DOI: 10.34680/BENEFICIUM.2021.4(41).23-29
УДК 339.37:338.124.4:004.9
JEL L81, M15



ORIGINAL PAPER

# ANTI-CRISIS STRATEGIES OF THE DIGITAL RETAIL SERVICES MARKET DEVELOPMENT

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**Abstract.** Retail services market, which is built into the weekly cycle of human life and provides goods in the B2C market, is one of the most promising and significant market segments. Digital technologies development, national economy model transformation and the entry of those actively exploring digital space into the able-bodied category of the population require the behavior patterns to be reconsidered by the business community. The past 2020 has become a catalyst of the digital technologies introduction. Within the framework of this study, the authors are interested in studying the transformation of the digital retail services market, considering the economy crisis and changes in consumer behavior caused by the COVID-19 pandemic. The research purpose is to reveal transformational processes of the digital retail services market under crisis and to identify its development priority areas for the near future. The research objectives are to consider the development trends of online stores and the relevance of marketplaces and mobile applications in the conditions of changing consumer behavior patterns, to identify the retail development prospects to be targeted in the context of national digitalization. The forced change in the target consumer behavior and the restrictions imposed on entrepreneurs have led to a changed landscape of the retail market on the whole, and a reorientation to the digital segment. Under these conditions, a key aspect providing for success and relevance of the company's services for the target consumer segment is the digital representation and relevant content. A number of retailers were put out of business due to the emergence of insurmountable difficulties caused by the new conditions for doing business.
**Keywords:** anti-crisis strategy, digital maturity, digital services, digital services market, marketplaces, online stores, retail

**For citation:** Usova N.V., Loginov M.P., and Nedorostkova E.E. Anti-Crisis Strategies of the Digital Retail Services Market Development // BENEFICIUM. 2021. Vol. 4(41). Pp. 23-29. DOI: 10.34680/BENEFICIUM.2021.4(41).23-29

ОРИГИНАЛЬНАЯ СТАТЬЯ

# АНТИКРИЗИСНЫЕ СТРАТЕГИИ РАЗВИТИЯ РЫНКА ЦИФРОВЫХ УСЛУГ РОЗНИЧНОЙ ТОРГОВЛИ

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**Аннотация.** Рынок услуг розничной торговли, встроенный в еженедельный цикл жизнедеятельности человека и предоставляющий товары на рынке B2C, относится к числу перспективных и наиболее значимых сегментов рынка. Развитие цифровых технологий, трансформация модели национальной экономики и вхождение населения, активно использующего цифровое пространство, в категорию трудоспособного требуют от бизнес-сообщества пересмотра моделей поведения. Прошедший 2020 г. стал катализатором внедрения цифровых технологий. В рамках данного исследования для авторов представляет интерес изучение трансформации рынка цифровых услуг розничной торговли с учетом кризисных явлений в экономике и изменений в поведении потребителя, вызванных пандемией COVID-19. Целью исследования является выявление трансформационных процессов рынка цифровых услуг розничной торговли в условиях кризиса и определение приоритетных направлений его развития в ближайшее время. Задачи исследования состоят в рассмотрении тенденций развития интернет-магазинов и выявлении трендов

востребованности маркетплейсов в условиях изменения модели поведения потребителя, а также в определении перспективных направлений развития розничной торговли в условиях цифровой трансформации национальной экономики. Вынужденное изменение модели поведения потребителей и введение ряда ограничений для предпринимателей привели к изменениям ландшафта рынка услуг розничной торговли в целом и переориентации на цифровой сегмент. В сложившихся условиях одним из ключевых аспектов, определяющих успешность и востребованность у целевого потребительского сегмента услуг компании, является ее представленность в цифровом пространстве и наличие актуального контента. Ряд предприятий розничной торговли был вынужден уйти с рынка ввиду возникновения непреодолимых сложностей, вызванных формированием новых условий осуществления предпринимательской деятельности.
**Ключевые слова:** антикризисная стратегия, цифровая зрелость, цифровые услуги, рынок цифровых услуг, маркетплейсы, интернет-магазины, розничная торговля

**Для цитирования:** Usova N.V., Loginov M.P., and Nedorostkova E.E. Anti-Crisis Strategies of the Digital Retail Services Market Development // BENEFICIUM. 2021. Vol. 4(41). Pp. 23-29. (На англ.). DOI: 10.34680/BENEFICIUM.2021.4(41).23-29

The transition of the national economy to a digital model and the economic crisis caused by the COVID-19 pandemic have significantly changed the national economy structure and shifted the focus from traditional to digital interaction tools. This is also the way the digital retail market has been transformed. So, it seems necessary to study the issues of the digital retail services market transformation based on improving the applied digital technologies and public perception of the new business models.

In the course of the research, the authors considered the findings of various companies, as well as scientific papers devoted to digital services market in general [1, 2], the development of the digital retail services market under crisis and pandemic, the regional digital retail services market [3, 4], the specifics of the e-commerce development in the Russian Federation [5-11], the issues of digital trade development in the context of digital economy [12-14] and others.

Digital technologies development affects all business activities and retail service sector is no exception. It is important to note that retail services are closely interrelated with financial services. Thus, the dynamics of non-cash payment share in trade turnover is of particular interest (*Fig. 1*). As can be seen, the share of non-cash payments increased significantly over the research period, and when in January 2017 the indicator was 38.9%, in January 2021 it was 60.6%. In the authors' opinion, the annual growth trend for this indicator will continue in the future.

The restrictions introduced in 2020 due to the difficult epidemiological situation have led to a number of consequences, in particular, increased unemployment, decreased income in the business sector and bankruptcy of a number of organizations, as well as a decrease in the main macroeconomic indicators of the national economy.

Enterprises and organizations in various activity fields had to reconsider their work model and introduce digital interaction tools, both at corporate level and for their target audience. Most enterprises had to face a lack of financial resources to pay wages and other mandatory payments, increased accounts receivable, decreased demand for goods and services and the following deterioration in company's financial performance.

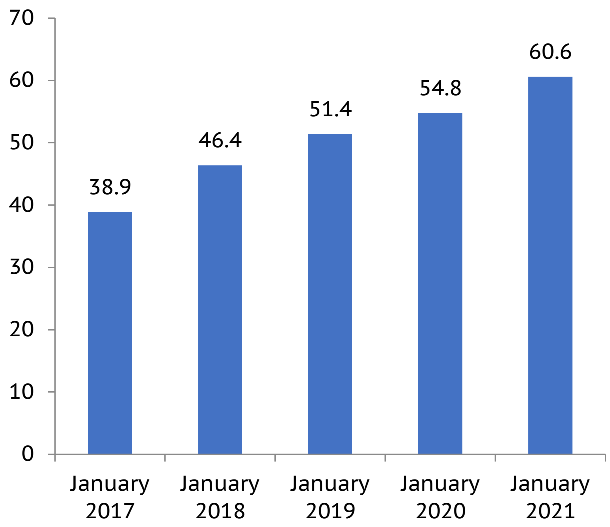


*Fig. 1.* **Dynamics of the Share of Non-Cash Payments in Trade Turnover in Russia, %** / *Рис. 1.* **Динамика доли безналичных платежей в товарообороте в России, %**

*Source:* compiled by the authors based on [15] / *Источник:* построено авторами на основе [15]

Remarkably, if we look at the digital maturity of commerce in comparison with other industries, a very notable fact can be observed (*Fig. 2*). The digital maturity level of commerce in Russia is second only to the banking sector, but at the same time, both areas are rather closely interconnected and the development of one area stimulates the development of the other, which is very important in the context of increasing competition not only between countries at the global level, but also at the sectoral and corporate levels.

At the same time, the retail services market digitization is limited due to the social reluctance to actively use digital technologies in daily life. The low level of digital literacy and lack of trust to digital companies have become a destabilizing factor on the way to the digital services market development in general and retail in particular.

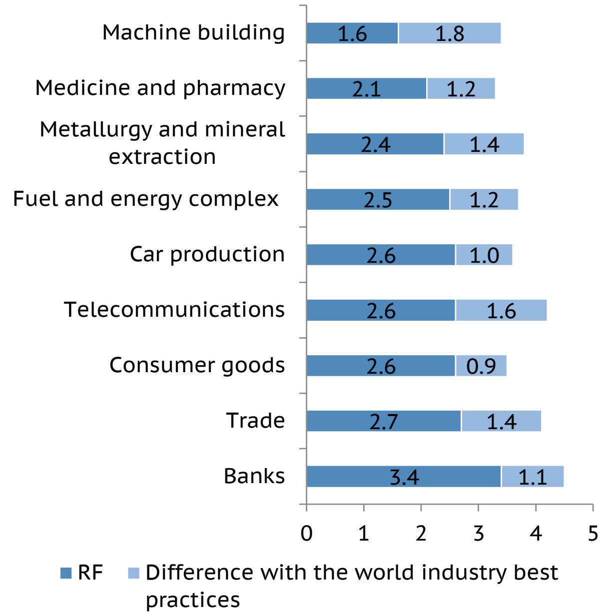


*Fig. 2.* **Assessment of Digital Maturity Level by Industries for All Sectors of Activity, in points** / *Рис. 2.* **Оценка уровня цифровой зрелости по отраслям для всех секторов деятельности, в баллах**

*Source:* [16] / *Источник:* [16]

Thus, according to the results of the study [17], it has been identified that for the majority of respondents the key factors in choosing online trade are:

– ability to compare prices and save money due to lower prices on the Internet;

– opportunities to purchase goods at any time of the day, reducing the time spent on purchases and the availability of other people's reviews.

At the same time, the reasons for refusing to purchase goods and services in the digital space are:

– inability to touch and try the goods on;

– doubts in quality of the purchased items;

– fears and concerns about where to go and who to address in case of problems and difficulties with returning goods.

When choosing an online store the most important aspects for a buyer are the ability to pay on receipt, positive reviews about the store, friends' experience and the size of the store

In addition, it is due to the crisis and restrictions, that the population was forced to master digital technologies, in particular, to learn to choose, order and pay for services without leaving home and, most likely, there is hardly a way back to the previous services consumption format. After all, consumers are getting the opportunity to choose at any time and using any device with Internet access.

As the Association of Internet Companies of Trade [18] reports, in 2020 the national digital retail services market demonstrated a considerable growth compared to 2019. So, for example, the market turnover exceeded the 2019 indicators by 58.5% and reached 3.2 trillion rubles. Moreover, the trend is expected to continue and reach an indicator of 3.745 trillion rubles in 2021. It is also important to mention that the growth is characterized by the reorientation of the target audience to the local market. Cross-border trade decreased from 29% in 2019 to 14% in 2020.

Also, the ranking results of the largest online stores in 2020 are a particular focus of attention (*Fig. 3*). It is worth mentioning that the authors of this rating do not distinguish between online stores and marketplaces.

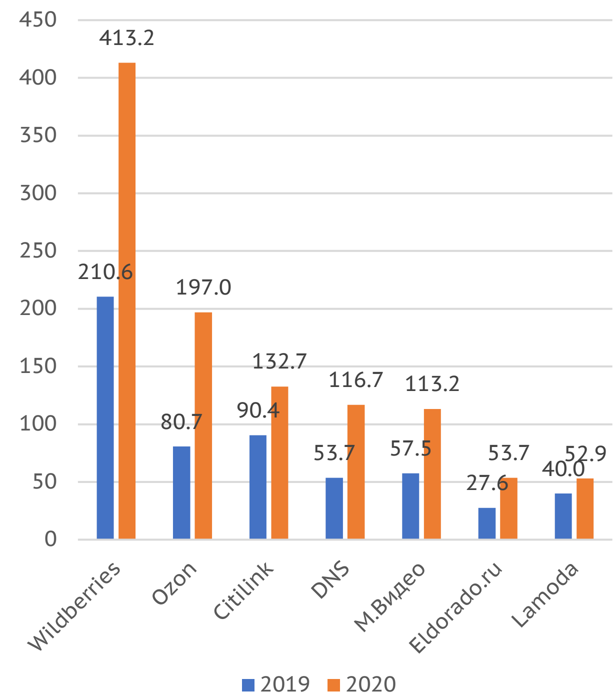


*Fig. 3.* **Dynamics of Turnover of Major Online Stores in Russia, bln rubles /** *Рис. 3.* **Динамика оборота крупнейших интернет-магазинов в России, млрд. рублей**

*Source:* compiled by the authors based on [18] / *Источник:* построено авторами на основе [18]

Judging by the 2020 results, marketplaces occupy the leading place as the most convenient and demanded platforms for consumers.

The 2020 economic crisis served as a catalyst for marketplaces development. The largest marketplaces operating on Russia national market include AliExpress, Goods, Ozon, WILDBERRIES, Яндекс.Маркет. Each of which enjoys great demand and, in the conditions of crisis, has also undergone transformation considering the trends in the global and national economy.

According to the results of the "Sellers on the Russian marketplaces" research [19] the 2020 trends looked as following.

First, marketplaces have become the fastest growing online sales channel.

Second, for more than half of the sellers (55%) using marketplaces to sell goods, this is the main or the only selling channel.

Third, the most popular sales channel is the own online store (41% of sellers). Almost half of marketplace sellers (45%) do not use online store or website for selling.

Fourth, the expectations which became the reasons to start selling on marketplaces:

- wider audience and growing sales (79%);
- selling own products in other regions (42%);
- increased product awareness (37%);
- digitalization (29%);
- reduction of product sales costs (20%);
- start of sales (18%);
- current trends following (13%).

Besides, each of the functioning marketplaces has its own specifics. There are five key marketplaces in the national market: AliExpress, Goods, OZON, WILDBERRIES and Яндекс.Маркет.

The demand for these marketplaces among both sellers on the market of the Russian Federation is illustrated in *Fig. 4*.

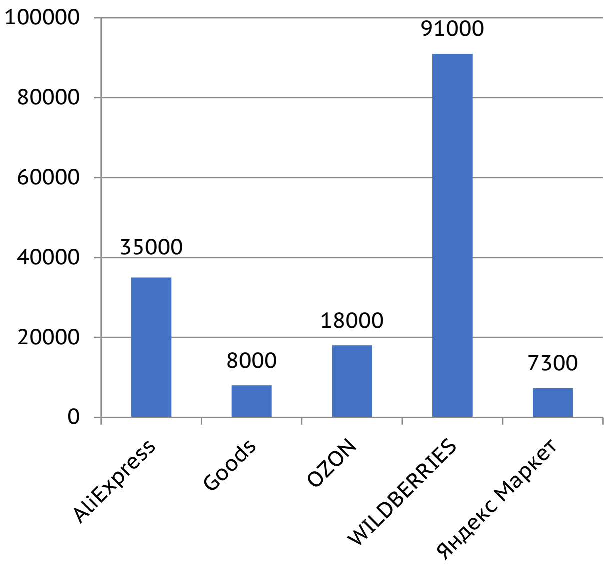


*Fig. 4.* **The Number of Sellers on the Key Marketplaces of Russia, 2020, unit** / *Рис. 4.* **Количество продавцов на основных торговых площадках России, 2020 г., ед.**

*Source:* compiled by the authors based on [19, 20] / *Источник:* разработано авторами с использованием [19, 20]

Thus, the leading positions are occupied by OZON, the Russian segment of AliExpress and WILDBERRIES, setting the national market development trends. However, the COVID-19 pandemic has affected its activities. In 2020, in particular, goods could be purchased only on advance payment conditions, although before the COVID-19 pandemic the postpaid method was used and customers could pay for the purchased goods upon receipt.

Let us consider the number of direct visits to the websites (*Fig. 5*).

Here, a broadly similar picture can be observed if viewed from the perspective of consumer leaders, although there are certain differences. The most popular is AliExpress, while OZON and WILDBERRIES retain the top three positions. And Goods marketplace is not that popular with consumers.

Out of the entire set of the key marketplaces under consideration, the leading product category in WILDBERRIES' traffic only is clothing, footwear and accessories. For the rest of the aggregate marketplaces, the leader is technical devices and electronics.

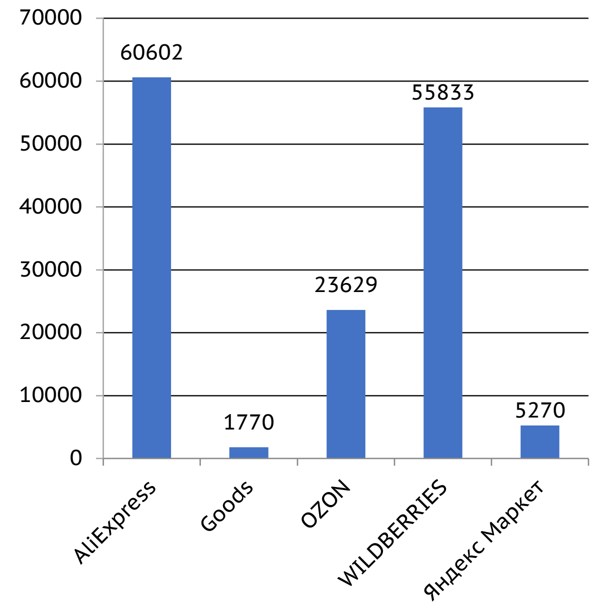


*Fig. 5.* **Average Monthly Number of Direct Visits to the Site, thousand** / *Рис. 5.* **Среднемесячное количество прямых посещений сайта, тыс.**

*Source:* compiled by the authors based on [19, 20] / *Источник:* разработано авторами с использованием [19, 20]

In the conditions of the COVID-19 pandemic, consumers preferred to purchase goods either from 'corner stores' or online platforms. Malls and shopping centers are not in demand during the COVID-19 pandemic.

Digitalization is a key factor in retail development, which makes it possible to create new business models and change the customers' needs and behavior.

So, in 2020, the following trends of the digital retail services development can be distinguished [21].

First, online sales and popularity of marketplaces have been explosively growing. Moreover, this trend will continue in the future, due to the more favourable prices for goods in comparison to conventional stores and quite inexpensive or free delivery of the purchased goods.

Second, the strong growth of the e-commerce segment is illustrated by the exceeding share of respondents who prefer digital retail services as opposed to the traditional ones when buying New Year gifts. Here, one may talk about the growing demand for omnichannel trade, providing for interaction with the consumer at any time and on various platforms saving the interaction history.

Third, consumer habits transformation. If, before the COVID-19 pandemic, the representatives of millennials and generation Z were the main target audience for digital retail services, in 2020 other groups of the population also turned to digital services. Yet, the degree of involvement in the process of purchasing and consuming digital services varies.

Next, the structure of demand for various goods and services has changed. In particular, the leading positions take such categories as home, beauty and health goods (+151%), games (+129%), goods for pets (+115%). The demand for clothes and accessories has decreased because of self-isolation.

Last, the demand for mobile applications has also changed. For example, by the 2020 results, the demand for mobile applications was the following: food delivery – 36%, social networks – 33%, retail shopping – 33%, podcasts and music – 28%, finance, streaming video, and food / alcohol delivery – 27% each, games – 25%, video conferencing – 24%, news – 22%, home workouts – 13%, children training – 11%, training for adults – 9%, stress relief and productivity – 7% each, and none of the above – 16%.

It should be noted, that if previously the digital retail services were perceived as additional format of interaction with the target audience, in the context of the crisis and the COVID-19 pandemic these services enjoyed the greatest demand and popularity among consumers.

Digital services in retail sector are gaining priority as a development area under crisis, because they contribute to business costs reduction and, at the same time, allow to further interact with the target audience.

The digital commerce development provides accessibility of goods and services for the end consumer, levels off territorial differences in terms of analogue services availability. For retailers, the most relevant is the transition to the Internet, which allows them not only to provide a certain sales volume, but also to increase their competitiveness level. Success in the market is no more directly dependent on the size of the company itself, and the costs of opening and operating a digital retail enterprise are considerably lower, which is also an incentive for the active development of this segment of the national digital services market.

As can be seen from the above, the development of the digital retail services market has a number of positive aspects for consumers and the national economy.

First, the transition of competition from the analogue space to the digital one, which is illustrated by the dominance of individual online stores or marketplaces. Some of the bright examples are Amazon and Alibaba, which have transformed over the course of their existence and are the most demanded digital platforms at the global level.

Second, the digital retail services market development allows to customize and personalize offers for consumers, balancing the influence of the spatial aspect.

Third, the rise of innovative startups in retail field.

Next, the opportunity to improve the efficiency of business activity through the digital retail services provision. For instance, volume of costs for opening and operating a digital store is significantly lower than that of a conventional one.

Then, improving the competitiveness of national retailers.

Finally, improving the quality of life of the population owing to the round the clock availability of digital retail services. In addition, the availability of services is not affected by the materialization level of goods.

Although the COVID-19 pandemic and economic crisis have positively influenced the digital retail services development, in the authors' opinion, there are certain problems to be addressed in the near future.

First, the low level of established digital skills among consumers and digital technologies among sellers.

Secondly, the high differentiation of federal districts in terms of the level of digital retail services development, which negatively affects national indicators.

Third, there is a fairly high level of public distrust to digital technologies and representatives of the retail industry in the Internet.

Next, lack of strategic documents aimed at developing and improving the digital retail services market. Regarding the fact that the digital segment of the national economy is a strategic development priority area, the development of these strategic documents is gaining importance and relevance both at national and regional levels. At the national level, key priorities should be identified and risks in the digital retail market revealed. In turn, at the regional level, the specifics of the territory itself and also, the development features of the digital retail services market should be considered in strategic documents. In particular, for some territories the emphasis on conventional trade is characteristic, for others the significant constraint to the digital segment development is the insufficient level of digital technologies penetration into the life of society.

Further improvements to the sales system and the digital retail services development will enable to reduce the spatial aspect influence, ensure the development of multi-format and the possibility of choice for the consumers. When providing traditional retail services the location of the seller, the level and the quality of the service provided are key factors. Under the conditions of the coerced self-isolation and transition to the Internet, seller recognizability, quality of goods, payment and delivery terms are of particular importance. In turn for the seller, digital retail services provide an opportunity to keep their market share and maintain interaction with the target audience, but using digital technologies. Besides, manufactures and consumers can interact at various platforms (online stores, marketplaces).

The future is digital. It is the adaptation to new products and technological solutions, the ability to provide digital services, which determine the retailers' competitiveness level in digital economy.

In the coming few years, the following technologies will have a major impact on retail development: robotics, drones, 3D printing, virtual reality (VR), Internet of things (IoT), new client interfaces, cloud technologies, blockchain, augmented reality (AR) and artificial intelligence (AI).

The digital technologies globalization has already changed consumer needs and behavior patterns. In the conditions of the national economy digital transformation, these processes will intensify and will be expressed in the increased share of digital trade and a shift in emphasis from traditional retail facilities to digital ones.

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Дата поступления статьи: 19 октября 2021
Принято решение о публикации: 20 ноября 2021

Received: October 19, 2021
Accepted: November 20, 2021