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A PRELIMINARY ASSESSMENT OF THE RESILIENCE OF PORTUGAL'S COMMERCIAL FABRIC TO THE COVID-19 PANDEMIC

UMA AVALIAÇÃO PRELIMINAR DA RESILIÊNCIA DO TECIDO COMERCIAL DE PORTUGAL À PANDEMIA DO COVID-19

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Abstract

The current Covid-19 pandemic has had profound impacts worldwide. Social confinement and isolation suddenly appeared in stark contrast to a clearly more globalized and mobile world. In economic terms, this situation has led to the closure of several companies and high numbers of unemployment. In this article we focus on the commercial sector that, in the current context, faces unparalleled challenges. The objective of this research is to provide a preliminary assessment of the answer given by the commercial fabric in Portugal to face the mandatory closure of part of the commercial companies and the duty of social confinement. An analysis carried out during the period in which the measures were at their peak allow us to conclude that a strong targeting for e-commerce has been a strategy of retail resilience used to minimize the reduction in sales volume. The temporal sustainability of the measures initiated has yet to be determined, since, although crucial for the resilience of commercial establishments in this period of pandemic, it is preliminary to draw conclusions about their sustainability over time.

Keywords: Covid-19; Retailing; Resilience; e-commerce; Retail resilience

Resumo

A actual pandemia do Covid-19 tem produzido impactos profundos por todo o mundo. O confinamento e isolamento social surge em claro contraste com um mundo mais globalizado e móvel. Em termos económicos, esta situação levou ao fecho de várias empresas e a um número elevado de desempregados. Neste artigo vamos focarmo-nos no sector comercial que, no actual contexto, se debruça com desafios sem paralelo. O objectivo desta pesquisa é o de elaborar uma análise preliminar sobre a resposta dada pelo tecido comercial em Portugal para fazer face ao encerramento obrigatório de parte das empresas do comércio e ao dever de confinamento social. Uma análise elaborada durante o período em que as medidas estavam no seu expoente máximo permitiu-nos concluir que o direccionamento para o *e-commerce* tem sido uma estratégia de resiliência comercial utilizada para minimizar a redução do volume de vendas. A sustentabilidade temporal das medidas encetadas ainda está por apurar, na medida em que, embora cruciais para a resiliência dos

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estabelecimentos comerciais neste período de pandemia, é preliminar a obtenção de conclusões acerca do seu prolongamento no tempo.

Palavras-chave: Covid-19; Comércio; Resiliência; e-commerce; Resiliência comercial

Introduction

"The economic and social effects will be deeper and more lasting than the longest crises we have ever experienced because it brutally worsens the poverty of the poorest, the inequalities of the most unequal and the exclusions of the most excluded."

It was with these words that the president of Portugal, Marcelo Rebelo de Sousa, addressed the country when renewing the state of emergency on April 2, 2020. COVID-19 pandemic is producing unparalleled effects, that extends to all vectors of the society. The depth of the limitations on peoples' mobility is unseen, exacerbated because it happens in a period where mobility is taken for granted for a significant part of the world population. Suddenly, the continuous growth of global tourism in the last decades collided with restrictions on the population being able to even leave their home space. Moreover, the social dimension of the effects of this pandemic has also highlighted and deepened social inequalities. On the one hand, the obligation to stay at home is a privilege for some, as, others, must continue their work on behalf of the public interest. Several of the unskilled and underpaid workers have proven to be essential in this period. Supermarket cashier operators, garbage collectors, postmen, are among the few workers who continue to work almost normally. On the other hand, access to health care is not universally equal. Some countries have weak healthcare resources at the disposal of the population to deal with this pandemic. In others, although there are resources, they may not be widely accessible to all citizens.

In economic terms, the confinement of the population led to the interruption of the activity of several companies in the industry, retail and services, causing the bankruptcy of several companies and high levels of unemployment. Covid-19 has set an unprecedented challenge for retail. Nonetheless, some retail companies have been re-inventing their business model to counterpart the overall lack of economic viability. The aim of this article is to analyse the measures implemented by retail companies in Portugal to address the abrupt and sharp drop in turnover, because of the restrictions and limitations that arise from the Covid-19 pandemic.

The Covid-19 pandemic and the global challenges it brought, prompted a rapid response from the scientific community. A search on the *Web of Science* search engine on April 27 2020, at a time when the pandemic was still far from being controlled, showed that 1,098 scientific documents were already available from the community. Given the nature of the problem, naturally, the vast majority were related to the medical sciences, as it is the scientific field in which results are most urgently needed. This article aims to make a preliminary and timely contribution to the analysis of other sectors of society that are also profoundly affected by the pandemic, namely retail, thus contributing to a broader understanding of how Covid-19 has affected society.

Retail change and resilience

Traditionally, most studies on retail change focus on two vectors, often interconnected. The first relates with the economic and entrepreneurial dimension of the sector (DAVIES, 2004; HOWE, 2003). As a private activity, retail has been subject to numerous changes over the course of time (GUIMARÃES, 2016). Since the middle of the last century, we have highlighted the decrease in the number of independent, family-run companies, to the detriment of large economic groups. Associated with this process, a small group of companies have, in several national contexts, a significant market share in certain retail typologies. For instance, in Sweden in 2000, 95% of all grocery shopping was made in stores that belong to the five largest companies in that country, similar to the same process in Denmark (BELL; CUTHBERTSON, 2004). The need to maximize profit comes through expansion, such as Inditex group that operates internationally and through the introduction of innovative processes (MIRANDA, 2020). It is within these processes that new retail formats are created and new sales techniques and methods are introduced, in a Schumpeterian creatively destructive practice (OZUDURU; GULDMANN, 2013). Retail change must be read within an evolutionary path, performed at different velocities. Something as ordinary in current days as free-service in retail is to be seen as a part of this evolution, relevant if one considers how it is strongly connected with new formats that were progressively introduced in the retail systems, such as the different food retail typologies that currently form the retail landscape of several countries. A more cultural perspective of this dimension has been focusing on retailing as a particular form of consumption (PACIONE, 2005), complementary to the perspective of retail as a "means to satisfy basic needs" (PACIONE, 2005, p. 327), in what Cachinho (2014) designed as consumerscapes.

The second vector relates to how this evolution of retail impacts cities, their urban dynamics and their population. The relation between retail and cities is strong and interdependent; thus, the evolution of one will produce effects on the other, and vice-versa (GUIMARÃES, 2017). Although the contemporary evolution of retail, in what concerns the decline of town centres is situated by broader studies on urban geography as a part of restructuring of the city towards a post-industrial economy based on services (SWYNGEDOUW; MOULAERT; RODRIGUEZ, 2002), research more focused on the geographies of retailing have been devoted to study the effects of peripheral shopping centres in the retail fabric of town centres (GUY, 2007). This decline of town centres triggered a robust publication record focused on the analysis of the vitality and viability of these areas (SCHILLER, 1994). Moreover, studies on public policies towards retail fit within this vector. Retail planning policies gained prominence in the scientific community (DAVIES, 2004), in parallel with its increasing relevance within urban planning. In the last decades of the 20th century, several regulations were implemented, aimed to protect the sustainability of urban retail systems (CACHINHO; BARATA-SALGUEIRO, 2016). Underlying the intervention of the public sector in a private activity was the consideration that retail performs an activity of public interest, in the sense that supplies a basic need of the population (GUIMARÃES, 2016).

Recently, in the last decade, the concept of resilience has been applied to retail studies (WRIGLEY; DOLEGA, 2011). Resilience is usually analysed under one of three approaches: engineering; ecological and adaptive (BARATA-SALGUEIRO; FEYZAN, 2014). In the engineering approach, resilience is understood as the response given to a certain impact, aiming the return to a pre-impact state, in which the equilibrium of the respective system will be achieved (GUIMARÃES, 2018a). The ecological approach concerns with how much stress can a certain system support, i.e., what is carrying capacity, after which the system is no longer able to fulfil the functions. Lastly, the adaptive approach is related with the "bounce forward" as described by Wrigley and Brookes (2014). It considers an evolutionary stance (OZUDURU; GULDMANN, 2014), in which, when resilience is achieved, the system will be a step forward of where it was before suffering the impact that forced the sector to change. It is this latter approach that better characterises retail. Subject of intense impacts, the response given by retail usually follows an evolutionary perspective. Has a practice, resilience has long been present in retail. The continuous transformation of the sector (GUIMARÃES, 2019) is a resilience stance in the sector evolutionary road. In the scientific community, its use lays on its conceptual utility to understand the evolution of the retail sector and the equilibrium or disequilibrium of the urban commercial systems where it is inserted (CACHINHO, 2014). Thus, it is not only the change in the commercial sector that is analysed but also how it is processed and how it relates with the urban fabric (WRIGLEY; BROOKES, 2014). Retail resilience can be defined as "the ability of different types of retailing at different scales, to adapt to changes, crises or shock that challenge the system's equilibrium, without failing to perform its functions in a sustainable way" (BARATA-SALGUEIRO, 2011, p. 30).

Methodology

This article was designed during the Covid-19 pandemic in the early months of 2020. Research and writing took place during the isolation period. Thus, the adopted methodology was adapted to the circumstances, namely to the impossibility of carrying out fieldwork. The realization of interviews, even if it was possible through the currently existing online instruments, proved to be not possible; largely because retail agents are currently fully engaged in the process of adapting their businesses, a subject we discuss in this article. Thus, in addition to the literature review that sustain the theoretical framework, an analysis of information collected in trustworthy online newspapers proved to be crucial for the case study. Jowett (2020), enhanced the validity of this resource as a compelling data sampling technique within qualitative research to overcome the limitations inherent to moments like the one we are currently experiencing. In addition, these sources also proved to be useful due to their timeliness.

Retail change, adaption and resilience in Lisbon during Covid-19 pandemic

Following the trend adopted in most western European countries, overall, current retail policies in Portugal are not restrictive (GUIMARÃES, 2016). Regarding stores not included in commercial facilities such as shopping centres, and apart from complying with certain formal procedures, differentiated according to the commercial typology, the legislation is permissive regarding the opening of stores and their opening hours.

In 19 March 2020, the Portuguese president, Marcelo Rebelo de Sousa, established the state of emergency in order to better control the spread of the Covid-19 across the country. In addition to the duty of confinement by the population, some retail and services activities had to stop operating. By restricting the people's mobility, retail lose much of the vitality it needs to remain viable. In another perspective, if retail were to be allowed to operate normally, the mere movement of people that supports the sector such as retail suppliers and workers, would undermine the desired effect of limiting the number of people circulating. Not all retail was forbidden to operate; retail typologies considered as relevant for the supply of the population basic needs could remain open. Regulation was put into place, setting a list of 35 retail and services activities that could keep operating (table 1).

Table 1: List of retail and services activities allowed to keep operating

1. Mini-markets, supermarkets, hypermarkets;
2. Fruit shops, butchers, fishmongers, bakeries;
3. Markets, in the case of sale of food products;
4. Agri-food production and distribution;
5. Wholefood suppliers
6. HORECA, under specific regulation
7. Preparation of meals ready to take home, under the terms of this decree;
8. Medical services or other health and social support services;
9. Pharmacies and places of sale of non-prescription drugs;
10. Establishments of medical and orthopaedic products;
11. Opticians;
12. Establishments of cosmetic and hygiene products;
13. Establishments of natural and dietary products;
14. Essential public services and respective repair and maintenance
15. Stationery and tobacconists (newspapers, tobacco);
16. Social games;
17. Veterinary clinics;
18. Establishments selling pet animals and their food;
19. Establishments selling flowers, plants, seeds and fertilizers;
20. Textile and fur washing and dry-cleaning establishments;
21. Drugstores;
22. Hardware stores and outlets selling DIY supplies;
23. Fuel filling stations;
24. Establishments of sale of fuels for domestic use;
25. Car and motorcycle maintenance and repair establishments
26. Sales and repair shops for household appliances, computer equipment and communications
27. Banking, financial and insurance services;
28. Funeral and related activities;
29. Home maintenance and repair services;
30. Security or home surveillance services;
31. Cleaning, disinfection, rat removal and similar activities;
32. Home delivery services;
33. Tourist establishments, except campsites, where those can provide restaurant and drink services on the premises exclusively for their guests
34. Services that guarantee student accommodation.
35. Activities and establishments listed in the previous numbers, even if integrated in shopping centres

Source: After resolution of the council of ministers D204/XXII/2020

Regarding establishments from the typology "HORECA", included in this list, an exception was made. Thus, restaurants and similar establishments could maintain their activity but for the exclusive purpose of cooking for take-away or home delivery. On the basis for the preparation of the list (table 1), were the activities considered as suppliers of goods and services that satisfy basic needs. Although this list is significantly extensive, one must take in consideration the contemporary evolution of the retail fabric of most cities, characterised by the large dissemination of stores associated with leisure and consumption. Moreover, the homogenisation of the commercial fabric as a consequence of the growing importance of tourism that affects many countries, including Portugal (LITVIN; ROSENE, 2017), has led to a decrease in the stores that serve the local populations, to the detriment of establishments that serve the new floating population made up of tourists (GUIMARÃES, 2018b). This means that most of the town centres and High Streets are, in these times of pandemic, 'ghost areas'. Additionally, there are some restrictions regarding the stores still operating. An ordinance (PORTUGUESE GOVERNMENT, 2020) came into force, introducing an indicative occupation rule maximum of 0.04 people per square meter of area. In practical terms, this regulation forced the control of the maximum number of people inside the stores and that, reaching this maximum, the entry of new customers is made according to the previous departure of customers who were inside the establishment. This set of measures presents itself as extremely harmful for commercial companies, even for those that can continue with the activity. The abrupt and pronounced lack of vitality calls into question the viability of the commercial fabric. This scenario is applicable to most of the different retail typologies, as well as independent stores, national and international chains. The only exception is the food retail stores that, in an early stage of the confinement, were overwhelm by an excessive affluence of clients (Marcela, 2020). Although no disruption in the food distribution system occurred, a large part of the population flowed abundantly into these commercial spaces. The fear of product breakdown led to the bandwagon effect (see CORNEO; JEANNE, 1997; HERPEN; PIETERS; ZEELENBERG, 2009), thus, justifying that affluence.

Within the measures adopted by various companies in Portugal to tackle the decrease in revenues in the framework of restrictive measures implemented to address the Covid-19, one must enhance the wide relevance of online retail. E-commerce is still underdeveloped in Portugal, especially for small businesses, unlike other western countries, such as the Netherlands and the UK, where it is more widespread (KIRBY-HAWKINS; BIRKIN; CLARKE, 2019; WELTEVREDEN, 2014). Although no extensive data is available, according to the Portuguese Statistics, in 2018, only 18,1% of the turnover of retail companies with ten or more workers comes from e-commerce (INE, 2019). Considering that this value will be lower for commercial companies with less than ten workers and that the Portuguese commercial fabric is largely composed of small companies (table 2), we realize that the penetration rate of e- commerce is still in an initial stage of evolution in the country.

Table 2: Number of retail companies in Portugal, by number of persons employed

		Year	
		2004	2018
Number of persons employed	Total	176,867	129,110
Less than 10	Total	172,808	124,722
	%	97,7	96,6
10 - 19	Total	2,757	2,843
	%	1,6	2,2
20-49	Total	933	1,061
	%	0,5	0,8
50-249	Total	307	403
	%	0,2	0,3
250 plus	Total	62	81
	%	0,04	0,1

Source: National Statistics (Available at: www.ine.pt)

Below, we will analyse the measures implemented by several commercial companies that we consider to be illustrative of the transformation carried out by companies in the sector.

Leroy Merlin

This large retailer still has permission to be operating with open doors. A small adjustment to the opening hours, closing earlier on weekdays and Saturdays and closing on Sunday. Online shopping is being actively encouraged "In a safer and more convenient way, choose to do your shopping online and receive at your home" (https://www.leroymerlin.pt/pt/comprar-online). An innovative measure was the introduction of the “Free Service Sale”, which consists of removing workers from the product exhibition space. In turn, if customers want clarification, they are encouraged to use the telephone service or online chat, even if they are already inside the store (DISTRIBUIÇÃO HOJE, 2020). This option, in addition to minimizing contact between workers and customers, also made it possible to redeploy these workers to support functions for online sales. Additionally, for hygienic-sanitary reasons, the assembly of products at the customers' home is unavailable and delivery must be made at the door of the respective home without direct contact with the customers.

IKEA

With a same retail typology as Leroy Merlin, IKEA choose another path and closed doors on 18th of March, focusing on the online sales (MONTEIRO, 2020). After online purchase, ‘Home delivery’ and ‘Click and collect’ are now point of contact between the store and the customer. The closure of physical stores led to an excess of workers. The option went through the use of the lay-off (GARCIA, 2020), taking advantage of the simplified lay-off created by the Government as an instrument to support companies, thus reducing personnel costs.

LIDL, DIA, Pingo Doce, Continente

The measures adopted by these four large food retailers differ from the remaining because they can continue fully operational and because they are of the commercial typology that did not experienced a decrease in demand in this period. As a result, most changes concerns adjustments related to workers.

Soon after the entry into force of the state of emergency, LIDL announced the need to hire 500 workers to face the exponential increase in demand for goods (JN, 2020). Likewise, the DIA group affirmed the need to temporarily reinforce its working force, having developed a campaign specifically aimed at workers in other sectors more affected by this crisis: "workers in the sectors of catering, tourism, hotels, among others, who are going through a difficult time due to the outbreak of COVID-19" (CARDOSO, 2020). At Jerónimo Martins, owner of hypermarkets Pingo Doce, another strategy has been adopted. In each store, the work teams are clearly divided into work groups that take turns every 15 days (LIMA, 2020). Behind this strategy, is the consideration that in this way, if one of the workers is infected by Covid-19 and his co-workers are forced to quarantine, another group can take his place; thus, it does not jeopardize the impossibility of opening the store due to the lack of infected or quarantined workers. In a similar procedure, the SONAE group transferred workers from BAGGA cafeterias, which have been closed, to the Continente hypermarket, both belonging to the same business group (NEVES, 2020).

Front Door Strategy

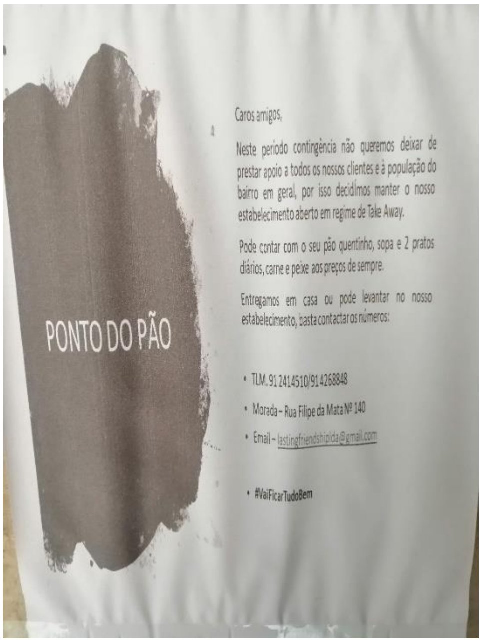
Dear friends, in this contingency period we do not want to fail to provide support to all our customers and the population of the neighbourhood in general, so we decided to keep our establishment open on a take-away basis. You can count on your warm bread, soup and 2 daily dishes, meat and fish at the usual prices.

We deliver at home or you can pick up at our establishment.

#it is going to be okay (pamphlet of an establishment in Lisbon (author translation). Figure 1)

This pamphlet was placed at the entrance door of all buildings in a Lisbon neighbourhood during the first week of April 2020 (figure 1), and this initiative mirrors with others developed in Lisbon and other cities across the country. This was the measure used by an extended set of restaurants that, in view of the impossibility of having customers inside the establishments, chose to disseminate the take-away option. The legislation introduced by the Government had as its main objective to minimize social contact; thus, the take-away allowed several establishments to minimize the loss of revenue. In addition, several formal procedures were streamlined that allowed coffee shops with minimal pre-conditions to also adopt this strategy.

Figure 1: Advertising pamphlet of an establishment in Lisbon



Source: Author (2020). Note: translation is in the above citation

Newspaper stores were also allowed to operate. On the basis of justifying the inclusion of this typology as one that may be in operation, is the consideration that access to information is an essential right in this period of social isolation. Although they can receive customers, the small size of most of these stores has led owners to adopt a strategy that we can also frame as a front door, as the entrance to the establishment is restricted, and the customer does not take the product directly but is provided by the respective seller. This extension of the establishment to the sidewalk is similar to one of the demalling strategies detected by Guimarães (2019), also in the city of Lisbon.

Discussion and conclusion

The exceptional nature of the pandemic situation and the speed with which it occurred forced the Government to react through measures unparalleled in the country's recent history and sparked the response of the commercial fabric. If the change in retail is inherent to its nature, the current speed with which it occurs is unparalleled. The introduced measures produced integrated impacts at the hygienic-sanitary, economic and social levels. This situation has put increased pressure on companies and their support structures. The changes have been taking place at a very sharp pace, which revealed the lack of preparation for a situation that, at the beginning of the year, was unthinkable. Online shopping in association with the home delivery and click and collect modalities has become an essential support to overcome the abrupt decline of sales, especially for large retailers from different retail typologies. However, infrastructures have shown difficulties to follow these strategies. For instance, like other large retailers, major retailer Auchan has assumed its website's inability to cope with the high demand its online shopping website has been subjected to (LUSA, 2020). This pressure is also felt indirectly in the companies that support the commercial structure, such as the companies responsible for delivering the products purchased through the home delivery modality. For example, the Mercadão company, responsible for delivering Pingo Doce products at home, is strengthening its team of employees (ALVES, 2020). Nevertheless, the delivery time is quite long, and this situation is similar for other large retailers, such as El Corte Inglês and Continente, where the delivery time may extend up to one month in the early stage of the pandemic (ALVES, 2020). Additional measures had to be taken in this adaptation to a sales system based on online shopping, of which stands out the reorganization of workers who, no longer being so necessary on the store front, took on a relevant role in supporting the online commerce of the respective establishments. Beside the growth on online shopping, some changes in shopping habits seem to be happening. The payment in cash was discouraged, to the detriment of payment by ATM card, preferably using the contactless method.

Even though these measures are relevant and have been introduced quite quickly, some questions must be raised, in what concerns their sustainability. Whether these measures will characterize the commercial fabric in a post-pandemic future is something that cannot be foreseen at the current moment. The mere consideration that these changes may not be sustainable over time challenges the traditional understanding of retail resilience, usually based on the understanding that changes in retail in the face of some impact are part of an adaptive approach. The adopted procedures by retail in this time of restricted mobility can hardly be classified in one the three approaches to resilience. On the one hand, some measures may be partially sustainable in the future. For instance, online commerce experienced an important boost in this period, although it may be soon to predict if this will lead to a steady evolution in terms of market share. If this scenario is confirmed it means that the investment in online commerce will be part of adaptive resilience measures. On the other hand, most of the implemented measures, such as take away or the sidewalk sales are likely to be revoked after the restriction is retracted. In this sense, those measures will better fit the ecological approach, insofar as they were introduced mainly as a defence mechanism to keep in operation. As Pike, Dawley and Tomaney (2010), referred, this approach is more related with the maintenance of the system in operation, rather than any incremental or adaptive measure.

In a final remark, some issues have been enhanced, most of which related with the relevance of retail. Firstly, the closure of a significant part of the commercial fabric transformed several town centres and high streets in 'ghost areas', thus, demonstrating the relevance of that sector in the urban dynamics. Secondly, the affirmation of retail as a key sector in this period has highlighted the need for control mechanisms to regulate it, under the risk of a distortion limiting the supply of essential goods to part of the population. The liberalization of retail planning policies in recent decades has led to difficulties in terms of the effectiveness with which it is possible to act in the sector to promote the equilibrium of commercial systems, or when necessary, to prevent their disequilibrium. In Portugal, the solution was to enact the State of Emergency, a truly exceptional situation, having been the first time that it came into force in the country's recent democracy. Thus, there is an urgent need to rethink retail planning policies, considering the relevance of this sector to society.

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