

Abstracts

T. HERNANDEZ and M. BIASIOTTO: "Retail Location Decision-Making and Store Portfolio Management". Retailers' undertake a large number of location decisions each year, and in aggregate these decisions determine the nature and extent of the retail landscape. The paper examines retailers' location activities from the perspective of store portfolio management. A conceptual framework of retail decision-making is forwarded that identifies a range of locational options. Survey findings presented illustrate that the majority of location decisions involve managing the existing locational asset as opposed to increasing or decreasing the size of the portfolio. Retail organisations have a large amount of capital invested in their store portfolios, including, the value of land holdings and buildings, the cost of leasehold improvements and contractual leasehold liabilities. The long-term and high-risk nature of location decision-making has promoted the adoption of decision support technologies within the Canadian retail industry. GIS are used by over half of the major retailers in Canada for customer mapping, site selection, sales forecasting and other store portfolio management applications. These spatial technologies promote the objective analysis of retail data and generate intelligence to support decision-making activities. However, integrating the technology and data into business planning provide retail organisations with many challenges.

E.H. MACDONALD: "GIS in Banking: Evaluation of Canadian Bank Mergers". Recent merger proposals among major Canadian banks have required that the government, for the first time, review mergers of such size, complexity, uniqueness, and impact on society. The Canadian government's Competition Bureau has recently developed a standard process for reviewing bank mergers to help ensure that healthy competition is maintained across all markets, the results of which have a major impact on the success of the mergers. Defining geographic markets and calculating market share represent important

components of this process, bringing to the forefront an application for geographic information systems (GIS) which is not widely recognized. Today, banks use GIS for many applications, such as site selection, evaluation of closures, targeted marketing campaigns, performance measurement, market research, navigating customers to their branch locations, and enhanced reporting. But the issue of merger evaluation is one less frequently documented in a GIS context. In this paper, it will demonstrate how GIS can play a key role both in helping government establish such a process for reviewing mergers, and in helping merger candidates such as banks wishing to prepare for such a review. Methods for generating geographic boundaries, and "spatial interaction models" used for estimating market share, represent the key areas of focus.

M. BOISVERT: "L'impact du projet Quartier international de Montréal sur la ville intérieure : un premier examen" [The Impact of the *Quartier international de Montréal* Project on the 'Indoor City': A Preliminary Analysis]. The downtown of Montreal is currently experiencing a new dynamism and the *Quartier international de Montréal (QIM)* project is certainly the principal source. This project includes the extension of the Palais des Congrès, the construction of a vast underground parking complex, the redesign of public space and the addition of a new square, in addition to new office buildings. It also includes an extension of the pedestrian network generally known as 'underground Montreal', thus making a very important contribution to the design of the 'indoor city' : just in terms of pedestrian movement, the new corridors will allow the three principal segments of Montreal's network to be interlinked, which will finally guarantee its first-place world ranking in terms of size. Furthermore, from the commercial perspective, the accessibility of the commercial galleries currently in place will be substantially increased, especially during the winter season when competition from the external pedestrian network is less important. This urban redesign will furthermore contribute to the promotion of public transport over the private automobile. Finally, this

extension will allow the distance between the Palais des Congrès and the main hotels where participants in the congresses stay to be attenuated, thus tackling one of the principal handicaps of the Palais des Congrès.

M. YEATES, A. CHARLES and K. JONES: "Anchors and Externalities". A central interest of business geomatics is externalities, particularly as the theory can be applied to the spatial clustering of consumer service enterprises that may individually be competitive with each other.

Malls, as planned clusters of stores, are designed to maximize externality benefits for individual lessees. In particular, mall developers and operators provide special lease benefits for those stores (called "anchors") that generate the greatest externality benefits for others. The magnitude of the externality benefits generated by anchors has proved difficult to estimate because malls are invariably opened with stores and anchors *in situ*. The recent purchase of a restructured T. Eaton Co. Ltd. by Sears Canada, which resulted in the closure of 64 Eaton's department stores in a number of malls, provides a unique situation, however, in which the inverse -- externality dis-benefits -- may be estimated. The data on which the study is based has been derived from 18 malls, operated by a major Canadian shopping centre development company, which included an Eaton's department store as an anchor. The results demonstrate: the magnitude of dis-benefits associated with demise of Eaton's; the restricted spatial range of the negative effects; and, the variations in impact by store type. The study has important practical implications with respect to negotiations of the magnitude and length of anchor leases; decisions concerning what types of stores may be placed in the 'anchor' category; and, the mall marketing mix.

W. MICHALAK: "Retail in Poland: An Assessment of Changing Market and Foreign Investment Conditions". Retail business in Poland is

undergoing a profound transformation. After decades of a widespread neglect, rationing, and shortages, the reforms introduced in Poland in 1990 created conditions for constructing an open market economy and privatisation of state industries. The retail sector was one of the first areas of economic activity where both domestic and foreign investors took advantage of the new conditions. Most state-owned retail chains were broken up, many new store locations were added, and foreign investors introduced new standards and formats to the Polish consumers. The objective of this paper is to review some of the major trends in Polish retailing that took place since 1990 from the perspective of both foreign investment and domestic competition. First, the objectives and legacy of the centrally planned economy are examined. Then, the principles of the transition to a market economy are reviewed in the context of privatisation of the retail sector including a closer examination of the role of FDI in this process. The theoretical discussion provides a background against which changing consumer demand and responses of both foreign and domestic investors are reviewed. Finally an attempt is made to summarize the major processes involved in the transformation of the Polish retail from a centrally planned to market economy.

C.D. STORIE, C. OAKLEY and R. MUNCASTER: "The Emergence of New Format Retailing into the Commercial Structure of Cambridge, Ontario: A GIS-Based Visualisation". The geography of retail space in Canadian cities is in a constant state of flux. Over the last ten years there have been dramatic changes in the formats of retailing as the retail industry has acted on opportunities presented by the rapid levels of urban growth. Cambridge, Ontario, Canada, is a rapidly growing city of 100 000 people, with a unique and interesting retailing landscape. Cambridge is following the trend towards big-box retail development, and suburban retail growth. Currently having one major central business district, and two smaller ones (a result of amalgamation during the creation of the Region of Waterloo), the cores have experienced decline over the ten-year study period. As in other places,

consumers shifted their shopping from core to suburban shopping opportunities. More recently, newer developments have been focussed along the Hespeler Road (Highway 24) retail strip, including the currently evolving Pinebush Rd./Hespeler Rd. Power Centre, further fuelling the decline experienced in the core areas. A GIS-based visualization of the data gathered from Vernon's Street Directories for 1989 and 1999 provides details of the changing types of retailing in the study areas. Overall, retailing in Cambridge is growing rapidly, but only within key areas.