



POLITECNICO
DI MILANO

HOW TO FACILITATE THE ACCESSIBILITY OF LOW COST FURNITURE IN A DEVELOPING COUNTRY

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// The best time to plant a tree was 20 years ago. The second best time is now. //

-Chinese Proverb

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ABSTRACT

The aim of this thesis is to analyse a specific shopping problem on how IKEA Romania can cover more territory and reach more customers, without having to open another brick-and-mortar shop in the country.

To get a better understanding on why until 2015 they haven't opened another unit or why they did not penetrate a bigger market, I will present and analyze in this thesis the cultural and shopping habits of Romanians, but also present the brief history of IKEA in the Romanian market. I also managed to get the help of the IKEA marketing department in answering me some questions and presenting me with real data and numbers regarding the Romanian consumers. Furthermore, I will also make a brief introduction in the furniture industry in Romania, so the reader can understand the potential of development that exists in the country.

The solution that I want to propose is a temporary one that aims to grow the number of consumers and also make IKEA more present on the Romanian market. After research in existing temporary solutions and existing marketing strategies, I managed to compose a service that will satisfy both the buyers and the company.



INTRODUCTION

FURNITURE TRADITION IN ROMANIA



The beginnings of the woodworking industry in Romania date since around 1900. The wood working and the furniture were done by skilled crafts men and the furniture was mostly used in the traditional peasant home. The furniture created then was very simple and adapted to the needs of the Romanian peasant. The Romanian traditional home had 1-3 rooms and they determined a certain scheme for the furniture. The result was that the furniture was placed near the walls and some items were hanged on the wall.

The furniture in the traditional house was placed as it follows. Some pieces were fixed between the girders, on the ceiling or on the floor. The furniture had a very natural look to it. For example tree trunks were used as chairs. The Romanian traditional forest was very simple in shape, but it was carefully decorated. The preoccupation of ornaments was very important in that time.

Wood was the main material the Romanian used to create furniture. However, in Southern Romania people used also clay to

create furniture. In Transylvania, they had a very developed sense of decorations. They painted the furniture and also sculpted it. The most used painted decorations are the floral motifs. The sculpted furniture, found mostly in Moldavia and Walachia used ornaments as: straight lines, points, spirals, crosses, firs and sometimes, figurines.

In the traditional Romanian home, the main pieces were: the bed, the table, the chairs, the lavite, the blidare, the corner, the boards, the culme and the dwory chest.

FURNITURE INDUSTRY IN ROMANIA



Each of us has our own microenvironment, where we spend most of our time working and relaxing. This assures the furniture production a permanent presence in the economic activity.

After the communist regime fell, Romania recorded an accelerated development in the furniture industry. Starting with 1989, the wood industry was organized in firms and wood-processing factories, comprising two major industries: the forestry exploitation industry and the furniture industry. In the furniture industry there were 47 wood manufacture factories with approximately 180000 workers (FSLIL, 2008).

After 1989, in the early years of the transition, Romania registered a negative evolution of the sector, caused by the loss of the traditional markets, the delayed and poorly made privatization, and the change in the economic mechanism, foreign exchange fluctuations and attitudes inconsistent with the principles of market economy. However, there was a recovery

through a deep restructuring. The factors that contributed to this were the foreign investments, the domestic private capital formation and the advantages offered by the sector (production capacities with highly skilled workforce, material resources, increasing demand from the foreign market). In the recent years there have been recorded a great number of new firms in the furniture sectors, that are dynamic and excited to progress. According to Eurostat, in 2010, there were 3077 furniture enterprises in Romania with a number of 60.482 million persons employed.

A very important aspect in the development of the furniture industry is the existence of forest resources. Romania has a great forestry fund that occupies 26.4% of the country's total area and contains the following species: 32.6% of total beech wood, coniferous 30.6%, oak 16.7% and various species 20.0% (RSY, 2012).

Labor productivity in the furniture industry

expressed by turnover per employed in Germany, France and Italy is more than 40% higher than the European average, and more than five times higher in comparison to Romania, due to the technologies utilized and the organization production.

In Romania furniture production is based on the integrated activity system, and in western countries production is based on the extensive cooperation with semi-products and pre-fabricated, that lead to increasing productivity through specialization. Wage levels in Romania are about 9 times lower than in France and Germany. This partially explains the higher profitability in Romania, expressed in Gross operating rate (Gross operating surplus/turnover, 9.8%), being surpassed only by the UK and Poland (12,8%).

FURNITURE EXPORTS AND CONSUMPTION IN ROMANIA



fig. 01 - furniture market diagram - source: Eurostat

FURNITURE EXPORTS

The woodworking and furniture Industries in the European industry was influenced by the global economy. It created both challenges and opportunities. 20% of the world furniture export is done by the EU furniture industry; this is why it is considered to be a major player on the global market. Globalization is influencing this industry, so for the EU to maintain its favorable position on the market, it has to use its competitive advantages: „flexible production that allows products to be customized; high quality specifications and advanced technology; superior design; development of values other than price-based value (e.g. branding, buying experience); integration of pre- and after-sales services; quick distribution with minimal stock keeping“ (EESC, 2011).

Romania registers a level of consumption four times lower than the EU average, due to low purchasing power. As a result 60% of production is exported. Before 1989, Romania exported 70% of its furniture production. It ranked at that period, 20th in the world, and it has a profit of 500 thousand dollars.

Nowadays, Romania ranks 10th in terms of furniture exports in EU. Europe’s top furniture export countries are Germany, Italy and Poland. Romania’s furniture exports faced the economic crisis and managed to outgrow it by 2008. The main reasons for this success are the century old expertise of certain factories, the qualified and cheap labor force and the abundance of quality raw materials.

“Studies specialists have carried out so far reveal that the furniture demand is on the rise. As a country, Romania has all the conditions to manufacture high-end furniture items, and we have

seen that our numbers on the foreign market have gone up, due to our tradition in this field, our labor force, to the quality raw material we have and which we want to use to make furniture, not to sell it as logs, timber or wooden plates. We were very happy to find out that 2014 had been the first year when furniture exports surpassed the overall value of exports of raw materials, such as logs or timber. Furniture exports therefore went up, from 47.7% in 2012, for instance, to 50.4% last year. 2014 was also the first year when log exports went down, including timber exports, while furniture exports went up by 11.1%. At the same time, log and timber exports went up, which is a positive signal, given our available capacity. Investments in this sector are also growing.”

The president of the Romanian Furniture Makers’ Association, Aurica Sereny

- over 90% of wood raw material and about 55% of auxiliary materials exist in Romania
- tradition and experience in domain
- the possibility to recover the wood waste
- the diversity of products manufactured and production flexibility
- qualified personnel with specialised skills
- economic operators located throughout the whole country
- reduced costs and competitive prices

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- The technological gap and low productivity
- poor marketing strategies
- poor distribution
- selling products through intermediaries;
- low level of informatization;
- high Consumption
- inadequate access infrastructure
- high bank interests
- low level of salaries

- quality raw materials
- a stable traditional market
- possibilities of modernization and refurbishment

- high costs and delays due to the infrastructure
- cheap furniture imported from outside the EU
- insufficient Brands
- external market shares lower than main competitor's
- malfunctions registered in relations with suppliers
- Fluctuations of the exchange rate
- increasing prices for raw materials

fig. 02 - source: Romanian Furniture Makers' Association

FURNITURE CONSUMPTION

The consumers are becoming more selective when dealing with the furniture sector. They are looking close on the quality of material used, the functionality and the special design. The Romanian manufacturers have to identify the consumer trends and patterns and try to meet them as good as possible. In fig. 02 you can see the SWOT analysis for the Romanian furniture sector that presents the challenges faced by the manufacturers. The developing strategy of the furniture industry in Romania wants to raise the level of quality, design and price of the products made in the country, so that they can position the sector among the world leaders.

Some objectives of the future development include: promoting green technologies, improving management

and marketing, diversifying production structures, expansion and information technology, appropriate technology development, recover market consolidation, recovering the Community of Independent States market, implementation of quality environmental management system etc.

Aurica Sereny also referred to the domestic market:

“According to our research, the internal demand has gone up, particularly the demand for HoReCa furniture, namely furniture addressing the hospitality industry. The demand for hardwood furniture has also gone up. At the same time, consumption of cheap furniture has also increased, especially imported furniture which is very cheap and is brought in from China, Turkey and Poland. Those countries have therefore increased their exports of cheap furniture to Romania. Our producers, although they manufacture wooden-plated furniture, focus on medium- and high-price items. We cannot compete with China,

given that our companies receive no subsidies whatsoever. Most of the manufacturing costs are being subsidized in China, thus enabling the companies to sell cheap furniture. Of course, this type of furniture is less sturdy, but that’s a different story”.

MAIN PLAYERS ON THE ROMANIAN MARKET



fig. 03 - main areas of furniture production -
source: Romanian Furniture Makers' Association

The most important players on the Romanian market in the furniture industry are: Aramis Invest – with a turnover of 109.16 million of Euro, Italsofa – 70.95 millions of Euro, Taparo – 55.65 millions of Euro, Cotta International – 46.18 millions of Euro, Grup Parisot – 41.53 millions of Euro.

All of these firms as well as the other ones in top 20 (like Casa Rusu, Lemet, Mobexpert, Elvila) registered a great increase of their figures in 2011, compared to 2010. For example, Aramis Invest succeeded to increase its turnover with 40.5%, Cotta International with 9.1%, Ecolor with 36.1%.

Aramis has almost 3000 employees and is a local supplier for IKEA, this being an explanation for its position and results.

Cotta International is the main supplier for KIKI in Romania, so these partnerships with big retailers in the

furniture industry is the key to succeed. Small companies have no chance in a world dominated by big operators, low prices and high quality of furniture offered to more demanding buyers.

Romania has a high forest resource that constitutes as an important consideration in developing the furniture industry. The areas with the highest number of wood working plants and furniture manufacturers are concentrated around forest grounds. These areas are: Maramures, Salaj, Cluj, Alba, Hunedoara, Arad, Timis, Brasov, Prahova, Bucuresti. In Romania, the forestry fund occupies 26.4% of the country's total area and contains the following species: 32.6% of total beech wood, coniferous 30.6%, oak 16.7% and various species 20.0% (RSY, 2012).



IKEA IN ROMANIA

IKEA OVERVIEW

Ikea Group is now the biggest furniture store in the world, with no true worldwide rivals. There's still room to expand, because despite huge brand awareness, Ikea accounts for only 5 to 10 percent of the furniture market in the countries in which it operates [source: Capell]. The stores still aim to meet Ingvar Kamprad's original vision. This vision, "to create a better everyday life for the many people," was set forth more than 30 years ago by Kamprad in a manifesto now presented to every Ikea employee.

The IKEA Concept starts with the idea of providing a range of home furnishing products that are affordable to the many people, not just the few. It is achieved by combining function, quality, design and value - always with sustainability in mind. The IKEA Concept exists in every part of the company, from design, sourcing, packing and distributing through to the business model. The aim is to help more people live a better life at home.

MORNINGS IN BUCHAREST

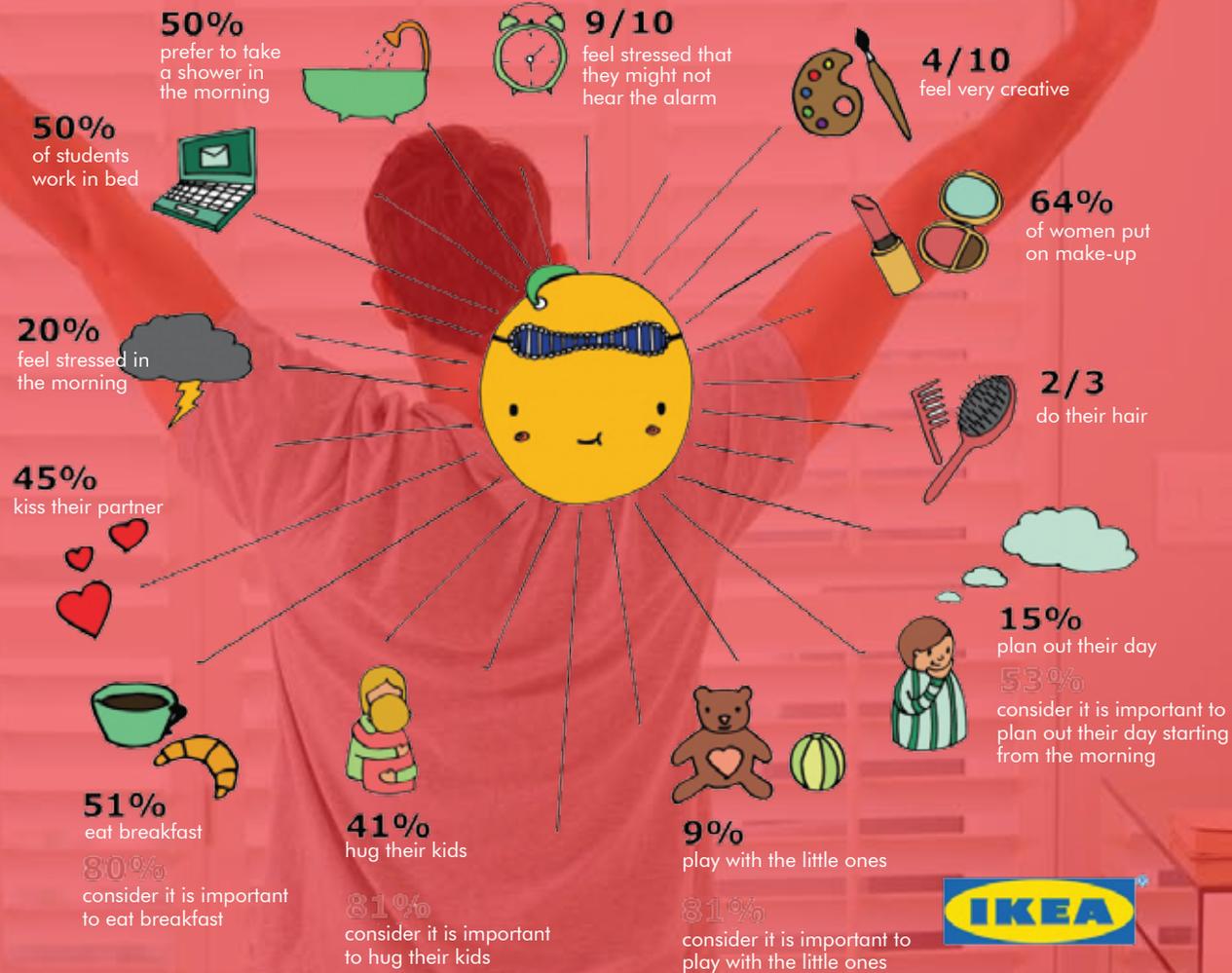


fig. 04 - source: IKEA Romania

Kampard's vision is still very important in the IKEA stores and they aim to meet his standards every day. This is why IKEA aims to create products that make life at home better. IKEA is conducting research continuously to find our consumer trends and try to meet people's needs as good as possible. In their research they visit thousands of homes from around the world to produce quantitative and qualitative methods of improving people's lives.

Last year they published the "Life at Home" Report that focused on the habits people have in the morning. There were 14 cities analyzed, one of them being Bucharest.

"When we published our Life at Home Report through an interactive website, people from all over the world dove into it. We want to show that we're serious about truly understanding people's everyday life situations, what works and what doesn't. And, we decided to share because we at IKEA have decided to open up behind the scenes. In addition, we see that we create an interest in life at home".

Mikael Ydholm, Research Manager

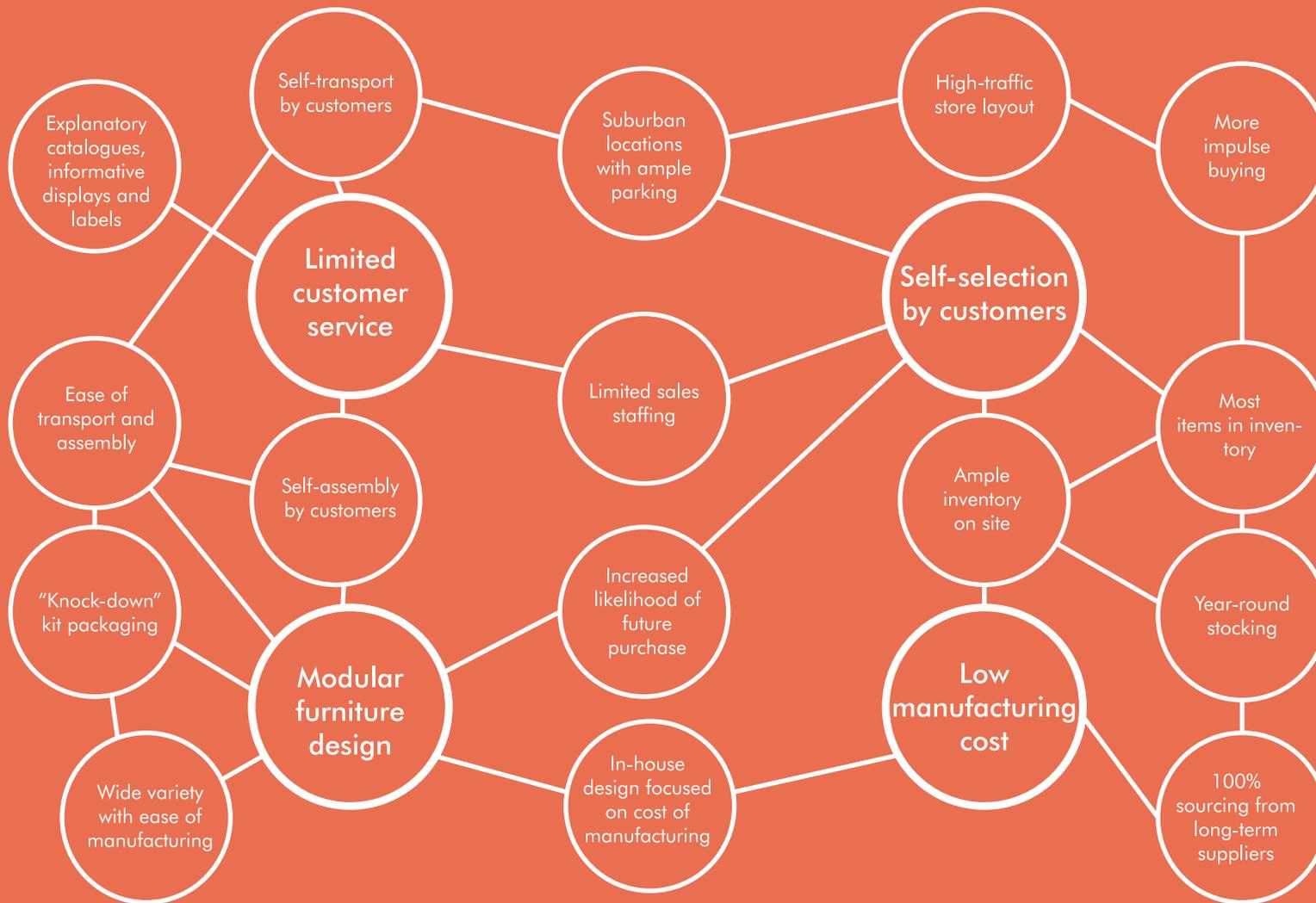


fig. 05 - IKEA activity map

- a strong global brand which attracts key consumer groups. It promises the same quality and range worldwide
- its vision 'to create a better everyday life for many people'
- a strong concept based on offering a wide range of well designed, functional products at low prices
- a 'democratic design' reaching an ideal balance between function, quality, design and price. IKEA's 'Cost Consciousness' means that low prices are taken into account when each product is designed from the outset.
- cash and carry customer experience
- cafe and babysitting service
- flat packages - economies of scale

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- the size and scale of its global business. This could make it hard to control standards and quality.
- assembly of products
- store locations limited
- lack of delivery options
- long check-out process
- concentration of self-service and not customer focused
- standardization of products

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- a growing demand for greener products
- a growing demand for low priced products. Trends in the current financial climate may result in consumers trading down from more expensive stores
- demand for reduced water usage and lower carbon footprints.
- continue to innovate beyond current product offerings
- growth of e-commerce and improve the online shop
- further expansion into developing economies

- competitors are trying to duplicate the IKEA formula and steal market share
- reduced need or want for IKEA products
- comparable products already assembled in other retail stores
- high cost of distribution
- poor economic conditions

fig. 06 - IKEA SWOT analysis

IKEA TIMELINE IN ROMANIA

IKEA Baneasa was opened on the 21st of March 2007. It was the 253rd IKEA shop in the world and Romania was the 35th country where IKEA entered the market. The shop in Baneasa has a 26.000mp, offers a parking lot of 1500 spaces and a restaurant with a capacity of 470 seats. The investment for this IKEA shop was recorded at 25mil euros. It started as a franchise owned by the business man Puiu Popoviciu. In 2010, the operations were bought with 30mil euro by the IKEA Group.

After IKEA was bought by the Swedish group, in 2010, it started to develop its marketing strategies. This resulted in 2014 in a turnover of 106mil Euros, and a 6,45% raise in comparison with the previous year. In 2014, IKEA Food also registered a sales report of 7.5mil lei, and a 3% raise in comparison with 2013.

After three months from closing the transaction with Puiu Popoviciu, IKEA buys through the division Interprime Properties, a five acres land plant near

Timपुरi Noi in Bucharest. It was one of the factories permanently observed communist Nicolae Ceausescu.

IKEA had serious competitors in their efforts to obtain the land. The bid was among some of the biggest international retail chains, including France's Auchan who were interested in buying the whole lot of land, Kaufland wanted to open a new store and buy 20000mp, Mega Image - part of Belgian group Delhaize - was interested in 10,000 square meters, while an Israeli investor planned to build a hotel on 4,000 square meters of former factory platform. The property was estimated at 34.6 mil euro. It was thought back then that IKEA will build a second store, but the group had other plans. They plan on building a business park and a residential complex.

IKEA plans by 2016 to finish building two office buildings, with a rent surface of 30.000mp. They also plan to build another office building and a residential complex of 700 apartments. However the

idea of opening a new IKEA flagship store has been postponed. After NOKIA left Romania, it was said that IKEA showed interest in purchasing the factory, to open a production line.

On 15th of June after a lot of speculations IKEA finally announced where they will open their new store. The new IKEA store will be opened in Bucharest as well, in another commercial park in the west of the capital.

IKEA SALES REPORTS IN ROMANIA



IKEA SALES REPORT 2013

In the year 2013, IKEA Romania registered a growth of 10% in sales in comparison with the previous year and sales numbers registered at 440 mil lei.

A raise has been registered also in the people that visited the store. In comparison with the previous year, 200.000 more people visited the shop, in total 3.2 mil visitors. This resulted in number of 12.08 mil products in the Romanians' homes. From the total sales value, 56% was generated by furniture products and 44% were accessories and decorations.

The most sold products in 2013 were the PAX wardrobes, with 126.799 pieces sold. From the accessories and decorations sector, the pots and pans, and kitchen wear IKEA 365+, registered the highest number in sales, totaling at 258.444 pieces.

IKEA Food registered also a 7% growth both in the restaurant and in the Swedish products shop and bistro. The total sales were 32.962.352 lei.

IKEA Romania also played a part in a better life. They collected and recycled over 691.5 t of paper and cardboard, 60.6 t of metal, 121 t of wood, 69.5 t of plastic, 18.7 t of glass, 10.9 t of batteries and light bulbs and over 1.5 combustibles. They managed to recycle 70% from the waste it generated in 2013.

IKEA SALES REPORT 2014

In the year 2014, IKEA Romania registered a growth of 6.45% in sales in comparison with the previous year and sales numbers registered at 468 mil lei.

The number of people that visited the shop registered at 3.232.810, with 30.820 more than last year. This translated in a total of 13.258.148 products sold, out of which

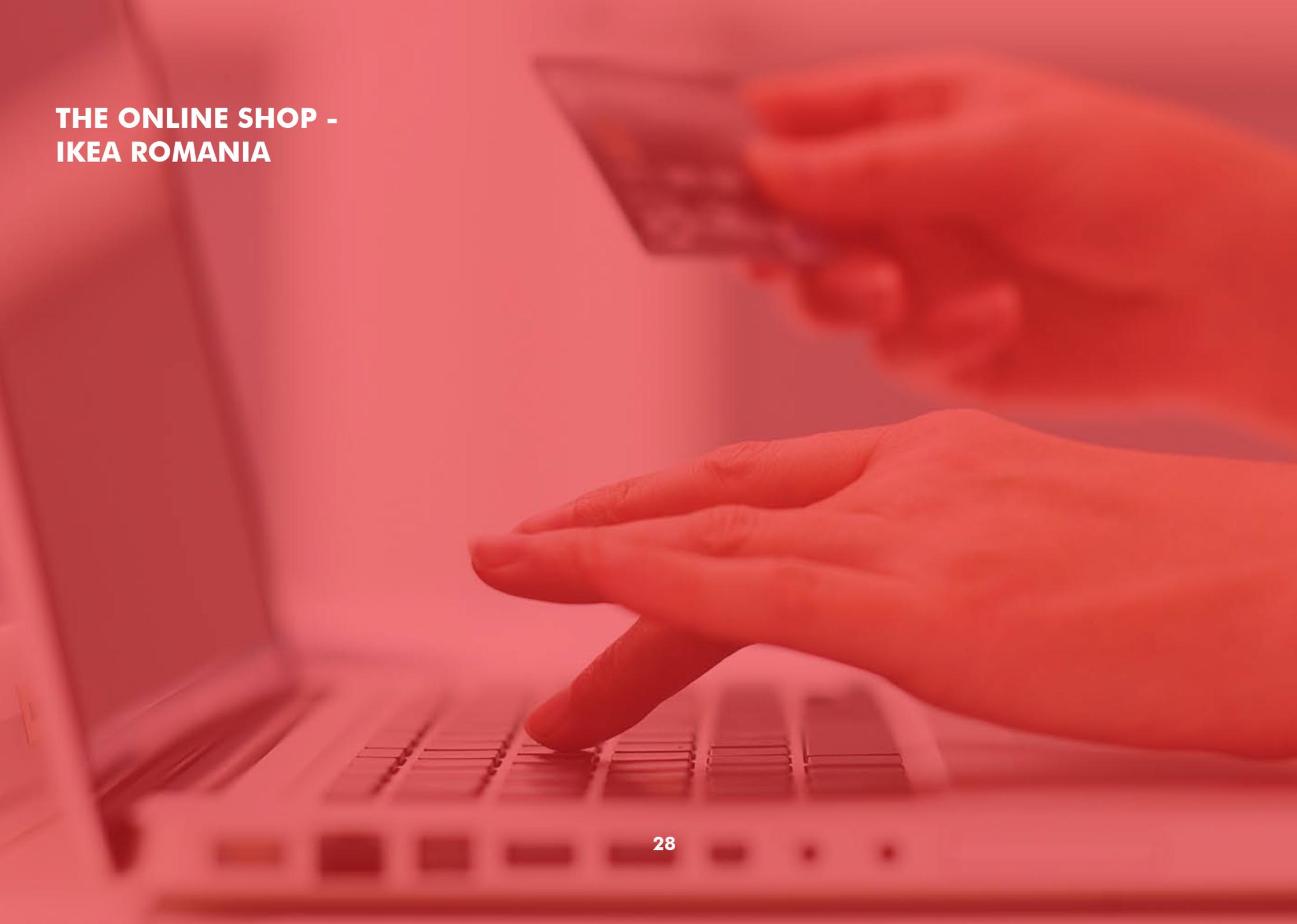
60% were furniture products and 40% were accessories and decorations.

The most successful was the brand Hemnes (storage furniture for bedroom, living room and bathroom), that has a total of 15.691 pieces sold. From the accessories and decorations section, IKEA 365+, pots and pans and kitchenware, has a total of 281.653 product sold.

This year IKEA Food, both the restaurant and the Swedish shop and bistro, had a growth of 3% in comparison with 2013.

On the green solutions and economical sector IKEA Romania had an improvement. In the year 2014, IKEA Romania consumed 4.543 MWh electricity with 25% less than last year. From the total waste generated by the shop, they managed to recycle 73%. They collected 799.5 t of paper and cardboard, 22.2 t of metal, 76.2 t of wood, 62.4 t of plastic, 12.2 t of glass, and 18.3 t of electric waste.

**THE ONLINE SHOP -
IKEA ROMANIA**



IKEA Romania knows that it has a lot of room of development and that it is not reaching the entire client basis in the country. This is why last year, in July 2014 they launched the IKEA online shop. They want to reach more customers, especially the ones that can't come to the physical store. This decision was taken, especially as last year, the website registered 20% more visits, while the visits in store were on a descending trend. However, the Swedish company still considers the stores as their main engine of producing revenues and growing their business.

In Romania, for every order there will be a collecting fee of 49 lei (10eur), no matter how many items are in the package, to which it will be added a fee of 1leu/kg (0.22eur/kg) for the delivery at the client's door. For the moment the payment is done cash when the order arrives at the customer. They plan to introduce the option to pay online as soon as possible.

The launch of the IKEA online store had a big impact both for IKEA and for the Romanian consumer. After one month from making available this service, the Romanian consumers placed 3.500 orders. The majority of orders were placed close to the store in Bucharest. From the total of orders placed by 31st August 2014, approximately 17% were placed by people who live in Bucharest, and the rest of the orders were placed by people from Cluj, Timis, Iasi and Constanta.

The biggest sum they registered for an online order with transportation was 22.000 lei (4.900 euro).

The marketing director from IKEA Romania, Mihaela Muresan, knows that the delivery cost is a big issue for the customers. They are researching now new solutions to meet the customers need at a better and more convenient price.

MAIN COMPETITORS FOR IKEA ROMANIA

The logo for Kika, featuring the word "kika" in a bold, lowercase, sans-serif font with a thick black outline. The logo is set against a white background within a white rectangular box, which is itself centered on a red background.

"After a comprehensive and detailed market analysis we consider Romania as a country with great market potential. The market entry is therefore the next logical step of our expansion strategy" - Paul Koch managing director of the kika/Leiner group.

kika is an Austrian furniture and decoration retailer and one of the biggest furniture merchants in Europe. They have one store in Bucharest, Romania, and they represent the biggest competition for IKEA Romania. They plan on opening 8 new stores in the future.



Mobexpert is a Romanian furniture and decoration company and they are placed in the top 12 European furniture companies. In Romania they have 5 flagship stores and 23 small units that function in franchise. The Mobexpert Group covers the entire furniture market by producing and selling home furniture and decorations, as well as office furniture. All the furniture sold by them is locally designed and locally produced, this allowing them to have a fair price on the the market. Mobexpert is present in 29 of the most important cities in Romania.



Elvila was founded in Romania in 1990. it is one of the most important local companies in manufacturing and selling furniture. In the present they have 50 medium stores all over the country. Elvila's outlet network is made up of the company's own stores and over 20 franchised stores. Elvila develops in three main directions: franchises, distribution and its own networks. Elvila sells furniture through Metro, Selgros and Carrefour. The group's strategy targets medium and small-income population segment.



"We believe in Romania and we will continue to invest in this country in order to consolidate our presence and open larger stores in the future," said Serafim Palikaras, general manager of Neoset Group.

Neoset is a Greek furniture company. They first entered the Romanian market in 1991 and in 1999 they opened a furniture factory in Romania. Neoset is distributing furniture in 15 stores all around the country through franchising.

DEVELOPMENT AND FUTURE PLANS FOR IKEA ROMANIA



Mihaela Muresan, marketing director at IKEA Romania, and Alexandru Rusu, financial director at IKEA Romania, gave an interview for wall-street.ro, stating their future plans regarding IKEA on the Romanian market.

They stated about the online store that it is a service with completes the IKEA already existing offers. They say that it offers a plus value to the in store traditional purchases, planning for the future years to open a real eCommerce platform for IKEA Romania.

From 15th of July from the launch of the service, until the end of September, the online store registered 6.200 orders, worth 6mil lei (1.341.471euro). This represented 1% of the total sales registered by the furniture company.

Both directors estimated that in the next 12 months the online sales will reach 5% of the total sales. They base this forecast on the fact that IKEA has only one store in Romania and it is located

in Bucharest. They have requests from all over the country – and they stated that the city that shows most interest in IKEA products it's Cluj, located at 448 km from Bucharest.

They were surprised by the popularity that the online shop registered so quickly. The financial director, Alexandru Rusu said that he expects a 6.5% raise in the online sales for the next financial year.

They are considering also modifying the distribution fee. If the client wants to pick his online order from the IKEA store, he has to pay 49lei (10euro) no matter how many items he ordered. If he wants the order to arrive at his doorstep he will pay 11leu/kg (0.22euro/kg). They consider this cost a minus to the service they are offering. Now they are analyzing and researching possibilities of reducing this fee for the online sales.

Even though the transportation cost is 11leu/kg (0.22euro/kg), Romanians prefer to pay the collection fee of 49lei (10euro).

It is interesting the fact that the online sales recorded 65% of furniture and 35% of decorations, while the in store sales recorded 60% of Furniture and 40% of decorations. However this is data collected after the 3 months from the launch and the financial director does not want to make more in detail predictions on what concerns the eCommerce.

As a conclusion the two directors stated that IKEA is focusing on reducing the prices, and this is a very big marketing challenge for them. They are working on optimizing the costs behind the scenes – logistics, operational, internal. Besides the price modifications, and implementing better the online store, IKEA Romania is planning to open another store in the country. In a press release on in June 2015, it was stated that a new land has been bought by IKEA Romania, and the location is still in Bucharest.

A large crowd of people is gathered outside a building entrance. The entrance features a prominent sign that reads "intrare" in large, red, lowercase letters. The crowd consists of people of various ages and genders, many wearing winter clothing. The scene is set against a light-colored building facade. The entire image has a reddish-orange tint.

intrare

ROMANIAN CONSUMERS

HOW ROMANIANS SHOP

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There are two important aspects that rule Romanians behavior in the way they consume nowadays:

- Making the crisis permanent – this is manifested through the decreasing level of salaries and controlling better the way they spend the money.
- The rise in the internet presence in everyday life and the accentuated dynamic of the way information is circulating.

At this moment, the internet is present in 53% of the total population of over 15 years old, and in the urban area it reaches 63%. Smartphones are also present for 25% of the population in Romania. This results in a thirst for fast and dynamic information.

As a general perspective, the consumers are very picky and very hard to make loyal, this is because they are used to comparing the prices of different retailers and to choose the best deal from a price-quality ratio. It is

also notices a behavior in a more differential purchase: people don't buy anymore everything from the same shop, they choose different retailers for different types of products. This behavior is a result of the continuous expansion of the modern retailing in Romania. As an outcome, there is a huge presence of discount offers, especially as new retailers are entering the market. The raise in discounts resulted in a huge evolution of private brands.

Another proof that people are paying more attention to how they are managing their finances and that they are changing also their behavior, is represented by the growth of "user to user" market, visible on online market places like mercador.ro, okazii.ro, olx.ro, etc.

On the same note of being more economical, Romanians changed also their behavior in planning holidays. They are planning their trips ahead of time and they opt for all inclusive packages as they consider it to be more budget friendly for the family.

Another feature of the Romanian consumer is the desire to get fast solutions "here and now", making them very aware of messages that promise this type of services. Because of the more alert type of life and always being pressured by time, Romanians feel that they need to adapt better and manage better a huge amount of information. Therefore, any type of solution that saves them time in buying daily items is more than appreciated. This is why, besides the traditional ways of announcing offers, retailers are starting now to focus more on developing the online sector of their business.

Although Romanians are dealing with low salaries and a low economic position, they still feel the need to spoil themselves. This is why they pay a lot of attention in the quality of the products that they buy, especially the ones that are aimed at making their lives more beautiful or happy.

HOW ROMANIANS SHOP ONLINE

Romanians buy mostly online clothing, accessories and electronics, and the preferred way of payment for more than 80% of them, is cash upon delivery. This report was created by Geminus, and it analyzes the way Romanian women buy, the way Romanian men buy, the average amount Romanians pay for online shopping and the most visited online stores.

The study is called "eCommerce 2014" and it was conducted in August 2014. The research analyzes the behavior of Romanian users when buying online. The study states that more than two thirds of internet users in Romania have bought something online, and 21% of the ones that haven't bought anything by now online, plan to do this in the near future.

It should be mentioned that 41% of the participants in the research, have looked online for shops that they have later on visited, 28% pay bills

online and 16% have bought items from foreign websites.

in the top of online marketing websites visited by Romanians are the online shops, 83% of participants stating that they use it personally, on the second place are the advertisement websites (45%), on the third place the collective discount websites (32%) and on the fourth place the price comparison websites (29%).

The ones that participated in the study consider that the advantages of online shopping are: home delivery (74%), the fact that they don't have to leave their homes (61%) and that the prices are lower than in the traditional shops (53%). As disadvantages they listed the high cost of delivery (31%) and problems with the products' warranty (19%).

The participants said that the factors that might raise the number of online shoppers in Romania are money

related: lower prices (59%), the low delivery cost (54%) and the extra discounts (52%).

When asked what are the most popular acquisitions online the responses were: clothing and accessories (58%), electronics (47%), books, movies and music (44%), gadgets, smartphones and tablets (42%). According to the users the eCommerce sector will be dominated by electronics purchases, but some categories will notice a decrease: clothing and accessories (-18%), computer and hardware (-11%), movies, books and music (-7%).

The most popular payment method in the eCommerce in Romania is the payment upon delivery (4 out of 5 users prefer this method). They prefer this in comparison to bank transfers, card payments or mobile payments. From the point of view of money spent online, the average "basket" has a value of 470 lei (105euro), while the annual money spent by a single user, can reach 2260 lei (505euro).

The most used websites for online purchases in Romania were eMag.ro, on second place OLX.ro and on the third place Tocmai.ro. These are websites that sell mostly electronics.

The study was conducted on 1200 respondents. It was adjusted according to sex, age, city and education. The study is relevant for people older than 15. The data was collected between the 8th of August – 3rd of September 2014, and for the questioning, it was used pop-up questionnaire CAWI.

HOW ROMANIANS BUY FROM IKEA

48%

of Romanians get informed online, before visiting the IKEA store

15%

of customers test products in store and afterwards buy them online

7%

of sales are made online, after one year of launching the online shop

21%

would prefer to get both information and also buy online, without visiting the IKEA store

10X

less visitors on the online shop, than the IKEA store

source: Marketing Dept. IKEA Romania

The IKEA clients seem to love good taste and what is beautiful. As I stated before, Romanians are picky and look attentively to get a good price-quality ratio on the products they buy. Keeping In mind that 90% of Romanians are owners of the homes they live in, they consider buying furniture an investment in the lifestyle that they want to have. However, the crisis has put a toll on the amount of money people are willing to pay.

IKEA Romania pays great attention at the trends in Romanians' behavior when buying furniture. Cornel oprisan, the general director of IKEA Romania, stated that before the crisis Romanians used to change the big pieces of furniture in their homes once every 7/8 years. Now he forecast that the Romanian customer will change his furniture every 15 years. His estimation is based on surveys that the customers take in the store.

Another trend that they noticed is the fact that customers buy now more kitchen wear: from furniture to plates, as they prefer to plan dinner parties at home, and reduce the money they spend going out in the town.

Another example in the behavior of the Romanian consumer when buying furniture is that now he is aware by the fact that it is very difficult financially to change his hoe, so he prefers to invest in his existing one.



CONCEPT PROPOSAL

CASE STUDIES - TEMPORARY SOLUTIONS



A temporary retail solution can be defined by temporary retail, flash retailing, pop-up store, or pop-up shop. Pop-up retails represent the use of a physical space for a temporary period. This action generates long term, lasting experiences for customers. A temporary retail solution allows the brand to communicate to the customers its most important values, by engaging them in a unique and physical environment, creating an immersive shopping experience. Pop-up shops are taking over the retail world and rethinking traditional brick-and-mortar and big-box stores.

They have been launched since the 1990s in large urban cities such as Tokyo, London, Los Angeles and New York City. This temporary retail spaces sell merchandise of any kind. Every consumer product has been sold via a pop-up shop at one point in time. Pop-ups are exciting because they create short-term stores that are creative and engaging. They come in all shapes and sizes.

1. #IKEATEMPORARY

IKEA opened a temporary shop to explore the future in sustainable kitchen concepts at the Salone Internazionale del Mobile 2015. Located in Via Vigevano 18, the concept kitchen captures the brand's passion for making domestic living as easy, design conscious, and environmentally conscious as possible.

IKEA's new slogan "There is so much more to food than food" is the fundamental concept behind the brand's ingenious designs at their temporary shop. The exhibit's sustainable approach towards food preparation and enjoyment was inspired by the upcoming 2015 Expo's theme "Feeding the planet, energy for life." The IKEA shop design emulates the warmth, activities, and feel of kitchens, but also has added elements to encourage people to respect the environment and adopt a sustainable lifestyle.

For this special temporary exhibit, IKEA asked several designers to reinterpret their new kitchen collection METOD and follow the theme "total kitchen freedom" to maximize the variety of mindful designs.

WHAT HAPPENED AT #IKEATEMPORARY:

1. Educate new customers

The mission of IKEA Temporary Shop was to introduce people to the cooking methods of the future. They also presented how to consume more ecological and how to make the best out of small spaces. They used designer installations to send this message to visitors.

2. IKEA Shop

Customers were able to shop on the spot small items from IKEA. The items selected for the hop were kitchenware and food. For this, IKEA had traditional check out, but also provided customers with a self-check out area, to stay in the self-service theme of IKEA.

3.New product launch

It was introduced to the public the capsule home ware collection, designed by Ilse Crawford. This collection will release the summer 2015. IKEA wants to bring to the customer a range of induction-charging furniture and lighting.

4.Food Workshops

In the basement of the temporary store, there were show cookings, where people could learn how to prepare traditional Swedish meals. IKEA Invited professional chefs to present and showcase the food.

5.EXPO 2015

IKEA has collaborated with designers to create kitchen installations focused on children, disabled people and the future of cooking at the pop-up space in Milan. The temporary store was in theme with the 2015 EXPO in Milan, as

it was focused around the way we will eat in the future.

6.Prototypes

A Prototype for Concept Kitchen 2025 was presented in the temporary shop. This is collaboration with IDEO and students from universities in Lund and Eindhoven to generate ideas about how we will cook in ten years time. They focused on how technology, space restrictions and eating habits in the future will affect our kitchen routines.



Photos #IKEATEMPORARY



Photos #IKEATEMPORARY

2. BERLIN SHOW HOME

Interior designer Sarah Van Peteghem dressed this Berlin show home with monochrome paintwork, assorted plants and furniture by local design brand New Tendency. Van Peteghem, author of interior style blog Coco Lapine Design, was asked by Berlin estate agents Fantastic Frank to style a turn of the century flat in Schoeneberg, Berlin. She chose to champion local design, selecting furniture and fittings predominantly from New Tendency – after which the New Tendency apartment is named – alongside pieces from other Berlin-based and Scandinavian designers.



Photos Berlin Show Home



Photos Berlin Show Home

CONTEXT

IKEA Romania has only one available location in the country. There is a huge opportunity for them to reach other cities and raise brand awareness among other customers. Because it is very expensive and time consuming for a big brand like IKEA to open a new flagship store, I propose as a solution a temporary retail location. Given the fact that IKEA aims at improving people's homes, a good way for them to showcase products and sell them would be through temporary showcase homes. This way the cost of space would be less, and they get the possibility to test the market beforehand, limiting any possible risks. I propose a couple of apartments rented and designed by IKEA specialists, showcasing different types of homes. People can touch and feel, place orders for big items, buy small decorations and food on the spot, and get familiar with the new IKEA innovations.

CONCEPT - IKEA TEMPORARY HOME

WHAT IS IKEA TEMPORARY HOME:

It is a temporary marketing solution, that aims to bring IKEA products closer to customers. The service functions by opening temporary shops in rented apartments in big cities of Romania.

WHO DOES THE SERVICE ADDRESS:

The temporary shops/showrooms are aimed at the public that can't reach easily IKEA. It will be present in cities located approx. 300km or more from Bucharest. This way IKEA provides an innovative shopping experience for the customers that can't come to Bucharest.

WHY IS IT DONE:

IKEA Temporary Home aims to connect with customers from all over the country and penetrate the market as the leading furniture company in Romania. It also provides them with a research tool to test the market, before opening a new flagship store.

HOW DOES IT WORK:

IKEA Temporary Home will arrive in selected cities around Romania and function for a certain amount of months. The temporary shops will consist of 5 types of apartments, so that customers' needs can be met according to the type of home they plan to shop for. Customers can visit the apartments, buy small items and IKEA Food and place orders for big items. They will receive special offers on transportation and on products displayed in the "homes". After a certain amount of time the apartments will be redesigned by the IKEA interior designers and new IKEA products will be available for purchase.

SERVICE MATRIX:

Physical Evidence or Communication Channels	ADVERTISING TV RADIO ONLINE FLYERS BANNERS	SIGNS AT THE ENTRANCE	IKEA PRODUCTS DIFFERENT TYPES OF ROOMS	IKEA PRODUCTS DIFFERENT TYPES OF ROOMS CASHIER INFO DESK	ORDER PAPERWORK INVOICE INSTRUCTIONS	IKEA CATALOGUES ADS NEWSLETTERS	NEW ADS NEW IKEA ITEMS NEW APT DESIGN
Customer Actions	SEE ADS GET INFORMED	GO INTO THE APT	VISIT THE ROOMS OF THE APT. TOUCH&FEEL GET INFORMED ABOUT PRODUCTS	PLACE ORDER FOR BIG ITEMS BUY IN-STORE SMALL DECO.&FOOD	GO HOME ENJOY IKEA PRODUCTS WAIT FOR ORDER TO COME	TELL FRIENDS AND FAMILY	VISIT IKEA APT. TO SEE NEW PROD- UCTS
Front-line Staff Actions	MAKE SURE INFO GETS TO THE AUDIENCE	WELCOME CUSTOMERS EXPLAIN CONCEPT	ANSWER TO QUESTIONS PRESENT DISCOUNTS AND BENEFITS	PLACE ORDERS CASH ITEMS GIVE INFO.	PLACE ORDERS CASH ITEMS		MAKE SURE INFO GETS TO AUDIENCE PROMOTE NEW PRODUCTS
Behind-the-Scenes Staff Actions	BULID FUTNITURE DESIGN APTS. HIRE PERSONEL PREPARE STOCK ORGANIZE EVENTS	MAKE SURE ITEMS ARE DISPLAYED GOOD INFO MATERIAL IS ENOUGH	PLACE BROCHURES AND OFFERS ARRANGE ITEMS AFTER CLIENTS TEST THEM	SEND ORDERS TO THE DELIVERY SERVICE RESTOCK SHELVES SEND SALES REPORTS	SEND ORDERS TO THE DELIVERY SERVICE RESTOCK SHELVES SEND SALES REPORTS	PROMOTE IKEA VALUES THROUGH PRINT ADS AND MEDIA	REDESIGN APTS CHECK STOCK SEND IN ANALYSE AND REPORTS AFTER 1ST MONTH
Support Systems and Infrastructure	MEDIA AND INTERNET	ADVERTISING AND SIGNAGE		CASHIER SYSTEM ORDERING SYSTEM DELIVERY SYSTEM	CASHIER SYSTEM ORDERING SYSTEM DELIVERY SYSTEM	MEDIA AND INTERNET ADS EVENTS WORKSHOPS	REPORTS ORDERING SYSTEM TRASPORTATION

fig. 07 - IKEA Temporary Home service matrix

IKEA Temporary Home System Map

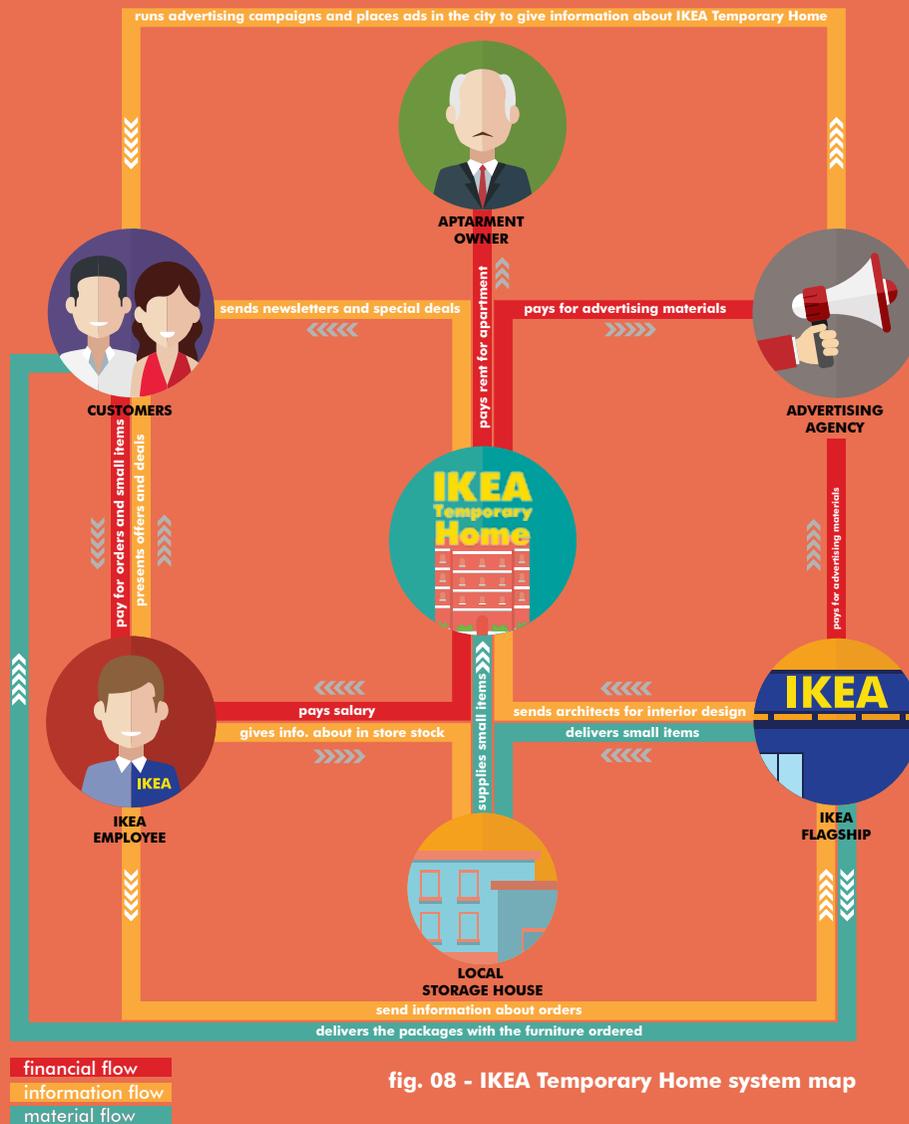


fig. 08 - IKEA Temporary Home system map

IKEA Temporary House will run as a common connector between all the actors of the service. For it to function it is very important for IKEA to use advertising agency to promote the pop-up stores before they reach a certain city. It is also important for IKEA to set up a local storage house and provide it with small items and IKEA food, for the in store purchases in every apartment. IKEA will also have to hire personnel that will provide information and assistance with orders in every apartment. The apartments will be rented from local owners on a temporary contract. The customers will interact with the IKEA Temporary Homes and the professional employees in each apartment. They will buy small items and food from the IKEA Temporary Homes, but the big furniture items, will come by order from IKEA store in Bucharest.

IKEA TEMPORARY HOME TIMELINE



fig. 09 - IKEA Temporary Home timeline diagram

Before IKEA Temporary Home arrives in a city, there will be some teasing advertisements launched. This will happen between 2 weeks and 2 months before the official launch. The advertising services will include: online campaigns, TV spots and radio

advertisements, banners and flyers. In the meanwhile, the IKEA team will rent the apartments and start to build the furniture that will be showcased. The interior design will be done by IKEA designers. The IKEA team will also hire personnel to work as shop assistants in the apartments. There

will also be sent invites to influential people in every city announcing them the opening day party. On the opening day, IKEA will open the doors for special guests and launch a series of events and workshops that will sustain their values and also promote this temporary concept. In the next week IKEA will hold a series of workshops: How to choose the right color for every room, How to decorate your children's room, How to cook Swedish, etc. During the visits, people can touch and feel the products. This is a very important aspect of the service, as people can experience firsthand the quality of the products before they order them. The IKEA Temporary Homes will run for 1 month and after that, new products will be showcased and the apartments will be redecorated. The service has a cycle aspect, after each redecoration the activities are starting again. People will be able to experience IKEA products and see how they can place them in their homes.

Personas

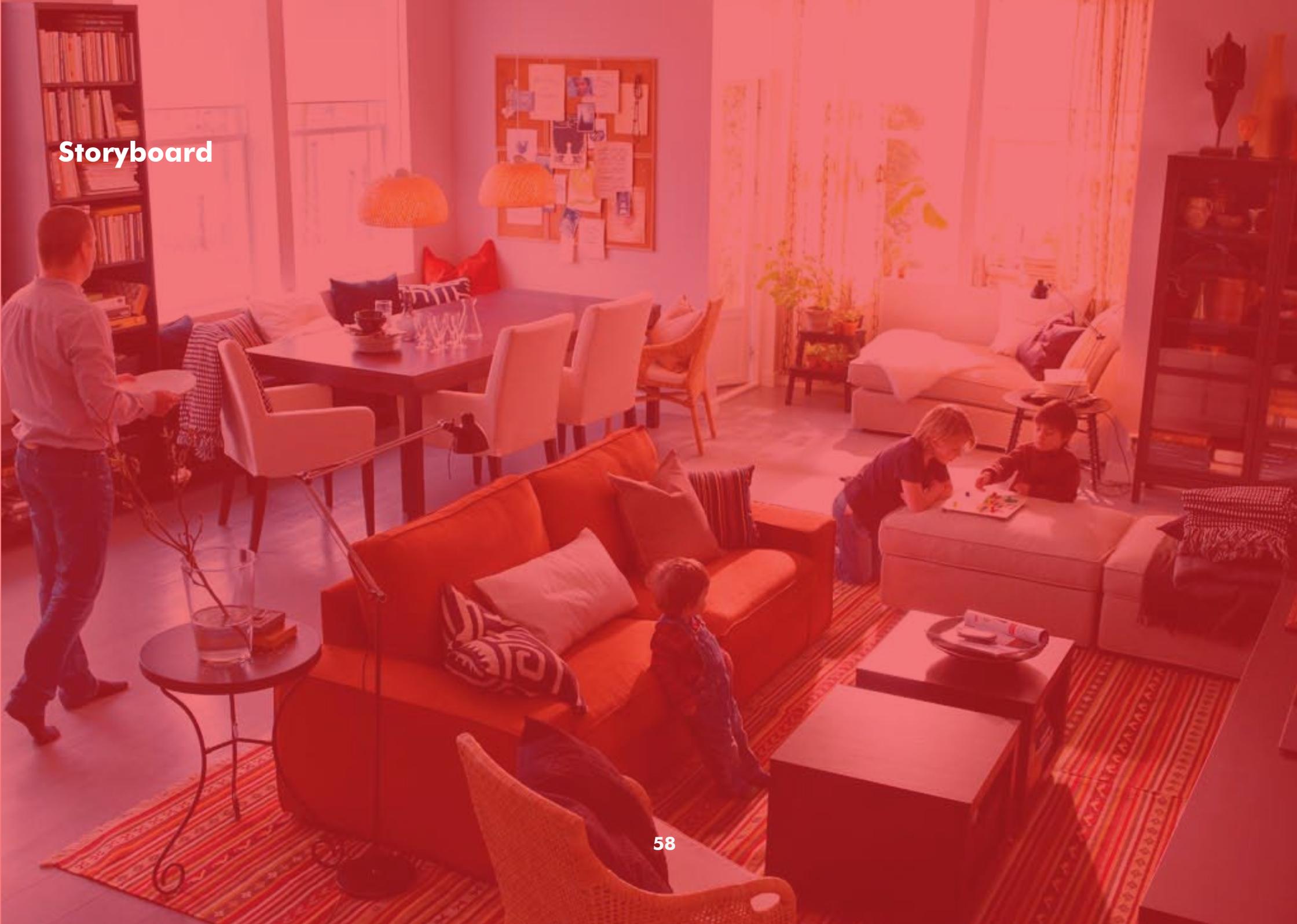


Stefan is a 28 years old IT programmer from Cluj. He has a two bedroom apartment that he furnished using local furniture. He loves IKEA products because they are cheap and the quality is great. He also appreciates the good design. He is one of the few people that ordered online from IKEA. He was not satisfied as the transportation cost was almost half of the sum he spent for the actual furniture. He would love to have other possibilities of buying IKEA products that are both close and convenient.



Claudiu is a 35 years old business man from Cluj. He has two daughters and a lovely wife. His firm is often sending him on business trips in Bucharest. His wife is a big fan of IKEA products, unfortunately because of the heavy schedule, Claudiu doesn't always have the time to shop for his wife at IKEA Bucharest. Sometimes he gets the possibility to take his family on business trips, and his wife's enjoys bringing home new decorations and little furniture items. She would love to shop for larger furniture, but the transportation cost is too high and it is not worth paying.

Storyboard





Stefan finds online the ads and campaigns promoting the IKEA Temporary Home. He gets familiar with the concept. He joins the newsletter to be the first to know when IKEA Temporary Home arrives in Cluj.



He spots ads around the city announcing the period when IKEA Temporary Home arrives in Cluj. He gets excited and starts planning his shopping list.



When IKEA temporary Home Opens, he goes to a two bedroom apartment home. He spots the big signs from far away, so he knows he is in the right place.



Stefan enters the IKEA Temporary home and as he visits every room, he stops in the kitchen. He wants to remodel his kitchen and like the IKEA proposal.



He asks the IKEA personnel more about the offers and the delivery possibilities. As he discovers he gets a special price for the delivery cost and for placing an order in the IKEA Temporary Home, he decides to place an order for new kitchen furniture.



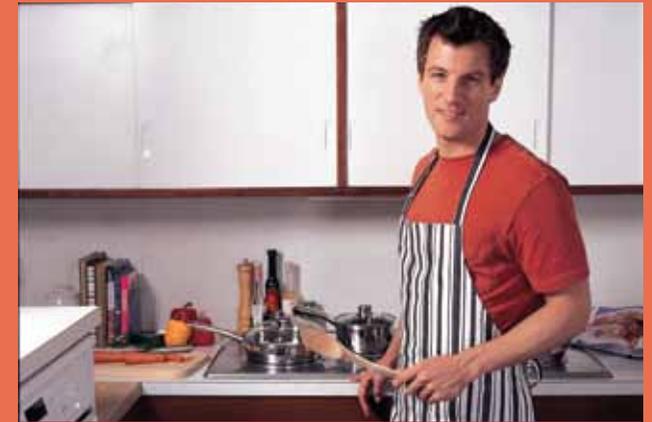
He notices an area with IKEA Food products. He always wanted to try them, so he buys a couple of things that he plans to enjoy when he arrives at his home.



He returns home and waits for the order to be delivered at his home. The order arrives in 5 days.

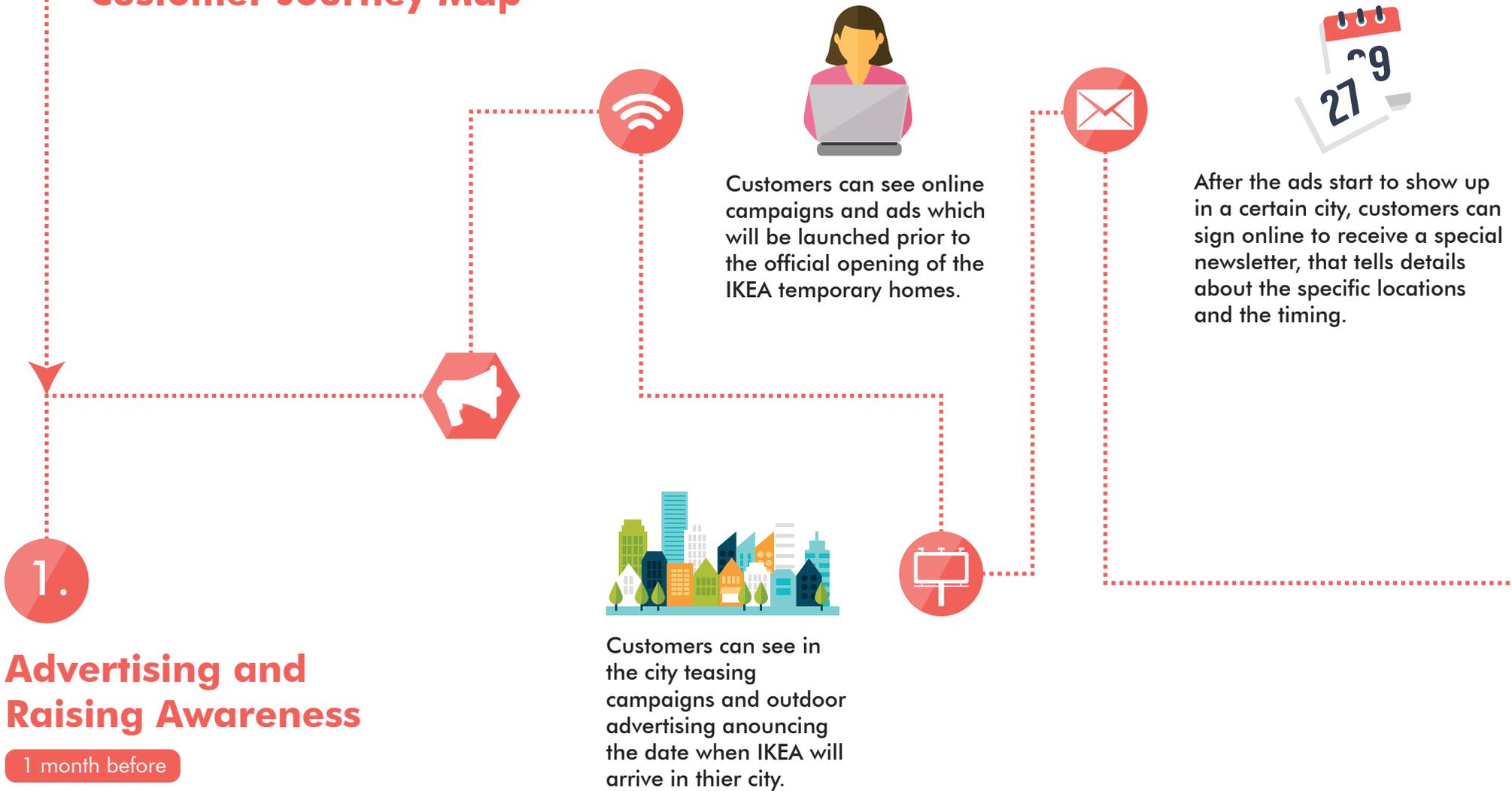


As he paid extra, the IKEA handyman build the new kitchen furniture for him.



Stefan enjoys his new kitchen and plans on going back again to the IKEA Temporary Home as he wants to redesign his bathroom as well.

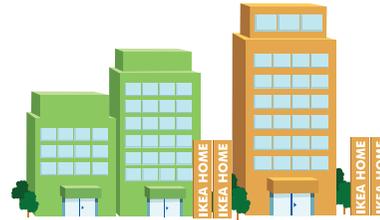
Customer Journey Map



2.

Opening the IKEA Temporary Homes

runs between 1 month - 2 months



Customers can visit the IKEA Temporary Homes according to the type of apartments they want to visit. Each location will have signs outside to signal the IKEA Temporary Home.



Customers are welcomed inside the IKEA Temporary Homes. They can see different size homes and how they can decorate them using IKEA furniture and accessories.



Customers can find out about special offers and sales available in the IKEA Temporary Homes from the personnel.



Customers can buy on location in each IKEA Temporary Home small furniture items, decorations and IKEA Food products.



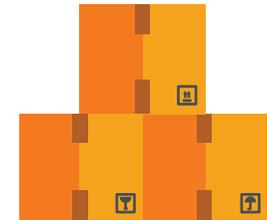


Customers can place in the IKEA Temporary Home orders for the larger furniture items displayed and get special discounts for the delivery cost.

3.

Delivering orders and meeting customer needs

during the 1 month - 2months



Customers wait between 1 and 2 weeks (depending on the order) for the packages to arrive at their homes.



After they receive the order, customers can build the furniture and enjoy it in their homes. If they payed for extra service, an IKEA handyman will build the furniture for them.



4.

Revisits and new furniture

after the 1 month - 2months

During the 1/2 months period, customers can visit the IKEA Temporary Homes as much as they want. But after this period IKEA will redecorate the homes and introduce new ways of designing homes and making available new items for on location purchase. This will be a result of analysis of the sales and the customers' desires.



fig. 10 - IKEA Temporary Home customer journey map

Types of IKEA Temporary Home Apartments

The cities where IKEA Temporary Home will rent apartments:



B Bucuresti - the only city with an IKEA store
Pop. - 1.920.610

BV Brasov - IKEA Romania is considering opening the next shop in Brasov
Pop. - 275.514

TM Timisoara - untapped market
Pop. - 306.462

CJ Cluj - recorded the most expensive online order, because of the cost of delivery
Pop. - 303.047

IS Iasi - untapped market
Pop. - 318.871

fig. 11 - IKEA Temporary Home cities



STUDIO APARTMENT
160 - 500 euro/month



Showcase - small house:
kitchen bedroom
bathroom decorations
storage terrace



2 ROOMS APARTMENT
140 - 350 euro/month



Showcase - young couple house:
kitchen main bedroom
decorations small bathroom
storage big bathroom
terrace



3 ROOMS APARTMENT
290 - 400 euro/month



Showcase - family house:
kitchen main bedroom
kids room small bathroom
storage big bathroom
terrace decorations



**4 ROOMS APARTMENT
600 - 1000 euro/month**



- Showcase - big family house:
- kitchen main bedroom
- kids room small bathroom
- home office big bathroom
- storage decorations
- terrace



PENTHOUSE
800 - 1200 euro/month



- Showcase - family penthouse:
- kitchen
 - main bedroom
 - kids room
 - small bathroom
 - storage
 - big bathroom
 - big terrace
 - decorations



CONCLUSION

Possible Outcomes of IKEA Temporary Home

1. Test a New Revenue Stream

By opening these pop-up shops IKEA will save money. The apartments will provide a low-cost way to explore the possibility of adding an additional revenue stream. This is much cheaper than spending money for an actual physical retail location.

2. Engage Customers Offline

Not being able to try a product before purchasing can be a low point in a business. People love to be able to physically touch a product before they buy it. For IKEA this one of the most important aspects of the shopping experience they provide to their customers. To bring the products closer to people, so they can touch and feels them could be a huge game changer for IKEA sales, both in the store and for the online shop. To support this idea, a study by Accenture showed that 78% of shoppers are "webrooming" (browsing online, then purchasing in a store) today.

3. Create “Get It While It Lasts” Urgency

Because the IKEA Temporary Home will be opened only for a limited amount of time customers will only have a certain amount of time to engage with a brand and purchase the products on special deals and offers. Scarcity drives action through customers wanting exclusive, limited edition, or other products they can't get otherwise, and a pop-up shop offers you this advantage.

4. Educate New Customers

IKEA Temporary Home can be a great opportunity for IKEA to present to the customers their new line on innovative products, like the collection of induction-charging furniture. This will mean that IKEA can bring to the public a new product that hasn't crossed over into the mass consumer subconscious, and it will help them understand how the existing marketing collateral performs with actual customers while getting real-time feedback on how it can be

improved. It can also provide pre-orders before starting to mass produce the items. Giving potential customers a live demo or walking them through how the product works is a great way to get through to those early adopters.

5. Go to Where Customers Are

This is one of the most important advantages of a temporary retail solution. The benefit of being able to select a certain vacant space is that IKEA can match its products with the personality of a given demographic and go to where they go.

7. Generate Brand Awareness

Having a one-two punch approach is very important in the retail sector nowadays, especially as many brands are starting to have an omni-channel presence. By engaging prospective customers offline and delighting them with an unforgettable experience and quality products, IKEA can then point them to the online site and

social accounts, where they can stay in touch and continue to buy the products. The IKEA Temporary Home will also assure that IKEA's presence on the Romanian market will have a great impact. This will result in higher number of sales and generate a possible leading position on the Romanian furniture market.

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PHOTOS AND ILLUSTRATIONS

LIST OF PHOTOS:

front cover | background photo | <https://sergiuconstantinescuphotography.wordpress.com>

pp.02-03 | background photo | <https://commons.wikimedia.org>

p.06 | background photo | <http://jurnalmm.ro>

p.07 | background photo | <http://www.click.ro>

p.09 | traditional Romanian house interior images | <http://www.amalr.ro>

p.10 | background photo | <http://www.szekelyhon.ro>

p.12 | background photo | <http://www.cherestea-brasov.ro>

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