

Disrupting the giants: How independent grocers respond to the supermarket duopoly in Tasmania, Australia

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Louise Grimmer

Tasmanian School of Business and Economics, University of Tasmania, Hobart, Australia

“Together, [Coles and Woolworths] take in more than 70 cents of every dollar spent in Australian supermarkets”

(Knox, 2015)

“Small is beautiful”

(Schumacher, 1973)

2.1 Introduction

Food retailing is an essential economic, social, and cultural activity and a successful retail sector is a critical part of local communities. Small, independent grocers contribute to their local area through the provision of high-quality, locally sourced products, by supporting local farmers and producers, and by providing employment opportunities. Importantly, they also provide an alternative to the larger supermarkets. While small grocers also make a significant contribution to local, state, and national economies, in a global market, small firms are facing increasing challenges.

Australia has one of the most concentrated grocery markets in the world, with the sector dominated by two supermarket giants—Coles and Woolworths. Together, Coles and Woolworths employ more Australians than any other entity, other than state governments, and are amongst the 20 largest retailers globally (Knox, 2015). The dominance of large retailers in the Australian market makes it extremely difficult for small, independent stores to operate successfully. In Tasmania, the island state to the south of mainland Australia, two family-owned food retailing businesses—Hill Street Grocer and Salamanca Fresh—are exceptions that prove the rule (Knox, 2015).

2.2 The Australian retail landscape

From an industry perspective, retailing is Australia’s second largest employer (the largest being the health care and social assistance industry), followed by

construction and manufacturing (ABS, 2012). The Australian retail industry employs around 11% of the working population and makes a significant contribution to Australia's economic output.

Coles (owned by Wesfarmers) and Woolworths (Woolworths Limited) have interests that extend beyond supermarket retailing, including the provision of petrol, liquor, finance and insurance products, hotels and gambling, general merchandise and hardware. Together they operate nearly 1000 supermarkets, 700 petrol stations, more than 1000 bottle shops and hotels, as well as more than 500 variety and hardware stores. In the context of Australian supermarket retailing, these giant corporations now operate effectively as a powerful duopoly.

In 2010, Kantar Retail (the global retailing consultancy) released the 2010–15 Global Retail Opportunity Index Ranking, and Australia ranked number 7 out of the top 34 countries (Badillo, 2010). The index is based on three factors: the size of the retail market, market risk, and inflation-adjusted growth forecasts. Of note, Australia's sustained growth resulted in a higher ranking (at the time) than the United Kingdom, France, Japan, and Germany. Retailing is more global than ever and large retailers continue to trade across borders. While the opportunities vary by region (and within regions), the large global retailers continue to compete with one another in the search for international growth (Evans, 2011). In this rather "fertile" retail landscape, Coles and Woolworths have grown to become Australia's top two retailers and both corporations are in the top 20 (in terms of revenue) in the list of global retail firms.

There are around 140,000 retail businesses in Australia (Productivity Commission, 2014) and the food retailing sector is diverse with considerable differences between retailers in terms of business size, format, and offerings; these differences are further highlighted across different regions throughout the country.

2.3 Retailing in Tasmania

In the southern Australian island state of Tasmania, with a population of just over half a million (ABS, 2013), two family-owned food retailing businesses have challenged the Coles/Woolworths duopoly. The state's population is concentrated into three regions: Hobart in the south, Launceston in the north, and Burnie and Devonport in the northwest. Compared with the majority of the Australian mainland states, Tasmania has a small population (with little population growth), high rates of unemployment, low socioeconomic status indicators, an ageing population, and low rates of private and government investment (DIRD, 2012). The environment for small food retailers is challenging: there is a shortage of retail property available for rent/purchase, and retail rents are relatively high (Productivity Commission, 2014). In addition, there is a distinct lack of shopping "clusters" in local neighborhoods and a growing trend toward "big box" or high-rent and anchored shopping centers (housing a Coles or Woolworths supermarket).

Although in mainland Australia, German-owned Aldi and the US wholesaler Costco are making significant gains in market share (and it is rumored German-owned Lidl is also poised to enter the Australian market), neither Aldi nor Costco currently operate in Tasmania. Therefore, in the context of Tasmanian supermarket retailing, Coles and Woolworths are the “big two” throughout the state, with Woolworths operating 31 supermarkets, and Coles 16. It should also be noted that the IGA (Independent Grocers Australia) group also operates 88 small to medium stores in Tasmania. However, although the IGA stores outnumber Coles and Woolworths, these two corporations still represent almost 90% of market share in Tasmania and the state has been characterized as home to a “hyper-concentration of Coles and Woolworths” (Glaetzer, 2015).

Over the past decade, two family-owned and run independent grocers—Hill Street Grocer and Salamanca Fresh—have increased their market share in Tasmania (and accordingly their buying power) through the provision of high-quality products, an enjoyable customer experience, expansion of stores (mostly in southern Tasmania), and a range of creative offerings that have set them apart from their smaller competitors as well as from Coles and Woolworths. From original single stores, they have systematically taken over existing grocers (many of them IGA stores) or started from scratch in empty premises. Both firms have a strong brand identity and are known for stocking local products, the provision of attractive stores, and for superior customer service.

Salamanca Fresh was originally conceived as a single store in 1982 situated on Hobart’s historic Salamanca Place, and then known as the Salamanca Fresh Fruit Market. The Salamanca area is now a thriving hub for tourists, business visitors, and locals who live and work in the area. Since its inception, this waterfront area has seen increases in the number of people living in Salamanca and nearby Battery Point, and the University of Tasmania has opened a large and modern building nearby to house its Institute for Marine and Antarctic Science. The Commonwealth Scientific and Industrial Research Organization has offices nearby, and many of the old wharf sheds and associated buildings have been renovated and put to use housing special events, festivals, and conferences. The area has dramatically changed since Salamanca Fresh opened as a result of the influx of visitors, local residents, and city workers. The location of this Salamanca Fresh flagship store is therefore ideal to serve the local market. Nestled alongside art galleries, restaurants, bars, and specialty shops, the Salamanca Fresh store is a landmark grocer and a popular shopping destination for local travelers, Airbnb guests, and those on their way home from work. The business is owned and operated by the Behrakis family and there are now seven stores operating in the south of the state employing over 100 staff.

In 2001, the three Nikitaras brothers and their families renovated and rebranded an original family-owned corner store in the suburb of West Hobart in southern Tasmania to create the original Hill Street store (now known as Hill Street Grocer). In addition to the bricks and mortar stores, Hill Street Grocer also offers an extensive online shopping option. Hill Street Grocer operates nine stores throughout Tasmania (six in southern Tasmania, two in the north, and one in the northwest), and there are plans for at least two new stores to open in the south in the next year.

Hill Street Grocer and Salamanca Fresh stores are strategically located either in high socioeconomic status neighborhoods or in lower socioeconomic status suburbs with no other local grocery offering. The expansion imperative means both firms are able to better negotiate with local suppliers and create and sustain growth through economies of scale. Both firms recognize the growing demand from consumers who want to shop locally, want to know where (and how) their food is sourced or produced, and are increasingly shunning the impersonal corporatization of the large supermarket chains.

2.4 Differentiation strategy

One of the most frequently applied approaches to retailing from the field of strategic management has been the work of Porter (1980, 1985) on competitive advantage (e.g., Alexander & Veliyath, 1993; Ellis & Calantone, 1994; Ellis & Kelley, 1992; Morschett, Swoboda, & Schramm-Klein, 2006). The term “competitive advantage,” first used in the 1970s (South, 1980), is the process through which a firm can identify, develop, and then take advantage of a sustainable business edge over its competitors and refers to the ability of a firm to create value for its customers that exceeds the cost of creating that value (Ellis & Kelley, 1992; Ellis & Calantone, 1994). Although a firm may have a number of specific strengths and weaknesses compared with its competitors, Porter (1980) proposed two basic types of competitive strategy: cost leadership and differentiation. Traditionally, the corner store, or the local grocer, could compete on convenience, customer service, and product offering (differentiation) but usually not on price (cost leadership). Independent grocers usually have to make a choice between the two strategies and select only one, as most firms cannot be “all things to all people.”

In Australia, Coles and Woolworths clearly pursue a cost leadership strategy. That is, they are concerned with ensuring cost reductions across all departments (e.g., labor, distribution, control systems) (Ellis & Kelley, 1992; Porter, 1980), as well as ensuring that they still maintain a level of service and quality. Achieving and maintaining a cost leadership strategy usually depends on the firm possessing advantages in the industry such as market share, access to financial capital, purchase of specific equipment, supply chains, and logistics. As a result of their cost leadership strategy, Coles and Woolworths are able to command high margins and reinvest in equipment and processes which allow them to maintain and sustain their low cost proposition.

On the other hand, differentiation sets apart a firm’s product or service from its competitors and allows them to offer something unique within their industry, for example, offering high quality products as well as a reputation for excellent customer service (Day & Wensley, 1988; Wortzel, 1987), as in the case of Hill Street Grocer and Salamanca Fresh. The differentiation strategy targeted by Hill Street Grocer and Salamanca Fresh does not mean that they ignore cost; rather, cost is not the primary concern. Through effective differentiation, both firms are able to focus on a narrow segment of the market, and as a result they enjoy brand loyalty from customers, higher margins, and increased market share.

2.5 Taking on the giants

How do Hill Street Grocer and Salamanca Fresh enact their differentiation strategy? This can be examined by considering how they both approach the 4Ps of marketing.

2.5.1 Product

Walking into a Hill Street Grocer or Salamanca Fresh store, it is apparent that the offering is of particularly high quality, with attention to detail and an efficient yet friendly atmosphere. Products are attractively presented with a clear focus on Tasmanian produce (across a wide range of product lines) and this is one of the major drawcards for local shoppers. The Hill Street Grocer experience could be described as more “up-market” than that offered by Salamanca Fresh. In addition to the in-store experience, Hill Street Grocer are also more sophisticated in terms of their online presence, their product offerings, and their marketing, and in 2016 Hill Street Grocer won the title of National IGA Retailer of the Year.

Both stores offer a one-stop shopping experience with a limited range of general merchandise. They offer a plentiful array of fresh and locally grown fruit and vegetables, as well as an extensive range of gourmet delicatessen products, cheese, wine, and international food products. Many smaller producers are being dropped from the larger supermarket shelves as the major players move to stock only global or national brands or increasingly their own private label products. The small grocery industry, therefore, plays an important role in supporting and promoting smaller producers and innovative products and providing an outlet for consumers to discover new and different products.

In addition to food and grocery products, Hill Street Grocer recently launched a signature “Hill Street Grocer Home” range which is housed in the new flagship store (around the corner from the original Hill Street Grocer corner store) as well as the Devonport store. The range offers homewares, kitchenware, a hamper collection, a cheese room, local handmade chocolates, and an in-store florist. Customers can also purchase Hill Street Grocer Home items online and have flowers, hampers, and gifts delivered directly to friends and family. Hill Street Grocer also offers customers a wine and cheese loyalty club, and a range of catering options and ordering systems, including office fruit box delivery, Christmas and Easter delivery, click and collect, gift hampers, gift cards, and even a fuel discount voucher program in conjunction with their own single petrol station and nine other fuel outlets around the state. During the Christmas shopping season, both grocers are also known locally for stocking much higher quality local, seasonal holiday food products than Coles and Woolworths, and Hill Street Grocer also offers a preorder service for gourmet Christmas products.

Wahl (1992) describes the most important elements that shoppers look for in a grocery/food store, and 25 years later those criteria are still relevant for the contemporary consumer. Wahl’s elements were cleanliness, all products prices labeled,

good produce department, pleasant and knowledgeable staff, low prices, use-by dates on products, a good meat department, well-stocked shelves, unit pricing on shelves, and convenient store locations. As is detailed below, Hill Street Grocer and Salamanca Fresh exceed all of Wahl's critical elements.

2.5.2 Price

The target market for both Hill Street Grocer and Salamanca Fresh are middle-aged, well-educated, higher earning professionals and families who are interested in healthy eating, ethical consumption, and who are looking for a pleasant shopping experience.

On many products, particularly fruits and vegetables, Hill Street Grocer and Salamanca Fresh are often cheaper than Coles and Woolworths, and both firms offer competitive weekly specials on a range of products, including food products and general merchandise. Notably, the home delivery charge for Hill Street Grocer is the same as that charged by Coles and Woolworths. However, in general, the prices are higher than those offered by the larger chains. In addition, a number of the exclusively stocked gourmet food products are higher in price and the Tasmanian wine products are usually more expensive than local liquor retailers. In Tasmania (and Australia), alcoholic products are not allowed to be sold in supermarkets but must be purchased from stand-alone liquor stores. However, independent grocery stores can sell wine (and beer or cider) but only if it is Tasmanian.

2.5.3 Place

Hill Street Grocer and Salamanca Fresh stores are visually appealing and pleasant places to shop. Giant tubs and rows of attractively presented fruit and vegetables greet customers as they enter a Hill Street Grocer or Salamanca Fresh store. Customer service is professional, friendly, and prompt. Each store has a large number of checkouts and staff are regularly called to open additional stations when it is busy in store. Personalized service is emphasized—there are no self-service checkouts—and management and staff know many of the customers by name. Both Hill Street Grocer and Salamanca Fresh have focused on retaining existing staff (whenever possible) from businesses that have been taken over by their brands, and in many of the suburban or outer suburban areas they hire staff who live locally.

The Hill Street Grocer in West Hobart is so popular that the store employs staff solely to direct traffic in the store's rather modest car park, and the store in Devonport also houses a popular and bustling Hill Street Café.

While Hill Street Grocer has an expansion strategy across the state, Salamanca Fresh have limited their growth just in southern Tasmania, where they continue to rebadge existing stores in various Hobart suburbs. Salamanca Fresh sites are strategically located in suburbs populated by their target market and all seven stores including their original flagship store in Hobart's historic Salamanca Place are performing strongly.

We are experiencing exceptional consumer demand and growth in our business and we recognize the need to make sure we have a strong presence in growing areas in the South (Beniuk, 2015).

2.5.4 Promotion

Hill Street Grocer promotes itself as “your local store” and employs a sophisticated marketing strategy. The firm operates a comprehensive website (www.hillstreetgrocer.com) which includes online shopping (click and collect as well as home delivery in many locations). Customers can also shop online from the Hill Street Grocer Home range.

There is a blog, an online recipe collection and an email newsletter, which provides all the latest specials, exclusive promotions, and news. Weekly specials are emailed to their member customer list. There is a quarterly newsletter, *Provisions*, which is available online and in store. As well as providing seasonal recipes and cooking tips, the newsletter profiles local producers and growers includes book reviews, interviews with local restaurateurs, celebrity chefs, sommeliers, gardeners, and authors. At Christmas, Hill Street Grocer is the “go to” store for gourmet holiday supplies with customers able to preorder basic and deluxe Christmas food and trimmings—locally made plum puddings and mince pies, Tasmanian seafood, game, ham, and turkey. Goods are packed and ready for customer pick up as late as Christmas Eve.

Salamanca Fresh’s tagline is “famous for freshness since 1982” and their main focus has always been on the fruit and vegetable offering; with their branding and marketing reflecting this. As stated earlier, the original name was the “Salamanca Fresh Fruit Market.” The grocer underwent an extensive rebrand in 2002 to become Salamanca Fresh with expanded stores, staff uniforms, environment-friendly shopping bags, and more modern signage and marketing collateral. The website is fairly basic (www.salamancafresh.com.au), but it is updated with weekly specials and recipe ideas. Salamanca Fresh’s strategy is to drive customers into the stores and it does not offer online shopping. Salamanca Fresh’s emphasis has always been on guaranteeing fresh products for their customers through well-established supply chains and relationships with growers and producers.

2.6 Foes or allies?

Both Hill Street Grocer and Salamanca Fresh have purposefully and strategically adopted a differentiation strategy. Specifically, they distinguish their offerings from the two major players through stocking high-quality (local and seasonal) fresh produce, local artisanal, and international gourmet food products as well as dedicated meat, delicatessen, and cheese counters and a range of preprepared, “ready to heat” gourmet meals.

With both Hill Street Grocer and Salamanca Fresh pursuing a rapid expansion model, they have faced criticism from some in the industry that they are limiting the success of other small grocers as well as impacting retail diversity in the Tasmanian market. However, growth may be the only option for the survival of the independent grocery sector, as operating more stores equals greater buying power and market share.

Although on the face of it Hill Street Grocer and Salamanca Fresh are competitors, in many ways they are actually allies. Although they are not pursuing a traditional “horizontal marketing” strategy (e.g., Lewis, Byrom, & Grimmer, 2015; Morris, Kocak, & Ozer, 2007), both firms acknowledge that if the independent sector flourishes, it is beneficial for all the smaller players in the industry. A strong independent grocery sector is an effective way to compete against Coles and Woolworths.

It's good if they [Salamanca Fresh] do well and it's good if we [Hill Street Grocer] do well. It's important the smaller independents do better. We have to give people a reason to shop locally and independently (Glaetzer, 2015).

2.7 Shopping trends and the impact on consumers

There have been a number of social, cultural, and economic trends that have impacted on the success of Tasmania's two leading independent grocers. Consumers are increasingly continuing to embrace local shopping and support small businesses and they are increasingly aware of ethical and sustainable issues with regard to the sourcing, purchasing, and consumption of food products.

2.7.1 Shop local movement

Both Hill Street Grocer and Salamanca Fresh have enjoyed the resurgence in the “shop local” movement, which in tandem with the popularity of the “eat local” trend has put the focus on fresh, sustainable, and local produce (e.g., Aucoin & Fry, 2015). Consumers are increasingly concerned with the provenance of food, the sustainability of the processes by which the food has been produced and has traveled, and the importance of the ethical nature of the relationship between retailer, supplier, and producer (Nonini, 2013).

Customers have certainly become far more discerning in how and where they shop. Shopping locally is the preference of the majority of our customers (Beniuk, 2015).

Indeed, the target market for Hill Street Grocer and Salamanca Fresh are educated, time-poor, higher earning professionals who are concerned with the provenance of their food. Independent grocers are more readily able to provide these

consumers with such information, as they usually stock a variety of products from smaller, local producers. This delivers their customers high levels of local provenance for the various product lines stocked; something which larger supermarkets Coles and Woolworths find it harder to do.

2.7.2 Ethical consumption

Another trend, related to the shop local and shop small movements, is the increasing concern amongst particular groups of consumers about the provenance of the food and general grocery items they purchase. More and more consumers want to know that the products they buy have made their way to the retailer through an ethical and sustainable supply chain. They are interested in organic food, local food systems, and sustainable agricultural practices, including the ethical treatment of animals (Beagan, Ristovski-Slijepcevic, & Chapman, 2010). “Ethical” consumption or “green” consumption promotes the notion that in making everyday food choices, consumers can “think critically, buy more selectively, and seek out information on the environmental and social costs involved in their daily meals” (Johnston, 2008: 239).

With the focus on providing fresh Tasmanian local produce, as well as other local products including bread, cheese, chocolates, and more, both stores maintain strong relationships with farmers, producers, and local suppliers. This has benefits for the state’s farmers and producers of artisan products.

If they’re [Hill Street Grocer and Salamanca Fresh] concentrating on Tasmanian produce then of course that’s better for the agricultural producers (Beniuk, 2015).

2.7.3 Time-poor lifestyle and the luxury of choice

Echoing the global trend across developed nations, Tasmanians are becoming increasingly time-poor, and shoppers with higher disposable incomes are seeking ways to minimize the time they spend on shopping and other nonleisure activities such as housework and home maintenance. These consumers have the “luxury of choice” in choosing shopping options that may involve paying slightly higher prices as a trade-off for convenience. In this regard, both Hill Street Grocer and Salamanca Fresh offer their customers a value for money proposition. The beauty of a local grocer is that the stores are smaller, often more conveniently located with easy parking facilities, and offer an increasing range of high-quality products including ready-to-eat gourmet meals. The interior of the store is welcoming, the staff are friendly and the entire shopping trip takes less time on average than a trip to the larger supermarket chain. For Hill Street customers, shopping can be ordered online and then delivered to the door or picked up from the store on the way home.

2.7.4 Tourism and the “MONA effect” in Tasmania

Another factor which has affected the level of sophistication of product offerings and the expansion of stores into particular regions or suburbs in Tasmania is the incredible growth in tourism experienced by Tasmania over the past 5 years. Once considered by many on the “mainland” as a “cultural backwater,” Tasmania has recently “come of age.” Thanks to the stellar popularity of multimillionaire David Walsh’s Museum of Old and New Art (MONA) in Hobart, as well as its associated mid-winter and summer festivals (“Dark Mofo” and “Mona Foma”), the numbers of culturally sophisticated and discerning travelers to Tasmania has been increasing at such a rate that in 2015 the global travel authority Lonely Planet voted Tasmania as one of the world’s top visitor regions ([Tourism Tasmania, 2015](#)). This new cohort of tourists are interested in food and wine experiences and they are keen to sample the high-quality fresh fruit and vegetables, artisan cheese, breads and small goods, and world-class wine that Tasmania is producing.

The state’s now solidly cemented reputation as a “must-visit” destination for “foodies,” coupled with the rise of the sharing accommodation (including many Airbnb travelers who want to “live like the locals”), means that shops selling high-end, good quality, and locally produced products are in strong demand. Airbnb visitors, in particular, are seeking a more authentic experience; many consider themselves to be travelers as opposed to tourists, and this self-perception underscores their passion for more genuine, and therefore, local travel experiences. They want to discover more and make a deeper connection with their destination; they want to shop, eat, and drink where the locals do.

In addition to the provision of quality products, both Hill Street Grocer and Salamanca Fresh offer pleasant retail premises. They have carefully designed their stores to enhance the shopping experience and appeal to consumers through the provision of attractive displays and merchandising highlighting local and artisanal products. Increasingly, more locals and visitors to Tasmania are shopping at independent grocery stores, which are becoming the hub of local neighborhoods, as well as playing a vital role in supporting local growers and suppliers.

2.8 The future for the Tasmanian grocery sector

Clearly, physical retail continues to play a very important role for both consumers and retailers. Independent “local” grocers such as Hill Street Grocer and Salamanca Fresh are successfully meeting consumer demand for locally produced and sourced products presented in a pleasant shopping environment. People still want to see and touch products before they purchase them, they want to enjoy the social role that “bricks and mortar” shopping provides, and they want to be part of an exchange that benefits others—farmers, artisans, niche food producers—and provides employment for local people.

Given that the Australian supermarket and grocery sector is one of the most competitive in the world, the future of the industry can perhaps be described as

“polarizing.” The sector may well be moving toward a choice between either very large and impersonal supermarkets selling national brands and private supermarket label products, and smaller, independent stores supporting local producers and suppliers. Indeed, as the Tasmanian industry shows, the growing popularity of small, independent, and local shops highlights the clear distinction between, on one hand, the differentiated offering provided by grocery stores such as Hill Street Grocer and Salamanca Fresh and, on the other hand, the more cost-driven proposition from the large national supermarkets such as Coles and Woolworths.

What then are the implications for those grocery stores and supermarkets that fall somewhere in-between? As Porter (1980) notes, a firm that is not able to develop a differentiation or cost-leadership strategy is unlikely to enjoy sustainable competitive advantage. These firms will effectively be “stuck” in the middle and suffer from low profitability. These retailers will either be small grocery stores and individual supermarkets which are too small to achieve competitive economies of scale required for cost leadership or they will be too large (but not large enough to compete with the “duopoly”) to build reliable supply networks with local producers and suppliers and therefore unable to offer product differentiation. As the retail industry, in Australia, and internationally, continues the trend toward consolidation, these are the types of firms that will be unable to compete and will fall by the wayside.

It is in this competitive milieu that Hill Street Grocer and Salamanca Fresh have grown their businesses from original single-site stores to their current chains. They successfully exploit a niche market that is not served by the very large supermarkets in Tasmania. Both family-run stores recognize what their customers want, and it is different from that offered by the large supermarket chains. Hill Street Grocer and Salamanca Fresh are succeeding in the game of differentiation and are excelling at “disrupting the giants.”

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