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Newsletter for Instructors

COMMENTS?
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This newsletter provides teaching tips and summarizes article abstracts for case discussions for the following topics:

- **Target's Answer to Discounters Is an Even Cheaper Store Brand (Chapters 2, 5 & 12)**
- **A Glut of Used Hogs Is a Drag on Harley-Davidson (Chapters 5 & 13)**
- **Is Apparel Manufacturing Coming Back to America? (Chapter 9)**
- **Will Amazon Disrupt Retail Again with Its New 4-Star Concept? (Chapter 11)**
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Teaching Tips

Additional Material for Teaching Retail Classes

A website, part of the University of Florida Miller Center for Retailing Education and Research, provides materials for retail class instructors including:

- Nine syllabi from instructors
- Classroom exercises
- Team projects
- PowerPoint slides
- Copies of this newsletter and previous issues
- List of retail links, cases and videos

The website is available at **http://warrington.ufl.edu/centers/retailcenter/teach/**

Please consider sharing your materials with other instructors through this website by sending your course syllabi, classroom exercises, projects, teaching types, etc. to **bart.weitz@warrington.ufl.edu** or **mlevy@babson.edu**

Target's Answer to Discounters Is an Even Cheaper Store Brand

Khadeeja Safdar, The Wall Street Journal, October 6, 2018; see also George Anderson, "Will a New Private Label Keep Target's Customers out of Aldi and Dollar General?" Retail Wire, October 8, 2018

Use with Chapter 2, "Types of Retailers," Chapter 5, "Retail Market Strategy," and Chapter 12, "Buying Merchandise"

Store brands provide a unique means for retailers to signal their identity and strategy. Target's most recent initiative in this realm highlights its desire to appeal to all shoppers, by ensuring that its pricing strategy is comprehensive.

The new Smartly line of products will feature household necessities, packaged simply and often in single-serving portions, at prices that average about 70 percent less than comparable national brands. By listing most of the items at less than $2, Target is aiming to appeal to budget-conscious consumers who care little about brands.

The move stems from a notable shift in Target's strategy though. In the past, it rarely tried to compete on price; even its existing private label, Up & Up, cost about the same as national brands. But in recent years, hemmed in by competition from Walmart and Amazon, as well as price pressures resulting from the growth of discounters such as Aldi and Dollar General, Target changed its tune. The CEO officially announced that the retailer would minimize its emphasis on profits so that it could charge lower prices across the board. Smartly is a key added component of that strategic effort.

It joins several other private-label brands in other product categories, such as Target's Heyday electronics, that also are priced below the national brand average level. With these exclusive lines, Target hopes to maintain its appeal for shoppers who visit its stores precisely for the unique offerings, not just for the prices. That is, it wants to appeal to brand-focused shoppers who want the latest limited edition line available only at Target, but it also wants to get brand-agnostic consumers needing the lowest price through its doors or onto its website.

A key demographic in these efforts is millennials, who generally are price conscious and might need a single roll of toilet paper for their first apartments. These shoppers also tend to care little about branding, so the Smartly packaging wastes little effort with fancy displays and instead simply describes the product's primary function (e.g., "Paper Towels—Cleans Up Your Messes").

Yet the expansion of its offerings—Target currently has added or announced plans to include more than 20 separate store brands across various product categories—may be a challenge for store operations. Target will be faced with a choice and must determine whether to grant limited shelf space to popular national brands, its familiar Up & Up private label, or the exciting new (and price-oriented) store brands. Target's strategy at this point is a plan to remove the worst performing items from each line.

Another option though is to move more customers online. For this related effort, Target is hyping its Restock program, which allows online shoppers to fill a box with a range of products and have it shipped to them, for a single, flat fee. If they also maintain a Target Redcard credit account, they can have the essentials shipped to them the next day, while earning even greater discounts on their purchases. Thus if Target can get all these elements of its strategy to work cohesively, it might hit the mark for a wide range of shoppers, ensuring their satisfaction and loyalty over time.

Discussion Questions:

1. **What type of store is Target, and with what types of stores is the new Smartly line designed to compete? Which specific stores?**
2. **What type of growth strategy is Target employing in introducing its new Smartly line?**
3. **What are the advantages and disadvantages of adding the new Smartly line to its existing product offering?**
4. **How will Target make room for Smartly products in its stores?**

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A Glut of Used Hogs Is a Drag on Harley-Davidson

Bob Tita, The Wall Street Journal, October 1, 2018

Use with Chapter 5, "Retail Market Strategy," and Chapter 13, "Retail Pricing"

Imagine a vastly popular product, offering excellent quality, for which people happily pay tens of thousands of dollars, while also willingly purchasing accessories and related equipment, all emblazoned with the brand logo. It sounds like a marketing dream. But for Harley-Davidson, the great ride it has enjoyed for decades, as a result of these superb conditions, is creating some new roadblocks for its retail dealerships. In particular, no one is buying new Hogs anymore.

Priced at $18,000–$25,000, a new Harley motorcycle is a serious investment. At this price point, consumers expect the bikes to be well made too, so a well-maintained Harley can last for decades. That means many riders hold on to their first purchase. For others, even if they decide to make a trade, a used Hog is a great option, because it retails at about half the price, but often has thousands of miles of use still in its tank.

The price points also define the target market. To spend $25,000 on a vehicle that is mostly recreational and likely secondary to a more practical car or truck, the buyer needs substantial disposable income. For Harley, the Baby Boomer generation was an ideal target: They had money to spend, and they loved the idea of embracing their inner rebel by riding down the road with the wind in their face. As that generation ages though, fewer consumers are willing and able to handle a massive motorcycle.

The younger generations to which Harley might turn its attention feel less nostalgia for the image of an "Easy Rider," and they generally have less disposable income than their parents did. Thus if they are interested in a Harley at all, they too are likely to go for a used model, enabling them to attain some of the fun at a lower price.In response, Harley-Davidson is expanding its product lines, seeking to establish more introductory, lighter bikes alongside its well-known, massive Hogs. It is adding sport-style motorcycles, as well as hybrid models that can handle both paved and unpaved surfaces. Harley also has plans to introduce its first electric-powered motorcycle.

Even if they are not going to be riding a Harley though, the company wants to appeal to consumers, such that it is also moving more of its branded clothing and accessories to Amazon. This expansion is a significant change; previously, it only sold branded items through its own stores and dealerships or its website. For dealerships, the challenges are a little different. They worry that the move into Amazon will reduce their foot traffic; many fans stop by to grab a baseball cap, and during that visit, the dealership likely can gather information to be able to contact that same fan later, in the hopes of making a bigger sale. In addition, the glut of used vehicles puts strain on the dealerships' inventory processes, so their goal is to sell as many of the used bikes as possible, rather than adding new products to their showrooms.

Overall though, whether taking the company's perspective or the view of its dealerships, if young consumers do not start embracing the appeal of riding a Hog, where the sales go will matter less than if there are any sales at all.

Discussion Question:

1. **How does Harley-Davidson segment its market based on price sensitivity?**
2. **How does the glut of used Harleys affect the parent company? Its owner-operated dealerships?**

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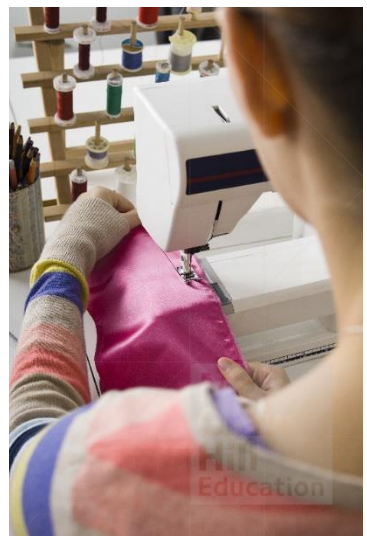
Is Apparel Manufacturing Coming Back to America?

Tom Ryan, Retail Wire, October 19, 2018.

Use with Chapter 9, "Information Systems and Supply Chain Management"

Many of the trends that led manufacturers to move most of their production facilities to various locations around the world are changing, meaning that the structures of their supply chains are undergoing notable shifts as well. There are three main trends emerging in the modern, global, political and economic arena that are leading some analysts to suggest that especially in the apparel industry, we might be entering an era of nearshoring, with far more factories in the United States than there have been in the past.

First, production cycle times have gotten much shorter, meaning that consumers and retailers want to have the latest clothing in stock within just a few weeks, rather than waiting months for a new fashion season. For companies that produce their garments in Asia for example, the transportation constraints make it more difficult to get items where they need to be at a nearly immediate pace. If a clothing company can respond promptly to the latest Instagram influencer's recommendation about a hot fashion trend, because it has nearshored its factory and located it close to where that influencer's followers live, it can better meet their needs.



Second, a prime reason for locating factories in various countries has long been the low labor costs. In less developed economies, companies could produce their products with vast numbers of workers, whose wages were substantially lower than what they would have had to pay in more developed nations. But in the modern global economy, that long-standing assumption is changing, especially in quickly developing countries such as China. Chinese workers' wages are rising quickly, reducing the cost benefits of moving manufacturing capacities there. Relatedly, some of the cost benefits of outsourcing such projects also might diminish with the new and shifting tariffs imposed by the United States on imported goods, further diminishing the cost advantages.

Third, whereas many countries have developed strong manufacturing capabilities, with substantial factory capacity, technological advances promise to make such capabilities less important. For example, if an apparel manufacturer can rely on a farm of 3D printers to churn out hair accessories or fashion jewelry quickly, it has little need for the extensive manufacturing infrastructure that places like China have built.

These trends do not apply to every industry sector of course; it is unlikely that the United States will ever depend strongly on manufacturing as a basis for its economy. But as broader societal and economic changes come to bear, consumers might find far more of their favorite clothing items bearing a "Made in USA" label.

Discussion Questions:

1. **What is nearshoring, and why is it expected to increase in the apparel industry?**
2. **What is the relationship between nearshoring and just-in-time (quick response) inventory systems?**

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Will Amazon Disrupt Retail Again with Its New 4-Star Concept?

George Anderson, Retail Wire, September 77, 2018

Use with Chapter 11, "Managing the Merchandise Planning Process"

In expanding its omnichannel strategy, Amazon keeps experimenting with various iterations of brick-and-mortar locations, testing out grocery concepts, book stores, and cashless sites. Another new option, currently available only in New York City, seeks to make use of one of the key features that distinguishes Amazon from other retailers—that is, its vast treasure trove of consumer reviews. At Amazon 4-Star, the only products carried are those that have earned at least a 4-star rating on the ecommerce site.

Along with this baseline guarantee, the store provides excepts from example reviews, detailing what made the product appealing. Thus Amazon can leverage the massive amounts of data that customers freely provide it, in writing their reviews, to encourage other shoppers to consider well-rated and popular items. It is using these data precisely too, such that the products appearing in the SoHo shop are specifically popular with customers who live nearby, so that there is a localization element.

Yet this experiment is a unique approach to assortment decisions. The assortment reflects the wide range that Amazon is known for, spanning books and gadgets to home goods and kitchen utensils. With this approach, it can also define the merchandise categories in a novel way. That is, the store is organized not by product lines (e.g., all books in one location) or usage situations (e.g., everything for a kitchen placed together) but by categories that Amazon has defined from its customer data, such as Trending Around NYC, Most Wished For, and Amazon Exclusives—including of course selections of its Fire and Echo devices.

The pricing strategy also reflects Amazon's omnichannel approach, in that shoppers in the store encounter different prices for Prime members versus non-members, just as they would on the ecommerce site. The promise of free shipping may be less relevant for these in-store shoppers, but they can still obtain a lower price by signing up for a Prime membership.

Discussion Question:

1. **What is the assortment strategy for the new Amazon 4-Star store?**
3. **Do you believe this concept store will be a success? Why or why not?**

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Sears Seeks to Repair Fraying Supply Chain in Bankruptcy

Jennifer Smith, The Wall Street Journal, October 15, 2018; see also Kimberly Chin, "Sears Expands Kenmore, Die Hard Brands with Licensing Deals," The Wall Street Journal, November 1, 2018.

Use with Chapter 9, "Information Systems and Supply Chain Management," and Chapter 13, "Buying Merchandise"

What happens when one member of a vast supply chain gets in trouble? Do the other members respond with assistance and enhanced support, or do they pull back to protect their own interests? The answer depends on the supply chain of course, but Sears is finding that its supply chain partners, worried that the retailer's troubles are going to lead to its closing, are no longer willing to put themselves at risk to help it.

Notably, when Sears sought and received Chapter 11 bankruptcy protection, representatives of multiple levels in its supply chain reacted by starting to cut ties with it. Various suppliers indicated they would no longer ship products to Sears, out of concerns that the inventory ultimately would sit idle in stores, unpurchased and unpaid for by the retailer. At the same time, logistics and transportation service providers insisted on immediate payment before they would deliver any products from the suppliers still willing to send merchandise to Sears. Other service providers, such as the companies that ensure its warehouse machinery is in good working order, similarly have threatened to halt their efforts if they do not receive payment for existing and ongoing invoices.

In filing a request to use some of the funds allocated for its bankruptcy-induced reorganization to pay these vendors and service providers, Sears made its dependence on its supply chain partners clear. In an earnest plea, it noted that its "Failure to continue sourcing inventory through its existing network of vendors on commercially reasonable terms could have catastrophic consequences for the Company."

Sears appears to hope that these earnest efforts and at least partial payment will keep the supply lines flowing, so that it can continue to sell products and earn revenue even as it reorganizes. However, past examples indicate that even that might not be enough. Toys 'R Us was able to convince toy manufacturers to keep its shelves stocked for the critical holiday shopping season, but even with sufficient stock, within just a few months of its busiest time, it had announced it was closing all its stores.

Yet the current bankruptcy plan continues to take a cautiously optimistic view. Sears has entered into several new licensing deals, to expand the product lines that carry its well-known Kenmore and Die Hard brands. In these cases, new suppliers clearly are willing to initiate a new project with the retailer, even while its bankruptcy proceedings continue.

Sears believes that if it can close underperforming stores, enhance its performance in other stores, and shore up the strength of its supply chain, it can emerge from the proceedings ready to compete. The question that remains is whether its partners are willing to put themselves at risk to help it get there.

Discussion Questions:

1. **What's going on at Sears?**
2. **Should vendors and service providers continue to supply Sears, or should they pull back to avoid greater damage, if the retailer ultimately closes?**

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How Robots and Drones Will Change Retail Forever

Christopher Mims, The Wall Street Journal, October 15, 2018; see also Erica E. Phillips, "Alexa Heads to the Warehouse," The Wall Street Journal, October 8, 2018

Use with Chapter 9, "Information Systems and Supply Chain Management," and Chapter 15, "Human Resources and Managing the Stor e"

Grasping and placing. Those are two rather basic tasks for humans, who constantly and unthinkingly pick up items and move them elsewhere. But they are remarkably challenging tasks for robots, such that for now, the technological advances that are transforming warehouses into vast spaces filled with robotic equipment still cannot quite eliminate human helpers from their floors altogether. But that does appear to be the goal. Cutting-edge robotic and artificial intelligence (AI) technologies being developed, implemented, and used by companies such as Amazon, Ocado, Netflix, and Walmart promise that in the near future, the delivery process will require no human intervention. Let's consider both the current state of affairs and the likely future conditions.

Today, leading companies such as Amazon have already invested heavily in automating much of their supply chain. Robots in Amazon warehouses perform incredibly sophisticated operations. Some robots keep track of where millions of individual items are located in the vast warehouses, then others scurry down the length of the warehouse to obtain the needed product and deliver it to the packaging line. At this point, a human is needed, to pluck the item from the bin carried by this robot and put it into a box. But a robot helps in this step too, indicating which box size is most efficient and taping the box shut.

Ocado, a British online grocer, has similarly impressive warehouses, in which the complex systems suck selected products from their storage bins into robots' housing, then move them onto conveyor belts that terminate with a human packer. But in addition to robotics, Ocado relies heavily on AI to optimize its operations. Algorithms specify where to store each product, how to pack them in bags, which delivery trucks to use and what route they should take, and so forth. Noting that some best practices can conflict (e.g., loading a truck more quickly might mean a less efficient use of its space), Ocado keeps reapplying its AI to its operations to get them better and better—and those operations already are good enough that it can deliver groceries to individual consumers' doors for about the same price as brick-and-mortar grocers charge to customers who visit them in stores. Nor are the existing innovations limited to consumer goods. Workers in some warehouses can now simply call out their needs, such as printing a shipping label, and a voice-enabled assistant, using the same technology as in-home Alexa devices, will perform the task. Rather than having to stop and check the shipping rates, employees can keep working, while the digital assistant takes care of the details.

In all these cases then, there are still roles for human workers—grasping, placing, and overseeing the operations. But according to one robotics expert, the technology needed to completely replace workers in warehouses is about five years from being operational. Although Amazon insists that it wants to maintain or even increase its employment ranks (and has hired more people to facilitate its warehouse operations in recent years), other firms such as JD.com have admitted that their goal is a completely automated warehouse and delivery system.

Outside the warehouse, delivery operations also promise to grow more automated, as driverless vehicles inch closer and closer to reality. Some experiments with drone delivery have taken place in remote locations, but considering federal regulations and safety considerations, deliveries to most U.S. consumers likely will involve wheeled vehicles, rather than flying drones. These innovations are continuing apace; Mercedes-Benz has created a chassis that looks something like a big skateboard that could be changed out and used to support a variety of bodies, from massive trailers to busses to mobile homes.

Furthermore, patent applications suggest that a lot of companies think that the limitations on drone deliveries will be resolved eventually. Both Walmart and Amazon have proposed ideas for a delivery blimp, which would hover nearby and deliver products, literally dropping them from the sky (though in a controlled manner, of course). And IBM wants to patent a drone that can deliver a single cup of coffee to a customer walking down the street. With these potential functions, the robots can do far more than a human worker ever could. Are grasping and placing still so critical in such a future?

Discussion Question:

1. **What tasks have robots and drones usurped from humans working in retail supply chains?**
2. **What tasks do humans still have to do in retail supply chains?**
3. **From a societal perspective, how do you feel about replacing humans with machines?**

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The Transformational Bliss of Borrowing Your Office Clothes

Sheila Marikar, The New York Times, October 12, 2018; see also Alexandra Schwartz, "Rent the Runway Wants to Lend You Your Look," The New Yorker, October 22, 2018

Use with Chapter 5, "Retail Market Strategy"

A retailer that provides shoppers with customers is firmly on the product side of a dual-offering model that contrasts products and services, right? Well, not for Rent the Runway, an omnichannel retail firm that has grown in size, revenue, and popularity mainly by providing a service that many professional women find invaluable. It was originally conceived of as a source of couture options for people who were attending one-time, fancy affairs, like a formal ball or wedding. These shoppers were unwilling to pay astronomical prices to purchase a high-end, designer dress for a single occasion, but they wanted something gorgeous to wear. As more consumers became familiar with this service though, they also started asking Rent the Runway for other options, including everyday outfits that they could wear to the office.

Regardless of where they wear the clothing, the motives are similar: Working women feel strong societal pressures to dress fashionably, stylishly, and flatteringly. The range of options and demands they confront are far more pressing than those that their male counterparts consider, such that professional women have long found that they needed to devote more resources—financial and cognitive—to figuring out what to wear. For women who might be having children, the struggle is particularly acute; they previously might have felt compelled to buy not just a new maternity wardrobe but also further sets of options for each step they took after giving birth and slowly returning to their previous physique. Such demands were not just expensive but ultimately unsustainable. Exhausted by the ongoing process, professional women asked Rent the Runway to come up with a solution that would help them avoid it.

And thus the Unlimited subscription service was born. Rent the Runway allows subscribers to pay $159 per month to receive an unlimited rotation of four items at a time. They can wear a dress once, then return it and receive the next option on their list. Or they can keep that dress for several occasions, then return it later, after they've grown tired of it. Alternatively, if they love it, they can purchase the item, usually at about half the price it would have required in a conventional retail setting.

In this sense, the model evokes Netflix's early days, when it shipped DVDs to consumer subscribers. But unlike Netflix, the products being provided by Rent the Runway are tactile objects that come in close, personal contact with the wearers' bodies. Therefore, another key element of Rent the Runway's service is the cleaning process it provides, guaranteeing customers that the items they receive are clean, sanitized, and in good condition. In support of that provision, it maintains what it claims is the largest dry cleaning operation in the world, a 250,000-square foot facility in New Jersey. It also plans to open another massive dry cleaning facility in Dallas, Tex., to ensure it is promptly serving the needs of consumers in the western United States.

Also similar to Netflix though, the Rent the Runway selection process can create challenges for indecisive consumers. People describe scrolling through the mobile site endlessly, unsure of which item to select. In addition, it continues to confront the inherent problem of delivered clothing, in that there is always the risk that a pair of pants that looks like the right size simply does not fit. Rent the Runway tries to limit this risk by soliciting and posting vast numbers of reviews from users, describing the fit of each item.

Thus far, Rent the Runway has not expanded into men's clothing, though it receives some requests along those lines, especially as the clothing options for professional men extend beyond conventional suit-and-tie combinations. But thus far, the company remains dedicated to the notion that if it can provide a service that helps women devote more of their time, energy, and attention to important matters, rather than deciding what to wear, it can remain a valuable part of their daily lives.

Discussion Questions:

1. **Which growth strategy is Rent the Runway using for its office clothing line?**
2. **Conduct a SWOT analysis for Rent the Runway's office clothing line.**

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Retail Tidbits

LabCorp Deal Brings Blood Testing to Walgreens' Pharmacies

Matthew Stern, Retail Wire, October 18, 2018

Use with Chapter 5, "Retail Market Strategy," and Chapter 17, "Customer Service"

The battle for drugstore consumers is really heating up, as various chains add new and innovative services and products to their stores. The latest effort comes from Walgreens, which has entered into a collaboration with LabCorp testing services to offer various blood tests in stores. Thus shoppers can pick up their prescriptions, grab a candy bar, and stock up on a few essentials, but they also can test their glucose levels and blood pressure, all in one trip. Competitive chains have announced similar initiatives; for example, CVS is expanding its MinuteClinics, due to its recent purchase of Aetna health insurance, which will give it access to more health-related service options it can install in stores. Even beyond these direct competitors, grocers and other retail formats are adding more health-related services. In some Publix stores for example, kiosks allow shoppers suffering from minor health concerns to enter into live video chats with health professionals, who can help diagnose their problem, then point them to the aisle where they can find the optimal remedy. For Walgreens though, the goal is to create distinction from these general offerings, by adding advanced testing capabilities that normally would require people to visit a dedicated testing facility.

Walmart and Advance Auto Parts Join Forces Online

George Anderson, Retail Wire, October 16, 2018.

Use with Chapter 12, "Buying Merchandise"

Walmart wants to make a little of everything available for everyone. Continuing its trend of featuring dedicated, virtually separated stores on its website, Walmart has now established a devoted auto parts section, in collaboration with the specialty retailer Advance Auto Parts. But beyond just hosting auto repair products on Walmart.com, the deal involves an extended strategic partnership. Product offerings will be consistent across Advance Auto Parts stores, Walmart store shelves, and walmart.com. In addition, customers can receive same-day delivery from either retailer, depending on which is more efficient. They also can sign up to have the parts they order installed in their cars. Thus Advance Auto Parts can sell its products in a much wider range of channels and stores, Walmart gets access to a broader and more specialized range of products to offer its shoppers, and consumers gain convenience and easy servicing—promises that are particularly valuable to busy people. Now they can find out what that check engine light means, and fix it, at the same time as they make their regular Walmart run.

A Tab Based on Trust? I'll Drink to That

Anne Kadet, The Wall Street Journal, September 25, 2018

Use with Chapter 5, "Retail Market Strategy," and Chapter 15, "Human Resources and Managing the Store"

Several of the greatest retail challenges—dealing with theft, finding good employees—might be addressed by one philosophical concept: the honor system. In a small store in New York City for example, the high-end beverage company Dirty Lemon Beverages invites shoppers to enter, take a bottle of soda, and then text their payment information to a contact number posted on the wall. No employees are there, whether to answer questions or take payment; the entire transaction takes place through mobile devices. The sodas, with a price of about $10 for a 16-ounce bottle, are expensive, but even if a few dishonorable people walk out without paying, the losses would not be too damaging. Furthermore, evidence indicates that most consumers adopt the principles of the honor system, whether they drop cash in a lockbox to pay for produce from an unstaffed farmers' market or swipe a card to pay for snacks from a cart located in a modern coworking space. Some reports indicate that an average of 93 percent of people pay up, even when there is no one watching to make sure they do not steal. Even if the retailers do not need employees to stop consumers from stealing though, they still might want them around, to help shoppers, gather information, and establish a personal connection.

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