

Retailers under Pressure of Faster Adaptation to the New Marketing Environment

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Abstract

We are witnessing new trends in retail and shopping, health pressures, social distancing and self-isolation within the current pandemic challenge. Patience has new dimensions and retailers are challenged to ensure that consumers feel in control of their new CX. There is a real need of adequately communicating, avoiding misinformation, and living together as a society. The new marketing environment is putting consistent pressure on retailers to better understand the new risks and to take the necessary actions accordingly.

Keywords: New Trends in Retail and Shopping; Health Pressures; Pandemic Challenge; New

CX; New Risks; Supply Chain

JEL Classification: L81, L86, M31, Q55

New Trends in Retail and Shopping, Health Pressures, Social Distancing and Self-Isolation within the Current Pandemic Challenge

We are all consumers, and our consumption behavior is in full change, especially within the context of the current COVID-19 outbreak (caused by the novel coronavirus SARS-CoV-2) weighing on our lives, our businesses, our communities. Till the emergence of this most pressing current general situation, the new seven-part report of Valtech, known for providing clients with the tools and technologies which create value, build relationships, and grow revenue (from connected experiences to commerce platforms), revealed interesting key findings, such as: the majority of consumers want supply chain visibility requiring brands to be more transparent to justify consumer purchases (80%); long lines determined the abandoning of the shopping trips (70%); if an online retailer offered adequate incentives (like free returns, an immediate refund and didn't require label printing) consumers are more likely to shop with such a retailer (56%).

Analyzing channel trends in Consumer Packaged Goods (CPG) in Q4 2019, Information Resources Inc. (IRI, US) underlined, among other aspects, that:

- Store choice among consumers are continuing to be guided by convenience and value for the money, store selection process (total population) looking as follows: Lowest everyday prices (94%), Good sale prices (94%), Convenient store location (92%), Allowing to fill the basic needs at the lowest possible cost (92%), Quick and easy in-and-out (90%), Assortment that allows for one-stop shopping (86%), Strong loyalty card discount program (75%);
- Key drivers of online shopping remain time and cost saving, online shopping value perceptions (total population) looking as follows: buying grocery products online is a time saver (40%), trust that online grocery orders are fulfilled with care (37%), buying grocery products online saves money (32%). (Driggs, 2020)

On March 19, 2020, the above mentioned IRI – in partnership with Boston Consulting Group (BCG) Henderson Institute – released a new “COVID-19 Impact. Consumer Spending Tracker”, highlighting: how rapidly are changing not only consumers' behaviors, but also those

of governments and businesses, within the context of the acceleration of the COVID-19 outbreak in Europe and the United States (U.S.), this being reflected in consumer purchases in Italy, France, U.S., and UK; the dramatically spiking of the Paper Products, Home Care and OTC (over-the-counter drugs available without a prescription) Healthcare purchases across all markets as have Packaged Food; the significant stockpiling which began in U.S. in the week ending 1 March 2020; how the mentioned trends impacted most strongly the MULO (which includes: Grocery, Drug, Mass, Club - excluding Costco - Dollar and DeCA retailers) retailers, but also the convenience players in the U.S.; the particularly high spikes seen at certain sub-categories such as Home Care and OTC Healthcare.

Also this year, for instance, we have seen how the unfortunate association of Corona beer with the new coronavirus is already a case study for brand management experts, within the context in which the beer-drinking consumers either would not buy now this beer under any circumstances (38%) or were confused (16%) about whether there it has a connection between this beer and the current outbreak. The reputed Adweek also underlined the significant increasing of online searches.

An US pandemic planner and crisis management expert (founder of Emergency Management & Safety Solutions in San Francisco, Regina Phelps advises companies like Whole Foods, Nike and Starbucks on crisis management plans, including possible pandemics) recently told “CNBC Make It” that: “Right now, people are doing incredibly silly things”. What it is understandable but unnecessary and it can become expensive, in the expert’s opinion. (Scipioni, 2020)

Given the uncertainty around this new coronavirus more consumers will likely turn to online shopping revealed a February Coresight Research which polled US internet users, as shown in the figure below: (Kats, 2020)

US Internet Users Who Are Currently Avoiding vs. Will Avoid Public Places/Travel if the Coronavirus Outbreak Worsens in the US, Feb 2020		
<i>% of respondents</i>		
	Currently avoiding	Will avoid
Public transportation	49.3%	73.1%
International travel (e.g., vacations, business trips)	47.4%	68.2%
Shopping centers/malls	47.2%	74.6%
Movie theaters	41.9%	66.6%
Medical centers/hospitals	38.9%	50.6%
Community centers	35.5%	56.9%
Restaurants/bars/coffee shops	35.3%	60.5%
Shops in general	32.7%	52.7%
Sports events	32.0%	58.8%
Other entertainment/leisure venues	21.6%	40.7%
Schools/colleges	21.1%	39.3%
My workplace	11.1%	17.0%
Other	2.4%	1.4%
<i>Note: currently avoiding n=532; likely to avoid n=1,121; ages 18+</i>		
<i>Source: Coresight Research, "Coronavirus Briefing: Flash Report," Feb 28, 2020</i>		
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Figure no. 1: US Internet users who are currently avoiding vs. will avoid public places/travel if the Coronavirus outbreak worsens in the US, February 2020, Coresight Research

Source: Kats, R. (2020). Coronavirus Is Changing How Consumers Shop, eMarketer, Mar 10 (work cited)

Also in US, as underlined by eMarketer, other aspects were observed such as: limited delivery availability for household items and groceries from Amazon Prime; (on the basis of Nielsen data) the stocking up of unexpected CPG (like oat milk, rather than water), and the sales' increasing of health-related CPG (household maintenance masks, medical masks, hand sanitizer, thermometers, aerosol disinfectants); (on the basis of meal-planning service eMeals data) week-over-week increases both in the orders' number submitted to eMeals grocery partners (Amazon, Instacart, Kroger, Shipt, Walmart etc.), and of the purchases of specific products (like disinfecting wipes, ibuprofen, and chicken noodle soup).

On the other hand, on Mar 10, this year Business Insider informed that – according to CNBC – Amazon's R&D group called “Amazon's Grand Challenge” (which is part of the big tech firm's cloud division “Amazon Web Services”) has been working (within a secret years-long initiative “Project Gesundheit”, Gesundheit meanings Health in German) to develop a vaccine as a cure for the common cold (which is caused in about 75% of cases by a class of virus known as rhinovirus, being already identified by scientists 160 different strains of this rhinovirus). (Finley, 2020) In the opinion of Business Insider Amazon will continue leaning into its drug R&D efforts (which are spanning from pharmacy to care delivery to health insurance) further, a recent example being also the rolled out of its Amazon Care telehealth service to Seattle-based employees and the fact that its well-known Alexa (the voice-enabled virtual assistant) was updated so as to answer questions about a significant number (1,500) of the most widely prescribed drugs and their interactions. Let's wish (as consumers) them good “Gesundheit” also on this way!

A few days later, Business Insider also informed that:

- After Amazon began publicly offering to license the tech to third-party retailers, the first retailer which announced plans to deploy e-tailer giant's autonomous checkout technology at some of its stores was OTG (beginning with one of its Cibo Express Gourmet Markets), a hospitality group focused on airports, and having 100 locations across 10 airports (these locations offering food, health, beauty products, and electronics);
- According to The Wall Street Journal, Amazon is looking to bring Target and Walmart (which don't intend to be in) into the fold/ open source organization called Dent (allowing the use of the downloaded Amazon's software as they like without collaborating directly with Amazon) and formed last year (Dent having access to some of the technologies enabling to operate Amazon's Go stores). (Keyes, 2020) Business Insider also presented a store concept square footage comparison: Walmart's Supercenter – 179,000 square feet; Whole Foods – 43,000 square feet; 365 – 30,000 square feet (365 being the Whole Foods' chain of budget grocery stores having a special focus on private labels and lower prices); Amazon Go grocery 20.400 square feet; Amazon Go Original: 1,800 square feet (170 m²).

And this within the context in which the ecommerce giant Amazon (which is known as having more than 150 million paid Prime members globally) opened recently in Seattle its first full-size cashier less grocery store (10,400 square feet; stocks roughly 5,000 items, including fresh produce, meats and alcohol, everything being priced singularly; there is also a self-service

coffee bar), this Amazon Go grocery (Amazon work on it for five years, and it is in the Amazon corporate headquarters' backyard) requiring no human interaction (only a couple dozen people help stocking shelves and answering shoppers' questions if it is necessary), Amazon's technology tracking shoppers picking up and bagging their own produce. (Thomas, 2020) CNBC also showed, among other aspects, that according to analysts *Amazon's rivals* also moved very quickly and mimicked it: *Walmart's* wholesale division tested cashier-free technology at Sam's Club Now (a Walmart's store in Dallas); also in Texas, in Irving, near its corporate headquarters, *7-Eleven* opened a 700-square-foot cashier less store as a pilot test and only open to employees (7-Eleven has more than 11,000 convenience stores in North America); AiFi and Grabango (two tech start-ups) are working on autonomous systems for *other Amazon's competitors* (big retailers).

Also according to eMarketer, Amazon is continuing ranking as the No. 1 US ecommerce retailer and gaining market share (from 37.3% in 2019 to 38.7% this year), extending its lead. With regard to the four years period 2017-2021 Amazon's 2020 US retail ecommerce sales are forecasted by eMarketer as rising higher than the expected overall growth rate for US retail ecommerce sales (see the figure below). And this within the context in which there is a significant difference between Amazon and the other competitors included in Top 10 US companies ranked by retail e-commerce sales share, 2020 (see the next figure below).

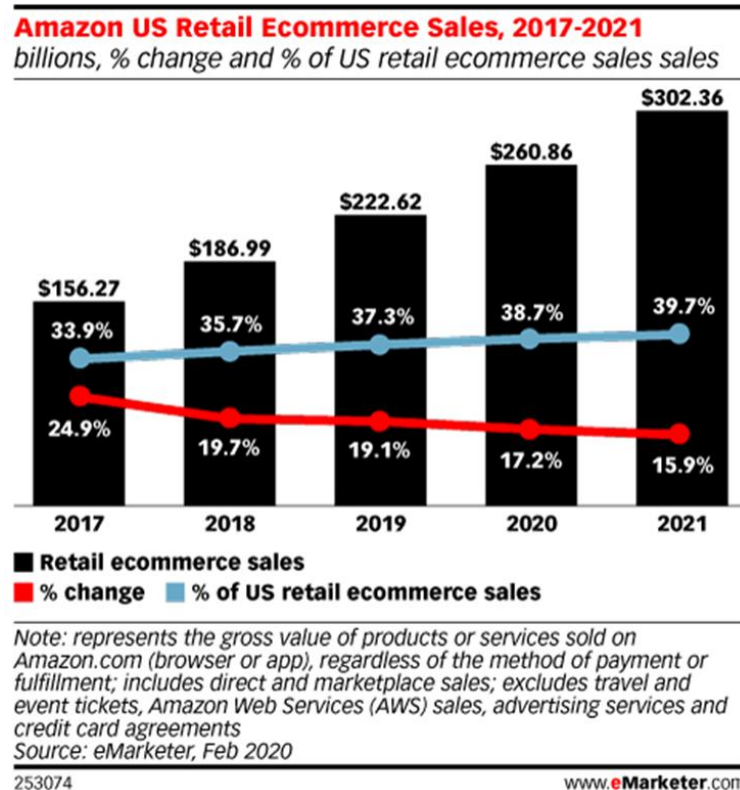


Figure no. 2: Amazon's 2020 US Retail Ecommerce Sale, 2017-2021
Source: Amazon Remains the Undisputed No. 1, eMarketer Editors, Mar 11, 2020 (work cited)

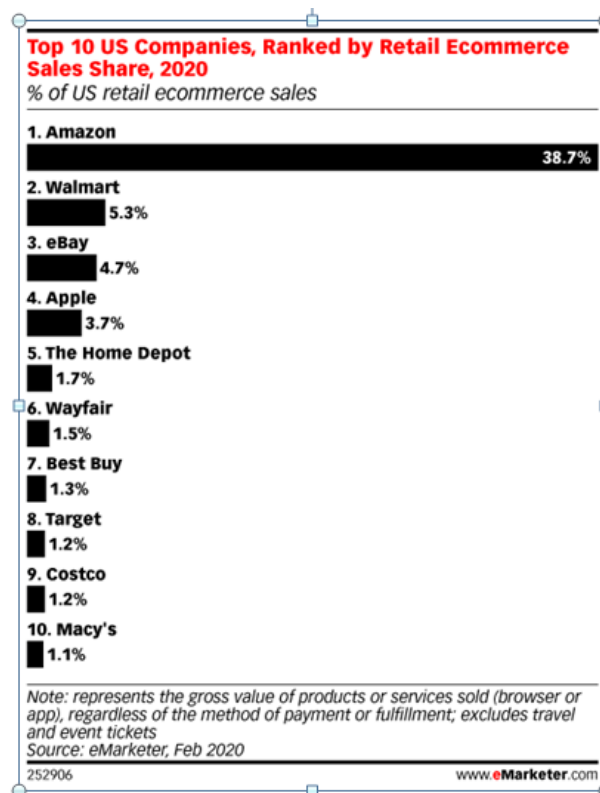


Figure no. 3: Top 10 US companies, ranked by retail e-commerce sales share, 2020
Source: Target Cracks Top 10 US Ecommerce Ranking, eMarketer Editors, Feb 28, 2020 (work cited)

A recent eBook from Repsly focused on maximizing the value of a store visit made by the sales representatives (field team) showed that: because one of a brand's competitors provided a better in-store experience, customers (57%) have stopped buying from that brand; shoppers make their decisions based on a brand's presence in the store (40%).

Commenting within a RetailWire's discussion, Lisa Goller, Content Marketing Strategist at BrainTrust, underlined the massive demand for e-grocery options among consumers created by social distancing and self-isolation, essential to succeed in the new retail landscape being now convenience, variety and... BOPIS and home delivery as prompt service, what is very good for local stores (if they invest in speed and logistics partnerships so as to serve consumers both in their neighborhoods and at their doorsteps). Within the same framework her colleague Ken Morris, Retail industry thought leader, added that delivery and BOPIS will increase along with local fulfillment, and even after this current pandemic challenge ends the return to the old shopping habits will not be complete. (Ryan, 2020)

Patience and retailers' challenge to ensure that consumers feel in control of their CX

There is no doubt that within the current pandemic challenge we must choose to better understand what is going on, adequately thinking about the problems we are facing, trying to make life less difficult for each other. Speaking about retail our thoughts go out to some wise

words, such as: “The magic formula that successful businesses have discovered is to treat customers like guests and employees like people” (Tom Peters); “Don’t find fault. Find a remedy” (Henry Ford).

According to an analysis of lines and waiting times in an environment controlled by services firms made by Professors K. Douglas Hoffman and John E.G. Bateson (results revealed in a book published in 2016) it is possible to manage consumers’ perceptions of waits (while CX is unfolding) by having a profound understanding of the consumer behavior, and ensuring that consumers feel in control of their CX (understanding principles like: uncertain waits are longer than known, finite waits; unexplained waits are longer than explained wait; anxiety makes wait seem longer, and this because it expands consumers’ perceptions of time; preprocess waits feel longer than in-process waits because consumer is largely unoccupied, while post process waits feel longest of all because consumer is anxious to take control back; unfair waits are longer than equitable waits, because all unfair systems are attacking consumers’ feelings of predictability and control), also taking into account how the context in which time passes is influencing the perception of time. (Douglas Hoffman and Bateson, 2016)

With regard to consumers’ anxiety (as we seen above it expands consumers’ perceptions of time, this perception being influenced at its turn by the context in which time passes), considering the current pandemic context, we made recently (while interpreting an approach of a reputed MECLABS Institute’s representative) reference to the fact that anxiety (a mental cost) is influencing the increasing of consumers’ purchasing, marketers being accordingly under the pressure of taking the necessary immediate and mid-term actions at the level of the different both supply chains (which in general are focused on increasing sales through a better understanding of how customers behave) and value chains (which in general are focused on generating and capturing value in the whole chain), also considering the applications of PEST analysis revealed in the specific sectors’ framework. (Purcarea, 2020)

On the other hand, in November 2018, other researchers (from: Wharton School, University of Pennsylvania, Philadelphia, US; Tsinghua-Berkeley Shenzhen Institute, Tsinghua University, China; Business School, National University of Singapore) demonstrated how customers’ in-queue abandonment behavior (becoming impatient when waiting in queues) can be rational (customers being more patient in slower shorter queues, than in faster longer queues) because of learning, but due to different factors (such as: limited experiences, variation in time, prior belief, experience with other systems etc.) they may never learn perfectly. (Veeraraghavan, Xiao and Zhang, 2018) In their approach of understanding customer impatience and abandonments from the perspective of information increasing and learning, these researchers considered linear waiting cost, starting from two components of the waiting cost (the alternative waiting cost, which are reflecting the actual value of time, being approximately linear; the psychological waiting cost, which are subjective feeling of impatience, being strictly convex).

Tensator Group Ltd., known for being a crowd control and queue management solutions specialist since 1881, analyzed the UK retail environment from the point of view of the psychology of queuing, its research results revealing interesting aspects such as: people aren’t prepared to wait more than 6 minutes in a supermarket queue (44% of respondents); when queuing in supermarkets people (over a quarter) have the least patience; the top frustration is the so-called “queue jumping” (92% considering this habit as “very annoying”). Lane regret, queue

frustration, (with regard to the queue jumpers) first come, first served conflicts, and customer walkaways are considered common issues which are found in queues, but these issues can be minimized with the help of the queue management systems.

In Germany (as we find out thanks to the reputed EHI Retail Institute), a study conducted by Reflexis Systems GmbH, Düsseldorf, revealed that: customers are unwilling to wait more than 5 minutes (78% of respondents), to become dissatisfied and consider leaving taking a little longer; it is usual for customers to getting their needs met immediately, and this because of the increasing blurring of the boundaries of stationary shops and online (for instance, the delivering of customers' purchases to their doors within a few hours and enjoying the benefits of the Click-and-Collect service without waiting); customers still want however to be served from person to person (63%, their shopping satisfaction depending on well-trained, knowledgeable and friendly branch employees in the store; an important role here have the intelligent task management systems which can ensure the adequate deployment of the employees to the right place and at the right time, reducing this way waiting times without incurring additional personnel costs). (EuroShop, 2020)

The new CX – Sanitation, adequately communicating, avoiding misinformation, and living together as a society

A recent RetailWire's discussion on the topic of how US retailers ensure stores are coronavirus-safe brought to our attention significant experts' opinions which revealed that: at times like this communication is vital, being necessary to do what everybody can with what everybody know/have, and continuing (Georganne Bender, Principal, KIZER & BENDER Speaking); as everyone has a responsibility to help ensure that the aggressive virus doesn't spread and to manage the increase of the anxiety, retailers should make the same thing like all major corporations, being open and transparent with their preventative measures (Brandon Rael, Director, Alvarez & Marsal); retailers must show they have their customers' safety in mind, communicating accordingly (Ricardo Belmar, Sr Director, Retail Transformation Specialist, Infovista); they have few available responses, such as visible wipe-downs, keep ill employees home, or lock the doors (James Tenser, Principal, VSN Strategies); as the new CX is Sanitation, in order to assure customers that retailers cares for both customers and personnel safety, in stores must be present visual reminders of sanitation oaths (Cynthia Holcomb, Founder and CEO, Prefeye - Preference Science Technologies Inc.); as sanitizing (cleaning regularly) all aspects of the store and communicating retailers' efforts to protect their employees and customers are keys, if the fears continue and even escalate retailers must increase at the same time theirs online operations (Richard J. George, Ph.D, Professor of Food Marketing, Haub School of Business, Saint Joseph's University); retailers can take a lead in helping society learn that we all depend on others to help keep us all safe, going beyond extra cleaning of stores, facing the reality's dilemmas like how to balance things like re-usable cups (which are environmentally damaging) with the presence of this novel virus (which is life threatening), and how to treat each other better and focus living together as a society (Doug Garnett, President, Protonik). (Ryan, 2020)

Of course, while communicating with their customers retailers need a better understanding of the fact that an essential part of a proper CX strategy is adequately charting their customers' experiences on mobile, being well-known that convenience and speed are what customers are wanting by using mobiles, expecting positive experiences ensured by retailers' mobile platforms (through a retailer's mobile site or an app). (Balkhi, 2020) And speaking about mobile it is also useful to remind that as highlighted very recently by Business Insider consumer smartphone upgrade cycles in US, for instance, will be disrupted by the shutdown of the well-known wireless carriers' stores (AT&T, T-Mobile, Sprint) within the context of the current coronavirus pandemic, many US consumers preferring to interact with devices in person and to ask sales representatives for guidance, being likely to not transitioning from in-store to online, and to give up buying new phones. (Chitkara, 2020)

And as another recent RetailWire's discussion confirmed: it is the right time to monitor and open new social media communication so as to support both workers and customers, getting creative (Michael Terpkosh, President, City Square Partners LLC); retailers can protect their employees from uncomfortable situations by also by posting purchase limits, information on when deliveries are expected, crowd control, limited hours etc. (Patricia Vekich Waldron, Contributing Editor, RetailWire; Founder and CEO, Vision First). (Anderson, 2020) This is very useful within the general context of facing misinformation on most social media platforms, as shown recently by eMarketer which underlined, among other aspects, the joint statement with regard to the banding together to fight COVID-19-related misinformation announced by the major social platforms Facebook, LinkedIn, reddit, Twitter and YouTube, along with Google and Microsoft. (Enberg, 2020)

There is no doubt that in these uncertain times a critical role is played by the food retailers (which are the backbone of the food supply chain, and need to stay calm and execute rigorously their job of serving as reliable sources of both food and essential items for people across communities), McKinsey's representatives recommended recently six actions (the first four being urgent, and the last two being more focused on the long term) these retailers should take to help their communities, employees, and business: protect both employees and customers (workplace and store safety; an environment fostering social distancing or isolation to protect the vulnerable; prepared for worst-case scenarios); secure business continuity; get a granular view of the local reality; simultaneously manage demand and supply; transform your business model to ensure that it is tech enabled and future proof (Stores, Supply chain, Merchandising, E-commerce, Head office); boldly reshape retailer's ecosystem, including through mergers and acquisitions. (Aull et al., 2020)

It is interesting to note within this framework, that in US:

- As shown by a McKinsey's March 2020 Survey looking at US consumer sentiment during the coronavirus crisis (on the basis of data collected in March 16-17, 2020): US consumers are optimistic but are already spending carefully and more less than before (1/3 of them already reporting reduced income), also expecting to spend more only on must-have category, and as the US shifts to consume news and media (according to the ranking there is an increase in: live

news; movies or shows; reading news online; TV; texting, chatting, messaging; video content; social media; reading for personal interest; video games; online groceries; reading print news) behavior is changing; (Bhargava et al., 2020)

- As shown by Supply Chain Quarterly, on February 24, 2020 on the occasion of a Conference of the Retail Industry Leaders Association (RILA) the Chairman of the Data and Analytics company Resilience360, David Shillingford, spoke (on the same day mentioned above) before supply chain professionals, advising them to be aware of: the significant potential global economic impact of this new coronavirus; the significant affectation of the demand patterns by it; the fact that uncertainty is one of the most challenging aspects to managing this coronavirus outbreak; the fact that how well an area is able to respond and recover from this coronavirus may be determined by other large socioeconomic factors; the need of adequate response measures (to talk to your procurement team with regard to what your suppliers are facing; to map your supply chain; to reach out to suppliers; to go beyond historical demand by seeking out and using adequate sources of demand data; to start embedding risk management practices in the supply chain operations; to wash your hands, taking care this way of yourself, your team, and your internal and external partners); the need to collaborate with both supply chain partners, and competitors.

Instead of Conclusions

In our last issue from December 2019 we underlined the changing consumer behavior and retail revolution accordingly, retailers' focus on rethinking CX within the new imperative for customer obsession, bridging the gap between customer expectations and CX strategies within digital transformation, new shopping behaviors and values, Omni experience, in-store personalization, and retail's convergence. We showed that there is no doubt about the real need of caring for customers and inspiring their loyalty. (Purcarea, 2019)

In the present uncertain times, as very recently highlighted in Adweek, retailers' challenge in the coming months is to be well-equipped to manage a long-term disruption to their business, pivoting to ecommerce and alternative marketing solutions representing a possible approach within the measures taken by governments and companies to contain the coronavirus. (Klara, 2020) On the other hand, as also very recently highlighted in eMarketer, the Vice President of eBusiness and ecommerce at agile agency Scrum50 argued that: "Those that have a strong ecommerce presence will do their best to shift as much foot traffic as possible to their website. It seems unrealistic to expect retailers to make up for all of their in-store revenue through ecommerce sales, so a lot of retailers will take a hit. How big of a hit will depend on how long the crisis lasts... Retailers can test and learn new ways to sell inventory and quickly meet new demands. It's a forgiving time to take some risks". (Kats, 2020)

Usually, calculated decisions are taken on a daily basis, different personal factors (like the perception of a situation, past experience in similar situations, and person's personality) determining a person's risk-taking propensity (the balance between risk-avoiding and risk-seeking). (Furnham, 2020) As also shown in European Financial Review, an internationally

recognized strategist of the multipolar world and the founder of Difference Group attracted the attention that old risks (which are not yet fully contained) could resurface along with the new risks (which are evolving), and over time the human and economic costs will compound dramatically, if the containment measures will not be effective in the early phases of the virus outbreaks. (Steinbock, 2020)

Facing the unknown both our daily lives and businesses have been affected by this new outbreak urging for a better understanding of the new risks and the necessary actions to be taken accordingly. Wanting or not wanting we are testing (some of us being tested...) how we react to the unknown... Are we really learning something?

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