

Contents

1	From Stationary Retail to Intelligent Retail	1
1.1	Status of Stationary Retailing in the Wheel of Retailing	1
1.2	Online Versus Offline and Food Versus Non-food	6
1.3	Stationary Retail Before, During and After Corona.	9
1.4	Structures and Size Classes of the Stationary Retail Trade	12
1.5	Location Development City Centre Versus Shopping Centre	14
1.6	Intelligent Retail Instead of Residence Principle.	17
2	Threat to Stationary Trade	21
2.1	Shift from Offline to Online.	22
2.1.1	Systemic Relevance of Online Trade	22
2.1.2	Frequency Losses in Stationary Trade	25
2.1.3	Erosion of Inner Cities.	27
2.1.4	Effects on Shopping Centres and Greenfield Sites	31
2.1.5	Dominance of Online Marketing.	34
2.2	Digitalisation of Consumer Behaviour and Customer Expectations	37
2.2.1	Total Penetration of Internet Use	38
2.2.2	Changing Customer Expectations Through Amazonization	39
2.2.3	Increasing ROPO Effects for Stationary Purchases.	41
2.2.4	Showrooming Versus Webrooming in Stationary Retailing.	43
2.2.5	SoLoMo as a Key Issue for Stationary Formats	46
2.3	Scenario for the Internationalisation of Retail Trade.	48
2.3.1	International Players in German Online Retailing.	49
2.3.2	Internationalisation of Stationary Trade.	51
2.3.3	Cross Border Commerce	52
2.3.4	GAFA-TAB Economy and Hidden Champions.	54
2.3.5	New Social Commerce	56
2.4	Changing Value Chains and Loss of Customer Relationships.	57
2.4.1	Importance of Portals and Shopping Platforms.	57
2.4.2	Change in Value-Added Structures	59
2.4.3	Verticalisation Versus Specialisation	62

2.4.4	From Point of Sale to Point of Decision	64
2.4.5	Increasing Importance of Data-Based Performance Marketing. ...	66
2.5	Change of Experience Orientation and Service	68
2.5.1	New Disruptive Factors for Customers	69
2.5.2	From Experience Trade to Retailtainment	70
2.5.3	Role Change of Personal Counselling	72
2.5.4	Location-Based Services	75
2.5.5	Digital Services and Services	77
2.6	Refusal of Digital Transformation	79
2.6.1	Hardly Any Digital Jolt in Germany	80
2.6.2	Digital Resistance in the Retail Sector	81
2.6.3	Risk Averse and Visionless Standard Digitisation	83
2.6.4	Lack of a Digital Strategy	85
2.6.5	Slow Digital Adoption and Transformation	88
2.7	Change of Use of City Centres	91
2.7.1	Critical Size: Major Centres Versus Small and Medium Cities. ...	92
2.7.2	Changing Roles: Sleeping City Versus Shopping City	95
2.7.3	Retail Real Estate: Polarisation and Trading Down	97
2.7.4	Overstretched Local Politics: Lack of Ideas and Concepts	99
2.7.5	Lack of Initiative: Not Everyone on Board Including Landlords ..	102
2.8	Customer Centricity Misunderstood as a Business Principle	106
3	Intelligent Retail	109
3.1	Basic Requirements for Intelligent Retail	110
3.1.1	Intelligent Situation Assessment: Digital Evolution Stage	110
3.1.2	Digital Leadership	114
3.1.3	Digital Culture: Digital Culture Fit	117
3.1.4	Digital Organisational Requirements	119
3.1.5	System Technical Requirements: API First	121
3.2	Intelligent and Customer Data-Based One-to-One Marketing	125
3.2.1	AI Versus Machine Learning in the Retail Sector	125
3.2.2	Intelligent One-to-One Marketing and Hyperpersonalization	130
3.2.3	Intelligent Assortment and Sales Planning	132
3.2.4	Intelligent Pricing in the Retail Sector	135
3.2.5	Intelligent Communication and Customer Services in the Retail Sector	137
3.3	Smart Stores and Channel Linking	140
3.3.1	Online Versus Offline and Onsite Versus Offsite Options	140
3.3.2	Multi-Channeling Versus Omni-Channeling Options	145
3.3.3	Web-to-Store and Store-to-Web Digitisation	153
3.3.4	Digital-in-Store and Web-in-Store Digitisation	162
3.3.5	Smart Stores and Smart Business Models as a Freestyle	176

3.4	Intelligent Supply Chain	181
3.4.1	Customer-Centric Supply Chain and Quick Response	181
3.4.2	Two-Sided Supply Chain as Ecosystem.....	185
3.4.3	Use and Potential of AI in the Supply Chain.....	187
3.4.4	Self-Learning Supply Chain	188
3.4.5	Blockchain Technology in the Supply Chain.....	191
3.5	Intelligent Employee Qualification and Recruitment	193
3.5.1	Addressing the Skills Shortage in the Retail Sector	194
3.5.2	Repositioning of the “Retail” Employer Brand.....	195
3.5.3	New Digital Attractiveness as an Employer.....	198
3.5.4	Personnel Sourcing and Employee Loyalty.....	201
3.5.5	Strategies for the “War for IT Talents” in the Retail Sector.....	203
3.6	Intelligent Online Marketplace Sales.....	205
3.6.1	Online Marketplaces Versus Platforms	206
3.6.2	Own Online Marketplace Versus Selling on External Marketplaces	209
3.6.3	Online Marketplace Forms and Their Market Significance.....	215
3.6.4	Regional and Local Online Marketplaces	218
3.6.5	SaaS-Enabled Marketplaces (SEM).....	222
3.7	Channel Egal and Connected Retail as the Highest Stage of Evolution ...	225
4	Examples for the Stationary Retail Trade of the Future	231
4.1	Future Formats of the Stationary Retail Trade.....	232
4.1.1	Future Specialist and Supermarkets: The Example of Hema/ Alibaba.....	232
4.1.2	Showroom Stores: The Example of b8ta and Vaund	234
4.1.3	D2C Mono-Label Stores: The Example of Warby Parker and Nike	237
4.1.4	Online Retailer Stores: The Example of Amazon and JD.com	242
4.1.5	Efficient Transparent Stores: The Example of Everlane and Glossier	247
4.2	Machine Learning in Stationary Retail: Project Example ON4OFF	250
4.2.1	ON4OFF Initial Situation, AI Problem and Project Consortium... ..	250
4.2.2	ON4OFF Project Content, AI Applications and AI Innovations ...	253
4.2.3	Technical AI Concept and ON4OFF Reference Model.....	257
4.2.4	ON4OFF Work Packages and Project Phases	260
4.2.5	ON4OFF Milestone Planning and Overall Objective	264
4.3	Retail Digitization Projects: Lessons Learned.....	267
4.3.1	Project MG.Retail2020 to Strengthen Stationary Retail Trade	267
4.3.2	Mönchengladbach on eBay	276
4.3.3	Digital City Centre as an Initiative of HDE and eBay.....	280

4.3.4	Diepholz on eBay.	283
4.3.5	OCW/Online City Wuppertal and Atalanda.	285
4.4	Digital Retail Initiatives and Promotion	288
4.4.1	eBay City Initiative and eBay Your City	288
4.4.2	HDE-Google-Initiative Future Trade.	290
4.4.3	Amazon SME Impact.	292
4.4.4	State Support for SME Digital and Digital Coaches	294
4.4.5	Digital Erfa and Self-Help Groups	295
4.5	Smart City of the Future	298
4.5.1	Smart City Concept	299
4.5.2	Digital Governance and Smart City Index.	302
4.5.3	Intelligent Mobility and Traffic Management	304
4.5.4	Urban Logistics of the Future	307
4.5.5	Future Project “Vital City Centre”.	312
4.6	Intelligent Shopping Centers of the Future	314
4.6.1	Customer Journey in Shopping Centers.	315
4.6.2	Revitalisation of Shopping Centres	317
4.6.3	Evolution of Shopping Centres into Service and Lifestyle Hubs . .	320
4.6.4	Digitisation of Shopping Centres.	324
4.6.5	Shopping Centres as City Centres: The Example of Bad Münstereifel.	326
4.7	Metropolises of the Future.	328
5	Risks for Intelligent Retail	331
5.1	Legal Risks in Distance Selling.	331
5.2	DSGVO: Basic Data Protection Regulation	334
5.3	Geoblocking Regulation	337
5.4	Silo Controlling Instead of Network Management	339
5.5	Myths and Prejudices.	341
	References	345