	2	3	4	5
▪ ショッピングの間、悩みごとを忘れることができる。	1	2	3	4	5
▪ 私は商品の信頼性が高いお店を好む。	1	2	3	4	5
▪ ブランド物がたくさん置いてある店が良い。	1	2	3	4	5
▪ 買い物の間、自意識を感じる。	1	2	3	4	5
▪ 買い物をしている店と、自分自身に一体感を覚える。	1	2	3	4	5

22. 次の中で、あなたの<u>個人生活</u>において最も重要な<u>３つ</u>を選択してください。なお、その３つには順序を示す番号を書いてください（１＝最も重要、２＝二番目に重要　３＝三番目に重要）	
______ 帰属意識	______ 尊敬されると
______ わくわく感・刺激	______ 達成感
______ 生活の喜び・楽しみ	______ 安全
______ あたたかい人間関係	______ 自尊心
______ 自己満足	

経歴の情報

次の質問は、あなたの地域的な経歴についてです。

23. あなたの文化的背景はどれですか？	
❑ アメリカ	❑ 日本
❑ イギリス	❑ その他: ______________________

24. あなたの文化的背景に、あなたはどのくらい関わっていますか？				
❑ とても弱く	❑ 弱く	❑ 中くらいに	❑ 強く	❑ とても強く

25. あなたの性別は？	❑ 男性	❑ 女性

26. おいくつですか？		
❑ 20-24 歳	❑ 35-44 歳	❑ 55-64 歳
❑ 25-34 歳	❑ 45-54 歳	❑ 65 歳以上

27. あなたの最終学歴は何ですか？		
❑ なし	❑ 高校	❑ 大学、または大学院以上
❑ 小学校・中学校	❑ 専門教育	❑ 言いたくありません

29. あなたのご職業は、どれに最も当てはまりますか？			
❑ 正社員 ❑ パート・アルバイト	❑ 自営業 ❑ 学生	❑ 引退済み ❑ 主婦・主夫	❑ その他:____________

30. オランダの家庭の平均月収は、１９００ユーロから２６００ユーロです。あなたのご家庭の月収は、手取りでおいくらですか？（あなたと配偶者の収入の合計）		
❑ €1.300未満 ❑ €1.300 から€1.900	❑ €1.900 から €2.600 ❑ €2.600から€3.500	❑ €3.500以上 ❑ 言いたくありません

31. アムステルダム、またはアムステルフェーンにどのくらいお住まいですか？	______________________ 年
32. あなたの郵便番号は何ですか	___________________________

33. どのような経緯で、こちらのアンケートに協力してくださいましたか？	
❑ 学校で ❑ 会社で ❑ 海外在住者の組織で	❑ Facebook、 Twitterで ❑ ”Expatica.com”で ❑ その他: ___________________________

その他

34. 何かご意見がありましたら、お願いします。
____ ____

35. 私の研究の第三段階として、買い物の様子を観察する予定です。もし差し支えなければ、お買い物の際に同行させていただければと思います。もしこちらの研究の参加にご興味があり、詳細をご希望でしたら、こちらに電話番号、またはEメールアドレスをお願いします。
____

36. Bijenkorf商品券５０ユーロ分の抽選に参加ご希望の場合は、こちらに住所をお書きください。
____ ____

ご協力ありがとうございました。

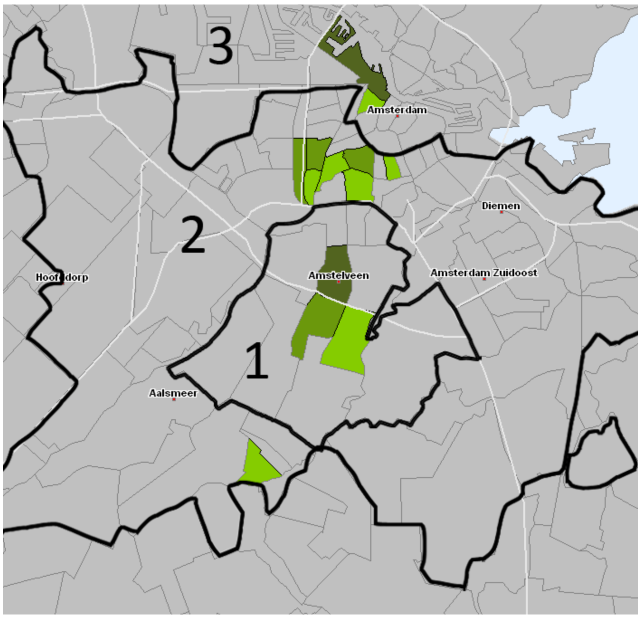
Distribution channels

Distribution channel	Method of distribution
International School of Amsterdam	Notification in weekly newsletter with link
British Association of Amsterdam	Notification on website and in monthly bulletin
Japanese School of Amsterdam	Notification in 2-weekly paper newsletter
Compananny Schiphol-Rijk childcare	Notification in newsletter
Website of Stadshart Amstelveen	Notification on English web page
www.expatica.com	Notification on forum
www.elynx.nl	Notification on forum
www.expat-exchange.com	Notification on forum
www.expatfocus.com	Notification on forum
www.baibainet.com	Notification on business advertisement page
15 expats via own network	E-mail
Amsterdam International Community School	Hand out paper surveys during parents' coffee morning
Tulip Gakuen Kleuterschool	Hand out flyers at school entrance
Around Kostverlorenhof	Hand out flyers at entrance of DIRK and AH
European Professional Women's Club	Hand out flyers during informal drink
Absolutely British Supermarket - Kostverlorenhof	Flyers inside shop
Japan Bookshop - Kostverlorenhof	Flyers inside shop
Japanese food shop 'Iseya' - Kostverlorenhof	Flyers inside shop
Japanese food shop 'Shilla' - Gelderlandplein	Flyers inside shop
Sushi Yaah - Stadshart Amstelveen	Flyers inside shop
Restaurant Tanuki - Stadshart Amstelveenk	Flyers inside restaurant

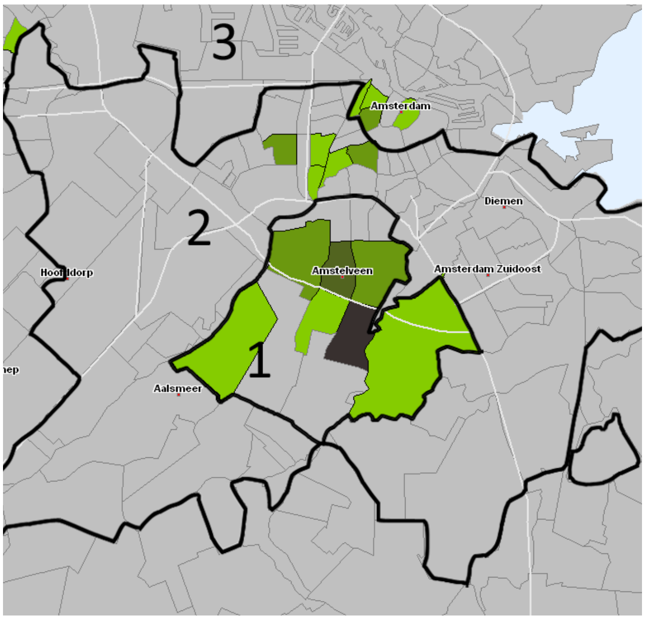
ANNEX 10

Respondents per culture by catchment area

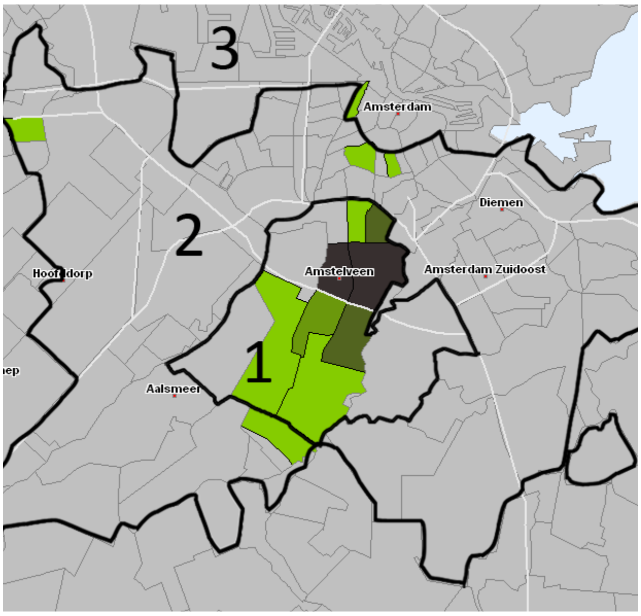
Americans



British



Japanese



- 1 respondent
- 2 respondents
- 3 respondents
- 4 or more respondents

ANNEX 11

Factor analyses

Shopping values

		Total			American			British			Japanese		
		1. hedonic	2. utilitarian	3. reliability	1	2	3	1	2	3	1	2	3
eff	The time required for shopping has a big influence on my shopping experience	-.196	**.623**	-.166	-.167	**-.413**	.208	.025	**.669**	.219	.308	**-.415**	-.278
eff	A store visit is good when it is over very quickly	**-.524**	**.602**	-.068	**-.441**	**.561**	-.056	-.010	**.890**	-.056	.062	**-.766**	.053
exp	Shopping trips are truly a joy	**.817**	-.082	.197	**.788**	-.029	-.190	**.841**	-.170	.012	**.468**	**.739**	-.031
exp	I enjoy shopping trips for its own sake, not just for the items I may purchase	**.825**	-.150	.215	**.751**	-.348	.102	**.596**	**-.539**	**.471**	.230	**.772**	-.068
div	Shopping trips truly feel like an escape	.825	**.211**	-.024	.905	**-.011**	.079	.824	**.119**	.350	.624	**.256**	-.420
div	While shopping, I am able to forget my problems	**.779**	**.337**	-.095	**.862**	**.304**	.052	.813	**.143**	.067	.774	**.067**	-.398
rel	I prefer to visit stores that have high reliability for product	.081	.072	**.899**	.122	-.110	**.864**	.023	.255	**.755**	.106	-.021	**.906**
rel	A store is good because it has many well-known brands	.094	**.598**	**.420**	-.066	.241	**.788**	.211	.265	**.662**	**.631**	-.001	.168
self	While shopping I feel self-conscious	.252	**.672**	.132	-.374	**.797**	.319	.012	**.582**	.081	.746	**.114**	-.044
self	I identify myself with the store that I am shopping in	**.377**	**.590**	.176	**.154**	**.842**	.202	.137	**-.182**	.693	.797	**.061**	.122
	Eigenvalues	3.22	2.45	0.99	3.31	2.20	1.38	3.12	2.17	1.17	3.41	1.64	1.19
	% of variance	32.22	56.70	66.60	33.06	21.96	13.78	31.24	21.72	11.69	34.07	16.37	11.88
	Cronbach's α	.60	.62	.35									

Importance

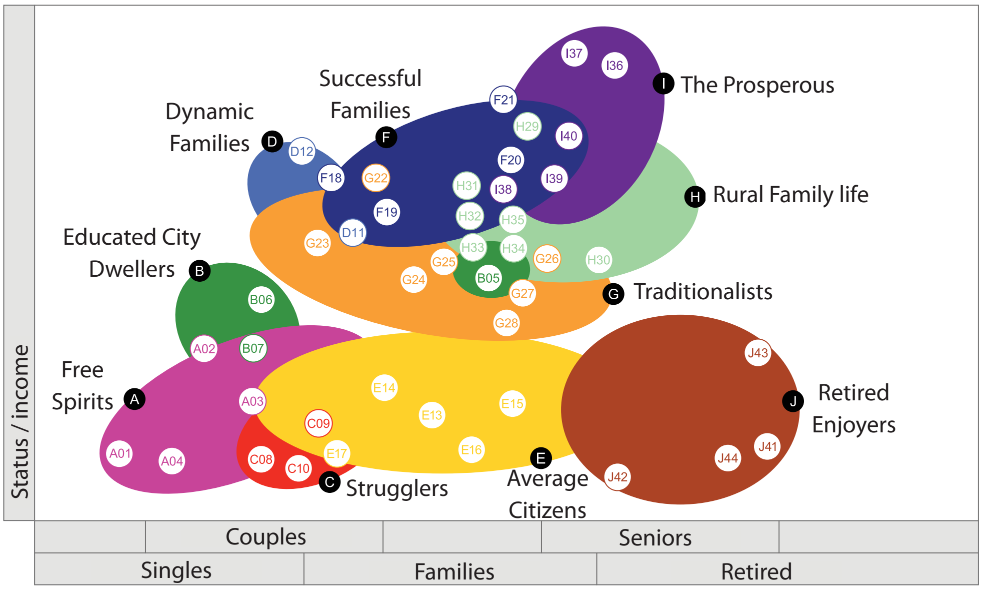
		Total				American				British				Japanese			
		1. functionality / space perception	2. identity	3. fundamental	4. parking	1	2	3	4	1	2	3	4	1	2	3	4
attributes	location / accessibility of the centre	-.206	.227	**.575**	-.175	.274	-.039	-.077	**.910**	.078	-.269	.197	**.813**	-.071	**.542**	-.195	**.498**
attributes	parking facilities	.018	.029	-.011	**.895**	**.614**	-.247	-.056	**-.569**	**.804**	.002	.014	.107	.369	.146	**-.662**	.086
attributes	retail mix	.173	.019	**.658**	.377	**.600**	.324	.286	.384	.039	.007	**.757**	.033	-.071	-.081	.038	**.905**
attributes	opening hours of stores	**.562**	-.137	**.482**	-.129	**.463**	-.124	.367	.055	.113	-.125	**.732**	.087	.104	.056	**.575**	.369
attributes	catering facilities	**.584**	.093	-.048	.056	.036	.013	**.920**	-.086	.400	-.115	.130	**-.571**	.161	.280	**.809**	-.033
attributes	facilities and services	**.601**	.138	.048	**.440**	.263	.121	**.871**	.068	**.849**	.148	.005	-.045	**.698**	-.026	-.060	.230
attributes	service by personnel	.208	**.428**	**.483**	-.012	**.618**	.320	.238	.020	-.043	**.724**	.334	-.262	.203	**.628**	.090	.328
attributes	fashion and trend sensitivity	.059	**.638**	.184	.090	-.072	**.860**	.151	.063	.231	.249	**.726**	.144	.088	**.724**	.064	-.057
attributes	promotions and events	.147	**.770**	-.228	-.022	.112	**.860**	-.216	-.123	.055	.343	.180	**.718**	**.845**	.153	.094	-.107
attributes	atmosphere of the centre	.144	**.747**	.260	.063	**.476**	**.647**	.103	.273	.089	**.898**	-.075	.147	**.559**	**.639**	.152	-.050
attributes	design of the centre and public space	.347	**.728**	.125	-.040	**.526**	**.627**	.231	.156	.201	**.792**	-.060	.113	**.758**	.303	.238	-.176
attributes	covered shopping	**.663**	.145	.168	.071	**.668**	.120	.181	.265	**.677**	.147	**.404**	-.164	.258	**-.585**	.095	.169
attributes	personal space and privacy	**.782**	.199	-.016	-.097	**.829**	.021	.005	-.071	**.820**	.025	.034	-.044	.191	-.112	**.822**	-.080
attributes	orientation and way-finding	**.653**	.327	.015	.089	**.749**	.256	.063	.186	**.721**	.100	.309	-.002	**.817**	-.226	.012	-.050
	Eigenvalues	4.03	1.61	1.22	1.12	5.08	2.01	1.57	1.31	3.98	2.13	1.88	1.39	3.60	2.10	1.98	1.38
	% of variance	28.77	11.51	8.68	7.96	36.31	14.35	11.18	9.35	28.39	15.24	13.45	9.92	25.72	15.01	14.12	9.83
	Cronbach's α	.76	.77	.44	.05												

Satisfaction

		Total				American				British				Japanese			
		1. identity	2. space perception	3. functionality	4. fundamental	1	2	3	4	1	2	3	4	1	2	3	4
attributes	location / accessibility of the centre	.022	.211	.001	**.775**	-.065	.083	.150	**.811**	.133	**.618**	**.505**	.092	.162	.099	.140	**.890**
attributes	parking facilities	.132	.236	.178	**.668**	.167	-.132	.014	**.860**	**.808**	.181	.244	.161	-.107	.215	**.788**	.376
attributes	retail mix	**.466**	-.177	**.405**	**.506**	**.879**	.035	.057	.158	.202	**.906**	.075	.079	.175	**.497**	.159	.121
attributes	opening hours of stores	.224	.022	**.738**	.292	**.773**	.391	.046	-.010	.239	**.691**	.150	.307	.001	**.896**	.160	.170
attributes	catering facilities	.310	.225	**.766**	.082	**.505**	**.775**	.131	.034	**.440**	.234	.215	**.755**	.316	**.850**	.149	-.015
attributes	facilities and services	.068	**.420**	**.676**	.030	.245	**.850**	.136	-.210	**.653**	.003	.456	.400	.351	**.469**	.026	**.493**
attributes	service by personnel	**.425**	**.412**	**.442**	-.118	**.559**	.261	**.640**	.151	.313	.055	**.839**	.130	**.829**	.362	-.012	-.068
attributes	fashion and trend sensitivity	**.770**	-.062	.388	-.033	**.758**	.279	.334	-.191	.078	**.470**	**.752**	-.008	.106	**.606**	**.536**	-.402
attributes	promotions and events	**.635**	.395	.331	.009	.292	**.775**	-.003	-.053	**.761**	.188	.159	.194	**.862**	.175	.252	.016
attributes	atmosphere of the centre	**.803**	.272	.055	.259	**.604**	.393	.327	.059	**.896**	.169	.058	.176	.296	.049	**.906**	.096
attributes	design of the centre and public space	**.612**	**.444**	.105	.281	.281	.112	**.853**	-.169	**.774**	.170	.089	.394	.261	.282	**.801**	-.083
attributes	covered shopping	.152	**.804**	.059	.205	-.094	-.002	**.875**	.185	**.691**	.092	.356	.332	**.689**	-.114	.160	.277
attributes	personal space and privacy	**.438**	**.612**	.178	.237	.310	.224	**.654**	.244	**.882**	.223	.097	.179	**.717**	.115	.141	.201
attributes	orientation and way-finding	.064	**.655**	.344	.215	-.087	.727	.294	**.412**	.347	.178	.003	**.885**	**.673**	**.440**	.042	.010
	Eigenvalues	5.81	1.38	1.12	1.01	5.86	2.12	1.48	1.31	7.48	1.75	1.07	0.80	5.52	1.94	1.55	1.30
	% of variance	41.50	9.88	7.98	7.21	41.86	15.13	10.55	9.39	53.43	12.50	7.61	5.70	39.41	13.86	11.07	9.26
	Cronbach's α	.85	.81	.78	.58												

ANNEX 11

MOSAIC households by Experian (2009)



Most frequently occuring groups among expatriates

A - Free Spirits

Socio-demographic:

- Age: up to 34
- Mostly single
- High education
- Below average income
- Students and starters

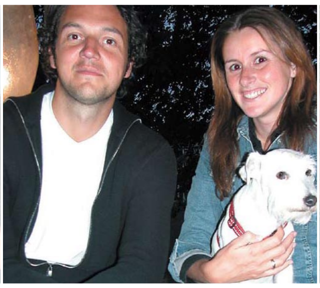
Mentality

- Excitement
- Independence
- Equality and respect

Interests:

- Social network
- Visit cafés
- Music, TV and DVD
- Socially involved

B - Educated City Dwellers



Socio-demographic:

- Age: 25-34
- Single or living together
- High education
- Average income
- At the start of their career

Mentality

- Comfortable life
- Freedom
- Fun

Interests:

- Art and culture
- Reading
- Going to the cinema
- Highly socially involved

F - Successful families

Socio-demographic:

- Age: 35-45
- Kids in the age 12-18
- Average to high education
- High income
- Expensive owned house

Mentality

- Respect
- Safety for family
- Well-mannered, polite

Interests:

- Stock exchange
- Family activities
- Charity
- Gardening
- Pets

I - The Prosperous

Socio-demographic:

- Age: 55-64
- Empty nesters
- High education
- Top income
- Expensive owned house

Mentality

- Comfortable life
- Fun
- Excitement

Interests:

- Luxury
- Stock exchange
- Garding
- Charity
- Going to the theatre

Most frequently occuring types among expatriates

A02 - Active Youngsters

Socio-demographic:
- Age: up to 34
- Living alone
- Middle to high education
- Below average income
- Rented apartment

Mentality
- Independence
- No commitments
- Personal development

Interests:
- Art, culture and history
- City trips
- Socially involved

B05 - Culture Lovers

Socio-demographic:
- Age: 65+
- Empty nesters
- High education
- High income or pension
- Upscale apartment

Mentality
- Comfortable life
- Personal development
- Highly socially involved

Interests:
- Culture
- Antiques
- Going to the theatre

F21 - Opiniatives

Socio-demographic:
- Age: 35-64
- Kids in the age 6 to 16
- High education
- Above average income
- Terraced corner house

Mentality
- Comfortable life
- No restrictions
- Independence

Interests:
- Holidays
- Charity
- Stock exchange

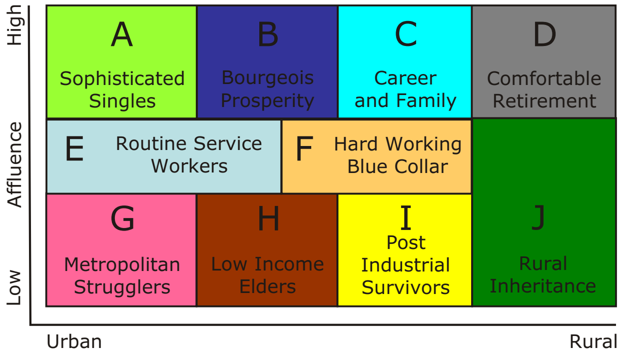
I38 - Fortunate Cosmopolitans

Socio-demographic:
- Age: mostly 50+
- No family
- High education
- High income

Mentality
- Internationally oriented
- Ambitious
- Erudite

Interests:
- Art and culture
- Antiques
- Stock exchange

MOSAIC Global by Experian (2008)



Most frequently occuring groups among expatriates:

Sophisticated Singles (covers Free Spirits and B06, B07)

Sophisticated Singles contains young people, mostly single and well educated, who positively enjoy the variety and stimulation afforded by life in large cities. Typically international in their outlook and with a rich network of personal contacts, they are quick to explore and adopt new social and political attitudes and are important agents of innovation, both in terms of lifestyles and the adoption of consumer products. Most are at the stage of their lives when the development of 'human' capital, i.e. skills, contacts, knowledge, continue to take precedence over the maximization of their incomes or indeed the accumulation of financial assets and much of their income is spent on 'experiences', such as entertainment, eating out, travel, books and magazines, rather than on equipment. They exhibit a variety of household arrangements and typically marry and have children late in their lives. Such people gravitate towards the smarter downtown areas of major cities where they spend short periods of time living in small, rented apartments.

Bourgeois Prosperity (covers the Prosperous and F20, F21)

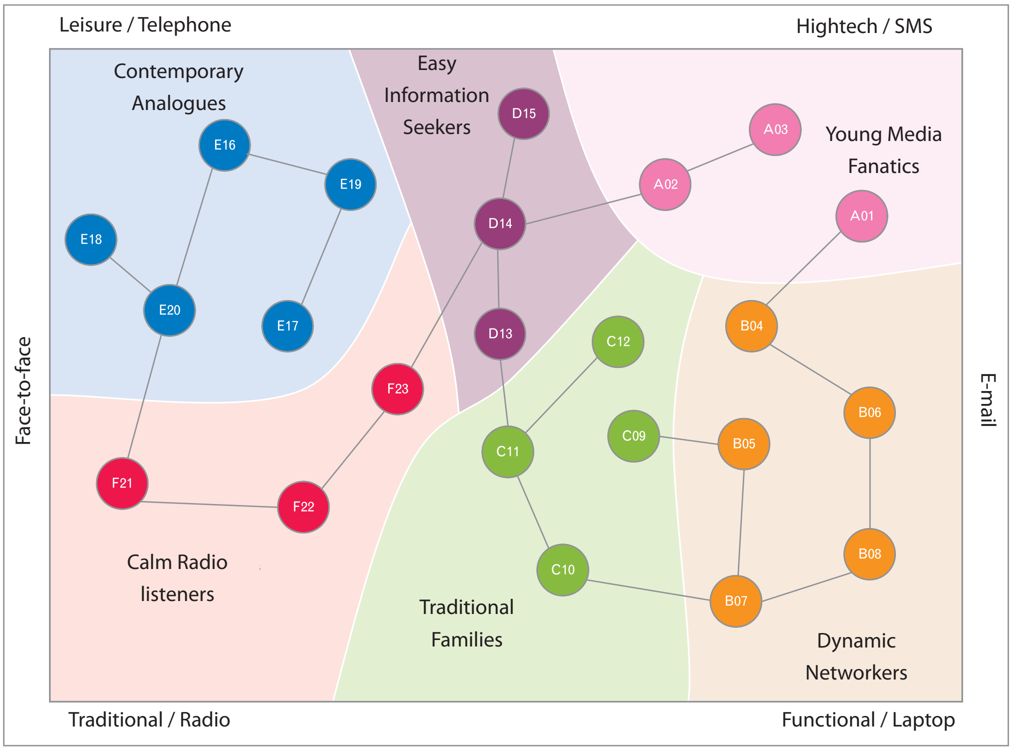
Bourgeois Prosperity contains people who have achieved a high level of material comfort. Typically middle to late middle aged, married and with older children, they live in spacious accommodation in traditional, quiet suburban locations. Most of this group will have been born into middle or upper middle income families, have enjoyed the benefit of a good standard of education and will have worked their way up to achieve positions of responsibility in large organizations. A significant minority will own and run their own businesses. People of this sort typically own their own homes and will by this stage in their life have accumulated significant equity in the homes, pensions and investments.

Comfortable Retirement (covers Dynamic Families and A14, F18)

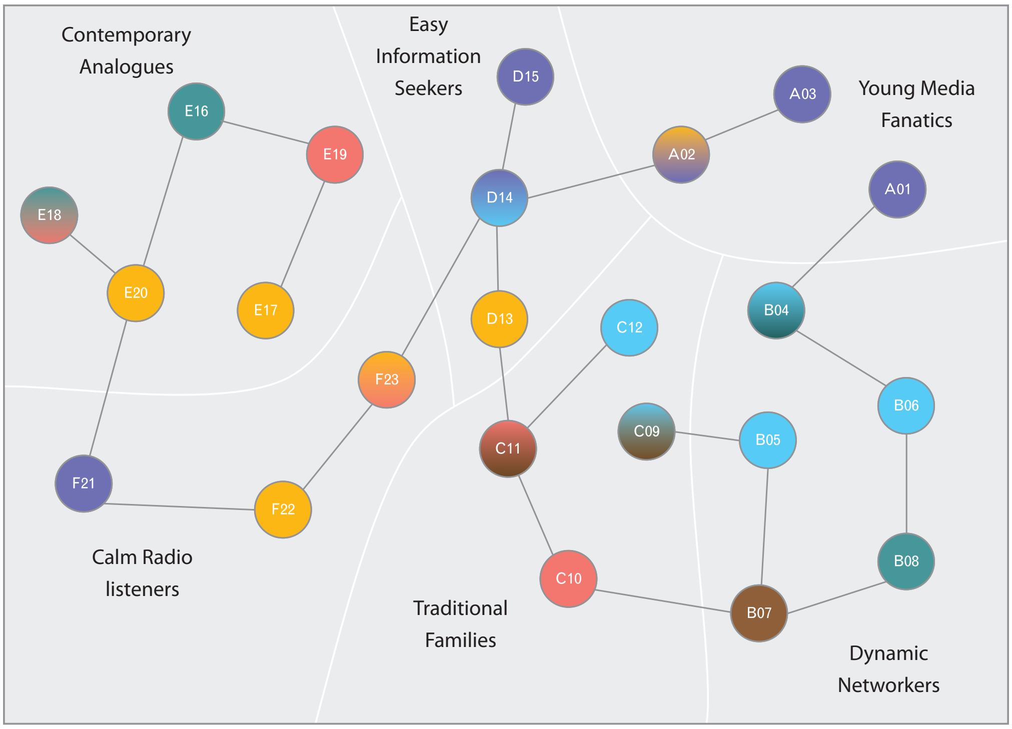
Comfortable Retirement are typically people who are retired or close to retirement, who have accumulated significant financial assets, and who now want to enjoy an active retirement in a pleasant physical environment and in the company of people of similar life stage and social attitudes. Typically living in suburban locations, in tourist regions or near the ocean, sometimes in apartments but very often in single storey accommodation, these people will often have re-located to their current home on retirement and now tend to live some distance away from their grown up children. Often enthusiastic gardeners, supporters of the arts and charities, they are confident in engaging with other members of their local community and often lead active social lives. Their homes are often full of furniture, pictures and household equipment from earlier stages of their lives and relatively more of their expenditure goes on the purchase of services than on consumer durables. Management of their financial assets is a major source of consumer interest. They often purchase by mail order but appreciate personal contact when they visit shops.

MOSAIC True Touch by Experian (2009)

Media profiles



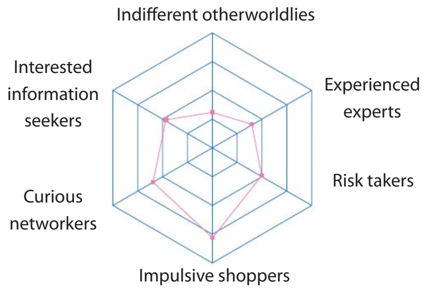
Decision styles



- Indifferent otherworldlies
- Experienced experts
- Risk takers
- Impulsive shoppers
- Curious networkers
- Interested information seekers

Most frequently occuring groups among expatriates

A - Young Media Fanatics



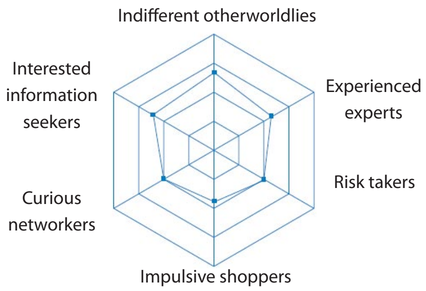
Socio-demographic and lifestyle:

- Students and starters
- Age: 18 and 24
- Social network
- Going out, cinema, sports

Media:

- New technology/media
- Multiple communication channels
- Impulsive shopping
- Information via internet

E - Contemporary Analogues



Socio-demographic and lifestyle:

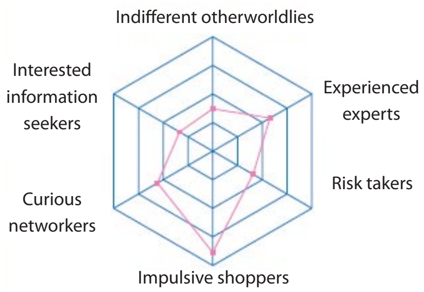
- Empty nesters
- Retired (or close to)
- Active lifestyle
- Financial freedom

Media:

- TV, newspapers, news radio, magazines
- Face-to-face contact
- Good service
- Information via traditional media and internet

Most frequently occuring types among expatriates

A01 - Multi-channel Media Fanatics



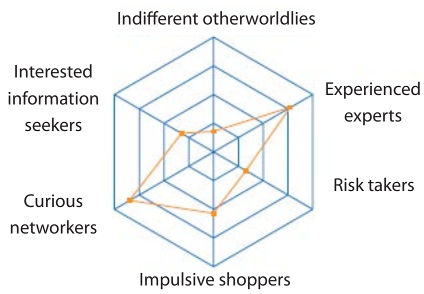
Socio-demographic and lifestyle:

- Students and starters
- Below average income
- Nightlife, sports, films, music

Media:

- Internet and mobile phone
- New media and gadgets
- Online shopping
- Impulsive shopping

B04 - Successful Networkers



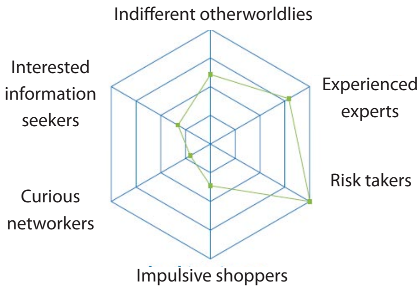
Socio-demographic: and lifestyle:

- 35-44 with young children
- Above average income
- Theatre, sauna, daytrips, holidays, skiing

Media:

- Business phone
- Digital network
- Open towards new media and technology
- Information-based shopping decisions

C09 - Ditigal Families



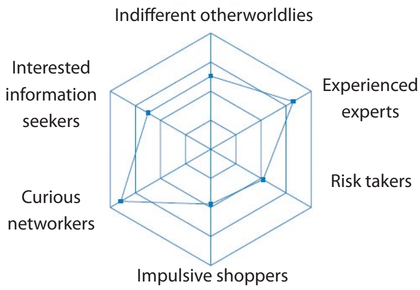
Socio-demographic and lifestyle:

- Families with children in the age 6 to 18
- Above average income
- Golf, theatre, restaurant, sailing

Media:

- Business phone
- Internet
- Familiar with new media and technology
- Impulsive shopping

E16 - Socially Active Analogues



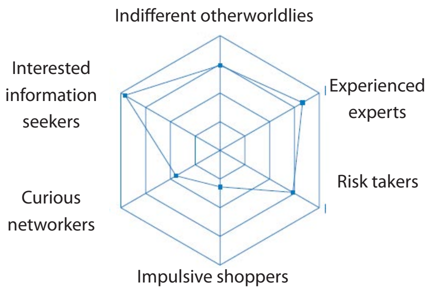
Socio-demographic and lifestyle:

- Empty nesters
- Retired (or clos to)
- Holidays, daytrips, sports

Media:

- TV
- Magazines and newspapers
- Information-based shopping decisions

E20 - Urban Analogues



Socio-demographic and lifestyle:

- Retired
- High income
- Casino, concerts, tennis, golf, holidays

Media:

- Fixed telephone line
- Rado and TV
- Door-to-door advertisement