

Retail in the era of Omni channel marketing

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Abstract

There is no doubt that today's Omni shoppers looking for richer experiences have great expectations from retailers, which must be ready to take their shopper marketing to the next level, creating insight matched with relevant market intelligence. On the Romanian retail market there is a considerable increase in the number of stores at the level of international retail chains. That is why a look at the recent developments on U.S. or European Union retail markets within the context of marketing changed by the rise of social media (and not only), considering, among others, the top retail trends, how consumers want to receive brand communications from retailers, how brands can enable a seamless customer experience and so on, give us another perspective of the retail marketing environment and of the challenges ahead.

Keywords: Omni channel marketing; Omni channel retailing; Retail challenges

JEL Classification: L81, L86, M31

What today's shoppers expect from retailers

On the occasion of the Omnishopper International event (London, Marriott, 11/15/16 - 11/17/16), participants had the opportunity to better understand Gfk's thoughts on the marketing challenge presented by the rise of the Omni-shopper. Two Gfk's viewpoints are already well-known concerning: the radical retail reversal showing how today's shoppers expect retailers to queue up to see them; the need of getting to the front of the queue. That is why retailers have:

- to act in four directions: *price* (Omni shopper, Omni channel, Omni price), *experience* (creating compelling experiences to ensure repeat visit and loyalty), *convenience* (the end of the queue), *choice* (thinking beyond categories, identifying and understanding consumers' needs as they evolve); (Gfk, The shopper will see you now)
- to struggle to better define the objective and process of shopper marketing, and to not focus exclusively on the Omni shopper's journey's digital aspects (excluding the brick and mortar stores, where most shopping is still done), better capitalising on consumers' needs at the moment of their need, whether online or offline, by creating insight (matched with relevant market intelligence) so as to can win with today's Omni shopper. (Gfk, Getting to the front of the queue)

According to Gfk Romania, the number of touchpoints between brands and consumers is growing consistently, consumers looking for richer experiences beyond a simple purchasing of new products. And as competition for customer loyalty is increasingly fierce, the producers of consumer goods must in-depth understand both the customers' motivations behind their choices,

and their experiences in every touchpoint. In a press release from Bucharest, 20.10.2016, GfK stated that: the economic expectations and those concerning revenues, but also the indicators of the buying trend did not evolve uniformly throughout European space (overall, the consumer climate for EU28 fell from 13.1 points to 12.3 points from June to September 2016); in Romania, the economic recovery improves little by little Romanian consumer attitudes, the buying trend, located at 2.3 points in September, being only slightly higher than the long-term average of 0 points (but reaching 5.4 points in July, the highest value since October 2008).

Some month ago, in the Volume 7, Issue 3, of the Romanian Distribution Committee Magazine, we show that according to IKA Romania – Retailer Analysis, the total current number of shops on the Romanian retail market (2,501 compared to 1,717 international retail chains stores in November 2015) per channel type is as follows: Cash&Carry – 55 (54 in November 2015); Discount Store – 385 (366 in November 2015); Hypermarket – 188 (182 in November 2015); Proximity Store – 686 (606 in November 2015); Specialized Store – 84 (80 in November 2015); Supermarket – 417 (407 in November 2015); Rural Store – 49 (22 in November 2015). Compared to the number of international retail chains stores in November 2015 (1,717 as mentioned above), there is an increase with 784 stores; (IKA.Progressive Magazine, 2016).

Today, the situation is as follows, the total current number of shops on the Romanian retail market being 2,620 (compared to the above mentioned 2,501 international retail chains stores) per channel type is as follows: Cash&Carry – 57 (55 in September 2016); Discount Store – 404 (385 in September 2016); Hypermarket – 192 (188 in September 2016); Proximity Store – 726 (686 in September 2016); Specialized Store – 85 (84 in September 2016); Supermarket – 433 (417 in September 2016); Rural Store – 82 (49 in September 2016, a spectacular increase). Compared to the number of international retail chains stores in September 2016 (2,501 as mentioned above), there is an increase with 119 stores. In what concerns the Local Key Accounts, the total current number is 641 (IKA.Progressive Magazine, 2016).

Thinking human-connect first for Omni channel retailing success

In February 2016, French social media influencer Isabelle Mathieu pointed out that WhatsApp, Facebook Messenger, WeChat, Viber together (main messaging apps) have a wider community than Facebook, Twitter, LinkedIn, Instagram (main social networks). And a recommendation made at the beginning of December this year (Richard, 2016) starting from this fact was to start researching ways in which brands can reach customers and prospects through messaging apps. And this considering what Mark W. Schaefer (marketing consultant, author, and speaker on digital trends and marketing transformation) underlined within the context of marketing changed by the rise of social media, marketers being challenged to combat with tensions such as: discoverability vs. interactivity (getting people to find brands and interact with them without failing to fulfill people's hopes or expectations), content orientation vs. person orientation (the goal in this new world being engagement through private conversational moments). (Schaefer, 2016)

At the beginning of November this year, Chris H. Petersen, PhD, CEO of Integrated Marketing Solutions and founder of IMS Retail University, (Petersen, 2016) argued that today's retailers require new Omni channel data, metrics, and benchmarking, highlighting important aspects, such as: *as customers are the new POS in today's Omni channel marketplace (determining where they purchase, how they pay, and where they collect), retailers (their POS systems enabling and tracking all the way down to the SKU level to enable inventory replenishment, also detailing analyses of what is sold in the so-called "market basket"; their online POS system including the new dimension of shipments) are facing new business questions that will require new data, metrics and benchmarking; in order to manage retail operations, inventory and financials, retailers' POS systems have been integrated into larger enterprise systems (scorecards being focused on sales, revenue, returns, and net profit), while in order to benchmark their own performance most retailers subscribed to 3rd party sources or associations that track total volumes of goods and market consumption (also using this data to analyze distributor data to map shipments through various channels); but beyond the fact that they can this way quickly benchmark their growth against competitive indices (tracking their market share at the country and local levels), they are missing core metrics facing the Omni channel consumers with their multiple combinations of choices of purchase and delivery (buying online, shipping to home; buying online, collecting in store; buying online, collecting at locker or another location; buying in store, taking home; buying in store, delivering at home; buying in store, delivering at commuter station or other location); and because the store became a triple point (of shopping, of customer experience, and of distribution), it needs to track the paths and core metrics.*

Also in November this year, Richard R. Shapiro, Founder and President of The Center For Client Retention (TCFCR) and a leading authority in the area of customer satisfaction and loyalty, highlighted 16 top retail trends: *Amazon's phase 2 – shopping with Alexa; brick & mortar stagnates but still relevant; brands expand locations and pop-up stores; the customer experience is a sensory experience; the mall in transition; geo-fencing, geo-targeting, geo-conquesting; shopping virtually...with virtual reality and holograms; instant gratification will encourage more services; Where's my stuff? GPS trackers for delivery services will tell you; the packaging (r)evolution; subscription services will continue to change how companies do business; peer-to-peer ecommerce sites expand offerings; renting versus owning; customers trust reviews ... more than ever; membership/loyalty programs help improve the customer relationship; what does my garment do.* Shapiro's final recommendation was that retailers have to think human-connect first, then to work backwards and add the technology features that their customers are most likely to use and comment. (Shapiro, 2016)

It is also worth mentioning within this framework what a Bluecore report (based on data from a survey conducted in July 2016 of 1,174 consumers in the U.S., who made an online purchase within the past three months) revealed concerning how consumers want to receive

brand communications from retailers: via email (68%); while shopping in-store (6.9%); via text messages (5.6%), as shown in the figure below: (Nanji, 2016)

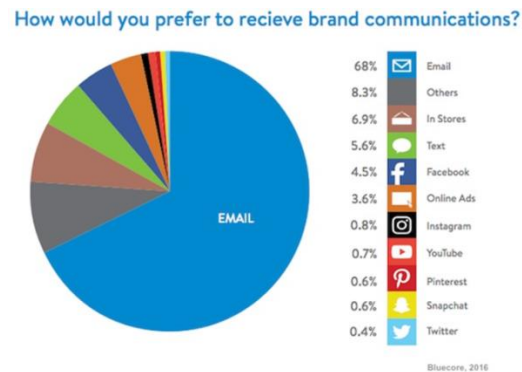


Figure 1: How consumers want to receive brand communications from retailers, Bluecore, 2016

Source: Nanji, A., How Consumers Want to Receive Retail Brand Communications, November 21, 2016, retrieved on 21.11.2016, from: <http://www.marketingprofs.com/charts/2016/31115/how-consumers-want-to-receive-retail-brand-communications?>

According to the same report, respondents in all generations considered that email is the most preferred brand communication channel, as shown in the figure below:

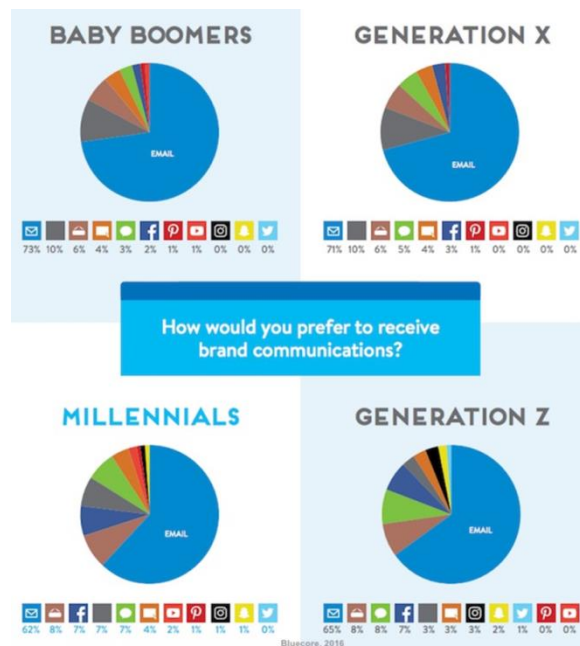


Figure 2: How consumers in all generations want to receive brand communications from retailers, Bluecore, 2016

Source: Nanji, A., How Consumers Want to Receive Retail Brand Communications, November 21, 2016, retrieved on 21.11.2016, from: <http://www.marketingprofs.com/charts/2016/31115/how-consumers-want-to-receive-retail-brand-communications?>

In the same time, we remarked that if last year, PSFK (the world's leading provider of innovation insights) described the 10 pillars propping up the new shopper experience, this year PSFK (while promoting its Future of Retail 2017 report offering transformational strategies for a customer-first business, which can exceed the expectations of a new generation of shoppers) is reflecting on how to go actually about making the new shopper experience happen. To create a customer-first company delivering on customers' wants (convenience, personalization, and seamless, Omni channel access), this involves holding and using employee development, optimized operations, and the latest technologies. (Alonso, 2016)

Different approaches of the retail challenges in the last quarter of this year

In an email sent on December 14, 2016 by Werner Studer, Executive Director of Intercontinental Group of Department Stores (IGDS: the largest association for department stores worldwide, founded in 1946, and comprising today 41 members in 38 countries and on all continents; organiser of the Global Department Store Summit – GDSS, and World Department Store Forum), we find out an update on the programme and speakers for our 5th World Department Store Summit (WDSF), scheduled for 1st - 2nd June 2017 in Toronto. According to this message, the programme is including the following topics: *Customers' New Capacities; Omni-Digital-Mobile-Offline - The Winning Combination; Leading Transformation - A Multi-Disciplinary Approach; Digital Vision; CEO Roundtable*. This made us think of different approaches of the retail challenges in the last quarter of this year, and to try to identify eventual links with the above mentioned topics.

The digital PR strategist and account manager at Preceptist underlined recently the real need of planning new e-commerce strategies so as to adapt to user needs and expectations (as they have more options than ever, and they are looking for the best possible user experience, companies being forced to strategize accordingly), 2017 being expected to be an innovator's market. (Parmar, 2016) Within this context four trends were identified requesting to do something about them: E-Commerce Market to Experience a Shift; Mobile to Be the Key Driver for E-Commerce; Active User Engagement to Drive Sales; Social Commerce. On the other hand, in the same period of time, the CMO and VP of marketing and product development at GetResponse attracted the attention that in order to make marketing work in 2017 U.S. companies must take into account some of the most critical challenges from 2016: *ad fraud is still a big problem; marketers are stuck on data collection; marketing software is too hard to use; a spotlight on geospatial data; open platforms that speak to each other*. (Brzezinski, 2016)

Also in the middle of December this year, Ryan Carney, a Senior Lead UX Specialist at GfK, underlined the step made from the "killer app" to the "killer device" (both easy and fun to use, user testing becoming important), making difference between a good user experience and a great user experience in the age of the device ecosystem, and keeping users coming back. (Carney, 2016)

In its turn, in full marsh on expanding beyond the online marketplace, Amazon will launch next summer an app designed to make it easier to connect truck drivers with shippers that need goods moved (“Uber model”), also eliminating practically a third-party broker. Targeting to control every point in a faster delivery cycle, Amazon is building new distribution centers in nearly every U.S. state, is also starting an air freight service (by leasing its own planes) to the launch of Amazon’s first drone delivery. (Keenan, 2016)

Coming back to the arguments of the above mentioned reputed Richard Shapiro (who identified “Voice Recognition”, at the close of 2015, as the sixth Customer Experience Trend 2016), allow us to remember that Amazon started in July 2016 offering Echo-only deals (in early 2015 being launched a Echo device nicknamed “Alexa”; Apple’s “Siri” rely also on voice commands) to encourage customers to shop with their signature voice. (Shapiro, 2016) As shown by Shapiro, if Phase I of Amazon’s strategic plan (all about convenience, voice versus touch) represented the beginning step in transforming CX, the retail market will be dramatically impacted by the Phase II, which will augment Amazon’s current retail dominance, by revolutionizing goods’ and services’ ordering through voice control commands (“Alexa” paying attention to our conversations, for example).

On the other hand, as highlighted by the Digital Editor for Adweek in November this year, Amazon (according to Verto Analytics’ stats comparing the top 15 retailers based on the online activities of 20,000 U.S. consumers during October 2016, and also revealing market numbers for mobile and desktop audiences, both showing Amazon - the leader in seven of the 11 categories - in the No. 1 position: (Heine, 2016)

POSITION & SUBJECT	OWNER/PUBLISHER	MONTHLY UNIQUE VISITS (M)	REACH (%)	STICKINESS (%)	TIME SPENT PER MONTH PER USER (HOURS)	SESSIONS PER MONTH PER USER (S)	AVERAGE SESSION DURATION (MIP-SEC)	DESKTOP VISITS (M)	SMARTPHONE VISITS (M)	TABLET VISITS (M)	MOBILE ONLY VISITS (M)	PERCENTAGE OF MOBILE ONLY VISITS
1. Amazon	Amazon.com, Inc.	200	81%	35%	1.42	33	3:05	1091	130	531	909	45%
2. Walmart	Walmart Stores, Inc.	193	48%	19%	0:26	8	3:14	95	66	491	581	84%
3. eBay	eBay Inc.	95.7	35%	15%	1:22	13	6:22	49.3	42	13.8	37.4	43%
4. Apple.com	Apple, Inc.	71.3	29%	7%	0:07	3	2:58	22.9	39.3	21.5	48.4	68%
5. Groupon	Groupon, Inc.	67.8	27%	12%	0:14	6	2:34	26.5	43.3	8.5	41.4	61%
6. Microsoft Store	Microsoft Corporation	62.5	25%	10%	0:15	3	4:22	49.8	13.7	3.7	12.7	20%
7. Target	Target Corporation	61.3	25%	9%	0:13	4	3:29	23.6	36.5	12.3	37.7	62%
8. Craigslist	Craigslist, Inc.	44.6	18%	16%	2:34	9	14:40	21	23.9	8.4	23.6	53%
9. Coupons.com	Coupons.com, Inc.	43.1	17%	10%	0:37	5	7:39	28.2	12.3	5.7	15	35%
10. Best Buy	Best Buy Co., Inc.	41.5	17%	7%	0:10	3	4:21	21.7	12.7	4.7	19.8	48%
11. The Home Depot	Home Depot, Inc.	33.7	14%	7%	0:16	3	5:04	16.6	13.9	6.1	12.2	51%
12. CVS	CVS Health Corporation	32.4	13%	11%	0:16	5	2:57	11	20.7	4.6	21.3	66%
13. Barnes & Noble	Barnes & Noble Inc.	30.4	12%	15%	0:34	13	2:39	22.7	6.5	2.9	7.8	25%
14. Etsy	Etsy, Inc.	30.3	12%	8%	0:19	4	4:33	13.6	15.5	9	16.7	55%
15. JCPenney	J.C. Penney Corporation, Inc.	29.1	12%	6%	0:10	2	4:40	16.1	9.7	4.3	13	48%

Figure 3: E-commerce, November 2016

Source: Verto Analytics’ stats, in Heine, C., Amazon Is Dominating Online Retail Going Into the Holiday Shopping Season. Data-rich chart shows it's a statistical rout, November 23, 2016

When it comes to a customer service request in conjunction with brick-and-mortar retailers (supermarkets, grocery stores and clothing stores) according to a worldwide study (entitled “The Digital Tipping Point: How Do Organizations Balance the Demands for Digital and Human Customer Service?”) of more than 24,000 consumers and 1,000 businesses (interviews conducted in the local language in Australia, Brazil, India, France, Germany, Japan, Mexico, the Netherlands, New Zealand, South Africa, U.K. and the U.S.), the majority of respondents confirmed they prefer to talk to a live person (on the phone or in person). (Capuano, 2016) If within such a context customers display more positive behaviors toward brand, when it comes to on line’s and via mobile devices’ service, they need to have one which is faster and more intuitive to serve end users.

According to a recent report from Astound Commerce (based on data from a survey of more than 1,000 US consumers asked about their online shopping behavior, in-store preferences, and social commerce actions), consumers’ retailer choices are influenced mainly by price (79% say it is important), free shipping (68%), and in-stock inventory (67%). (Nanji, 2016) On the other hand, it is good to better understand: how important is that a retailer’s website be mobile-optimized, respecting the way they want to be engaged, and ensuring the right user experience from any device, offering flexibility to apply for credit, manage their accounts etc.; (Kroskie, 2016) how difficult is for retailers to ensure that their website would be fast and stable during peak traffic periods (according to a recent study from eCommera), despite their agreement that innovations should lead to definite improvements, and that improving the customer experience is a primary focus of their innovation program; (eMarketer, 2016) how brands can enable a seamless customer experience by focusing on customers’ purchasing behaviors and aligning the digital and physical elements of an Omni channel strategy, considering the role of the local brick-and-mortar store in driving sales and converting potential buyers to active customers (as increasingly more and more in-store visits are driven by what shoppers saw online first); (Morrissey, 2016) how six in ten internet users in Germany (even the youngest adult shoppers, despite the fact that they are considered most digitally engaged compared to other countries) still prefer in-store purchases (according to a survey released in October 2016 by Creditreform Boniversum); (eMarketer, 2016) how across the major European markets Omni channel and online retail are at different maturity levels, the most developed being the United Kingdom and France, while the winning CPG (consumer-packaged-goods) companies (as early entrants into the e-commerce space) are already experienced in activating online shoppers, curating an online assortment, and managing channel conflict (according to a multiyear global survey conducted by McKinsey in partnership with Nielsen, being interviewed more than 100 sales executives across Europe about their customer- and channel-management practices); (Land, Rickert, and Schmutzler, 2016) how by leveraging Omni channel marketing retail marketers can take control of their customers’ journeys (given the technology platforms that capture data), providing them with an integrated shopping experience, and familiarizing them with the brand, keeping them coming back for more. (Alonso, 2016)

Conclusions

The modern retail trade in Romania will also continue to adapt to the above highlighted developments, better understanding the decision journey that the Omni channel shoppers undertake. And coming back to the same Chris H. Petersen, but to other arguments (brought by him on the occasion of the recent RVCF Annual Fall Conference), it is useful to show some of them: (Petersen, 2016)

- Omni channel (a relatively new term that emerged in about 2008) has become essential for a retailing forced to keeping pace with the changing pattern of customer behaviors related to shopping in more than one place, the future of retailing being now about how retailers must connect and transact with consumers across time and space (where they shop at a moment in time);
- That is why it is necessary to take into account that: today's retailing is boundary-less (no boundaries of when consumers shop, where consumers shop and purchase from), transcending boundaries of states and countries, while purchasing became a boundary-less journey (in scope, sources, touch points and time); consumers need omnipresent retailing; mobile smartphones enable omnipresence, boundary-less engagement; to be "omnipresent" and boundary-less requires hard work and considerable investment and infrastructure; retailers need new metrics to measure ROI beyond the POS sales transaction.

And allow us to also remember that five years ago, approaching the link between the future of shopping and the Omni channel organization, Darrell K. Rigby (a partner in the Boston office of Bain & Company; author of "Winning in Turbulence") highlighted (Rigby, 2011) that a successful Omni channel strategy should deliver the kind of revolution in customer expectations and experiences that comes along every 50 years or so (better understanding that the digital and physical arenas complement each other).

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*** The shopper will see you now. Jump the queue by anticipating today's omnishopper,
http://www.gfk.com/fileadmin/user_upload/dyna_content/GB/documents/Whitepapers/Omni_Shopper_1.8_Web.pdf

*** Getting to the front of the queue,
[http://www.gfk.com/fileadmin/user_upload/dyna_content/GB/documents/Whitepapers/Omni_Shopper_Getting_in_f
ront_of_the_queue.pdf](http://www.gfk.com/fileadmin/user_upload/dyna_content/GB/documents/Whitepapers/Omni_Shopper_Getting_in_front_of_the_queue.pdf)

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