

The Future of Retail Impacted by the Smart Phygital Era

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Abstract

Smartphones' role in improving the retail customer experience is rising within the constant disruption and transformation. The need for harmonizing the digital environment with the in-store environment is clearly recognized within retailers' struggling of adapting to the new reality and to improve the shopping experience, blending digital experiences with physical ones, keeping up with major mutations, having adequate insights from the analysis of data, and ensuring this way the retail renaissance, including by considering mobile and artificial intelligence as disruptive forces in retail. The last but not the least, retailers need to take into account the renewed interest in retail apps.

Keywords: Retail Renaissance; Shopping Experience; Customers Data; Smart Phygital; Mobile

Marketing Trends;

JEL Classification: L81, L86, M31, Q55

“Whether consumers or businesses, customers are increasingly at the epicenter of the economy, which is all about improving how customers are served.”

Klaus Schwab, Founder and Executive Chairman
of the World Economic Forum

Smartphones' role in improving the retail customer experience

In November 2017, the reputed Professor Philip Kotler wrote that he is impressed by the fact that so many citizens are simply becoming physically and mentally dependent on the online shopping. He showed, among other aspects that: compared to in-store purchasing (U.S. shopping centers, malls and store-based retailers) the rate of online buying is growing much faster; as the number of stores independent of online will be reduced by a Darwinian process of the survival of the fittest, there are some options of the surviving stores such as: offering both in-store purchasing and online purchasing, offering more customized service, building community, using BOPIS etc.; it is necessary to adequately answer to the new threat represented by Smart phones, taking into account the growing frequency and intensity with which customers want a lower price. (Kotler, 2017)

In an article published on the first day of September 2018, a Content Marketing Manager who supervises Vision Critical's blog and social media marketing program attracted the attention on the fact that: not only on the growth in both brick-and-mortar and e-commerce sales reported by well-known U.S. retailers (Target, Walmart, Nordstrom, Home Depot, reminding that according to Deloitte the retail industry's growth between 2017 and 2022 is pegged at 11.7%),

but also on a net increase of 4,000 new store openings in 2017 (recorded by IHL Group); retail renaissance presupposes not only to really understand customers and take advantage of insight, but also to improve the retail customer experience within the constant disruption and transformation, using the adequate technology. (Claveria, 2018)

Four days later, two representatives of the full-service retail design and experience agency SET argued that brick-and-mortar can be maintained as a primary touch point despite the creation and curating of the new ownable channels, by taking lessons to learn on the future of retail from the last mall built in U.S., The Mall at University Town Center (UTC) in Sarasota, Florida, which is housing 100+ stores. (Heathwood & Tauber, 2018) Opened in 2014, this Mall at UTC was also impacted by the digital and mobile paradigm shift (the convenience of all of consumers' favorite stores in one place as central business proposition being damaged by the rapid development of online shopping and smartphones), being forced to adapt to the Omnichannel (seen as a single-revenue system enabling cross shopping and returning behaviors) effect, by ensuring a digital presence which creates a seamless experience, harmonizing the digital environment with the in-store environment, minimizing customer confusion and encouraging the traffic from digital to in-store to increase.

At the end of August this year an analyst of Ihl Services, Inc. (research & investing information) made reference (while approaching the topic of "Retail's Radical Transformation/Real Opportunities" in U.S.) (Holman, 2018) to one of their reports showing that despite the projected retail growth in 2018 (+ 4,4-4,6%) "Retail Apocalypse" is still too often reported (see the figure below):



Figure 1: Evolution of retail in U.S.

Source: Holman, L. (2018). Webinar Replay: Retail's Radical Transformation/Real Opportunities, Ihl Services News, August 30 (work cited)

Two month before, in June this year, Mi9 Retail (presented as the fastest growing provider of enterprise software for retailers, wholesalers, and brands) showed that beyond the headlines with regard to "The Death of Retail" the retail sector as a whole is growing, the

unsuccess of some retailers being due mainly to the weak Web strategy, poor Omni channel execution and underinvesting in stores. And in order to survive retailers need to adapt quickly. At the end of June 2018, while approaching the topic of “Surviving the Retail Apocalypse: Foursquare’s how-to guide for designing the Mall of the Future”, the Head of Analytics and a Manager, Analytics at Foursquare (a technology company using location intelligence to build meaningful consumer experiences and business solutions, and offering hosted technology and data to build context-smart, location-aware apps), showed, among other aspects, that: as the industry leader in analyzing foot traffic behavior everywhere, they have this unique ability to observe the footfall patterns of millions of Americans during their visits, differentiating between malls and the venues inside the malls; in order to achieve the success or failure of a new retail location opening, the so-called “categorical fit” (opening venues which tempt people in by complementing the existing ecosystem) is considered to be the main factor; examining the foot traffic of a panel of U.S. users who have been active on the Foursquare City Guide or Foursquare Swarm apps (including partner apps) and visited a mall when it opened any type of venue in 2016 and 1H 2017 across all shopping malls (classified according to the Foursquare’s own system which separates out the most high and low end malls from the rest of the spectrum) within America, Foursquare’s cited report identified five tips: *to invest in the right secret weapons; to know malls’ audience, and be realistic about what works; to add the right food options (and a burger joint, which is attracting 5% more shoppers on average); to avoid hobby shops and keep a close eye on apparel (depending on the local situation); to make some big changes (expressing their optimism about malls opening lifestyle centers and other experiential elements)*. (Puetsch and Schoppmann, 2018)

Improving the shopping experience, blending digital experiences with physical ones

At the end of August 2018, Mi9 Retail added that retailers must continually improve the shopping experience, embracing the digital transformation and keeping up with rapidly changing technology, recommending not only the use of better-quality data in order to drive wiser decision-making and to consider an integrated suite for greater productivity, but also to know when to replace the legacy systems and to select a software provider built to support ongoing business growth. And very recently, on the occasion of the Paris Retail Week 2018, September 10-12 (the European global event for retail professionals bringing together at Paris Expo Porte de Versailles 800 exhibitors and 40,000 retail professionals from all over the world), Mi9 Retail attracted attention and emphasized the good qualities of its innovative unified retail suite, also remarking the opportunity offered by this Paris Retail Week to retailers and industry experts of exploring significant topics such as experiential marketing and “Smart Phygital” (the seamless integration of online and offline channels), blending digital experiences with physical ones.

The concept of “*phygital*” appeared in *October 2014* within the context in which *Lowe’s* (having at that time more than 1,835 home improvement and hardware stores and 260,000 employees) *announced the introduction by the Lowe’s Innovation Labs, that holiday season, of two autonomous retail service robots* (in an Orchard Supply Hardware store in midtown San

Jose, California; Orchard Supply Hardware – OSH – operated at that time 71 stores in California and two stores in Oregon, these neighborhood hardware and garden stores being focused on paint, repair and the backyard operates) *so-called “OSHbot”* (incorporating scanning technology first developed for the Lowe’s Holoroom home improvement simulator; developed through a partnership between Lowe’s Innovation Labs and Fellow Robots, a Silicon Valley technology company, partnership being initiated through SU Labs, a Singularity University program, Singularity University being headquartered at NASA Research Park in Silicon Valley) *in order to study how robotics technology can benefit customers and employees, improving customer experiences.*

No wonder that within this framework the main theme of the Paris Retail Week 2018 “Smart Phygital” (coming after the Paris Retail Week 2017 conference “Live Retail: Authentic and Human Commerce”, pledging for creating a genuine and more human retail experience) reflects major mutations such as: Artificial Intelligence (AI) seen as the link between IoT, robotics, virtual and augmented reality opening the window of merging off- and on-line experiences; shops (designed “like at home”, shop layout being replaced by scenography) seen as rehumanising the purchase process by digitalizing (personalization of offers being enabled by CRM, the customer being accompanied by sales staff equipped with tablets, in-shop transaction becoming invisible, while off- and on-line retail is reconciled by click and collect). As shown by Retail Design World, at the Paris Retail Week 2018 (the fourth edition of this type of event) there was a New Shopping Experience (NSE) section for 14 experiential retail pilot schemes (such as: *“virtual reality displays developed for a DIY retailer, an RFID-based in-store treasure hunt designed to entertain children, and a nutrition coach project that links recipes to shopping lists with an in-store scanning function”*) targeting the improvement of the future retail experiences.

The term of “Smart Phygital” was coined this year within the framework of the study (presented at Paris Retail Week 2018) conducted by Paris Retail Week and Havas Paris which surveyed French, Chinese and American consumers and identified five major trends believed to change future retailing (including a focus on a combined future of physical stores and digital technology): *“from the path of purchase to the path of life – consumers expect retail to be accessible all of the time; the conversational age has finally begun – 2018 marks the year of acceptance for voice assistance; from customer care to ethical manufacturing – environmental factors are now affecting customer decisions; big data, safe data and dirty data? – data has become the new ‘black gold’; new trendy discount – new ways to seduce a generation of customers whose financial means are inversely proportional to their influence.”* (Retail Design World, 2018) Findings from this above mentioned study revealed, among other aspects, that: 74% of the American respondents consider that physical shops are making an effort to adapt to their lifestyle, compared to the French (71%) and the Chinese (61%); 94% of the Chinese prefer to be able to purchase at any time and in any place, compared to the Americans (77%) and the French (74%); 83% of young Chinese (18 - 24) make purchases on their mobile phones as they

would in shops, compared to the young Americans (74%) and the young French (56%); 81% of the Chinese think that vocal assistants could very well replace keyboards or computer screens, compared to the French (63%) and the Americans (62%); 86% of the French say that everyday products are dangerous for their health, compared to the Americans (76%) and the Chinese (72%); 83% of the Chinese consider that they are prepared to pay more for a company or a brand managing their data ethically, compared to the Americans (65%) and the French (62%); 91% of the Chinese consider that there are too many intermediaries in retail trade, compared to the French (88%) and the Americans (66%). (Paris Retail Week, 2018)

The basis for Paris Retail Awards 2018 was technological innovation (three criteria being considered in the final judgement: innovation of the solution presented, efficiency on the market and profitability of initial results obtained), the service providers and the initiatives in terms of solutions for retailers being placed in different categories: CRM: From lead to customer; Digitalisation of the point of sale; Customer experience (360°); Logistics; Store solutions & design; Technology. And this within the context in which the “Smart Phygital” theme was developed in significant plenary conferences during the Paris Retail Week 2018 (Smart Phygital – agile and global retail ecosystem; Smart Instore - The future of tomorrow’s store; Smart Customer Experience - Knowing and identifying consumers; Smart Supply Chain – Understanding the developments in the sector).

Delivering adequate insights from the analysis of data

It is interesting to note that in March 2018, while stating from the very beginning that “Paris Goes Smart Phygital”, (Forhez, 2018) an Oracle’s representative argued that retailers are enabled by data, customer insights, virtual/augmented reality, machine learning and predictive analytics to make the relationship with the customer more authentic, humanized transactional, and this within the context in which the path to purchase is defined by CRM, Omni channel and bots. And among other aspects he described the interesting experience of visiting the pop-store Etam and Undiz right off the Avenue des Champs-Élysées (opened on December 16, 2017; Etam Group has 748 stores in France, 2125 in China and 262 in the rest of the world, and its Undiz label was launched in 2007). (FashionUnited, 2018)

Also recently, Repsly, Inc., a software-as-a-service company (a data-driven retail execution platform bringing together brands’ observational, activity, and sales data into one system; a retail execution software for innovative brands such as Canon, illy, and Adidas), (Field Technologies Online, 2018) underlined the importance of three key types of data (activity data, observational data and sales data) for high performing consumer-packaged goods (CPG) field teams which know how to harmonize their activities with the in-store conditions so as to make the biggest impact on sales in every account. (Repsly, 2018) These three types of data can be leveraged so as to take a data-driven approach to (see figure below): expanding in-store footprint, merchandising at shelf, executing and maintaining brand promotions, running in-store sampling events, and increasing chain penetration. These high performing CPG field teams are

using the Repls's powerful mobile app which allows them to be equipped with the necessary store-level data and customizable data collection tools capturing insights from their field.

Another interesting opinion expressed at the beginning of September 2018 was that of a retail software executive with global experience in innovating solutions for the retail and CPG industries (currently serving as SVP Americas at TXT Retail, an Aptos Company), who showed, among other aspects that: collecting and integrating customer data with other useful information is required as a first step of the necessary retailers' customer-centricity, in addition to the purchasing and browsing data already owned by them being recommendable to capture customer profile data; in order to enable companies to correctly respond to changing conditions retailers need to deliver forward-thinking insights from the analysis of data, building a broader number of adequate assortments, every assortment planning decision being informed by successfully leveraging shopper data. (Charness, 2018)

Ensuring the retail renaissance, including by considering mobile as a disruptive force in retail

Recent findings from an in-depth study conducted by Deloitte – and significantly entitled “The great retail bifurcation. Why the retail “apocalypse” is really a renaissance”– revealed that: the so-called “balanced” retailers (which account for the majority of closures and bankruptcies) are generally doing worse than either “price-based” retailers or “premier” retailers, consumers being more likely to recommend the last two retailers (which opened more stores over 2015–2017 than closing them) than those “balanced”, which is putting forward for consideration that both more in tune with the changing needs and better at meeting the expectations of consumers are the retailers at either end of the spectrum than those in the middle; there is a high correlation to income of the likelihood of making an online purchase versus buying in a store because consumers' spending behaviors across channels and categories is profoundly affected by their own both perceptions and realities of financial well-being; those retailers which will be able to offer a value proposition aligned with consumers' needs (by capitalizing on consumers' experiences of their economic well-being or lack thereof), improving consumers' access to options with the help of the exponential advancement in technology, will be those which will ensure the retail renaissance. (Lobaugh et al., 2018)

In September 2018, eMarketer selected, organized, and presented using well-known expert knowledge a new “Mobile Marketing Trends Roundup”, revealing key trends in mobile marketing today, including the impact on retail sector considering the increasing American consumers' time spent on mobile: the role of an aggressive mobile strategy to both capture mobile buying and ensure a positive CX leading to a mix conversion (online/offline), considering the evolution shown in the figure 2 below; the game-changing role in shopping played by the mobile device, eMarketer estimating that the majority of e-commerce revenue by 2021 will be generated by the mobile commerce which will account this year for 39.6% of total ecommerce sales; the small and medium-sized businesses (SMBs) need to better the Movement Science

(Verve) and the importance of mobile apps (the medium of the moment), embracing mobile shopping while also understanding the behaviors and attitudes of the adopters of m-commerce (not only of the Millennial but also of Gen Z shoppers) as shown in the figure 3 below.

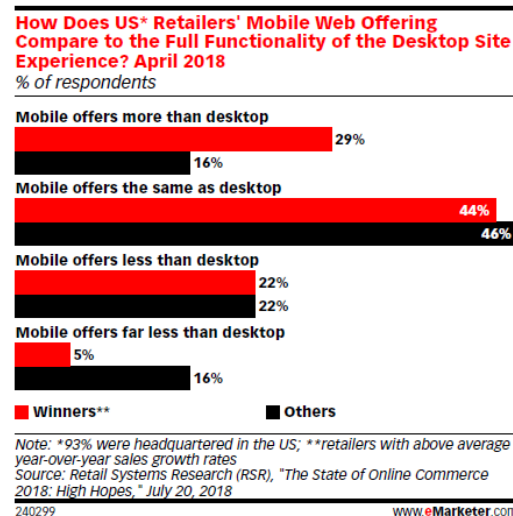


Figure 2: How does US Retailers' mobile web offering compare to the full functionality of the desktop site experience? April 2018

Source: Retail Systemes Research (RSR), "The State of Online Commerce 2018: High Hopes," July 20, 2018, cited in Mobile Marketing Trends Roundup, eMarketer, September 2018 (work cited)



Figure 3: Understanding the behaviors and attitudes of the adopters of m-commerce (according to Verve)

Source: <https://on.emarketer.com/rs/867-SLG-901/images/verve-infographic-ypulse.pdf>, cited in Mobile Marketing Trends Roundup, eMarketer, September 2018 (work cited)

At the mid of September this year, a discussion organized by RetailWire.com (the retailing industry's premier online discussion forum), with the view to see if mobile is the most disruptive force in retail since online selling began, (Anderson, 2018) revealed interesting opinions of 25 experts, such as: retail's biggest traffic driver is mobile shopping (according to a Salesforce Report – Footwear News; providing shoppers the ability of accessing information while physically shopping was the greatest impact on retail (Mark Ryski, Founder, CEO & Author, HeadCount Corporation); real-time price transparency was created by the mobile phones which are the way ensuring both the product discovery and selection process (Paula Rosenblum, Managing Partner, RSR Research); artificial intelligence (AI) is the most disruptive force in retail since the advent of e-commerce, mobile being a game changer (Lee Peterson, EVP Brand, Strategy & Design, WD Partners); the disruption was caused by the fact that the entire shopping process was taken under control by shoppers, mobile technology enabling not only the immediacy, but also the fulfillment and expectation of instant gratification, while the shopping journey became an individual journey with almost limitless paths and destinations (Adrian Weidmann, Principal, StoreStream Metrics, LLC); the smartphone made consumer more empowered than ever (Dick Seesel, Principal, Retailing In Focus LLC); digital transactions were enabled by the mobile technology to be made in places where stores couldn't even exist before (Ananda Chakravarty, Retail Thought Leader); more retailers will be push by mobile to start both using and offering omnichannel selling (Charles Dimov, Vice President of Marketing, OrderDynamics); as retailers increasingly recognize that CX (which is driven by recognition, access, information and ease) is growing in importance relative to price promotion, being enabled in mobile, there is a growing investment in mobile relevance (Phil Rubin, CEO, rDialogue).

Instead of conclusions: A Renaissance for Retail and Retail Apps, while diving deeper in customers' data

This year, in our two previous issues, we have seen that retailers are challenged to better understand the evolution of shoppers' habits and expectations, enabling them to share their feedback, covering the gap between what retailers understood with regard to consumer behavior's shift and their slowly reaction, ensuring a smart and seamless shopping experience, creating a digitally connected environment (including an emotional connection), continuously improving their capabilities associated with customer engagement (including their mobile mindset) and their predictive and intelligent marketing capabilities, translating data and insights into action, improving data driven CX. And this, of course, while continuing the constant pledge to advance on the way of following the (above and below identified) trends and doing something about them.

There is no doubt that retailers need a better understanding of their customers' shopping patterns and to deliver at least the expected CX, improving the shopping experience with the help

of data-driven analytics (diving deeper into data necessary to make more informed decisions), solving real problems faced by customers, these customers' data being turned into powerful actionable insights, as recently underlined by Mi9 Retail (for example, Mi9 Intelligence is a business intelligence system made exclusively for retailers).

In June this year, on the occasion of a CustomerThink Technology Innovation Webinar, Todd Marthaler (Marthaler, 2018) from Calabrio, Inc. (a recognized leader in contact center solutions, named a Leader in the Forrester Wave™ Workplace Optimization Suites, Q3 2016, and named a Visionary in the 2017 Gartner Magic Quadrant for Workforce Engagement Management), argued that as there is a problem with today's data (85% analytics inform sales and marketing changes, 50% rely heavily on just a single point, and 68% executives admit to a "if it ain't broke don't fix it" attitude toward change), it's time to act as shown in the figure below:

It's Time to Transform

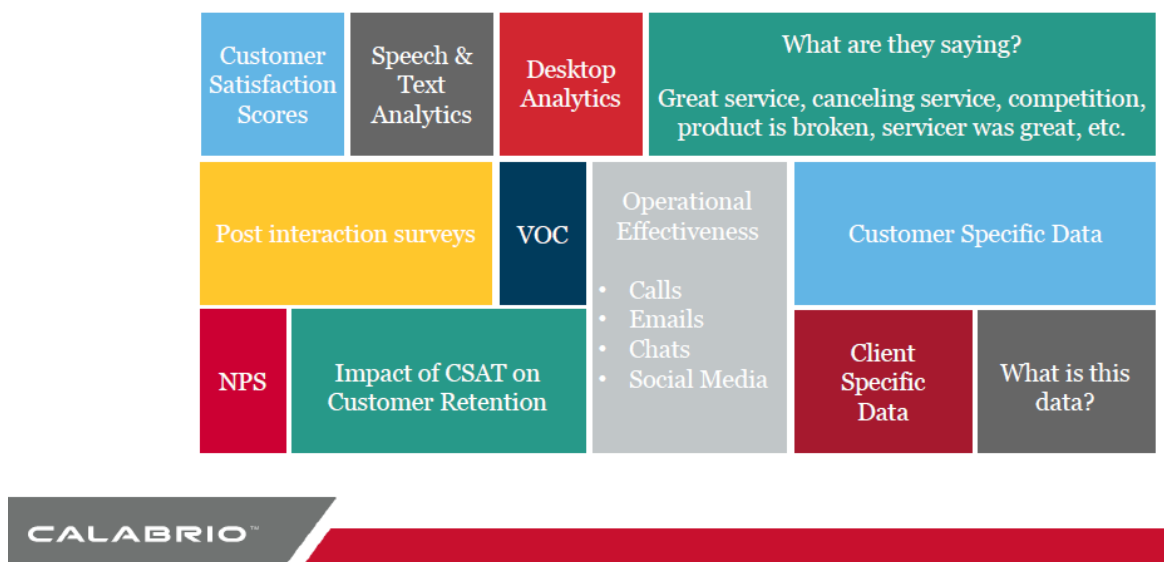


Figure 3: It's time to transform (according to Calabrio)

Source: Marthaler, T. (2018). Building the AI-Powered Customer Experience Center of the Future, CustomerThink Technology Innovation Webinar, June 21 (work cited)

At the end of August this year, an article published by eMarketer and entitled "What Shoppers Want from Stores of the Future" (Garcia, K. (2018) attracted our attention, by making reference to a survey conducted by RIS News (Technology Insights for Retail & Grocery Executives) in June 2018 about the ways US internet users changed their shopping behavior compared with five years ago, and revealing the new shopping options wanted by consumers, as shown in the figure 4 below:

What New Shopping Options/Technologies Would US Digital Buyers Like to Use? May 2018			
<i>% of respondents</i>			
	Would like to use	Using now or have used	No interest in using
Grab-and-go stores with self-checkout from your phone	59%	9%	32%
Interactive, shoppable screens	56%	6%	38%
Home delivery	45%	8%	47%
Order-only stores (products only shipped to your home)	44%	23%	33%
Virtual (computer-generated) try-on for glasses, clothing, beauty, etc.	43%	4%	53%
Augmented reality in-store (e.g., overlay furniture on floor plan)	40%	3%	58%
Remote services (e.g., using interactive screens/displays)	38%	9%	53%
In-home product order buttons so you never run out	38%	5%	57%
Drone delivery	38%	2%	60%
Subscription orders of shopper-selected products regularly delivered	36%	15%	49%
Subscription products selected for me regularly delivered	31%	12%	57%
Ordering while in a smart car connected to the internet	29%	3%	68%
Robot services in stores	28%	2%	70%
Virtual reality in a store (e.g., using VR to see different environments)	36%	2%	72%
<i>Note: ages 15-74</i> <i>Source: RIS News, "Retail 2025 Shopper Study: The Future of Retail Is Already Here" sponsored by Infosys, LG and Radial, Aug 30, 2018</i>			
240914		www.eMarketer.com	

Figure 4: What new shopping options/technologies would US digital buyers like to use? May 2018

Source:

Findings from the above mentioned survey revealed unsurprisingly that: “grab and go” technology (allowing consumers to self-checkout using their smartphones) is already the leading new shopping option wanted by consumers; 55% of respondents shopped at malls less often, and 83% shopped online more; 24% shopped more in brick-and-mortar locations, and 31% shopped in-store less. On the other hand, coming back to the survey (presented by eMarketer in September 2018 within the above mentioned “Mobile Marketing Trends Roundup”) conducted in July this year by Retail Systems Research (RSR), it was underlined that: 87% most of the surveyed retailers thought the physical store would not lose its importance in the future, 63% of the retailers with an average annual sales growth rate of 4.5% or more (so-called “winners”) even considering that their stores will become just another option among others for consumers to shop their brand; 60% of the respondents said that borrowing from what consumers like about online shopping and translating it in-store was their biggest opportunity to most improve their stores; the top choice for making their stores more relevant would be rolling out new technologies if there is enough money for it.

It is also worth mentioning that just two weeks before this article published by eMarketer the same author highlighted in eMarketer Retail “A Renaissance for Retail Apps”, (Garcia, 2018) in North America a majority of mobile retail transactions occurring via app, and mobile retail app usage being on the rise, the renewed interest in retail apps being explained not only by the continued growth of mobile commerce, but also by both marketers reducing friction and making apps more personalized, and users’ increased time spent in-app.

So let’s move from following these trends to actually doing something about them.

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