EMERALD POINTS

RETAIL IN A NEW WORLD

Recovering From The Pandemic That Changed The World

ELEONORA PANTANO
KIM WILLEMS

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Recovering from The Pandemic That Changed the World

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Retail in a New World deals with new forms of shopping that became the norm after the pandemic. The book is insightful as it provides hands-on research evidence on new trends. I fully endorse it!

Prof. Giampaolo Viglia, University of Portsmouth, UK
Editor in Chief Psychology and Marketing

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Eleonora: to my beloved uncle, Giovanni Ferraro (wherever you are)
Kim: to Alexander, Laure and Elenore

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PREFACE

Shopping in the New Normal

It's an honor to write the preface to such an ambitious volume. Even before the pandemic turned our lives upside down, we heard frantic warnings about the coming Retail Apocalypse. Bricks-and-mortar retailing was starting to look like an endangered species – and then everything stopped.

But in marketing, nothing is forever: Some traditional retailers will come back stronger than ever, and a lot of online merchants benefited (at least financially). What will retailing look like in the New Normal? In this book, the authors tackle important issues including shopping anxiety, deviant consumer behaviour, crowding, and high-tech versus high-touch approaches to ramping up the shopping experience.

Is Shopping Dead?

It's almost tempting to conclude that shoppers no longer want to shop – but of course robust e-commerce sales remind us that the interest is still there. Perhaps part of the challenge is what we might think of 'store parity'; consumers just don't see that much difference across stores. They certainly can't justify the hassles of commuting to the mall when it's much more convenient to shop at home in their pajamas.

The brands these stores stock face the similar issue of 'brand parity'. The Holy Grail for competitive differentiation is to create brand resonance where the product or service becomes part and parcel of the customer's 'life project', i.e. it plays a key role that helps him or her to define some aspect of social identity. Sneakerheads who covet the latest Air Jordans understand this; as do iPhone aficionados, wine connoisseurs, MAC Cosmetics fanatics, Corvette collectors, loyal members of Beyoncé's Beyhive or hard-core Manchester United fans.

That's all well and good for manufacturers. How do retailers play the same game? Can we also think about creating *shopping resonance* in addition to brand resonance? In today's 'always on – click here' digital retail environment, what value added does the physical store bring to the table? Hint: A lot, *if* you think about your store as more than a place to display and sell inventory.

In fact, there are numerous paths to resonance. While it seems that everyone is entranced by technology, there are high-touch solutions in addition to high-tech ones. Beacons and scan-and-go are wonderful, but they are only the means to an end: making the shopping experience pleasurable and seamless. Let's not abandon low-tech fixes in our race to automate our stores. High-touch solutions can complement these upgrades. Shoppers want to actively engage when they browse – but other than a few notable exceptions like REI (where shoppers can test the permeability of ponchos by standing in a rain shower, or check out the quality of their new rock-climbing shoes on an actual rock wall), and some scattered experiential stores like the Samsung 837 venue in Manhattan, Les Grands Magasins in France, the Gucci Garden in Italy or Farfetch in the United Kingdom, only kids-oriented stores like American Girl and Build-A-Bear provide much in the way of stimulation. If you expect to survive in the New Normal, it's helpful to remember that adults like to be entertained also.

Where Does the Person End and the Machine Begin?

Retailtainment is one way to engage shoppers, but perhaps to minimize our exposure to crowds and future infections, we will limit our in-person shopping experiences to special occasions, as more and more of our routine purchases migrate to the online space. The authors have done a lot of work in retail automation and artificial intelligence, so they are well suited to tackle the issues that we can expect in the coming years, as wide swaths of shoppers start to shake off their inhibitions against buying something from a robot.

A headline from a *New York Times* article says it all: 'Robots Welcome to Take Over, as Pandemic Accelerates Automation*:* Broad unease about losing jobs to machines could dissipate as people focus on the benefits of minimizing close human contact'.

It's no secret that we have come to rely upon computers for a huge array of tasks. Still, most of us regard our machines as an 'other'; entities made of metal and silicon that await our commands.

But the line that separates humans vs. computers is blurring rapidly.

As AI technology advances, many of us now are thinking a lot more about a fundamental question that sci-fi writers have grappled with for many years: What makes us human – and what separates a person from a machine?

Today, the question of what makes us human no longer is something fun to discuss over a few beers. Self-driving cars threaten to replace truck drivers. IBM's Watson beats chess masters and veteran *Jeopardy* game show contestants. Movies and TV shows like *Blade Runner*, *Westworld* and *Humans* that focus on the civil rights of synths, replicants and androids are centre stage in popular culture.

Many organizations now deploy robots, avatars and chatbots to perform more prosaic tasks we used to ask flesh-and-blood people to do. Sure, robots can work hard (and they don't catch viruses, at least the kind we do), so already they are starting to replace human workers who do routine tasks such as warehouse fulfillment.

But the AI revolution goes well beyond logistics and reaches deep into the front of the store as well. In Japan, SoftBank started to sell the first full-scale humanoid home assistant to consumers. Pepper is intended to provide companionship and information to users. It (or he?) is equipped with 'emotion engine' software that can read a person's emotions via facial expressions and speech and react accordingly.

But wait – isn't the ability to 'read' people the hallmark of a good salesperson? It's just a matter of time before new-and-improved versions of Pepper start to populate the sales floor.

Are marketers ready for robot salespeople?

Ready or not, they need to grapple with this question, *and soon*. Worldwide sales of consumer robots passed $5 billion in 2018, and robot shipments will increase from 15 million units in 2018 to 66 million by 2025. The market value by then would be $19 billion.

At the retail level, how will shoppers react to dealing with a non-human in a store environment? So far, consumers seem eager to embrace android salespeople. One recent survey reported that about half of the women it sampled want to use them when they shop for beauty products. This initial enthusiasm may stem from the speed and convenience of an automated process, the perceived ineptitude of many store employees to provide constructive (and especially objective) advice, or perhaps a combination of both.

Of course, it's still early days, and quite possible that a lot of this receptiveness is simply due to the novelty of talking to a metal 'person'. Once that wears off (and it will), we need to learn a lot more about the factors that will attract or dissuade customers from seeking a machine's advice. Clearly, they will have to learn to trust the suggestions they receive, for example. And certainly, there are consumer variables such as gender, social class/education, and experience with a product category that will make some of us more likely than others to embrace this new form of decision-making.

As the line between *humans vs. computers* disappears, we need to address many important ethical and strategic questions, such as these:

- How does the physical appearance of a robot or avatar sales advisor affect the likelihood that customers will trust and follow its recommendations about what to buy?
- How will chatbots and affective computing (where software detects a consumer's emotional state) impact sales interactions?
- What will be the impact of dating apps, sexbots and other smart devices on interpersonal relationships?
- How will facial recognition and wearable computer technologies meld with AI to create 'markets of one' where the messages we see, and the products and services we buy, are highly customized to each individual consumer?

Very soon, the rise of the machines will become the race of the machines. Be sure you're at the starting gate.

And while you're waiting, be sure to read this book!

Michael R. Solomon, PhD is Professor of Marketing at Saint Joseph's University in Philadelphia, USA. His latest book is *The New Chameleons: Connecting with Consumers Who Defy Categorization*.

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1

INTRODUCTION

ABSTRACT

This chapter provides an overview of the retail landscape during the pandemic, by showing facts and figures of consumers and Governments' containing measures in Europe. It further provides some guidelines and support for retailers to be more ready to react to the environmental changes, along five main areas: (1) rethinking the in-person experience, (2) enhancing digital channels for shopping, (3) investing in digital capabilities, (4) embracing agile and flexible approaches and (5) developing new retail business models. It finally concludes with a brief summary of the remaining chapters of the book.

Keywords: COVID-19 pandemic; lockdown; shopping experience; digital channels; retail business models; agile approach

1.1 RETAIL LANDSCAPE DURING THE PANDEMIC

Countries in Europe and all over the world adopted different timing and severe measures to contain the virus. Although the World Health Organization (WHO) declared the COVID-19 outbreak a public health emergency of international concern on the 30th of January 2020 (ECDC, 2020), the speed of response of countries for very different. For instance, Italy was the first country in Europe to adopt very restrictive containment measures (i.e. lockdowns and subsequent stops of all non-essential activities such as the closure of non-grocery stores, ban of social gatherings inside and outside, imposed social distance of 1mt or 2mt, etc.) immediately at the beginning of emergency in Europe (26th of March 2020), while other countries like Spain adopted the same strategy on the 29th of March and UK later (EU, 2020). Similarly, Spain closed the land borders on the 16th of March, while the United Kingdom and Italy did not; and the non-essential movement was banned (lockdown) on the 10th of March in Italy, 16th of March for Spain and 24th of March for UK (EU, 2020). However, differently from other European countries, UK put in place two further lockdowns (from the fifth of November to the second of December 2020, and from the fifth of January to the 15th of April 2021). These measures had dramatic consequences in several industries, including retailing. The impact on footfall clearly reflects these restrictions in high streets, retail parks and shopping centres. For instance, in the United Kingdom the footfall reduced by 80% since the beginning of lockdown, to not fully recover when the measures have been lifted in the countries (ONS, 2021). Although the performance of the retail sector differs in the different countries as reflection of the level of restrictions policies, the restrictions introduced are associated with lower levels of retail sales (ONS, 2021). However, consumers appreciated retailers' adoption of protective measures against the virus, showing favourable attitudes towards them and increased satisfaction during the (in-person) shopping experience (Untaru & Han, 2021).

COVID-19 largely changed retail landscape, from both retail management and consumer behaviour perspectives, by creating new challenges and opportunities (KPMG, 2020; Pantano, Pizzi, & Rogers, 2021; Pantano, Pizzi, Scarpi, & Dennis, 2020; Roggeveen & Sethuraman, 2020). A research from Statista (2020a) evaluated the cumulative impact of lost retail sales caused by the pandemic as 3,264 million British pounds (728 in Germany, 445 in France and 253 in the UK).

Some changes that had to be put in place in the short term, for instance new health and safety measures (including in-store on-way systems, hand sanitizing areas, cap to the number of accesses, etc.) reduced the demand for certain products dramatically. For instance, research in the United States, United Kingdom and Germany in 2020 showed that consumers spent less than usual on clothing due to the pandemic: 41% less, 60% less and 49% less respectively (Statista, 2020b); in opposite they spent more than usual on health and hygiene (i.e. hand sanitizer and medicine): 33% more, 36% more and 43% more respectively (Statista, 2020c). In the long-term scenario, retailers have been required to push towards online/mobile channels to compensate the forced closures due to lockdowns, and to invest in contactless technologies (including contactless payment systems) that would last also after the pandemic. However, recent studies showed that not all retailers, with emphasis on traditional small/local retailers, were able to achieve the new opportunities offered by digital channel expansions, due to the required web infrastructure and logistics (including distribution and delivery) costs, and economies of scale in place for large established online players (i.e. Amazon) (Beckers, Weekx, Beutels, & Verhetsel, 2021).

Simultaneously, the shortage of some products (including imported products) and difficulties in distribution pushed to revisit the supply chain management. As a consequence, retailers needed to design/redesign retail supply chain networks to increase the resilience, by considering different resilience strategies, such as safety stocks, inventory sharing and reserved capacity (Alikhani, Torabi, & Altay, 2021).

From a consumers' perspective, customers discovered different places for shopping (for instance, in the United States, about 17% of consumers shifted away from what was their primary store before the pandemic; Briedis, Kronschnabl, Rodriguez, & Ungerman, 2020). Consumers also displayed panic buying and stockpiling, driven by fear of contagion and anxiety. Consequently, retailers introduced some new practices to reduce consumers' irresponsible behaviours, such as reserved opening (usually in early morning) only to vulnerable people, or limiting the quantity of certain products to be bought by each consumer (i.e., toilet papers, flours, pasta, etc.). Buying online become more familiar also for those consumers previously rooted offline, and for those kinds of products traditionally bought in person before the pandemic (for instance, grocery delivery went up by 57%) (Briedis et al., 2020). For instance, in China, the number of (in-person) transactions in grocery stores declined by 30% during the pandemic, and buy online and pick up in the store grew 28% (Briedis et al., 2020). Indeed, consumers increased their purchases online, while Amazon's share price has risen from $1,900 to $3,160 (McGinn, 2020). Also, there was a surge in subscription to online platform-based services (i.e. Disney+, Netflix, Amazon prime), and an increasing familiarity with subscription plans. Consumers' increased engagement with online shopping was a consequence of the possibility to overcome geographic/physical boundaries and a welcome channel to gain access to limited resources (i.e. shortage of certain products), achieve convenience. Consumers became increasingly dependent on technology to fulfil individual needs and wants, and benefited from more time to spend at home and to use to search/find/compare products (Jiang & Stylos, 2021).

Moreover, practitioners pointed out that also consumers' expectations changed (e.g. reaching products with more quality, more convenience, more speed (of delivery), more choice, and more value), but it is unrealistic of any retailer to be able to fulfil of them (McGinn, 2020).

1.2 COMPETING IN THE "NEW NORMAL"

In 2021, some signals of recovery appeared. For instance, the online traffic of Travel industry in May 2021 increased by 11.4% compared to the same period of January 2021, while the food suppliers online decreased by the 20%, showing consumers' tendency to find a "new normal" in their consumption habits (Statista, 2020d). However, in December 2020, clothing and fuel consumption was still below the pre-pandemic level (ONS, 2021). Nevertheless, the long-term social, economic and health impact of COVID-19 is still unknown, as well as what the "new normal" will eventually be, when the pandemic is over.

In this book, we try to provide a comprehensive overview of the actual retail landscape, with some guidelines and support for retailers to become more flexible and equipped to react in a more agile manner. We suggest five main recommendations that would help retailers to thrive in the new competitive scenario:

(1) Rethinking the in-person experience.
The online shopping offers the possibility to buy directly from home, and choose among different delivery possibilities (i.e. buy online and pick up in the store, home delivery on name day or same day delivery, etc.), while providing an experience without exposing consumers to the risk of contagion (no physical interactions with others). Retailers should rethink their offer to offer a remarkable experience able to catch consumers back in the stores, and to maintain them. To this end, they should focus more on the hedonism aspects of the experience that the store can provide against the utilitarian online experience, by engaging, entertaining and stimulating customers (Scarpi, 2021). For instance, multisensory environments enriched with new technology would increase consumers' purchase decisions (Mishra, Shukla, Rana, & Dwivedi, 2021)[1].

(2) Enhancing digital channels for shopping.
At the beginning of the pandemic, many retailers had to close the store as results of Governments' containing measures. However, not all retailers were ready to move online/mobile. For instance, the fast fashion retailer Primark only in 2021 added e-commerce functionalities to the website, and announced that in early 2022 consumers will be able to check the availability of certain products on the closest Primark store directly from

1 Multisensory environments are environments able to engage simultaneously with multiple senses visual, auditory, haptic, olfactory and taste.

the website. Mark and Spenser Food (M&S Food) launched at the end of 2020 the new app to allow consumers in buying food from mobile. In early 2021, Sainsbury launched a brand new app to support consumers for in-person purchases (namely "Scan & bag as you go"): the app allows consumers to scan the barcode of each product to buy directly from the app, and complete the payment from the app before leaving the store through a dedicated SmartShop checkout. Thus, retailers from any sector need to invest on digital channels (including mobile and online ones) to complement the in-person service (and to replace it if needed due to health and safety regulations). Extending towards digital channels would allow retailers to gain competitive advantages from the integration of different sales channels and communication channels (i.e. social media), improving the offer and the shopping convenience (e.g. in terms of location and availability of products), and bridging new supply and demand side opportunities (Balaji & Roy, 2016; Haas, 2019).

(3) Investing in digital capabilities.
There is a huge deal of research on how new technologies might improve retailing from both the managerial and the consumer's perspective, with emphasis on Artificial Intelligence and machine learning algorithms, retail time inventory management, predictive analytics, personalization and co-creation functions. Thus, there is a need for new skills, embracing retail innovation and analytics (Pantano et al., 2021). Indeed, acquiring expertise in data analytics (with emphasis on big data analytics) and technology/innovation management would become more and more important to get competitive advantage (Pantano et al., 2021). For instance, proficiency in these techniques would support warehouse automation, logistics operation, supply chain optimization, consumers' traffic and goods path analytics, mobile payments, etc. (Balaji & Roy, 2016; Shankar et al., 2021).

(4) Embracing agile and flexible approaches.
COVID-19 pandemic disrupted many of strategies and practices traditional used by retailers, who had to adapt quickly to the new competitive environment. Retailers should improve their collaboration with customer to be able to respond more flexible to change. Indeed, an agile focus is based on the development of ad-hoc solutions based on the actual market and business needs through successful collaboration (Rigby, Elk, & Berez, 2020). In this way, retailers would be able to generate new value for both company and customers.

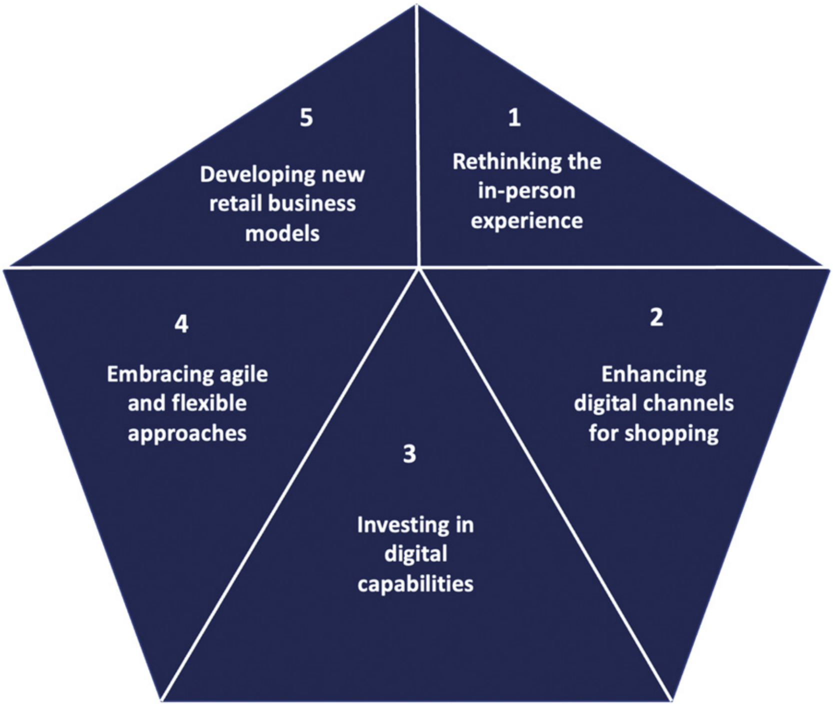
(5) Developing new retail business models.
Traditional retail business models consider the value proposition, client relations, horizontal integration, value appropriation, vertical integration and partner relations (Haas, 2019). However, these traditional models should integrate the usage of new technologies, which might beneficially impact on the business model's the diverse components. For instance, some technologies might improve the value chain in which the retailer operates (vertical integration), while others might improve the relationships with partners, such as managing retail buying groups systematically. Likewise, the trends in subscriptions plans might be taken into considerations also by retailers of physical goods, due to the characteristics of high flexibility and customization (with modular or ad-hoc bundles for consumers), without the infrastructure costs typically associated with more traditional service delivery formats. Thus, new retail business models should reflect these opportunities and the benefits emerging from the usage of new technology.

Fig. 1.1 graphically summarizes the recommendation. Each recommendation will be detailed in the next chapters of the book.

1.3 BOOK OVERVIEW

In spite of much discussion about the negative consequences of the pandemic on sales, some retailers demonstrate a remarkable ability to respond effectively and cope with the emergent marketing reality. For this reason, there is a need for a strong piece of work collecting and synthetizing the actually fragmented contributions: from shopping anxiety reducing consumers' in-person purchases, over the need of new practices to ensure safer shopping experience, to more efficient in-store crowd management, to the development of new technologies and new frameworks to support the change. The aim of this book is to shed light on technological developments and emerging paradigms to support retailers in this change, in a way that is accessible for academic researchers, practitioners and policy makers who are experiencing the need of new approaches to retail management.

This book is designed to provide an overall understanding of issues and opportunities for retailers that emerged during COVID-19 pandemic. In particular, it encourages readers to adopt future-facing, new approaches to retail management. The book proposes tools and frameworks to thrive in



Source: The authors.

Fig. 1.1. Recommendations for Retailers to Thrive in the New Competitive Scenario.

during the pandemic towards a post-pandemic scenario, synthesizing the emerging studies on the dramatic consequences of COVID19 pandemic in an accessible way. Seeking to understand how retailers should adapt their strategies, we recommend this book that proposes empirical and theoretical contributions, and case studies that contribute with new and provocative solutions.

The reminder of this book is organized in seven chapters:

Chapter 2 provides insights on irresponsible consumer behaviours and the shifts towards more sustainable choices, allowing retail managers to incorporate this new reality in further strategic decisions. Three consecutive stages in consumer behaviour changes in the pandemic crisis are discussed: from *reacting* (e.g. hoarding), over *coping* (e.g. do-it-yourself behaviours), to *longer-term adapting* (e.g. potentially transformative changes in consumption).

Chapter 3 provides a deep understanding of how the uncertainty and risk perceptions coming from emergency awareness impacts consumers' behaviour.

Attention is solicited towards new retail strategies and practices to mitigate these consequences.

Chapter 4 aims at supporting retailers in making informed decisions, by clarifying the extent to which store layouts influence (perceived) consumer density. Specifically, the chapter illustrates how new technologies and methodologies (i.e. agent-based simulation) can help in predicting a store layout's ability to reduce consumers' perceived in-store spatial density and related perceptions of human crowding, while also ensuring a certain retailers' profitability.

Chapter 5 provides an analysis of how COVID-19 has accelerated the digitalization of retailing, focusing on the shift towards the online and mobile shopping channel. On the basis of success stories and failures in retail business practice, lessons are distilled for developing effective future phygital scenarios.

Chapter 6 focuses on the technologies developed and in use before the pandemic, the ones further developed as response to the pandemic, while the final part of the chapter proposes a new technology implementation process (cycle) to support retailers in introducing new technology. In particular, the process in based on seven main activities: (1) Technology need recognition; (2) Technology screening; (3) Initial development and testing; (4) Business analysis; (5) Technology development; (6) Market acceptance testing; and (7) Technology adoption, while monitoring and learning actions should occur constantly throughout the process to evaluate the benefit of the technology at each stage (or to discard for further investment).

Chapter 7 revisits shopping centres' attributes in the light of consumers' choices of actual centres, taking into account the recent increasing role of technologies, leisure activities and changes in consumer behaviour. In doing so, we aim to improve perceptions of modernity and help to regenerate (or at least mitigate the decline of) shopping centres. Specifically, the new set of attributes include appearance (external appearance), convenience, entertainment and leisure activities, memorable experiences, green place and policy, image (modern image), price, service, size and technology.

Chapter 8 starts with projections of how the phygitalization trend in retailing will further evolve and what role data plays as a basis for a competitive advantage – on the condition of smart and ethical use. Besides looking at customers (downstream), we address the upstream in the value delivery network, focusing on how to succeed in balancing between efficiency and sustainability in the retail supply chain. Retailers face huge challenges. This chapter contributes to setting the scene for retailers to thrive in the brand-new post-pandemic aftermath.