

Challenges of the modern retail trade

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Abstract

The retail space, as a crucial factor influencing the customer's feelings, continues to be under great pressure of adopting and embedding digital processes, while supporting the food education, the fight against waste, and the respect for the environment. Today's shoppers are turning to their mobile devices throughout the shopping experience, their smartphones becoming more integral in their daily lives, while businesses are choosing among many different ways to make the in-store experience mobile-friendly, taking advantage of this significant touch point. The evolution of the modern retail trade in Romania continues to be spectacular in what concerns competing in offering customers consistent experiences whether they interact with a brand in-store, online or via mobile. by delivering them content fast and seamlessly across all these channels, while also not forgetting that the foundation of retailing is understanding what customers want and need, and consequently developing a deep understanding of the decision journey that the new shoppers undertake. The evolution of the mobile phones in Romania is also spectacular, consumers becoming step by step more preoccupied with the features and technological qualities of their smartphones, and this is offering opportunities for stores to experiment and innovate.

Keywords: Future Food District, Food Education, ERA Hall of Fame, In-Store Mobile Marketing, Modern Retail Trade

JEL Classification: L81; M31; M37; O14; Q55

Expo Milano 2015, the year's most talked-about event, and most successful.

**The "Future Food District", the culture of food, the food education,
the fight against waste, and the respect for the environment**

As we underlined in the last number of our RDC Magazine, "Expo Milano 2015" confirmed the opening for an intercultural journey offering ideas and shared solutions, and "SHOP 2015" was challenging indeed to reflect at the retail space as a crucial factor influencing the customer's feelings, at the necessary increased focus on integrating retailers' various channels, while considering the impact of the converged lifestyle which has empowered consumers, and step by step understanding better the need of driving convenience, service, and relevant personalized experiences through the use of digital store technology. "SHOP 2015" was also a true opportunity to launch an invitation of working together to build the foundation for the "Road Map for the Store of the Future" Project. (Purcarea, 2015) And this within the framework of approaching the topic of "Distribution, the challenge of the super agility. From

following the trends to actually doing something about them”, the contents of the Agenda (as Keynote Speaker) being as follows: *Evolving and Reinventing the Supply Chain; Where We Are Today... facing “The eight essentials of innovation”; The 21st Century Retail Customer, and the Pillars of the Modern Commerce; Understanding the Buyer’s Journey, and the Shoppers of the Future; What Will the Bricks and Mortar Shop of the Future Look Like; Continuous Development of the Retail Market in Romania; Romania, an attractive country in terms of further investment; Best serve TODAY’s omnichannel shoppers, being ready for THE FUTURE... STORE.*

At the end of October this year, (Purcarea, 2015) we highlighted that as we are under great pressure of adopting and embedding digital processes (the pace of innovation being extraordinary, while performance metrics begin to include customer-satisfaction scores as a result of new or improved digital offerings and user experiences), it is our duty to reconfirm that only the passion, the competence and the perseverance of Professor Virgil Popa made it possible to build a real brand such as Supply Chain Management (SCM) for Efficient Consumer Response (ECR) Conference. The theme of this year’s SCM 4 ECR Conference (organized at the International Conference Center of Valahia University of Târgoviște on October 30, 2015) was: “The New Challenges of Digital World: Consumer Engagement in SUPPLY CHAIN MANAGEMENT for Efficient Consumer Response”. And within that context, we also remembered that the Italian architect Carlo Ratti (also a Professor at the well-known Massachusetts Institute of Technology, Boston, being Director of the MIT’s Senseable City Lab) has worked together with the supermarket chain “COOP Italia” (Italy’s largest supermarket chain, which follows the natural production chains in organizing the store’s main sections; a research commissioned by Coop Italia and Sita identified 6 eating habits which mean six different ways of shopping) by bringing to EXPO Milano 2015 the so-called “Future Food District”, a supermarket functioning within a pavilion (the “Vertical Plotter”, considered the largest plotter in the world) where EXPO visitors can purchase items while having different options such as: checking out infographics aggregating the supermarket’s data on a large wall; downloading an app (which was developed by Accenture for Coop and CoopExpo, and increases visitor awareness inside this supermarket) and typing in their preferred diet etc. Their common target was to see whether introducing processed and reinterpreted digital information (about browsing and purchasing thanks to a computerized system including the arranged at the center of one stand robotic arms which are performing acrobatics as they move apples and cups into different places) into such a food store would affect the way that consumers interact with and select food, while also providing their feedback thanks to this new forms of interaction (which are facilitated by COOP Italia’s decision to substitute the usual supermarket shelves with low and long wooden tables, looking friendlier and explaining to the customers where the products were grown, for example) with food within this unique more informative, engaging and surprising shopping experience via flat screens, displays and interactive tables. It is already known that the above mentioned “Vertical Plotter” (this version designed for EXPO Milano 2015), is a device (that moves on a vertical wall and allowing the reproduction of messages,

images, and graphics, converting in reality the received digital information) drawing on the facade Expo visitors faces of the supermarket, this way each EXPO visitor becoming part of an architectural process.



At the beginning of November 2015, (Purcarea, 2015) the well-known 24OreNews.it Event Portal (section “Italia da Gustare”) has attracted our attention by publishing a challenging message (<http://www.24orenews.it/home/in-primo-piano/14096-fame-d%E2%80%99orgoglio-prima-e-dopo-expo>) from Riccardo Garosci, President of Miur Committee “School and Food”, Expo Milano 2015, and Coordinator of the discussion table working on Food Education of the Charter of Milan (Table 14: “Food education: an investment for the future”): “Hunger of Self-Pride” - Before and after EXPO” (“Fame d’Orgoglio: Prima e dopo EXPO”). Riccardo Garosci spoke eloquently in support of the culture of food, the food education, the fight against waste, the respect for the environment and for Italy: << ... Hungry for good “things” we didn’t have for some time: optimism, good image (individual and collective), and culture... There were six months starting slowly but growing irresistibly. The enthusiasm, but even just the curiosity of 21 million visitors... But a special thought goes to the boys of EXPO. The schools whose teachers with their passionate students – ... Volunteers, tireless and smiling. To the young people who worked in the Pavilions and in the Cluster... For showing and sharing with the world that an Expo will leave in the Charter of Milan its intangible heritage: the culture of food, the food education, the fight against waste, the respect for the environment and for our country...>> Allow us to remember within this special context that Romania’s Friend Riccardo Garosci, was an inspiring Keynote Speaker for “SHOP 2015” Conference (May 3-6, EXPO Milano 2015), and

he visited Romania's food productions exhibition stands at Tuttofood (the International Food and Agriculture Show which started two days after the official opening of Expo Milano 2015).

Saint Joseph's University Professor John L. Stanton, Ph.D.,

Inducted into European Retail Academy Hall of Fame

On December 2, 2015, it was with great pleasure that we saluted and congratulated the European Retail Academy (ERA) for Professor John L. Stanton induction in the ERA Hall of Fame. (Purcarea, 2015) ERA was founded in February 2005 at the exhibition EuroShop by Prof. Dr. Bernd Hallier and some of his academic friends to support the Bologna-process and the interaction between theory and application in the field. Today www.european-retail-academy.org has links to more than 225 research-institutes for trade/marketing/ tourism all over the world. The ERA Hall of Fame selects each year one professor who stands for outstanding contributions within the international interaction of research and applied sciences. Let us recall the distinguished personalities who have been honored by ERA in the last four years: Léon F. Wegnez, Romano Prodi, Klaus Toepfer, Robert Aumann.

Hall of Fame



Prof. Dr. John L. Stanton, born in 1945 in New Jersey, USA got a BS in 1968 at the State University of New York at Syracuse and the PhD at Syracuse University in 1973. Dr. Stanton directed the Food Nutrition and Health Institute at Temple University until 1984. Since 1984 he was a full Professor of Food Marketing at the St. Joseph's University in Philadelphia, USA. Beside academia John has also worked either as a manager or as a consultant for companies like Campbell Soup, Kellogg, Kroger, Melitta and the Tengelmann Group. Dr. Stanton has authored over 100 peer reviewed articles and 10 books on food, nutrition and Health topics including a seminal article in the journal SCIENCE.

John lived and taught in other countries such as Africa, Brazil, Germany and Ireland. He has been regularly quoted in the media such as CNN. Among other activity he hosted an episode of the History Channel's Modern Marvels entitled "The History of Supermarkets". He received Teaching and Research Awards in the USA. For many years he is a member of the Board of ERA and **was also honored by the ERA-partner RAU in Bucharest/Romania.**

John Stanton's Food Marketing fits totally into the **SANABUNA initiative** of Health, Nutrition, Fitness and Wellbeing as well as the **Food Waste Management** of the European Retail Academy. His nomination highlights this focus in 2016.

Honoured personality 2016:
Prof. Dr. John L. Stanton



Source:
<http://www.european-retail-academy.org/page.php?page=halloffame>

Source: <http://holisticmarketingmanagement.ro/romanian-american-university-highlighted-by-the-european-retail-academy/>

A few days later we received the following email communication from Saint Joseph's University ((Media Contact: Colleen Sabatino '11 (M.A.), Associate Director, University Communications, 610-660-3256, csabatin@sju.edu):

<< PHILADELPHIA (December 10, 2015) - John L. Stanton, Ph.D., professor of food marketing at Saint Joseph's University (SJU) in Philadelphia, Pa., was selected by the European Retail Academy (ERA) for their 2016 Honored Personality recognition and induction into its hall of fame. A full professor at Saint Joseph's since 1984, Stanton has won numerous teaching and research awards during his tenure at SJU. He has also worked as a manager or consultant for companies like Campbell Soup, Kellogg, Kroger, Melitta and the Tengelmann Group and has authored over 100 peer-reviewed articles and 10 books on food, nutrition and health topics including a seminal article in the Journal of Marketing Research and SCIENCE. Dr. Stanton is a co-founder of the Institute of Food Products Marketing, which hosts food marketing symposiums around the world. A longtime member ERA's board, Stanton has lived and taught all over the world, including Africa, Brazil, Germany and Ireland. He is a board member at both Herr's Food Company and Frankford Candy Company, and has been featured on a number of global media outlets including CNN, Fortune and The History Channel. A New Jersey native, Stanton received his bachelor's degree from the State University of New York at Syracuse and earned his doctorate at Syracuse University in 1973. Stanton directed the Food Nutrition and Health Institute at Temple University until 1984 before coming to SJU.

About the ERA: With over 250 global member schools, the European Retail Academy (ERA) has as its scope to act as a virtual platform and as an initiator of workshops/seminars/conferences to bring more transparency about retail-research and retail-education at universities or universities of applied sciences. ERA also acts as a catalyst for sponsors who would like to contribute to reach a high level of trade (retail/wholesale)-education.

About Saint Joseph's: As Philadelphia's Jesuit, Catholic University, founded by the Society of Jesus in 1851, Saint Joseph's University provides a rigorous, student-centered education rooted in the liberal arts. SJU ranks as a top university in the Northeast, and AACSB accreditation of the Erivan K. Haub School of Business. The food marketing department was ranked 10th in the nation for specialty marketing programs by US News and World Reports. The University is also deeply committed to the Jesuit tradition of scholarship and service, earning a place on the President's Higher Education Community Service Honor Roll and the community engagement classification from the Carnegie Foundation for the Advancement of Teaching. With courses offered on campus and online, SJU prepares its more than 9,000 undergraduate, graduate and doctoral students to lead lives of personal excellence, professional success and engaged citizenship. >>



Source: <http://holisticmarketingmanagement.ro/romanian-american-university-highlighted-by-the-european-retail-academy/>

Let us also recall that on August 1, 2015, (Purcarea, 2015) we showed that: << Marcel Proust attracted our attention that: “Let us be grateful to people who make us happy, they are the charming gardeners who make our souls blossom.” Professor John L. Stanton is that kind of person, constantly advocating for virtues-led management, and promoting the universal values. Honorary Member of the Romanian Distribution Committee, Professor John L. Stanton is a well-known food marketing practitioner... Professor John L. Stanton has been a special invitee of the Romanian American University (RAU) in May 2011. Professor Stanton, an excellent communicator, delivered a „Strategic Marketing” course, relevant and appealing to the RAU students, proving advance knowledge about the topic. On May 11, 2011, Professor Ovidiu Folcuț, Rector of the Romanian American University (RAU) has awarded Professor John L. Stanton the Diploma of „Special Academic Merit”. >>

Boosting in-store engagement. The role of in-store mobile marketing

We all know that mobile phones are always with us. (Jogia, 2015) The average person spends 90 minutes a day on the phone. (Mobile Statistics, 2015) Today’s consumers take a multi-device path to purchase, 65% even starting on a Smartphone. (Marketo, 2015)

The modern retail trade is facing the challenge of in-store mobile marketing, because an actual expectation for today’s shoppers is having the ability to be an informed one. In order to find the best deals and the highest-rated goods and services available, today’s shoppers are turning to their mobile devices throughout the shopping experience, their smartphones becoming

more integral in their daily lives. (Levi, 2015) A few months ago, customerthink.com, (Laloux, 2015) for example, reminded us: << *what happened in USA with the rising of mobile searches, mobile users, and mobile media consumption; that most smart phone users connect their email to their phone and even check emails on the go; that the QR code brought about the first instance of connecting the physical and mobile customer experience; the significantly evolution of the connection and opportunity between in-store and the mobile; that up to 80% of text messages are opened by mobile users; that geolocating customers and sending them text prompts with discounts when they are in your store's vicinity is just the beginning; that according to Google 84% of smartphone shoppers will use their phone while they are in a store (8 out of 10 of these people were using their mobile phones to help with their shopping in store); that as there are many different ways to make the in-store experience mobile-friendly and take advantage of this touch point, businesses have to survey customers in-store and online in order to see what types of mobile in-store features they would be interested in receiving.* >>

A report (Smith, 2015) entitled “Mobile Coupons: Consumer Engagement, Loyalty & Redemption Strategies 2014-2019” (author Dr. Windsor Holden) from Juniper Research (which provides research and analytical services to the global hi-tech communications sector, providing consultancy, analyst reports and industry commentary) revealed the following findings: << *there will be 1.05 billion mobile coupon users by 2019, up from just under 560 million this year; the surge in user numbers would in large part be driven by increased retailer engagement with the various mobile channels; retailers were now integrating coupons into loyalty programmes to a far greater extent (while focusing on delivering coupons direct to consumers rather than relying on aggregator sites); mobile coupon deployments were benefitting from retailers restructuring their businesses to reflect the wider transition to the utilisation of online engagement channels; while the use of MMS for couponing was expected to cease, disruptive technologies such as NFC (Near Field Communications) and Beacon had the potential to boost in-store engagement in the medium term; geotargeting has provided SMS-delivered coupons with a new lease of life, with retailers seeing high redemption rates from coupons pushed to consumers near their stores; brands are increasingly leveraging the retail database to deliver targeted coupons; lack of adequate POS redemption technology remains the key hurdle to greater deployment and adoption.* >>

It is worth remembering that mobile coupons (electronic tickets – used in retail stores as part of sales promotions – solicited and/or delivered by mobile phone that can be exchanged for a financial discount or rebate when purchasing a good or service; they can also be used to attract customers to entertainment attractions and other services) are often distributed to SMS (Short Messaging Service), MMS (Multimedia Messaging Service), Bluetooth etc., customers redeeming the coupon at store or online. (MMA, 2007) The Mobile Marketing Association (MMA), the world's leading global non-profit trade association, comprises more than 800 member companies (nearly fifty countries around the world), MMA members hailing from every faction of the mobile marketing ecosystem (including brand marketers, agencies, mobile technology platforms, media companies, operators etc.), MMA's mission being to accelerate the

transformation and innovation of marketing through mobile, driving business growth with closer and stronger consumer engagement. (MMA, About) The MMA' s Mobile Couponing Committee (m-Couponing Committee) developed guidelines earlier in 2007 in collaboration with representatives from MMA member companies. At that time, the members of the Mobile Couponing Committee were the following: The Coca-Cola Company, Ericsson AB, Gavitec (a NeoMedia Technologies Company), Mobile Dreams Factory, SL ("MDF", the leading Spanish group in mobile marketing, advertising and mobile commerce, as Chair), MoviDream, Nokia Corporation, Procter and Gamble, and ShopText. The above mentioned guidelines underlined, for example, that in some cases the retailer could forward the coupon to a clearinghouse or directly to the issuer (manufacturer of consumer-packaged goods).

In December this year, the Mobile Marketing Association (MMA), approached again the topic of *"Bridging The Digital & Physical Worlds To Boost Your Marketing Effectiveness, Mobile: The Great Connector"*, (MMA, 2015) inviting marketers to go on the good way in harnessing mobile, by understanding (from MMA e-book, Volume 2 on this topic) how location data and context are coming together to enhance the entire marketing cycle. A year ago, in august 2014, the MMA, in partnership with Adidas, released the *Mobile Marketing Playbook* (which takes marketers through the process of mobile strategy development from start to finish). A month later, in September 2014, MMA attracted the attention on the need to speed the mobile advertising spend optimizing, arguing that marketing executives who choose to lead and move first will open a competitive advantage. (MMA, 2014)

Coming back to December this year, let us note that MarketingProfs (Jarski, 2015) showed that according to SIM Partners, when smartphone users are near a store 56% of them want to receive location-based offers on their phones, 34% of smartphone users wanting location-based offers in mobile wallets. Within this pledge for connecting with location-based offers, it was also underlined that mobile wallet offers drive a 64% higher conversion rate over static mobile Web coupons.

The evolution of the modern retail trade in Romania

AMRCR (<http://amrcr.ro/>), as professional association established in 2003 by a group of Romanian and international trade managers, (AMRCR, Linkedin) represents the interest of Romanian retail at European level, being also local partner of EuroCommerce and Central Eastern European Commerce Council (and also a member of Employers' Confederation "Concordia"). On the occasion of the „Mediafax Talks about Retail” Conference (AMRCR, MEDIAFAX, 2015) – organized Tuesday, October 13, 2015, at J.W.Marriott Hotel in Bucharest, by Mediafax in partnership with the Association of Large Commercial Networks in Romania (AMRCR) – the „White Book of the Association of Large Commercial Networks in Romania” has been launched. The AMRCR's representatives (Delia Nica, Executive Director and Antoniu Radu, Vice Prezident) presented different actual data from this white book, such as: the modern retail will continue the positive trend of recent years and will grow in 2015, at the expense of

traditional trade, rising to 55% of total business; AMRCR brings together major retailers in Romania (Auchan, Billa, Brico-Depot, Carrefour, Cora, Dedeman, Domo Retail, Hornbach, Kaufland, Lidl, Mega Image, Metro Cash & Carry, Mobexpert, Penny Market, Praktiker, Profi and Selgros; new members will join the association: JYSK, a furniture and furnishings retailer, and the sporting goods retailer Decathlon; there are also discussions with IKEA), with an aggregate turnover of 9.06 billion euros last year, and over 75,000 employees; the commerce accounted for 15.8% of Romania's GDP last year, having the opportunity to grow in the future, and in what concerns occupancy, 22.17% of total employment at the level of 2013 worked in commerce; according to the latest data available (2013) there are a total of 126,771 stores in Romania, fell from 129,875 units in 2012, at the level of the same year, 2013, most of these, namely 118 581, being stores with small area of less than 120 square meters (it is also worth remembering that according to the retail audit company Vektor Marktforschung, the number of stores in Romania independent trade fell from 63,301 units in 2013 to 58,836 units in 2014, a reduction of nearly 4,500 units – Tanase, 2015), while the international retail chains stores raised to retail 1,353 in 2014, compared to 1,103 the previous year recorded version (so more with 250 units.); the modern trade accounts for about 25% of retail space for sale in Romania in 2013, 44.5% returning to traditional trade and 30.5% to HoReCa (Hotel, Restaurant, Catering); as shown above, the modern trade will increase this year and will reach 55% of total turnover, compared with 45% for traditional trade, while last year the ratio stood at 54% for large retailers and 46% for those in the traditional trade; since entering the Romanian market large chains have invested amounts which are at the level of billions of euros; recent years have seen a trend of FMCG retailers entering the settlements increasingly smaller, and some AMRCR members even took the initiative to open stores in rural areas; among major retailers, Kaufland (23.68%), Carrefour (13.5%) and Metro (13.29%) have the highest share in the above mentioned AMRCR members' turnover.

Combining the information regarding the AMRCR aggregate turnover of 9.06 billion euros last year with the one referring to the fact that the modern retail arrived in 2014 to hold a share of 54% of the market value, this means that FMCG total market value is about 16.36 billion euros (in AMRCR data are not taken into account Lidl network sales). (Progresiv, 2015) As shown above, according to preliminary information, the share of modern retail will increase to 55% in 2015. Let us also note that in terms of geographical dispersion on the national FMCG market in Bucharest are a third of the approximately 1,600 modern shops, Bucharest being the only city in Romania which managed to attract all international trade networks present in our country, while the counties with the highest presence of these large networks are Ilfov, Brasov, Cluj and Timis. The above mentioned white book also contains information and analysis that determines the potential impact of legislative changes on the agenda of the Government, such as the one on the closing hypermarkets on Sunday or the other one obliging retailers as a share of Romanian products in the categories meat and fresh fruit and vegetables be at least 51%.

On the other hand, according to IKA Romania (IKA, 2015) – RetailerAnalysis, (IKA.Progressive Magazine, 2015), the total current number of shops (1,717 international retail chains stores) per channel type in November 2015 was as follows: *Cash&Carry* – 54; *Discount Store* – 366 (356 in March); *Hypermarket* – 182 (177 in March); *Proximity Store* – 606 (504 in March); *Specialized Store* – 80 (72 in March); *Supermarket* – 407 (377 in March); *Rural Store* – 22. Compared to the number of international retail chains stores in 2014 (1,353 as mentioned above), in November 2015 they increased with 364.

Instead of a Conclusion

In Spring this year we ended our article with this final comment: ... *“the Romanian retail market will also be an interesting “battlefield” in what concerns competing in offering customers consistent experiences whether they interact with a brand in-store, online or via mobile, by delivering them content fast and seamlessly across all these channels, while also not forgetting that the foundation of retailing is understanding what customers want and need, and consequently developing a deep understanding of the decision journey that the new shoppers undertake.”* Allow us to add now two comments:

- according to the Country Report “Mobile Phones in Romania”, December 2015, (Euromonitor) smartphones (regarded as highly fashionable consumer electronics products; consumers are set to become more preoccupied with the features and technological qualities of their smartphones) increased this year in volume by 23%, reaching 1.4 million units (expected rising in 2020: 3.7 million units);
- we fully agree with the opinions (PSFK, 2015) expressed in Spring this year on making mobile part of the in-store experience: *the blur between online and offline is the new normal for consumers; phones and wearable devices offer opportunities for stores to experiment and innovate; optimizing the in-store experience will be key to better serving customers; there are indeed compelling examples of how retailers and brands are integrating mobile in-store.*

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