

Supply Chain Management for Efficient Consumer Response Conference

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Valahia University of Targoviste, Romania

SCM 4 ECR

Customer/Shopper Experience Management (CEM) Case studies in Retail Industry

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Agenda:

- 1. Experience Economy. Customer Experience**
- 2. Shopping Experience**
- 3. Shopper Marketing**
- 4. Brighter Shopping Experience**
- 5. Business Model of the Future**
- 6. Case study – Retail customer experience**

1. Experience Economy. Customer Experience

Customer Experience

The customer experience originates from a set of interactions between a customer and a product, a company, or part of its organization, which provoke a reaction.

This experience is strictly personal and implies the customer's involvement at different levels (*rational, emotional, sensorial, physical, and spiritual*).

A second and related definition is that “Customer Experience is the internal and subjective response customers have to any direct or indirect contact with a company.

Customer Experience

The customer experience encompasses the total experience, including the search, purchase, consumption, and after-sale phases of the experience, and may involve multiple retail channels.

Major Factors Influencing Consumer Buying Decision Process

| Macro Factors | Need Recognition | Information search | Evaluation | Purchase | Post purchase |
|-------------------------|------------------|--------------------|------------|----------|---------------|
| Brand | • | • | • | • | |
| Price | • | • | • | • | |
| Promotion | | | • | | |
| Supply Chain Management | | | | | |
| Location | | • | • | • | |
| Advertising | | | | | |
| Packaging & labeling | | • | • | • | • |
| Service | | • | • | • | |
| Mix | • | | | | |
| Atmosphere | • | • | • | • | |
| | | | • | • | • |

The Brand Experience

The customer comes to a retailing environment with perceptions about two types of brands:

- *the retail brand* (e.g., Starbucks, Wal-Mart);
- *the manufacturer or service brand* that is sold in the retail stores (e.g., Ralph Lauren, Tide, Dell).

The Price Experience

A lot rides on how a retailer sets its prices. The three other P's create value for the seller; the fourth P of price captures *value*.

This is the only P that earns revenue for the retailer.

When retailers price a product or service too high, consumers view it as a poor value and will not buy.

The Promotion Experience

Consumer promotions also take several forms, including price promotions, loss leaders, and in-store displays.

The Supply Chain Management Experience

Most of the researchers centers on what happens at the front-end of the retail store, supply chain management occurs at the back end.

For decades, retail supply chain and logistics issues seemed somehow less important than other activities such as promotion, pricing, or customer service.

The Location Experience

Retailing academics and practitioners seem always to emphasize “location, location, location” as the key to success.

An important research advance could consider the role of travel time on consumers’ choices of retail formats and the related retailing implications because consumers value their time, researchers should investigate what it might take, in terms of price savings and deals, to attract consumers to a factory outlet store (normally located some distance away) rather than a similar store in a conveniently located mall.

The Advertising Experience

Exponential growth in Internet hosts and personal computer adoption has led to dramatic increases in online activity.

During the growth process, marketers recognized that the Internet was a medium for reaching millions of potential customers. Since then, marketers have adapted value based advertising strategies to the Internet.

The Packaging & Labeling Experience

Packaging plays a major role when products are purchased.

After all, it is the first thing seen before making purchase choices and it is widely regarded that over 50 per cent of purchasing decisions are made at the shelf, or point of purchase.

Therefore, packaging which creates differentiation and identity in the relatively homogenous consumer packaged goods industry is therefore highly important.

The Service Mix Experience

Customer service is the ability of an organization to constantly and consistently give the customer what they want and need.

The Atmosphere Experience

Consumer spending behavior can be significantly influenced by the store atmosphere and the customer mood.

Customers require a store layout that maximizes the number of products seen within the context of a customers' need for the product.

2. Shopping Experience

We designed the questionnaire taking in consideration three approaches:

- The approach of **Fred Crawford and Ryan Mathews** in the book “**The Myth of Excellence**” (2001). They are proposing as primary and secondary attributes of companies and brands the following: price, device, product, experience, access. We are considering them as axes, as first level criteria in creating a consumer-relevant company, also used by us in the paper “Consumer and Shopper Satisfaction. Measurement of Collaborative Supply Value Chain” (Supply Chain Management for Efficient Consumer Response Conference, 2011)

- The approach of **Kamaladevi** in the paper “**Experience Management in Retailing**” where the author considers as major factors influencing consumer buying decision process the following: brand, price, promotion, supply chain management (the relationship with the suppliers of suppliers), location , advertising, packaging and labeling, services, atmosphere;

- The study from School of Management, **Cranfield University**, “**What Makes a Great Customer Experience**” by **Fred Lemke**, Hugh Wilson and Moira Clark,

Shopping Experience

A. Customer factors:

- Social factors*, e.g., shopping with family and friends;
- Task factor*, e.g., searching for a Christmas tree in autumn;
- Time factor*, e.g., having enough time to shop;
- Product involvement*, e.g., whether a customer for computers is interested in technical features;
- Financial resources*, e.g., having enough money to spend.

Shopping Experience

B. Retailer factors:

- *Retail prices;*
- *Selection, e.g., store offers a unique selection of items;*
- *Store environment, e.g., animals and exotic plants in a store;*
- *Salespeople, e.g., friendly, silly.*

Shopping Experience

C. **Six factors** – influence the experience of customers in large retailing stores:

- Multi-store shopping* - shopping in different stores instead of buying all items in one particular store;
- Bigness and confusion* - big companies, extensive product choice, and overwhelming product assortment are seen as confusing by some customers;
- Personal interaction and personalised service* - large stores are seen as impersonal, cold, lacking of personal interaction by some customers;
- Customer recognition by staff*;
- Prevalence of mistakes and price discrepancies*;
- Unused checkout lanes* have a negative impact on the experience.

Shopping Experience

D. Interpersonal Factors – Salesperson:

- *Interpersonal effort* (helpful vs. unhelpful);
- *Interpersonal engagement* (friendly vs. unfriendly);
- *Problem resolution* (willing to go outside of rules vs. would not go outside of rules);
- *Interpersonal distance* (not too pushy vs. very pushy);
- *Time commitment* (took time vs. took no time);
- *Lack of skills and knowledge*;
- *Dishonesty*.

Shopping Experience

E. **Non-interpersonal factors** – Product:

- *Unanticipated acquisition* (found exactly the right product);
- *Lack of expected acquisition* (could not find the product);
- *Unanticipated value* (price / bargain);
- *Lack of expected value* (price too high);
- *Lack of technical quality* (product did not perform to expectations);
- *Bad atmosphere.*

Shopping Experience

Customers have options about how to deal with a company.

F. Factors:

- Product quality;
- Service quality;
- Product freshness;
- Time savings;
- Behavioural intentions.

Shopping Experience

G. Crucial issues in **achieving a great customer experience**:

- Personalisation* - the company knows the name of the customer and the historical background of the relationship irrespective of channel;
- Customisation* - the company is able to offer a tailor-made solution to the customer's problem;
- Consistency* - the experience is consistent over time, regardless of the channel used;
- Channel choice* - the customer has either the option to select the appropriate channel or is steered towards a particular channel.

3. Shopper Marketing

Shopper marketing

The Shopper Solution Value Equation



Shopper Marketing

Six Steps to Enhanced Store Shopping

1. Distribute Enriched Information via Next-Generation Digital Signage.

Present shoppers with an attractive alternative to their own mobile devices with digital signage offering deep product information, ratings and reviews, and alternate colors/models of merchandise.

2. Use Technology that Invites Customer Interaction.

Gamification solutions and gesture-based technology offer shoppers unique experiences that can only be found in the store channel.

3. Match Your Store Labor Force to Demand and Customer Needs.

Use multiple data points to determine not only how many employees should be working but what the optimal combination of job types and skill sets is for any given shift.

4. Build Store Traffic by Providing Cross-Channel Functionality.

Buy online/pick up in store and cross-channel returns are basic but effective tools for building store traffic, increasing incremental sales and improving customer service.

5. Make Omni-Channel Inventory Easily Accessible in Stores.

Store shoppers seek immediate gratification, so retailers need to invest in inventory and order management solutions that handle the disappointment out-of-stocks create.

6. Make Relevant, Real-Time Data Available to Store Associates.

Tablets and other smart mobile devices are becoming optimal vehicles for delivering endless aisle, sales support and clienteling solutions to store employees.

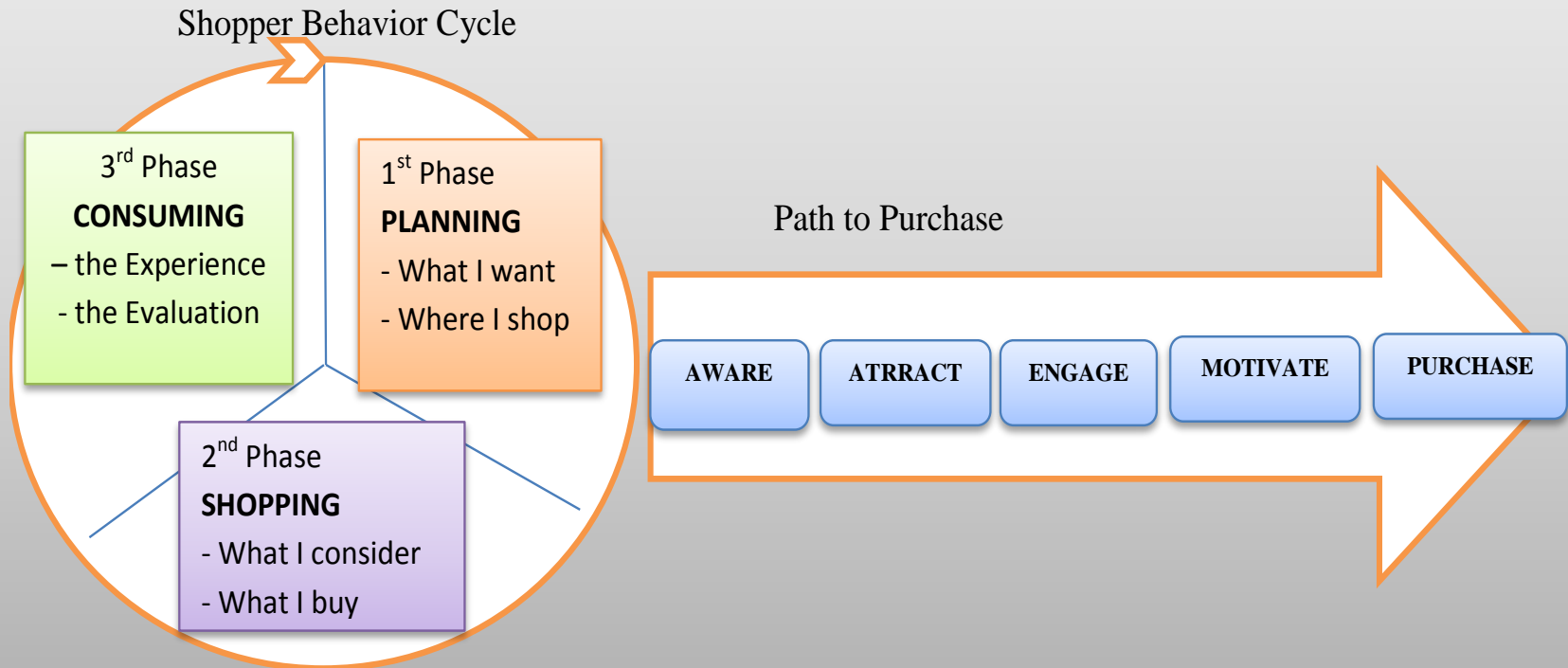
Shopper Marketing

The concept of collaboration was institutionalized in the mid-1990's with the "Efficient Consumer Response" (ECR) movement, which sought to establish consumer understanding as the foundation for improved demand management and supply chain efficiency.

But while ECR's mission has always been to improve consumer value and choice at the store level, its attention to reduced costs and streamlined processes has had a debatable impact on marketing and merchandising innovation.

Shopper Marketing

Shopper Behavior Influence Road Map



Shopper Marketing

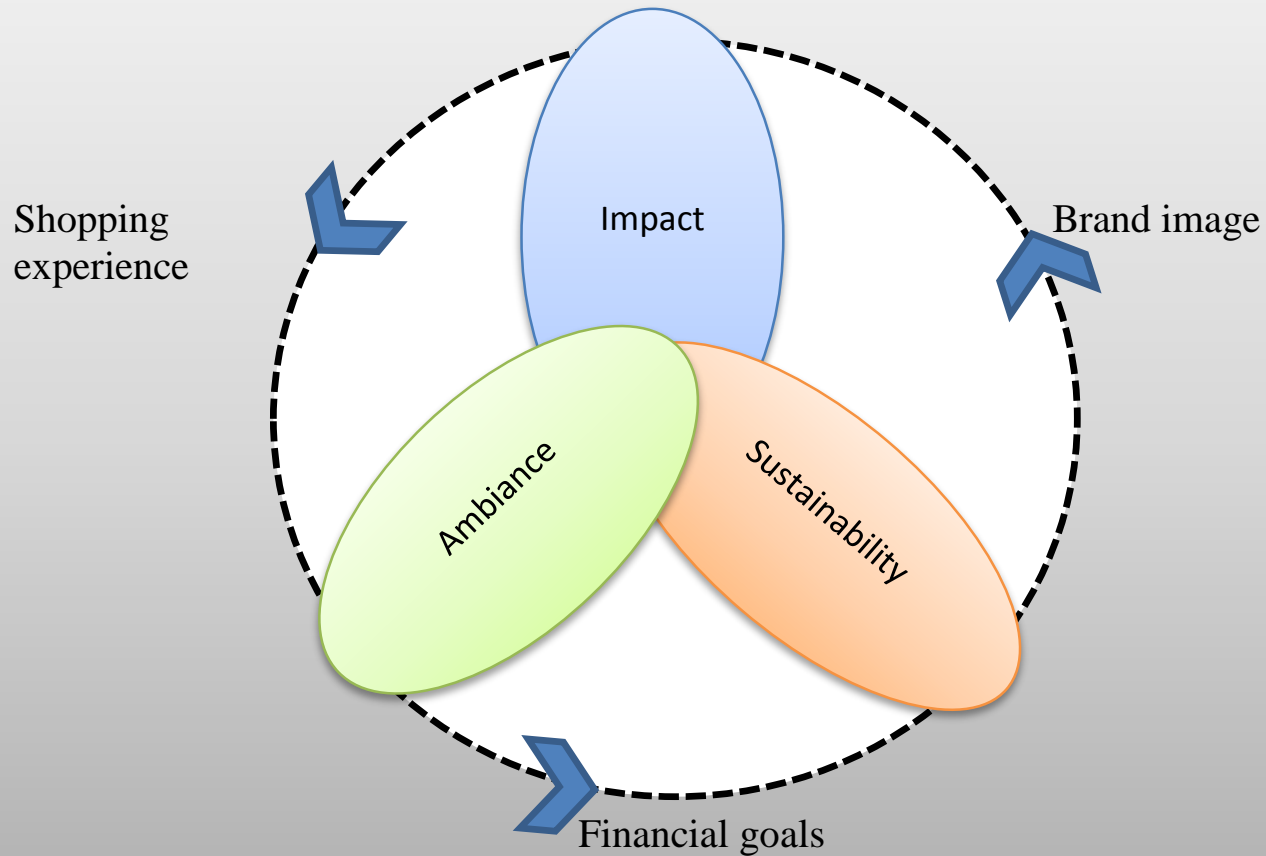
The Shopper Marketing refers to the stimuli encountered and perceptions created in bricks-and-mortar stores, as well as retail websites and other e-commerce formats. But it goes well beyond such transactional occasions to encompass all activity along the path to purchase designed to influence brand awareness and preference, store selection, consideration, in-store experience and, ultimately, post-purchase evaluation (see chart above).

4. Brighter Shopping Experience

Customer's enthusiasm

The customer's enthusiasm can be defined as the level of customer's implication for an enterprise which, first of all, satisfies the needs expressed by the clients/shoppers and establishes a long term relationship and surprises its clients/shoppers by anticipating their needs and wishes. Customers/shoppers themselves develop a very strong emotional connection with the offer of the enterprise, which becomes a part of their lives.

Brighten the shopping experience



Brighten the shopping experience

1. A formula that drives value

To be a leader in today's competitive marketplace, retailers need to focus on the importance of impact, ambiance and sustainability.

Lighting can support these three key factors to help address the critical issues of the shopping experience, the brand and meeting your financial goals, helping you transform your property in meaningful and innovative ways.

2. Enjoyable and memorable Enhancing the shopping experience

Give shoppers an experience they'll never forget. Great lighting can create an inspiring atmosphere and a meaningful experience that goes beyond shopping.

3. A distinctive and inviting image

Whether your retail personality is charming, sophisticated, no-nonsense or high glamour, store design should support your strategy—and bring your brand to life.

Shoppers have more choices today, so attracting those customers is more competitive than ever before.

Impact: For shoppers, the quality of a store's atmosphere speaks to the quality of the retailer. A store with unique, powerful contrast between merchandise displays and general circulation areas is dynamic and memorable.

4. Meeting your financial goals

It's not hard to make a bottom-line case for better lighting. Retailers can maintain and even enhance lighting levels while cutting overhead and operating costs thanks to better lighting systems. Simplification, along with energy-efficient, long-lasting lighting solutions, can mean savings.

Because retail outlets operate seven days a week, even small gains in efficiency can lead to big cost reductions. Replacing outdated lighting systems with more efficient, environmentally-friendly solutions will reduce energy consumption and maintenance requirements.

Using fewer lamp types and standardized wattages can reduce complexity and make maintenance more manageable, too. It all adds up to big savings, and improved bottom lines.

Hedonic Shopping Motivation

Hedonic shopping motives are based on the quality of the shopping experience itself rather than on information gathering or purchasing products. Consumers' shopping motives: product oriented, experiential and a combination of product and experiential.

The product oriented shopping motive refers to a store visit motivated by the desire to acquire product information or to purchase a product.

The experiential-oriented shopping motive refers to a store visit motivated by the pleasure inherent in a store visit, in and of itself.

Hedonic shopping motives are based on the quality of the shopping experience itself, rather than on information gathering of purchasing products.

The main reason many people visit shopping malls is for the *excitement of the experience*. These motives indicate the importance of *entertainment* in shopping.

Hedonic Shopping Motivation

Experience economy refers to a next economy following the agrarian economy, the industrial economy and the most recent service economy.

A transition must be made to providing customers with memorable experiences in order to achieve competitive advantage.

Experiential marketing refers to a live event of experience that gives the target market the opportunity to see a product and experience it for themselves .

Entertainment in Retailing

Its purpose is to provide a variety of paths to experience entertainment in a shopping center so that it makes consumers' experiences enjoyable rather than simply purchasing products.

The goal is to make shopping fun and interesting in order to seduce more consumers into shopping centers.

In the situation where retailers viciously compete, due to the limited time and consumption abilities, its purpose is to pursue differentiation with new distribution businesses through the factor of entertainment.

5. Business Model of the Future

BUSINESS MODELS OF THE FUTURE

Customization and personalisation

Customisation means developing a product or service tailored to individuals' needs and preferences. Examples of customisation could be you buying a car with yellow wheels, pink doors, green roof and purple interiors (why would anyone have such horrible taste in colours?). Nike is a good example of a company which sells customised shoes.

BUSINESS MODELS OF THE FUTURE

Customization and personalisation

Personalisation is where you take an existing product and help the customer adapt it to their taste by changing some features or characteristics.

BUSINESS MODELS OF THE FUTURE

Customization and personalisation

Future value creation will reside in how companies allow customers to customise or personalise the products and services for their consumption.

BUSINESS MODELS OF THE FUTURE

Co-creation

Co-creation is a business strategy that works more like a business forum and is born out of enterprise social software. It involves the coming together of different elements of the value chain to mutually benefit each segment- right from idea generation, resource allocation, revenue generation, implementation and delivery of the product or service. This mutually creates new types of capabilities, interaction and learning experiences and creates an open space for innovation, research and development, production planning and even customer feedback and satisfaction.

BUSINESS MODELS OF THE FUTURE

Collaborative buying

However, what is new in this decade is the innovative ways of deploying the collaborative buying strategy – leveraging in the Internet, mobile phone technology and, of course, social media.

BUSINESS MODELS OF THE FUTURE

Sharing – what is yours is mine

Sharing is a business model which is really taking off, driven largely by Generations Y and Z who prefer to share than own and believe that humans need to be social. Rightly so! Why buy a car when I only drive it less than 5% of the time on average in a day?

CONVERGENCE OF PRODUCTS, TECHNOLOGIES AND INDUSTRIES

Connectivity (**networks**) and convergence, today, are two technically inclined but very distinct Mega Trends that cannot be more intertwined with each other. Connectivity is one Mega Trend that has perhaps had one of the steepest evolutionary curves this decade as well as, perhaps, the one Mega Trend that is taken the most for granted.

CONVERGENCE OF PRODUCTS, TECHNOLOGIES AND INDUSTRIES

Convergence is defined as the integration of current products, technologies and industries that will lead to the emergence of new, innovative and unique products, technologies and industries in the future.

CONVERGENCE OF PRODUCTS, TECHNOLOGIES AND INDUSTRIES

1. Convergence of products (*e.g. computer + phone = smartphone*)
2. Convergence of technologies (*e.g. building technologies + automation = intelligent home automation*)
3. Convergence of industries (*e.g. space + energy = space-based solar power*)

NEW PRODUCT AVATARS : MAKE WAY FOR 'PHONCIERGE' AND 'I'M WATCH'

- The mobile phone, today, has transformed itself from its archaic functionality of making mere calls to assuming the digital responsibilities of a wallet, a ticket, a map, an organiser, a browser and, at times, even a trip advisor or an on-demand entertainer. In the future, we will see all of these functions being integrated-empowering the phone to act as a concierge, a secretary, a banker, a grocer and even, perhaps, an accountant who assists our daily routines by making 'independent' yet accurate decisions such as personalising text messages, answering and screening calls, making grocery orders and even ordering flowers for our friends on their birthdays on our behalf. This new phone avatar would be pre-programmed and attuned to the user's preferences, contacts, food habits and favourite geo-locations and would respond and react intelligently without the need of or with minimal human intervention.

FUTURE CONNECTED HOME : INTELLIGENTLY CONNECTED DEVICES

- In 2025, Internet nodes will be integrated into everything – paper, food items, microwaves, furniture, security systems – allowing machines not only to intelligently communicate and work independently, but also enable remote monitoring from the phone, car, office PC or any other mobile device.

COLLABORATIVE AND CONNECTED WORKPLACE WITH EACH EMPLOYEE A CEO

- Digital and physical media not only impacts our leisure time but also impacts our culture – meetings, sales, service, the works.

IMPLICATIONS FOR NEW BUSINESS MODELS : IT'S ALL ABOUT CONVERGE

- Connectivity has, perhaps, made the most impact on new business models. These business models are inherently born out of converging gizmos, applications and even from the converging of industries. We have digital strategies today that are wholly designed based on connected devices.

Mcommerce : The black gold of the digital era

- With the advent of mobile phone technology, companies are increasingly getting cognizant that it could be sole means of getting through a consumer in the future.

- Tesco, a grocery retailer from UK who opened shop in South Korea, has figured out a cool new way of tapping into the waiting time of tech-savvy commuters in the subway stations of Seoul, South Korea to improve their bottom line. It installed virtual stores – which are nothing but illuminated LED screens of their groceries – with QR codes. Commuters can scan the products they wish to purchase with their smartphones and Tesco will deliver it to their homes.

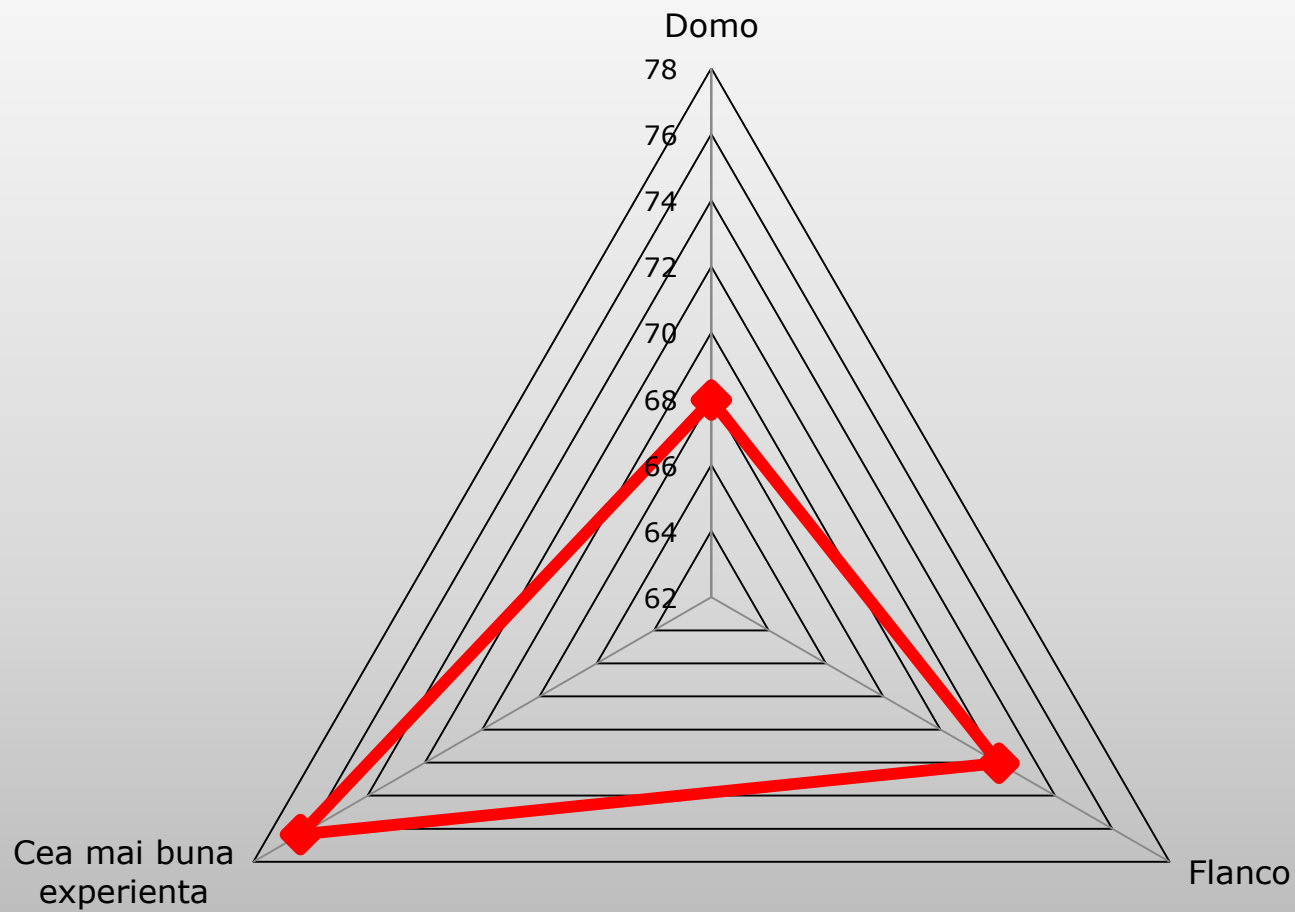
6. Case study – Retail customer experience

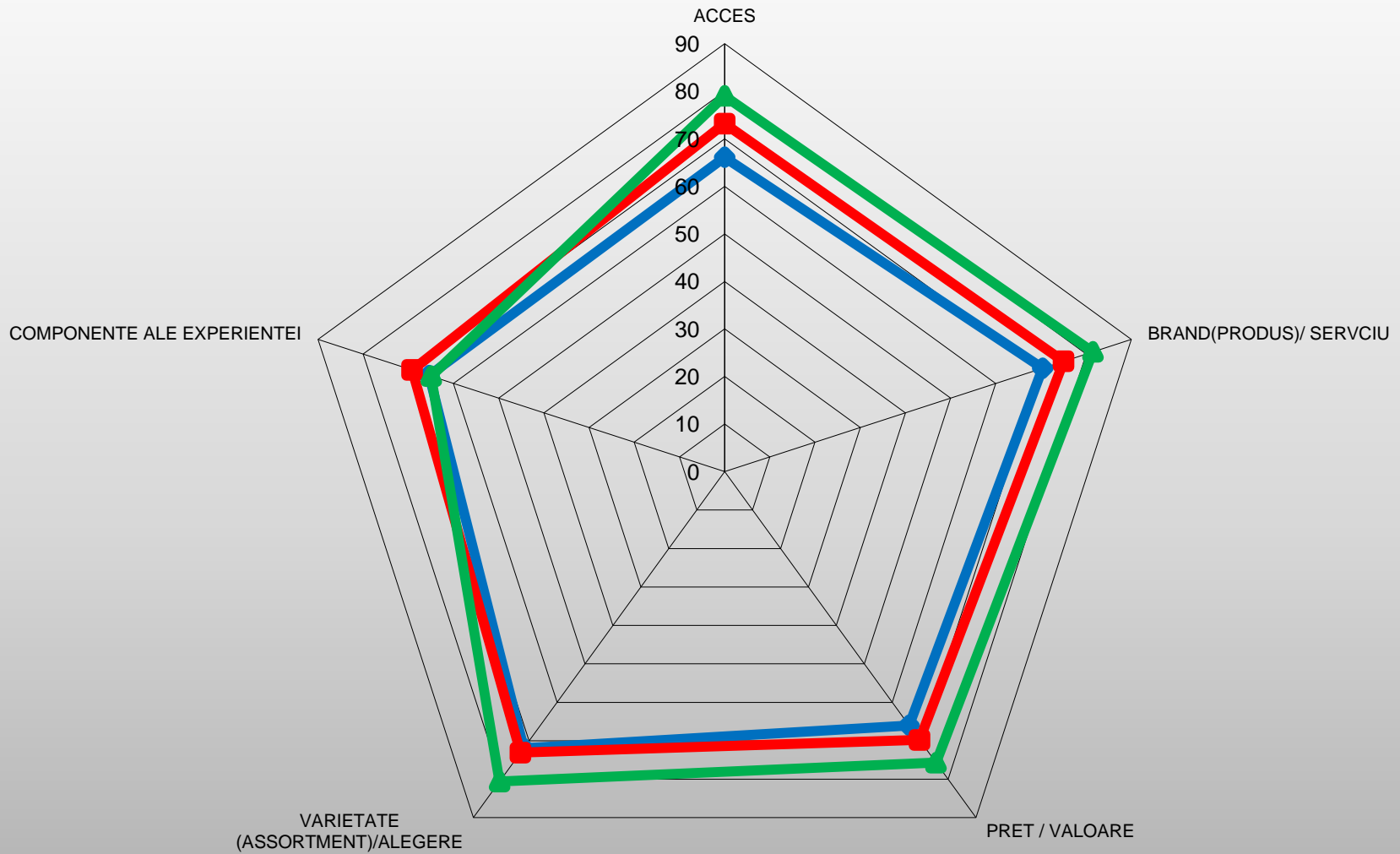
COMPUTER HARDWARE

DOMO
FLANCO

Customer/Shopper Experience Computer Hardware Store

| | DOMO % | FLANCO % | BEST EXPERIENCE % |
|---------------------------------------|------------------|--------------------|---------------------------------------|
| ACCES | 66.11 | 73.20 | 79.03 |
| BRAND(PRODUS)/ SERVCIU | 70.37 | 74.99 | 81.47 |
| PRET / VALOARE | 66.01 | 69.78 | 75.69 |
| VARIETATE (ASSORTMENT)/ALEGERE | 71.94 | 73.09 | 80.59 |
| COMPONENTE ALE EXPERIENTEI | 65,38 | 69,15 | 64,95 |
| Total | 67,96 | 72,04 | 76,35 |



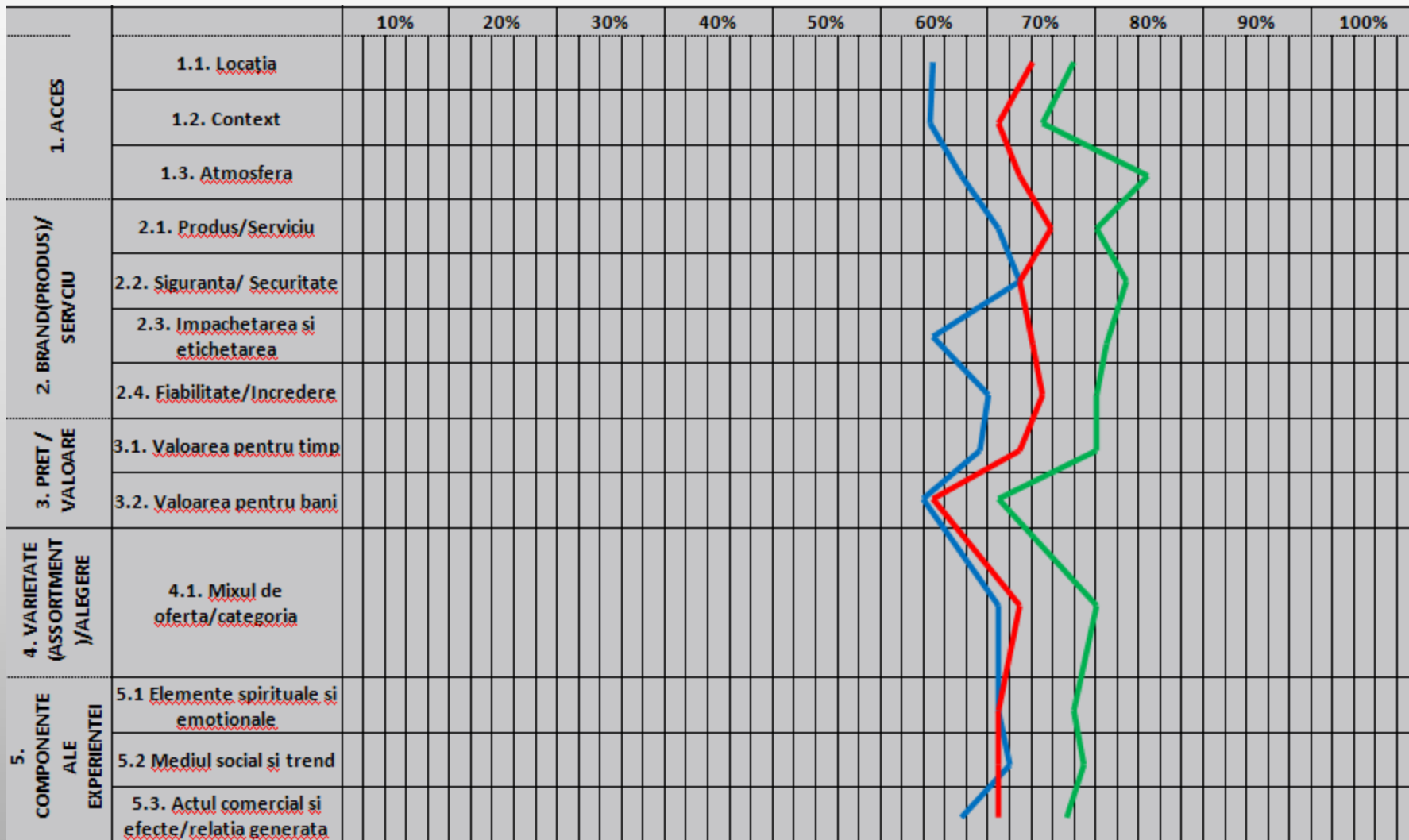


- ◆ Domo
- Flanco
- ▲ Cea mai buna experienta

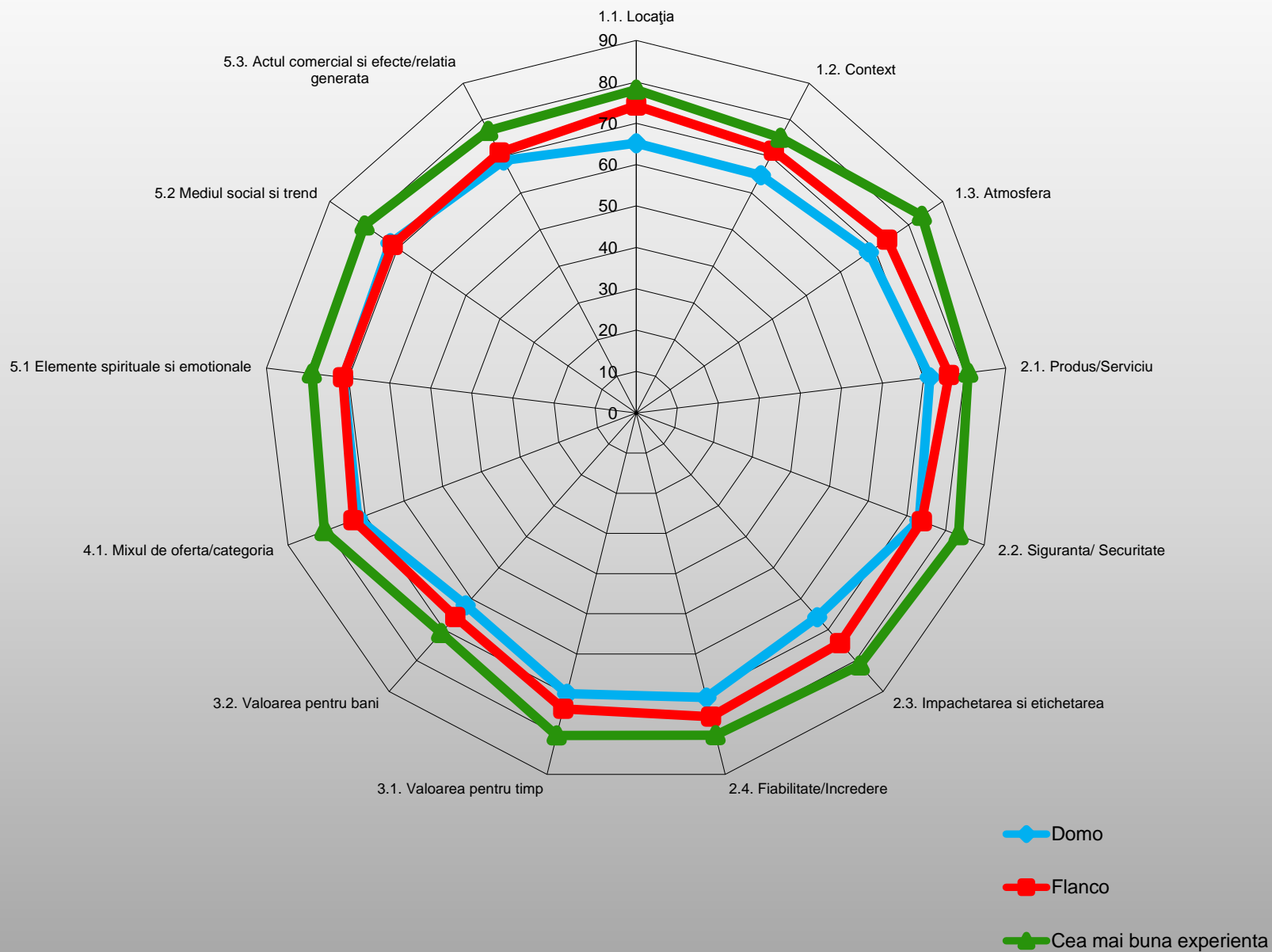
Customer/Shopper Experience Computer Hardware Store

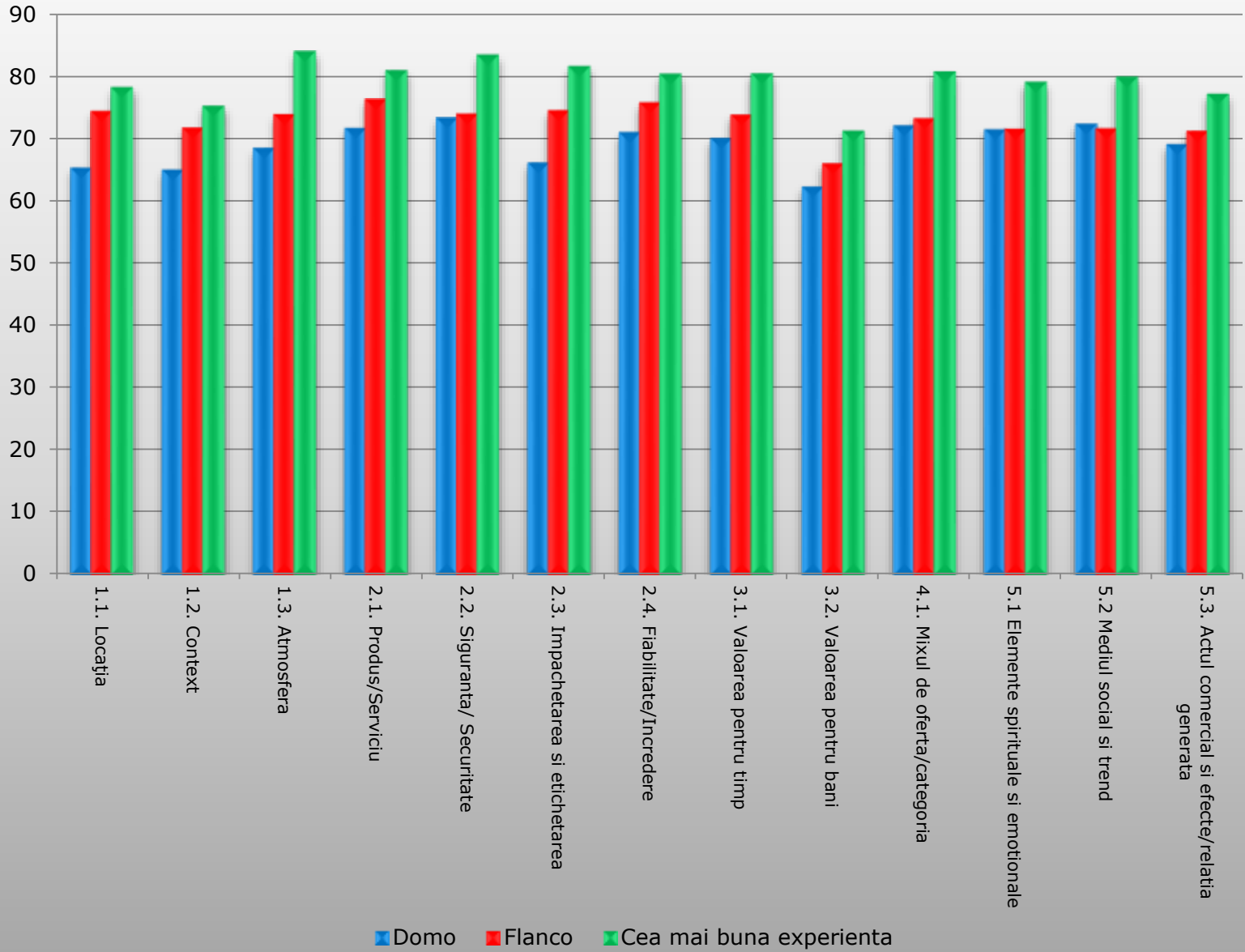
| | Domo % | Flanco % | Cea mai buna experienta % |
|--|--------------|--------------|---------------------------------|
| Criteriul 1 : ACCES | 66.11 | 73.20 | 79.03 |
| 1.1. Locația | 65.17 | 74.28 | 78.11 |
| 1.2. Context | 64.84 | 71.59 | 75.09 |
| 1.3. Atmosfera | 68.33 | 73.72 | 83.89 |
| Criteriul 2 : BRAND(PRODUS)/ SERVICIU | 70.37 | 74.99 | 81.47 |
| 2.1. Produs/Serviciu | 71.50 | 76.17 | 80.83 |
| 2.2. Siguranta/ Securitate | 73.17 | 73.83 | 83.33 |
| 2.3. Impachetarea si etichetarea | 65.95 | 74.33 | 81.50 |
| 2.4. Fiabilitate/Incredere | 70.86 | 75.63 | 80.23 |
| Criteriul 3 : PRET / VALOARE | 66.01 | 69.78 | 75.69 |
| 3.1. Valoarea pentru timp | 69.90 | 73.67 | 80.30 |
| 3.2. Valoarea pentru bani | 62.11 | 65.89 | 71.08 |
| Criteriul 4 : VARIETATE (ASSORTMENT)/ALEGERE | 71.94 | 73.09 | 80.59 |
| 4.1. Mixul de oferta/categoria | 71.94 | 73.09 | 80.59 |
| Criteriul 5 : COMPONENTE ALE EXPERIENTEI | 65,38 | 69,15 | 64,95 |
| 5.1 Elemente spirituale si emotionale | 71.28 | 71.39 | 78.94 |
| 5.2 Mediul social si trend | 72.19 | 71.48 | 79.79 |
| 5.3. Actul comercial si efecte/relatia generata | 68.90 | 71.06 | 77.00 |

Profile of the two computer hardware stores regarding CEM, and the best experience



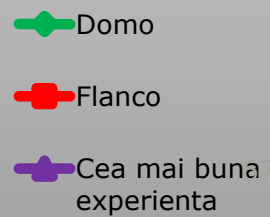
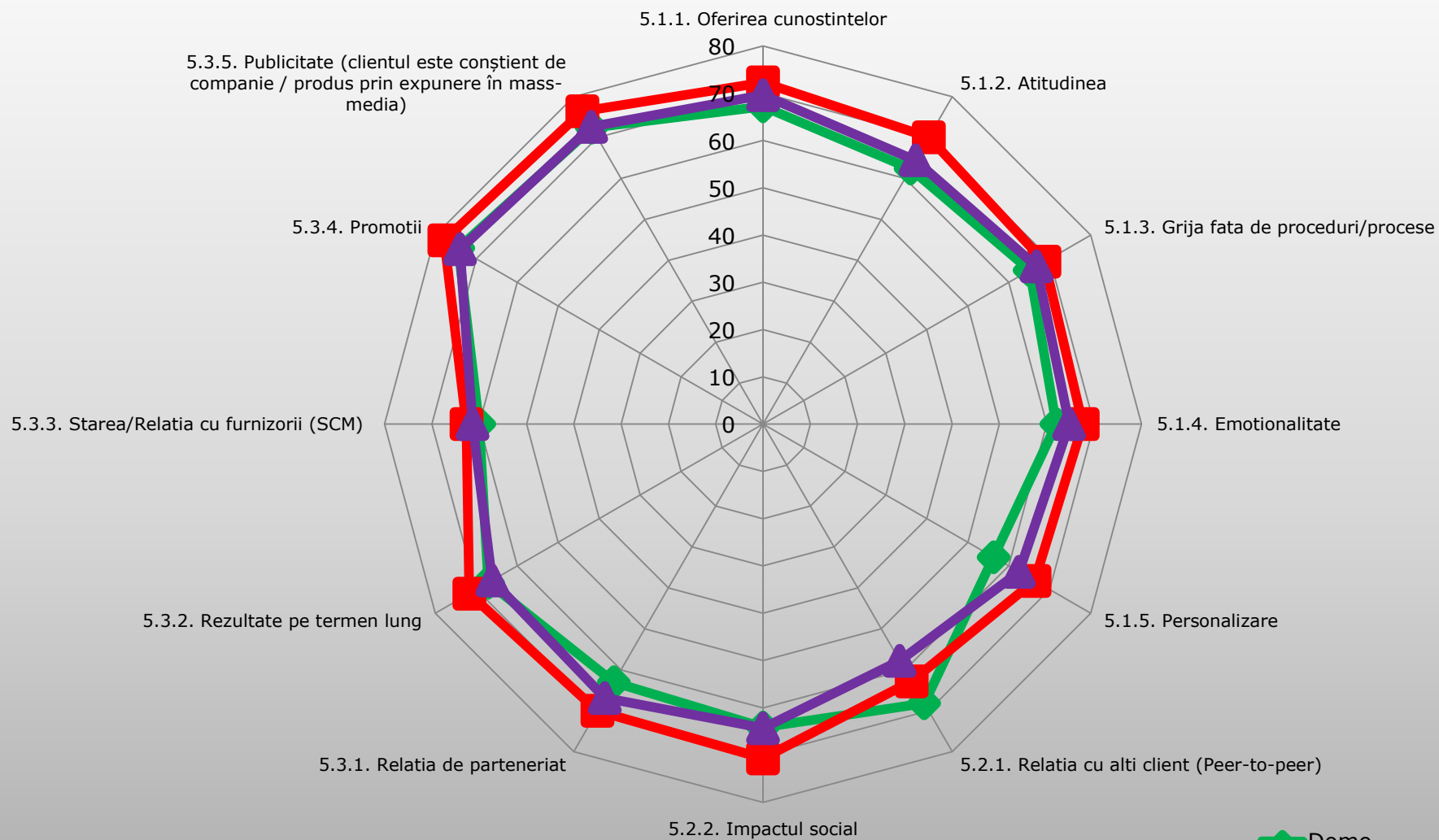
Domo —
 Flanco —
 Best experience —





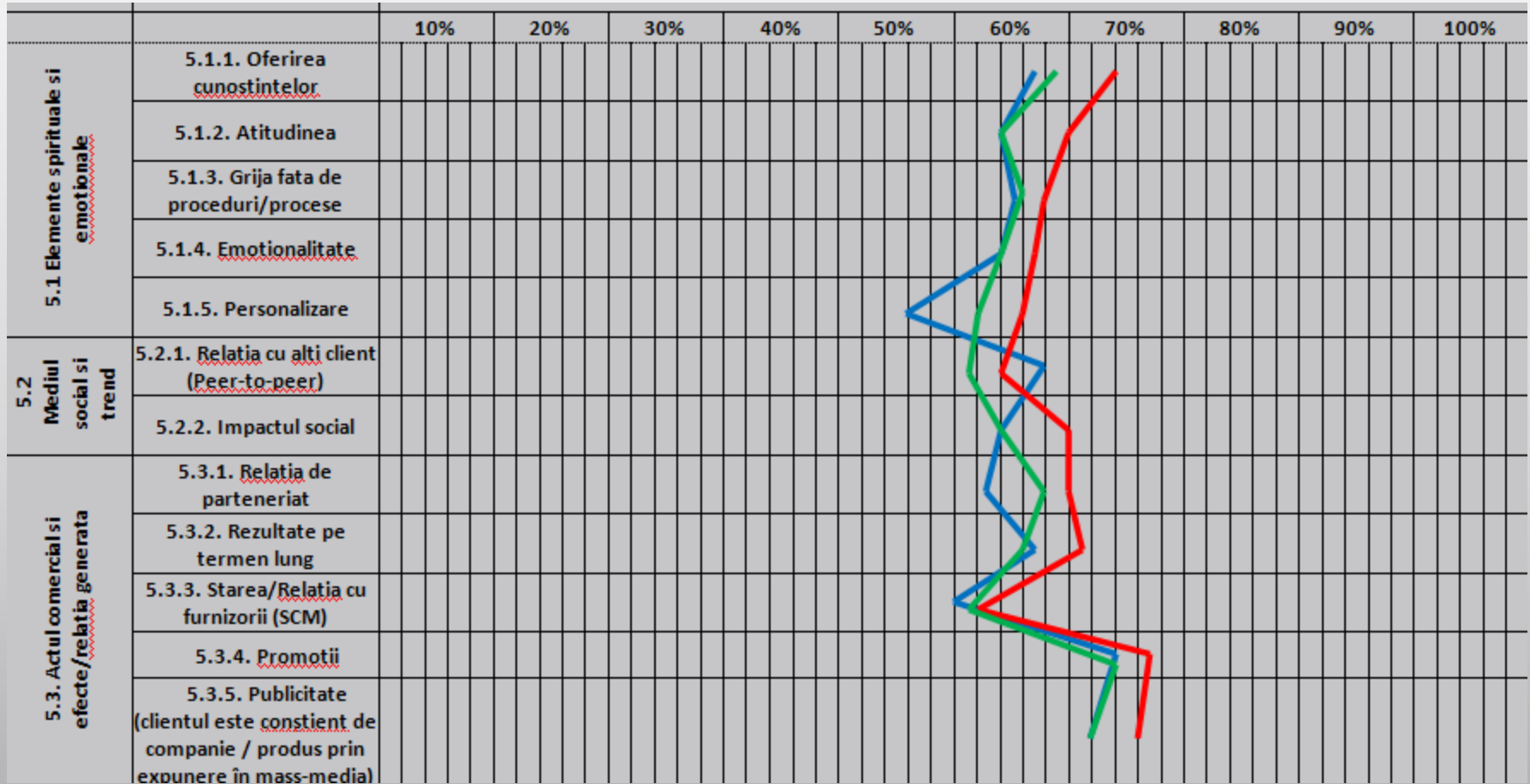
Customer/Shopper Experience Computer Hardware Store Emotional Components

| Criteriul 5 : COMPONENTE ALE EXPERIENTEI | DOMO % | FLANCO % | CEA MAI BUNA EXPERIENTA % |
|--|-------------------|---------------------|--|
| 5.1 Elemente spirituale si emotionale | 62,60 | 68,99 | 65,61 |
| 5.1.1. Oferirea cunostintelor | 67,20 | 72,27 | 69,60 |
| 5.1.2. Atitudinea | 62,40 | 70,08 | 64,45 |
| 5.1.3. Grija fata de proceduri/procese | 65,10 | 68,70 | 66,77 |
| 5.1.4. Emotionalitate | 62,00 | 67,60 | 64,73 |
| 5.1.5. Personalizare | 56,30 | 66,30 | 62,50 |
| 5.2 Mediul social si trend | 66,16 | 66,75 | 61,05 |
| 5.2.1. Relatia cu alti client (Peer-to-peer) | 68,17 | 62,80 | 57,80 |
| 5.2.2. Impactul social | 64,15 | 70,70 | 64,30 |
| 5.3. Actul comercial si efecte/relatia generata | 67,39 | 71,73 | 68,20 |
| 5.3.1. Relatia de parteneriat | 63,03 | 70,03 | 66,89 |
| 5.3.2. Rezultate pe termen lung | 67,10 | 71,70 | 66,10 |
| 5.3.3. Starea/Relatia cu furnizorii (SCM) | 60,00 | 62,70 | 61,40 |
| 5.3.4. Promotii | 74,40 | 77,80 | 74,00 |
| 5.3.5. Publicitate (clientul este conștient de companie / produs prin expunere în mass-media) | 72,40 | 76,40 | 72,60 |



Profile of the two computer hardware stores regarding CEM, and the best experience

- Emotional Components -



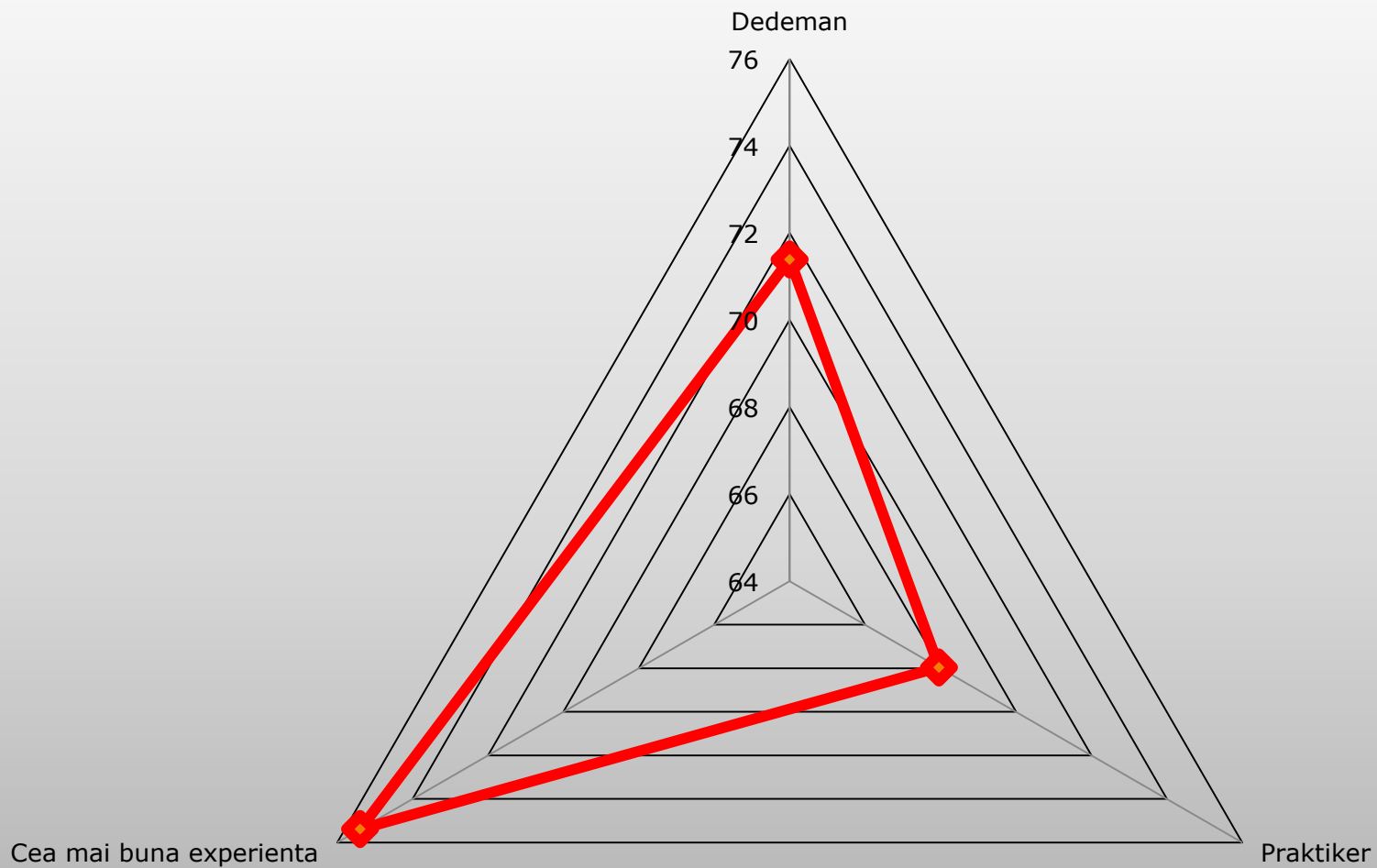
Domo —
 Flanco —
 Best experience —

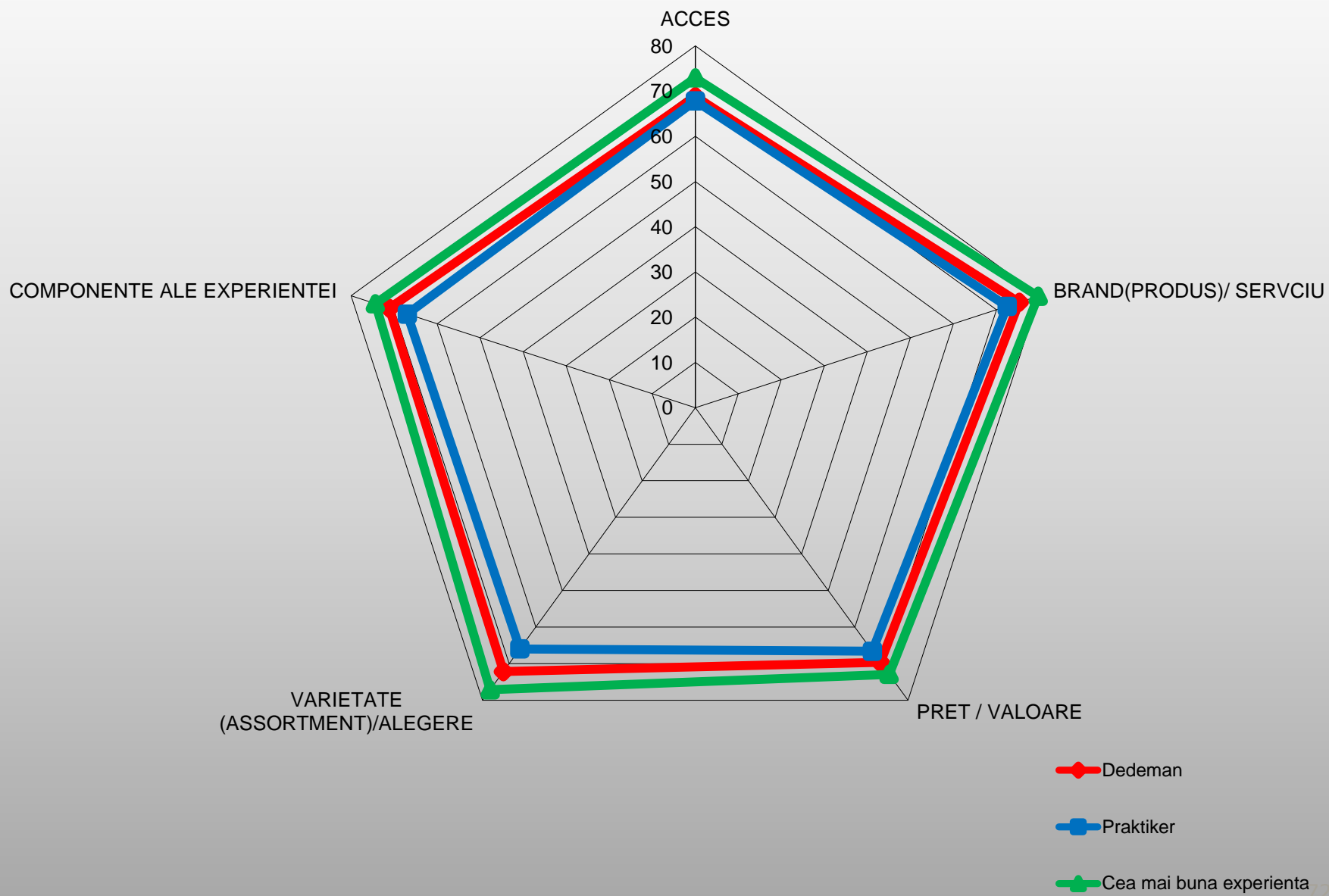
FURNITURE AND HOME DECOR

PRAKTIKER DEDEMAN

Customer/Shopper Experience Furniture and Home Decor Store

| | DEDEMAN % | PRAKTIKER % | CEA MAI BUNA EXPERIENTA % |
|---|--------------|----------------|---------------------------------|
| ACCES | 68,77 | 67,83 | 72,92 |
| BRAND(PRODUS)/ SERVCIU | 75,30 | 72,48 | 79,69 |
| PRET / VALOARE | 69,63 | 66,58 | 72,90 |
| VARIETATE (ASSORTMENT)/ALEGERE | 72,17 | 65,96 | 77,11 |
| COMPONENTE ALE EXPERIENTEI | 71,10 | 66,94 | 74,34 |
| Total | 71,39 | 67,96 | 75,39 |

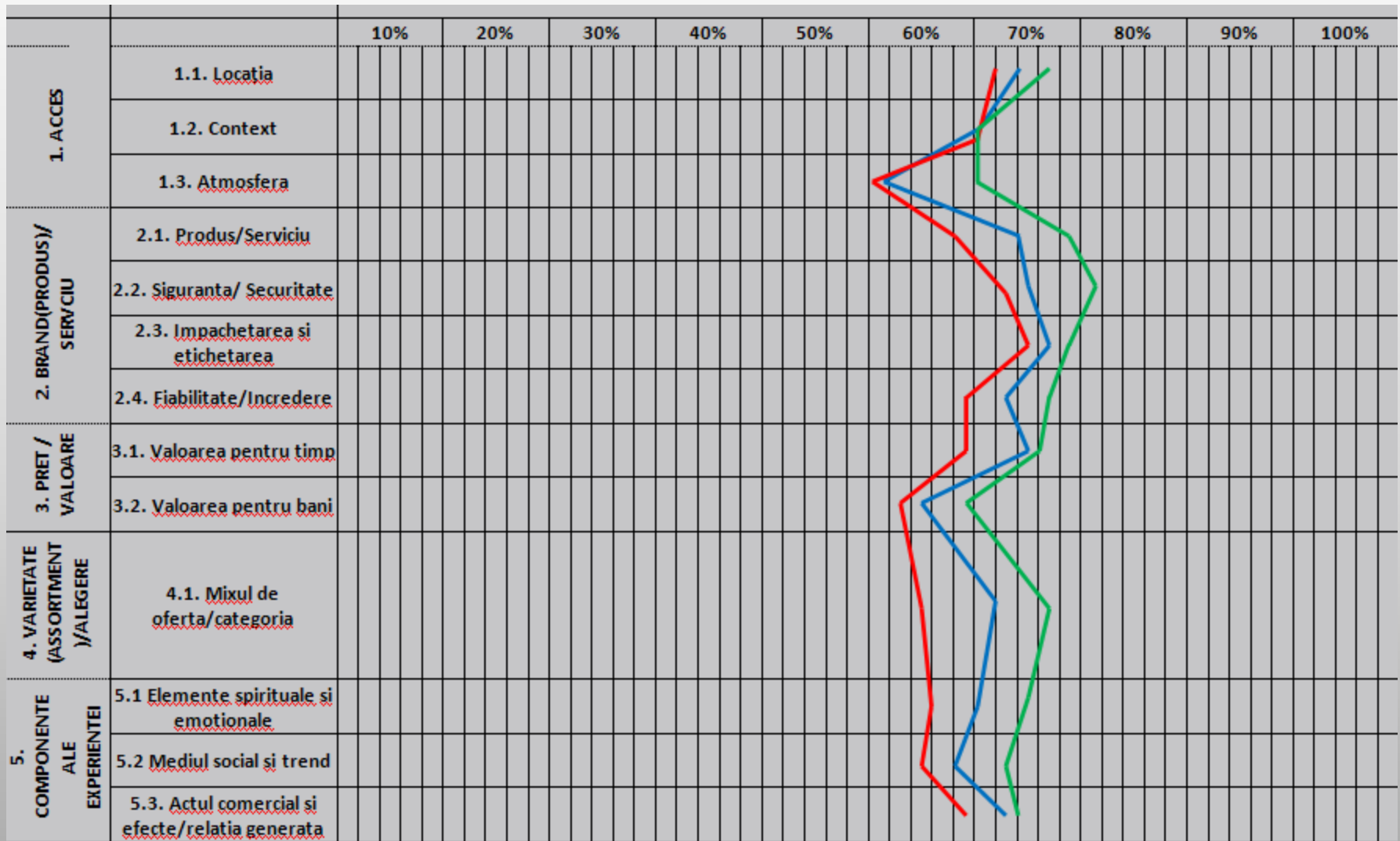




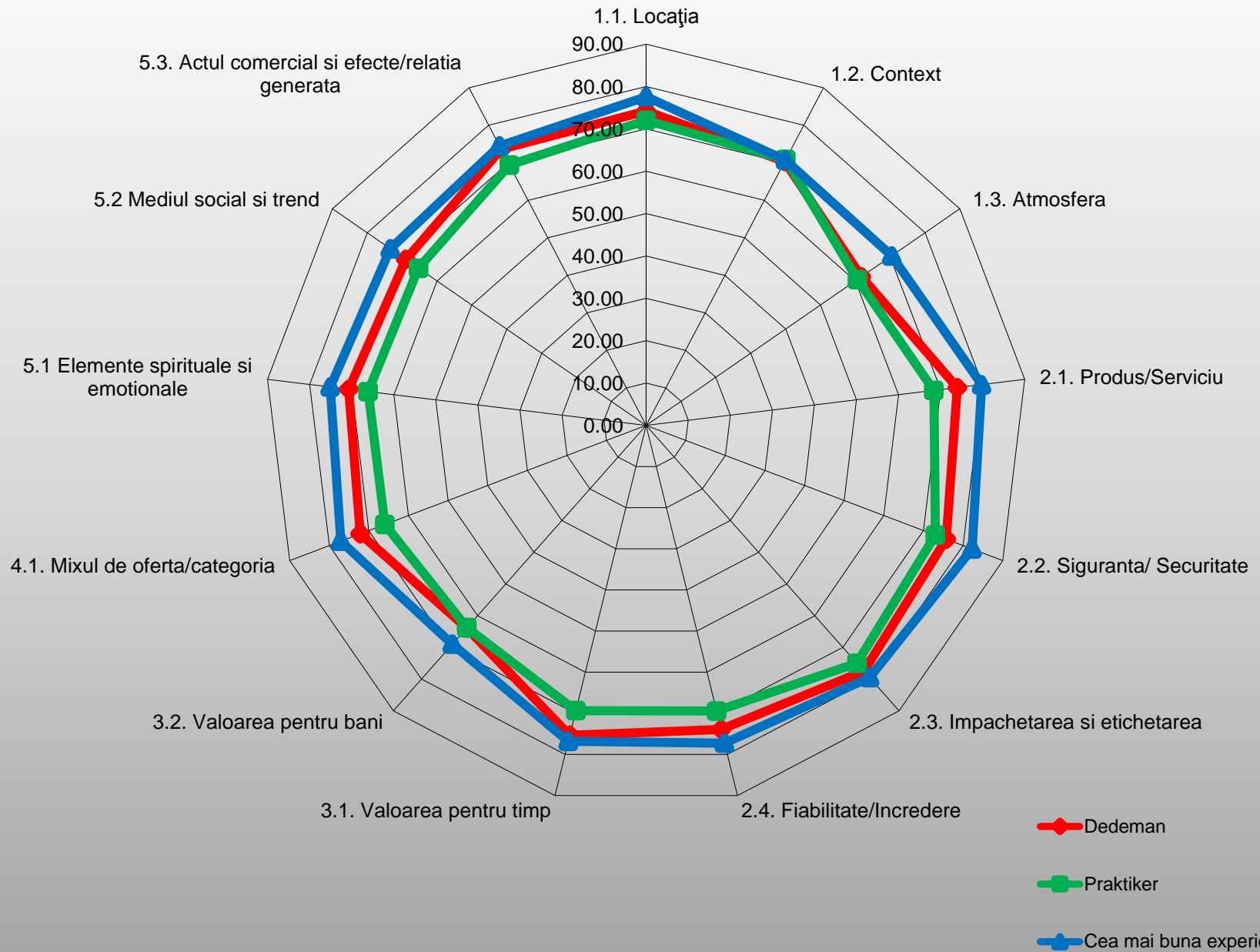
Customer/Shopper Experience Furniture and Home Decor Store

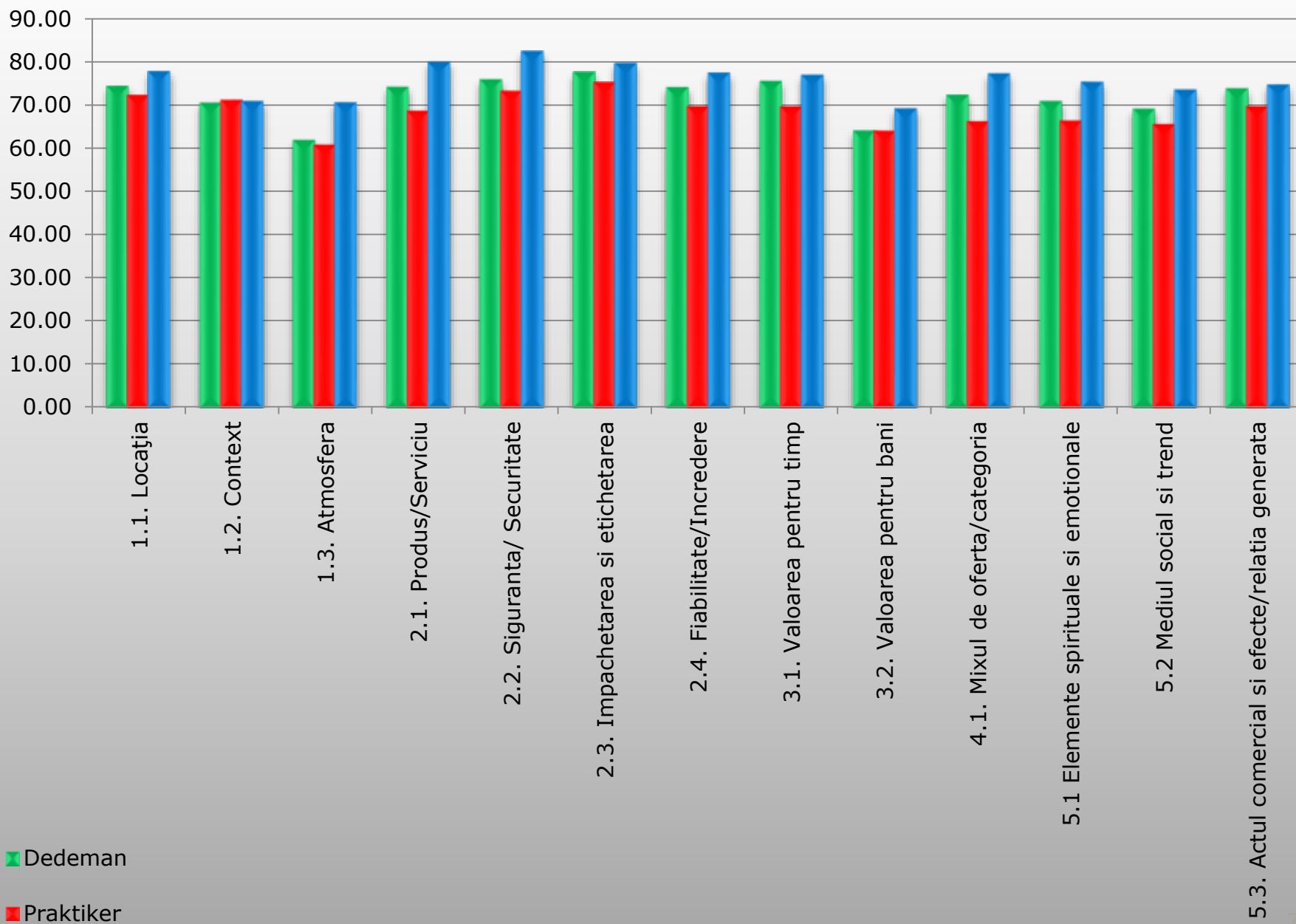
| | DEDEMAN % | PRAKTIKER % | Cea mai buna experienta % |
|--|--------------|----------------|---------------------------------|
| Criteriul 1 : ACCES | 68,77 | 67,83 | 72,92 |
| 1.1. Locația | 74,19 | 72,00 | 77,58 |
| 1.2. Context | 70,37 | 70,90 | 70,75 |
| 1.3. Atmosfera | 61,75 | 60,60 | 70,42 |
| Criteriul 2 : BRAND(PRODUS)/ SERVICIU | 75,30 | 72,48 | 79,69 |
| 2.1. Produs/Serviciu | 74,00 | 68,4 | 79,75 |
| 2.2. Siguranta/ Securitate | 75,75 | 73,00 | 82,25 |
| 2.3. Impachetarea si etichetarea | 77,50 | 75,00 | 79,50 |
| 2.4. Fiabilitate/Incredere | 73,94 | 69,45 | 77,25 |
| Criteriul 3 : PRET / VALOARE | 69,63 | 66,58 | 72,90 |
| 3.1. Valoarea pentru timp | 75,35 | 69,36 | 76,80 |
| 3.2. Valoarea pentru bani | 63,92 | 63,80 | 69,00 |
| Criteriul 4 : VARIETATE (ASSORTMENT)/ALEGERE | 71,10 | 66,94 | 74,34 |
| 4.1. Mixul de oferta/categoria | 72,17 | 65,96 | 77,11 |
| Criteriul 5 : COMPONENTE ALE EXPERIENTEI | 71,39 | 67,96 | 75,39 |
| 5.1 Elemente spirituale si emotionale | 70,71 | 66,11 | 75,13 |
| 5.2 Mediul social si trend | 68,96 | 65,30 | 73,38 |
| 5.3. Actul comercial si efecte/relatia generata | 73,63 | 69,41 | 74,51 |

Profile of the two Furniture and Home Decor stores regarding CEM, and the best experience



Dedeman ————
 Praktiker ————
 Best experience ————





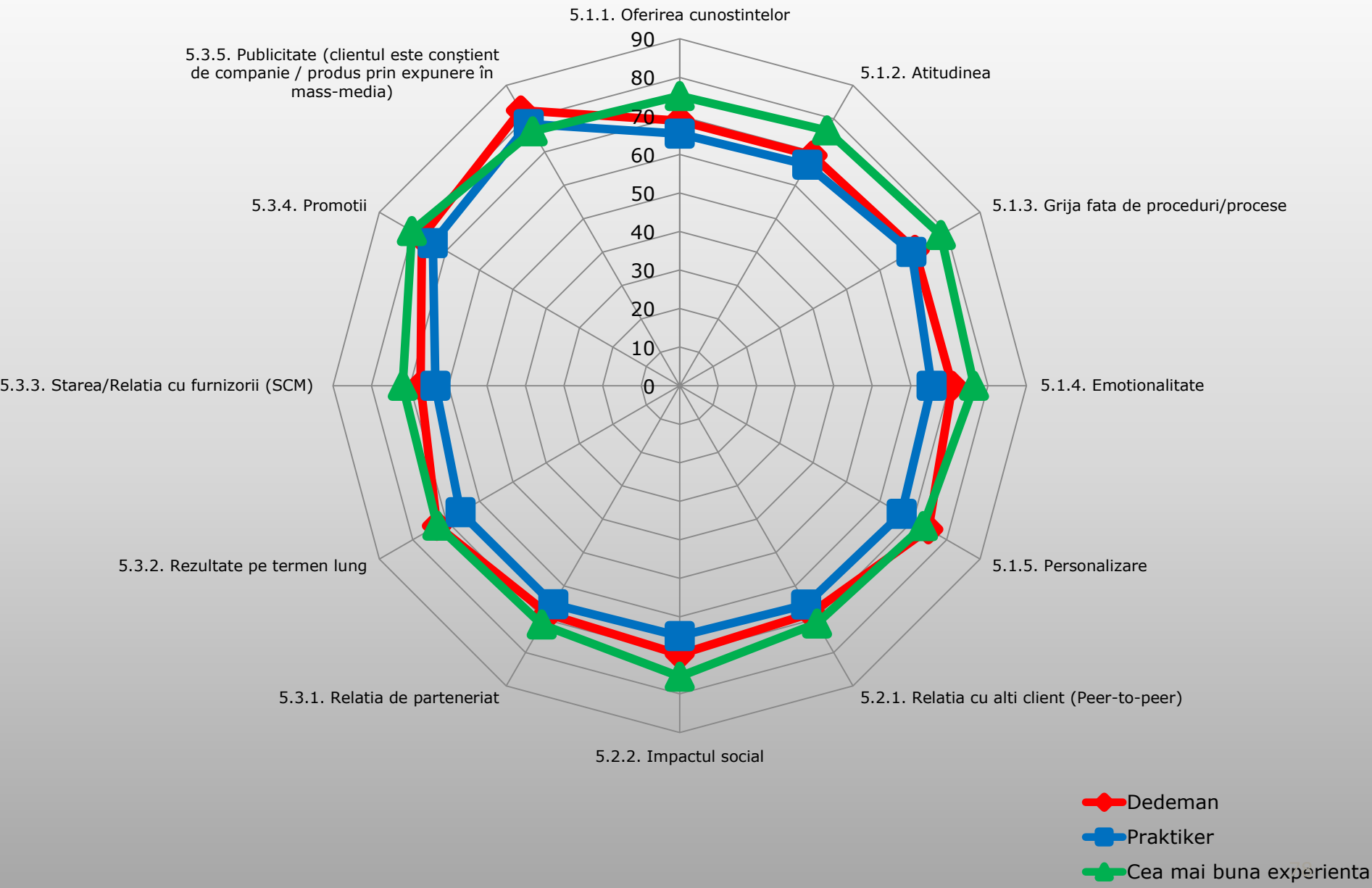
■ Dedeman

■ Praktiker

■ Cea mai buna experienta

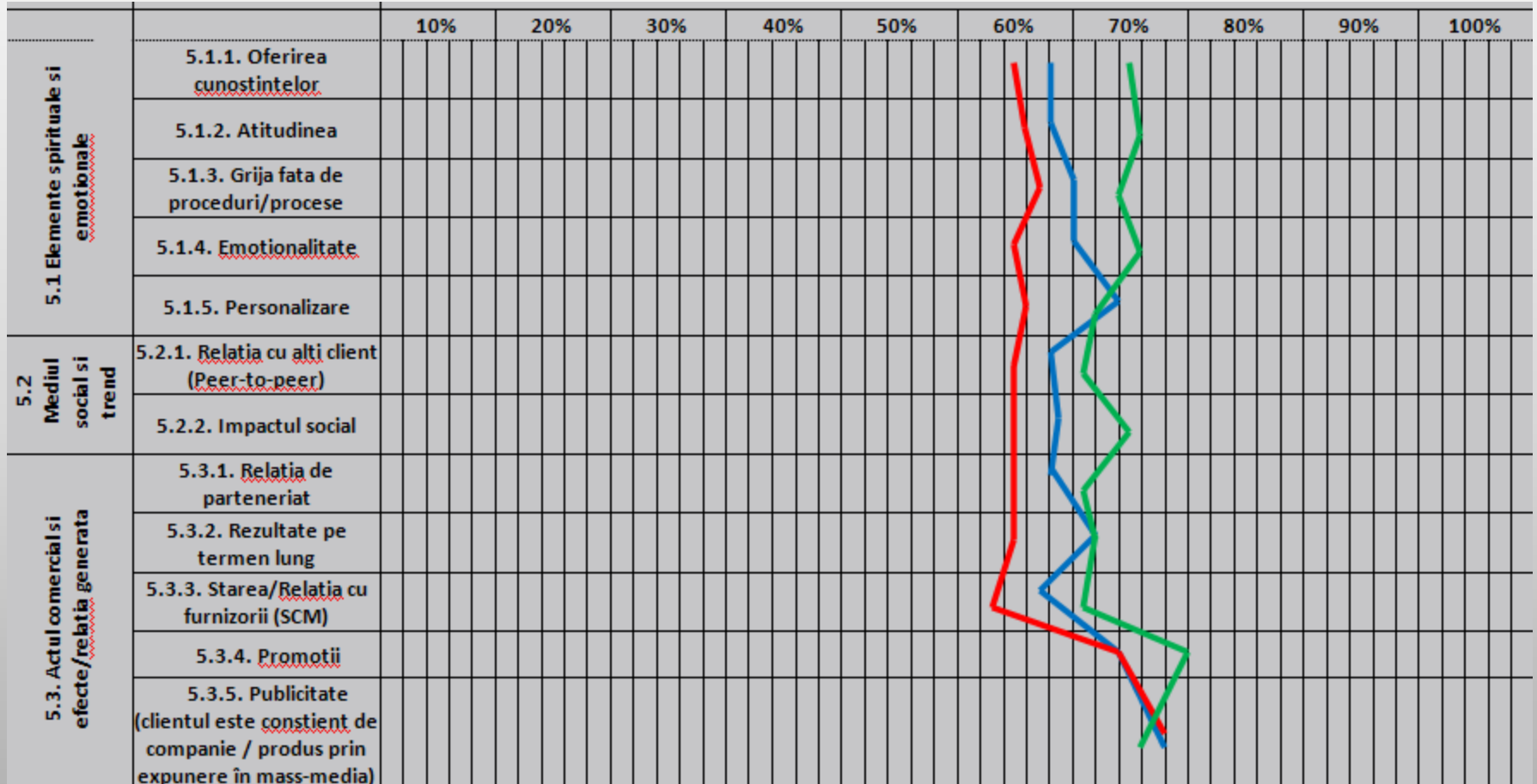
**Customer/Shopper Experience
Computer Hardware Store
Emotional Components**

| Criteriul 5 : COMPONENTE ALE EXPERIENTEI | DEDEMAN % | PRAKTIKER % | CEA MAI BUNA EXPERIENTA % |
|---|----------------------|------------------------|--|
| 5.1 Elemente spirituale si emotionale | 71,10 | 66,94 | 74,34 |
| 5.1.1. Oferirea cunostintelor | 70,71 | 66,11 | 75,13 |
| 5.1.2. Atitudinea | 68,75 | 65,40 | 75,17 |
| 5.1.3. Grija fata de proceduri/procese | 68,97 | 66,18 | 76,47 |
| 5.1.4. Emotionalitate | 70,54 | 67,05 | 74,67 |
| 5.1.5. Personalizare | 70,75 | 65,40 | 76,42 |
| 5.2 Mediul social si trend | 74,56 | 66,50 | 72,94 |
| 5.2.1. Relatia cu alti client (Peer-to-peer) | 68,96 | 65,30 | 73,38 |
| 5.2.2. Impactul social | 68,17 | 65,60 | 71,25 |
| 5.3. Actul comercial si efecte/relatia generata | 69,75 | 65,00 | 75,50 |
| 5.3.1. Relatia de parteneriat | 73,63 | 69,41 | 74,51 |
| 5.3.2. Rezultate pe termen lung | 68,40 | 65,54 | 71,57 |
| 5.3.3. Starea/Relatia cu furnizorii (SCM) | 72,75 | 65,70 | 72,63 |
| 5.3.4. Promotii | 67,25 | 63,40 | 71,88 |
| 5.3.5. Publicitate (clientul este conștient de companie / produs prin expunere în mass-media) | 77,25 | 74,00 | 80,25 |



◆ Dedeman
■ Praktiker
▲ Cea mai buna experienta

Profile of the two Furniture and Home Decor Stores regarding CEM, and the best experience - Emotional Components -



Dedeman —
 Praktiker —
 Best experience —

RESTAURANTS

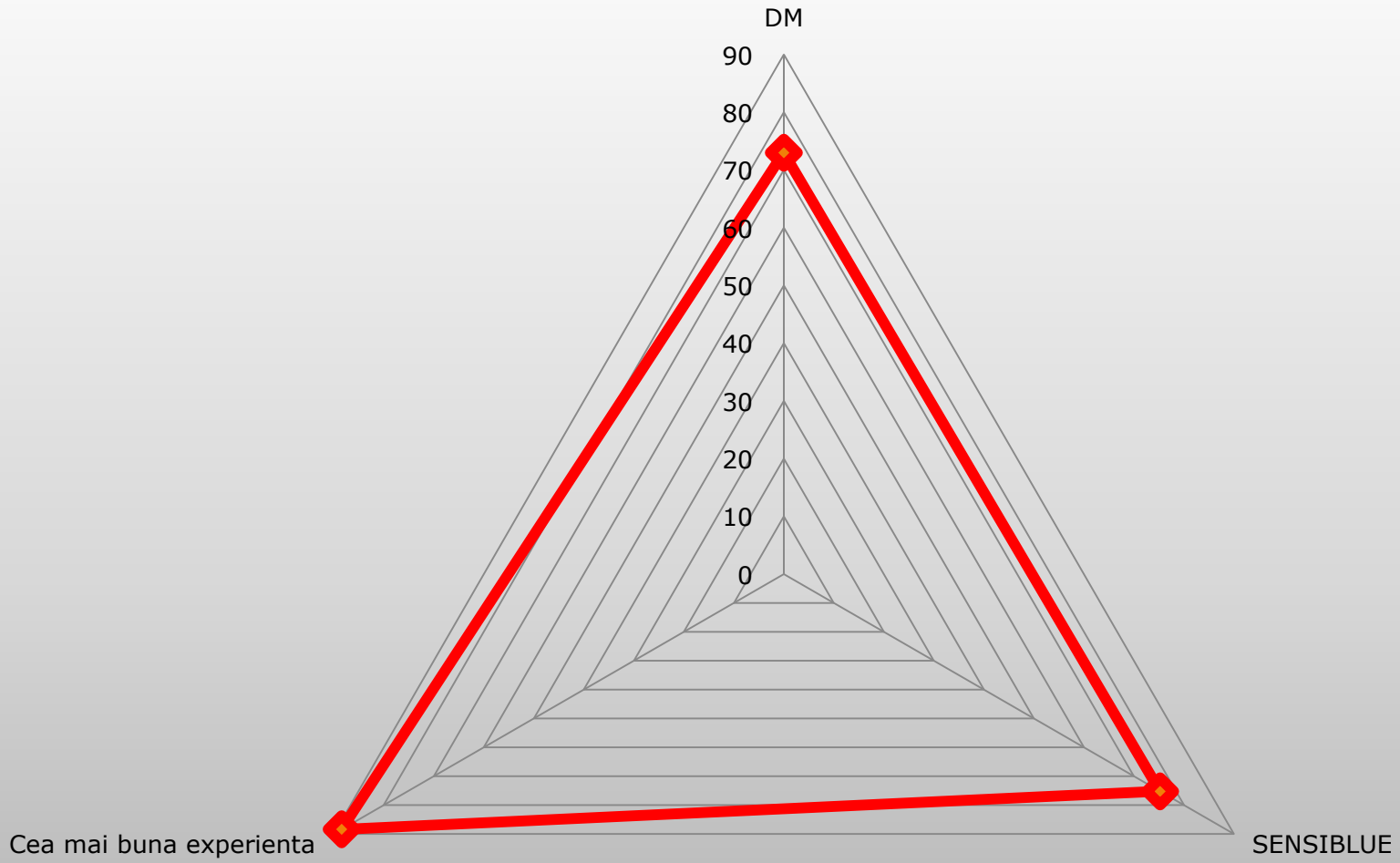
**SOLARINO
BELVEDERE**

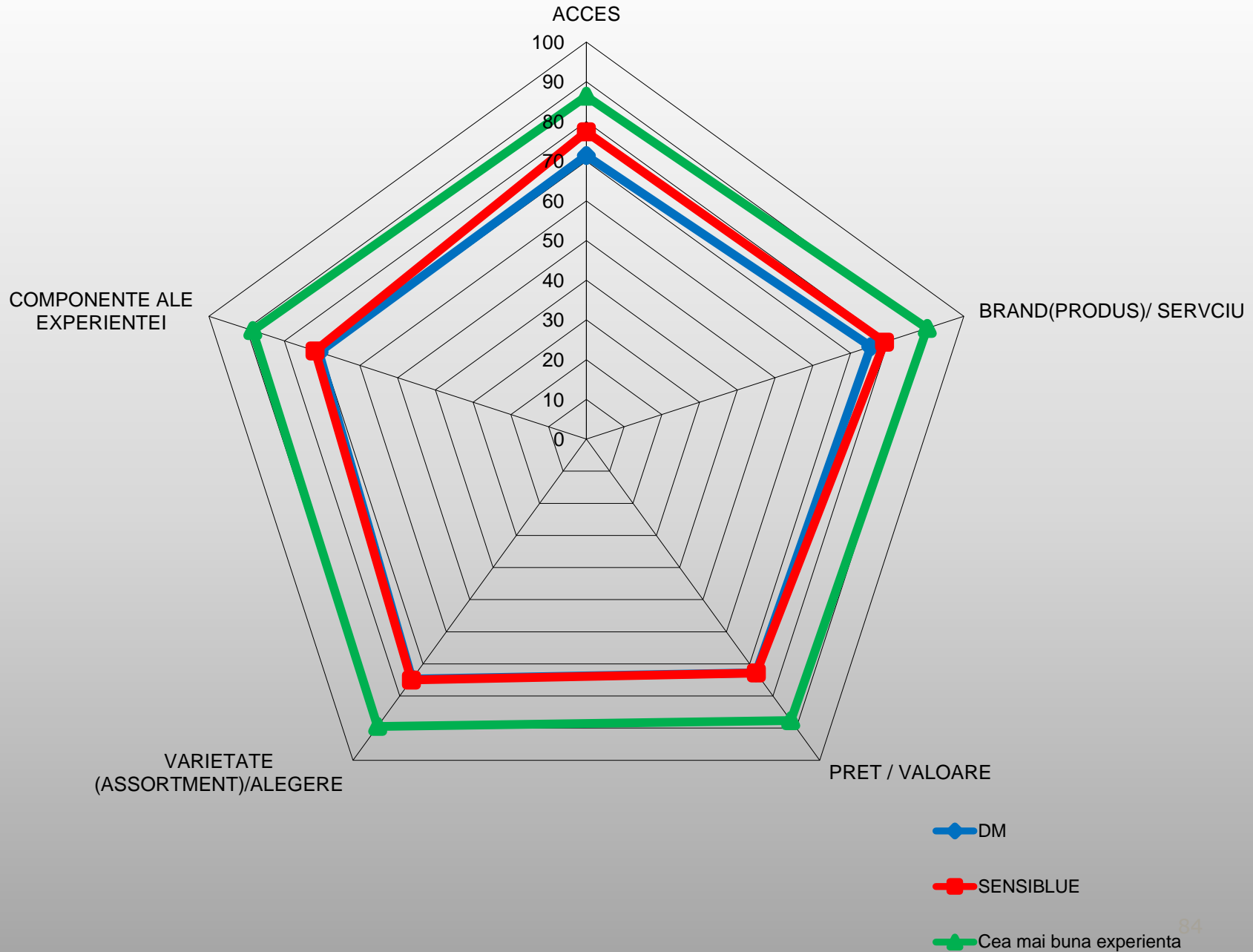
Health, Beauty, and Cosmetics (HBC)

**DROGERIE MARKT (DM)
SENSIBLU**

Customer/Shopper Experience
Health, Beauty, and Cosmetics (HBC) Store

| | DM % | SENSIBLU % | BEST EXPERIENCE % |
|--|----------------|----------------------|---------------------------------------|
| 1. ACCES | 71.41 | 77.39 | 86.37 |
| 2. BRAND(PRODUS)/ SERVCIU | 75.36 | 79.01 | 90.30 |
| 3. PRET / VALOARE | 72.75 | 72.83 | 87.65 |
| 4. VARIETATE (ASSORTMENT)/ALEGERE | 74.71 | 75.04 | 89.47 |
| 5. COMPONENTE ALE EXPERIENTEI | 70.83 | 71.86 | 88.38 |
| Total | 73.01 | 75.23 | 88.43 |

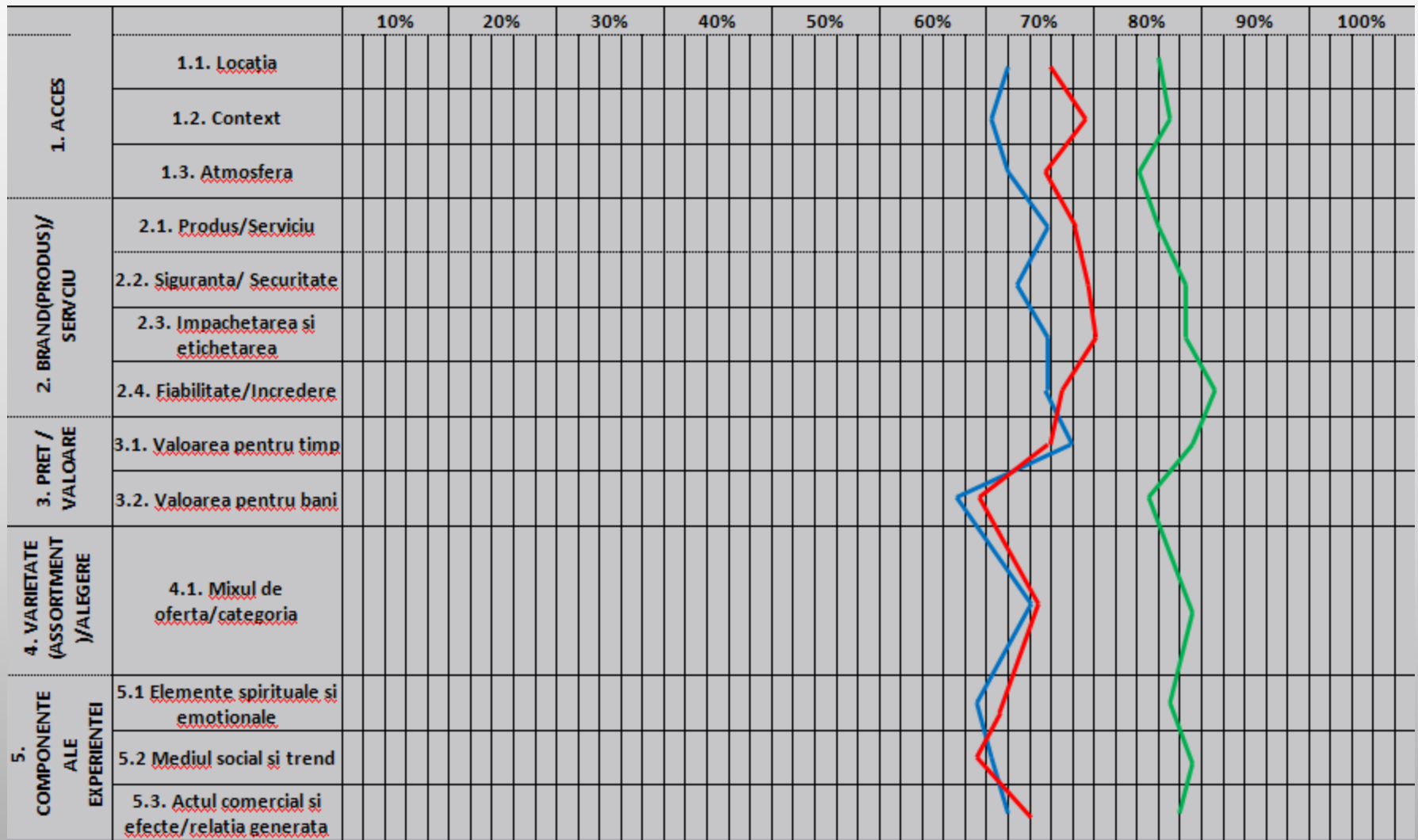




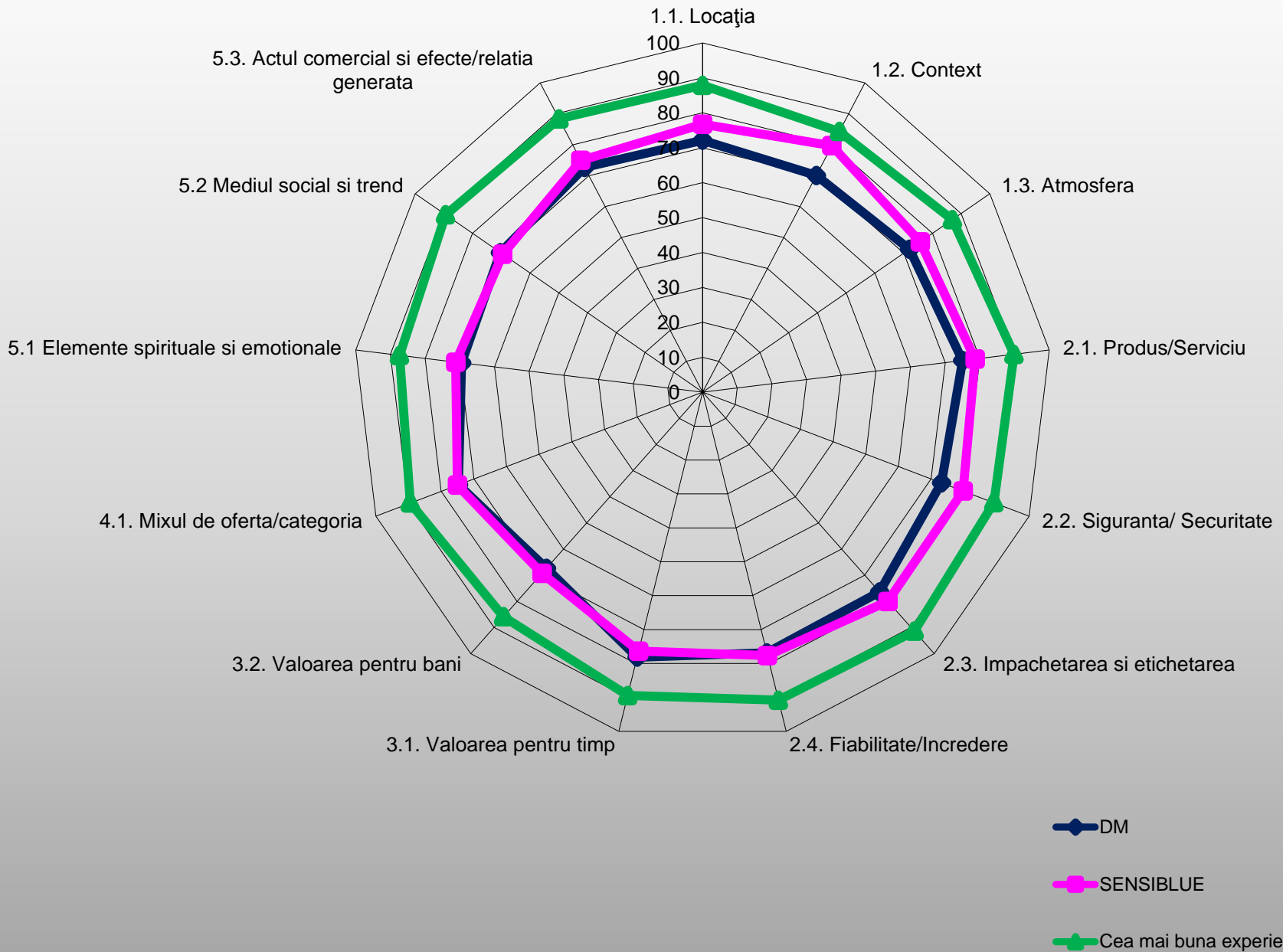
Customer/Shopper Experience Health, Beauty, and Cosmetics (HBC) Store

| | DM % | SENSIBLU % | Cea mai buna experienta % |
|--|--------------|---------------|---------------------------------|
| Criteriaul 1 : ACCES | 71.41 | 77.39 | 86.37 |
| 1.1. Locația | 72.13 | 76.73 | 87.87 |
| 1.2. Context | 70.10 | 79.70 | 84.30 |
| 1.3. Atmosfera | 72.00 | 75.73 | 86.93 |
| Criteriaul 2 : BRAND(PRODUS)/ SERVICIU | 75.36 | 79.01 | 90.30 |
| 2.1. Produs/Serviciu | 75.00 | 78.60 | 89.80 |
| 2.2. Siguranta/ Securitate | 73.17 | 79.80 | 89.20 |
| 2.3. Impachetarea si etichetarea | 76.40 | 80.00 | 91.40 |
| 2.4. Fiabilitate/Incredere | 76.86 | 77.65 | 90.80 |
| Criteriaul 3 : PRET / VALOARE | 72.75 | 72.83 | 87.65 |
| 3.1. Valoarea pentru timp | 78.13 | 76.36 | 89.44 |
| 3.2. Valoarea pentru bani | 67.37 | 69.30 | 85.87 |
| Criteriaul 4 : VARIETATE (ASSORTMENT)/ALEGERE | 74.71 | 75.04 | 89.47 |
| 4.1. Mixul de oferta/categoria | 74.71 | 75.04 | 89.47 |
| Criteriaul 5 : COMPONENTE ALE EXPERIENTEI | 70.83 | 71.86 | 88.38 |
| 5.1 Elemente spirituale si emotionale | 69.46 | 71.15 | 87.38 |
| 5.2 Mediul social si trend | 70.34 | 69.50 | 89.38 |
| 5.3. Actul comercial si efecte/relatia generata | 72.68 | 74.94 | 88.39 |

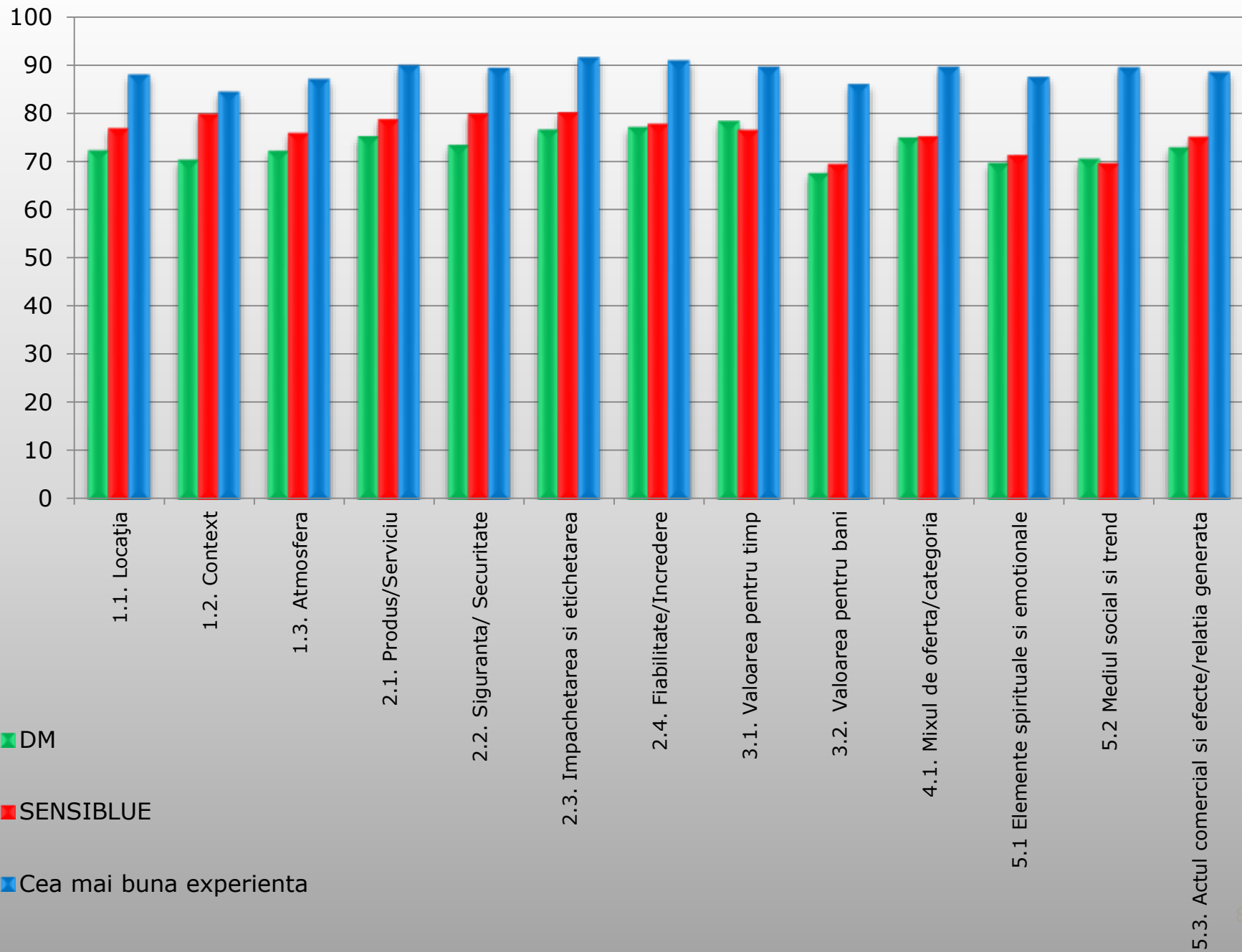
Profile of the two Health, Beauty, and Cosmetics (HBC) Stores regarding CEM, and the best experience



DM —
 SENSIBLU —
 Best experience —

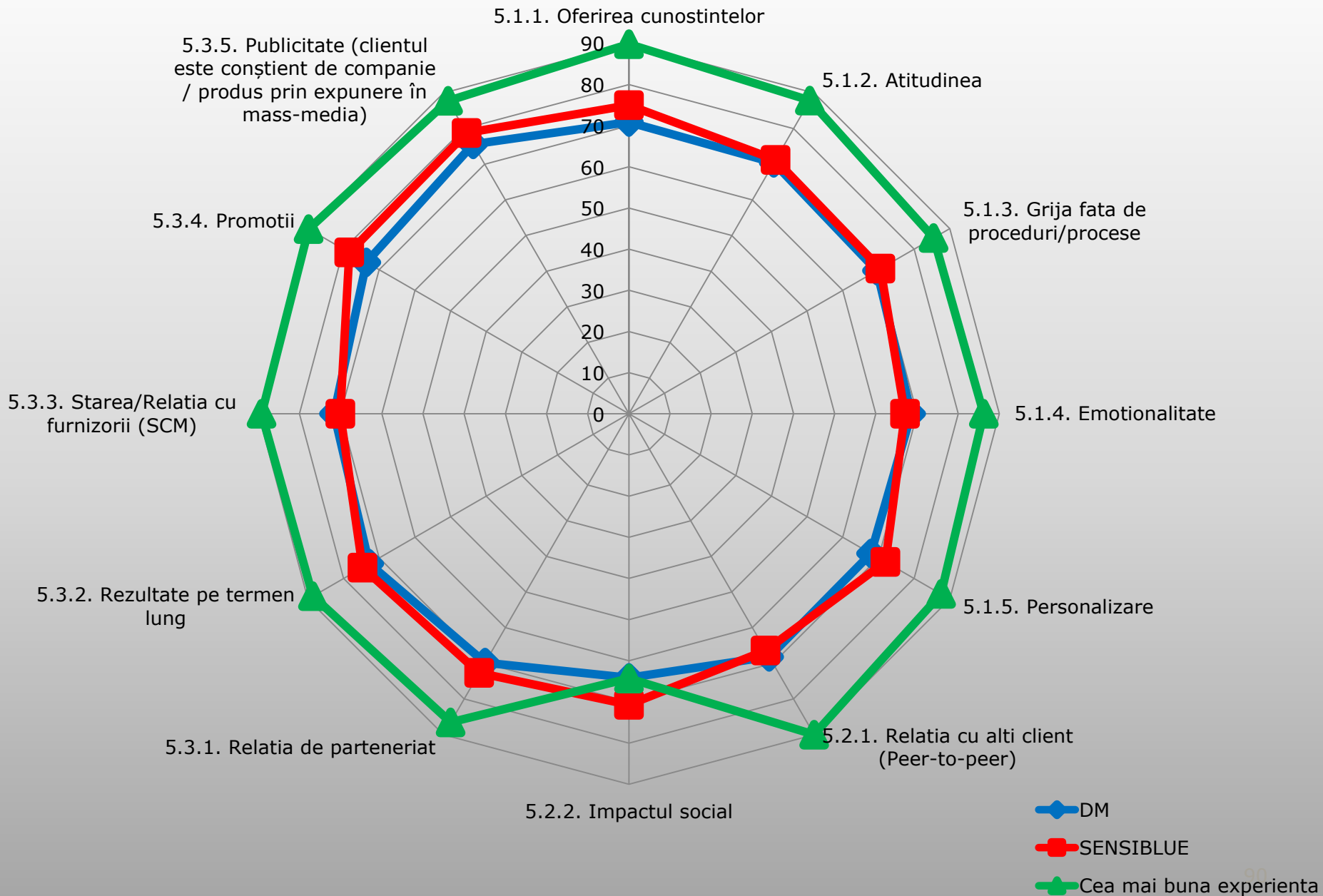


● DM
 ■ SENSIBLUE
 ● Cea mai buna experienta

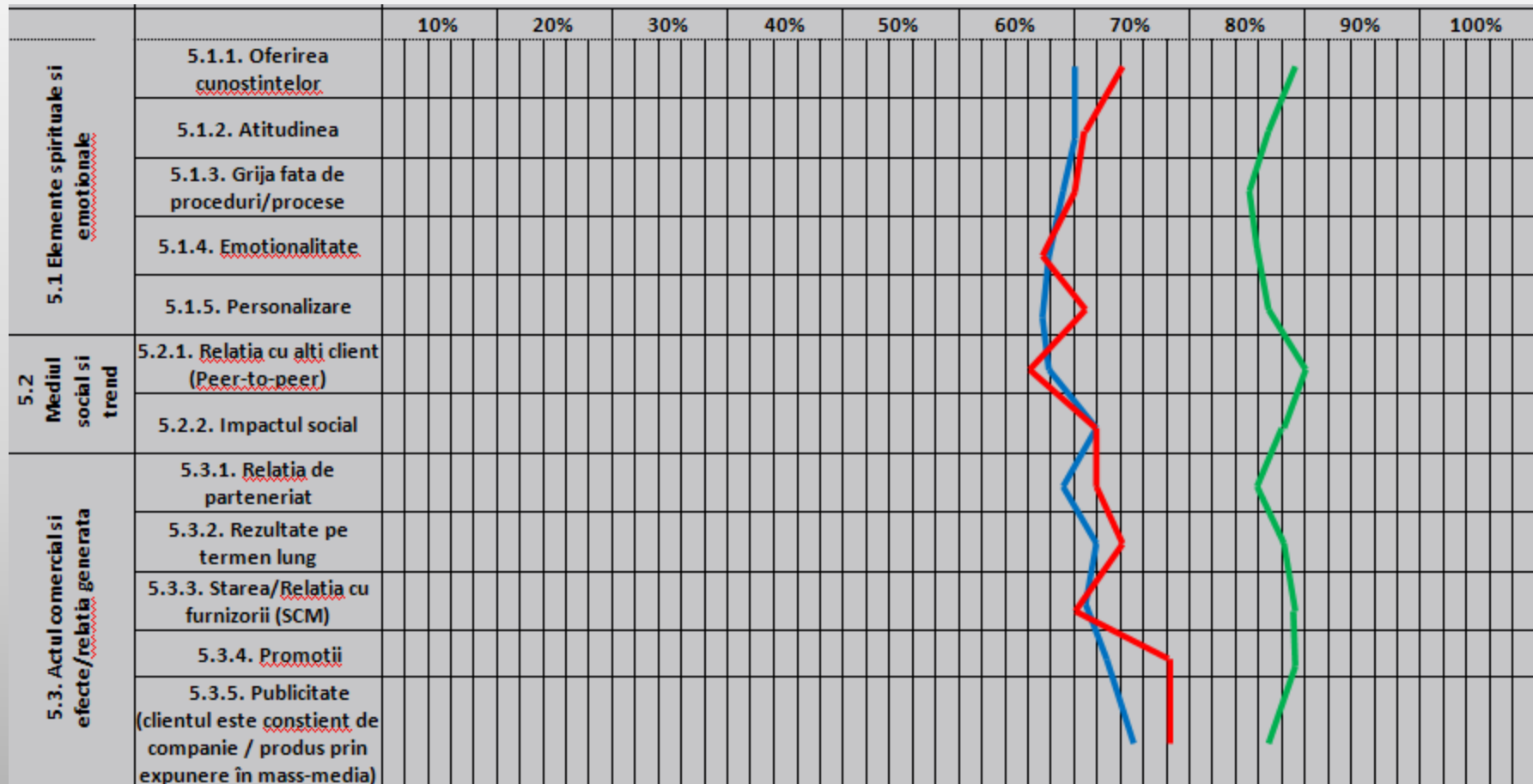


**Customer/Shopper Experience
Health, Beauty, and Cosmetics (HBC) Store
Emotional Components**

| Criteriul 5 : COMPONENTE ALE EXPERIENTEI | DM % | SENSIBLU % | CEA MAI BUNA EXPERIENTA % |
|---|-----------------|-----------------------|--|
| 5.1 Elemente spirituale si emotionale | 69,46 | 71,15 | 87,38 |
| 5.1.1. Oferirea cunostintelor | 70,87 | 74,97 | 89,80 |
| 5.1.2. Atitudinea | 70,40 | 71,23 | 87,88 |
| 5.1.3. Grija fata de proceduri/procese | 69,55 | 70,55 | 85,47 |
| 5.1.4. Emotionalitate | 68,60 | 67,07 | 86,20 |
| 5.1.5. Personalizare | 67,90 | 71,95 | 87,55 |
| 5.2 Mediul social si trend | 70,34 | 69,50 | 89,38 |
| 5.2.1. Relatia cu alti client (Peer-to-peer) | 68,17 | 66,40 | 90,00 |
| 5.2.2. Impactul social | 72,50 | 72,60 | 88,75 |
| 5.3. Actul comercial si efecte/relatia generata | 72,68 | 74,94 | 88,39 |
| 5.3.1. Relatia de parteneriat | 69,80 | 72,69 | 86,54 |
| 5.3.2. Rezultate pe termen lung | 72,80 | 74,70 | 88,60 |
| 5.3.3. Starea/Relatia cu furnizorii (SCM) | 71,60 | 70,10 | 89,20 |
| 5.3.4. Promotii | 73,60 | 78,40 | 89,80 |
| 5.3.5. Publicitate (clientul este conștient de companie / produs prin expunere în mass- media) | 75,60 | 78,80 | 87,80 |



Profile of the two Health, Beauty, and Cosmetics (HBC) Store regarding CEM, and the best experience - Emotional Components -



DM ———
 SENSIBLU ———
 Best experience ———

*Thank you for
your
attention!*