

*Viktoriia Lisitsa***OMNICHANNEL SALES: TRENDS, PROBLEMS AND PROSPECTS  
IN UKRAINIAN RETAIL***Вікторія Лісіца***ОМНИКАНАЛЬНІ ПРОДАЖІ: ТЕНДЕНЦІЇ, ПРОБЛЕМИ ТА ПЕРСПЕКТИВИ  
РОЗВИТКУ В УКРАЇНСЬКОМУ РИТЕЙЛІ***Виктория Лисица***ОМНИКАНАЛЬНЫЕ ПРОДАЖИ: ТЕНДЕНЦИИ, ПРОБЛЕМЫ И  
ПЕРСПЕКТИВЫ РАЗВИТИЯ В УКРАИНСКОМ РИТЕЙЛЕ**

*The article considers the main trends, problems and prospects for the development of omnichannel trade in the world and Ukrainian retail. The concepts of mono-, multi- and omnichannel trade are studied; attention is focused on their comparative characteristics. The factors influencing the development of omnichannel trade in the world retail are determined. The main directions of the transformation of business processes of retail companies in the context of the introduction of omnichannel trade are described. The advantages and risks of introducing omnichannel trade into the activities of domestic retailers are outlined.*

**Key words:** retail network, retail trade, off-line trade, on-line trade, omnichannel trade.

*Tabl.: 1. Bibl.: 15.*

*Розглянуто основні тенденції, проблеми та перспективи розвитку омніканальної торгівлі у світовому та українському ритейлі. Досліджено поняття моно-, мульти- та омніканальної торгівлі, акцентована увага на їхніх відмінностях. Визначено фактори, що сприяють розвитку омніканальної торгівлі у світовому ритейлі. Охарактеризовано основні напрями трансформації бізнес-процесів роздрібних компаній за умов впровадження омніканальної торгівлі. Визначено переваги та ризики запровадження омніканальної торгівлі у діяльність вітчизняних ритейлерів.*

**Ключові слова:** торговельна мережа; роздрібна торгівля; offline-торгівля; online-торгівля; омніканальна торгівля.

*Рис.: 4. Табл.: 1. Бібл.: 15.*

*Рассмотрены основные тенденции, проблемы и перспективы развития омниканальной торговли в мировом и украинском ритейле. Исследованы понятия моно-, мульти- и омниканальной торговли, акцентировано внимание на их сравнительной характеристике. Определены факторы, влияющие на развитие омниканальной торговли в мировом ритейле. Охарактеризованы основные направления трансформации бизнес-процессов розничных компаний в условиях внедрения омниканальной торговли. Очерчены преимущества и риски внедрения омниканальной торговли в деятельность отечественных ритейлеров.*

**Ключевые слова:** торговая сеть; розничная торговля; offline-торговля; online-торговля; омниканальная торговля.

*Рис.: 4. Табл.: 1. Библ.: 15.*

**JEL Classification:** L81

**Problem setting.** Changes on the global market take place by unprecedented pace and to achieve success, retailers should consider speed of these changes. Due to technologies, the retail sector acquired other form and, correspondingly, the approach to products and services sale was changed.

Changes in the consumers' behavior flavor to the development of multi channel, cross-channel sales, e-commerce, mcommerce, fcommerce, scommerce, etc. But at the same time, new paradigm concerning the process of sales that is named "omnichannel retailing" is being created (retail sales through universal channels), essence of which lies in opportunity to buy practically any products notwithstanding place, time and connected device. As it is stressed by specialists, one of the perspective groups are omnichannel consumers, the necessary characteristic of which is active use of the Internet and availability of free funds after satisfying basic requirements. Omnichannel consumers mostly belong to the age group 21-35 years, they are city residents, actively use technologies in all spheres of life and differ by higher level of confidence in own future. In 2015, there were in the world more than

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1.5 billion of such consumers and before 2025 by the predictions, their number will be doubled [1]. As the researches of Deloitte company show, indicators of omnichannel sales in the world increase the offline-sale indicators for 208%, and popularity indicators of omnichannel sales increase the online- sales indicators for more than 93 %. Experts note that retailer presence in online-sales channels stimulate the buyers to increase the costs for 25 % comparing to previously planned ones and increase the loyalty for 75 % [2].

Recent researches of Nielsen company state that in Ukraine, consumers share that buy definite categories of products also increased within the last five years more than twice [3]. As well, the behavior of consumers concerning products search and purchase also changes. That's why, to increase sales amounts by retail companies, it is necessary not only to know own customers, history of their purchases and inquiries, likes, social status, but efficiently use this information on all stages of communication with them, to combine in complex offline and online sales channels and provide integral and comfort consumer experience of purchase by them.

**Analysis of recent researches and publications.** To consideration of separate aspects of the trade enterprises activity, their innovative development, sales channels transforming according to current changes in the consumers' behavior, the works of scientists and practitioners are devoted, among which, the publications of O. Zozuliov, O. Zhegus, M. Mykhailiuk, O. Chorna and others should be noted. At the same time, not fully revealed the issues of introducing in the activity of retail companies multi- and omnichannel sales models which are based on using current information-communicative technologies.

**Defining of not solved before parts of general problem.** New technologies gradually dissolve between offline and online business. All that actualizes the researches concerning analysis of the available experience of retail companies activity that are already active participants of omni channel sales with the purpose of advantages, drawbacks and problems of such sales implementing specifying in the realities of the Ukrainian retail, as well providing for the client single high standard of services notwithstanding exit or entrance points in the process of purchase.

**Objective of the article** is research of the essence of omni channel character in retail, defining the tendencies, problems and perspectives of such sales implementing into the activity of domestic retail companies.

**Statement of the main material.** Within the recent time, considerable changes have taken place in external environment of retail. Main manifestations of these changes are gradual transforming role of shops; wide spread of social networks; rapid development of mobile technologies and their use in the process of goods sale, as well global demographic shifts. If before, in the center of attention of the leading trade networks was their quantitative growth (though, extensive growth is left to be actual direction in the strategies of their development), then, nowadays, as a result of strengthening competitiveness, crisis phenomenon in economy, technologies development, problems of qualitative growth of the networks and creating interrelations with the clients from which stable development of the companies in future depends, became actual.

Experts in retail sphere note that in future, the advantage shall be received by those sales channels that are able to provide unique, consumer-specific brand due to which the buyers shall make next purchases [4].

The term of omnichannel appeared in the Ukrainian retail) relatively recently and sometimes it is combined with multichannel. However, these terms are not similar, though they are directed for creating conveniences for the buyers in the process of products purchase and services providing.

We'd like to note, that multichannel is considered as a strategy of the company development that envisages purchase by the client products or services through different

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channels (offline and online), which don't interrelate between each other. Accordingly, omnichannel is a strategy of the company development that combines different channels of cooperation with the client (web-sites, mobile apps, shops, internet-shops and others), providing support and quality of the service [5]. Thus, omnichannel envisages "seamless" transfer between offline and online communication channels with the client and is a reaction for changes in its likes, requirements to buy and receive necessary information about products/services quickly and in real time ("at any place, at any time") (Figure 1).

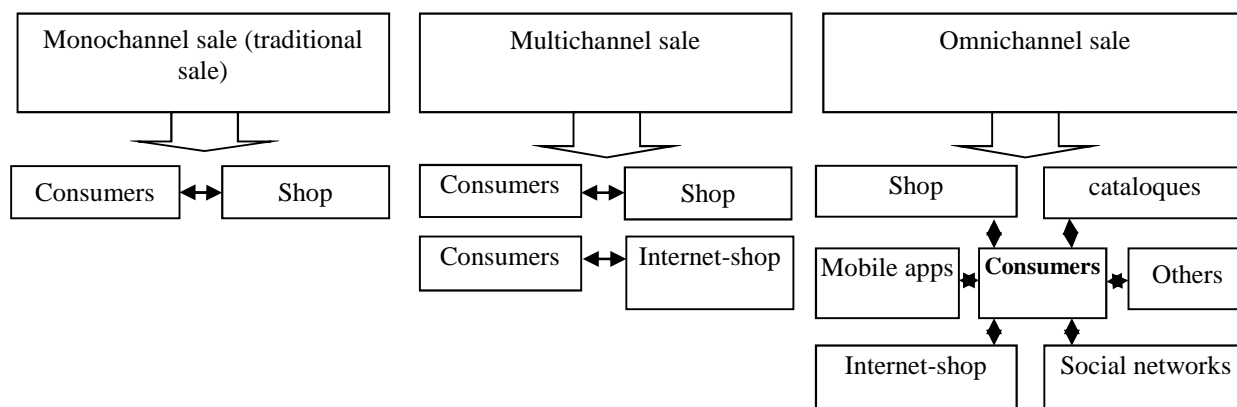


Figure 1. Sales channels by mono-, multi- and omnichannel trade and their interrelation

Source: compiled by the author on the base [5].

Main impetus concerning omnichannel trade development in the world retail are changes that take place by the following directions:

1. Changes in the buyers' behavior. Experts note that global economy entered the phase "Consumer" (figure 2-3).

	Age of manufacturing 1900-1960	Age of distribution 1961-1990	Age of information 1991-2010	Age of the customer 2011 no tenep
Sources of do dominance	Mass manufacturing makes industrial power houses successful	Global connections and transportation systems make distribution key	Connected PCs and supply chains those who control information flow dominate	Empowered buyers demand a new customer
Successful companies	Ford, P&G, Sony	Wal-Mart, Toyota, UPS	Amazon.com, Google, Intuit	Facebook, Apple, Best Bay

Figure 2. Stages of the market development periods concerning the role of the consumer in global economy

Source: [6].

The buyers stopped to act in line and by predictions concerning the choice of the products. Their choice is based on multiple sources of information and consumer experience (search systems, references, blog reviews, clips in YouTube, sites/groups in social networks, mobile apps, rating and etc.) Appear of so-called "mobile (digital)" buyers that spend more, need less consulting from the sellers' side (35% use smartphone instead of consultations); better informed (82% use "search" being inside the shop); more "accessible" (90% use smartphone in the process of preparing for shopping), stipulate using new strategies of retail sales. Characteristic is also that fact that the buyers don't become more loyal to the retailer – 43% of the buyers that use different channels of information search about the product and place of its purchase, by arising the new requirement don't search for necessary products, in first turn, by the retail, by which they bought before [2].

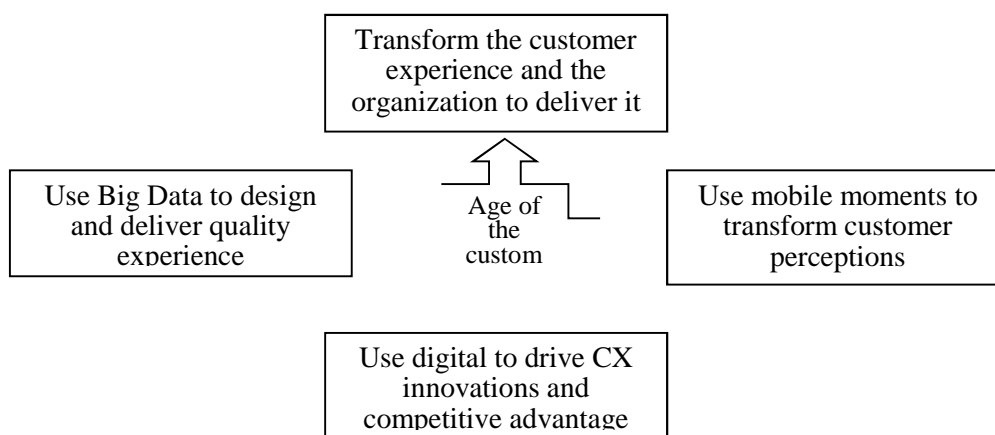


Figure 3. Transformation of the consumer role in global economy

Source: [6].

Accordingly, these changes in the consumer's behavior, its demand stipulate forming more personified and individualized proposition from the side of retailer companies.

2. Within the last years retail competitiveness with other industries in struggle for the consumers' attention, their funds, free time and loyalty became more acute. That is connected with that fact that gradual redistribution of the consumer's costs and its free time in other directions, in particular: for health, education, recreation and other forms of entertainment take place.

As it is known, within the limits of consumer standard survive that is based on purchase of every day consumption goods and services of low price segment, the rules are dictated by the producers and that stipulates strategies of their development and strategies of development of other market participants. Provided the limit increase of survive standards, the households start to choose alternative and priority for them directions of money funds use on their own, as a rule, on the base of responsible consumer choice and investment activity. Due to that, the companies should correct own value propositions and channels of their promotion in accordance with actual directions of using monetary funds by the consumers.

3. Active development of online-trade flavored for competition exacerbating between online and offline channels of retail trade, manifestation of prices damping from the side of offline trade channel. That's why, leading "traditional" retailers stop considering online-trade only as additional trade channel. Herewith, the retailers understand that notwithstanding the increase of online-trade and number of information sources about products, the shop stays to be the most important channel for making decision concerning everyday products purchase. But following technologies development and increasing the number of used online-devices, demands grow by the buyers concerning experience that they receive in the shop, and accordingly, await for retailers decisions that could satisfy their demands and give new impressions. That's why, namely hybrid models of retail trade – multichannel and omnichannel give the retailers essential advantage in conditions of growing struggle for the consumer. So, all that stimulates acquiring new and improving already existing communication channels with the consumer and their combining.

4. Technologies development in sphere of communication with the consumer. Experts point out some important trends that undeniably affect behavior and competitiveness of business. One of them – accelerated development of mobile communication. Between the arise of new smartphones in 1997 and Wi-Fi in 1999, only five years passed before arise of Skype (2003) and Facebook (2004). In 2011 volume of smartphones sale increased the volumes of cell phones sale, in 2015 80% of the users of mobile communication already had

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smartphones, and global mobile traffic in 2015 made more than 17% from the whole Internet-traffic [7].

At the same time, variable software products and apps become cheaper, expanding their capabilities and comfort of use, personalization of communication and information inquiries, likes and emotions of the products consumers can be observed.

Within this aspect, essential influence on changes in sphere of communication with the consumer, business-processes, competitiveness and attractiveness of brands has the development of social networks. Complexity of the technologies of mass communication forms *engagement* of the customers in definite processes, provides possibility for people to communicate with the help of special Internet apps, to create on their base personal content and exchange it. Such communication can accept various forms: the consumers can exchange thoughts, experience, news, video materials, phot, audio files, references to other sites, establish contacts and cooperate with the purpose of organization and conducting common actions increasing emotional acceptance by them individual companies, products and brands. Under such conditions, the trade companies should essentially change own structures of development that might correspond to the expectations of modern “digit” consumer and provide it with unique integral consumer experience (Figure 4).

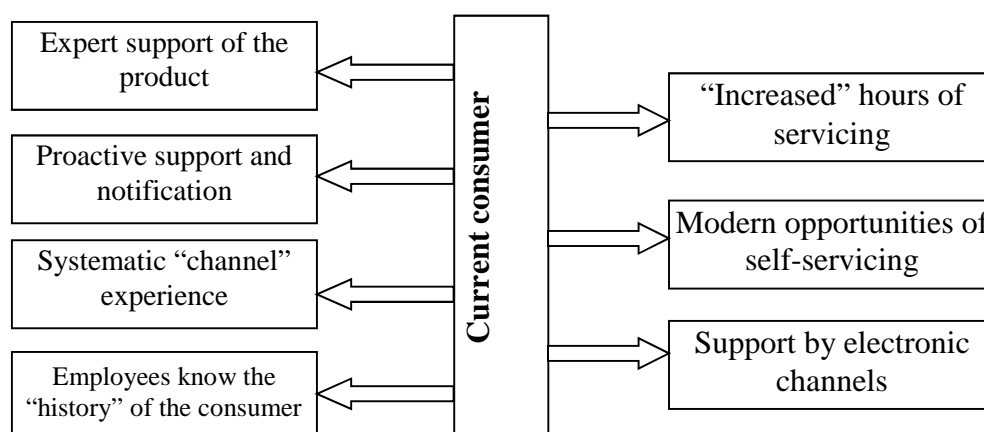


Figure 4. Requirements of current consumer in the process of the products/services purchase

Source: [14].

The Ukrainian retailers notwithstanding falling of effective demand, crisis phenomenon in economy, are gradually involved in the process of own trade channels transformation and world tendencies. Prevailing majority of the domestic retailers at the current stage introduce omnichannel strategy of sale as a response to the active tendency of online-environment in Ukraine. Thus, by the data of Gemius company, as of July 2016, the Internet network in Ukraine out of all types of devices was used at least once a month by 26,2 million of users (from PC or tablet – 18,3 million people, from mobile telephones or smartphones – 6,1 million people, from tablet – 1,8 million people). By evaluations of Factum Group Ukraine, general level of the Internet penetrating in Ukraine in the second quarter of 2016 made 66 % (as of the end of 2015 – 58 %). Accordingly, 67,3% of the Internet-users (more than 12,3 million people) visited sites of the Internet shops and nearly 17% bought something on them [8].

However, the market leaders put as an aim to build active omnichannel strategy of sales in average term perspective (as a sample, “Intertop” company). These changes can be now observed in “premium” segment of the market (market Fashion & Lifestyle) and are gradually extended for other segments of the market (“technological” retail). Speed, with which it takes place, depends on the investments amount that the retailers are ready to contribute, peculiarities of regulatory framework, solvency level and feedback reaction of the consumers

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target groups of retail companies on the implemented processes.

Decision to transfer retail to omnichannel (even to multichannel) should be made after grounded estimation of strategic and operational risks concerning such aspects of the company activity as:

- investments amount into technological infrastructure that supports omnichannel sales, gives opportunity to include additional trade channels and partners;
- definition of organizational, process and technological rules of synchronization between the trade channels;
- approaches forming for pricing in different sale channels (in the ideal omnichannel sale model, the buyer should see various prices in different channels, though the structure and expenditures amount differ in them) and loyalty program.

Such analysis shall allow to define which elements of the omnichannel model should be implemented and from which we should refuse, which sales channels should be used now and which in a definite period of time, because on the expenditures amount for investments, forming competitive preferences, elements of the clients loyalty programs depend (CLP).

Thus, in the process of organizing by the retailers omnichannel trade, main transformations take place in first turn in business processes connected with providing seamless transfer of the clients from one channel to the other within the whole process of the products/services purchase and after sold servicing.

We'd like to focus your attention on the main from them:

1. Omnichannel sales are based on new information technologies, acquiring of all types, cash and mobile applications, current cash equipment, correspondent loyalty programs directed to maximize amenities for the consumer and its satisfaction from the process of purchase on any trade channel that is used by the retailer. That envisages cashes implementing with fiscal register that receives the payment both by plastic cards and SMS-payments; self-servicing with the help of the terminals with the module cash-in, integration of **ERP** and CRM systems with the Internet shop in direction of rests, orders, data about the clients, accrued and spent bonuses within the program of loyalty and others. Mobile technologies acquire special urgency using which, the retailers have the opportunity to establish stable channel of communication with the customer offering it comfort services.

Process approach which lies in the base of omnichannel envisages using same classifies of commodity categories (single description of goods), marketing attributes and merchandizing for all used trade channels.

Experts state that choice of the "place" of performing the purchase is defined by the products category (for example, by purchasing products category with service support and products of long use, the preference is given to online-channel). An though, the majority of purchases is made on offline-channel (more than 82%), "digit" experience of the consumers stipulates changes in the approaches to using trade space that is left to be an epicenter of innovations, receiving of real tactile contact and creating unique experience of the relations between a consumer and brand. As it was shown by the researches of GfK «Global Youth Retail Survey 2015», buyers in the age from 16 to 21 years that were formed in the epoch of digitalization (are so-called "digital natives"), consider that physical trade points under definite conditions can play considerably bigger role in the process of decisions making concerning purchase the products on account of emotions and confidence that they can receive in the shop [9].

Thus, in new "economy of consumer experience", it is important to use emotions of the consumers, adapt trade space for their various demands on account of creating correspondent atmosphere in the shop, integrated of various goods placement that reflects life style. According to omnichannel concept, characteristics of trade space should provide multi functionality of its use to satisfy the variety of experience and preferences by the visitor; high

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throughout capacity and synergy from various types of the consumers activity; flexibility and adeptness to social-economic changes; to take into consideration consumers mobility, provide communication with them and their involvement in the process of purchase by using digital-technologies [5].

2. Changes in the consumers behavior and their loyalty actualize new approaches to use omnichannel marketing and implementing by retail companies programs of customers loyalty (CLP) in the process of development of their omnichannel trade. Qualitative program of loyalty is an important factor that influences on satisfaction and intentions of the clients to go on with the relations with the company. Usually, loyalty is considered as regular purchase and consuming products/services through the system of interrelations with the client that positively influences on operational business indexes [6]. In conditions of traditional conducting retail business, the role of introduced CLP, as a rule, is seen only as promotion of frequency and volume of purchase that does not always form and develop loyalty. Herewith, majority of the programs are created as a response to the competitors' actions and on the base of deep and systematic analysis of behavior and preferences of the target group.

However, omnichannel development envisages creation and establishment of interrelations with the client, support of values offer of the company on the base of the client's study, finding out its peculiarities and demands, establishing with it feedback to improve values propositions and promote cooperation with the company. The consumer receives the opportunity to get all necessary data that influence on the goods choice on one channel, specify them through other channel, purchase by the another one. All that allows to increase loyalty of the buyers to definite trade company and provide their presence within the frames of many channels within one company.

Advantages of omnichannel marketing and omnichannel CLP of the retail company (retailer) lay in forming communication system to show CLP values and differences (differentiation) concerning offers of the competitors; increasing the offers personalization on the base of the results of information-analytical system operation; improving techniques combination concerning interrelation with CLP clients, etc.

3. Development of traditional stationary trade (in first turn, network) stimulated and continues to stimulate strengthening of main logistics, forming of logistic warehouses, while availability of the products on the trade channel and its accelerated delivery with providing high level of service is a basic competitive preference [11, 12]. However, arise of omnichannel sales gradually transforms the link of deliveries, system of its management in view of individual sales channels. Transfer of omnichannels creates new evolution phase of operation logistics transformation. Consumer experience and model of the consumers' behavior in omnichannel sphere act as determinates of complicating logistics management of omnichannel sales from the point of view of integrity and interdependence of separate links in supply channel.

Traditionally, to the factors that influence on the logistic process, the following ones are related: suppliers, frequency and amount of purchases, transportation mode, distribution center, transporting and order of purchases/delivery of the goods. Products delivery to the consumer requires time (1-5 days depending on the distance from destination point), expanses (in cities 5-12 % from the products amount, in rural places – up to 20 % from general amount of order) and using the services from various deliveries services [10]. But, introducing omnichannel model requires solving the number of problems, in particular:

- availability of numerous combinations for goods receiving and its return lead to increase of logistic expenditures;
- stores management and “fulfillment»( complex of operations that is performed by the seller from the moment of producing the order by the buyer until the moment of this order delivery to the buyer) are left to be disintegrated in view of different channels of sales;
- different intensity of consuming on sales channels and weakly formed changes of

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demand in them require increased frequency of deliveries and shortening their amount that also lead to increasing logistic expenditures;

- growth of the clients' demands concerning decreasing the deliveries of products amounts not depending on the distance from the order point to the delivery point of the goods;

- reserve sources are not differentiated by the channels and the process itself of making decisions about reserving is multifactor;

- risks of coordination lack of click-and-connect with the operations of offline-channel of cooperation with 2-3 partners with the purpose to organizes delivery to the region, as well existence of limitations for some categories of the products [11, 12].

Thus, omnichannel model of sales requires considerable changes in business-processes without their implementation, it is not possible to keep the clients in the integrated sales channels (Table 1).

Table 1

*Comparative characteristics of mono,- multi- and omni- channels of sales*

Comparison parameters	Monochannel sale	Multichannel sale	Omnichannel sale
Number of sales channels in the middle of trade company, pcs.	1	2-5	all possible
Interaction level between the channels	low, practically absent	average, in first turn it is connected with pre sale and post sale service	high, all channels in complex are considered as a single system
Pricing	price is established for definite channel; means of payment is established for separate channel	price is determined for each individual channel; very often the price on online-channel is lower in comparison with the offline-channel, means of payment is determined for each individual channel	dynamic pricing; preferably, single system of pricing in all channels that are used; payment by any means on any channel
Assortment	assortment is formed definitely for the channel; considers peculiarities of the local market	assortment can differ depending on the channel; limitations for definite commodity products sale can be established	single assortment in all channels that are used; single classification and description of commodity categories in all channels
The clients loyalty programs (CLP)	are formed and managed by one company; defined for separate channel; CLP are often presented as standard accumulative discount cards	can be created either by one company, or a number of companies-partners; are use either for each separate channel, and for several channel; envisage benefits for using both own and partner products; often, additional bonuses are received through online-channel; often, distinct database about the client and its likes	can be created either by one company and a pool of the companies-partners; single loyalty card active in all channels; single database about the client and its likes; single base of the inquiries database of the client trough various channels; transfer from one communication channel to the other not losing the history of inquiries (context)
Logistics	is determined for definite channel: offline <i>or</i> online. Offline channel – delivery by big batches under traditional methodic of the loads treatment Online channel – products are dispatched not by batches, but in pcs, with correspondent marking, producing inquiry and documents, returning of the (fulfillment). Outsourcing use	chain of deliveries require agreement between the channels and logistic processes offline <i>and</i> online. Outsourcing use	Transformed deliveries chain able to serve all channels of sale with many combinations of goods receiving and its payback; importance of relations establishment that provide transformed chain of deliveries

Source: compiled by the author on database [10-15]



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Thus, transition of the retailers to omnichannel servicing of the consumers leads to such positive effects in their activity as:

- increasing the level of the market covering on behalf of extending the number of channels;
- elaboration of personified CLP on the base of strong database about the clients баз даних про клієнтів (Big Data) with bigger criterium number that are taken to consideration in the process of this offer producing;
- increasing the amount of sale and loyalty because the consumers are often left within the company on account of “seamless” transition among the channels;
- increasing the quality of predicting of the consumers’ behavior on account of establishing closer contact with them;
- speed increasing by entering the new markets on account of using distant trade as one of the sales channels which is used by retail company;
- increasing the company’s knowledge on account of using single marketing tools in all sales channels;
- costs minimization on account of receiving synergy of operative management of the company.

However, investment and market risks grow which are connected with the following: necessity in additional investments in innovative system of sales; introducing of new information products that allow in the mode of active time receive data about purchase on different sales channels and their synchronization; necessary re-equipping of trade objects that are included in the retail company and infrastructure modernization that provides “seamless” transaction between the channels; transformation of the logistic system including deliveries chain with the purpose of the deliveries optimization on any sales channel of the retail company; involving new qualified specialists and measures conducting on training and re-training of the qualified staff.

**Conclusions and offers.** Omnichannel is a strategy that is based on deep knowledge about own buyers which requires restructuration of existing business-processes, implementing information and innovative technological processes. Experience of the western retail companies states that omnichannel influences positively on increasing demand amount, achieving financial purposes of the companies, creating additional amenities for the buyers.

Specific of economic situation in Ukraine defines general situation in retail and influences on the strategies that are used by the retail companies in the process of their operative activity and in relations with the clients. On this stage, the retailers preferably concentrate themselves on providing the efficiency of own activity provided falling the competitive demand. However, domestic retailers continue optimizing business-process in searching new methods of the products sale, gradually come to using multichannel solutions, and the leading companies – to omnichannel model, though its level of penetrating into the market is not strong. Changes that take place in external environment of the retailers activity are quite significant to ignore them and act by traditional methods. It is predicted that provided improvement of general economic situation in Ukraine, strengthening competitiveness among professional retailers, development of domestic retailing in direction of omnichannel will be accelerated and will be performed in context of the world trends.

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