## PART ONE: MANAGING MARKET COMPLEXITIES

# Introduction

### Missing the target

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On the morning of 18 March 2013, an exuberant yet slightly haggard young man stood before a small group of hastily gathered reporters in the Devonshire Mall in Windsor, Ontario, Canada. Dressed conspicuously in a tan blazer, red tie and red-and-white striped shirt, he had invited the journalists to show off the new Target department store which, it had just been announced, would open the following day.

Founded in 1962, Target is one of the largest retailers in America, trading on the promise of 'Expect More. Pay Less.' On this particular morning, the retail giant was embarking on its first international venture into neighboring Canada. Leading the charge, and the store tour, was a 38-year-old American named Tony Fisher, Target Canada's CEO.

The first three Canadian stores had opened two weeks earlier. The Windsor store was the fourth of a planned 124 Canadian stores to open over the next nine months. Already, it had been a rocky start for Target, and it showed in Mr Fisher's frenetic replies to the reporters' questions about everything from pricing and selection to empty shelves and unannounced openings.

As Tony Fisher began his tour that morning, something extraordinary happened outside. The temperature in Windsor, already at freezing point, plummeted to –18°C (0°F) in a matter of minutes. If a

greater power were trying to give Tony Fisher and his employer a sign, it went unheeded.

Within 14 months, Tony Fisher and the US CEO who hired him would both be fired as a prelude to the announcement on 15 January 2015 that Target would exit Canada altogether. All told, 17,600 employees lost their jobs as Target closed all 133 Canadian locations. According to Canada's *Financial Post*, the misadventure was estimated to have cost Target $5.4 billion CAD ($5.5 billion USD) in pre-tax losses.[1]

*Fortune Magazine* concluded that 'Target failed to entice shoppers in Canada, a country of 36 million people with a way of life similar to Americans' but with habits different enough to make it a potential minefield for US retailers.'[2] As a primer on why brands fail abroad, Target Canada is a textbook example.

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## Success as a foregone conclusion

Target's ill-fated launch in Canada has become a staple in any discussion of international marketing. This is partly because of how completely the endeavour failed, but mostly because it was so unexpected.

On paper, Target seemed to have everything in its favour. To start, Target's birthplace and headquarters is in Minneapolis, Minnesota, just 360 kilometres (225 miles) from the Canadian border. It had a 50-year track record of sound business and, specifically, marketing decisions. With annual revenues topping $70 billion USD, Target had grown steadily across the US, becoming the second-largest discount retailer behind Walmart. The company demonstrated a deep understanding of its shoppers and impressive business acumen. With over 1,800 US stores, it was estimated that 75 per cent of the US population lived within 10 miles of a Target. It is understandable that it would consider expanding outside its home market.

Prior to 2011, Target had expressed interest in global expansion. Its main US rival, Walmart, had done so with stores spanning North and South America, Asia, Africa and Europe. Starting in Canada must have seemed like an easy first step for Target.

Target's value proposition of a large selection at low prices seems like it would travel well. And it wasn't as if Canadians needed to be educated about the Target brand. About three-quarters of the entire Canadian population live just 160 kilometres (100 miles) from the US border. As a consequence, almost 10 per cent of the Canadian population were already regular Target shoppers and many more knew of the brand. A survey conducted about eight months before Target's Canadian launch showed that 83 per cent of Canadian shoppers were aware of the Target brand and four in five expressed an interest in shopping there.[3]

It's uncommon for a brand to enter a foreign market with the advantages Target possessed. So how did things wind up going so poorly? The complete list of factors that have been attributed to Target's failure in Canada is extensive. An overview of the top five reasons may give the flavour.

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## Compromised values

The whole foray seems to have been triggered by a real estate deal. Target had been eying Canada for years, but had rejected the idea of gradually building up stores in Canada. It wanted to enter with a national presence all at once. However, the amount of retail-friendly real estate required to do that in Canada is hard to come by. So when Target was given the opportunity to compete with Walmart in bidding for 220 leases across Canada from Zellers Inc (a failing Canadian discount retailer), it saw a clear opportunity to pursue its international ambitions. Seventeen years earlier, Target's rival Walmart got its start in Canada when it purchased 122 stores from the Woolco division of Woolworth Canada.

Ironically, Zellers also had a similar start in 1931 when it took over the stores of the faltering US retailer Schulte-United. Zellers was more downmarket than Target, but unfortunately had adopted the same red-and-white corporate colour scheme. The Zellers stores were about half the size of Target stores, and many of them were located in areas that bore little resemblance to where Target situated its US

stores.[4] Despite all this, on 13 January 2011 Target's CEO Gregg Steinhafel paid CAD $1.825 billion for the leases after Walmart passed on the deal.[5]

Once the leases were purchased, the clock was ticking. Steinhafel had committed the company to opening stores as quickly as possible to avoid paying rent on empty retail space. This resulted in the very ambitious plan to open 124 stores by the end of 2013 and to be profitable within its first year of operations. It took Target almost 20 years to reach 124 stores in the US. In Canada they gave themselves half as many months to do the same.

If there was one decision that sealed Target's fate in Canada, it wasn't that of purchasing the over-priced leases; it was the subsequent decision to, at all costs, avoid paying rent on vacant retail space. That priority overrode Target's core business strategy and brand values, expressed in the company's tag line 'Expect More. Pay Less.' The Target US brand had built enormous success with a single-minded mission: To provide an unequalled discount shopping experience to its guests. In allowing short-term financial goals to eclipse the company's core values in Canada, Target unwittingly neutralized its only competitive advantage there. This is a good example of 'be careful what you wish for': Target got 124 stores open at all costs – a cost that included their customers and business.

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Abandoning the corporate mission in pursuit of a financial objective in Canada was a seismic shift in corporate ethos for Target. No one ever came out and said as much, but they didn't need to. It manifested itself in four years of myopic dedication to opening stores no matter what type of shopping experience they offered guests. Although Tony Fisher and others dutifully recounted the corporate line about putting shoppers first, it was clear that their focus was elsewhere – simply getting the stores to a minimally viable state so they could be opened.

Just three weeks after the Canadian launch, Tony Fisher spoke at the Canadian Club in Toronto. His speech provides insight into the organization's priorities in Canada. He said, 'Speed has been at the essence since we started this process because it was important to get stores open as quickly as possible so we could start providing a return

on Target's investment.' He went on to say that one consequence of speed was, 'We knew from the beginning we wouldn't be perfect immediately, but our minimum expectation was to be very good.' Mr Fisher admitted that providing a customer experience that was not up to Target's usual standards was hard to get used to, but felt it was the best approach for Canada. Most of his 30-minute speech focused on the operational challenges of opening so many stores in so little time. Fretting over the finer points of shopper experience is a luxury when you're wrestling with the nuts and bolts of building basic supply chain infrastructure.

The moment the Canadian organization prioritized opening stores ahead of delighting customers, the Canadian brand entered new territory veering sharply away from the American brand values and blazing its own path in Canada.

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## Technical difficulties

Modern retail depends on the interaction of many software systems to ensure an uninterrupted supply chain and positive customer experience. In the US, Target had developed its own proprietary software to order products from vendors, process them through warehouses, and get them onto store shelves in a timely manner. This system had been refined over decades and worked well in the US. But the system was never set up to work internationally. For instance, it was incapable of dealing with different currencies and languages. Given the ambitious deadline, there would not be time to adapt the system, so Target thought it could save time by buying new 'off the shelf' supply chain software for its Canadian operations.

Of course, the system had to be adapted to Target's needs, manually populated with data on 75,000 items, and integrated with all Target's other systems and processes – to say nothing of training. This would have been a challenge under any circumstance, but in this case no one in the organization had experience of using this new software. As a result, many mistakes were made. Product dimensions were entered in the wrong order, so height was mistaken for width or

depth. Inches were used, which the system interpreted as centimetres. Items were entered with the wrong currencies, and much information was simply missing altogether. As a result, about 70 per cent of the data in the Canadian system was deemed erroneous compared to the typical 1–2 per cent in the US system.

The operational consequence of these mistakes was a highly dysfunctional supply chain. Joe Castaldo of *Canadian Business* magazine interviewed almost 30 former Target employees after the closure. His article, 'The last days of Target',[6] provides an insightful, behind-the-scenes look at what went wrong. Castaldo summarizes the supply chain woes the company suffered from the moment it tried placing orders through its new supply chain software:

> Items with long lead times coming from overseas were stalled – products weren't fitting into shipping containers as expected, or tariff codes were missing or incomplete. Merchandise that made it to a distribution centre couldn't be processed for shipping to a store. Other items weren't able to fit properly onto store shelves. What appeared to be isolated fires quickly became a raging inferno threatening to destroy the company's supply chain.[7]

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Castaldo chronicles how other systems suffered a similar fate. Due to supply chain woes, bare shelves were the norm in Target Canada stores. This shocked consumers and was widely publicized in the press and on social media. At the same time, Target's Canadian distribution centres were overflowing with products to the point where additional warehousing needed to be secured. That's because another software system that controlled forecasting and replenishment of the distribution centres filled them with far more products than were needed. It turned out that this new software required years of historical data to operate properly. Unlike the US stores, the Canadian stores had no historical sales data for the software to effectively run its algorithms.

Yet another system that controlled point-of-sale functions was also purchased having never been adequately vetted or trialled. It too was a disaster. Self-checkout returned the wrong change and the system would frequently freeze or provide the wrong price. Sometimes a

transaction would appear to go through, but after the customer had left with their purchases, the payment would fail to process and the entire transaction would be invalidated.

## Price perception

Low prices are at the core of Target's offer and the 'Expect More. Pay Less.' promise the brand made to Canadians for two years building up to the 2013 launch. In fairness to Target, it did deliver. Several price surveys found its prices, on average, to be on par with other local discount retailers like Walmart. But the public didn't see it that way.

Target's prices in Canada were noticeably higher than in the US. Since many Canadians shop at Target in the US, they compared prices to the US stores. Given the price disparity, Canadian shoppers concluded that Target had abandoned its low-price promise in Canada. The disappointment of the Canadian shoppers seems to have coloured their view of the Target brand in general. Even though Target's prices were competitive in Canada, consumers perceived the prices to be higher than those of other discount retailers in the Canadian market.

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From day one, Target had been hammered by the press and social media on the topic of price. In response, Target's Canadian CEO cited the facts:

> Transportation costs are higher, distribution costs are higher, fuel costs are higher, wage rates vary across the country, the tax rates are different, cost of goods are different, the duties – I think the scale we have here in Canada is quite different from the incredibly different, densely populated US marketplace.[8]

The problem was that you didn't need to open a store in Canada to know these things. Price disparity between the US and Canada and its causes had been an issue in Canada for years. In fact, just a few weeks earlier, Canada's largest daily newspaper had run a story on the topic citing how Canadians felt 'ripped off' by higher retail prices in Canada.[9] The story cites a Bank of Montreal study from 2012,

which found that, on average, Canadian retail prices run 14 per cent higher than in the US for many of the reasons Tony Fisher mentioned.

On 30 October 2013, almost eight months after Target's launch in Canada, Tony Fisher and Target's US CEO, Gregg Steinhafel, spoke with analysts in Toronto. They had to account for lower than expected performance and admitted that they were struggling to change consumer behaviour in Canada. Despite consumer outcry, he maintained that Target Canada's prices were competitive with Walmart and didn't need to change. Holly Shaw, a reporter for Canada's *Financial Post*, captured Steinhafel's assessment:

> 'We are right on where we need to be here in Canada,' Mr Steinhafel said, adding that trying to compare prices at Target Canada with that of certain Target stores in the US 'would be like comparing prices in Boston to prices in rural Iowa. There are wide price variances between different US markets, he added. 'We focus on being priced properly in each and every trade area that we operate in, [and] the same approach holds true in Canada.'[10]

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What Mr Steinhafel is saying here, essentially, is that the Canadian consumer's price perception problem is illogical and therefore he will continue to follow Target's logical US pricing policy, no matter what. But consumers have their own logic that, right or wrong, dictates their purchase decisions. Marketers need to look beyond their market constructs and assumptions and see the world the way their customers do. This was second nature for Gregg Steinhafel in the US, where he had proven himself adroit at understanding the perspective of the American shopper.

The way that Mr Steinhafel defined 'trade areas' seems based on a top-down, US-centric view of the market. Canadian consumer behaviour dictates their 'shopping areas', which in many instances violate the boundaries of Target's trade areas. Shoppers in Windsor can just drive to the next town, Detroit in the US, to shop in that trade area. That tendency of Canadians to shop outside the lines of Target's preconceived trade zones was recognized by Target's executives. But that recognition was limited to the positive effects that cross-border shopping had on brand awareness and image in Canada. What Target

overlooked, at its peril, were the glaring brand-perception challenges that such shoppers would pose for the company were it to venture across the border.

Shaw reports that Target 'did not anticipate consumers would expect the retailer to match its US pricing, leading to some alienation and confusion'. Yet this was not difficult to see in advance. In fact, a report published in the summer of 2012 by the Canadian market research firm Vision Critical flagged the issue outright.[11] Its survey of over 1,000 Canadian consumers found that Target's tagline, 'Expect More. Pay Less.' was fuelling excitement for low prices among 70 per cent of shoppers. The study concluded:

> While two-thirds (65 per cent) of Canadians believe the shopping experience at Target Canada will be comparable to the US, it's paramount that Target be prepared to explain any potential major differences in pricing and promotions to Canadian shoppers to proactively avoid disappointment.[12]

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The same company surveyed 1,500 Canadian shoppers in 2015 and found that a whopping 89 per cent of Canadians felt Target failed to deliver on its promise 'Expect more. Pay less.' These types of local consumer insights are not difficult to find, but you have to first see the value in going out and looking for them. You will not find them in typical market analysis reports written from a 10,000-metre (30,000 foot) perspective.

## Adapting to the market

Target also seemed to enter Canada determined to change the market rather than adapt to it. It expected Canadian shoppers to conform to its needs with regard to pricing, locations, selection and shopping behaviour.

For instance, Canadian shoppers tend to cherry-pick from the perceived strengths of different stores depending on what they needed to buy. So, they may pick up household staples at Walmart, beauty and healthcare items at Shoppers Drug Mart and groceries at Loblaw.

Seventeen years of prodding from the world's one-stop-shopping leader Walmart had not changed this habit. Yet part of Target's plan was to make itself a one-stop-shopping destination in Canada. About eight months after launch, Mr Fisher explained, 'This requires us to redefine the perception of what a trip to Target means, so we can fundamentally change habits in a market where consumers are accustomed to visiting many other competitors to accomplish all of their shopping.'[13] This is the antithesis of marketing. Expecting foreign buyers to adapt their priorities and behaviour to suit your brand is not realistic. In this case, it's made more absurd because, at that point, Target wasn't offering enough perceived value to move people into their stores, much less move the entire market's shopping behaviour.

The fact that Target said it was struggling to change Canadian shopping habits in the October 2013 analysts meeting is telling. Tony Fisher described how Target's business model was fine-tuned to compete in the American retail environment by adapting itself to the needs and habits of the American shopper. Target entered the Canadian retail environment with this same US-centric business model apparently expecting the Canadian shoppers to adapt to it. The organization said it was surprised to learn that Canadian shoppers expected the same prices as they received in the US when this was, quite literally, public knowledge. Having made the realization, management claimed the fault lay with the Canadian consumer's expectations, not their strategy. At the analyst's meeting, Steinhafel delivered his message in Canada on behalf of a Canadian corporation to a Canadian audience, but did so from an entirely US perspective, right down to his choice of Boston and Iowa as examples. This behaviour is consistent with an organization that has not yet mastered the skill of seeing the world from the perspective of its foreign buyers and then adapting to their perspective.

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Nine months after announcing its exit from Canada, Target re-entered the Canadian market in October 2015, this time with a Canadian version of its website to encourage online shopping. The news was met with enthusiasm by Canadians – until they tried to shop on the site. Unlike domestic orders made from the US site, there were stiff shipping charges and duties in Canada. The result is that an

item like a $25 CAD blanket cost the Canadian online shopper almost $70 CAD after shipping and duties were added. Predictably, this was met with outrage by the Canadian press and shoppers. The Canadian Broadcasting Corporation ran the headline 'Target now shipping to Canada, but shoppers dismayed by cost'.[14] Ironically, the site's homepage proclaimed 'We Love Canada.' This online shopping experience further reinforced the notion that Target struggled to see the world from the perspective of the Canadian shopper.

## Under-estimated competition

When your corporate tag line is 'Expect More. Pay Less.' you create certain expectations on which you need to be prepared to compete. Target was not properly prepared when it came to Canada.

Of course, Target knew it needed to offer low prices and a wide selection. But 'low' and 'wide' are relative terms. 'Low and wide compared to what?' is what a marketer should ask. And the only person whose answer matters is the consumer's.

Target Canada was the victim of fierce competition against one of the world's most savvy marketers. Had Target questioned its own assumptions about the market and invested more time in understanding the Canadian consumer, then it could have easily identified the competitive challenges that ultimately led to its demise and created strategies to deal with them.

The savvy competitor that Target Canada never acknowledged was not Walmart. It was Target US. From the start, Canadian consumers were not comparing Target's prices to other local discount retailers. They were comparing Target's prices to Target's own prices across the border. That, combined with the chain's core promise 'Expect More. Pay Less.', created a price expectation that Target simply was not able to meet in Canada.

On 26 March 2013, when asked about price disparities with Target US, Mr Fisher replied, 'I still work for Target, we are not trying to compete with ourselves – we want to come in and compete with the retail landscape here.'[15] No doubt that is what Target wanted to do,

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but this fails to take into account the perspective of the local target audience. Despite what Target wanted, Canadian shoppers *did* see Target competing directly with itself. The failure to recognize this and other differences between US and Canadian consumers put Target at odds with its customers.

In several interviews, Target Canada's CEO would remind us that 'I work for Target…' and then describe the situation from that perspective. That mindset, on its own, accounts for a lot of Target's poor decisions in Canada. As he presented the new Windsor store to reporters on that chilly March morning in 2013, something Tony Fisher said stuck with me. When asked if it mattered to him whether shoppers visited this new store or hopped over the border to shop at Target in the US he replied, 'This is nothing against the Windsor market, but I work for Target, and I think for me whether they shop in our Target US stores or Target Canadian stores, it's all Target to me.'[16]

It should have mattered to him because it obviously mattered to his shoppers. In the final analysis, Target was competing with itself and lost.

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## What can we learn from this?

Tony Fisher and Gregg Steinhafel were two of the brightest stars at one of the most successful companies in history. They were both accomplished, world-class retailers who got themselves into an impossible situation. Target's Canadian adventure has been cited as a textbook case of how not to enter a foreign market. But I see it as a cautionary tale of how sharp marketers who are skilled, experienced and successful in their home market can go off the rails making rookie mistakes when they venture abroad – even to a neighbouring market with a common language. In the case of Target this was writ large, but I see this same scenario played out every day by equally brilliant marketers as they take businesses large and small across borders.

Hindsight is 20/20, but even so, some of the mistakes Target made would be obvious to a first-semester Master of Business Administration candidate. For perspective, let's go back to 2011 and imagine that

Tony Fisher and Gregg Steinhafel were having a friendly lunch with an executive from a Canadian retail brand that wanted to launch in the US. Assuming they wished her well, would Fisher or Steinhafel condone the Canadian executive's plan to:

- Pay almost $2 billion for sites that were not quite on-brand?
- Commit to open 124 stores in under nine months – an unprecedented launch schedule that no one believed in?
- Put someone in charge who was extremely capable but had no experience in the local market and never opened a single store from scratch on their own, no less 124 at once?
- Decide to keep to the original schedule even after it was discovered that none of the systems that actually run the stores could be functional in time for opening?
- Dissuade shoppers from crossing the border with the promise of 'Expect more. Pay less.' and then provide less selection and higher prices?
- Decide to open stores with empty shelves knowing that they would offer shoppers a truly disappointing, social-media-rant-inducing brand experience?
- Re-enter the market with an online shopping site that proclaimed, 'We Love USA' with prices that were 280 per cent higher than prices they would find in the US bricks-and-mortar shops?

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I think we can safely assume the answer to most, if not all, of the questions above would be a resounding 'No.' No prudent marketer would do any of these things, especially a marketing organization as skilled as Target. Likewise, I doubt that Tony Fisher or Gregg Steinhafel would ever have made these types of blunders in their home market. Which leaves us with a question: Why did these two extremely talented executives do all of the above in Canada?

I hope the answer to this question will present itself throughout the course of this book. But the takeaway here is that if it could happen to Tony Fisher and Target it could happen to you and your brand.

## Preparing for departure

Whether your brand is about to enter a new foreign market or is under-performing abroad, this book will help you. In Part One, we explore how experiences in your home market can blind you to threats and opportunities in new markets and how to adjust your vision for success. It will provide you with insights and a practical framework to help you plan your entry into foreign markets.

Part One addresses the most persistent challenges I see facing companies when marketing abroad. They persist because they are deceptive in their appearance. Adequate preparation, research and planning are things business people do every day. In the case of international marketing, however, these terms belie a level of complexity that most domestic marketers are not prepared, or willing, to embrace. But embrace we must, and the first part of this book will provide some practical advice to deal with that complexity and succeed.

We started the book with the case of US retail giant Target and their ill-fated foray into Canada. This provides a textbook example of how badly things can go wrong – even when you are not taking your brand that far from home. I use Target Canada as a reference case study throughout Part One of this book.

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## Part One overview

How can we prevent the types of problems that led Target astray in Canada? The easy answer is better preparation. In Chapter 1 I explore the paradox of why smart, skilled marketers consistently make rookie mistakes when they leave their home markets. This is a persistent problem. I take the time to define its roots so that you, as a smart person yourself, might avoid the calamitous mistakes made by so many smart marketers before you.

How is marketing internationally any different from marketing domestically? It's difficult to appreciate the extent to which foreign

markets are different from our home market. Our view of foreign markets is skewed by assumptions formed at home. This can obscure obstacles and opportunities alike. In Chapter 2 I list seven of the most relevant differences between marketing domestically and internationally that marketers need to be mindful of when venturing abroad.

What can you do now to mitigate risk and avoid the pitfalls of marketing abroad? We've already identified poor planning as a problem. I don't believe any marketer purposely enters a market unprepared. It's more likely they have the wrong idea about what proper planning looks like. To reduce the ambiguity, in Chapter 3 I discuss the risks involved in entering a foreign market and what a plan to mitigate them look like.

A key decision will be how you organize to succeed abroad. Should you manage things from headquarters? Should you let the local team call the shots? The answer for most companies lies somewhere in between. In Chapter 4, we'll explore different approaches so you can find the set-up that works best for your brand.

How will your brand be understood in foreign markets? Just as important, how well will you understand the market? One of the most obvious differences between foreign markets is language. Adapting your marketing communication to the local language is important. That will get your message understood. Far more challenging is adapting to the local culture. That will get your message believed and trusted. In Chapter 5 and 6 I deal with the dual challenges of working with foreign languages and cultures.

How will you know if you are ready to launch abroad? In Chapter 7 we'll end Part One with some final tips on how to prepare for success. This includes the Eight Inputs Model, which breaks down the elements that shape the marketing mix.

To begin, then, in Chapter 1 I will explore why international marketing makes us more vulnerable to failure and what you can do to ensure success.

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## Notes

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