

SHOP DIRECT: GETTING PERSONAL WITH CUSTOMERS

Gareth Jones, Deputy CEO, Shop Direct on making
good things easily accessible to more people.



INSIDE OUR 'CUSTOMER CONNECTION' EDITION:

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Editor's comment



“CREEPY OR COOL” – not referring to the title of the latest bug hunting book but the subject line of the latest research to arrive at IR Towers investigating the relationship between retailers and customers.

The Creepy or Cool survey, released by personalisation specialist RichRelevance, asked UK shoppers to rate various digital enhancements to the shopping experience (such as facial recognition, promotional offers delivered to smartphones, interactive maps using location tracking in store, and product recommendations inside the changing room) as either “creepy” or “cool”.

Luckily, for retailers who are embracing personalisation technology to enhance the customer experience, almost three quarters of respondents rated personalisation of product recommendations based on their purchasing habits as a “cool” capability. They also welcome location-based personalisation in store.

However, personalisation in the form of facial recognition or personal greeting at the store entrance may not be so welcome. The trend though, at least amongst the younger demographic, is that they are open to a connected shopping experience – receiving recommendations delivered within their personal space like dressing rooms and smartphones, and allowing in-store tracking if it means getting a better deal.

Personalisation and how technology is enabling retailers to get closer to customers is the theme for this issue of InternetRetailing. Shop Direct features on the front cover with the company's Deputy CEO Gareth Jones sharing insight into the journey from catalogues to 1:1 personalisation and customers being

served the best fit from more than three million homepages.

Personalisation though extends across all touchpoints and, through the combination of engaged employees in store and technology, retailers are able to bring real insight into conversations with customers. Adam Goran, Divisional Director of Customer Engagement, Grass Roots Group, takes a look at employee and customer engagement and how omnichannel brands can stay connected with customers while Sarah Davis, head of Kurt Salmon's digital practice, examines the key components to delivering a personalised customer experience in store.

Mobile devices, text messages, apps and social media offer more ways than ever for retailers to interact with customers. As a result, retailers have gained both an unprecedented opportunity to reach their customers with personalised messages in the ‘mobile moment,’ and an opportunity to realise the rewards of increased business, brand loyalty and customer satisfaction. Kevin Davis, Senior Professional Services Director, Syniverse, explores how retailers are connecting with customers to capitalise on these mobile moments along the new retail path to purchase.

The need to go mobile is now an imperative for retailers: this can't be overstated enough. Your customers live in a mobile world and retailers need to get that. In fact, a third of all online sales in the UK will take place via smartphones and tablets this year, according to eMarketer, and by 2019 it will be closer to 40%.

The pressure for retailers to offer shoppers a fully mobile-optimised experience isn't coming just from consumers. Google and Apple continue to strive to make things more mobile – with mobile-friendly sites being favoured in search results and cookies being blocked.

Paul Skeldon investigates what these moves mean to retailers and, in a separate article on internetretailing.net, highlights simple ways in which retailers can make their site more mobile friendly.

Having the most mobile-friendly or personalised site is no good if your actual product assortment is not what shoppers want to buy. Penelope Ody investigates how data is helping merchandising and insight is ensuring that the assortment is closely aligned with what the target customers actually want to buy.

Finally, the order has to be delivered. Giving customers choice through delivery leads to multiple options for delivery and collection with implications for retailers and carriers. Sean Fleming investigates further.

As parcels are now tracked through every stage of their journey so too are customers. What was creepy yesterday is becoming cool or even the norm in retailing today. Always, there's the caveat though that the customer can see the advantage and what it means for them.

And so, this issue of InternetRetailing closes with a preview of October's InternetRetailing Conference – and the new eDelivery Conference – and what they mean for readers of InternetRetailing.

Emma Herrod
Editor



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Chloe Rigby highlights recent industry changes but to keep up to date with the news and her insight between issues visit www.internetretailing.net.

DIGITAL SINGLE MARKET

European Commission (EC) President Jean-Claude Juncker said in May that a digital single market would improve commerce for consumers and business alike as he set out a 16 step strategy to make it a reality.

By creating such a market across the 28 markets of the EU, the EC aims to “tear down regulatory walls” to improve consumer and business access to digital goods and services across Europe, to create the right conditions and a level playing field for digital networks and services to flourish, while also ensuring the digital economy reaches its potential growth.

The 16 steps include simplifying cross-border ecommerce,

encouraging more efficient and affordable parcel delivery and cutting the red tape of managing different EU VAT regimes. Other measures include ending “unjustified” geo-blocking to prevent customers buying from websites in different markets, as well as analysing the role of online platforms, from search engines to social media and app stores, to find whether search results are transparent, how pricing varies and how the platforms use the information that they acquire.

The project team is briefed to deliver on the 16 point strategy by the end of 2016, with the Digital Single Market in place “as soon as possible.”

BRICKS AND MORTAR FOR MISSGUIDED

Missguided opened its first physical retail presence in the UK in June with a concession in Selfridges at the Manchester Trafford Centre. The fashion retailer previously operated online since being founded in 2009.

The move takes forward Missguided’s focus on experimenting with the brand. “We’ve witnessed huge growth over the last six years and successfully expanded the business into new markets, which was a key priority,” said Nitin Passi, Founder and Managing Director of Missguided. “Our focus now is all about experimentation with the brand, trying new and innovative ways to engage a wider market and allowing consumers more diverse ways to shop and interact with Missguided.”

“We’re really excited to be offering our first physical in-store collection for UK consumers.”

The move follows on from Missguided’s launch in Nordstrom stores in the US in the previous month. Passi says its move to launch a concession comes in response to customer demand in the UK.

The new 39 sq m concession will be positioned between Topshop and Warehouse in Selfridges. Product themes will change every four weeks in a reflection of the Missguided website.

CHOOSE YOUR DISCOUNT

Waitrose says it’s putting its customers in the driving seat as it gives them the power to pick which groceries they save money on when they shop either in a branch or online until the end of the summer.

Shoppers who are members of the myWaitrose loyalty scheme can join the Pick Your Own Offers scheme by choosing ten products they’d like to save 20% on, from a list of almost 1,000. That list includes everyday items as well as special treats and is chosen from the most popular items that Waitrose customers usually put in their shopping baskets.

When the shopper buys those products, either in store or online, the discount is automatically applied, as long as they swipe their myWaitrose card in store or sign into a linked Waitrose.com account. Shoppers will still be able to benefit from in-store promotions, as well as price match schemes.

“Different forms of personalised marketing have been around since the 1990s, but we’re introducing mass customisation in grocery. Customers can choose what’s valuable to them when they shop for groceries. We really are giving power to the consumer,” said Mark Price, Managing Director of Waitrose.

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AMAZON COMPLETES ITS MOVE TO LONDON

Amazon has completed the move of its UK corporate headquarters to London, where it now employs more 2,000 people in Holborn Viaduct and its technology development centre at Leadenhall Court. The company expects to hire hundreds more in 2015.

"London is now officially our new home," said Christopher North, Managing Director at Amazon UK. "The move to the capital was vitally important to our continued growth in the UK and to finding the very best talent who will join our existing team that works day in, day out to provide an exceptional service for our customers all over the country, Europe and the world."

Later this year the retailer opens a fashion photography studio in London that it says will be one of the largest of its kind in

Europe, and in 2017 it will open another building at Shoreditch's Principal Place to house 5,000 more employees.

"We now have in excess of 2,000 permanent employees based in London in addition to the thousands of permanent employees in our UK fulfilment and customer service centres across the UK," said North. "We're enabling tens of thousands of UK businesses to sell their products worldwide through Amazon Marketplace, powering British entrepreneurs and business start-ups through Amazon Web Services, and we have invested well over £1bn in our UK infrastructure. The building of our new office in Shoreditch is a further illustration of the important role that London and the UK will play in our global operations."

A FULL YEAR AT BURBERRY

Burberry said its approach of investing in digital while emphasising its core British-made trench coats and cashmere scarves paid off in "robust" full-year results. The upmarket fashion retailer reported sales of £2.5bn in the year to 31 March, up by 11% compared to the same time last year. Operating profits of £456m were 7% up on last year, while at the bottom line pre-tax profits came in at £444.6m, slightly up from £444.4m last year, after one-off costs including the writedown of the value of fragrance and beauty licences.

Digital sales "outperformed" during the year, according to the company. Mobile commerce doubled its share of sales during the year after an upgraded mobile platform was launched in the second half. It also started selling through a dedicated brand space on Tmall.com and on Amazon.

It also focused on improving the user experience in areas from search to payment, as well as fulfilment.

A digital-focused strategy of providing brand inspiration across channels including online, stores and social media underlay the group's performance. During the year, the company added new social networks to core Facebook, Twitter and Instagram presence, including WeChat in China and LINE in Japan, where it livestreamed a women's runway show in February 2015, and in April 2015 it launched on Snapchat as part of a London in Los Angeles event. It used live streaming service Periscope to offer its first 'red carpet to runway' stream.

The company also invested in customer data and analytics as it looked to get to know its core luxury customer better.

Multichannel services were expanded with collect-in-store, which accounts for 20% of digital revenue, now available at 200 of its 214 mainline stores, including in Japan and China. It also tested a new approach to fulfilment in China, enabling ecommerce orders to be fulfilled in the local distribution centre and from stores. This new model will be introduced in the UK and the US in the current financial year.

THE YEAR ENDS

Online sales at Marks & Spencer fell 2% last year said the company in its full-year results statement, admitting that the new site, though technically resilient, was "a bigger change for our customers than we had anticipated", and that it hit sales. It made a number of updates to improve the customer experience over the year while also making improvements to its logistics systems and management after disruption at the Castle Donington distribution centre.

Ecommerce sales returned to growth in the fourth quarter with traffic growing by 15%, customer satisfaction by 18% and 7m new shoppers registered on the site.

Meanwhile, New Look reported a 34% rise in ecommerce sales in its year to 28 March, buoyed by partnerships with third-party websites including Asos and Zalando. Sales from its own website grew by 30.4% during the same time and mobile orders rose 115% with the channel accounting for 45% of all online visits. Click & Collect accounts for 28% of online orders, with 19% of those customer making a further purchase in store.

AO World reported UK sales up 22.3% to £470.8m but a bottom-line loss after its expansion to Germany.

Mothercare posted an 18% rise in ecommerce sales, amounting to £138m and 30% of total UK sales as it works through its transformation plan. Some 36% of its online sales are collected in store with mobile representing 82% of online sessions. The past year has seen the retailer installing iPads in store.

Turnover was up 22.8% at £654.1m at Net-A-Porter with profits moving into the black at £11m after a year of digital innovation and as the upmarket fashion pureplay marked 15 years in business. Digital 'firsts' included the launch of the NET SET social shopping network, the UK's first Instagram advertising campaign, the launch of shoppable magazine Mr Porter, and a partnership between Mr Porter and the film Kingsman to create the first shoppable film.

Iceland reported sales of £2.69bn down 0.5% on last year, for a year in which it took its online shopping service national. In-store and online orders for delivery regularly exceeded 200,000 a week.

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Read more of *Paul Skeldon's* insight into the fast changing mobile channel and keep up to date with the significant news at www.internetretailing.net.

OPTIMISE TO CONVERT

Mobile optimised sites convert almost three times more than non-optimised ones and, if you can drive people to repeat use of your app, that will convert even better than mobile or PC. Also, mobile will be the dominant ecommerce platform in the US, UK and much of Asia before the year is out.

These are just some of the findings for the latest Criteo State of Mobile Business 2015 study. Based on the transaction data of 3,000 of its clients worldwide, the study shows that already mobile is regularly accounting for 30% of ecommerce sales, with 40% of the top quartile of shoppers using it.

Criteo found that non-optimised websites convert about 1.6%, while optimised is converting 3.4%. More surprisingly, apps convert 1.7 times better than PC websites and more than twice that of mobile websites. If you can get people to the app.

The key is that optimised sites and apps both play to the convenience of the moment and, if they are nicely designed, are so easy to use that they are encouraging people to buy, believes, Jason Morse, VP of Mobile Products at Criteo.

However, the biggest challenge retailers face is that cross device usage is now the norm for 41% of shoppers. "Cross-device purchasing is huge. In 40% of purchases, consumers use multiple devices to visit the same retailer prior to purchase," says Morse. "The trend is similar across all devices, where cross-device transactions are significant irrespective of the purchasing device. This high level of cross-device purchasing shows the need to now match users across devices. Otherwise, it's difficult to understand the ROI of paid marketing, or deliver a seamless consumer experience."

APPLE PAY IN THE UK

UK shoppers will be able to use Apple Pay for the first time as it launches in the UK with retailers including Ocado, Marks & Spencer and Waitrose among the first to use the service.

The launch was confirmed at Apple's Worldwide Developers Conference, where Apple said the service will be available for use at more than 250,000 locations including branches of Marks & Spencer, Costa, Waitrose and Transport for London.

More than 70% of credit and debit cards in the UK will support the launch, it is reported.

MasterCard and Visa users will be able to use the new payment method, which relies on fingerprint recognition to authenticate transactions, from July. Owners of an iPhone 6, iPhone 6 Plus or Apple Watch will be able to use Apple Pay in shops using contactless technology, authenticating with their Touch ID, while app purchases will be confirmed using a fingerprint or passcode via these devices as well as iPad Air 2 and iPad mini 3.

RE-DESIGN FOR HOF

House of Fraser has re-launched its transactional iPhone app – the most significant design change since its launch in 2012 – bringing it into line with the rest of its 'mobile first' digital strategy.

The updated app boasts a completely new design, complemented by an improved customer journey, facilitating an even smoother and faster check-out time. Enhanced push notifications allow for a more personalised and relevant experience for all customers. Members of House of Fraser's Reward Programme (Recognition) can sign into the app, negating the need to carry their physical Reward Card to collect points and view offers each time they shop.

The app also allows customers to quickly and simply add products to a revamped wish list from anywhere within the app, and boasts key features, such as barcode scanner and personalised stock locator.

Andy Harding, Chief Customer Officer at House of Fraser, explains: "With over 60% of online traffic now coming from touch screen devices, the re-launch of the app answers the needs of increasingly sophisticated customer shopping habits. The integration of Recognition is a significant step in the development of the app as the glue that knits together the online and offline experience for our customers."



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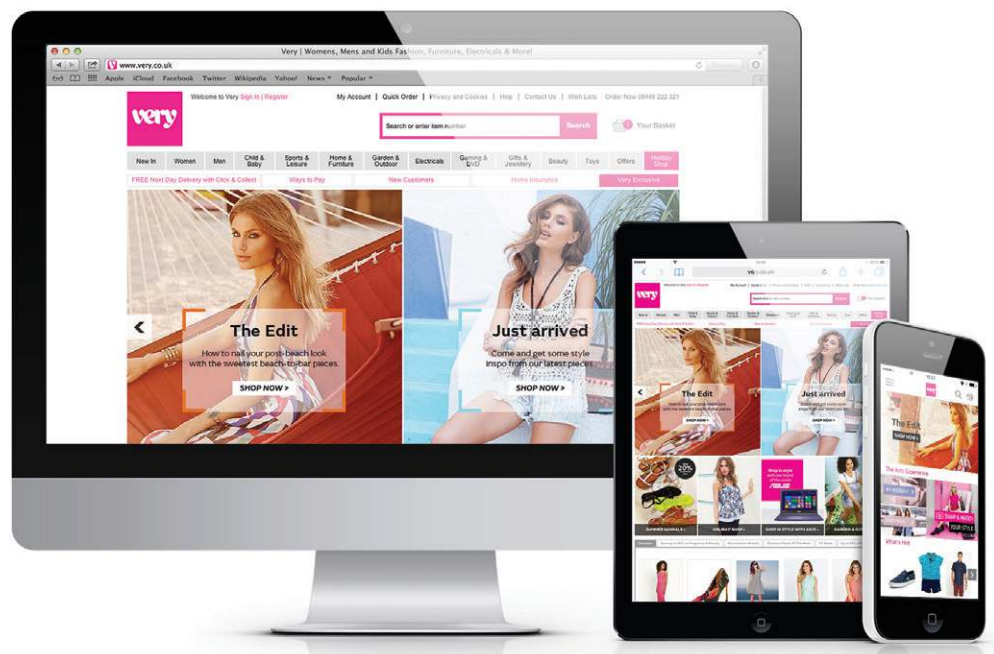
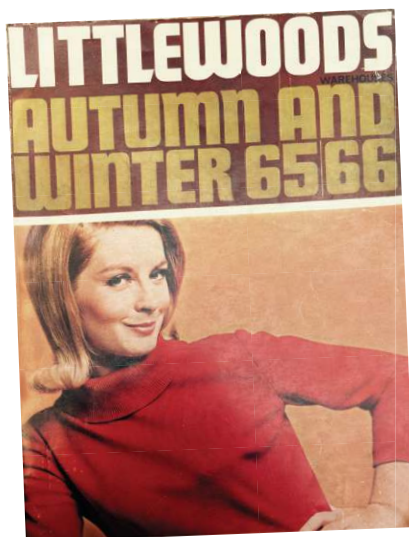
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Shop Direct: making good things easily accessible to more people

Announcing the end of the Littlewoods catalogue, Shop Direct has called time on an eighty-year history while fully opening the door to 1:1 digital personalisation.

Emma Herrod speaks to the company's Deputy CEO, *Gareth Jones*, about the changes.



Shop Direct's journey shows the evolution from catalogue to personalisation online.

SHOP DIRECT has grown out of the catalogue businesses of the Littlewoods and GUS groups, which offered credit facilities that enabled shoppers to buy items and pay off a set amount each week. From 15 contact centres, 17 brand fascias and lots of employees across different headquarters, the company has undergone a major transformation in recent years.

Brands have been integrated, contact centres closed and the headquarters of what has become the Shop Direct Group centred on a former aircraft hangar at Liverpool's old Speke airport. By 2010, 75% of the company's sales came from online and the migration of customers to digital channels has continued apace. It has since replatformed to ATG10,

and mobile has taken over from desktop with more than 70% of traffic now coming via this channel and over half of sales.

The company launched the Very.co.uk digital department store back in 2009. It has been developing the brand and during London Fashion week in February this year unveiled Very Exclusive to bring top-end high street and aspirational labels to its credit customers. With a more inspirational, content-heavy approach, the site – which is completely new and different to its others – includes items from 150 brands including Marc by Marc Jacobs, Karl Lagerfeld, Joseph and Karen Millen. According to Gareth Jones, Deputy CEO and Group Chief Operating Officer at Shop Direct, it has been well

received by shoppers: “It’s going well, as planned: it’s working.”

He adds that the company continues to review the assortment; designer handbags, shoes, belts and scarves are all selling well.

Brands are queuing up to come onboard; Whistles, LK Bennett and Paul Smith are the latest names to appear on Very Exclusive for the autumn season. “We’re surprised at how well it has been received by brands,” says Jones, who reveals that they’ve had to turn down some labels wanting their merchandise to be offered on the site.

Shop Direct is coming into its own as a go-to retailer rather than being seen as a necessary place to shop by consumers needing its credit offering. Although its origins are in the credit market, it is now seeing an increase in ‘cash’ customers – those who pay via debit or credit card or PayPal – with most new ones paying for their purchases as they place their order. “It’s the biggest part of new business,” says Jones, adding: “It’s no surprise people are turning up with their debit cards as we become a better retailer.”

MISS VERY

As with every retailer today, Jones says that the customer is at the heart of everything it does. That customer even has a name – Miss Very – and she, along with various other personas, is displayed around Shop Direct’s offices to remind everyone of who they are and to strengthen their connection with them. Miss Very herself is in her mid-twenties upwards with a household income of between £17,000 and £27,000. She buys for her family and home before herself but loves brands, which is why the company continues to increase the number available via its Very.co.uk site. It’s part of its mantra of ‘selling good things, easily accessible to more people’ as Shop Direct works towards becoming a world-class digital retailer. “Everything we do relates back to it,” says Jones of the company’s promise to its customers.

KNOWING THE CUSTOMER

The big push at the moment relates to the ‘easily accessible’ part and is what Jones refers to as “the secret sauce going forward”; using the data it holds on customers to personalise the experience – not just in terms of navigation, products shown, messaging and recommendations but the journey itself and all in real time.

Shop Direct knows a lot about its five million

“Cash customers are the biggest part of new business”

customers. “We know who they are and how they pay,” says Jones. The company also knows how much they can afford to spend – especially with new affordability rules governing how financial companies assess whether shoppers can be given credit, how much and whether they are able to pay it back.

Using a cloud-based Hadoop data environment, which the company refers to as its Data Hub and was developed in-house by its IT team, Shop Direct will be utilising the information to increasingly personalise the service for customers. Jones explains that it has travelled to Israel and Silicon Valley to consult leading tech companies while also speaking with people in industries that are “born out of data,” such as gambling and telecoms. Because the Data Hub is based in the cloud it means that it’s free and agile enough to be pulled into the front end.

Sitting on top of this is a data scientist sandpit from which the in-house team can look for patterns. Jones explains how Shop ▶



Direct has invested in SAS Analytics from which it can build algorithms to work with the granular level of data it holds in order to develop the customer experience. The company has also invested in a SAS rules-based engine. His view is that while the technology is available to everyone, the secrets are within the algorithms and the responses to them. By building and testing the algorithms themselves, he believes that Shop Direct will be 2 – 3 years ahead of the rest of the industry.

The company plans to use this data to offer the world's most personalised digital stores, giving customers a better experience in real-time, initially when they visit the Very site but ultimately across all communications and touchpoints.

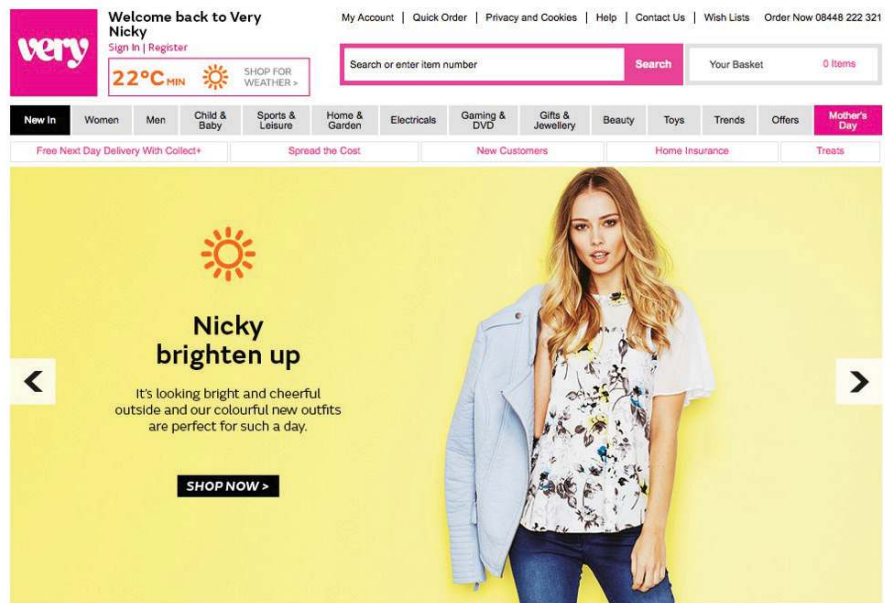
PERSONALISATION

Alongside the data team, a personalisation acceleration team was put into place eighteen months ago to work on specific issues on Very. The team, which comprises staff from head office, IT, marketing, ecommerce and data, have worked on a project that's resulted in each customer being served up one of 1.2 million different homepages when they visit the site. A large amount of testing and learning has been carried out and this is now ready to be taken into real-time personalisation online.

Everything from messaging, to navigation order, categories, brands, delivery and sizes displayed is personalised to the user, along with the actual assortment on gallery pages and product recommendations. Even the customer journey can be personalised to an extent.

This means that the twenty-something who mostly shops with Very for fashion items will be greeted with their favourite brands on the homepage whilst another shopper who has recently been purchasing homeware will see electrical and homeware offers. The 1.2 million versions of the homepage that it can serve up to its customers is based on which of the Very suite of promotional messages is used and in what position.

Even something as simple as the weather is used along with a person's name, if it's known. By the end of 2015, the number of possible homepages will have risen to 3.5 million. It's all based on segmentation and propensity models with the algorithm



producing 200 million promotion affinity scores which rank the relevance of offers for each customer.

Tailored homepages are just one part of Shop Direct's major push into personalisation. The navigation across all of its websites alters according to the browsing behaviour and purchase history of individual customers, so they see an order to the different department categories based on their relevance to them. Customers who regularly search its sites for children's items, for example, will be presented first with the toys and the child and baby categories, at the far left of the navigation panel.

This initiative alone has delivered a significant uplift in conversion and has added £5m to its top line in its current financial year.

In addition, Shop Direct's suite of algorithms also recommends categories that the customer is likely to be interested in based on the behaviour of similar shoppers. For example, customers who browse furniture regularly could see the homewares category prominently, regardless of whether they've shopped it before, because it has proved popular with similar shoppers.

Also, the assortment shown on gallery pages is personalised to each customer with Very able to get down to a one-to-one level with customers. "Customers are drowning in choice," says Jones. They end up having to wade through many dresses on a page to find the exact red dress they want to buy, only to find out that it's out of stock in their size once they've clicked through to the product page. Personalisation, therefore, is tackling a real customer problem and Very aims to

make it easier for everyone to find what they are looking for. If the shopper's clothing size is known, then items which aren't available in their size don't appear; if their preferred brands are known, then items from those brands are shown first.

Obviously, it's easier to provide personalisation if the customer has signed in since the system can use all the information it has about them. Shop Direct is also working with cookie and IP data to personalise the experience for every shopper to some extent. Plus it uses retargeting through the myThings mobile-compatible ad platform, so it can collect more data from shoppers based on how they responded to this.

Shoppers can therefore be tracked across device, using myThings and the Speed-Trap data capture system from Celebrus Technologies to append IP addresses.

The personalisation initiatives are expected to add over £20m in sales for Shop Direct in its current financial year.

Jones warns, though, that the profitability of a customer cannot be used as the main KPI. "Engagement means happier customers," he says, and improving the customer experience and removing friction means customers are

more satisfied. "Lifetime value is a goal, but we do need to make sure we are using data to create an experience that's more personalised to give a better experience."

Where Shop Direct is changing customer journeys it is asking them to rate the new experience by picking a face from a series of images with expressions ranging from frowning to smiling. Jones believes that ultimately a better experience in the long term leads to increased profits.

TESTING

Shop Direct isn't leaving anything to chance or to gut feeling. In January 2014, it set up its own UX lab at its Liverpool head office so it could bring testing in house and ramp it up. The lab comprises two rooms connected by a one-way mirror and equipped with cameras and microphones. On one side of the mirror is a room set designed to make the customer feel at home. It includes a sofa, TV and desk with laptop computer. Shop Direct people can watch them from the other room, see closely what they are doing with the keyboard, use eye tracking to discover what they are looking at or turn on the TV and watch them second screening from the

“Customers can be served one of 1.2 million homepages”



sofa. What is also making a big difference is that the project owner can be involved in the tests, watching and listening to customers.

Everything is now tested before it goes live on the site. With mobile accounting for over three quarters of traffic and more than half of sales, Jones explains that the company runs a mobile first testing strategy. Jones also points out that 50% of what happens on mobile is on the product page.

Rather than testing a number of changes with customers in one session, each one is tested individually, followed by A/B testing before anything goes live on the site. Around 100 tests are run each month with one customer being monitored in the UX lab at a time. Although when looking at furniture on the site, the UX team bought in couples so that their interactions could be viewed together since that is how many furniture purchases are made. One thousand tests will have been run by the end of this year and testing will be ramped up to 150 a month over the next financial year.

“It takes away ambiguity,” says Jones of the testing, while also removing ‘hippo’ (highest paid person’s opinion) decisions. The only person whose opinion matters is Miss Very, the core Very customer. Even then, sometimes what Miss Very says she does is different to how she actually behaves online.

Gut feel and opinions are what has driven the tests to be run in the first place but now the company always has the facts to back up those opinions. The UX lab throws up issues that haven’t been spotted elsewhere while testing other parts of the site, so there’s a continual list of things that could be tested that need to be prioritised. “About a third of tests win, one third fail and a third are inconclusive,” comments Jones.

FUTURE

Moving forward, Shop Direct is strengthening its branded product offering by adding new names to Very as it strives to keep market share and head off its main competitors, Next and Argos. Warehouse, Coast, River Island, Wallis and Miss Selfridge are the latest to join the 900 brands sold on Very, and Very Exclusive is fulfilling expectations, according to Jones.

Business focus is now firmly on the two main brands of Very and Littlewoods as it “manages the decline across some of the other heritage brands”.

Jones says that the company has no plans to open physical stores, saying “we’ve not been encouraged by what we’ve heard from

THE FINAL CURTAIN

Woolworths, the brand that Shop Direct bought in 2009 and relaunched as an online-only brand, is being wound down with customer accounts moved across to Very as the company focuses on investing in its bigger brands. While Woolworths has grown steadily under Shop Direct’s ownership, it is its smallest digital department store and there’s a crossover between the two brands with more than a third of Woolworths customers holding a Very.co.uk account.


Ladybird has helped make Shop Direct’s digital department stores a destination for mums, says the company. It is the group’s largest childrenswear brand with sales soaring under its ownership.

Growth has been driven by its performance at Very.co.uk, where Ladybird sales have surged 200% since the acquisition.

others”. The company has a big opportunity in the UK. It kick-started its transformation from a catalogue business into a world-class digital retailer two years ago and the strategy has been paying dividends; the retailer recorded a 512% jump in pre-tax profits to £40.4m in its last financial year. The growth is driven by the performance of Very.co.uk, which now turns over more than £800m per annum.

Over the past 12 months, the combined effects of personalisation and the connected programme of testing has led to an increase in sales of close to £32m. This has now switched to real-time and the company aims to keep site speed under the two-second load time. It already has plenty of chances to communicate with customers on an individual basis when it thanks them for their order, keeps them apprised of their delivery and talks to them about their account, and personalisation will take everything to a new level with personalised messaging seen as a major opportunity.

Shop Direct’s customers are happy for it to use the information they hold on them to ease their journey and set default options but, as Jones explains, the company is wary of the fact that they don’t want this journey interrupted. “They just want the right experience from day one,” he says, so it has to get it right first time. With eighty years’ experience and the customer driving every change, it looks like Shop Direct is well on its way to meeting its digital ambitions.

Hear more from Gareth Jones when he’s joined by fellow Shop Direct Directors Jonathan Wall, Director – eCommerce and Dan Rubel, Group Strategy & Communications Director, in a unique three-way Keynote to open the inaugural eDelivery Conference on 13 October. Discover more at www.edeliveryconference.com 



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FULFILLING THE MULTICHANNEL PROMISE

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SHOP DIRECT



Gareth Jones, Deputy CEO



Dan Rubel, Group Strategy & Communications Director,



Jonathan Wall, Director - eCommerce,

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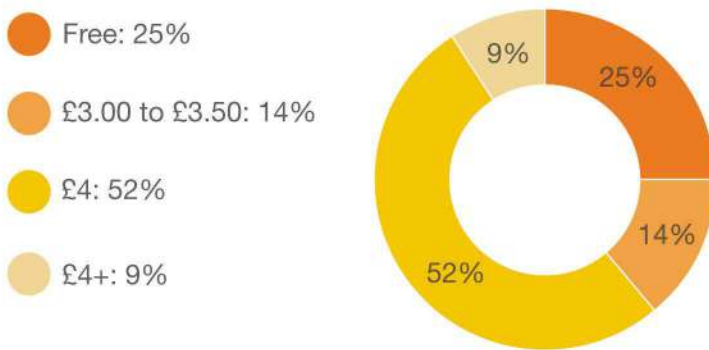
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Is fashion delivering the perfect experience?

It has been some years since online fashion retail really took off, enabled by better content and, crucially, better returns policies. *Joe Tarragano*, Director, Transform examines the sector's position today.

Fig 1. Cost of standard delivery



INNOVATION IN fashion retail online continues apace and best practice remains ever evolving. For some, such as Boden which has no mobile offering, this means that their once-leading offerings have started to fall behind. Shop Direct has seen its digital transformation lead to a great customer experience. While others have simply carried on as they always have done, with John Lewis's rock-solid experience and Schuh pushing the boundaries.

Today's truly successful omnichannel retailers need to have a customer experience that is aligned end-to-end. With an expanding range of fulfilment options, channels and global markets, knowing your customer well in order to identify your brand's points of differentiation is key. We see this in our research study, with some of the variations reflecting conscious customer, commercial and operational choices.

Click & collect will be one of the defining elements of peak 2015. Expected to be the fulfilment route for up to 65% of some retailers' online orders, its impact on store operations will be huge. Surprisingly, 28% still don't offer this service including Jack Wills

Fig 2. Retailers delivering to key growth markets



and Hollister and they need to be prepared for the impact on business if they introduce it.

The commercial analysis and customer context also explains why neither Burberry nor Net-a-Porter need to cluster around the standard delivery fee of £3.99 (figure 1). Given the product price points, the postage charge is less material, and more expensive packaging is not just affordable but also a key part of the experience. Some retailers though are clearly off the mark, and one can presume that their customers will come to recognise, and potentially resent, the disparity.

Internationally there is much greater variability in fulfilment charges. While it is easy to point to Clarks or Superdry and laud the free delivery, again one must consider the commercial context and wonder if money is being left on the table.

Along with mobile, international is a core pillar of many retailers' growth strategies, and 91% sell internationally (52% in more

Fig 3. Mobile site speed performance

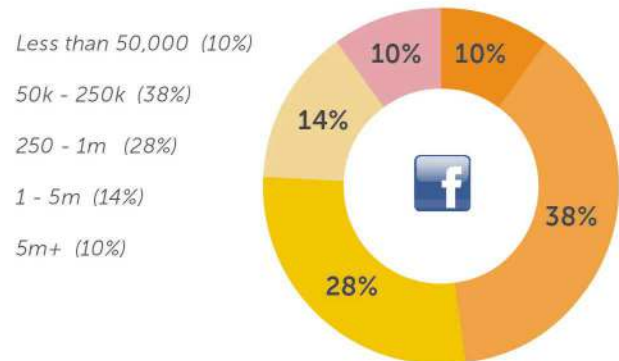
Score	%
Less than 50	10%
50-60	28%
60-70	28%
70-80	31%
80+	3%

than 50 countries). Some lead the way on the number of countries served, the localisation options developed and the propositions in place. However, there is clearly much to be done before the baseline is at a reasonable level: only 63% sell to China (figure 2), almost a quarter take more than a week to deliver to the US and almost half have no country-specific website.

The mobile pillar also displays less consistency than might be expected, given how long it has been on the digital agenda. Whether a native app is required is specific to the retailer, but where they have been built, 59% don't support Android. Apple may be more popular amongst the older and more affluent consumers and users evidence greater levels of online purchasing, but globally Android is used by 3 times as many as iOS. App development is also at an early maturity stage, with users scoring iOS apps just 3.3/5 on average. With only one third of the retailers in our survey scoring more than 70 on Google's mobile speed performance tests, we must hope for greater focus on the underlying architecture.

Leadership on any of these factors today may not ensure leadership tomorrow. Reviewing the product detail pages, one would have anticipated that trailblazers such as ASOS would have scored more highly. There is very substantial variation in design treatments and, in our opinion, very significant variation in usability, but this study has tried to avoid subjectivity by focusing on clear, factual analysis. What is obvious is that not all retailers make readily available the


Fig 4. Number of Facebook followers



types of content that fashion buyers need at point of purchase: reviews, returns policies, size guides, recommendations and images for each of the product's colour variants.

Also, for some retailers, the search experience hasn't been kept current. Best practice is now focusing on great use of the search bar, adding type-ahead that includes images and product information, ever expanding (and more usable) facets and better use of screen real estate for the results sets. Not all retailers have embraced this.

Social sharing is also less prominent than might be expected and indeed retailers' social media strategies are quite different. Absent data, one could argue on the demographics (eg an older, more male audience might value social less). However, there is scant evidence for this and limited explanation for the choices made, eg Burton (little social activity), Next (significantly more social activity but limited sharing options) and Moss Bros (little activity, significant sharing).

These are a few of the insights from the research. This study reviewed 93 different components across the 10 major categories, and if there was one over-arching conclusion it would be this: no one retailer currently has a perfect experience and for most the changes needed are significant. With standards continually advancing, it remains the case that the truly successful multichannel retailers will be those that understand their customers' priorities, have the culture and agility to do something about it, and are able to execute on it efficiently and in a commercially robust way. 

“No one retailer currently has a perfect experience and for most the changes needed are significant”

Nine Technical Website Tips to Help Shoppers Become Buyers



By Beth Perry, Commerce Marketing Blog Editor

YOU'VE INVESTED time and money in creating a product range that's second to none, and even more on advertising and marketing, but you're still not seeing the online sales you'd like. Worse still, people are visiting your website but leaving after browsing only a few pages, or they add items to their shopping basket only to abandon it altogether.

Sound familiar? If so, you need ways to ensure your site is increasing shopper engagement and helping them make it all the way through the checkout process.

Take a look at these technical basics:

1. EVALUATE YOUR PAGE LOAD SPEEDS.

How fast do your pages load? If your website is less than a few years old, you probably take it for granted that it will pass this test. But be honest – when did you last test them? And have you tested them across all devices, not just on desktops? Slow load times can drive busy shoppers away and may reduce your ranking in search results.

2. ESTABLISH CLEAR BROWSER REQUIREMENTS.

To encourage conversions, your site must look good and perform well on all the major browsers on all key devices. Make sure your site developer understands your company's platform and browser requirements and updates your site accordingly.

3. BE CONSISTENT.

Some shoppers prefer to browse on their tablets in front of the TV rather than booting up their laptop. Others may shop on their mobiles but feel more comfortable using a desktop or laptop to complete the transaction. Your site should offer a consistent look and feel across devices and browsers and make the transition between devices easy.

4. THINK ABOUT SCREEN SIZE.

To give consumers the best possible experience, it's imperative that your website be fully responsive. If it isn't, your site will also likely suffer in mobile search results and overall site traffic.

So if you haven't already addressed this issue, it's time to get started. Your business may depend on it.

5. TEST, TEST, TEST.

Take the guesswork out of optimising your website by incorporating A/B testing. It helps you validate your changes by showing exactly what effect they have on your key performance indicators. Even when you see negative results, you can learn from them and use that information to influence future changes.

6. KEEP IT LIGHT AND EASY.

Some shoppers are nervous about buying online. They may lack confidence in buying from a website they haven't visited before or a vendor they've never heard of. To attract their business, make your checkout process clear and easy to follow. Explain the process on your home page and in other obvious intersections on the way to checkout.

7. OUTLINE PAYMENT AND DELIVERY OPTIONS EARLY IN THE CHECKOUT PROCESS.

There are few things more irritating than getting to the final checkout only to find that delivery costs are more than you expected, your item won't arrive in time or your payment method isn't accepted. For a first-time visitor, this may drive them away forever.

8. INCLUDE UNIQUE SELLING PROPOSITIONS.

It may be hard to differentiate your product from your competitors' – you may be selling the same product at more or less the same price. But your product may be more compelling when paired with free delivery, more attractive

payment options or a price promise. Make these offers clear well before checkout. If not generally across the site, then at least feature them on individual product pages.

9. OFFER CUSTOMER SERVICE OPTIONS AND CONTACT DETAILS.

There are plenty of benefits to getting your customers to buy online, but it's better that they buy from you through another channel than not at all. If a shopper has questions about a product or the purchase process, make it easy for them to reach out to you. Provide help and support, such as telesales or chat. Shoppers may be more apt to buy once their questions have been answered.

USE THESE TIPS TO MAKE IT PERSONAL

These tips can help you can make the shopping experience uniquely suited to each shopper. Remember that new and returning shoppers have different needs and expectations when visiting your site, and you should address them both. This requires an infrastructure that can identify your customers and then personalise the site accordingly.

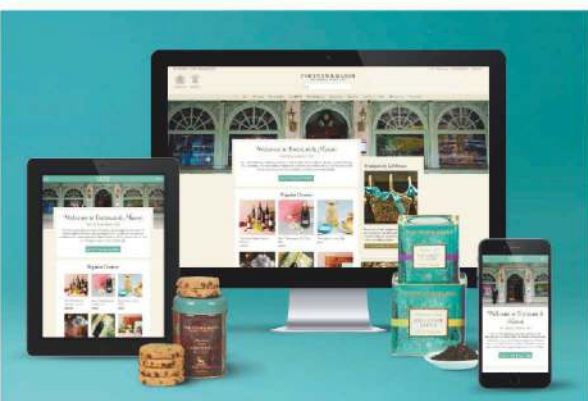
New shoppers may need more encouragement to buy and more information about payment and delivery options early in their visit, while existing customers may find too much of this information annoying and see it as clutter. They may respond better, or buy more, if they see other messages or linked products.

Personalisation is a broad topic, but you generally need to study the journey for many types of shoppers and consider how you can improve and personalise their experience on each page. Build your site to allow the flexibility to change, and continue A/B testing to determine the best strategy.

Originally published on Bronto's Commerce Marketing Blog.

Retail review

As customers and retailers look across all touchpoints rather than siloed channels, so IR retailer reviews look at the entire retailer's eco-system of website, mobile, the use of digital in store and their overall strategy. Longer in-depth analysis of the four areas can be viewed online at www.internetretailing.net. This issue our reviewers examine Fortnum & Mason.



RETAIL STRATEGY 15/25

EMMA ROBERTSON, MANAGING DIRECTOR, TRANSFORM

Fortnum & Mason is a retail brand like no other and the new digital experience is very F&M: understated, impeccably on brand and well supported. A cautionary note, however. While conversion rates on mobile have grabbed headlines, it must be noted that F&M has only recently supercharged its digital efforts and therefore any uplift will come from a relatively low base.

It fails, however, to deliver on multichannel since online orders cannot be returned to store and Click & Collect only operates at the Piccadilly branch and not at St Pancras or Heathrow.

So, whilst the new digitally enhanced Fortnum & Mason may not yet be at the forefront of multichannel retail, it is progressing fast and hitting the important needs of customers along the way.

WEB EFFECTIVENESS 20/25

JESSICA CAMERON, USER EXPERIENCE CONSULTANT, USER VISION

Fortnum and Mason's new responsive website successfully

conveys its exclusive brand identity, looks equally good on both desktop and mobile, and makes it very easy for users to purchase its high end products. Unfortunately, these products are sometimes difficult to find using the site's navigation and search functions. Users will have a good experience as long as they do not worry too much about what they might be missing, but improving these features could really enhance customer confidence and bring their experience up a level.

MOBILE 20/25

ROB THURNER, MANAGING PARTNER, BURN THE SKY

The fully-responsive website is Fortnum & Mason's first major digital redevelopment in four years. Built by Red Badger using open source software Facebook React and Spree Commerce, the site saw a rise in mobile traffic over the first month of 77% year-on-year, while mobile conversions improved 57% over the same period.

What's more, in just one week, calls to the Fortnum & Mason customer service team reduced by 18% compared to the same period 12 months prior.

While Fortnum & Mason has chosen not to enter the native app space to date, its redesigned website delivers a comparable experience in terms of speed and device optimisation. While website functionality could benefit from minor tweaks here and there, what the company has achieved for just £1.2 million – compared to the £40 million spent by Selfridges to “future proof” its online business – is impressive. It doesn't tackle

RETAIL LEADERBOARD

John Lewis	83/100
M&S	80/100
House of Fraser	78/100
Burberry	78/100
Debenhams	77/100
New Look	77/100
Argos	75/100
IKEA	75/100
Topshop	70/100
Very Exclusive	70/100
Fortnum & Mason	70/100
Oasis	66/100
Google Play	60/100
Boots	59/100
Majestic Wines	56/100
J Crew	50/100
Morrisons	27/100

innovation for innovation's sake and other retailing whipper-snappers could learn a thing or two from the great-great-granddaddy of British luxury goods.

INTERNET RETAILING IN STORE 15/25

REETA MCGINN, ASSOCIATE DIRECTOR, JAVELIN GROUP

As a high end retailer with few stores and largely international customer base Fortnum & Mason is fully aware that they may have fewer chances to capture the customer in store but a strong opportunity to retain them online. As such, communication of digital channels in store is relatively strong compared to other luxury retailers who tend to shy away from cluttering marketing material with omnichannel messaging. The Fortnum & Mason website URL and prompts to shop online are seen throughout the store, on the majority of point-of-sale materials, signage and at till points where they have leaflets and posters eagerly promoting the retailer's brand new responsive website.

Looking forward, self-serve iPads or digital screens displaying rich content as well as further integration of a wide range of mobile capabilities would be welcome additions to the current digital retail strategy. 🇬🇧

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A little bit digital

To a new employee in retail it would appear that digital is now fully incorporated into our multichannel business. However, the assimilation is not yet complete and *Ian Jindal* considers whether this might leave us in an exposed position.

AT THE dawn of ecommerce, the new opportunity was seen as a 'tech' discipline, cloaked in hardware, pipes and connections. However the underlying revolution comprised software, data, interfaces and interactions – all digitally-mediated. The web was not bounded by the computing device used for access.

The major changes were that the software and processing became independent of the device (a simple browser with processing at a remote server – a process continued in cloud services now); data that could flow and be changed in many locations. As we entered a world of transformation (data, processes, code) and interoperation (APIs, protocols and flows) we entered a world of new opportunities and new demands. It was similar to single-celled organisms coming together to create a complex life-form.

One side effect of the extensive and ready interaction has been that the 'digital influence' has bled into other areas of our business - marketing, finance, supply chain, even into product development and buying.

This digital 'leaching' can be seen around the board table as we discuss matters with a digitally-originated world-view. We talk of agile approaches (popularised by a software development approach) and interfaces (from object-oriented programming). We nod whenever 'test and learn' is mentioned, and process and flow management are no longer phrases for engineers and technicians alone.

The most significant change however is the rise of "Service". Everything is now offered up to customers and to colleagues as a service. Software, hardware, data as a service and even 'service as a service'. As our customers increasingly get used to this approach - pre-chewed capability - and so do our many colleagues, each from their own supplier base, the pressure will be upon boards to serve each other and collaborate more effectively. Business as a service?

As leaders we have a further challenge within our own teams. We're the first management generation where it's a given that our staff are more expert than us, always, and in every area! No longer do we lead by having done it before. No longer do we 'know more'. Rather, our role is more like a conductor of an orchestra. We need to understand and appreciate each instrument's contribution as well as the virtuosity of each artist. Commercial leadership is the ability to turn these varied talents into a harmonious directioned whole.


In considering the generic challenges we've created a Digital Leadership Transformation Framework (of which more in future issues) with nine leadership levers. The first focuses upon articulating a business operating model with digital capabilities throughout the business. Another is the key role of 'permissioning', where you allow and support those more expert than you within the business to succeed and

deliver upon the business operating model. The third stems from this permissioning and can be seen as 'permission to fail'. This is a vital correlative to the desire to test and optimise. If we believe in the benefit of continuous test and improve then we also need to allow staff credit and support when those tests are glorious and beneficial 'failures'. We need to support 'failing well', failing regularly and sharing failure as a well to support success.

Our new challenge is to drive whole-business adaptation. In evolutionary terms an individual organism does not evolve, it adapts. An elephant cannot transform into a butterfly, no matter the size of its ears nor the vigour of its flapping. We need to help our organisation be continually adaptable in response to digital opportunities.

This can't be a half-hearted attempt. We can't keep digital in a silo.

We can't be naive about digital: it's not the only skill we need, nor is it the only or final disrupting force to our business. However, it's now time to embrace digital as a full part of the modern skills synthesis.

Ecommerce gave us a start in digital transformation, and multichannel has extended that further into the business. With our staff and customers fully immersed in digital to the point where it's invisible, as leaders we are either digital through and through or we are out of step with our customers and commercial competitors. We can no longer be 'a little bit digital' any more than you can be a little bit pregnant or a little bit honest. 

Who is leading in operations & logistics?

The latest InternetRetailing Dimension Report examines the area of Operations & Logistics to discover which retailers have the winning formulae when it comes to delivery, collection and returns.

OPERATIONS AND logistics, once behind the scenes, are now very much in the full glare of the customer view. Shoppers who have ordered online not only want to take control of where and when they'll get their purchases – but to track them along the way.

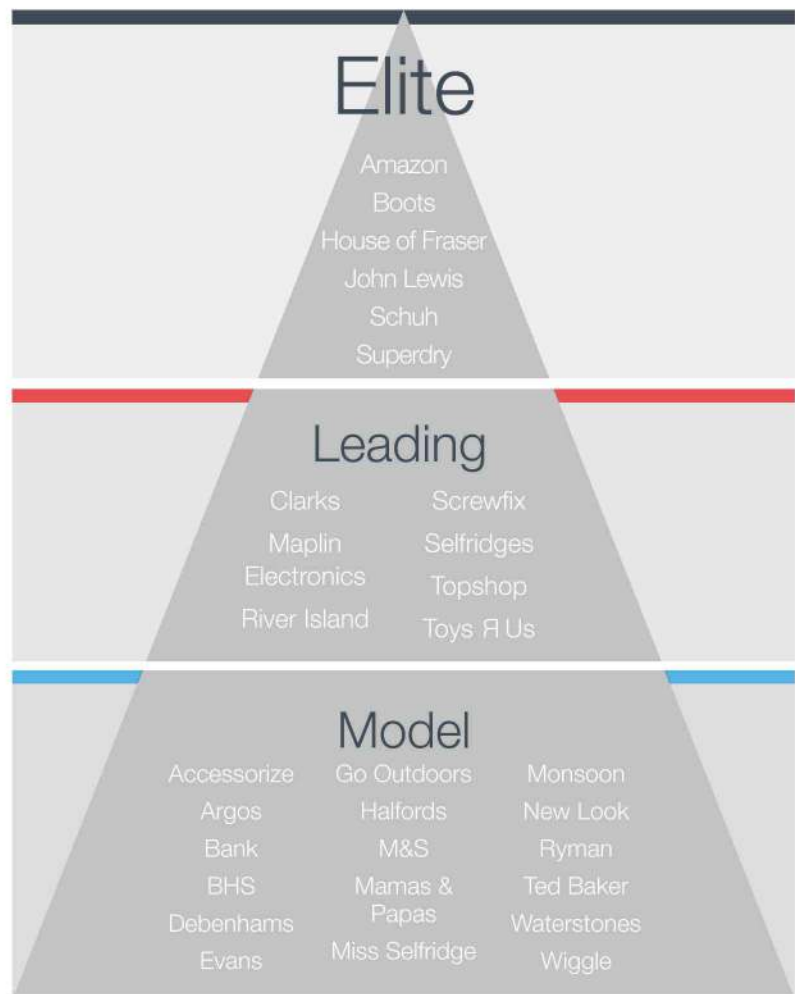
Delivery, thus, is at the heart of the online promise and today's leading retailers have handed consumers control. They've worked closely with the logistics industry to give customers the final choice of where they pick up or take delivery, and how they return any unwanted goods.

The best retailers have transformed expectations. By showing what is possible, they set a level that becomes the minimum competitive level. Fast delivery to a convenient point is now largely taken for granted – and the boundaries are constantly being pushed.

But such innovation comes at a cost and it's important that such sterling service does not go unrewarded. In high street retail, we calculated that the fixed costs of building a shop were paid up front, with retailers moving into profitability once that amount was covered.

In cross-channel retail, each parcel sent comes at an unavoidable cost, even when the scale is massive and the individual cost is low. To achieve, and to retain, profitability, operations and logistics must function consistently at a high level. This is an area that holds within it some of the most important aspects of cross-channel success, which retailers must master to succeed: capability, experience and profitability. That's why the IRUK 500, 2015 Performance Dimension Report on Operations and Logistics is critical reading. You should have received a copy along with this issue of InternetRetailing and you can view the digital version online at internetretailing.net/iruk.

In the report, its Editors, Jonathan Wright and Chloe Rigby, explain the thinking behind the report, and how IR's research team has



gone about measuring the industry's deliveries, collections and returns. IR Knowledge Partners also share their insights to extend the scope of the in-house research.

Here, InternetRetailing Senior Researcher Martin Shaw considers what the IRUK data tells us about delivery, collections and returns.

UK retailers today work hard to ensure that customers receive the goods they've ordered in the most convenient and cost-effective way. Just as importantly, retailers try to ensure that it's as easy as possible for customers to return unwanted or faulty items. What though sets the

best-in-Dimension retailers apart – and how is that manifest in the three key areas of delivery, returns, and collection?

MAPPING DELIVERY

Retailers in the IRUK 500 have differing approaches to fulfilment. This is because different retailers target different kinds of customers who have different interests and priorities, and fulfilment options and operations develop in response to these consumers' needs. While it may be important, for example, to get a new item of clothing delivered in time for a party at the weekend, consumers may be more patient when ordering a hard-to-find item from a niche retailer. Nonetheless, it's striking that even among mainstream retailers, there's a surprising divergence in the number of delivery options on offer. Clearly, for whatever reasons, some retailers see offering delivery options as a point of differentiation.

This leads to an intriguing question: is it fair to say that more options and faster fulfilment are definitively 'better' from the customer's point of view? And if so, is the underwhelming showing of some of the UK's largest retailers in this area a transitional problem, or, have these companies left the field in the battle for customer loyalty, yielding it to the likes of Amazon?

A recent PwC report found that just 16% of businesses make money from 'multichannel', so perhaps a broader appeal within a diverse market begins with fulfilment efficiency. With that in mind, what is the most efficient delivery offering for a retailer to make?

In a recent webinar run by InternetRetailing's sibling eSeller.net, Chris Dawson of Tamebay suggested that, even for small retailers, the best proposition includes at least three fulfilment options. The first is the standard option with a low threshold for free delivery and a three to five day timeframe. There should be an expedited, if costly, next-day delivery option for those shoppers who need something urgently.

Rounding out this optimal set of delivery options is a 'no rush' option, free for any order value. This final option would appeal to both retailers and shoppers over busy sales days such as Black Friday, when most customers only require their goods by Christmas and delivery services can't otherwise cope with the spike in demand.

BEST PRACTICE RETURNS & COLLECTION

Turning to returns, top retailers offer customers easy, rapid and inexpensive

returns on unwanted or faulty goods.

These companies aim to minimise both the likelihood of a return being made, and try to cut the costs when this happens.

This has resulted in a retail landscape where ecommerce returns policies conform more to consumers' demands than ever before. But still not everyone is happy. Customers have come to expect a service that's both free and easy. A recent UPS study found that 54% of online shoppers read returns policies prior to purchase and are more likely to buy from stores that allow them to send goods back for free.


Compare this to IRUK 500 research showing that a majority of the UK's large retailers offer free returns and refund the original delivery charge. Are retailers responding to consumer demand, or are they fuelling that demand by increasing convenience?

It's evident from our research that even companies from the same sector have adopted very different returns strategies.

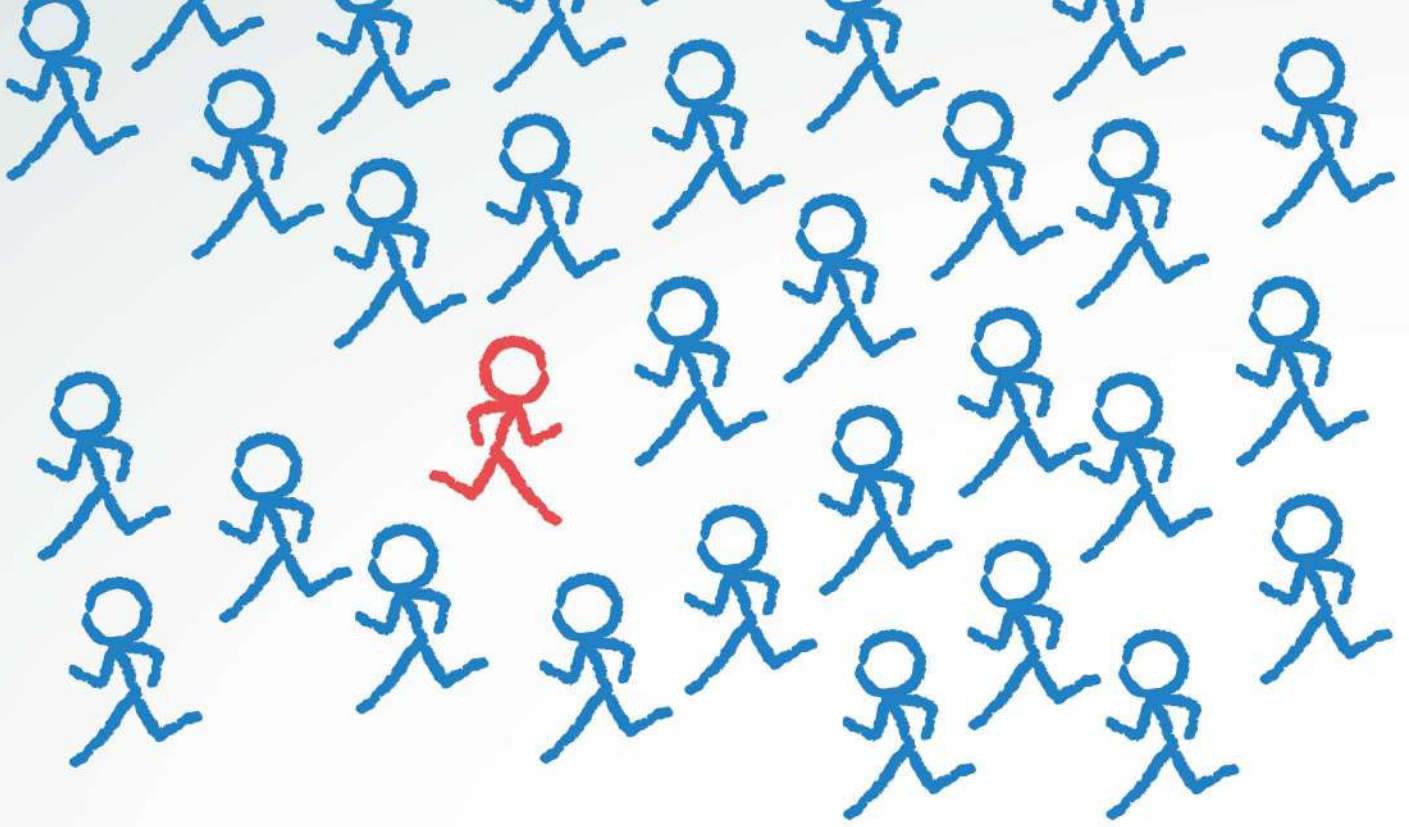
When it comes to click and collect, this service is only offered by 44% of retailers in the IRUK 500, and by 58% of the largest 100. It's a service that promises increased convenience for consumers, but also more efficient fulfilment: couriers can deposit dozens of orders at a collection point at once, without the risk of failed delivery. Some retailers offer click and collect from a store within the hour, highlighting the advantage multichannel retailers have in this area. Other options include third-party networks such as CollectPlus and collection points at train stations.

Top500 companies are fulfilling ecommerce orders and returns in different ways. Some appear more 'advanced' than others, perhaps because a strategic decision has been made to emphasise customer service in an era of transparent pricing.

By making fulfilment and returns faster and cheaper, retailers have in turn produced a more demanding consumer market, in a self-reinforcing cycle. This process is enabled by technology and can be expected to continue as ecommerce becomes more popular.

Our research suggests it's not safe to generalise about the state of logistics in the retail industry. Even among the largest companies, those in similar sectors are pursuing different strategies, and while the 'best' can broadly be measured by speed and number of options, success could well derive more from the retailer's cost efficiency than the customer's convenience. 

“Are more options and faster fulfillment better from the customer's point of view?”



My way

Retailers gather data on customers across all touchpoints and use it to communicate with them, build a relationship and personalise the experience. But what is personalisation in 2015 and how is it evolving? *Emma Herrod* investigates.

RETAILERS HAVE enough information to enable them to communicate with shoppers on a one-to-one basis. They also have systems that show them how every shopper behaves in each channel, linking their browsing and shopping patterns across online and offline channels; not just what they buy but what they look at, where, when and – just as importantly – what they haven't bought. How many times does customer x look at something at a certain price point before deciding to buy it; what trigger(s) would ensure that they actually make a purchase. The days of retailers sending a weekly email announcing the arrival of a new range of men's clothing because you once bought a present for your brother, or being recommended newborn baby nappies every time you visit a site for 5 years, should be over.

What does personalisation mean in 2015, though, and how is it being enabled by suppliers and used by retailers? When I interviewed people for this feature, the first thing they asked me was what I meant by personalisation. That was the first question on my list, too.

Personalisation means different things to different suppliers and retailers. To some, it's

the ability of algorithms to recommend and display products or categories on a website that a shopper has been viewing in their current browsing session, by incorporating past behaviour or by predicting what they might like.

To others, it's a messaging system which has moved past the time when including the recipient's name in an email was a sign of a leading retailer. Certain actions on the part of the shopper or the retailer will now trigger marketing emails, SMS or other marketing messaging, such as when certain products are viewed or the price drops.

For example, when Lovehoney introduced recommendations personalised to the individual user on the interstitial page between basket and checkout, the retailer saw a ten per cent rise in revenue overnight in what Joey Moore, Strategy Director at Peerius, refers to as "a step change in the business".

Personalising email marketing can push up open rates and click-throughs while also increasing the value of the channel. Australian fashion retailer Speciality Fashion Group (SFG) recorded an average campaign ROI of more than 1,800% when it introduced a campaign and analytics solution from SDL to run responsive, data-driven marketing campaigns. The SDL solution also helped to streamline marketing processes, reducing the time it took to produce electronic direct marketing from 24 hours to under two hours.

Majestic Wine saw a 15 per cent increase in online sales when it personalised and automated its email newsletter and other campaigns. It was also able to analyse and build segments in minutes to run more campaigns.

THE BIGGER CONVERSATION

Personalisation is about more than smart emails though. “Personalisation is all about delivering the right offer to the right customer at the right time using the right channels,” says Tasin Reza, Head of Optimisation and Design, Red Eye International.

Search, navigation, recommendations and personalised emails are just small elements of the bigger personalisation picture. It enables retailers to merchandise their store and enables shoppers to make the purchasing decision without have to go into a physical store. “If done well, you can ensure your customers buy the product they didn’t know they wanted,” says Peggy Chen, Senior Director of Product Marketing, SDL. “It makes selling online relevant.”

Content on the site can be personalised so customers see not only products that are relevant to them but also the best imagery or rich content, messaging and placement of items. It brings together content, customer and commerce. Shop Direct, for example, can serve shoppers one of 1.2 million possible homepages personalised to what the company knows about them as an individual. The company’s Deputy CEO, Gareth Jones, explains further in an interview on page 10.

Office Depot uses Monetate’s personalisation platform to dramatically increase on-site engagement by creating tablet-specific navigation for mobile customers, which grew revenue per session by 22%, and countdown timers to promote offers and run multiple campaigns in real-time, such as one for free next-day delivery. In four months, it ran 44 campaigns which boosted online conversion rates by three per cent to increase projected annual revenue by more than \$2.5m.

“For every dollar we spend with Monetate, I’m confident that we’ll see a 15x return on investment in 2015 and 2016,” says Jonathan Newman, VP eCommerce & Marketing Operations at Office Depot.

Scandinavian adventure clothing company Helly Hansen is another Monetate user. Its geo-targeting capabilities are paired with local weather forecasts to give specific onsite experiences for website visitors in different countries.

Personalisation can also extend to how the customer/retailer relationship is handled across all channels and touchpoints, with store staff having access to customer’s online purchasing history or in-store purchases being accessorised online.

VIEW OF DATA

All of this is based on one thing: data. SFG, for example, uses data that details customers’ behaviour across all of its brands, from the physical stores, to web and mobile sites, plus direct marketing and social media.

Often, this type of information is stored in different databases from multiple vendors so personalisation engines need to stitch the data together to get a single view of each customer. Only then can the experience be accurately personalised to serve a homepage based on their entry path with campaign items based on the target group into which they have been categorised. This identity stitching is something Monetate is currently working on.

By incorporating predictive analytics, retailers can tell not only what customers are likely to look at next but through which touchpoint. They can now interact with them in real-time, too, so “a single view is a must,” says Reza.

But can the customer base be divided into single segments so each customer can be interacted with on an individual level? For applications such as recommendations and marketing messaging this is possible as long as the data is sufficiently granular. However, it is still questionable whether it’s worth serving customers individually where content personalisation is concerned. Generally, the effort is not worth the reward, explains Alex Henry, Client Solutions Director EMEA at Monetate.

Reza believes that retailers have a fundamental responsibility to use the data that they collect about shoppers on their website if people have agreed that their actions will be tracked via cookies. He comments: “Relevancy is key. If it’s not, what’s the point?”

“There is a fine line between personalisation and being creepy,” he adds, and this is where testing is important. Before going live with changes, run A/B tests. An improvement in conversion proves that personalisation works for that particular segment.

Tim Callan, CMO at SLI Systems, a US company whose main solution is an evidence-based algorithm for site search and navigation, agrees that testing is important for personalisation. “It’s the difference between ‘I think’ and ‘I know’,” he says.

FLEXIBLE & ADAPTABLE OR RESTRICTIVE?

The general view used to be that once rules were in place – such as show only men’s clothing to men and women’s to women, give full price products priority over something ►

“If done well, you can ensure your customers buy the product they didn’t know they wanted”

that's been marked down – the data could decide what products to show to customers. This would have led to a mum who shops for the entire family being shown kids' trainers or dad's socks when they were trying to find a dress for their self.

No form of personalisation can just be implemented, with rules set and left to run. It's an ongoing process because customer behaviour changes, as do the touchpoints.

Also, these tools are there to handle the day-to-day activity and free up merchandisers' time so they can focus on trading. They can concentrate on merchandising the items that need it; that is, the ones that are selling really well or those that due to stock issues are getting lots of views but not many sales.

However, Callan acknowledges that while SLI Systems' solution continues to learn about each customer's behaviour and what they actually mean by a search term such as 'black jumper,' a balance has to be achieved between rigid rules and being flexible. Merchandisers need to fine-tune results by promoting and demoting products, creating custom landing pages or time limits, for example, although this can be overdone.

"You have to let the retailer decide as they know their business, but they don't have the statistical analysis that the system has," he comments. If retailers want to "fiddle" they generally aren't happy with the results so they should let the evidence speak for itself. If you A/B test the evidence-based version against a custom tune, the evidence-based version always wins, he explains. "That's true for any solution that's trying to learn."

Systems need a certain amount of rigidity while still being flexible, explains Henry. The end result is validating what you know about the customer at any given time.

NOW & THE FUTURE

Being able to analyse past performance to predict the future and automate it, bringing together the analytics, reviews, segments and margins, is where personalisation is today. In its Technology for Ecommerce 2015 Report, Econsultancy says: "As consumers increasingly expect their interactions with brands to be personalised and tailored to their specific needs, organisations are finally starting to grasp the importance of moving from generic to personal experiences." Separate research conducted by the firm reveals that there is also a strong commercial case for doing so,

“Shop Direct customers are served one of 1.2m possible homepages”


as companies who are personalising digital experiences report a 14% uplift in sales.

Of course, brands and retailers are always looking to squeeze that extra percentage point of conversion from their sites but as the growth rate of ecommerce has slowed, so the use of personalisation has increased. Retailers are turning to content personalisation as a key way of getting closer to the customer and enhancing their experience online. As SDI's Chen points out: "We enable them to optimise both the merchandising experience with our search, navigation and personalisation capabilities and the content experience with hyper-relevancy capabilities."

She believes the future is the single view. "What you see manifested on a website is an improvement," she says, but the industry is on the cusp of being able to marry the entire online world with the offline physical store experience in real time. "Predictive and real-time is the way it's going," Chen says.

The ideal is one-to-one communications across all channels utilising all of the data that's collected in a way that's applicable to each channel, interaction or touchpoint. There's still a long way to go before a shop assistant can immediately identify a high value customer when they walk into the shop, know what they were researching online before their visit and give them a truly personal experience. Likewise, while it's straight forward to share data from online to offline, it's harder to bring together multiple data sources from off- to online.

Callan adds another possible future, with retailers sharing information on customers' purchases so that complementary products can be merchandised to them, such as children toys from one retailer and being shown age-appropriate clothes when they visit another, or a Harley-Davidson t-shirt bought from one retailer and the shopper being shown relevant spare parts on a dealer's site.

With the right system and data and the successful use of insight, retailers can only get better at personalisation. However, customers have to be at the centre of everything and retailers need to think about what each one wants because soon personalisation will be the main differentiator as price and delivery give way to experience. Retail will move from seamless to connected and any retailer able to do this across all touchpoints is going to be way ahead of the game. 



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Matching the mix

Clever ways of monitoring and connecting with customers are all very well, but if the merchandise isn't what they're looking for or they don't understand the sales pitch, the effort may well be wasted. *Penelope Ody* investigates.

IN THE pre-digital world it was an experience all-too-familiar to every shopper: you knew just what you wanted to buy, but finding a shop which actually had the item available could involve hours visiting multiple high streets. Internet shopping and clever search engines have – in theory at least – made finding what you want rather easier, but they also bring new challenges for retailers.

The first is that perennial retail goal of selling more to your existing customers rather than having to constantly recruit new ones, especially when the competition is only that proverbial “one click away”. Then there are the inevitable stock-outs, which always occur from time-to-time, thirdly the lack of any feedback loop alerting buyers to such potential problems as excessive returns rates for a particular line, fourthly delays in adopting what is being called “high-definition merchandising” – to maximise digital technology and social media to better understand customers and develop appropriate ranges, the list could go on.

A recent study by IHL for OrderDynamics calculated that a combination of price cutting on over-stocks, lost sales through out-of-stocks and losses on returned merchandise could, worldwide, add up to \$1.75trillion: a “ghost economy” of potential trade lost to global retailers. It is an area, argues Kevin Sternecker, Chief Marketing Officer at OrderDynamics, where “big data” and powerful analytics can make a significant difference. “You don't need to find new customers,” he says, “you just have to fix the disconnects to see an 11% gain in year-on-year sales to your existing ones. Any retailer will be disappointing customers who are trying to buy what is not in stock.”

Thanks to “big data” – clever algorithms, predictive analytics and data integration across the enterprise – developing inventory problems that could drive sales into the “ghost economy” can quickly be highlighted. However, achieving a high level of merchandise availability is just the start: the assortment must also be closely aligned with


what the target customers actually want to buy. “Increased personalisation is the number one trend going forward,” adds Sternecker, “and that personalisation must be specific and granular to an individual level, not averaged to a segment.”

That is, of course, easier to deliver online where a real-time response to a known customer's individual buying and browsing habits is perfectly possible – just as long as what they want is actually included in the product assortment. “Online content has to be relevant and personalised,” says Gerald Heath, Ecommerce Practice Principal at Oracle implementer, OLR Retail. “New technology now makes it easier to do that based on which pages a customer has viewed and tracking them across websites. You can see what they have searched for on competitive websites, for example.”

While some customers may balk at the prospect of being constantly tracked, as Heath says, you have to be “very tech savvy” to block all the tracking options. Amazon's recently unveiled smartphone, for example, collects data from its users to make increasingly accurate product recommendations. “Tracking customer engagement to this level requires a customer relationship management system that is designed to capture customer data across every touchpoint, from a retailer's point-of-sale system to its Facebook page,” adds Sarah Davies, head of Kurt Salmon's digital practice in the UK.

PROVIDING THE INSIGHT

Few retailers will want to track the behaviour of every customer, but by using systems such as Google Analytics to understand the interests of, perhaps, both high spending shoppers and those who browse but rarely buy, can help to refine assortments to match their needs and wants more closely. “These systems allow you to find a great deal of information about your customers,” says Heath, “but it needs to be distilled down to identify what is really useful.”

Mark Stone, SVP and COO for the UK at TXT e-solutions agrees: “Big data and clever 

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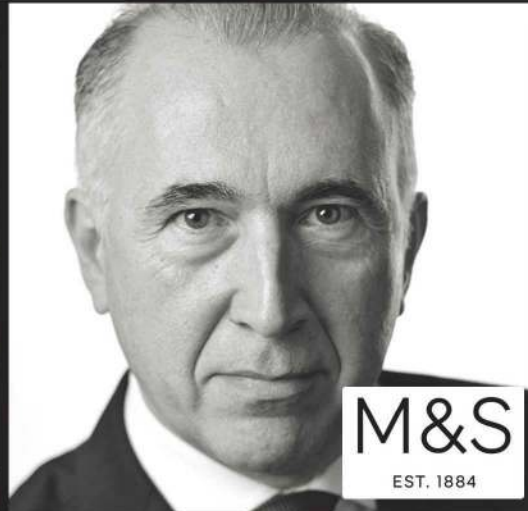
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analytics are very valuable,” he says, “but you also need good data analysts to provide the insights that can help the business”. He talks of “customer-driven assortment planning” with stores if not actually planning down to an individual shopper at least making greater efforts to match assortments to an individual store’s customer base. “For the very largest retailers, planning to store level is still challenging,” he says, “so they still operate clusters. Historic sales patterns are important but are not the only driver for the assortment. You need to look at such things as local demographics, geography and lost sales analysis. Online you can track what people are browsing but that is harder in-store, although we are finding retailers want to improve the way they record not just out-of-stock data but also the items customers ask for which they don’t stock.”

While gaining “customer insight” is a priority for many retailers, actually feeding that information back into merchandise departments is less common. “Customer data traditionally goes to the marketing department,” says James Lovell, Smarter Commerce Solutions Consultant Europe at IBM, “but it needs to be shared with merchandising as well. The focus today is on personalising the experience, not just in digital channels, but in the physical world as well.”

Lovell argues that smartphones are key with geolocation data providing information about where in the store a customer lingers and how long they spend looking at particular products. “The technology is still mostly used for push promotions rather than understanding customer behaviour,” he says, “but that is changing.”

Changing too, is the range of information sources buyers and merchandisers need to consider when planning the product mix. Social media is possibly high on the “to do” list but very few retailers have any formalised structure for using the customer insights it provides and focus instead on treating it as an additional channel for pushing product – which is not at all what customers actually want. According to a recent Oracle survey 42% of those questioned specifically stated that they did not want retailers to contact them via Facebook. “They don’t want to be sold to by social media and they don’t want to be asked too many privacy questions,” says Sarah Taylor, Senior Director at Oracle Retail, “but consumers still expect retailers to know what they like and what interests them, so

“Retailers are moving to a pull approach where customer demand and insight drive assortment decisions”

retailers have to use good data analysis to find the right answers.”


HD MERCHANDISING

“Buyers might look at sites like Pinterest,” says James Lovell, “but do they use it to glean insights into what is interesting their target customers? If the supply chain is good then it may be possible to respond to an emerging market trend very quickly.”

This is where “HD Merchandising”, now gaining ground in the US, comes in. The aim is to use the digital tools familiar in everyday life – Facebook, Pinterest, Yelp, Instagram, Twitter – in a business context replacing what Kurt Salmon describes as the “analogue tools equivalent to the Yellow Pages, old fashioned telephones and TV aerials” currently available to most buyers. Instead of product codes, systems should incorporate visual imagery, while information flows should be streamlined across the organisation so that buyers and merchandisers can have instant feedback on what is selling – and more importantly what is not selling and being returned. These customer reviews also need to be fed back to merchandisers in real time, not just sent to the marketers who may focus on damage limitation rather than product redesign.

“Buyers and planners need to incorporate social media insights into their processes,” says Mark O’Hanlon, Senior Manager at Kurt Salmon. “Crowdsourcing product feedback should be both internally among colleagues and externally among consumers, as well as reviewing blogs and product reviews to understand customers’ requirements, inform past-season performance reviews and future-season planning. This allows the consumer to drive how products are grouped and reviewed by buyers and helps retailers talk to consumers in their language.”

When it comes to connecting with customers, language is, of course, key. As Diane Ellis, CEO of The Limited said at NRF in New York earlier this year: “The language that we use when marketing our products comes from language that we hear in our reviews and social media. Many times, we tried to come up with great descriptors for a product but it didn’t necessarily resonate with the client. Being able to leverage her testimonials – use the actual customer language about the fit, style, fashion – really was important to her. We can then bring that into our language.”

Of course, once you have a common language, customer connection is so much easier. 

You pay your money and you take your choice

Giving customers choice through delivery leads to multiple options for delivery and collection. *Sean Fleming* looks at what it means for retailers and carriers to deliver this choice.



CHOICE, AS we are all well aware, is important. You probably learned this earlier in life than you realise, especially if you were ever given a Cadbury's Selection Box at Christmas when you were young.

If, like me, you were a child in the days before Glasnost and the fall of the Berlin Wall, you'll be aware that, just a few hundred miles to the east, there was a foil to the growth of consumerism and choice we were

experiencing. Unlike their neighbours in West Germany, who could choose between VW, BMW, NSU (the forerunner to Audi), and countless other non-German car makers, the citizens of East Germany chiefly drove Trabant or Wartburgs. That, comrade, was as much choice as it was decided you would need.

Buying a car in 2015 is one of those things that brings you up close and personal with the concept of too much choice. Do you want a saloon, an estate, a hatchback? Diesel, petrol,

or hybrid engine? How about climate control, or sat-nav? What size wheels? Do you want the comfort pack, the storage pack, xenon lights, run-flat tyres, heated seats... the list really does go on and on.

No one in their right minds would try to convince you that adopting the command economy approach to choice would be a good thing. Equally, you won't find many people disagreeing that there is such a thing as too much choice. If you offer an eye-watering array of choices, especially in ecommerce deliveries, you'd better be able to make good on the promise you make to your customers.

BY THE NUMBERS

Not so many years ago, when you bought something via mail order – and this persisted into the early days of ecommerce – the phrase '30 days, post and packing' told you everything you needed to know. It was just about as good as it got in terms of delivery.

You're unlikely to build a successful online business in the 21st Century based on terms like that. Choice is no longer just important, it's mandatory. However, how much choice, and what kind of choice, is harder to pin down.

Amazon currently offers eight separate delivery options for shipping within the UK: free super-saver, first class, one-day, two-day, express, evening, expedited, and scheduled. There's also a range of collection options including Collect+, Duddle, Pass My Parcel, and Royal Mail Local Collect.

The footwear chain Schuh is synonymous with great delivery options, in particular because of the way it uses its network of stores. It also offers Shutl – which is now owned by eBay – to offer super-fast same-day delivery. For Schuh shoppers this boils down to just four options for delivery (one of which is free) and three for collection.

That's not to say Amazon is doing it wrong, but it serves as one example of how great choice is as much about making things work as it is about providing a menu with lots of items on it.

LEARNING FROM OTHERS

Once you go through the process of deciding how many different delivery and collection options you will present shoppers with, you have to be certain you can actually execute on them.

By examining what happens during the annual peak period, you can begin to see how a chain operates under duress – how

it copes, how it prevails or fails. Taking those insights and applying them to your year-round operations will enable you to map out an infrastructure that can flexibly accommodate both high peaks and more choice; the ability to do both is rooted in many of the same capabilities.

Consider last year's Black Friday, which was preceded by a drop in sales, as shoppers geared themselves up for a frenzy of discount shopping. That translated to a drop in parcel volumes, which caught out many of the carriers, which then found themselves overwhelmed in the aftermath of cyber weekend.

Neil Ashworth, CEO of nationwide collection chain Collect+, sees this as a great learning opportunity. "That drop in volume was a sign and if we'd been able to read it properly we'd have seen there was something going on.

"Then, of course, volumes took off in an unprecedented manner. For example, Yodel had an extra 600,000 parcels over the course of cyber weekend. They'd have needed an extra 5,000 staff to clear that volume in the usual timeframe.

"Retailers' marketing teams will have decided what deals they were going to run. They will have talked to their supply chain colleagues, who will have increased stock depth of key items. There might have been conversations with the distribution teams but that information won't automatically have been passed on to the carriers. As a consequence you have to wonder if the right plans were put in place – I don't think they were."

Ashworth's view of cyber weekend 2014 can be regarded almost as a microcosm of what ought to happen all year round.

You want to offer customers the delivery – or collection – option they want. After all, it's a great way to engender loyalty and keep people coming back time and again. However, you can only make it work if each link in your supply chain is fully appraised of what's required, is sufficiently resourced in order to do it, and is never left hanging in the breeze in the event that something starts to go wrong.

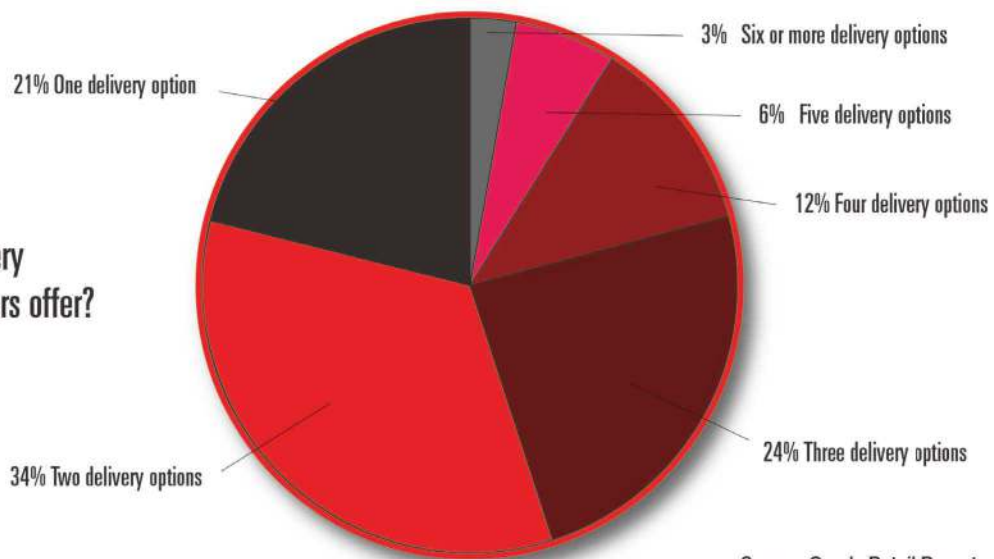
But it doesn't stop there.

KEEP LOOKING OVER YOUR SHOULDER

Consider if you will the clothing chain Reiss, which by and large ignored Black Friday last year. It still, according to some, saw a 30% uplift in sales. Why? Because customers were out there looking for deals. ►

Choice is no longer just important, it's mandatory

How many delivery options do retailers offer?



Source: Oracle Retail Report
2015 Delivering Retail

So it's no longer just your supply chain you've got to worry about, but everyone else's too. Because despite the almost infinite capacity for orders to be placed online, ultimately there is a very finite number of warehouses, boxes, people, vans and roads that all those orders then have to be funnelled down. Your ability to keep your promise to the customer could be compromised by someone else's flash sale. You have to have full visibility of your supply chain in order to know if you might be heading for trouble.

You're probably going to need some sort of big red 'stop' button, too. Better yet, an automatically triggered alert that allows your back end to tell your front end when it is starting to creak. Why would you continue to offer shoppers same-day or next-day delivery if your warehouse is empty, or your carrier doesn't have enough people to pick, pack and deliver things?

According to Becky Clarke, CEO of NetDespatch – a data company that manages end-to-end fulfilment processing operations for several well-known retailers and carriers – it's the retailers that are the key to getting delivery right.

"You strike a deal with your carrier based on certain criteria. Then you have a big promotion that goes really well. What about your carrier? They struggle and it becomes very expensive for them.

"The market is growing really quickly, and that can be a problem; we don't get a smooth build up anymore in the run-up to Christmas. The twin peaks of Black Friday and Christmas are painful.

There is a very finite number of warehouses, boxes, people, vans and roads that all those orders then have to be funnelled down

"It's all on the retailer. There's precious little the carrier can do. They only carry the parcels that the retailer is sending out."

ALL ABOUT VISIBILITY

There's no getting away from how exposed to marketing messages everyone is. Offers, promotions, you name it, account for a considerable amount of the emails in your inbox – also in your junk and trash folders. There won't be a time when everyone in retail can relax and stop selling, either. Some estimates for the number of parcels for online-bought goods sent out this year by retailers are upwards of one billion.

Attracting repeat business and engendering customer loyalty will mean providing shoppers with routes to their purchases that fit in with them – no one wants to wait in all day for a delivery. No one ever did, and with the growing number of retailers offering delivery from firms like DPD, with their one-hour slots and text alerts, the prospect of waiting in all day is likely to lead to abandoned baskets.

If you're not already trying to fit in with your customers' busy lives you're already playing catch up. You are going to have to provide not just a better choice when it comes to delivery and collection, but simply a better service. The first mile and the last mile of the whole ecommerce customer journey will need to become more closely integrated. The more integrated your systems are, the more visible your problems will be, and the sooner you can see them, the better equipped you will be to do something about them. 🇬🇧

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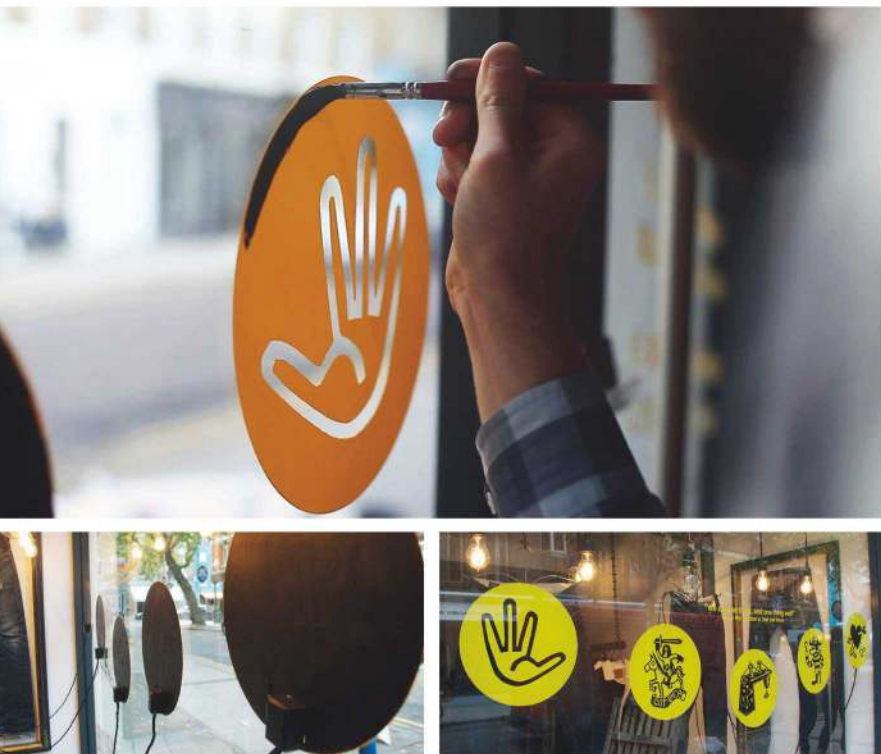
To find out why our clients' customers love to receive parcels from Hermes, visit:
www.hermesworld.com/en/sendsational

*IMRG Blackbay UK Consumer Home Delivery Survey 2015
**Delivered/attempted on time 98.2% vs. industry average of 92.4%.
Source: IMRG - MetaPack Delivery Index 2015


Makes delivery easy.

Meeting customer expectations

Sarah Davis, head of Kurt Salmon's digital practice, examines the key components to delivering a personalised customer experience and where 1:1 retailing is showing results in store.



half of UK retailers still have no formal process for innovating around the store experience, which makes it almost impossible to achieve consistent integration of technological advancement across channels. As such, there is still a long way to go to creating a shopping environment where there are no barriers between the shopping channels and customers receive a seamless, consistent and personalised experience, irrespective of how and when they shop. This is what Kurt Salmon calls 1:1 Retailing.

To be successful exponents of this within the store environment, retailers need to utilise the technology available to gather a detailed profile of each customer, their shopping behaviour and purchasing history, and then deliver appropriate personalised in-store service and marketing messages. They should couple this with an exciting in-store environment to create theatre and experience, with sales associates who have easy access to product information to provide the knowledge and service that consumers seek.

The benefits are certainly there to be had, given that conservatively around 50% of customers leave a store without engaging with a member of staff or a product; fewer than 20% are encouraged to purchase complementary items; and only a handful are even offered products based on their personal history and search or loyalty programme preferences. By providing a personal service, conversion rates can increase between 30-50% and traffic around 10-30%, generating between five and nine times more selling opportunities. By improving up-selling and cross-selling by 5-9%, Kurt Salmon estimates that retailers could sell an additional 15-25% of product.

DWELL TIME

When it comes to shopping in stores, it is all about the dwell time – and that means finding ways to keep the customer engaged. Kurt Salmon projects at Macy's and Nordstrom in the USA show that the time spent in store is directly related to basket size and has an exponential relationship with conversion rates – with the added bonus of improvements in customer loyalty, referrals, cross-selling and brand perception.

So, the more retailers know about their customers the better. Customer identity data, often driven from loyalty schemes, holds the potential to enable real differentiation in the in-store experience. With beacon technology and geo-fencing, stores can immediately recognise

DESPITE ALL the hype around mobile and online sales, stores remain pivotal to retail success, with 88% of UK retail sales going through stores. The challenge for retailers, therefore, is to make sure that the store – often their most costly asset – is meeting the demands of the modern customer who, courtesy of the online environment, now has a 24/7 service mentality and huge expectations. As such, retailers need to find ways to deliver an in-store shopping experience that while different, is just as personal as that achieved by many of the online specialists.

While the growth in digital innovation over the past decade has been exceptional, over

Interactive window display for Hiut Denim Co stockist Rivet and Hide created by Knit using Bare Conductive's Electric Paint.

when a customer steps over the threshold and can take steps to have a store associate engage with the customer, or marketed with relevant products. It might have taken more than 20 years, but at last RFID is being widely adopted so a store can easily recognise the product that a customer is touching, trying on and interacting with and make recommendations based on previous preferences. Although the use of customer tracking is by no means a new idea and has been a feature of online sales for some time, going forward it should be integrated into the physical estate and no longer used in isolation online.

Some retailers now use the manipulation of big data sets to really understand how a customer explores their store. For example, Tesco offers free wi-fi to its Clubcard holders, while in-store. This means not only can they follow movements but they can also use targeted marketing campaigns to forward promotions tailored to an individual customer. Although this is an extremely positive method of engagement, consumers do expect to be rewarded for their data contribution.

THROUGHOUT THE JOURNEY

One of the biggest obstacles facing personalisation will always be privacy concerns. Customer opt-in remains critical for the most individualised customised experience. Company apps can often be underutilised because the user has to commit to the download prior to purchase. Retailers, therefore, need to identify the best incentives for participation in interactive experiences.

Where progressive retailers are investing more time to connect with customers is in the “pre” and “post” sections of the customer journey. Pre-purchase push notifications can work alongside smart email campaigns to encourage the “on the fence” consumer and increase conversion rates. Capturing customer feedback via a robust post-purchase follow-up process is critical. When these techniques are used together it gives retailers real power to grow sales across all channels.

Curry’s is a good example of a retailer that has covered off the post-purchase phase, focusing on support and helping customers make the best use of their purchase. The electrical retailer will install a product, test it, remove the packaging and take away the old product free of charge.

Within the purchase phase of the journey, it is all about showing product clearly, demonstrating value for money and


educating: so this is the area where sales associates need to have knowledge of the customer and the product at their fingertips as part of the service offer. It’s also important to give customers and staff access to tablets and/or kiosks that provide information about product availability and delivery details. The Geniuses in Apple stores, who give great product demonstrations and tutorials, or Lush, awarded for its customer service and strong product knowledge, are among the best retail examples of strong management of the in-store purchase experience.

Tom Cole, former Vice-Chairman and CAO of Macy’s, is quoted as saying that “people do not go shopping only to acquire necessities; they go shopping to spend time with friends and family and to meet people; this is an element that no e-Shop will ever provide.”

Among those companies using cutting-edge ideas to drive brand awareness and improvements in business performance is Hiut Denim Co. The jeans manufacturer has window installations at its stockist, Rivet and Hide, which uses motion sensors to detect passers-by and play audio messages encouraging them to stop, look and find out about their brand. When icons painted onto the inside of the window in conductive ink are touched, they trigger the next audio message.

While video screens are hardly revolutionary, their innovative use within Burberry’s flagship store is exceptionally creative. Thanks to RFID chips in selected items of clothing, mirrors are transformed into displays showing exclusive video material about the item. At Uniqlo, digital mirrors in fitting rooms mean customers can change the colour of the items they are trying on at the touch of a button. These widely contrasting solutions share a surprising and playful approach to technology, captivating the customer and offering added value.

Despite suggestions by some commentators that the growth in online will see stores becoming mini depots, service points or showrooms, the value proposition for stores is actually in the social dimension, the convenience and the in-store experience. As the consumer shopping journey will increasingly touch a number of channels, the overriding necessity is to deliver consistency.

To achieve this, retailers must undergo extensive change that encompasses new processes, management systems, technology and infrastructure, while keeping the needs of the modern day consumer at its heart – but the prize is higher sales and profit. 

“By providing a personal service, conversion rates can increase between 30-50%”

Let's stick together

Adam Goran, Divisional Director of Customer Engagement, Grass Roots Group, takes a look at employee and customer engagement and how omnichannel brands can stay connected with customers.

IN THE current competitive retail landscape, retailers are looking increasingly to enhance their presence within the market. With the ever-increasing influence of technology in our daily lives, many are looking to develop their omnichannel strategy, with a particular focus upon their online presence. However, there needs to be an equal focus placed on ensuring brand values are consistently reflected throughout online and physical stores, which is where many are missing a vital element to the bigger picture that is omnichannel.

Traditionally, retailers have used advertising, email marketing and in-store promotions to drive sales and encourage customer loyalty; however the most readily available, yet least utilised tool that should be high on retailers' agenda are the employees themselves.

In the past, employees have simply been seen as just another part of the retail mechanism, but their potential to dramatically boost sales and breathe life into an omnichannel campaign in-store, is a vital resource that many retailers have yet to use to their advantage. Employees are the main interface for a brand to interact with customers and the key tool to ensure core values are consistent across all channels of communications, both on- and offline. There are so many touchpoints in the customer

journey that retailers simultaneously do and don't have control of, whether its face-to-face in-store, on the phone and beyond into social media, the best place to start is at the heart of an organisation – the employee.

Employee engagement is about collective and shared behaviours that represent the brand and in doing so, deliver commercial objectives for a business. It is these behaviours that provide employees with the tools and the motivation to truly understand the business they work for and the investment that business makes towards their career development and wellbeing. If brands activate these employees, they are even more valuable through their ability to grow awareness and find new customers in an authentic and personal way. Critical to the bottom line however, is a workforce who is completely in tune with the customer brand values and offerings; whether that's in-store or online.

BRAND ADVOCATES

Engaging employees has never been so imperative; customers have become increasingly savvy shoppers who no longer like a hard sell, causing retailers to focus on moving from customer acquisition to retention, placing employees at the forefront of recruiting loyal brand advocates.

Brand advocates are vocal, passionate, and engaged customers who, as well as recommending brands to their friends in person, also inhabit various blogs and social media sites, from Twitter to Facebook and TripAdvisor. They will happily share their thoughts and experiences of a brand with their community, significantly helping to shape and influence actions and attitudes towards the brand, and open up valuable customer feedback channels.

Once time and effort has been invested in employees, brands can look to reflect advocates' favourability of social media and the internet



and incorporate an omnichannel strategy – interacting with customers through mobile, online and in-store. However, omnichannel is far more than just using different channels to engage customers. It is about ensuring that wherever a customer touches a brand their experience is seamless, consistent, and on the customer's own terms. For example, brands cannot afford for customers to only have a great experience when they visit their website or mobile app, only for it to be fundamentally different when they then they visit a store, or make a call to customer services. To avoid this, brands must ensure they focus equally on engaging their employees (and channel partners) to ensure the philosophy, culture and tonality is passed through them and embedded in every single customer touchpoint – which is wherever the employee and omnichannel strategies become intertwined.

Those that successfully implement an omnichannel strategy – for example, British Airways and Apple – understand their customers and how best to engage with them through each channel, ensure a seamless experience and provide different layers of interaction to enrich and enhance each customer's experience. They will utilise transactional and emotional data from all these touchpoints to garner a single, holistic view of the customer – insight that can be used to further improve future engagement. Their customers recognise the value of enhanced engagement, therefore build trust and become loyal. Bottom line, a brand gains a loyal following of long-term customers by adding value through omnichannel engagement.

BRAND ACTIVATION

Although those looking to create omnichannel advocates should start with employees, it is vital that each and every brand lives and breathes both customer and employee engagement. Brand activation – the alignment of all parts of the employee value proposition to the brand values – requires a relentless desire to measure and challenge. It's only by understanding and improving the employee values before it becomes customer-facing, can brands see a real boost in customer satisfaction whilst, at the same time, giving their employees a real sense of pride and ownership.


When the employees are on board the customers will naturally follow. The value of any brand advocate, employee or consumer, should not be underestimated. It is a widely

“When the employees are on board the customers will naturally follow”

accepted philosophy that word of mouth recommendations are one of the most effective forms of advertising, with 92% of consumers (according to Nielsen research), trusting a brand advocate's opinions. If we then consider that the internet has facilitated the self-educating buyer, it is fair to say that today's customer wants access to useful content that will shape their buying decisions before they've even left home. Advocates are often the savvy shoppers' first point of contact, reading their posts and watching their videos before making a purchase decision.

Our recent research revealed some interesting findings into consumer perspectives of the retail banking industry. A distinct correlation was found between banks that scored well on employing and training the most knowledgeable staff and those that also received favourable scoring on the occurrence of the main three frustrations of charging for going slightly overdrawn, poor staff attitude and errors on customers' accounts. Our research also found that good service reputation is a factor influencing the choice of the customer of 2015, with 85 per cent who received a very good service stating their current bank is their first choice for new products. This goes to show that employee knowledge and engagement has a direct link to an organisation's continued success and growth.

Santander is a prime example of an organisation with a successful employee engagement strategy which can be directly linked to an improvement in customer experience. Prior to the launch of the 1,2,3 Current Account, Santander launched the scheme internally to their employees three years in advance, aligning the recognition and performance programmes with the core propositional values - simple, personal and fair. By doing so, Santander's employees were able to bring the product to life, which ultimately made it the success it is today.

By implementing a strategy that supports the development needs of employees in an omnichannel environment, brand advocacy programmes have far reaching benefits. These include, but are not limited to, an increase in sales, an increase in customer loyalty amongst a broader section of customers, a happier workforce and a greater share of voice. The brands that fail to do this, those that deliver a disjointed customer experience, will risk losing customers to their competitors that instil greater confidence in their brand through omnichannel engagement. 

Planning for this year's Christmas shopping season

While the end of year seems far away, smart online retailers are already getting their eCommerce strategy in place. Here are some consumer shopping trends from the annual SDL holiday shopper survey to bear in mind:



The USA, UK and Germany lead the way in shopping exclusively online for gifts



31%



31%



30%



Talk to shoppers in their language

71%

of global internet users don't speak English

9 out of 10

shoppers always opt for a native language website

SDL powers over 350 global retail brands, driving more than \$16bn in annual online retail sales.

Want to learn how you can optimize your eCommerce experience and drive both online sales and customer loyalty?

Contact engage@sdl.com or visit sdl.com/ecommerce for more info and handy stats from the holiday survey.



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It's the end of the world as we know it

(but you'll be fine)



Mobilegeddon, browsergeddon, cookiegeddon – you'd think that, from a mobile perspective at least, the world as we know it is about to implode. Moves by Google and Apple to make things more mobile and to block cookies respectively won't necessarily bring about the fall of ecommerce. *Paul Skeldon investigates.*

THE NEED to go mobile is imperative for retailers: this can't be overstated enough. Your customers live in a mobile world and retailers need to get that. In fact, a third of all online sales in the UK will take place via smartphones and tablets this year, according to eMarketer, and by 2019 it will be closer to 40%.

Miss it and you miss out: UK retailers are collectively missing out on an astounding £6.6bn per year due to a lack of investment in their mobile offering already, suggests a report into mobile spending from the Centre for Retail Research (CRR). Consumers are on mobile – searching, researching, sharing and buying. Retailers, it seems, aren't.

“Digital shopping and buying long ago entered the mainstream for most UK consumers, and buying via mobile is just the next step. Indeed, device-agnostic buying, thanks to users' familiarity with these various device types, is becoming the norm,” commented Bill Fisher, analyst at eMarketer. Retailers have to be on top of this whole new way that consumers shop.

MOBILEGEDDON

However, it is not just this shift in consumer shopping habits that is going to drive this. Google, which increasingly is looking to mobile as the predominant consumer channel, certainly for search, changed its algorithm to make mobile-friendly sites stand out – or rather to downgrade the mobile search rankings of those that aren't 'mobile friendly' – with effect of 21 April to 'help' drive all merchants to become more mobile orientated.

The move by Google – dubbed by many as Mobilegeddon – was long mooted and has been driven by Google's desire to make its product as context-relevant as possible. In a blog post back in April, just prior to the release of the new algo, the company said: “We've all been there: you're on your phone and click through to a website, only to find it's hard to read or burdensome to navigate because it isn't formatted for a mobile screen. With mobile phones increasingly becoming

the primary way for people to search the internet, we want to ensure that when you search on Google you find content that is not just relevant and timely, but also easy to read and interact with on smaller mobile screens.”

The worry ahead of the update was that many sites would drop off Google altogether, and that many would be relegated to the dreaded ‘page 2’ of search listings on mobile. There would, many argued, become a two-tier marketplace for retailers: those that could afford the costly upgrade to become mobile friendly and those that didn’t. The egalitarian nature of the web was doomed; the level playing field now a very steep incline.

Three months on, did retailers crash and burn as many had predicted?

In a word: no. It seems that many merchants and website owners already had mobile friendly plans in place or upgraded what they did before the algo changed. Enterprise SEO tracking company BrightEdge tracked 20,000 top ranking sites across the change period and found that only 17.3% of those dropped from the number one spot.

Research by search and content optimisation leader, Searchmetrics, also now reveals that leading supermarket sites that perform well in desktop searches also still perform well in mobile phone searches in the wake of the algo change.

Tesco came out on top, by some margin in the study, being some three times more visible in mobile search than its nearest rival Asda. Others, such as Lidl and Iceland – and even Sainsbury’s – fared less well, but were by no means hammered by the change.

“When Google announced its mobile-friendly update, there was speculation about the major impact it could potentially have on brands. However, our analysis indicates that the effect has not been significant on the leading supermarket retail sites we included in the research. Probably because they made sure their sites were already well optimised for mobile phones,” explained Marcus Tober, CTO and founder of Searchmetrics. “It’s likely that some smaller sites who have not invested in the mobile user experience of their pages will have seen a drop in search performance and traffic from mobile phones.”

The changes to how the algo works clearly aren’t nearly as severe as many predicted, however, it is more likely that this is just the first step towards really upping the ante when it comes to ‘encouraging’ website owners to become mobile-friendly.

MOBILISING THE IRUK 500

When the IRUK 500 Mobile report was released in March 2015, 80% of the Top500 used the Viewport Meta tag on their sites. As of late June, 89% now use the standard, which tells a mobile browser how to render a page on a smaller screen. No doubt the 9% improvement – equivalent to 45 ecommerce websites – is largely the result of mobilegeddon’s punitive incentives.

There’s a clear difference in performance of the mobile web compared to desktop web, with mobile versions of Top500 websites taking seven seconds longer, on average, to load than the desktop versions, according to recent research in the IRUK’s Customer Experience report. There’s a crucial element of how pages load which isn’t captured by these figures, though. Pages should be interactive or at least readable before they’ve fully loaded.

COOKIEGEDDON


There is now another threat lurking in the wings: cookie blocking. While Google is doing its level best to up website owner’s game when it comes to mobile, Apple is doing its bit to ‘protect’ consumers by going all out to block cookies, pop-ups and other marketing techniques in the next iteration of its Safari browser.

Where many were worried that their sites may not appear high up in Google searches on mobile if they weren’t mobile optimised, Apple’s move towards, what is inevitably being called “Browsergeddon” – and “cookiegeddon” and “Cookie Armageddon” – is worrying as it will effectively block a vital mobile marketing channel for many retailers and merchants.

‘Browsergeddon’ may well force many companies to rethink how they market through mobile (and online for that matter), but just as with Google’s drive to make merchants more mobile-friendly, this may not necessarily be a bad thing. Cookies are an effective way to track people, but they are pretty old hat. Pop-ups are just annoying. On mobile, both these things are extremely detrimental to UX, so perhaps it’s time that marketing was rethought.

After all, there are many other ways to tap into mobile users with their location and push messages and even, dare I say it, text.

This, and a move to make all sites mobile friendly, can only make it more likely that consumers will use their mobiles to shop and buy, not less and that is what we all want. The end of the world as we know it doesn’t have to necessarily be a bad thing.

There are some simple things you can do to make your site mobile-friendly in Google’s eyes. Paul Skeldon runs through ten top tips online at <http://etail.li/53mobile>. 

“Cookiegeddon will block a vital mobile marketing channel for many retailers and merchants”

Capturing the moment

Kevin Davis, Senior Professional Services Director, Syniverse, explores how retailers are connecting with customers to capitalise on mobile moments along the new retail path to purchase.



THE 'PATH to purchase' concept has long been a foundation of retail strategy. Now, however, a new era of the constantly connected, mobile-empowered customer is redefining this path. Mobile devices, text messages, apps, social media and multiple other channels offer more ways than ever for retailers to interact with customers. As a result, retailers have gained both an unprecedented opportunity to reach their customers with personalised messages in the 'mobile moment,' and an opportunity to realise the rewards of increased business, brand loyalty, and customer satisfaction.

Mobile moments are the specific points along the path to purchase when customers turn to their mobile devices. These moments, often driven by impulse, are the times when the customers use mobile to connect with a brand, research information or make a purchase. With mobile increasingly being integrated as a part of our lifestyles and with many people

considering their mobile devices so valuable that they keep them within reach at all times, it's critical for retailers to identify these mobile moments and strategically act on them.

In the past, the typical customer path to purchase was linear and employed a sequence that included ideation, research, purchase and enjoyment. The power of mobile though has changed this dramatically. The new path to purchase is an integrated and interactive experience that evolves as the customer interacts with the retailer in the store, on mobile, online and on social media. Not only is the new path to purchase no longer linear, but it's evolved to one where the customer journey has become mobile-centric.

Soaring rates of mobile adoption and the new expectations of a mobile-first customer base are the reasons for this new path. Mobile use is currently at an all-time high and continues to accelerate, increasingly being used for research, price comparisons and making purchases. Not only do mobile ads boost physical store visits by eighty per cent in first day of viewing, research conducted by RetailMeNot earlier this year predicts that mobile devices will account for 28.6% of all online purchases in the UK in 2015.

Taking this growth into account, a seamless omnichannel path to purchase strategy is now imperative for retailers to capitalise on these mobile moments. This means that retailers must interact with their customers in richer and more intuitive ways that are more personal, more contextual and in real or near real-time. One example of this is being able to determine the location of a shopper and sending geo-location offers. These are personalised offers that are sent when a customer gets within a certain distance of a location, usually a brick-and-mortar store. These types of offers have high redemption rates since they are presented at the time of decision making.

CAPITALISING ON MOBILE MOMENTS

As mobile adoption continues to increase, retailers have rushed to embrace new ways to

connect with their customers, most notably through apps. With good reason. A recent report by Cisco found that more than fifty per cent of shoppers said they will use a retailer's app for, or during, shopping, and 34% claimed to use a third-party app.

Yet app adoption has slowed in the past few years, indicating that apps aren't enough to optimise engagement with customers. Based on this trend, retailers must look to additional ways of capitalising on mobile moments.

Text messaging offers one such way and is proving itself to be a critical element of an integrated mobile engagement strategy. With ninety per cent of text messages being read within three minutes, according to Mobile Squared, messaging can be used as a direct channel to drive customers to rich content like apps, videos or mobile-optimised websites.

Another engagement channel that has been widely embraced by retail marketers is social media. In the past, many companies placed social media at the end of their path to purchase strategies by enticing customers to share "look what I just bought" messages. The recent introduction of mobile-only "Buy it" buttons have altered the path to purchase by shifting social media closer to the start of the customer's journey.

Buy buttons, which have recently been announced by Google, Twitter, Instagram, Facebook and Pinterest, enable customers to purchase products instantly while they browse on their favourite platforms. Consequently, they are effectively turning each platform into its own mobile marketplace.

Where though do buy buttons fit within a retailer's wider mobile strategy? The truth is that they are just another channel that needs to be considered for increased customer engagement, just as apps, emails and text messages are. The value of buy buttons lies in the fact that social media platforms have a built-in audience and can drive lots of traffic, significantly widening the net in which to capture customers in the mobile moment.

Moreover, creating an integrated, cross-channel mobile engagement strategy does more than provide retailers the opportunity to capture customers in the mobile moment. By understanding the mobile-centric nature of the new path to purchase, retailers can reap multiple business benefits, including better customer acquisition, improved customer service, and enhanced engagement, through loyalty programs.

Yet merely adding mobile channels to

a marketing mix won't work. Without taking into account the holistic consumer experience and the potential collateral damage of uncoordinated campaigns, it is unlikely a retailer can succeed in this new mobile market.


360-DEGREE CUSTOMER VIEW

Mobile has opened a world of opportunities for capturing consumers in the mobile moment. Devices that are opted in and connected to networks and in-store beacons, for example, leave time-stamped and geographic signatures, and the use of apps and social channels produces a record of browsing, sharing and purchasing activity. These data points, referred to as "mobile context," enable us to better understand the intentions, actions and movements of customers and allow retailers to successfully shape their marketing efforts to reflect what customers want.

When mobile context is leveraged with other customer insights, including web and transactional data, retailers are able to get a full 360-degree or "single view" of the customer. This in turn allows retailers to create metrics for areas such as customer sentiment and brand strength.

Gaining a 360-degree customer view offers the holy grail for many retailers – an unprecedented way for them to truly understand each individual customer's path to purchase. Analysing the path to purchase, when done correctly, can shape merchandising, customer support, public relations and marketing efforts all while enabling a more personalised experience for each individual customer. For example, retailers can determine their brand enthusiasts, top shoppers, and most popular products based on knowing their customers.

As a growing number of customers turn to their mobile devices for support with their shopping experience, retailers must respond. They must focus their strategies on mobile in order to capture and capitalise on these mobile moments at every stage of the new path to purchase.

Moreover, retailers need to treat each and every customer journey individually. They must provide rich, engaging experiences enabled by mobile context that reach the right customer, with the right message, at the right time. The retailers that get it right will be those that win customers' loyalty from today's new mobile-first, connected customer. 

Gaining a 360-degree customer view offers the holy grail for many retailers 

Insight around the world



JENNIFER RAEZER,
DIRECTOR, MARKETING & COMMUNICATIONS, BORDERFREE

Singapore is the market that comes out on top for cross-border ecommerce, according to a study by Borderfree. It has a thriving economy, households with high disposable income and is a nation where shoppers are familiar with global brands. All of these factors are vital to an international take-off and for a market to embrace the retailer's brand. Buying online from foreign retailers is ingrained in Singapore's shopping culture, with more than 50% of their online shopping being cross-border. Borderfree ranks Singapore as the fifth largest market by sales volume, with shoppers spending an average of £142 per order with retailers on the Borderfree platform in 2014.

Along with English being one of Singapore's four main languages, a bricks-and-mortar presence within the city-state from top fashion retailers like Jimmy Choo, Coast and Karen Millen has helped to bolster brand familiarity with UK retailers.

Singapore's retail ecommerce spending stands at £2.8bn, with half of all traffic coming from mobile devices. Much to the appreciation of savvy Singaporean consumers looking for more bang for their buck, most goods are imported duty-free with only those items with a value of more than 400 Singapore dollars (£193) subject to the 7% Goods & Services Tax.

Key to successfully targeting the Singapore market is understanding its demographics and shoppers' unique preferences. Data in Borderfree's report paints a picture of the average online Singaporean shopper and how they like to shop: 87% of the population use the internet and smartphone use is among the highest in Asia at 82%; Three hours and three minutes is the average time per day a Singaporean spends using the internet with peak shopping hours between 10pm and 12am local time; Expenses for personal appearance-related purchases top out at £2,255 per year; The 20-64 year old population has 2.7 credit cards per adult with 80% preferring credit as a payment method.

As UK retailers look to take advantage of the global ecommerce market, Singapore is without a doubt a key target market which is set up to support our brands.



ELSPETH CHEUNG,
GLOBAL BRANDZ VALUATION DIRECTOR, MILLWARD BROWN

In the tenth annual BrandZ Top 100 Most Valuable Global Brands ranking by WPP and Millward Brown, the most valuable retail brands lack physical stores. Chinese e-tailer Alibaba shot into the top spot of the retail ranking after its IPO, overtaking Amazon and adding its \$66.4bn brand value to the sector. Retail is now one of the fastest growth categories alongside technology.

Amazon, the no.2 retail brand, saw a -3% decline in its brand value to \$62.3bn but remains more valuable than Walmart, which it overtook in 2013. Walmart, no.3 in the retail ranking, is worth \$35.2bn and has 11,000 stores worldwide.

Discount retailers, with their value and quality offers have shown strong growth in recent years. Aldi (no.8), grew its brand by 22% to \$11.7bn and Lidl (no.20), was up 27% to \$6bn. Advertising focusing on promoting quality produce equal to the major multiples has helped the discounters' value proposition and resulted in a shift in the balance of power. The major supermarkets no longer dominate the retail ranking.

The top ten most valuable retail brands globally in 2015 are: Alibaba; Amazon; Walmart; The Home Depot; Ikea; eBay; Woolworths; Aldi; Costco; Lowe's.

In addition to no.1 brand Alibaba, another Chinese ecommerce site ranks within the top retail listings. JD.com processed 689 million orders in 2014 to enter the ranking at no. 16. The ability of Chinese brands to build brands overseas as well as at home is a common theme across many categories in this year's ranking. According to The Economist Intelligence Unit, China is expected to overtake the US as the world's largest overall retail market within five years.

As retailers continue to fight off fierce price competition and operate in a category undergoing radical transformation, there's an underlying urgency to remain relevant to shoppers. Adopting a shopper-first attitude is not enough; retailers also need to create meaningful and differentiated brands if they want to find a path to growth.



**FRANK VAN DEN BERG,
MANAGING DIRECTOR, SALESUPPLY UK**

In terms of demographics the Brazilian market is attractive, it is large, has a growing middle class and has long had a promise of further future growth. With more than 100 million people classified as c-class or above Brazil is the 8th largest market in the world when measured in GDP. The rule of thumb when investing in Brazil are: three-year horizon; US\$3m budget; three times product cost.

It takes an average company three years to get in the black. The set-up takes time and is expensive. Examples of what is required prior to opening for business are good tax advice, administrative support, a good lawyer and partners to manage logistical processes such as importing.

A US\$3m spend is a realistic (minimum) figure over 3 years and is based upon a) the minimum cost of entering the Brazilian market, b) running an organisation with a minimal staff and c) a reasonable marketing budget. Depending on how fast you get traction in the market, you will be able to estimate how deep your pockets need to be.

The sales price (price point) of your product sale is key. Stability of the sales price depends on competition, including other market entries. Due to cost (import, transport...) the cost price of your product is likely to double or triple.

The World Bank Group agrees that Brazil is not an easy country for market entrants. According to its survey of 189 countries, Brazil ranks:

- 120th in terms of overall ease of doing business;
- 167th in terms of starting up a business;
- 177th in terms of paying taxes;
- 35th in terms of protecting minority investors;
- 123rd in terms of trading across borders;
- 118th in terms of enforcing contracts.

Brazil is notorious for bureaucracy, cost of doing business and dependency on 'relationships' when trying to do business. This does not mean it can't be done, but it means that seizing opportunities is not for the fainthearted. Foreign companies can succeed and when they do the prize is sizeable.



**ARNE ANDERSSON,
E-COMMERCE EXPERT, POSTNORD**

During the first quarter of the year, consumers in the Nordic region spent approximately SEK 36.5bn (£2.85bn) online. This corresponds to an increase of around SEK 2.5bn (£190m) – and a rise of 7% – compared with the same period last year, according to PostNord's report E-Commerce in the Nordic Region.

Across the region, people are increasingly shopping online. The Danes surpassed the Norwegians as the population that shops online the most (76% and 75%, respectively), but the percentage also increased slightly in Sweden and Norway.

However, while the development of ecommerce continues to move forward it is crucial that deliveries meet consumers' demands. Almost half of all people in the Nordic region consider it very important to be able to choose the delivery method of their purchases. Recipient power is valued highest in Denmark, where over one third of online shoppers consider it very important to be able to choose how an item will be delivered.

In Denmark and Sweden, about one third of online shoppers expect their purchase to be delivered within three days. In Norway, 25% expect the same delivery time, and in Finland, 33% of shoppers are open to waiting up to five days.

The most popular option for all shoppers is to collect their purchase from their partner outlet. In Sweden, Norway and Finland, about half of all consumers want to pick up the item themselves. But in Denmark, where home deliveries are more common, only one fifth want to go to a service point themselves. Generally speaking, interest in home deliveries in the evening is low in all countries.

The UK, US, Germany and China still top the list of countries from which people in the Nordic region shop from abroad with clothes and shoes being the most popular items purchased. Sweden is still the leading country for shopping from abroad. However, Swedes do not shop very much from their neighbouring countries.

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October sees the tenth, annual InternetRetailing Conference and the launch of the eDelivery Conference. Emma Herrod shares a preview of who'll be there and how you can join in the debates.

ON 14 OCTOBER, the 10th Annual InternetRetailing Conference is taking place in London with a 'decadian' theme driving the event as it looks at the fundamentals of multichannel retail. In this fast-changing industry every twitch, innovation and new opportunity is hailed as a trend, but with the benefit of a decadian view we can look above and beyond these to assess the longer term directions and currents.

For 2015, we are going to look at the fundamentals within multichannel – the customer, the product and the order; these three elements define multichannel ecommerce and are the focus of three simultaneously-running tracks at the InternetRetailing Conference. These will all be considered through a decadian lens: what has stood the test of time or not? How do we balance harvesting returns in the short term with building value in the long term? Put simply, how do we move from the 'transaction' to the 'customer' and then to sustained value?

CONFERENCE THEME: 'DIRECTIONS'

Hindsight is only useful insofar as it can be turned to future advantage, to set a clearer, more confident direction for the integrated, demanding, international landscape in multichannel retail.

The first decade of ecommerce was the time of learning, of experimenting, of being able to fail and still have the sympathy of the early adopters. The last decade has been that of the 'working web' and the journey into multichannel. The coming decade is a time of full integration, of digital leadership transforming the organisation – but a time of customer expectation and intolerance for anything less than excellence. As we look forward, however, the notion of a 'decade' might lull us into just awaiting a rosy future. As retailers we know that action is needed on a daily basis and so as we consider the future we're adopting a '520-week' view that helps

us balance the urgency of "now" with the importance of the "next".

By analysing the past we will focus upon creating the future. This will be the focus of the keynote presentations by Patrick Bousquet-Chavanne, Member of the Board & Executive Director – Marketing & International, Marks and Spencer and Peter Williams, Chairman, boohoo.com.

Following the keynote sessions, the Conference will split into three parallel streams focusing on The Customer; Product and Services and The Order.

Stream 1 – The Customer: Without customers we have no business. How can we gain their interest, take their money and repeat profitably? How has the approach to the customer changed and what new thinking will inform our view of and connection with customers for the coming decade?

Stream 2 – Product and services: The products we offer define us to our customers – their relevance to their needs and desires, and the experience of ownership. How best should we present our products to connect with the customer? How can we source better and expand our ranges while only managing costs? This stream will examine how the best procure, manage, present, sell and exploit their products – for brand, profit and growth.

Stream 3 – The Order: The 'unit of commerce' in multichannel is the order. More so than the sale, it is the creation of an order that drives our operations to pick, pack, ship and deliver – whether to home, store or collection point. Customers want more control and information about this unit of commerce and exposing data and control to a customer is a new service frontier. Optimising the routing, the decision intelligence and the service levels is an enterprise-wide challenge, but one that's tightly bound with profitability and customer-facing capability. In this stream we'll learn from the silo-busting business-wide approaches to managing the order

Key dates for 2015 learning opportunities



24 SEPTEMBER 2015

The Jumpstart Revolver is full of fast paced, best practice presentations straight from the IRTV studio. We have a new venue, which will be live-streaming the event, so pop in and hear from our experts or tune in from your desk. See more at internetretailing.net/jumpstart



24 SEPTEMBER 2015

InternetRetailing's Awards represent the pinnacle of recognition for multichannel and pureplay retailers. With 3 new Awards in 2015, the winners are nominated by retailers, evaluated with InternetRetailing's research and assessed by an eminent Judging panel. See more at internetretailingawards.net



13 OCTOBER 2015

New for 2015, the eDelivery Conference will celebrate the collaboration, imagination and rigour of supply chain professionals and explore how today, tomorrow and in the coming years they can truly fulfil the multichannel promise.

Register at edeliveryconference.com



14 OCTOBER 2015

The 10th Annual InternetRetailing Conference is driven by a decadian theme as it looks above and beyond every twitch, innovation and new opportunity hailed as a trend to assess the longer term directions and currents of online and multichannel retailing.

Register at internetretailingconference.com

– from store, warehouse, web and mobile, along with a view on the commercial pressures leading to further change.

At IRC2015, we will draw heavily upon the experience of decadian speakers – those peers who were senior achievers in our industry a decade ago and who still inspire and

deliver today. Retailers confirmed to present include: Jack Smith, Group Digital Director, New Look; Paul Coby, CIO, John Lewis; and Aaron Chatterley, Founder, Feelunique.

INAUGURAL EDELIVERY CONFERENCE

The inaugural eDelivery Conference will take place on 13 October – the day prior to the InternetRetailing Conference. Again, focusing on the board-level discussion, the eDelivery Conference will celebrate the collaboration, imagination and rigour of supply chain professionals and explore how today, tomorrow and in the coming years they can truly fulfil the multichannel promise.

As ecommerce growth within retail has been enabled by click and collect and cross-channel capabilities, so the focus with multichannel retail has turned to the logistics, operations and supply chain professionals 'behind the buy button'. Increasingly seen as a service to the customer-facing commercial teams, our focus in our inaugural eDelivery Conference is to consider how the increasingly-demanding promises are made and delivered.

eDelivery Conference is the 'rosetta stone' between the hard-iron realities of large-scale operations and the irresistible force of the connected customer. The Conference will follow the Board-level agenda between expert, senior operations and supply chain leaders with their commercial peers on the Board.

However, eDelivery is a peer-led Conference and so we will not only look at the 'solutions' offered to the business, but the approaches, challenges and learnings that underpin the successes.

The conference will be keynoted by Shop Direct who will present not just on their experience and achievements but give a three-way view, illuminating how through working across silos they affect change and delivery for the demanding multichannel customer. Three senior leaders - Gareth

Jones, Deputy CEO; Dan Rubel, Group Strategy & Communications Director; and Jonathan Wall, Director – eCommerce, will share the retailer's journey from a giant in the mail order business to a pioneering digital retailer at scale.

The conference then splits into the three, intense parallel streams of Growth, Fashion and Apparel and The Non-stop Sales Cycle to investigate, analyse and debate the learnings, innovations and trends supporting the theme of 'Beyond the Buy Button'.

See the agendas as they develop and sign up at www.internetretailingconference.com and www.edeliveryconference.com.

WHAT MAKES AN IR CONFERENCE A SUCCESS:

Across the two conferences, the presentations are:

- **Practitioner-led:** we hear from those professionals who have led and delivered significant projects for globally-renowned retailers, brands and services;
- **Case-study based:** our speakers will focus upon what they've done, what they're doing, and assess the results;
- **Research-led:** the agenda, case studies, comparators and evaluations will be referenced to the researched performance and capabilities of the Top500.

As usual, the approach at IRC is to reflect the board-level conversation in multichannel retail, and work across silos and role-types to understand how we connect commercially with the connected customer. Our appreciation of 'RetailCraft' – the way business is conducted pragmatically, at scale, at profit – underpins the selection of speakers and topics. Our unashamed focus on the UK and European Top500 multichannel retailers (as researched by InternetRetailing) draws both speakers and delegates from the leading companies and the interactive and networking-rich formats offering the usual excellent opportunities to mix with and learn from peers.

IRUK TOP 500

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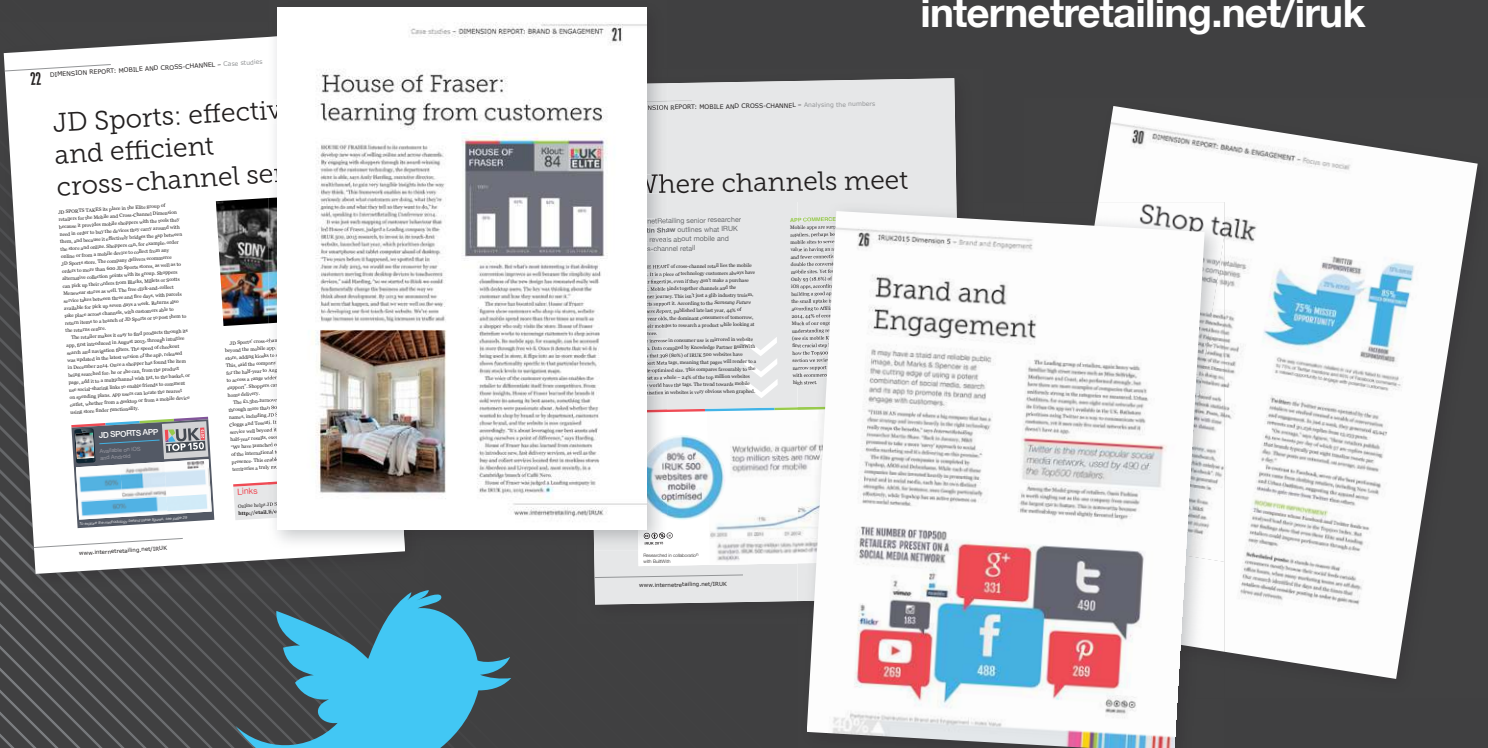
Distributed with InternetRetailing magazine, the dimension reports look behind the results – at the winning business strategies and techniques. Including in-depth case studies as well as numerical analysis, these reports are the perfect companion for aspiring retailers keen to develop best practice.

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