



SCIREA Journal of Food

<http://www.scirea.org/journal/Food>

March 8, 2021

Volume 4, Issue 1, February 2021

Designing a Greek coffee company's introduction into the US market: Critical marketing factors for a successful penetration in the coffee shop industry

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Abstract

This paper aims to analyze the marketing strategies and the challenges for successful penetration into the coffee shop industry in the United States, the leading coffee consumer in the world. The study, critically reviewing the existing literature and statistics, aims to imprint marketing tools and strategies adopted by the business dominants in the targeted country. It shows how demographics and technology have affected the market, and how the coffee shop industry has succeeded to assimilate the trends. At the same time, qualitative research attempts to recognize possible opportunities and prospects that could allow a successful entrance of a Greek coffee company in this highly competitive environment.

Keywords: Food industry, Coffee Shop Industry, Market Entrance, Marketing Strategies

1. Introduction

Increasing the outward-looking business opportunity and the visibility of Greek businesses and their products on international markets has always been a desirable objective for the development of the economy [1]. A great example of this business extroversion is the Greek coffee shop companies, demonstrating many successful entrances in number of countries abroad, and establishing their presence in competitive environments formed by international leading companies and local coffee cultures.

Designing a Greek coffee company's introduction into the attractive US market of the \$20 billion worth and 150 million consumers, raise many challenges regarding marketing in a landscape dominated by the key players of the US coffee shop industry. Considered as a part of the specialty eatery industry, and driven by the consumer taste and personal income demand, successful marketing depends on the ability to secure prime locations, drive store traffic, and deliver high-quality products. With the major companies having the absolute advantage in purchasing, finance, and marketing, the small or local companies can penetrate effectively the market by offering specialized products, serving locally, or providing superior customer service [2]. However, coffee shop is a service business running the risk of an existing oversupplied market.

This study aims to analyze the marketing strategies and the challenges for a successful penetration into the coffee shop industry in the United States, the primary coffee consumer in the world. The study, critically reviewing the existing literature and statistics, aims to imprint marketing tools and strategies adapted by coffee shop companies in the United States. It will show how demographics and technology have affected the market, and how coffee shop industry has succeeded to assimilate the trends, considering the affection of the directly relevant coffee and food industries. At the same time, through a comparative research, it will attempt to outline the challenges faced by successful independent coffee shop companies in the US in comparison with Greek coffee shop companies' foreign presence, recognizing possible opportunities and prospects that could allow a successful entrance of a Greek company into the US competitive environment.

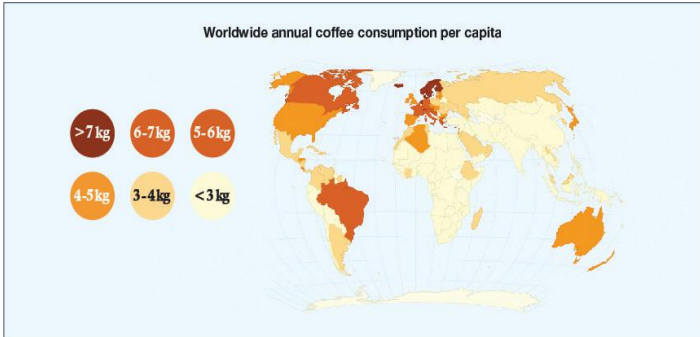
The paper is a study of the food and drink sector, and specifically of the coffee shop industry. Conducting a mixed methods research, the study intends to investigate the challenges of the entrance of a Greek coffee shop company into the US market. The research intends to study both target responders using the strengths of qualitative and quantitative methods. The target responders are independent US coffee shop companies which have successfully corresponded to the local competition, and especially against industry leaders, and on the other side Greek coffee shop companies with presence in markets abroad.

The mixed methods research objective is to gain an understanding of underlying marketing strategies on driving factors that determine a successful entry into a foreign market by using a cross-national comparative design. The provided insights and outcomes of the research is compared to the trends and processes applied in the US market by the local and international competition, helping to develop ideas or alternative solutions in similar challenges. The comparative analysis includes culture, economic, competition, operation, technologic and logistic dimensions to give a spherical coverage of the project.

2. Coffee Shop Industry

The history of coffee shop is a paradigm of how a human cultural need for socializing has been mutating through the centuries to a mature industry of products and services. Coffee shop history has always been parallel and interrelated with the course and evolution of coffee; from being banned in Mecca of 16th century, as places for political gatherings and drinking, to our days where the social networks have become the diffusive powers of spreading the coffee shop chain firms, like Starbucks, at record levels [3].

Figure 1: Worldwide Annual Coffee Consumption Per Capita



Source: Athens Coffee Festival, 2018

Coffee is the leading beverage in consumption across the Western world after water, among all -alcoholic and non-alcoholic- beverages [4]. Over the last five years, global coffee consumption has been increased by 2.3%, reaching 9 million tons (Figure 1). The coffee shop culture has been also spread across the developed world, in countries relatively new to consumerism, with the range of products offered meeting the demand for a larger variety of foods and better quality products [5].

Our study is mainly focused on the coffee shop industry in two geographic segments: the Greek and the United States market. More than the significant difference in market size, there are other important variations in coffee culture that need to be taken into account in order a Greek coffee shop company to successfully gain a part of the American consumers, over the already established key players of the coffee shop industry. An overview of the coffee sector in each country is going to provide the necessary information to form the frame of the challenges and the success marketing factors of the project.

2.1 Coffee Shop and the Greek Market

It was on 1555 when the first coffee shop opened in Constantinople during the period of the Ottoman rule. In 1700 there are more than 300 coffee shops in Thessaloniki, and many more in the north Greece. However, coffee began to play a major role in the Greek life during the independence war (1821) and later, when the coffee shops adopt elements from the local culture and become important places of the social and political life [6]. At the beginning of the 20th century are introduced the first specialized shops (“kafepia” and later named “kafekoptia”) that sell coffee in processed form.

The arrival of the instant coffee in modern Greece was a benchmark in the history of coffee. After a period of tough government interventions following the World War II in the price of coffee for currency reasons, the quality of the Greek coffee offered was degraded, turning the consumer to the newly appeared instant coffee [7] that dominated soon the market. From 1990 to date, the total consumption of coffee in Greece has more than quadrupled in terms of volume and value [8]. Also, the domestic market has demonstrated a significant increase in the quality of coffee reaching the end consumer.

The quantitative growth of the Greek coffee market has brought the country in the 15th position in the world ranking, in per capital consumption of coffee at 5.5 kilos per year [8]. With an internal market valued currently at 400 million Euros, the coffee shop sector is

characterized by a positive dynamic [9]. Nevertheless, the financial crisis affecting the Greek market the last decade and the increased coffee taxation have shrunk the purchasing power of the Greek consumer, leading to an extraversion policy and a "migration" of the Greek coffee companies [9]. Using as motivating power the presence of populations of Greek students and immigrants in other countries, they have been successfully introduced into the South East European market, as well in United Kingdom and Germany, planning new steps into other growing markets like China or Middle East.

2.2 The Coffee Shop Industry in the United States

Coffee arrived to the new world in the mid1600's at the New Amsterdam, later named New York by the British [10]. Though coffee houses rapidly began to appear, tea continued to be the favored drink in the New World until 1773, when the colonists revolted against a heavy tax on tea imposed by King George III. The revolt, known as the Boston Tea Party, would forever change the American drinking preference to coffee.

Coffee houses patterned after the English and Continental prototypes were soon established in all the colonies [11]. The history of coffee in colonial New England is so closely interwoven with the story of the inns and taverns that it is difficult to distinguish the genuine coffee house. The modern coffee industry was spawned in late nineteenth century America during the furiously capitalistic Gilded Age. By the beginning of the twentieth century, coffee became a major consumer product, and by 1950's coffee was already the American middle-class beverage of choice.

Today, coffee is the most commonly consumed beverage in the United States, even more than the tap water. In 2015, a study produced by the National Coffee Association in collaboration with the Specialty Coffee Association of America shown that the total economic impact of the coffee industry in the United States in 2015 was \$225.2 billion, while the coffee-related economic activity comprised approximately 1.6% of the total U.S. gross domestic product, with the consumers spending \$74.2 billion on coffee. The coffee industry was responsible for 1,694,710 jobs in the US economy generating nearly \$28 billion in taxes (including ancillary goods).

The size of the coffee shop industry in the country is following on similar levels, counting more than 34,000 stores in 2017, with combined annual turnover of about US \$44 billion [12].The Project Café USA 2018 Report from Allegra World Coffee Portal reveals that the

branded coffee chain landscape is dominated by the sector's leading operators, being highly concentrated at the top and fragmented at the bottom. Together, the top three chains account for more than 70 per cent of the branded coffee shop outlet share and an estimated 75 per cent market turnover share.

3. Driving Factors that Determine a Successful Entry

The market is driven by multiple factors that affect differently the competition, according to its size and segments. As the out-of-home coffee industry in US continues to expand, leading companies such as Starbucks, Dunkin and McDonald's form the forces that impact the competition within the coffee shop industry. Based on these forces and taken into account the Porter's Model analysis of the sector, the driving marketing factors that determine the planning of a successful entrance into the US market, could be described as following:

Image – lifestyle: selecting the target segments. The industry is increasingly impacted by consumer's perception of what a brand stands for [13]. When Starbucks was first created, its CEO's vision was to create a "third place" for Americans. Americans already spent considerable time at home and work and his vision was to provide a third place for Americans to not only drink coffee but to invest significant personal time [14]. However, Starbucks coffee culture may not widely accepted [15]. The market segmentation varies by the type of products the costumers consume - like the specialty coffee drinkers or the whole bean buyers [16] the business status of the people – e.g. office employees, college students etc., or the lifestyle preferences - like the coffee shop lovers looking for an ethnic or multicultural differentiation.

Prime locations. A coffee shop company has to target premium, high-traffic, high-visibility locations near a variety of settings, including downtown and suburban retail centers, office buildings, university campuses, and in select rural and off-highway locations across the world [13]. These locations provide a significant competence and advantage to be able to penetrate prime markets and tap into customers convince factor [15]. In contrary with the larger chains, the independent coffee shops are locating in suburbs, small towns, and rural areas choosing places overlooked by them [17]. *Products: education about coffee.* The US has a highly developed coffee culture with continued market growth, but existing consumption patterns are challenged by the rapid rise of influential artisan vendors who have raised coffee standards [17]. Many leaders in coffee shop industry have expanded their portfolio of

products to cater all age groups and demographic factors [15]. On the other hand, the recently introduced specialty coffee shops have invested in high quality coffee products, transforming the coffee aesthetic and gaining an increasingly market share.

Technology – service innovation. Technology is a significant driving force for the success of a coffee shop. For example, line management is an important issue for coffee houses as often the demand is concentrated in the early mornings [18]. Many industry major companies have been able to achieve customer service efficiency by introducing automatic coffee machines and investing in mobile applications.

Employees. There are many excuses that companies could list for not training their employees. There is an edge of truth in all of these; but when we look at the whole picture we find that the money they saved by not training is likely to be spent on the problems that lack of training causes [19]. On the other side, today's coffee shop leader companies' employees can't fairly called professional baristas anymore [20], keeping company's image by providing training concentrated on service and not on coffee.

Collaboration – partnership. Collaboration and partnership are important, and tie with company's growth and product/service innovation, to create new products, reach new customers, and enter in new channels of distribution like grocery, cruise lines, airline industry or educational facilities [18].

Logistics. Domestic and international logistics affect channels of management, like customer service, packaging, inventory management, traffic management, and create a value added to the supply chain [21]. An example in coffee industry is the compartmentalization and standardization of the production of coffee in their shops by the most corporate chains [17], increasing the efficiency of the logistics chain.

4. Research and empirical findings

Conducting a mixed methods research, the study intends to investigate the challenges of the entrance of a Greek coffee shop company into the US market. The research intends to study both target responders using the strengths of qualitative and quantitative methods. The target responders are independent US coffee shop companies, which have successfully corresponded to the local competition, and especially against industry leaders, and on the other side Greek coffee shop companies with a presence in markets abroad.

The mixed methods research objective is to gain an understanding of underlying marketing strategies on driving factors that determine a successful entry into a foreign market by using a cross-national comparative design. The provided insights and outcomes of the research will be compared to the trends and processes applied in the US market by the local and international competition, helping to develop ideas or alternative solutions in similar challenges. The comparative analysis will include culture, economic, competition, operation, technologic, and logistic dimensions to give a spherical coverage of the project.

The seven participated coffee shop companies are examined in the study in eight themes regarding their marketing strategies. Additional to the mentioned identified factors related to marketing (Target Segment, Selection of Location, Offered Products, Technological Innovations, Employees, Partnerships, and Logistics), the Company profile, is an introduction including companies' profiles, aiming to place the information in the requested context.

4.1 Company profile

Every firm must develop its own identity [22]. Part of this identity can be defined in some basic statements about the company, such as vision, mission, policies, and value statements. Several questions sketch the features of their profile, aiming to a better understanding of the market frame they operate, their origins and size, and their future objectives. Generally speaking, brand identity is a central feature in creating and maintaining markets for a franchiser's products [23]. In the past few years, journalists have pointed to the "Starbucks effect" and detailed how we have all been "Starbucked" [24]. The company has a broad and lasting impact on American life, becoming for many over the last fifteen years the most popular everyday form of luxury. At the same time new coffee chains, each with thousands of shops, have sprung up around the globe [25]. However, nowadays this breakneck expansion tends to reshape coffee-drinking habits over the world with people asking for differentiation and uniqueness. That is what in the United States the independent coffee shop companies represent, and what the international competition is taking advantage of.

Participant companies' identity appears variations in size and orientation. The size of the participants between the US and Greek market is not analogical: US independent companies operate between one store (50%) and two stores (50%), with no additional facilities mentioned. On contrary, Greek companies have respectively sized with one-third of them

operating between 30 to 40 coffee shops and the other two thirds with more than 300 stores. Further facilities complement their logistic network, including their coffee farms (P3, Greece). Furthermore, the selected US-independent coffee shop companies represent the antipode of the tough and concentrated competition of the industry's major companies (e.g. Starbucks, Dunkin). Their answers reveal two main characteristic cultures: one is an international approach with French (P1, P3, US) and Arabic (P2, US) influences, and the second (P3, US) is the traditional American restaurant – coffee house, a modern version of the coffee houses at the beginning of 19th century. Greek coffee shop companies on the other side are some of the best representatives of the Greek coffee market with respectable operating sizes. “Dynamically growing chains of coffee shops specialized in coffee and fast food” (P1, Greece), they have opened successfully the doors to international competition with some of them achieving European recognitions (P2, P3, Greece).

The companies under study show a little discrepancy concerning the services offered. Nevertheless, 28.5 percent of them (P4, US) (P2, Greece) are focused more on food services, and a 14.3 percent (P3, Greece) is a representative of the specialty coffee shop industry. The image that is being formatted shows a persistent look at the basic characteristics of the coffee shop from the American representatives, while Greek companies are taking initiatives in specialized product sectors. Regarding the question, “*What compelled you to start this business?*”, “*tradition, history, innovation, excellence, expansion, great opportunities*”: these are some of the factors fueling the Greek coffee shop business since their origins. US representatives demonstrate a more family-oriented start-up based on “love” for the coffee and food business.

Two out of three Greek companies stated that they choose their target markets after “specific marketing surveys” (P1, Greece) and “several variables” (P3, Greece). Another participant (P3, Greece) responded that: “The Greek audience is our most ardent supporters!” American companies replied that the reasons to choose the state were “a general opportunity” (P1, US), “a fast-growing environment” (P2, US), or because of family reasons (P4, US). Regarding the question: “*What is the market opportunity?*”, only one participant replied to the question describing the market opportunity in the United States: “You have to be genuine in your presentation and authentic in your services to benefit from a small opportunity margin that is capitalized by chains” (P1, US). Greek companies following the same motif in their descriptions underline the words “unique”, “not saturated”, “differentiation”, and “genuine”.

Finally, almost all companies (85.7%) consider the local or international competition. Against antagonism, 42.8 percent of them propound innovation, new ideas, and adaptability, and another 42.8 percent differentiation and authenticity. On the other hand, “expansion” is the main objective for six out of seven representatives *for the next two years*. Specifically for all Greek businesses, the expansion is referred to the local and international market by a “qualitative and quantitative development” (P3, Greece) of their networks and the entrance in new target countries. Regarding the mission and the vision of your company, “quality and continual improvement in all areas of guest experience” (P4, US); “Best experience” (P2, Greece), “best products” and “best service” (P1, Greece); “Recognizability” (P2, US); “To develop a strong network, fully committed to coffee excellence, easily accessible to everyone” (P3, Greece). These answers showing that excellence and recognizability is the common path for almost all the participated coffee shop companies.

Overall, the American coffee shop market seems to follow three different directions regarding companies’ profile: the Starbucks aesthetic, the return to the classic coffee-house, and the ethnic-cultural café. The last two are the preferred choices of the small size American companies, with the first one being adopted from the larger competitors inside the US and abroad. Regarding the Greek companies, taught by the food and coffee industry pioneers, they have blend in their profile an innovative specialization together with ethnic culture, to withstand antagonism. “A genuine and authentic representation could benefit from a small opportunity margin that is capitalized by chains” underlines one of the American participants (P1, US). And on that, the Greek representatives agree by adding values like differentiation and uniqueness. With the standards of convenience and speed of service always in high demand (P3, Greece) in the coffee shop industry, quality and continual improvement are the tools to achieve recognizability and to develop a strong network, fully committed to coffee excellence, and easily accessible to everyone” (P3, Greece).

4.2 Target segments

Market segmentation involves a subdivision of the market depending on the behavior and characteristics of the buyers [26]. The selection of the target market depends on environmental, social, economic, and political factors. This theme attempts to identify the target segments of the coffee shop companies, with references to practices regarding the market positioning and channel distribution.

Representing the second wave of the coffee industry, the majority of interviewees follow an undifferentiated marketing strategy based on enjoyment and defining specialty, according to the terms first introduced by Trish Rothgeb [27]. But where is the leader of the world and the United States coffee industry moving towards? The new millennium found Starbucks pushing themselves to develop a higher-end brand, transforming the consumption into an “experiential destination” [28]. According to the answer, Starbucks is the most internationally recognized coffee shop brand according to 57 percent of the answers. Other international players’ presence, as well the local competition, is always a considerable factor that affects the market share in each country (P2, US) (P2, Greece).

Aiming at the third wave purists, an “artisanal” coffee emporium, the new strategy involves a three-pronged attack consisting of (1) the Roastery, a handful of massive, ultra-luxurious coffee places, (2) a new brand of rare and single-origin coffee beans called Reserve, and (3) the second line of boutiques, a notch above a regular Starbucks but not quite as over-the-top as the Roastery, also called Reserve [28]. Although Starbucks wants to keep serving ninety million people a day, their decision presents the trend towards specialty coffee and the third wave coffee experience.

The findings based on participants’ answers are the following:

- With an undifferentiated marketing strategy, where the whole market is considered as a single market, replied the 85.7 percent of the questioned companies. Only one participant (P2, Greece) follows a concentrated market strategy, however, with a wide audience focused on middle-low class, and ages between 18 and 55.
- A positioning strategy is a deliberate branding plan or process that operates on the symbolic levels of consumer consciousness, where meanings and associations – even of individual words – really hold the weight [29]. The picture formed shows a focus on food and atmosphere regarding the American market, with the Greek companies on the other side, positioning themselves pointing out their coffee and specialty products, and their quality ingredients. As was expected, service experience has the same gravity for both markets. Prices, accessibility, and specialty products are not mentioned at all by US participants.
- No issues or concerns regarding companies’ products or services were reported. An exception is a reference to the adaptability of the consumer community to technological developments, such as the use of new applications related to services (P2, Greece).

- Small size US coffee shop companies replied that their identity was introduced slowly to the local society without following any specific marketing strategies. On the opposite side of the ocean, the two largest Greek coffee shop brands are following different strategies regarding their introduction. P2 (Greece) reports: “Expansion in every country of course requires the appropriate marketing spending to become known. The actions taken are events in the store, advertorials in magazines, press releases, and naturally digital/social media. Of course, there are also no sampling/treats outside the store”. In a different motive, P3 wrote: “Our development over the years was based almost entirely to below the market marketing schemes since the network itself reflected its dynamic and attracted new investors.” The other two Greek participants follow a mild marketing strategy based on social media.

In general, with the key players focused on consumption, and local competition positioned based on food and atmosphere, the US market could be characterized in the majority as a dynamic evolving and moving, less conservative than in the past, but still navigated by the field leaders and with less ethnic influences. On the other side, Greek companies experiencing international competition and multicultural segments, demonstrate adaptability by either representing the third wave developments introducing innovating products or by targeting wider and more demanded segments with higher quality products and standards.

4.3 Selection of location

The Van Nuys (Calif.) The news said the three most important things about real estate were *location, location, location* in its issue of June 10, 1956 [30]. A prime location has been always desirable for a coffee shop because it can be a major contribution to its success or failure [31]. High visibility and high traffic are the two most advantageous benefits of a prime site. In the contrast, the downside of opening a coffee shop in a prime area is the high price of rents and rates [31], or requirements like royalties and premiums.

All the participants recognized that location is maybe one of the most single important decisions. : “In the Food & Beverage industry location was always a vital factor for the business success” (P3, Greece). However, for the Greek coffee shop companies, there is great connectivity between the selected location and logistics system, especially in the prior selection of the country target. The research showed that prime locations are desirable for Greek companies, especially when they first enter a new market. However, in the United States where the market is dominated by the major coffee shop enterprises, prime locations

seem to be already preoccupied, increasing the local competition for an independent company or a new entry. Thus, the American independent companies have a preference for locations in the suburban and business areas with high traffic, where financially are more affordable. Pedestrian convenience is mentioned more than vehicle accessibility, without taking into account the second as a problem at the areas under consideration. In general, The Greek coffee shop companies reveal their orientation to prime locations with high visibility. On the other side, US independent coffee shop companies concentrate their focus on areas based on their target segments, avoiding the prime locations where the competition from the key players of the industry is intense.

Choosing your shop unit: The financial impact of a poor store design can be significant since the speed of service is critical to the profitability of a coffee business [32]. However, a successful coffee shop should be more than a place in which to eat and to enjoy a perfect coffee – it must be a place ruled by geniality and sociability, a pleasant place to spend a few moments of leisure [33] “Not too much space to handle but a good amount of seating for guests.” (P1, US). For the Greek companies the space size of 80 square meters appears the ideal average based on their responses. A medium-size coffee is the choice of the majority of the survey participants, following the “Third place” philosophy that Howard Schultz, Starbucks’ founder, introduced almost thirty years ago. Even more nowadays that “coffee shops are base camps for so many American adults who work outside an office”, as Jeff Pearlman noticed in his article in TIME magazine [34], coffee shop experience extends beyond a quick cup of joe.

Considerable factors regarding the selection of a business site could be financial, as the decision of renting or buying an established business, a shop within a retail store or a shopping mall, as well as logistics, especially when entering in a new market and regarding with the cost and the distance of the supply chain. To summarizing, “to proceed with a final decision all parameters must be studied, and after a detailed business plan including break-even analysis, payback period, and financial indicators like NPV and IRR, we may conclude to a specific option” (P3, Greece). The necessity for parking areas is underlined by all the participants in the US market. In the contrast, 66.6 percent of the Greek companies reported that vehicle convenience is a considerable factor for the business location but it is not necessary. Participants’ answers reveal the different point of view in the target areas, where for the Greek coffee shop companies is following their search for prime locations, which often are located in urban and crowded areas.

Regarding any possible legal issues addressed on the leasing of the business facilities, the answer was negative by all participants. The financial factor though appears with a different perspective. P1 from the US mentions that: “*The biggest factor is always deciding to either rent or buy.*” P2 (Greece) notices that the high financial cost of a coffee shop is a substantial factor, especially when is about your “flag” shop, where the prime location is the criterion sought. Considering the size of the company, the selection process of a business site could be more complicated, requiring a detailed business plan to conclude a specific option. Owner requirements like royalties or premiums may also apply to locations with high visibility (P3, Greece).

4.4 Offering products

Coffee shops are coffee shops because they sell coffee, which would lead one to believe the beverage is a big part of the draw [35]. That’s not always true. Nowadays, healthy food options, a wide range of alcoholic and nonalcoholic beverages, exotic raw coffee varieties, and coffee equipment from coffee mugs to coffee makers or souvenirs, add to the priorities of what makes a great café. On this theme, our goal is to find how the coffee shop experience is extended beyond a quick cup of espresso, and what the product preferences in both markets are. Our caffeine habit, and our willingness to pay up for it, has made coffee an increasingly critical element of the food economy, and in particular the restaurant industry [28]. “The flavor profile of a coffee, when matched with similar notes in food, can become the gateway to appreciating specialty coffee”, says Mark Byers, head barista at Bridewell in Donaghadee [4]. In our study, we tried to have an insight into how coffee shop companies add value to their coffee products by introducing to customers a variety of other food or beverages. Especially, our purpose was to identify the differences between American and Greek companies’ product portfolio, and how they position themselves to the local markets.

The coffee community in the US is experiencing variations in preferences differentiating from state to state, the urban centers to suburban areas, and from north to south or east to west, depending on the influence of different cultures (e.g. European, South American, African, and Asian). The introduction of new specialty coffee products in this multidimensional motif is taking place at a different pace, with a few representatives working as pioneers of the field and the majority following slowly the mainstream. On the other hand,

Greek companies have demonstrated a continuous effort to assimilate the developments introduced by the third wave by investing considerable capital in research and development.

The study has shown that the offering products are closely associated with the positioning of the coffee shop company in the market and how closely related is to the foodservice. American independent companies have presented a relatively narrow list with very few specialty products regarding the coffee, and with a preference for pastries concerning the food. For the US market, it is remarkable the lack of raw coffee products. The signature products mentioned by US participants are mostly pastries (85.7%) and coffee (57.1%). Greek companies presented a variety of signature products, like specialty coffee products (85.7%), herbs (57.1%), and Greek pies (28.5%). Other products mentioned by US coffee shops were tea (P1, P2, US), jam (P1, US), and sweets (P2, US). Additionally, only 57.1 percent of the participants' responses include coffee equipment and other not included products.

Greek participants on contrary, under the local and international competition, have developed a wide variety of gourmet coffee and food products, including local signature ones. They show a dynamic model by adjusting their products to the local markets. However, they try to minimize these changes keeping an original Greek character of their standard portfolio. The changes are less or nothing for the US business. Usually, the differences from area to area are not significant or noticeable. Specifically, they added products like sweets, crepes, waffles, and ice cream (P1, Greece), yogurts, and salads (P2, Greece), or dry mixes and herbs (P3, Greece)._However, always their priority is to keep the Greek identity as an ethnic quality distinction from their competitors. Moreover, 33.3 percent of the companies have included alcoholic beverages in their portfolios. Specialty coffee products are not so familiar among US-independent coffee shop companies, as a conclusion of their general answers to the question. In contrast, all Greek companies have invested in specialty coffee products, with some of them stating "...proud ambassadors of the 4th wave of coffee development." (P3, Greece), and having a great acceptance and recognition by Greek consumers.

Regarding the question, "*Did you have to make changes to your product portfolio? And if yes, why?*", the international experience Greek companies faced during their expansion abroad showed that always adding new or local products is a good practice to introduce your business into the local market. Thus, all Greek participants replied that changes to their product portfolio were either by adding signature local products or by introducing new ones

making a difference compared to the existing competition. In contrast, US companies were negative to the question, mentioning only product expansions (P1, US).

The last element emerging from the survey is that US companies are indifferent to the economic competition of product pricing since consumers seem willing to pay the premium of a specialty or quality product. Operating in different economies and cultures, Greek brands strive to make the enjoyment of coffee accessible to as many people as possible (P3, Greece). Seven out of eight participants responded that their pricing structures are on the average or a little lower than the average “*to make the enjoyment of ... coffee accessible to as many people as possible*” (P3, Greece). In a different view, P1 (US) stated that: “*We don’t focus on competing. We just want to provide the best treats for our guests!*”

4.5 Technological innovations

Some argue that new technology detracts from the craft, ritual, and sociability of coffee [36]. Although technological innovations are the steam engine for any respectful coffee shop brand, inspiring, and directing every new achievement towards competition, new technologies could be expensive for smaller competitors, who, however, show faster adaptability on them. Coffee retailers are utilizing technology similar to other retail and service industries, leveraging technology for convenience, speed, and personalization [36]. More than that, a coffee shop works as an innovative social network connecting people, cultures, and businesses.

Not all innovation comes from Silicon Valley [37]. As the coffee market becomes more crowded, innovation becomes more critical to success. Technologies like smart kitchen, or specialty coffee production, and social media platforms have reformed the classical image of a coffee shop. On this theme, participant companies have been asked about the technological innovations they have introduced to their business to improve their products and service, as well as their degree of familiarity and interference with web applications.

Although the US independent coffee shop companies support one hundred percent of the technological innovations in the coffee industry, none of them specified how they have adapted them into their products. The reason could be determined by their size and their full dependence on the suppliers for their offering products. The Greek companies mature enough, and with an international presence are focused primarily on coffee production investing in

coffee equipment (P1, P2), or customizing the entire production line to meet the expectations of their product portfolio (P4, Greece).

Social media and e-technologies (all participants replied that they have a web presence showing the great importance of the network in advertising promotion and customer service.) are on the top of companies' preferences regarding the interference of the new technologies with the customer service. However, Greek participants show their preference in technologies relative to e-ordering and e-delivering, representing a trend that the US coffee shop market is not so familiar. Other innovations mentioned are the gift cards (P2, US), and a ticketing system for customer service (P3, Greece).

Our research has shown that the adaptability to technological innovations is proportionate to the size of the business. Small independent coffee shop companies are unable to invest large capital into service innovations. Nevertheless, they recognize the importance of web marketing setting as a priority their presence in social media. On the other side, Greek coffee shop companies, competing on a larger scale, have familiarized many technological innovations regarding service and media presence, with some of them applying cutting-edge technologies into the coffee production process.

Applying the keys for successful digital marketing, including content marketing, search engine optimization, mobile marketing, and social media marketing [38], one hundred percent of the Greek coffee shop companies have replied positively to all of the above web forms. Online research of their web presence confirms how significant online marketing for them is. The 87.5 percent of US independent companies replied positively only to the answer "your website", using less sophisticated websites. However, one company (P2) has a presence only in social media marketing, using the "Facebook" platform. That reveals that even for a small size business the social media presence is the priority or the first step into web marketing. Convenience is a philosophy that all the Greek coffee shop companies have invested in, by developing online ordering applications in combination with delivery at your place. In contrast, e-ordering is not in the priorities of US companies, representing a different approach to customer service.

The study around technological innovations has raised another difference between the American and Greek coffee community. All Greek participants have mentioned a considerable investment in consumer convenience by developing web and phone applications for online ordering and delivery on spot. In contrast, the US independent coffee shop

companies are mostly relying on customers' physical presence. Even the industry's dominant brand, Starbucks, being unique in that it already has a highly engaged mobile audience, its new mobile technologies experimenting is to interact with customers about specials, discounts, or coupons [36], but not to deliver products or services.

4.6 Employees

It wasn't until the 1960s that a market for higher quality and greater variety in coffee presented itself [39]. The second wave of coffee shops emphasized better coffee but retained marketing and social elements as driving forces, achieving brand consistency and as a result uniformity in a product. The resistance to this uniformity gave birth to the third wave, characterized by the specialty coffee culture and high trained baristas. Specifically, in the coffee shop industry, the need for human capital is limited in terms of both the number of employees and their requisite skills, allowing more players in the market arena since the capital investment could be low [17]. However, a corporate image and purchased products can only go so far as to create a relationship between a consumer and a company; employees are the essential glue that holds the whole operation together [40].

These two factors could work diametrically opposed regarding employment in the coffee shop industry. Low unemployment rates can lead to increased training costs due to the ease of alternate work of employees and consequently to operating problems, as it is mentioned by the participants. The majority of the independent companies in the United States offer competitive wages in order to minimize the loss of trained staff. Additional benefits or career opportunities are according to the size of the company.

Furthermore,

- The 75 percent of the US participant companies answered that the total number of employees is more than twenty, with an average of 10 to 20 employees per shop. Similar size coffee shops are representative of the Greek companies abroad, although the total size of their business is much bigger.
- The majority of the companies (85.7%) provide employees a structured training program. The duration is at least a week, which can be extended according to the position's needs. On the other side, none of the participants mentioned any special training program focus on the specialty coffee culture (e.g. baristas).

- The quality of services offered is usually interconnected with the compensation offered. 50 percent of the participants in both countries replied that their compensation is above average or competitive, with the other 42.9 percent to vary around the average.
- Because of their size and structure, Greek companies offer either the opportunity for a career within the company (66.6% of the Greek participants) or other bonuses and awards based on employee assessment (33.3%). On the other hand, most of the independent US companies did not comment the question and only one participant (P1, US) mentioned the career opportunity.

The research showed that the coffee shop industry remains focused on hospitality and customer service culture. Hospitality culture is emphasized by all US companies through their replies: *“To provide guests with the best experience possible.”* (P1, US); *“Be pleasant. Kind. Efficient.”* (P4, US); *“Smile and welcome.”* (P2, US). Greek companies considering Greek hospitality culture as a prerequisite, they emphasize teamwork and strong team bonds.

A current literature review revealed skills mostly used by service employees in successful people-oriented organizations were those of effective communication, active listening, trust, and rapport building, telephone etiquette, problem-solving, diffusing anger control, stress skills, and interpersonal inspirational skills [41]. Additional to a service culture, Greek coffee shop brands reported a core of Greek employees, in order to maintain the ethnic orientation that differentiates them from the competition.

“Good manners”, “smile”, “politeness”, “helpfulness”, “problem solvers”, “hard workers”; are most of the criteria for employee selection according to participants, which are absolutely associated with the service sector. The passion for coffee, challenges, and development is noticed only by 28.5 percent of the responses (P1, P3, Greece), showing a different approach. Previous experience was mentioned only by one participant (P2, US).

Regarding the question: “Did you have problems nurturing your business culture to your local employees?”, no problems were reported by 85.7 percent of the companies in both markets. Although the negative answers, P2 from Greece points out that: *“The truth is that local employees have not learned to work in Greek schedules, and deviations from the 8-hours shift may cause them to be out of the question. It has been observed, that since unemployment in foreign countries is at a very low level when they feel the pressure for a while, they give up, as long as they know that in day 1 will find another job.”* This is a reality that the majority of the business in the service sector faces to a large extent in countries with

a low unemployment rate, increasing the cost of employment' training and affecting the efficiency in daily operations.

Considering the future, the resistance against branding uniformity that initiated the third wave in the coffee industry requires a different approach and an additional investment to employees. Highly trained baristas that could make suggestions based on tasting notes and intensity of flavor [39], educating people about coffee and its origins, or roasters involved in a direct-trade relationship with the farmers anticipating the arrival of a new wave, entail a considerable investment in human resources based on a completely different motif.

4.7 Partnerships

Partnerships or collaborations allow for innovation, channel extension, and even geographic extension [42]. Companies form strategic networks with their suppliers, distributors, financiers, and others to ensure that access to resources is easy and available [43]. The underlying purpose is to make sure that brands are entrenched in strategic networks that will eventually help to maintain companies' position in the industry. Taking as an example Starbucks, in order to implement his vision, Schultz required three types of additional partners: financiers, value chain partners, and real estate partners [44]. He established partnerships with premium coffee bean suppliers and with real estate partners for making sure top store locations.

The examined American companies of our research have not demonstrated any kind of cooperation in any of the fields of the study, because mainly of their size. The Greek brands, on the contrary, emphasized their partnerships in logistics, especially in consideration of the entry into a foreign country. Moreover, partnerships in the logistics and supplying section are not in the consideration of the independent coffee shop companies in the US, where their size and geographical orientation is supported satisfyingly by the local business. On the other side, 66.6 percent of the Greek companies point out the importance of partnerships regarding their logistic system, especially in consideration of the entry in a foreign country; "*The Logistics determines very much entry to any country.*" (P2, Greece).

Why partnerships? Many global and regional companies entering new markets have collaborated and leveraged the resources of local companies [43]. Such collaborations would not only facilitate a quicker entry into the market but also enable a company to learn the

nuances of the local business market. Moreover, an entrance into the American coffee shop market from the other side of the Atlantic Ocean requires significant capital investment and careful planning of logistics and distribution channels, making partnerships more than necessary for a sustainable presence in the foreign market.

Answers to the question “*Has your company proceeded to any collaboration-partnership in order to create new sales-advertising channels? (e.g. media, sports teams)*», reveal that the majority of the companies (85.7%) in both markets haven’t exploited this channel. Although the negative answers, five of the participants (71.4%) have replied “Not yet”, underling the potential and the willingness of such collaboration in the future. Finally, regarding the question “*How do you evaluate your partnerships?*”, “Common interest”, “mutual standards”, and “high quality” or “level of service” are some phrases that point that common interest and high quality of standards are the reference points when participants evaluate their partnerships. “*We work on personable connections built on a common interest of bettering and expanding the business.*” (P1, US). “*A successful partnership is based on the mutual high quality of standards.*” (P1, Greece).

4.8 Logistics

Logistics have an important value-added service in the production and marketing of goods [45]. Impediments in the supply chain significantly raise the cost of doing business and affect critical economic sectors. The answers between the US and Greek companies were diametrical opposite. US coffee shop companies haven’t organized separate logistics systems to support their coffee shops, depended mostly on the local vendors, in comparison with the Greek ones, where a separate logistics system makes the expansion possible and functional.

First, logistics have a dominant role regarding the expansion of a Greek coffee shop company abroad, and moreover considering an entrance into the American market. Collaboration with logistic and storage companies appears as a necessity for the Greek companies operating abroad as all the participants' mention. The critical factors on this collaboration are the add-on costs and the safety stock; “*We try to collaborate with logistics chains and storage companies that do not burden the food cost more than 10% -15% of the cost of goods we have in Greece*” (P2, Greece), “*Based on the sales of the stores we keep safety stock...*” (P3, Greece). Our participants have experienced logistics challenges formatting partnerships with logistics companies / Third Party Logistics and adjusting their operations accordingly.

Forecast, good planning, and collaboration with local suppliers are the main directions mentioned concerning the adjustments on their supply chain. The goal is to import the core of the products from Greece (up to 85%), minimizing at the same time the additional burden over products' prices.

How difficult is it to achieve an entrance into the US market following the same strategies? The extension of the supply chain, different regulations, and customs duties, or additional taxation could impose serious problems in such a concept. Thus, an entrance into the American market should consider factors like the proximity to domestic and international transportation systems, identification of potential go-to-market partners, market research, and locational planning analysis [46].

On the other side, our American representatives haven't mentioned any difficulties in supplying domestic or international products in the extensive and plural US market by using local distributors. Many foreign companies during their expansion have "Americanized" their products and services in order to minimize the logistics costs, by collaborating with local companies regarding the local production of their product portfolio instead of investing considerable capital into logistics.

The search for the right partners and the initial cost of the investment were the main challenges that companies faced regarding logistics. Four participants out of seven (57.1 %), point out the importance to build a right, "win-win" partnership (P2, Greece), with the "*same goals and high standards*" (P1, US). Apparently, Greek companies face more uncertainty because of the high logistic costs and the primary lack of estimators.

5. Conclusions

This study shows that Greek coffee shop companies could withstand successfully against the competition in the United States, based on their international experience, and characteristics like innovation, quality, differentiation, and authentic ethnic culture. The risks and challenges of entering the biggest world market could be minimized with careful business planning and willingness for adaptability.

The purpose of this study was to identify critical marketing factors for a successful entrance of a Greek coffee shop company into the United States market. The blend of information gathered from the interviewees is reflected in the conclusions we presented above. Based on

them our recommendations considering the directions and the strategies on planning such a business movement could be summarized as follows:

- Company Profile - The profile of the company should represent an authentic ethnic Greek welcome culture and atmosphere, propounding differentiation and uniqueness, and signifying the excellence of the third wave of coffee evolution.
- Target Segments – Everyone who wants to differentiate himself from the mass market of the big coffee shop chains looking for quality and ubiquitous friendliness. To make the enjoyment of specialty coffee accessible and convenient to as many people as possible.
- Selection of Location – The selection of a location should always follow a detailed business plan and detailed research. Partnership with local real estate agencies in order to get insight into the local market. Prime locations should reflect the company’s profile and not the competition’s image.
- Offering Products – In order to distinct your identity from the local completion, the product portfolio should be characterized by a plurality of authentic gourmet coffee and quality food products, including local or ethnic specialties. An Americanization of the offering products is not recommended.
- Technological Innovations – Every capital investment in technological innovations should be focused on the introduction of new quality products and on service convenience, speed, and personalization. Adapting these innovations at a fast pace is critical against the competition.
- Employees – Employees represent the brand’s image. Working staff assimilates the company’s culture and vision, by cultivating among them the sentiment of grouping and building high professionalism. By investing in innovative training programs, and offering future career opportunities loyalty and efficiency are increased, and operational costs are reduced.
- Partnerships – Partnerships are critical in order to succeed in entrance into the United States market. Collaboration with suppliers, real estate agencies, and logistic networks could help to overcome difficulties, minimize the risks, and compress the costs and capital investment.
- Logistics – Logistics operations are in full association with the decisions made regarding partnerships and collaborations. Proximity to domestic and international

transportation systems is considerable important planning an entrance into the American market until necessary logistic infrastructure and network is built.

As a first concern, the geographical limitations affecting our study could be the subject for further research. The United States market is still one of the largest and most homogeneous markets in the world. It is composed of an ever consuming public, speaking a single language, and the country has a relatively similar business legal framework from state to state [46]. However, because of its size and its proximity to different cultures, the local factor could be significant differentiated from the main image.

Additional recommendations for further research are regarding each marketing factor of our study. Targeted qualitative and quantitative researches could give a more detailed insight into each aspect of the American coffee shop market and the investment opportunities arising from them. Last but not least considerations for further research are the challenges that result from the entrance into a different business and legal framework. Forming legal entities, investing in US identities, taxes and real estate considerations, employment and immigration, and regulatory matters [46] are key points that affect considerable business planning.

Summarizing the United States coffee shops industry report by [2]: “Continued increases in consumer confidence and disposable income have had a positive impact on the Coffee shops industry in recent years. Well positioned for growth, the industry is expected to reach \$46.2 billion by 2021. With such growth, the industry will continue to experience intense competition driven by pricing, new product introductions, and expansion into healthier alternatives for consumers. Industry heavyweights such as Starbucks and Dunkin’ Donuts will remain formidable competitors for independent establishments, both nationally and abroad”.

Our study has shown that Greek coffee shop companies could withstand successfully competition based on their international experience and characteristics like innovation, quality, differentiation, and ethnic culture. The risks and challenges of entering the biggest world market could be minimized with careful business planning and willingness for adaptability.

“Coffee, great coffee in particular”, says Schlader, “is something that no matter what one does for a living, no matter how much one earns, no matter if one lives in a 20-bedroom mansion or in a 200-square-foot studio, we can all enjoy just the same” [34] The challenge is to “recognize demand because demand drives success”.

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