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Adding Bricks to Clicks – Online Retail Evolution

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Adding Bricks to Clicks – Online Retail Evolution

The integration of an offline channel creates various (non-)monetary benefits for former pure online retailers. Nevertheless, this strategic development is an ongoing learning process for retailers and involves a fundamental corporate culture change. It therefore needs to be pursued cautiously, given the challenges that will arise.

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Retailing experiences constant disruption (Rigby 2011; Grewal et al. 2017). While the future of retailing seemed focused on e-commerce a few years ago, the tables now appear to be turning (PricewaterhouseCoopers 2015; Walsh 2016). E-commerce is still growing, but at a slower pace. In 2013, Germany's e-commerce grew by 12%, but predictions for the coming years are merely single figure growth rates (KPMG 2017). Also, shoppers frequently use the online channel to search for information and for product comparisons, but make their actual purchases offline (Verhoef et al. 2007; Pauwels et al. 2011; Bodur et al. 2015). The offline channel is thus regaining its importance, which is also reflected in the increasing investments in the extension, development, and renewal of physical stores (KPMG 2017).

Pure online retailers opening physical channel(s) in addition to their existing online channel (Evans and Schmalensee 2016; KPMG 2012) have become a growing phenomenon. In various industries, 'Adding Bricks to Clicks' (ABtC) retailers (Avery et al. 2012) such as Zalando, Amorelie, and mymuesli have emerged. Amazon is among the most recent online retailers to go offline with its own bookstores (Micha and Koppers 2016) and supermarkets.

Prior research on ABtC retailers has primarily investigated the impact of channel integration, which boosts sales and monetary cross-channel synergies (see, e.g., Cao and Li 2015; Herhausen et al. 2015; Pauwels and Neslin 2015; Fornari et al. 2016). Consequently, the financial performance of retailers with more than one channel is better than that of single-channel retailers (Bruce et al. 2014).

However, pure online retailers considering offline channel integration need a greater spectrum of information for

their planning than mere sales development. While Rittinger et al. (2017) discuss the objectives of, and factors for, successful offline channel integration, their statements are not based on primary data derived from a scientific exploratory study. In addition, challenges arising from offline channel integration are still rather unknown.

Thus, the aim of the present study is to examine former pure online retailers' experiences with their transformation into ABtC retailers. It provides empirical insights into the non-monetary benefits and challenges of offline channel integration. Hence, this qualitative study extends our prior knowledge by contributing a hitherto neglected perspective on ABtC. It also permits a differentiated view on prior academic research by adding insights from practitioners of diverse industries. These are of particular importance as to date no best practice example of offline channel integration can be referred to.

Methodology of the Study

In 19 semi-structured expert interviews conducted during the winter months of 2017 and 2018, managers at ABtC retailers shared their insights. The selected retailers vary in turnover size and operate in different industries, thus allowing a comparison of different perspectives on offline channel integration. The managers (hereafter referred to as experts) were selected for their special and deep knowledge of offline channel integration gained through their professional experience. Table 1 provides more information on the experts and their qualifications.

Each interview comprised three major sections: a warm-up section, during which the experts introduced the retailer and their job function; the main section, which focused on the opportunities and challenges arising from offline channel

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Remark

The data used in this article were initially gathered for the master theses of Clarissa Zigan (2017) and Stefanie Blob (2018).

Table 1: Overview of Interviewed Experts

Expert Number	Industry	Founding (Year)	Launch of First Offline Channel (Year)	Turnover Classification ¹	Job Function of Expert
1	Art	2003	2004	medium	CMO
2	Auto parts	2001	2006	large	CEO
3	Consulting agency	2017	n.a.	n.s.	Founder & Managing Director
4	Electronics	2001	2015	large	Head of Business Development
5	Fashion	2008	2012	large	Strategy Manager
6	Fashion	2002	2006	large	Senior PR-Manager and Project Manager Multichannel
7	Fashion	2012	2014	medium	Founder & Managing Director
8	Fashion	2014	2017	medium	Co-Founder and CFO
9	Fashion	2016	2016	n.s.	Founder
10	Food	2007	2008	large	Senior Head of Brand & Product
11	Leisure and tourism	2003	2015	medium	Director Trade & Corporate Sales
12	Optometry	2007	2016	large	Vice President Multichannel
13	Optometry	2013	2014	small	Senior Business Development Manager
14	Retail (holding group)	1949	n.a.	large	Project Manager Multichannel Retail Store Excellence
15	Stationary and interior decoration	2014	2016	n.s.	Founder
16	Sporting goods	2007	2011	large	Head of Retail Operations
17	Sporting goods	2007	2014	medium	Managing Director
18	Travel	2012	2017	large	Manager Communications
19	Travel	2011	2014	large	Head of Marketing & Sales DACH

¹According to EU norms: <10 million € = small, 10 -50 million € = medium, >50 million € = large
n.a. = not applicable; n.s. = not specified. Source: Roggentin/Waldau.

integration; and a closing section to gain insights into the experts' concluding thoughts on the ABtC model and an outlook on the retailer's future activities. On average, the interviews lasted 25 minutes. They were recorded and their transcripts analyzed using Mayring's qualitative content analysis (Mayring 2014). This systematic analysis of the transcripts served to extract relevant information and to identify categories of similar meaning and reoccurring themes.

The presentation of the interview results below is organized according to the key opportunities and challenges arising from offline channel integration (see figure 1). References to relevant literature as well as to the interviewed experts via the expert number (see tab-

le 1) can be found in brackets behind key statements.

Key Opportunities of Offline Channel Integration

Shoppers increasingly wish to combine their visits to online and offline channels into a seamless, single shopping process (Rigby 2011). The highly competitive online and offline market environments and the increasing profit potential of the offline channel (KPMG 2012) require pure online retailers to reevaluate their distribution strategy in order to maintain their market position. The omnichannel approach to retailing, which entails the integration of online and offline channels, may thus be a crucial factor for securing long-term profitability.

Creation of a Distinct Shopping Experience

Despite technological advances, distinct shopping experiences remain important for shoppers (4; 5). Digital channels cannot provide a haptic or even multisensory shopping experience. This factor is especially important for assessing specific product categories (Browne et al. 2004) such as automobiles, clothing, and electronic devices (4; 6; 13).

Through their physical stores, online retailers can offer their customers the opportunity to experience and evaluate products with many of their senses (15), and to directly experience their material, quality, and aesthetic appearance (5; 13). Allowing a haptic

Management Summary

With shoppers increasingly demanding seamless cross-channel experiences, the single channel retailer concept is deemed dead. Although former pure online retailers regard offline channel integration as financially promising, empirical insights into the non-monetary opportunities and the challenges arising from such an integration are still rare. This explorative study based on expert interviews with 19 former pure online retailers allows conclusions to be drawn regarding this promising strategic decision. The implementation challenges, however, should not be underestimated.

experience (4), using scents in-store (18) or offering product tastings (14) can optimize a shopping experience and drive sales (14; 15). Since creating a multisensory shopping experience also supports customer acquisition and cross-channel retention (18), this is online retailers' major objective when integrating an offline channel (13; 14).

Accommodation of Multichannel Shopping Behavior

Pure online retailers lose sales as shoppers often turn to the offline channel (4; 19) for their actual purchasing process. Many shoppers refer to online channels primarily for their pre-purchase inspirational (8; 11) or informative research, occasionally also for routine reorders (8; 9; 11). Shoppers' individual situation also affects their choice of channels. For instance, shoppers with a strong need for convenience are more likely to do their research and purchases online, due to this channel's potential time and effort savings. However, if shoppers need personal advice or are uncertain about a product, they prefer physical stores (13). In order to accommodate this multichannel shopping behavior and to avoid losing shoppers to their com-

petitors, retailers are required to offer a portfolio of channels rather than a single channel (3; 5; 6; 11; 14). Ideally, retailers should go a step further and integrate their channels (omnichannel retailing; see Verhoef et al. 2015), thus allowing shoppers to switch seamlessly between a single retailer's channels (13; 19).

Diversification of the Service Offering

Pure online retailers cannot offer all the services that customers seek for their convenience.

The integration of online and offline channels allows retailers to offer additional services, such as pick-up stations for online orders, offline return options, and personal consultation appointments (4; 18). Furthermore, many retailers use innovative technologies as an additional in-store service offer: for example, the lingerie company Lascana allows its customers to choose different lighting moods in the changing rooms, while the travel agency Urlaubsguru offers virtual reality headsets so that customers can explore their holiday destination in a virtual setting (see figure 2). Online retailers should therefore integrate the offline

Figure 1: Key Points Raised by Interviewed Experts



Source: Roggentin/Waldau.

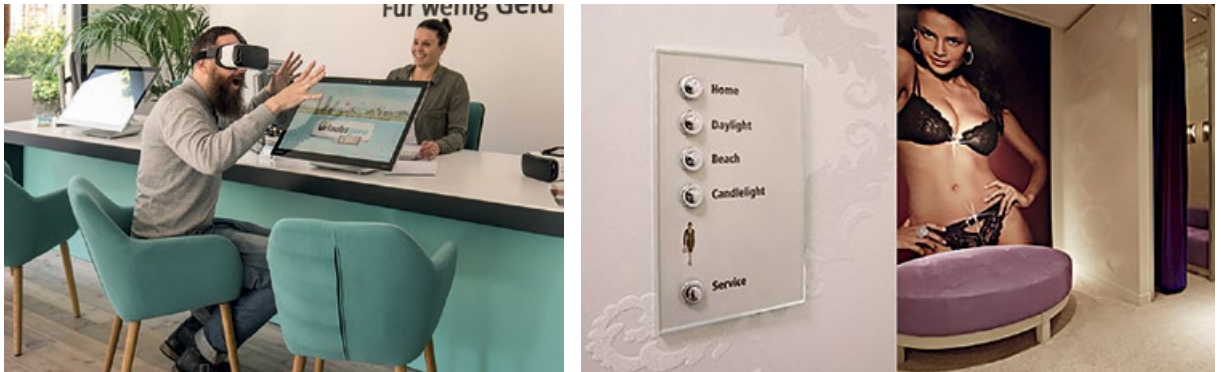


Image 1 Applications of Innovative Technologies in Offline Stores
Sources: Urlaubsguru 2018; Lascana Blog 2010.

channel in such a way that its limitations, such as the limited product range and opening hours, will go unnoticed and synergies between both channels' unique strengths are created (4; 13; 18).

Increased Brand Visibility and Simplified Brand Building

Customers often perceive new or unknown retailers, as well as those that do not yet have strong ties with their customers (11), as interchangeable (8). In contrast, retailers with offline channels have a higher chance of creating memorable brand experiences and delivering their unique brand essence more convincingly (8; 13; 19). For example, customers can experience the mymuesli brand and try the products in mymuesli cafés (see figure 3). This allows the company to improve the quantitative and qualitative dimension of their customers' brand experience, which can improve their brand image.

Increase in Customer Acquisition and Enhancement of Customer Relationships

Online retailers miss out on certain customer target groups, such as those

with an online channel aversion or a lack of experience with an online channel. By integrating an offline channel, retailers can acquire new customers and, in addition, establish or strengthen their credibility by direct face-to-face interaction with their customers (8; 15). This enhances the emotional relationship between customers and retailers (3). Good relationship management can also be a unique selling proposition (18). A more personal interaction between the buyer and the seller allows the latter to gain valuable customer insights, resulting in better services, more loyal customers, fewer shoppers switching to competitors, and, ultimately, higher sales (3; 4; 6).

Economic Gain

Owing to the stiff competition that players such as Amazon currently engender, being a successful online retailer in increasingly saturated markets has become very challenging and expensive (McKinsey 2016; Rae 2016; Hyken 2017). Consequently, integrating an offline channel can – despite the required financial investments – be a profitable long-term strategic decision (3).

In line with prior research (e.g. Herhausen et al. 2015; Pauwels and Neslin 2015), most experts mentioned that physical stores have a significantly positive impact on retailers' performance and overall revenues (6; 7; 8; 14; 17). However, the extent of the economic gain engendered by offline channel integration strongly depends on factors such as company size, current online revenue, and the physical store's turnover. For instance, for retailers with a strong online heritage, the revenues from their physical channel are rather small compared to those from their online channel (14).

Verhoef et al. (2007) caution that integrating channels into the existing distribution system might generate negative spillover effects between the channels or might have no monetary benefits at all. However, the interviewed experts have found that the synergy effects outperform the cannibalization effects between channels. Online sales will increase, especially in the environment close to the store locations, while cross- and up-selling effects also occur (3; 4; 18).

All our experts evaluated the ABtC approach as profitable and defined it as an essential investment in a business's



Image 2 mymuesli Café in Munich
Source: Mymuesli 2019.

future in order to create a competitive advantage. However, offline store integration is a two-sided coin. The experts interviewed for this study stress that there are potential pitfalls when entering an unknown offline territory; channel integration thus needs to be undertaken cautiously.

Key Challenges of Offline Store Integration

Pure online retailers know their customers and know how to sell products to them online, but they lack knowledge of, and expertise in, offline retailing. Since setting up physical stores is a labor- and cost-intensive process requiring major changes within a company, retailers need to be aware of the challenges – as outlined in the following.

Adjustment of Organizational Structures

Integrating physical stores will not only affect how a company sells its products, but also how it operates, works, and organizes its processes. Rigby (2011) points out that collaboration between online and offline retail business units is the key to success, as

the free flow of ideas and information will inspire the employees and enable omnichannel innovation. Consequently, the corporate culture needs to be adapted to be less traditional and more agile (9; 12) with, for instance, more interactive processes (5) and employees working from worldwide locations (18).

Managing the employees is another major challenge, especially recruiting

and training them in order to create one team with one vision across all channels (6; 8; 9; 15; 17). Fundamentally, employees need to be willing to change along with the company and be open to new tasks (9; 14).

Acquisition of Offline Competences

Owing to their lack of competences with regard to operating offline channels, online retailers face problems when developing concepts for their physical stores (3; 6; 9; 14). The lack of relevant experience becomes especially evident when retailers transfer their online shop concept to a physical store. Retailers need to approach their offline shoppers differently if they wish to evoke positive emotions (3). In the digital world, retailers can offer an unlimited assortment of goods and display these on the basis of the customers' past purchases or their current browsing behavior. Physical stores have limited capacity, and the assortment offered needs to be tailored to a larger, more general customer group (5; 17).

Moreover, retailers need to re-organize their logistics systems due to, for instance, the challenges arising

Main Propositions

1. Offline channel integration is indispensable to ensure a former pure online retailer's growth.
2. The cross-channel management of human resources and customer data presents retailers with as yet unresolved challenges.
3. The concept of omnichannel retailing is an ongoing learning process for retailers, as there are not yet any best practice examples.

with regard to their product assortment and stock inventory, or when organizing exchange and return processes (4; 8).

Additional Financial Investments

Besides the additional costs of changing a retailer's infrastructure, more financial investments are required to establish the ABtC business mode, due to the increased complexity of offline operations and supply chain systems (8; 19). For example, internal costs will arise due to the need for employee training and special in-store services (17), while external costs will occur due to commissions for partners and rental fees (19). Although many ABtC retailers have increased their overall revenues, it is far more challenging to reach profitability (13; 17). Thus, while a successful offline channel integration appears promising, it needs to be implemented with care, as it involves complex restructuring and cost-intensive investments.

Seamless Channel Integration

It is crucial that retailers harmonize all channels regarding their communication, products, prices, and operations (17). The degree of channel harmonization determines the perceived quality of a shopping experience (1). However, to date none of the interviewed retailers have achieved full channel integration, although shoppers should be able to use multiple channels simultaneously without any performance differences across the channels or interruptions within a single transaction (4; 13; 14; 17).

Most of the interviewed retailers currently pursue an asymmetrical channel integration; i.e., offering complementary, not identical, services

in the different channels (8). The integration of all the channels remains complex (3). In order to address this challenge, retailers will need suitable data systems to aggregate and to analyze their customer data across channels (13; 17). Online retailers therefore face the issue of how to design and integrate their channels to create synergies and to analyze cross-channel customer data.

Management of Cross-channel Data

While the interviewed experts recognize the importance of collecting and analyzing cross-channel customer data, the practical implementation remains a major challenge. Retailers need to collect data across all the channels to gain a holistic understanding of their (potential) customers and their individual journeys (4; 5). Data collection in physical stores is still challenging, particularly when selling through intermediaries (6; 8; 14). So far, there are no uniform legal regulations concerning data management, which may present

problems when operating internationally (3). Thus, tracking, synchronizing, and analyzing shopping behavior across channels remains challenging (13). A technological infrastructure to enable this cross-channel analysis is essential for obtaining a comprehensive understanding of the entire customer journey (5; 6).

Conclusion

The integration of online and offline channels – if undertaken cautiously and with foresight – creates various opportunities for shoppers and, consequently, for retailers as well. An offline channel integration offers shoppers an additional touchpoint (6) and, therefore, higher levels of convenience and interaction with retailers (4; 8). Owing to the complementary benefits of online and offline channels, this allows a broader spectrum of customer needs to be met, which could lead to a larger customer target group (17; 19). Since shoppers spontaneously choose the channel that provides the best value for their purchase (9), this reduces


Lessons Learned

1. In order to remain competitive, offering multiple, yet separate channels is insufficient, as shoppers expect consistency across channels and the flexibility to use them interchangeably.
2. Retailers should adapt their organizational structures and corporate culture in order to operate inter-divisionally and to create synergies across channels.
3. In order to prevent wrong strategic decisions with follow-up costs, former pure online retailers need to build awareness of the areas in which they lack competence and experience.
4. Former pure online retailers need to integrate their online and offline data streams in order to analyze their customers' journeys across channels and to benefit from such cross-channel customer data.

the probability that they will switch to competitors (3; 6). Besides the resulting overall increase in sales, omnichannel retailers can benefit from distributing the possible risks across several channels (17).

Former pure online retailers will soon discover that channel adoption and integration are difficult endeavors when they begin operating in a field requiring different skills and compe-

tences than those they already possess (6; 9; 14). Entry into brick-and-mortar retailing not only entails extensive deployment of human and financial resources, but also requires retailers to adjust their internal processes and corporate culture. The retailers' processes will become more complex, which will in turn confront their employees with new demands. Retailers should therefore decide whether the integrati-

on of an offline channel is suitable for their company and, if so, how they may approach this endeavor. Since there is as yet no perfect omnichannel model, retailers cannot refer to a benchmark (5). The integration of online and offline channels requires a strategic and holistic approach to allow retailers to benefit from the opportunities and to handle the arising challenges comprehensively. 

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