



WAITROSE: SIMPLE, SMART AND SEAMLESS

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Editor's comment



LOCATION, LOCATION, location. How much does it matter in a world of omnichannel retail? It still means a lot to consumers in terms of context and different stages of the customer journey whether they are researching on their tablet at home, wanting to touch and feel the product in the high street or having their order delivered to a convenient location.

In this issue of Internet Retailing, we take a look at how issues of location in terms of space and place is altering as the high street, shopping centres, consumers and retailers move towards an omnichannel reality.

Waitrose, which has to handle its own transformation to a seamless experience for its customers, is also efficiently providing a pick up destination for John Lewis orders. In the past financial year, 57% of the department store's Click and Collect orders – a total of 2.5 million – were collected at Waitrose. Robin Phillips, Director of Ecommerce at Waitrose, spoke to me about the company's plans and what the launch of the new Waitrosecellar.com site means for the future of its main grocery site.

In an article on 'Retail challenges: is technology both cause and solution' David Smith at GS1 UK says that technology undoubtedly continues to pose numerous challenges, but can it also enable retailers to properly realise the true advantages that digital can offer? In an examination of omnichannel-ready data he says that "irrespective of where technology is taking us, there will always be a requirement to identify, provide information on, and transfer physical goods through increasingly complex

supply chains and to satisfy the increasingly complex relationship with the end user across this proliferation of touchpoints. Keeping on top of this successfully can appear a daunting and costly prospect at times but while technology poses the challenges, it can also offer its own solutions."

Technology is offering a solution to the issue of store staff not being able to remain as knowledgeable as smartphone-enhanced customers. Shoppers are happy researching online, looking at product data, images, video, zooming in and out, swapping between channels to research their purchase before making the final decision. Sometimes though the personal touch is needed or some extra information that PIM, FAQs or customer reviews can't answer and that's when customers turn to store staff and expect them to have access to information on everything from product comparisons to stock availability and customer preferences and past orders. I take a look at how technology is equipping the omnichannel sales assistant to help customers in every channel.

Research suggests that the UK is lagging behind the US though in terms of omnichannel development and more importantly is below customers' expectations. Three surveys – highlighted in the Dashboard section – shed light on omnichannel thinking on both sides of the Atlantic and why the good news is that most UK brands expect to have an omnichannel strategy in place within 18 months.

But what does all this mean for Britain's high streets which have reportedly been "dying" ever since the first hypermarket opened at

Cwmbran in 1973? Having battled with superstores, shopping malls and out-of-town retail parks will the internet prove to be the final nail in the coffin? Penelope Ody investigates what's happening on Britain's high streets, the disparities between the survivors and hardest hit and why it is not all bad news.

Indeed, as real estate services company JLL predicts that 20% of existing property will be surplus to retail requirements, some areas are booming. Within London, international retailer demand for the right space in the right location has fuelled record rents in the city centre, and the capital continues to benefit from its sought-after position as a prime global destination for those retailers looking for a platform to expand further into Europe.

Joining it all together is mobile, but it has moved on from being the glue to hold the channels together to an enhancer of customer experience and sales aid for customers and staff in store. Paul Skeldon takes a look at how mobile, beacons and other ecommerce technology is set to keep bricks and mortar alive and thriving for many years to come. He also brings an update on mobile payments, which may be the talk of retail, but with so many technologies to choose from, which are going to be the winners? It won't be a technology that wins, believes Paul, but the convenience and engagement m-payments brings.

And convenience for the customer is, of course, one of the big drivers behind all discussions around location.

Emma Herrod
Editor



The German market in a box.

www.plentymarkets.co.uk



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

MULTICHANNEL PROFIT DENTS ARGOS

Multichannel was key to driving Argos' sales growth in its latest financial year reported parent company Home Retail Group but investment in its digital future hit bottom-line profits.

The general retailer's sales rose to £4bn in the year to 1 March, from £3.9bn at the same time last year, while sister company Homebase's sales rose to £1.5bn, up from £1.4bn last time.

In all, Home Retail Group saw annual sales of £5.66bn, up 3.4% from sales of £5.47bn last time. But pre-tax profits, at £71.2m, after exceptional charges of £41.4m were down 41.1% from £120.9m at the same time last year. Exceptional items included a charge of £25m in relation to the selling of payment protection insurance and one of £27.8m related to the costs of Argos' programme to transform itself into a digital leader. There was also a credit of £11.4m related to a former warranty programme.

Argos' internet sales accounted for 44% of total sales, including mobile commerce which grew by 89% to account for 18% of total sales.

The company said it had now trialled its hub and spoke

distribution model in 49 stores, and piloted six digital concept stores. The hub and spoke trials, said the company, "provided good operational and customer insight and equipped Argos for further expansion of the model in future."

John Walden said Argos had delivered like-for-like sales growth, with categories including electricals doing particularly well. "Growth in these categories more than offset small sales declines in furniture, homewares and jewellery," he said. "Argos' multichannel performance, particularly in mobile commerce, was a key factor in this growth."

Meanwhile, Homebase grew multichannel sales by 53%, which now account for 7% of total sales, and launched next-day delivery. "Digital channels and multichannel experiences are no less important for Homebase, as the role of the internet in the shopping journey for both DIY and home enhancement products is beginning to develop," said Walden.

Looking to the future of the company, and of multichannel retail, Walden said stores would remain at the heart of the business. "The group's portfolio of 1,057 stores remains a core component of its multichannel offer," he said.

HIGH STREET HELPS N BROWN

N Brown Group has announced plans for further store openings, including a flagship Simply Be and Jacamo on London's Oxford Street as it reports that existing stores have helped boost online sales. The retailer, whose brands also include JD Williams, Figleaves and Julipa, has in recent years experimented with moving previously online brands onto the high street. It is moving towards its target of 25 stores for its Simply Be and Jacamo plus-size brands.

The Group revealed total revenue for the year to 1 March of £834.9m, up by 6.4% compared with the previous year. Like-for-like sales grew by 6.3%, while pre-tax profits rose by 0.9% to £97.3m. They were held back by £6.2m losses from investment in areas including international trading and the Simply Be/Jacamo stores: operating profit was up by 4.7% at £107m.

Ecommerce sales rose by 9.1% to £463m, and now account for 58% of sales. Some 40% of all online sessions now come through mobile devices. The company said the fastest growth had come from male and younger female shoppers, segments that delivered, respectively, £23m and £16m of revenue growth.

But growth has also come through its stores. Like-for-like sales from more mature Simply Be/Jacamo stores were up by 35%. So far there are nine such stores, and the company plans to roll out seven more by October.

The stores, said N Brown, were helping to build brand awareness and were also boosting online sales. It pointed to an online 'halo' effect: online sales are 7% higher in the 45-minute drivetime area around Simply Be stores, and 3% higher around Jacamo stores, compared to areas without a store.

TESCO CUTS MULTICHANNEL COSTS

Tesco has launched a campaign to cut the cost of convenience, offering click and collect grocery service for free across the country, while home delivery slots now start at £1. Delivery saver prices are being cut to £60 for an anytime plan and £30 for a midweek plan. Currently some 200,000 Tesco customers have signed up to its delivery saver plan. In parallel, the supermarket is also cutting product prices on more than 30 products.

The news comes after Tesco Chief Executive Philip Clarke promised to improve the value that it offers customers while also making shopping more convenient by improving the different ways of buying.

He unveiled flat full-year group sales, excluding petrol, of £70.9bn, up by 0.3% on the same time last year. In the UK alone, total sales fell by 0.1% to just over £48bn, while like-for-like sales, including VAT and excluding petrol, were down by 1.3%. UK trading profit fell by 3.6% to £2.2bn.

Online grocery sales rose by 11% and online clothing sales grew by 60% during the year.

At the time, he put the emphasis on customer-centric multichannel retail as he vowed the supermarket would be transformed by a "relentless focus" on giving its shoppers the "most compelling offer".

Clarke said the supermarket group was "determined to lead the industry" at a time when the commercial environment is "changing faster than ever before." The shift to online shopping, he said, was accelerating, hitting the performance of larger Tesco stores. Multichannel leadership, he said, would be critical, at a time when shoppers want to buy where and when best suits them.

NEW SITE FOR HARVEY NICHOLS

Harvey Nichols has moved closer to multichannel retailing with the launch of a new website. The upmarket department store's new site is optimised for both mobile and tablet, and boasts new personalised services linking online and the store. Click & Try, for example, enables customers to book a one-to-one appointment with a Harvey Nichols style advisor, who will have their online order to hand, as well as other recommended outfits.

Customers can also create their own MY HN page, where they can update their profile, create shortlists and check the status of online orders.

The site, designed in-house and built by agency Ampersand, also features improved product imagery, fixed-top navigation that allows customers to specify brand, size or colour without going back to the top of the page and a range of editorial content.

Sandrine Deveaux, Multichannel Director comments: "The new site is the first step in our multichannel journey. It offers an enhanced experience both instore and online."

GAP PUTS OMNICHANNEL TO THE FORE

Gap is putting omnichannel at the forefront of its strategy for the year ahead as it expands its reserve in store service to all Gap stores in the US by its second quarter, enabling shoppers to reserve items in more than 1,000 Gap and Banana Republic store both through online and mobile. The US fashion retailer trades in the UK online through gap.co.uk, bananarepublic.gap.co.uk, and about 150 Gap stores, also offers find in store and ship from store in the US. It will also be testing a new order in store capability, which will give customers instant access to the full online range from the shop.

The company is also looking to overseas expansion, where it sees China as the market with the largest growth potential. There, it predicts, sales will reach \$1bn in three years, both through its Gap and its Old Navy brand.

"We have the world's best collection of American brands coupled with a strong economic model and runway for global growth," said Glenn Murphy, Chairman and CEO.

CHINA POTENTIAL FOR HOUSE OF FRASER

It may be the big emerging market of the future but in the meantime, UK retail businesses have found the Chinese market difficult to tackle. Many, notably Tesco, have opted for joint ventures with local retailers as they tackle the market. Nick Robertson, Chief Executive of Asos recently commented on the difficulty of moving into the market even as a pureplay that has no need for complex infrastructure. Speaking on the day the online fashion retailer released its half-year results, he said that selling in China was a "more onerous" proposition than many realised, thanks to complex regulations and rules. That's why the pure play was upping its China-related losses for the current year to £9m, from previous guidance of £6m.

So, House of Fraser's acquisition by Chinese retail business Sanpower looks set to give it no doubt much-welcomed inside track for a future entry into the market. Conglomerate Sanpower is experienced in the Chinese retail market, as owner of IT and services retail chain Hisap. It also owns

China News Week, and has real estate, financial services and information services interests. All of this adds up to inside knowledge of complex Chinese regulations. John King, Chief Executive of House of Fraser, has been reported as saying that the deal would be an "opportunity to take the brand to China." The House of Fraser deal is understood to be Sanpower's first acquisition in the market.

Despite the market expertise of its new parent company, the easiest way to take distinctively British retailer House of Fraser into the Chinese market could well be online. The cost and difficulty of doing so is less than the cost of opening new stores in China. China is also so large that a store, likely to be visited by a tiny fraction of the country's population, or even a chain of stores, could have much less reach than a website. It's notable, therefore, that Sanpower's chairman Yuan Yafei has a track record in speaking up for the gamechanging power of ecommerce.

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FOOTBALL GETS RESPONSIVE

Norwich City Football Club has launched what's believed to be the Premiership's first responsive ecommerce website.

The website was developed by PureNet to be responsive on any device, from smartphones and tablet computers to PCs. Features include social feeds, wishlists and personalisation. The solution also integrates with the football club's back office systems, ticketing, CRM and stock management systems.

Dr Paul Gibson, PureNet chief executive, said: "We were delighted to be selected to work with a Premiership Football Club with such a strong fan base. PureNet pride ourselves on innovation and building for the future, we are therefore thrilled to have delivered the first responsive website for a Premiership Football Club. This project really enabled us to show our creativity and passion for website design and is a fantastic

achievement for all the team involved."

A Norwich City FC spokesperson said: "PureNet have a proven track record and have identified a business need for the football industry. They have always delivered for their clients in a difficult environment and we look forward to having future significant sales success."

UK LEADS M-RETAIL REVOLUTION

A fifth of all online transactions in the UK are set to come from mobile by the end of this year, accounting for a whopping £7.9bn being spent through the channel. And the picture is pretty rosy across the rest of Europe, if The Centre for Retail Research is to be believed.

Mobile shoppers in Europe are set to spend £19.8bn in 2014, almost twice as much as last year's spend of £10.7bn according to new research commissioned by RetailMeNot, the world's largest digital coupon marketplace and operator of Vouchercodes.co.uk. The study, conducted by the Centre for Retail Research, found that Brits are the biggest mobile shoppers in Europe with a forecast spend of £7.9bn this year, up from £4.9bn in 2013.

Although almost half (48%) of people in Europe now have a smartphone, just one in five (20%) have used their mobile device to access a retail site in the previous 3 months. The study shows that the UK is the most mature m-commerce market in Europe, with 28% of people having used their smartphones to browse online stores within that period, followed by Germany (27%) and Sweden (21%). Shoppers in France and Italy are least likely to use mobile devices to visit retail websites, with just one in ten (12%) of shoppers doing so.

Globally, the study found that the US is home to the world's biggest m-commerce market; according to the research mobile shoppers accounted for 14% of the £165.3bn spent online last year with a collective spend of £22.8bn.

Comparatively, m-commerce spend in Europe made up 8% of the ecommerce market, driving £10.7bn of the total £111.2bn in online sales. With 13% of British ecommerce spend made on a mobile device in 2013, the UK is Europe's most developed mobile ecommerce market; mobile devices accounted for £5.8bn of the £38.8bn spent online in 2013.

The study predicts that in 2014, m-commerce is set to account for a fifth (20%) of all online purchases in the US and a total spend of £37.7bn – about the size of Germany's entire ecommerce market, which is set to reach £35.4bn this year. In Europe, m-commerce sales are forecast to hit £19.8bn, with purchases made on mobile devices accounting for 13% of all online sales. Brits are expected to spend almost one in every five pounds (18%) online on mobile devices this year, driving £7.9bn of a total £45bn in online sales.

CONSUMERS HAPPY WITH BEACONS

Almost half (45%) of smartphone owners would be 'very willing' or 'somewhat willing' for retailers to send messages to their smartphone, influencing what they buy and where – and making the idea of beacons curiously viable, if the latest research from eDigitalResearch, is to be believed.

Of the 1,300 smartphone owners surveyed, a third believe that personalised, direct messages sent straight to their smartphone when out shopping would 'likely' or 'very likely' influence their purchase decisions, representing a huge opportunity for retailers to boost their revenue streams.

Unsurprisingly, the research finds that shoppers would most like to receive special offers and promotions, as well as discount codes, straight to their mobile, although a handful would also be happy to be sent store or product information.

The fact that messages are transmitted through apps means that retailers also have the opportunity to personalise and tailor promotions based on previous browsing and purchase data in an attempt to increase footfall through shop doors. 78% of those that would be happy to receive messages would be 'extremely willing' or 'somewhat willing' for retailers to use this data if it meant more personalised messages for them.

Derek Eccleston, Commercial Director at eDigitalResearch, explains: "Apple subtly introduced iBeacon technology into the market at the end of 2013. As retailers and brands get to grips with what it is and how it works, consumer opinion demonstrates that it could potentially revolutionise the in-store and high street shopping experience."

He continues: "We found last year that half of smartphone owners regularly shop through retail apps and have them installed on their mobiles. It opens up the potential for retailers to digitally reach outside their stores and tempt smartphone owners in, increasing footfall and, as these results demonstrate, boost their revenue streams".

Waitrose: simple, smart and seamless

Robin Phillips, Director of Ecommerce at Waitrose, speaks to *Emma Herrod* about the phenomenal growth of the grocer's online business and the launch of its dedicated wine site.

AROUND £262M of Waitrose's £6bn annual turnover is now generated by Waitrose.com. While this may seem like a small percentage of its overall sales, its online grocery business has recorded a significant 41.4% growth over the past financial year.

This growth has been put down to investment in products and services, innovation, personalisation, its continuing adaptation to changes in cross-channel behaviour, plus its new look for the site, which has made it more tablet friendly and easier to register, navigate and search for products.

Like-for-like sales at its physical branches remain fairly constant with 5.1% growth this year. But with Waitrose outperforming the market for 56 months in a row, according to Kantar, most of the growth is incremental as it comes via new transactions online. Customers continue to do top-up shops in store but are completing their 'full' shop at Waitrose.com. "People are realising they can do a full shop and keep their behaviour of topping up with us," says Robin Phillips, Director of Ecommerce, Waitrose.

Growth in 2014 has been particularly strong following a four-week television advertising campaign in January highlighting Waitrose.com and the home delivery service. Online has since grown by 110% and become as much as 20% of all transactions at one branch.

"Our customers are technology savvy and heavily armed with kit," says Phillips. "Although that's a plus, it's also a challenge since customer expectations are high and set by the likes of Amazon and John Lewis. However, the John Lewis basket is 2 or 3 items and they don't have to be picked from different locations



and be kept at different temperatures until they are delivered to the customers' door. It's like doing 1-click with Amazon but we're trying to be 'simple, smart and seamless' with a 50-item shop (from a choice of 20,000 skus) that has to arrive in great condition, with the right sell-by date. That's very different."

He adds: "Customers expect a Waitrose experience that's relevant to the technology they're using; where they are on their shopping journey; and their emotional state – whether that's transactional or inspirational. We try to give customers the most relevant and helpful experience, whichever touchpoint, device and channel they are using."

The tablet is increasingly important to the retailer since one third of transactions are now made via this medium, according to Phillips. The current iteration of the Waitrose.com site is built on the IBM WebSphere platform with HTML5, so it gives customers a good experience on all devices, including tablets. An upgrade to the latest WebSphere platform is in Waitrose's digital roadmap for its main grocery site following the launch of its waitrosecellar.com wine site.

As other retailers have found, shoppers are using their tablets in the evening when they want inspiration and offers as well as a purely transactional experience. They are planning the weekend's dinner party, seeking inspiration such as a recipe from chef and face of Waitrose Heston Blumenthal or looking for wine to go with it, explains Phillips. The site will flag up occasions such as Mother's Day so customers can start planning a dinner they can cook themselves or have it pre-prepared through the firm's made-to-order service. Full details are given under a separate 'entertaining' tab.

Some customers start their shop by looking at the items that are on offer, explains Phillips, while others go straight to typing in their entire shopping list in the jotter application, which then searches for them. Their favourite items or brands, based on past purchases, are offered as the first result. For example, 2 pints of Cravendale semi-skimmed milk might be shown as the first option in a selection of milk bottles as the most often or usually purchased milk brand. For those shopping on a tablet, it is then simple to swipe across the row of bottles to see alternatives.

New customers can see suggestions of full shopping baskets or import their list of usual purchases or favourites from other online supermarkets functioned by mysupermarket.

CELLAR HINTS AT THE FUTURE

Waitrose's new wine site, waitrosecellar.com, which launched in early May, is part of its mission to inspire customers, however they buy. "This isn't just about inspiration in our digital channels, it's about the store environment as well," said Tony Rivenell, Head of Omnichannel Delivery at Waitrose.

The site features a wine finder, recommendations from wine specialists, tasting notes and videos from the company's award-winning wine buying team and in-store wine experts. It is Waitrose's first to feature ratings and reviews, using Bazaarvoice technology. Individual customers will see relevant content that's personalised to their interests.

"It's creating a much richer, much more engaging environment, that brings Waitrose to life," said Rivenell. He said the Cellar was the first example of an approach that would be extended across Waitrose's sales channels. It's also the first Waitrose site to be based on the latest version of the IBM WebSphere platform.

The Waitrose vision of a joined-up future is illustrated by typical customer, 'Mrs W'. She might be invited to the store for a personalised tour. On arrival, she might have something to eat from the grazing bar before being shown to the wine department to be talked through the wines recommended for her on a particular day, said Rivenell. Once she's seen that information she can scan the bottle of wine herself, using a mobile app released soon after the website, to get more information. She might choose to buy from the extended range that's stocked online, checking out using her myWaitrose details or at the in-store point of

service. Once she's bought a wine, tasting notes will be sent to the phone.

In future, said Rivenell, "a customer can turn up at the store, pre-order their goods, one of our partners will pick and pack that for them, the customer can graze the store, and through a concierge service take delivery of their goods. It's a much more experiential service and that first comes to life with the Cellar."



com. Phillips says that customers generally have a list of 100 items from which they regularly purchase.

The mobile site and iPhone app make it easy for them to alter their order or add items that they forgot in their original shop. It also includes a barcode scanner through which they can get further information about a product or add items to their shopping list. The retailer is further developing the experience of the in-store shopper using the Waitrose mobile app on their phone.

It's also developing the online experience as it draws further on the expertise of its partners - its name for all members of staff who are co-owners through its co-operative business model. "Partners are at the heart of what we do," says Phillips, which is why their faces can be found on delivery vans as well as online to help signpost shoppers on their journey around the site.

Customer experience, product quality and the partners are the main reasons why ►

How do you get the warmth and authenticity that customers receive in branch and translate that online?

customers visit a branch of Waitrose explains Phillips. Customers trust the partners, often knowing them or being friends with them in branch. Online, customer expectations are high so technology standards have to be high as well. What remains important, he adds, is the personal touch. So the challenge for ecommerce, says Phillips, is: "How do you get that warmth and authenticity that customers receive in branch and translate that online and onto the site itself?"

For customers having their shopping delivered, the face of the brand is the driver's. Another way of reinforcing the personal touch is to showcase partners online. They are already used to signpost customers around the site, and the company has been busy filming partners in store sharing their expertise for the new wine website, which launched in early May. One of the wine specialists at the Stratford branch has been tweeting about wine and connecting with customers after starting the initiative himself. Waitrose does have a social media team, led by Julia Randall, and Phillips says the retailer is "experimenting and innovating" with this medium, explaining that branches have "freedom within a framework".

An upgrade to the latest version of WebSphere is planned for the main Waitrose site with Phillips seeing "quite a role for video and integration of Waitrose TV throughout the site". This could be showing a video of a recipe being cooked alongside the recipe text so "bringing together the transactional journey with the inspirational one in a way that's seamless".



MYWAITROSE

Some 70% of all Waitrose transactions are made by 4.5m myWaitrose cardholders with the card proving a valuable source of data and giving opportunities for personalisation. It will be "very significant for us in the future," says Phillips.

The card is the company's way of saying thank you to its customers, he explains. It's personal, wanting customers to feel that Waitrose is a trusted friend. "We're conducting an adult-to-adult conversation," he says. "We're not stalking them on social networking." He emphasises that the company has to behave in "ways that our customers expect us to" and that are "consistent with the brand".



Customers have told Waitrose that they don't like major changes, so there will be no more "big blockbuster developments" on the site as the company moves to a process of continual and more iterative developments. That's not to say that there won't be changes, adds Phillips. But they'll be gradual improvements that are noticeable if you look at the site at the end of a year and compare it to the beginning, he explains. This is helped by the business and systems teams at Waitrose working next to each other as they hot desk.

"It's better for the customer and the teams," says Phillips. "Customers don't particularly like massive change at once, they like improvements."

PARTNERS & STORES

The role of stores is changing, too – they are becoming multichannel hubs with welcome desks at their entrance to replace the customer service desks with additional tasks including welcoming and greeting customers, and click and collect points for Waitrose and John Lewis orders. All stores will eventually be equipped with the new desks and tablets to help partners explain products to customers, place orders for entertaining and celebration cakes and process meals and snack orders at in store grazing bars. To date, over 4,000 devices have been issued to partners in branches with 100 of the 308 stores refitted with the new click and collect desks.

Two stores have been equipped with large tablet screens in a wine concept area enabling partners to help customers to choose wine from the 1,500 skus available for home delivery via the waitrosedirect.com site and further technology is being trialled at the new Swindon store. Customers can use an ►

“Integrating content, inspiration and commerce is what we need to be doing online to give a really fantastic Waitrose brand experience”

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interactive kiosk to find out more about wines or recipes and a screen in the cafe area is streaming Waitrose TV.

Having tech savvy customers with the latest technology is a challenge in store since Waitrose needs to ensure its partners are similarly well equipped. “We’ll be investing this year,” says Phillips. “We are increasingly looking at how phones and tablets can be used by our partners. The retailer will be innovating further with tablets to make stores into destinations in the way that it is doing with its 2 wine concept stores. “We’re wanting to trial lots of technology and see what works for us,” he explains.

ON A ROLL

Along with growth has come the need to increase capacity. The company has doubled capacity for online grocery and “we’ve pretty much filled that up,” explains Phillips. What started out as 200-300 orders a week being fulfilled in each branch has now reached a norm of 1,000. On top of this is the huge

growth in the number of John Lewis orders being collected at Waitrose stores. In the past financial year, 57% of the department store’s Click and Collect orders – a total of 2.5 million – were collected at Waitrose.

The time has come to look at maximising space in terms of collecting online groceries, explains Phillips. A Milton Keynes store has its own ecommerce hub for e-fulfilment where partners can assemble orders once they’ve been picked in store. “It may mean becoming a 24-hour business, picking through the night or early morning during busy times” he says. In store space could also be used differently as branches become 24-hour places of work.

In the meantime, a second dotcom store is opening in Coulsdon in September, to handle the increase in orders in London. It has also announced plans to open a national distribution centre (NDC) in summer 2015, to “enable more sustainable growth” and handle the distribution of the around 25,000 nationally available grocery and home department lines ►



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TESTING TECHNOLOGY

Chloe Rigby, IR's Online Editor, visited Waitrose's new store in Swindon to find out about innovations in store and trials of mobile customer service apps. One demo application uses PayPal and QikServe technology to enable shoppers to place their order at its in-store juice bar before they arrive in store. Once the order has been placed and paid for via the shopper's own device, a message visible on the juice bar iPad shows a picture of the shopper so that staff recognise them on arrival and can hand over their order with a smile. The shopper can share their transaction via social media.

The store is also testing the use of mobile technology to improve customers' journeys around the store and another app, being trialled internally, uses the Quick Check scan and shop technology to ease a customer shopping journey from scanning items at home to using beacon technology in store through to payment on their smartphone.

that can be found in Waitrose branches and on Waitrose.com. The NDC will deliver the national lines via Waitrose's four regional distribution centres to simplify the supply chain and improve efficiency of handling nationally available lines that have historically had to be sent between RDCs.

There is also more development to come in terms of grocery collection, such as drive-through (which is being trialled at five stores) and collection lockers. "We're experimenting with collection from store as well as with collection lockers, such as the trial with Transport for London (TfL) at which lockers will be placed at stations at the ends of the lines," explains Phillips. "The rise of collection will be interesting for grocery," he adds, whether it's through delivery from its own branches, John Lewis stores, Waitrose convenience stores or third party sites such as the pilots being run with TfL, which starts in the second half of 2014.

"We're looking at other locations," says Phillips including other transport hubs, convenience stores and John Lewis stores, but these are still in their trial phase.

A bank of lockers is currently being tested for grocery collection by staff at its Bracknell headquarters. The lockers, supplied by ByBox, include a touch screen on which the customer enters the PIN they were given when they checked out online. This enables them to open freezer and refrigerated compartments as well as the specific ambient temperature locker containing the rest of their grocery order.

In future, lockers will include all three different temperature areas so customers only have access to their own order. At present, Waitrose staff can order groceries for delivery to the lockers in the same way as completing any other order online. The lockers have the same cut-off times as other online orders and shoppers have a half-day window for collection.

According to Phillips trials will "probably" continue until the end of the year since "we

have to make sure that it works really well".

He points out that as well as the challenges of making sure that they get the service right and that it works properly for customers, retailers also have to take into account that customers expect to access all services at all locations.


NEXT STEPS

Seamless integration is the next step for Waitrose in its "simple, smart and seamless" plans, explains Phillips. It will also be looking at how it brings all of the improvements to the different channels together. "Mobile and collection are the multichannel glue that hold them together," he says.

"It's about apps in the future," he adds and what the retailer does with stores and the role of collection to bring that together. From pre-shop through to payment and then fulfilling the order, it's all about having the right picking devices (such as ones that will work in walk-in chiller areas in the new dotcom store), more efficient vans – which are being rolled out – and making the doorstep experience better so drivers can resolve issues on the doorstep rather than the customer having to phone customer services. "We're looking at points of friction and taking those away."

There are also supply chain efficiencies and shelf replenishment issues to be overcome as online continues to grow: Waitrose needs to make sure that there is enough produce in each shop both for online orders and the customers who shop in store. Availability alters throughout the day, so it needs to increase the accuracy of its data about what's ordered and what's delivered. "That's just as important as the online experience," comments Phillips.

With customers' love for the brand being reflected in the phenomenal growth in its online service and the company's digital roadmap drawing on the strengths of the brands' messaging and partners, it will be interesting to see how Waitrose integrates the channels and pushes forward to innovate.

Online, it's the new wine site, launched on a new version of the WebSphere platform, that will give a clue to how Waitrose.com can evolve when it brings together its triumvirate of strengths: its partners, its investment in technology and the high expectations of its customers. Integrating content such as videos and Waitrose TV, with inspiration and commerce "is really what we need to be doing as a brand online to give a really fantastic Waitrose brand experience," concludes Phillips. 

“Mobile and collection are the multichannel glue that hold the channels together”

Effective search: the strategic solution to the customer satisfaction challenge?

Great customer service is a key ingredient of sustained business growth. Companies with effective customer service listen to their customers and work out how to address their needs. Marcus Law of SLI explains how SLI's Learning Search helped leading UK seed and plant retailer Thompson & Morgan do this, helping online shoppers connect to the products they are most likely to buy, directly driving increased sales and higher customer satisfaction.



THE IMPORTANCE OF EFFECTIVE ON-SITE SEARCH

For retailers like Thompson & Morgan, where 60% of the company's sales have moved online, on-site search means highly relevant results, merchandising, faceted navigation, social content, and is one of the most critical components of website performance. Optimising site search enables customers to find the right products they want to buy quickly and efficiently, according to group e-commerce manager, Clare Dixey. SLI Learning Search does this through continually improving search relevancy through intelligence gathered from visitors' search queries and click-throughs, helping visitors more easily find and purchase what they're looking for. The solution is dynamic, so results change order as customer buying trends and search terms shift, keeping results highly relevant.

Dixey says, "The unique names of many gardening products can be hard to spell correctly, and our previous search often turned up 'no results' or poor results when the exact right term wasn't used." That makes Auto Complete essential for Thompson &

Morgan - it helps customers identify many hard-to-spell names. She continues, "Offering visitors search suggestions as they begin typing in a keyword is really important in helping them finding the right product more easily, and improving the overall experience."

MERCHANDISING DRIVES BUSINESS GROWTH

SLI's Merchandising Console provides merchandising capabilities which, Dixey says, is fantastic for the business. She says, "If users search for a specific term, not only can we send them to a specific landing page, but we have the ability to show specific merchandising banners which can be applied to all users, or only to searches which meet particular criteria. We also have the ability to change the order of results. It may well be that we have a surplus line or have a product that's been in the news. We can change the order of results in order to make sure that this is the first product that people see."

Redirects allow the company to enter a specific page in response to a search, something Dixey uses for the "no results" page. She says, "If the user doesn't find what they want on search, we feel it's very important that the user doesn't get a dead end page. SLI enabled us to turn this into a merchandising page, so if this scenario occurs our top ten sellers are displayed."

One of the challenges facing Thompson & Morgan was that despite having refinement

information, they couldn't bring all the information together in one single source. A customer might want a perennial plant that is easy to grow, with pink flowers that blossom between July and August so, working closely with the SLI team, they created the Garden Plant Finder. This is a unique feature in online gardening retail and a valuable tool that helps customers narrow down the types of results they want to see. "For every online retailing challenge we've faced, SLI always come up with a solution. The best thing about SLI is that it's a results engine that we don't really have to touch - it's brilliant in terms of resources," said Dixey.

Site Champion is SLI's user-generated SEO solution, driving traffic and revenue to a retailer by using popular customer search terms to create optimised landing pages in the major search engines.

"Site Champion really complements the SEO activities that we do in-house. It drives a lot more referrals for non-brand traffic to our site, which then converts to sales," said Dixey.

CONCLUSION

The results speak for themselves: Only 21% of site visitors use the search box, but those visitors are generating 47% of the total site revenue. Additionally, SLI's site search conversion rate is 74% higher than the site average; the average order value for search users is 30% higher than the site average; and the bounce rate for site search users is 45% lower than the site average.

UK lags behind customers and the US in omnichannel

Three surveys have shown recently how the UK is lagging behind the US in terms of omnichannel development and below customers' expectations. *Emma Herrod* discovers that the good news is that most UK brands expect to have an omnichannel strategy in place within 18 months.

ALMOST HALF of US retailers (43%) have a fully integrated omnichannel approach against just over a quarter (27%) of UK retailers, according to a study by business operations consultancy LCP. Although the US is further advanced, both UK and US retailers agree that the greatest overall benefits of going 'omni' are an enhanced business operating model and increased sales.

The LCP Insight paper, 'Omni-channel: a UK v US perspective' also revealed that fulfilment and integrated IT systems are the most important business and operational capabilities in need of development to meet customer and market expectations. In the US, these changes are already underway - or will happen in the next year or two - while the majority of those in the UK think change will be needed in 3-5 years or more.

The paper says that the motivation on each side of the Atlantic provides another clue to the different stages of omnichannel maturity:

- In the US, 27% of retailers cited pre-defined ROI targets as their motivation for investing in omnichannel, against just 16% in the UK;
- More than one third in the UK saw the simple "need to compete" as the key motivation.

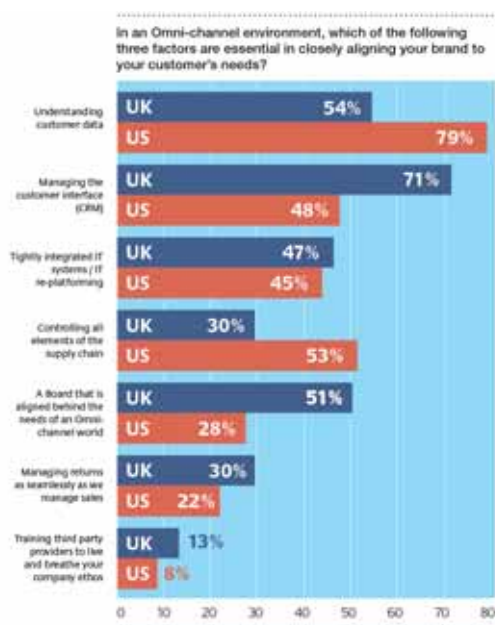
The retailers' agreement that the greatest overall benefits are an enhanced business model and increased sales clearly shows a major step forward from the perception that it is simply the supply chain's response to demand from new sales channels – to a driver for a wider change in corporate culture and adding direct value to the business.

"With US retailers further advanced and taking a more holistic approach to going omni, they are able to identify operating costs savings as well as stock availability improvements – so they can also identify a clearer return on investment," says Stuart Higgins, Retail Partner, LCP Consulting.

HYBRID STORES & INCENTIVISING PEOPLE

There was also greater recognition in the US that to achieve success the role of the retail store must be redefined and clearly articulated in the future. All respondents recognised that hybrid stores of some type will be required,

but US retailers more clearly recognised this will involve new store assortments and reduced stockholdings along with more knowledgeable and informed store staff to actively advise customers on their purchases. The latter, starts to clearly position people at the heart of the change to an



Source: LCP



integrated retail approach.

UK and US retailers agreed that developing new measures and incentives to promote integrated thinking was the most important element in ensuring employee-support for an omni culture. However, in the US, this people-centric approach is more likely to be a theme that is carried through the integrated approach. For example, empowering employees to deliver excellent customer service, or changing the role of store staff from simply serving customers to informing their choices, were both high on the US list.

In the UK, respondents were more process-focused, stating that providing store-based staff with a single view of the retail world, or ensuring more visibility of the true cost of service, were key areas for employee development.

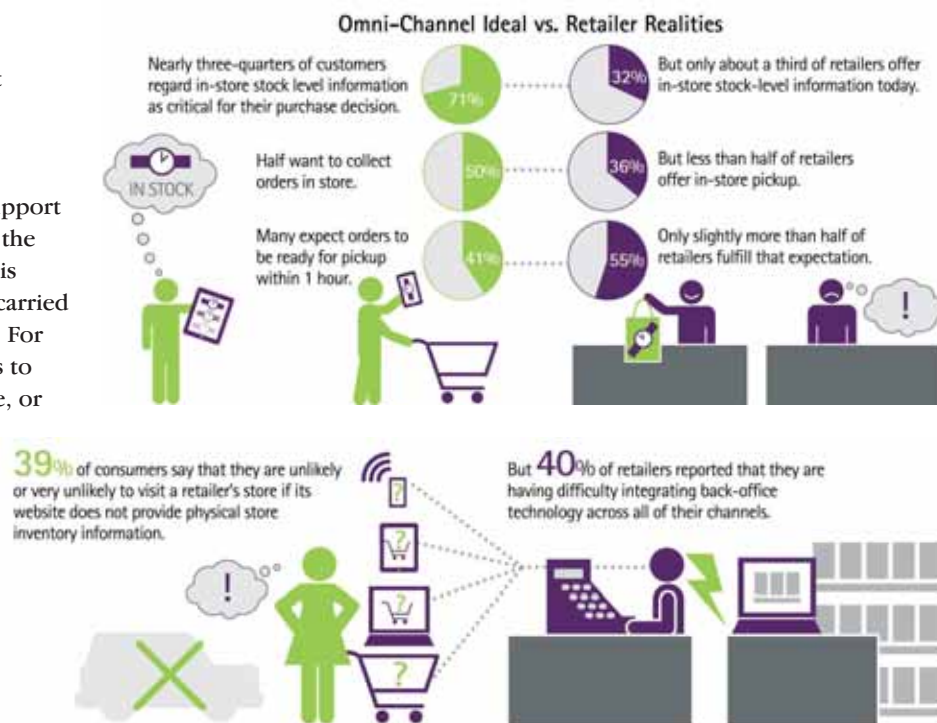
CUSTOMERS

While US retailers may be ahead of the UK in terms of omnichannel, a study by Accenture and hybris shows that customers are ahead of retailers in their omnichannel ambitions with 71% of consumers expecting to view in-store stock online and 50% expecting to buy online and pick up in store. Yet, only a third of the retail decision makers surveyed – in the US, UK, France and Germany - said that their companies are able to provide customers with in-store pickup of online purchases, online visibility of cross-channel inventory and store-based fulfilment of online orders. All of these capabilities are considered vital for seamless retailing.

“Thirty nine per cent of customers surveyed say they are unlikely or very unlikely to visit a retailer’s store if its website does not provide physical store inventory information,” said Chris Donnelly, Global Managing Director of Accenture’s Retail Practice.

“Additionally, the research also shows that retailers who struggle to implement robust seamless capabilities online also experience challenges meeting customer expectations in offline channels. So this is a particularly big challenge that requires immediate attention.”

While retailers may be struggling with omnichannel capabilities at the moment the future is looking brighter for customers’ expectations with most UK brands expecting



Source: Accenture

39% of customers are unlikely to visit a store if its website does not provide store inventory information

to have an omnichannel strategy in place within 18 months.

It appears though that pureplay and multichannel retailers are working to different definitions of what constitutes an omnichannel strategy. For while all of those who took part in a survey by SLI Systems thought mobile was key to the implementation of an omnichannel strategy, pureplays were less likely to consider offline as an area to be explored: only 15% of respondents said kiosks played a key part, while 61% said bricks-and-mortar did. By contrast, 97% said optimising for tablet was important, and 95% rated the importance of the online environment, for desktop and laptop.

“Both communities are trying to use omnichannel to play to their strengths. Pureplay ecommerce businesses are seeking to stick with the model that brought them success in the first place – keeping overhead low and focusing on the techniques that drive online business growth. On the other hand, bricks-and-mortar retailers are trying to exploit the advantages that come with having physical locations in the same neighbourhoods where their customers live,” says Tim Callan, Chief Marketing Officer at SLI Systems.

David Kohn, Multichannel Director at retailer Snow + Rock, said: “As a business that has bricks-and-mortar stores as well as online, we see delivering a consistent customer experience through all channels as both our key challenge and our key opportunity. The survey suggests we are not alone in this.”



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Retail review

RETAIL LEADERBOARD	
John Lewis	83/100
M&S	80/100
Argos	75/100
IKEA	75/100
Oasis	66/100
Majestic Wines	56/100
J Crew	50/100
Morrisons	27/100

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 Marks & Spencer.

RETAIL STRATEGY 25/25

EMMA ROBERTSON, MANAGING DIRECTOR, TRANSFORM

M&S digital channels have been in growth and outperforming stores for the last few years making it harder for the new infrastructure to prove its commercial benefit against some already hefty YOYs. In addition, the market remains unconvinced about the M&S product range in many areas, with womenswear continuing to come under scrutiny around target customer, conflicting brands and fashion credentials. The multichannel experience can only go so far to drive the business forward if the product proposition remains unclear.

However, in the new website M&S has a strong channel proposition, and the flexibility to adapt to a changing market and customer base. To quote the famous M&S Food adverts – this is not just a website redesign, this is an M&S website redesign: a multichannel strategy spearheaded by the website, with a generous side order of cultural change and underlying infrastructure. Tuck in.

WEB EFFECTIVENESS 20/25

NICOLA DUNLOP, USER EXPERIENCE ANALYST, USER VISION

On a whole Marks and Spencer is a prime example of an effective ecommerce site. The revised structure effectively follows user expectation with good use of navigation titles and calls to action

throughout. The product page in particular successfully guides the user through the experience while setting an exemplary balance between contextual images and product information. In addition, the style and editorial section offers diverse, fresh content that will inspire and engage a range of user types both regular and new. Slight issues were identified in how this information was displayed to the user as well as the basket summary pop-over, yet in general this is a leading retail site.

MOBILE 15/25

ROB THURNER, MANAGING PARTNER, BURN THE SKY

The mobile site provides the high standards of user experience I would expect from M&S, particularly around search and navigation, with an excellent use of filter options for easy browsing of an extensive product range.


The browsing experience is significantly better on tablet than on mobile – where high quality images come into their own, and the style and living section gives the site an editorial feel. No doubt the teething problems on the mobile site and the check out glitches – noted in my



longer review on internetretailing.net - are being addressed to bring the mobile site up to scratch.

INTERNET RETAILING IN STORE 20/25

LOUISE GARVIN, CONSULTING MANAGER, JAVELIN GROUP

The key omnichannel building blocks are now in place after 3 years of investment. The "Shop your way" proposition is a real strength, with flexibility for the customer to order in any channel, for delivery in any channel. With the launch of the new platform and API stack, the ability and pace to innovate should pick up building on in-store innovations to date such as Virtual Rails, showcase Browse & Buy points in-store and equipping store colleagues with iPads. M&S appears to have a real appetite to test & learn which will be key to evolving the in store digital experience. Personalisation currently is somewhat limited to the app, but will likely be the next major focus to shape future digital store interactions. 

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Frontline Multichannel



While we consider the store and the physical dimensions of multichannel in this issue, *Ian Jindal* considers the vital role of frontline staff in delivering the multichannel vision and experience to our customers.

LAST WEEK, I found myself in Birmingham and walking from Birmingham New Street to Selfridges' impressive store. I was left in no doubt about the scale of investment in the city centre and the important role of the store in retail. "Iconic" is an overused word, but the 'blobitecture' triumph of the Future Systems architectural design holds a real promise to the customer of an extraordinary experience ahead.

Even as the online and physical stores align ever-closer, and digital drives increasing numbers of customers in store, it is the frontline staff who bring the proposition to life.

Major retailers understand this and are investing in their frontline colleagues, who now carry the expectations of the customer and brand, in the face of increasing challenges.

In the first instance, store staff are dealing with a very knowledgeable customer. Forrester's recent Technographics survey shows that 26% of customers research products on Amazon before visiting a store, and 16% have checked the product on a competitor's website beforehand. The customer arrives in-store armed with product, pricing and availability knowledge that can rival that of a non-specialist.

That knowledgeable customer is also a connected customer. With her mobile in-hand she is intolerant of store staff who know less than she does, often cross-shopping and comparing competitor offers and availability in front of our sales staff. Our customer expects our colleagues to be able to add to her own empowered capabilities: know more about the product, understand

how to sell them, to create desire and certainty, and also be able to "drive" the whole business - order management and orchestration, customer service, payment, marketing and promotional messages and everything about our brand.

In short, our frontline colleagues have to exemplify the best of our brand, in all its facets, across all activities and touch points, while also making, saving and growing sales.

Two years ago these would be new expectations. Now, our staff are smartphone-touting, iPad waving, social heroes themselves. They *want* to do more and are waiting to be liberated by the business. Take Rose, whom I met last week, as an example. A beauty advisor, she posts to Instagram every morning her day's makeup. She has over 3,500 followers who ask for tips on colour, brands and style. She is engaged with customers and a source of expertise in the business, not limited to one shift and one store. Rose typifies the empowered, capable and committed colleague that makes our brands more than the bricks and clicks alone.


I have been privileged to work over the last year or so with two great retailers, M&S and Selfridges, on the briefing and culture change programmes to get all working together. Rather than a top-down "get with the programme" approach, the transformation in frontline service is based upon liberating knowledge, enthusiasm and abilities.

What are the ingredients to engaging our frontline teams? Open communication is a foundation - the multichannel plans, channel performance and profitability, and the commercial case for

multichannel all need to be openly shared. Next the stores need to link with centralised promotions, initiatives and magazine content (rather than admitting to customers they don't know what went out in the Summer Fashion email... ouch!). Reward and recognition are key. John Lewis pioneered allocating web sales to stores, thereby removing channel conflict at a sweep, and focusing on customer profitability not channel performance. Ensuring that stores are not penalised for accepting web returns is a linked necessity. Finally we need to 'kit up' the staff - wifi, appropriate devices and the confidence and skills to use with customers, and till systems that integrate with digital so that they can drive all business processes.

In return, we're asking of our staff a level of interest in the broad business offering, to 'walk the web' and understand the range of our offer, communications and activity, and to bring that knowledge - together with their stock, process and operational capabilities - together in a point experience for the customer.

As we seek to bring our brands to life beyond the screen and beyond the architecture, it is through permissioning, encouraging and unlocking the energy and passion of our store colleagues that we will create memorable and profitable experiences with our customers.

If you are undertaking a multichannel cultural transformation do let us know your areas of focus and how you're engaging frontline staff: either by email ian@internetretailing.net, via @etail or in the comments online. 

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Researching International

The latest InternetRetailing research report examines internationalisation and the challenges and opportunities that it offers retailers. InternetRetailing's Research and Special Projects Editor *Liz Morrell* explains how you can get involved.

INTERNATIONALISATION IS moving at a fast pace for retailers eager to extend their reach, search for growth and engage new customers. Our last international report was published in September 2013 and in this issue we are pleased to announce the launch of our second research report examining the challenges and opportunities that internationalisation is offering retailers. The report will hit your desks in September with a live event to present the findings being held in London on 16 September.

As usual, the project will encompass a three month research process, including an email survey, which will hit your inboxes later this month and could win you two tickets to the Internet Retailing Awards on 26 June.

Once we have the early results of the survey we will begin interviewing retailers and industry experts in more depth to understand how they are managing their internationalisation strategies and what they are doing to steal a lead on their peers – and how technology and additional partners can help.

On the note of partners we are pleased to announce two of our sponsors; Neteven and wnDirect.

Neteven is the European leader in international marketplace management specialising in helping online retailers grow their marketplace business cross-border in Europe and beyond. "We operate a flexible web-based SaaS platform with multiple connections and deep integration with the most powerful marketplace channels by country and by category enabling businesses to conquer the European ecommerce market simply and efficiently," says CEO Greg Zemor.

Leading European merchants have chosen Neteven to distribute globally on eBay, Amazon, Rakuten, Zalando, Spartoo, PriceMinister, La Redoute, Fnac, Rue du Commerce, Otto, Pixmania, Cdiscount, Play, Galeries Lafayette, Mistergooddeal, Atosho and Brand Alley to name a few.

Zemor points out that internationalisation strategies go far beyond simply launching an international platform and that Neteven can help with all the obstacles a retailer may encounter. "Businesses face a number of challenges when going cross-border that are not specific to international retailing, and that they have already encountered in their native market. However, these challenges take on a new spin when approaching new markets and require different solutions," he says.

These include the challenges such as how to effectively present and position a brand, how client expectations differ from one country to another, how to handle customer services and what products shoppers are really looking for in each territory, explains Zemor. "Neteven can assist with all of these points by helping define strategy using marketplaces as a channel to increase brand awareness, test product assortment, and learn about client expectations and how to handle them," he says.

Also joining us as a sponsor for the project is wnDirect – a relative newcomer to the market that is changing ecommerce distribution and which won new business of the year at the National Business Awards last November.

The company's Marketing Director Amy Collins says the company has big ambitions. "We are trying to be different to the other international


companies out there," she says.

Its fresh approach is working since although only forming two years ago the company has now distributed more than 7.8 million parcels.

The company attributes much of its success to understanding what retailers want since its directors have retail experience. "The retail expertise we have on the board means we understand what retailers want to do and that has helped us identify what their concerns are," she says.

The team includes founder and CEO Stuart Hill whose 15 years of retailing at the likes of John Lewis and ASOS helped him come up with the idea for the company as he became frustrated with finding the right logistics partner for an ecommerce world. The result was a new hybrid solution to distribution that offers a mail-type service with the technology that allows the traceability of a more specific courier service.

Collins sees the biggest challenges facing retailers expanding internationally as being the specifics of expansion into areas such as the BRIC markets – highlighting for example the logistics complexities of Russia where the company is still distributing to this day, and the duty implications of Brazil. "These are both solutions that wnDirect have got comprehensive solutions for," she says.

The International Research is your chance to find out more about the challenges and solutions that can help you expand abroad. If you have questions you would like us to ask, or if you would be willing to be interviewed in more depth for the report, email liz@internetretailing.net. And don't forget about your chance to win in the research email survey which will hit your inboxes later this month. 



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Full list of nominees revealed

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MARKS &
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House of Fraser,
John Lewis, Waitrose



HOUSE OF FRASER
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THE CUSTOMER AWARD Sponsored by SDL Fredhopper

ASOS, Cult Pens,
John Lewis,
Lovehoney, Ocado

ASOS
discover fashion online

Cult Pens

Lovehoney
the sexual wellness expert



THE IRIS AWARD

Argos, B&Q, Burberry,
House of Fraser,
Thomson (TUI)



BURBERRY

HOUSE OF FRASER
SINCE 1849



THE INTERNATIONAL AWARD

ASOS, Mothercare, Puma,
RS Components, Wiggle

ASOS
discover fashion online

mothercare



THE BRAND AWARD (New for 2014)

Boden, Graze, Lego,
Made.com, Hungryhouse,
Notonthehighstreet

Boden

graze
nature delivered



THE SERVICE AWARD (New for 2014)

Dressipi,
eBay, Etsy

dressipi

eBay

Etsy

THE MARKET ENTRY AWARD (New for 2014)

AO.com, Lululemon,
MissGuided



lululemon



MISSGUIDED
FEELS, LIFE AND PASSION

The future of the high street

High streets have reportedly been “dying” ever since the first hypermarket opened at Cwmbran in 1973. Having battled with superstores, shopping malls and out-of-town retail parks will the internet prove to be the final nail in the coffin? *Penelope Ody* investigates.



LISTEN TO the retail pundits and you hear that the store is a vital component of the omnichannel offering: a fulfilment centre providing a digitally enhanced experience to promote the brand. Walk down many high streets, especially in less affluent parts of the country, and it seems a very different story. Shop vacancy rates may have fallen in recent months to the lowest in four years, but there are still around 52,000 empty outlets around the country, many of them in those economically challenged districts.

At the same time footfall in the many high streets is declining and is easily affected by adverse weather conditions. According to Springboard, average high street footfall was down by 5.3% year-on-year in February, as heavy rain persisted in many areas. In March it was 2.6% up, the greatest increase for almost a year – although as high street footfall for March 2013 was 7% down on 2012 figures, traffic clearly remains well below the levels of a few years ago and many high streets continue to struggle. Joshua Bamfield, Director of the Centre for Retail Research, argues that around 50% of high streets are coping pretty well, another 20% are in a “very difficult” situation, while 30% “could go either way”.

High profile initiatives, such as the Portas Pilots and Government backing for 330 “town teams”, may hit the headlines, but last year’s report from Bill Grimsey dismissed them as “little more than a PR stunt and to lay the grounds for a lucrative TV makeover show”. If shoppers are continuing to desert many high streets then rather more radical action is needed than simply encouraging pop-up shops and foodie markets.

MANAGING THE DECLINE

“The Government must act to repurpose many of our high streets,” says Tony Stockil, Managing Director at consultants Javelin Group. “Some will have to return to residential use and we’ll be left with fewer, bigger, better retail high streets. It’s all about managing the decline.”

Matthew Hopkinson, Director, Local Data Company is rather more cautious: “Many areas are over-supplied with shops, especially in some of the northern industrial towns. The vacant units need to be taken out of stock; some could become residential but in poor or depressed areas why would people want to buy them?”

Professor Bamfield also believes the residential option may be suitable for some:

“Vacancy rates in our high streets could sour if many of the 25-year leases coming up for renewal are not renewed”

“High streets in traditional market towns were once a mix of houses and shops and many contain attractive properties that could be reconverted back to houses,” he says, “but that certainly isn’t true of every high street. Many of those shopping parades built in the ‘50s and ‘60s are a real mess. Units are often small, with inadequate IT and poor access to the back door and serious remodelling will be needed over the next 10 years.”

In many areas, argues Professor Bamfield, small shops, inappropriate for 21st century omnichannel trading, will need to be enlarged – typically by converting five outlets into three – but with fragmented ownership in many areas co-ordinating that sort of development will not always be easy. Local authorities remain significant landlords in some high streets, leading some to suggest that bringing many of those services which were once found there – such as public libraries, job centres, schools, police stations, council offices or doctors’ surgeries – back into high streets could both encourage footfall and create a greater sense of community.

Practical help in the form of major changes to the business rating structure, simplified change of use rules, or even local sales taxes used to support high streets could all help. “The Government seems interested in the high street but they don’t really have a great policy,” says Professor Bamfield. “They don’t understand retailing. Matthew Hopkinson agrees: “There have been some Government initiatives but it needs investment and no-one is really looking at what is happening at a local level. For example, if a successful independent owns their shop but the area is in decline who will help them move? What happens to poor areas where the conversion to residential option really isn’t viable? There has to be a top-down initiative.”

For those 30% of high streets that “could go either way” change will certainly be essential. “High streets in future will be less homogenous,” says Natalie Berg, Global Research Director at Planet Retail. “There needs to be food, drink, leisure, community rooms – somewhere for yoga or wine tasting – and independents to give excitement.” She suggests “marketplace” outlets providing a high street presence for the sort of small businesses and start-ups that currently sell via online marketplaces like Amazon.

While independents and community groups may be the mainstay of tomorrow’s high streets, national brands could become few and far between as the big chains reduce their

estates: "Instead of 200 outlets across the country some are starting to opt for 50 or 100 in strategic locations with other areas served by online sales," says Professor Bamfield. Perhaps a decisive factor in the coming 18 months will be the very large number of 25-year leases taken out in 1990, when prices were low, which come up for renewal next year. If many of these, as forecasters predict, are not renewed then the vacancy rates in our high streets could soar.

Consultant Claire Rayner organiser of the recent "Future High Street Summit" believes that fundamental changes are needed. "One of the key points that emerged from the conference was that we have to move away from the idea of the high street being primarily a transactional retail centre. It needs to become more of a community hub with services, hospitality, entertainment and social activities – and it needs to adopt very different trading hours. Springboard presented some research at the conference which showed that while high street footfall had fallen 26% since 2007 during traditional retail trading hours, it had actually increased significantly between 5pm and 8pm – which is when most retailers have shut up shop for the day."

CHALLENGING DYNAMICS

According to Matthew Hopkinson around two-thirds of high street shops are currently independents. In the past many of our most successful retail companies started from a single outlet in their local town and experimental start-ups have always brought variety and excitement to the retail mix – but independents may also find changing consumer dynamics challenging: "They need to open in the evenings and on Sundays," says Claire Rayner, "but many say they like 'family time' so they don't. I'm sorry but if that is their

attitude they shouldn't be in retailing – not only is it the wrong approach but they'll miss 20% of their sales." Retailers, she adds, need to go where they are relevant or adapt to match changing consumer demand. "If they do neither then they'll die."

The Government backed "town teams" are supported by the Association of Town and City Management which offers a raft of ideas and supporting materials to raise the profile of the high street, although judging from some of their questionnaires they appear to be targeting already reasonably successful shopping streets with little mention of the discounters, pound shops, gaming outlets or credit unions that can dominate more challenged areas.

While many high streets are in serious decline, they often still serve a local community – and could have an even greater potential market if parts were returned to residential use. "We also have an ageing population," says Matthew Hopkinson, "and many will want to shop locally, especially if they no longer drive, so there is a case for supporting local high streets to provide essential shopping."

Tony Stockil has referred to the local pharmacist as "the last man standing" – an outlet serving essential needs which can often be found on even the most depressed high streets. Add the current tendency for supermarkets to focus on convenience stores, the need for centralised collection points or locker units for online orders, some local authority services and a fair sprinkling of coffee shops or restaurants and smaller, mixed-use high streets – even in the more depressed parts of the country – could survive as community hubs. The national chains may have deserted them but such streets could well provide the proving ground for tomorrow's retail success stories. 🇬🇧

“High street footfall has fallen 26% since 2007 during traditional retail trading hours but increased significantly between 5pm and 8pm”



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Retail challenges: is technology both cause and solution?

Technology undoubtedly continues to pose numerous challenges, but can it also enable retailers to properly realise the true advantages that digital can offer?

David Smith at GS1 UK investigates.

OVER THE past decade or so the relationship between ecommerce and high street retail has often been regarded as unbalanced, with the perceived competitive advantages available to online retailers commonly drawing accusations of them 'killing' the high street.

However, while there have been many changes to our high streets and shop vacancy rates continue to hover around the 20% mark, they have not been ousted from the retail experience by the web; rather they remain an integral part of the shopping journey for many.

Now that technology is evolving to enable the potential for highly relevant and personalised digital experiences in-store, attitudes in general regarding online have tended to shift toward a more positive slant. The average shopper, however, has long anticipated that highly consistent and seamless experiences, irrespective of channel or device, should be standard - easy to say perhaps, but getting all systems, infrastructure and processes linked in a way that is truly supportive of an omnichannel proposition is a highly complex challenge in reality.

Technology undoubtedly continues to pose numerous challenges, but can it also enable retailers to properly realise the true advantages that digital can offer?

THE MODERN CUSTOMER

To answer this question, we need to understand the modern customer - GS1 UK recently surveyed 2,000 people to help understand their attitude toward cross-channel shopping.

A few years ago it may have seemed to some that online shopping would almost entirely displace the traditional store, but consumers appear equally wedded to both formats. When asked which shopping experience they

preferred, 52% said online and 48% in-store. This close split may be testament to the fact that the borders between them are becoming blurred beyond recognition.

When asked the reasons for their preference, there were few surprises. For online, it was the conventional perception of greater convenience (86%), value (59%) and choice (49%). For those preferring in-store it was the opportunity to try before buying (80%), social experience (34%) and, interestingly, the fact it is easier to see special offers (30%).

Much has been written about the threats and opportunities of showrooming, but it is perhaps easy to misunderstand why it is happening when considered in isolation from other behaviours. When asked if they had ever researched a product offline and purchased it online, 71% said that they had. This could be interpreted as evidence of the scale of the threat, but a further 80% said they had researched a product online and purchased it offline.

What this actually suggests is that showrooming is simply a small expression of the overall cross-channel shopping experience that many consumers engage in as standard. Technology has invited consumers to use multiple channels, and they have responded.

As these figures reveal, there is no single solution that will satisfy every customer; a range of available options for engagement and fulfilment are often needed to meet the requirements of an individual's circumstances and preferences. One of the major themes in multichannel fulfilment at present for example is click and collect. This option may be growing in popularity, but the survey found that 75% were not disappointed if a retailer did not offer it. Clearly, its availability will be useful in some contexts but it still only represents one part of the cross-channel experience.

PRODUCT INFORMATION – A NEW BATTLEGROUND EMERGING?

Many retailers now aspire to be omnichannel, largely because their customers exhibit so much cross-channel behaviour. Yet so much about the quality of the experience depends on the relevance, consistency and accuracy of information provided, and delivering on the promise of the kind of omnichannel experience the modern customer demands across all platform and channels is a complex process.

Failing to deliver on this is soon exposed, and quickly drives potential customers away from purchase decisions. 42% of respondents to our survey said they had given-up on an online purchase due to a lack of information about the product, while a further 24% said that they do not trust that the product information provided online is as accurate as that available in-store.

Credibility is so important to an online merchant, and inaccurate or incomplete information can have a serious impact on that merchant's ability to sell. Almost 50% of respondents said they had given up on an online purchase because they did not trust the seller.

As shopping journeys become ever-more complex and technology continues to develop all manner of new devices, networks and touch-points, we are seeing the integrity of product information begin to emerge as a key differentiator for brands.

OMNICHANNEL-READY DATA

One of the major issues preventing the roll-out of successful omnichannel strategies concerns the very thing that is driving the need for them; the technology is developing at such a rate at present that new devices, platforms and networks enter the market every year and begin competing for consumer attention.

The one certainty is that consumers will continue to utilise the full range of options available to them in an integrated manner.

Irrespective of where technology is taking us, there will always be a requirement to identify, provide information on, and transfer physical goods through increasingly complex supply chains and to satisfy the increasingly complex relationship with the end user across this proliferation of touch-points.

Keeping on top of this successfully can appear a daunting and costly prospect at times but while technology poses the challenges, it

GS1 UK AND THE BAR CODE

For more than 35 years, GS1 UK has been working with its members to enable the efficient movement of goods and sharing of information. Having introduced the first truly global bar code numbering system in 1973, at least five billion GS1-compliant bar codes are now scanned everyday – making it the most widely used supply chain standards system in the world. GS1 identification numbers are now also commonly used in RFID tags, Electronic Data Interchange (EDI) messages and for real-time global data exchange.

can also offer its own solutions.

It's something that we take for granted now, but 40 years ago the introduction of bar codes into retail was a technological revolution, enabling far greater efficiency for businesses and their supply chains.


It was a landmark moment for the retail industry, and we are at the threshold of another major shift now, which will see the roll-out of new product identification standards to support the linking of wide ranges of disparate digital datasets through use of structured data.

Examples of the types of datasets that might be linked and made accessible to consumers include detailed information on product attributes, local stock levels and supply chain traceability as well as user-generated content.

Consumers want to have access to accurate and detailed data in real time, and through all touchpoints where engagement occurs. Through the embedding of data-linking identifiers within structured data, these standards will help enable the kind of high quality, omnichannel experiences that customers increasingly demand.

It may seem that we live in a highly technical age, but in reality the full impact of digital is only just starting to be realised. Once the Internet of Things becomes fully integrated into our daily activities, we will be in an entirely new phase of digital, in which there will be little meaning to the term 'offline' – and retailers will need to adapt to the associated challenges.

But every challenge also brings opportunities, however quickly they may arrive, and the way that digital enables brands to get closer to their customers than ever before clearly offers fantastic potential for strengthening relationships.

The success of these relationships will be determined by the quality of the experience on offer, alongside the reliability and depth of the supporting information available, wherever and whenever that customer should choose to engage. 

We are at the threshold of a major shift which will see the roll-out of new product identification standards to support the linking of wide ranges of disparate digital datasets through use of structured data

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INNOVATIONS

Delivering the future

Equipping the omnichannel sales assistant

Shoppers are happy researching online, looking at product data, images, video, zooming in and out, swapping between channels to research their purchase before making the final decision. Sometimes though the personal touch is needed or some extra information that PIM, FAQs or customer reviews can't answer. *Emma Herrod* investigates.

FOR ONLINE customers, chat online is nothing new. With the click of a button a messaging box appears linking the shopper to a free agent in the call centre or a store. Fashion retailers such as Baukjen offer advice via video link with a personal shopper. Other ecommerce sites offer help automatically as a pop up if a shopper is spending a certain amount of time looking at a product or if it is above a certain value threshold.

In April, two boutiques went live on a new platform from Avenue Imperial which offers a walkthrough of the physical store online. Avenue Imperial uses high-definition panoramic photography to create a virtual store which closely resembles the retailer's physical store and integrate fully with retailers' existing ecommerce platform.

Avenue Imperial tries to replicate the store experience online in a way that's distinctive from other ecommerce sites since "a store is much more than a product catalogue," explains Avenue Imperial's CEO Nick Rossi. "The idea was to take the real world shopping experience and bring it online," he says.

It also brings a new dimension to the chat and clientelling experience since it includes a facility whereby shoppers can connect directly with a store associate in the physical store to request further information or obtain advice. When a shopper requests further information on a product from The Corner in Berlin – one of the retailers using the platform – a sales assistant is notified on their iPad so that they can deal with the request. Using the SnapChat functionality, the sales assistant can take further product photographs with their iPad and share them with the shopper or add additional product to the interface in a way synonymous with a personal shopper.

"Thus availability of the store assistant becomes a key part of the site," says Rossi, so this aspect of the platform is more suitable for



the luxury sector, smaller boutiques or galleries rather than high throughput stores such as Zara or TopShop. “They could always use it as premium service or personal shopping service though,” he comments.

Another retailer linking the channels with personal shopping is Harvey Nichols. Its new website includes a ‘click to try’ service allowing customers to buy an item online and try it on in store with a stylist over a glass of champagne.

OMNICHANNEL

It is in the context of omnichannel and the rise of the use of digital technologies in store that clientelling is coming to its own. Marks & Spencer, New Look and Waitrose are all retailers recently introducing iPads in store for staff use. At M&S’s Kalverstraat concept store in the Netherlands three dedicated style advisors were equipped with iPads to help customers in its e-boutique and in the UK 1,500 iPads are being used by staff in stores to help customers order items not available in store for delivery to their home or for pick up in store.

M&S Multichannel Director, Laura Wade-Gery told delegates at the Internet Retailing Conference that she has been “impressed by store colleagues” who have embraced the iPads. During 2013, staff took all of the iPads into the school wear department to make sure that customers had their entire school uniform requirements before leaving the store. Some “40% of school wear orders were taken through the digital platform with many orders placed in store,” she said.

Across the retail industry, many store associates believe that they would sell more if they were provided with technology such as iPads or other personal tablet devices since, with an iPad in hand, they could provide a quicker, more valuable service to customers be that through providing additional product data, stock availability or finalising an order.

TECHNOLOGY

Some 85% of frontline retail staff surveyed by mobile retail solution supplier Red Ant said that sales would improve if employers provided them with better technology to serve customers on the shop floor. More than three quarter of Generation-Y shop workers aged 16 to 24 also say this technology would change the way they feel about going to work. Of this tech-savvy age group, which makes up almost a third of the UK’s entire workforce, 60% say they use mobile devices and apps every day and would be very

comfortable doing the same to assist customers at work.

Dan Mortimer, CEO of Red Ant comments: “These guys can’t remember a time before mobile devices and are more comfortable using them than anybody else in the entire business. But many retailers are failing to take advantage of this – there are plenty of devices being given out for work use higher up the chain, but not to those who can actually use them to make a real difference.”

Shoppers are going into stores with more information about a retailer’s products than the average sales assistant. They can access the website on their phone, check the online price and compare it to other retailers’ prices as well as check whether the product is in stock online or in the store. In the case of branded products they can also view the brand’s own website and any product data available there.

Shop assistants, therefore need to have access to at least as much data as the customer and be trained with techniques for helping shoppers with anything from more product information than is written on a product package, through to range comparison, price matching and information on a customer’s previous purchases or preferences. Tablets in store are not just a tool with functionality to close the sale, although doing so without having to move away from the customer to a checkout desk has its benefits in terms of convenience, service and speed.

“You have to make sure that the knowledge the store staff have is as good as what customers can access,” says Colin Temple, Managing Director, Schuh. They need to have access to technology and stock systems, he explains, so that if an item is out of stock they can still help the customer through ordering it for home or store delivery or reserving it for them at a store 10 minutes down the road which does have stock. “Seeing technology in store can reassure customers,” he says.

Schuh is currently trialling hand held payments and wearable technology in store that will also update stock files in real time so that sales assistants can help customers and take payments without having to go to a checkout. While it’s taking queues away from a checkout area it does also have its drawbacks explains Temple. “The practicality is that carrier bags and receipts are also kept there,” he says, “so we either need to retrofit a place to put carrier bags and print receipts – or email them to customers”.

There is also an issue that iPads in store can break or be stolen and it’s also an expensive ►

“Laura Wade-Gery has been impressed by store colleagues who have embraced iPads in store”

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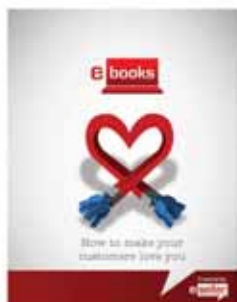
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technology. Retailers need to measure and weigh up how much quicker they make the service and that a level of customer delight is achieved to ensure that they return to buy again. “Are you better off spending the money on a new store?” asks Temple.

Homebase has seen a 20% sales uplift in stores that have undergone a refit including the introduction of extra staff to help customers and technology in the form of iPads for staff, Wifi and inspirational touch screen tools in the decorating centre and garden sections of the store. It is through this offering of advice, inspiring and helping customers, that Homebase is moving forward with its cross-channel proposition. “In the past it was difficult to have people in store with all the answers,” says Homebase Managing Director Paul Loft. This meant that when, for example, a customer wanted to compare products such as paint strippers, some staff would know the answer while others would have to look at the packaging. More help and advice is where digital is able to help staff help customers.

In the same way that a slow loading speed is cited as a reason for customers to abandon a purchase online, the same is true for shoppers in store who may abandon a basket if the queue at checkout is too long or too slow or if there isn't a sales assistant free to help them. So, as well as enabling sales staff with technology they also need to have time available to help customers and this is where Homebase has realised that extra staff are required with the main responsibility being to help customers in the inspirational decorating centre.

TIME


Ticketing systems have long been used by delicatessen counters in supermarkets to serve customers in order and Clarks runs a similar approach with paper tickets in the children's department of its shoe shops to help manage queues during busy periods. It has now supplemented the paper ticketing service with individual appointments which can be booked online, in store, over the phone with the

“85% of frontline retail staff believe that they would sell more if they were provided with technology such as iPads”

chosen store or via a dedicated appointments helpline. The live appointment system is fully integrated across stores and website so that parents and carers can reduce the friction of the summer holiday school shoe buying experience by creating, booking, cancelling or re-booking appointments. Email and text message reminders are then sent by Clarks.

With knowledge of a customer's prior purchasing and browsing behaviour an appointment can be a more powerful tool than the customer walking in from the street. For example, the Clarks assistant could know the shoe style my son wears, the size last purchased and be able to gauge an approximate size needed now to ensure that they are in stock whether I've reserved them or not. They will also know what level of promotion is needed to make me purchase in other departments or what information is needed to create a fuller profile for marketing segmentation while they have an opportunity to ask.

Clientelling need not stop once the order has been placed though. In Russia, where Cash on Delivery is prevalent, shoe into fashion retailer Lamoda has combined delivery, returns and store assistant into one role with its personal courier service, Lamoda Express. When an order is delivered to the customer, the Lamoda-uniformed courier will wait for 15 minutes while the customer tries the items on, then take payment for what is being kept and take away any part of the order that is to be returned. The differentiator in this CoD market is that the 'courier' is more than a delivery person and is able to offer fashion and sizing advice.

When a shopper is talking direct to a sales assistant either online or in store they are already a certain way along the journey to making a purchase. How much more powerful are fully engaged store staff enabled to be the best that they can be with the right information, training and technology than a disenfranchised assistant with a customer who knows more about the product than they do. Knowledge is powerful but it can be combined with insight and brand advocacy in any and every location. 



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The importance of space and location

James Brown, Head of European Retail Research at JLL, examines the changing space and location requirements by retailers for stores and distribution as predictions say that 20% of total stock is likely to become surplus to requirements.



OVER THE last decade retailers have, to a certain extent, continued to do what they do best: sourcing new or 'better' goods, delivering these to store with ever more efficient logistics, driving down operating costs wherever possible, as well as finding customers and endeavouring to keep them happy.

However, we have started to see a shift in the way that both retailers and shopping centre owners and managers operate. Attracting and retaining customers now requires a degree of 'thinking outside the box', whether via new

technologies to ensure stock is always available in store, or by improving the customer connection or experience.

Innovation in shopping centres now means leisure and catering outlets sitting next to retail in most new build property – perhaps at the heart of a retail place. The catering offer in particular has gone from strength to strength (Westfield Shopping Centre provides a good example of this), with new shopping centres as well as some high streets starting to become places where customers happen to shop because they are already out and about, rather

than because they have gone there purely to shop in the first place. That said, on the whole the picture is fragmented: there are still very few large 'destination' attractions in Europe's shopping centres, and this is largely due to the cost of space, exacerbated by the lack of long-term guarantee of income security.

Within London, international retailer demand for the right space in the right location has fuelled record rents in the city centre, and the capital continues to benefit from its sought-after position as a prime global destination for those retailers looking for a platform to expand further into Europe. In fact, rents in more than a third (39%) of the top 200 UK retail locations (including London) are at, or exceed, pre-crash levels in 2008. Some areas, described as 'pockets of gold' – such as Oxford, Bath, Brighton, Colchester, Winchester and Edinburgh – have strong fundamentals and constrained supply and are seeing focused demand from retail and food and beverage operators looking to make the most of these conditions.

The last decade has also witnessed a growth in the number of UK retailers increasing their cross-border expansions in Europe, and consumers are also much more likely to make cross-border purchases than they were a decade ago. According to the European Commission, a quarter of EU consumers made at least one cross-border purchase during 2009, and this is likely to increase as more and more people travel to different locations. Consumers have begun to expect to see familiar brands regardless of where they are. Retailers are, for the most part, successfully moving into new territories and there are a large number of global cities for retailers to exploit.

SHIFT UP & DOWN

Despite a clear on-going demand for desirable retail property, the general view is that most legacy UK retailers are likely to be looking to adapt and potentially reduce their physical space in the future, partly due to the demands of consumers increasingly shopping online, but also in response to economic conditions and with retailers looking to change their retail business models and distribution strategies accordingly. It is really important for modern retailers to build a strong and consistent brand – both online and in store – and to ensure both the physical and virtual space they occupy reflects this brand.

Interestingly, retailers will increasingly have to consider not only where they place


“International demand for the right space in the right location in London has fuelled record rents as the capital continues to benefit from its sought-after position as a prime global destination for retailers looking for a platform to expand further into Europe”

their stores, but also, in particular, how they effectively manage their back-end operations to adapt to multichannel requirements. For example, there may well be a requirement for the creation of new distribution centres with online pick-up points, dark stores servicing large areas, existing stores servicing direct retail, whilst also acting as distribution points for ecommerce operations. These developments are pushing up demand for quality logistics space; at least 25% of logistics space secured by retailers in 2011 (5.6 million sq. ft. of Grade A logistics space) was related directly to internet retail, according to JLL data.

Click and collect has implications on storage requirements as well, both for goods to be collected and to be returned.

It is estimated that up to 25% of existing UK retail sales will go online by 2020 and JLL believes that over time, up to 150 million square ft. of space across the UK (20% of total stock) is likely to be surplus to modern retailing needs in its current form. This means that there is a percentage of existing physical retail space which is currently obsolete across the UK in certain locations. While it might not mean that there is too much space in total, it is certainly the case that existing space is not optimised; in terms of how it is used or where it is located. That said, stores are not going anywhere and they will continue to play an important role in terms of marketing and showcasing the brand, developing and maintaining customer loyalty, delivering great service and perhaps most importantly, selling products. Not all retailers are looking to downsize; they are considering solutions that are 'fit for purpose' in this new increasingly virtual world.

At JLL, we are seeing some retailers walking away from underperforming locations, instead prioritising capital expenditure to build ecommerce platforms designed to bring online and in store retail together, or allocating capital to new store expansion, where economic fundamentals are attractive – ultimately this is good business practice. The plight of the high street has come under much scrutiny in recent months, and it must remain a priority, but the good news is that opportunities do exist, both online and physically.

It is important for businesses and government to work together to find solutions that support the changing form and function of UK shopping, as well as the evolving requirements of towns and cities more broadly. 

Convenience stories

M-payments are the talk of retail, but with so many technologies to choose from, what are going to be the winners? *Paul Skeldon* believes that it won't be a technology that wins, but convenience and engagement through payments.



THE LAUNCH recently of Paym heralded a raft of gushing news about how mobile payments are here and prompted the BBC to undertake the inevitable vox pop where white middle class middle-aged people said they didn't trust new fangled technology when it came to money, while the white middle class twenty-somethings all said it was no different to using a card. But Paym is not really the point when it comes to m-payments.

Paym is in fact a peer-to-peer payment tool that is designed to allow consumers to pay each other – such as when going Dutch for dinner – and is not really, for now, a way to pay for goods and services.

This confusion on behalf of the mainstream media is symptomatic of how no-one really understands what mobile payments is.

“Mobile payments were 66% higher in March”

Consequently, there are many different technologies, business models and options available to retailers and consumers – and no-one on either side of the fence knows what to pick.

Consumers are buying things through mobile. The latest figures across Europe, from payment provider Adyen, suggests that mobile web payments accounted for 20.1% of all payment transactions on international payment provider Adyen's network worldwide in March – more than 66% higher than March 2013. Of that 20.1%, smartphones accounted for 10.9% of all payment transactions while tablets generated 9.3% of total transactions.

“Now that the majority of merchants worldwide are engaging with consumers via the mobile web, the paradigm has shifted from, ‘Will people actually buy goods and

services with their mobile devices?’ to ‘Fact: mobile commerce is a vital sales channel for both merchants and consumers – and therefore deserves increased focus,” said Roelant Prins, Chief Commercial Officer at Adyen, which processed more than \$2.2bn in mobile payments in 2013.

Is this really mobile payments though: isn’t this just doing ecommerce on a mobile device? To many companies – not least payment gateway providers for ecommerce – this isn’t m-payments. This is just paying online with a different OS. True mobile payments is about using the phone as a conduit between the consumer’s bank account or a card and the merchant. This is where the real plays are happening right now and there is everything to play for.

The Centre for Economic and Business Research (Cebr) estimates that 20 million adults will use their mobiles to pay for goods and services by the end of the decade, with the value of purchases tripling from current levels to £14.2bn in 2018.

Yet the Cebr research doesn’t really suggest how this is going to come about.

The early money has always been on NFC – where the phone essentially acts like a contactless card. While this was written off early on, it is perhaps now starting to gain some credence.

In April 2014, monthly spending on contactless cards exceeded £100m for the first time, according to data from The UK Cards Association. Couple this with the news that 78 million NFC enabled SIM cards were shipped in 2013 globally and it might mean that consumers are nearly ready to make the NFC m-payments leap.

The SIMAlliance suggests that shipments of NFC SIMs rose by 159% to 78 million, with the biggest orders coming from Japan/Korea (37 million shipments). North America hit 24 million shipments. The number of SIMs still lags the number of NFC-enabled phones. Analyst IHS says NFC was in 275 million units in 2013, up 128% from 120 million in 2012.

WorldPay sees this as clear evidence that retailers have to now take NFC payments seriously: starting with cards, but ultimately leading to mobile NFC payments. WorldPay UK’s Chief Marketing Officer James Frost explains: “The UK Cards Association [data] simply reconfirms the surge we’ve already seen in consumer confidence – which has seen average sale size grow 27% in just two years. If you’re a business regularly taking

WAGAMAMA, PREZZO AND GBK: PIONEERING SIMPLE M-PAYMENTS

With more than 2,000 UK retailers signed up to its smartphone payment app, PayPal is to make shoppers lives easier by letting them order and pay ahead of time and a new ‘pay at table’ feature, both aimed at streamlining restaurant use.

Wagamama will be first to roll out its new Pay Ahead service to the public and Prezzo will be trialing Pay at Table.

With Pay Ahead, diners can choose and order their wagamama takeaway through the app, saving time when they collect it from one of the 107 wagamama restaurants.

Richard Tallboy, Director of Business Development at wagamama, explains: “Allowing customers to order ahead and pay for their take-out through the PayPal app makes the experience more convenient for our customers. Payment is already sorted so they just need to pick up their food and enjoy.”

Prezzo restaurants, meanwhile, will be rolling out Pay at Table, allowing diners to pay quickly and adding the option of splitting the bill with their friends, through their smartphones.

This feature is designed to save customers time by ensuring they do not have to wait for their waiter or waitress to bring the bill and a PIN machine to take payment.

Christian Poole, Marketing Director at Prezzo, says: “PayPal has helped us give customers the control to view, split and pay the bill directly on their mobile phone. We’ve increased our sales, customer insights and satisfaction.”

It doesn’t end there. PayPal is extending its ‘pay by face’ trial – where users pay using their PayPal profile – from selected Starbucks to 60 restaurants in the Gourmet Burger Kitchen (GBK) chain. The follows the success of paying by profile picture at GBK’s Richmond restaurant in 2013. GBK has integrated picture payment into its IBS EPoS system.

Katie McDermott, Marketing Director at Gourmet Burger Kitchen, says: “With counter service at GBK, the facility for customers to check in and pay with their PayPal profile picture has made the transaction faster and easier and we’ve got to know more of our customers by name.”

payments of £20 or less, contactless is a must. You can serve customers quicker, cut down queues and never miss a sale during peak times. That’s why we helped over 70 large retailers move to contactless last year.”

SIMPLER & FASTER

However, there is much work to be done on the retailer side. While Berg Insights has estimated that 53% of the world’s POS terminals will be NFC ready by 2017, there is still a long way to go.

While the NFC message might be starting to filter through, there is a growing groundswell that points to consumers wanting simple and faster ways to pay, and that this is really where the benefits of mobile payments lies.

A study into smartphone users’ attitudes towards mobile payments by integrated mobile solutions provider Oxygen8, has revealed – rather unsurprisingly – that simplicity is the driving factor to unlocking widespread adoption. Despite having the capability to do so, a third (33%) of 18-44 year olds in the UK admit to never having made a payment using their phone. However, ►



over half (56%) would be more encouraged to do so if it was as simple as paying with a single click.

The need for a more straightforward payment method is consistent throughout the research findings, with 56% of smartphone users surveyed admitting that multiple steps put them off making mobile payments. 55% also stated they would be more likely to make further payments using their smartphone if a simpler method was universally available.

"We live in an age where secure hassle free payments, such as contactless and 1-click online payments, are a given," says Maria Grant, Head of Product Development at Oxygen8 Group. "These findings show that consumers expect similar simplicity when it comes to mobile payments. Businesses, like ours, are able to provide this to merchants. But it's clear that the industry needs to work to create more awareness with consumers that simple, secure and swift smartphone payment options already exist."

The importance of consumers having access to the right mobile payment mechanism is amplified further by a third (33%) of those surveyed confessing they would like the

“There are many different technologies, business models and options available to retailers and consumers”

option to directly click through from an SMS marketing message advertising a product or service to pay for the goods. However, 73% have abandoned shopping baskets for reasons including fiddly navigation, security concerns, off-putting pop-up adverts or a clunky checkout process. Businesses will need to address these concerns if they want to capitalise on the consumer appetite for direct payments from SMS marketing.

And this is the real nub of what mobile payments has to offer: it has to offer speed and ease of use, but it also has to be part of the loyalty-engagement play by the retailer, encouraging repeat business and cutting cart abandonment. It is here that retailers should be looking when assessing what technology they should be investing in to make m-payments a reality.

"To exploit the opportunity to engage with consumers via the smartphone businesses need to make sure the whole process is simple and seamless, from a targeted SMS through to payment," concludes Grant. "If they can achieve this then it will create a direct way for them to build brand loyalty and increase sales." 🌈

The new world of 'boundary-less' commerce

THE WORLDS of online and offline retail are rapidly converging, with consumers expecting a seamless experience and consistent service regardless of where the transaction is occurring.

In the new boundary-less world of e-commerce, customers are no longer loyal to one retailer or brand, often using technology to compare the best deals and making purchasing decisions accordingly.

Increasingly retailers are operating multiple touch points with the ensuing challenge of how to integrate these touch points in a way that enables a clear view of the customer journey. With 50% of retailers admitting they are unaware of the journey a customer makes to purchase, this is a very real, and urgent, challenge.

Integration between channels allows retailers to provide the

seamless experience that customers increasingly expect. There are multiple challenges in implementing this integration, not least the constraints of legacy IT systems, which 50% of retailers believe make it more difficult to successfully carry out integration. Equally, half of retailers feel their budget constraints are preventing them from putting in place the processes needed to ensure a better customer experience.



Retailers are nonetheless well aware of the importance of investing in technology with 85% of retailers planning to invest in their website, 65% planning to expand their mobile channels and 59% stating that multichannel system replacement will be their top investment priority for 2014. The focus for retailers who are making changes to their systems should be on what they want to deliver to the customer, devising how they will make this happen rather than working out what they can do within the constraints of their current technology.

In order to approach this new world of business transformation and successfully execute the transition into boundary-less commerce, retailers will need to focus on the following to achieve agility:



- Ensuring a solid understanding of the problems that the retailer is facing by utilising available data.
- Establishing a governance framework that allows access to the right data at the right time.
- Encouraging the IT and business functions to work closely and form an agile team that reviews problems, creates solutions and agrees the overall business case for new and existing features.
- Continuously reviewing and updating the technology utilised to give the latest picture of the business and what is needed to keep on track.
- Working with suppliers to ensure there are no boundaries or obstacles in the service delivery.

The primary advantage of this approach is that it enables retailers to respond quickly to changing consumer dynamics, as well as increasing the predictability of execution in any business transformation. Retailers are able to simplify complex issues and improve efficiencies, allowing them to constantly innovate and differentiate themselves from their competitors.

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What's in-store for mobile?

With the death of the high street greatly exaggerated, *Paul Skeldon* takes a look at how mobile, beacons and other ecommerce tech is set to keep bricks and mortar alive and thriving for many years to come.

WHO SAID the high street was dead? By 2018 half of all European retail sales will still take place in a store, with the UK likely to see 70% of sales coming from the high street if research by, respectively, Forrester and O2 are to be believed. But behind this headline lies a sea change in how people shop. The web – both fixed and mobile – will be playing a massive role in this high street boom.

And vice versa.

It seems that rather than online killing the high street, the high street, online and mobile are all feeding off each other, creating a whole new experience around shopping that, overall, will see more being spent by consumers.

Forrester, in its European Cross-Channel Retail Sales Forecast, 2013 to 2018, reports that the proportion of cross-channel consumers – who buy in stores following online research at home, and/or research in the store using either a sales assistant's tablet computer or the customer's own smartphone – will increase in the future.

Indeed, by 2018, it predicts, some 44% of in-store sales will have been influenced by the internet. Already, it says, such cross-channel sales are more lucrative than online-only sales. For every €1 spent online, €5 is spent in-store following online research.

It calculates that cross-channel sales accounted for €539bn, or 31% of total European sales in 2013. By 2018, it says, they will increase to €920bn, 44% of total European retail sales.

Meanwhile, O2's Future of Retail report conducted in association with Conlumino, says that by 2020, three quarters of us will go to the high street for inspiration in the future – influencing 89% of all retail sales by that date. A high street presence will influence retail sales worth as much as £338.5bn a year by 2020. Without stores, online sales would fall by as much as £52bn.

Today, says the report, 89.3% of sales – worth £278.5bn a year – take place in UK stores, while 10.7% (£33.4bn) take place online. Added to that, the value of the store is boosted by orders worth £0.2bn made over mobile devices from a store, the £6.2bn in click and collect orders picked up from a store, and the £12.3bn of online orders inspired in the store. That adds up to store-related sales worth £297.9bn.

By 2020, the O2 report predicts, stores will account for 78.7% of sales (£286.6bn) and online for 21.3% (£77.6bn). But the value of the store is boosted to £338.5bn a year when a forecast £3bn of mobile-in-store sales, £24.1bn of store as online inspiration and £24.8bn of store as click and collect points are added in.

All of this means, says O2, that retailers must reshape their stores, introducing more social spaces where visitors will come for events while also shopping. At the same time, they must integrate offline and online shopping in ways that might include enabling shoppers to broadcast their in-store experiences through social media.

Having a bricks and mortar footprint is expensive and increasingly competitive, despite the obvious role it plays in brand building and customer service. How can you stand out from the crowd and use technology to drive people to your stores?

"Technology is breathing new life into the high street," says Feilim Mackle, Director of Sales and Service at O2. "With more and more people shopping on their smartphones and tablets, stores are no longer just about buying. They are becoming go-to destinations for social, inspiring and rewarding experiences that ultimately drive sales online."

EMBRACING TECHNOLOGY

"Retailers have to recognise that the high street store is here to stay but its role has fundamentally changed. As the distinction

The high street, online and mobile are all feeding off each other, creating a whole new experience around shopping



between digital and physical becomes increasingly outdated, the brands that truly embrace technology to create a seamless experience for all their customers, wherever they choose to shop, will ultimately win the greatest share of both sales and customer loyalty.”

One of the key technologies emerging right now are beacons. These Bluetooth-based services offer very local connectivity to phones and allow retailers to track what consumers are doing in stores and to give them access to information and indeed to get very specific offers pinged at them.

Whether consumers are up for this or not is a moot point. A US study by Chicago

based Opinion Lab found that, given the choice, 80% of consumers are likely to refuse to have their movements tracked in retail stores via their smartphones. Of the 1,042 people quizzed in mid-March, eight out of 10 consumers don't want to be tracked without giving their explicit consent and 64% will only permit tracking of what they do and where they go if they opt-in or sign up to participate in a programme – and ideally gain something.

Nearly a quarter of shoppers or 24% believe retailers shouldn't do any in-store tracking at all.

Even promises of a better shopping experience didn't change consumers' minds ►

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with 88% saying it wouldn't make any difference. This is a response that is directly contrary to the opt-out platform adopted by 11 mobile location analytics firms.

What might make a difference is if retailers provided some incentive for participating, like discounts or free products. A study here in the UK by eDigitalResearch suggests that 45% of smartphone owners would be 'very willing' or 'somewhat willing' for retailers to send messages to their smartphone, influencing what they buy and where – and making the idea of beacons curiously viable.

One retailer who thinks that they are the future is Ellandi, which owns several small shopping centres in southern England. It is piloting a beacons trial with beacon supplier TagPoints to see how consumers react to getting offers as they wander round the Swan Centre in Eastleigh in Hampshire.

"There's a real buzz within the retail industry about the potential of location-based technology to help engage with and market services to the public," explains Mark Robinson, Investment Director at Ellandi, owner of the Swan Centre. "It offers them the ability to connect with motivated customers and deliver filtered offers and discounts – based on location and proximity – directly to their mobile phones. Our merchants are now able to communicate directly with customers and positively influence their spending patterns without having to lift a finger."

So far the big issue has been in trying to get consumers to download the app needed to interact with the beacons, but this limited trial has had some success and Ellandi is hoping to mirror what has happened in the US at Macy's in New York.

The interesting thing about beacons is that not only does it supply a conduit to the shopper, it also gives the retailers vital data about movement and even shopping habits of the shoppers. This is where the hidden value in beacons lies.

VISUAL


If beacons aren't your thing then the world of visual search is also making its presence felt in driving consumers into high street stores, particularly in the world of fashion.

Adrian Moxley, CMO and co-founder of WeSEE, which provides visual search software, explains: "It can be difficult to find a particular style or discover a new brand with a keyword – either shoppers are

purposely looking for something new or it's hard to articulate a personal style with a couple of words. Retailers must move outside of purely text-based descriptions of items to help shoppers find what they're looking for. Younger generations of shoppers are much more visual in the way they use the web and are very mobilised particularly when it comes to shopping and sharing purchase ideas with friends. There are countless ways in which visual technology can be integrated into the purchase journey, for instance 'drag, drop and shop' and the incorporation of digital imagery into the purchase journey creates a sophisticated, multi-layered visual, social shopping experience."

According to WeSEE, these visual shoppers are interested in the latest shopping technologies, since three-quarters of 18-34 year-olds would like more visual technologies incorporated into online and mobile shopping. Some 45% of under 35s say they would like to be able to take a picture of an item with their mobile and be linked directly to a site to buy it. One in three (32%) would like to be able to upload a picture and be shown similar items, and a third (33%) of this demographic would like to be able to know where to buy high street versions of celeb outfits seen in images online.

The latest generation of visual tech that keeps the high street alive while drawing people into a store from all over the world has just gone live in London at trendy boutique Start London in Shoreditch. Working with tech company Avenue Imperial, it is offering high definition walk through technology that lets the shopper virtually walk around the store from anywhere in the world and click on things they want to buy. It is like the high street in reverse.

Nick Rossi, CEO of Avenue Imperial explains: "A store is much more than just a product catalogue and we want to bring the excitement of shopping back to consumers. Stores and brands put a huge amount of effort into product selection, the store layout, the display, and the expertise of their staff. Using Avenue Imperial, customers can now benefit from all of that from the comfort of their own homes. From initial feedback we can see how fresh and immersive Avenue Imperial makes online shopping compared to the flat catalogue style ecommerce we have all got used to over the past 20 years." 

By 2018, 44% of in-store sales will have been influenced by the internet

Insight around the world



ISABELLE SALLARD, EDITOR, INTERNET RETAILING.FR

Interest in m-commerce continues to amplify in France. In three years, sales on mobiles and tablets were multiplied by 5.5, reaching 11 per cent of retailers' total online turnover in 2013 according to Fevad. As one of the most successful retailers in the mobile arena, vente-privee.com made 35% of its turnover through m-commerce. Therefore, the site has placed innovation at the heart of its business model.

In October 2013, vente-privee launched "Le Pass", a mobile app enabling brands to drive traffic into the stores. Last March, the retailer made another move by launching "Le Pass +", a device associated with the application to communicate with customers on their mobile, directly in stores. This new tool, based on geolocation, allows brands to customize messages to their customers upon entering the store and throughout their visit. They may also send offers, promotions or news on their mobiles.

Specifically, "Le Pass +" comes in the form of three Bluetooth boxes placed at the entrance of the store or the mall, on the shelves and checkout. The customer may, via the application, receive special offers, select the brands for which he wishes to be informed, earn rewards points, manage loyalty cards and get useful information.

"Today, we come to a second phase in the history of ecommerce, where the little "e" will disappear to make way for commerce. There is no more opposition between the real stores and online," said Jacques-Antoine Granjon, CEO and founder of vente-privee.com.

The Pass + solution has already been implemented in more than 1,500 French outlets including Henderson malls, Izac and Agatha stores.



YÜCEL YELKEN, CEO & FOUNDER, YSTATS

Turkey is among the world leaders in B2C ecommerce growth with sales in 2013 around 40% higher than the previous year. Growth rates are expected to remain close to this number for the next three years, according to yStats' publication 'Turkey B2C E-Commerce Report 2014'.

Growing internet and mobile penetration, developed logistics and high bank card use are driving the B2C ecommerce boom. Almost 50% of the population in Turkey use the internet and this online audience is one of the most engaged in Europe. Turkey's internet users are also the youngest in Europe. A quarter of all internet users shop online, with online shopper penetration among female internet users growing especially fast, although there are still more male online shoppers than female. Credit cards are by far the most used payment method in ecommerce transactions.

M-commerce has a high growth potential in Turkey with smartphone penetration of almost one-third on the total population in 2013. In the 18-24 year-old group, the smartphone penetration rate is over 50%. Around a quarter of online shoppers have used a mobile device to make a purchase online. Social commerce also has a solid ground for development in Turkey.

A growing trend is private sales, with private shopping clubs Markafoni.com and Trendyol.com, ranking among the top local ecommerce companies. Over the past three years, this sector proved to be one of the most attractive for investment, receiving millions of US dollars from local and foreign venture capitalists and ecommerce players. Consumer Electronics and Appliances was the largest product category in terms of sales, while Apparel has the highest reach of online shoppers.

The largest player on the Turkish market is online mass merchant Hepsiburada.com with a high one-digit market share. In 2013, its sales were growing by +50% compared to 2012. Other players, such as store-based and online retailer of electronics Teknosa and private shopping club Markafoni.com also saw their sales increase significantly, while local online food delivery company Yemeksepeti expanded to the Middle East under the Foodonlick brand.

The two most visited sites were automobile classifieds and marketplace Sahibinden.com and B2C/C2C auction and marketplace Gittigidiyor.com. Private shopping clubs Trendyol.com and Markafoni.com followed, with three online mass merchants Hepsiburada.com, Limango.com.tr and Morhipo.com ranking behind them.

**MICHELLE BEESON, ANALYST, FORRESTER**

By 2018, 44% (or €920bn) of all retail sales in Europe will be from cross-channel sales – sales completed in store following research online – up from 31% (€539bn) in 2013, according to Forrester's first European cross-retail sales forecast. In other words, for every €1 spent online, €5 will be spent in-store after research via digital touchpoints, reinforcing the need for excellence in cross-channel retail.

Northern European markets are driving cross-channel sales across Europe, with 72% of cross-channel sales coming from the UK, France, and Germany. By 2018, five categories – household appliances, toys, electronics, computers, and sports equipment – will have 54% and 73% of total sales coming from cross-channel sales. The growth of cross-channel sales emphasizes the importance of a digital presence for Europe's retailers, even if the final transaction isn't completed online.

Forrester's European cross-channel retail sales forecast is based on a variety of sources, including public financial documents, executive interviews, and Forrester's proprietary primary consumer research surveys. One recent Forrester survey of more than 13,000 consumers across seven European countries, highlights the fact that European online adults who have purchased products in the past three months use Amazon in much the same way and frequency as they would search engines to discover products online. This is particularly true in the UK and Germany, where it is the most popular research source, even above physical stores.

Additionally, consumers are adopting new connective technology to serve their day-to-day needs and increasingly expect that the information or services they seek will be available and accessible through their mobile devices at their moment of need. Thus, retailers must evaluate and understand the role digital plays throughout the customer life cycle, particularly as it aids and encourages discovery and consideration.

As the forecast demonstrates, there is a bigger opportunity if digital is evaluated as part of an end-to-end customer journey. The growth of cross-channel retail sales in Europe emphasizes the importance an organization's digital presence has on driving overall sales, not just those where the final transaction is completed online.

**LAURA TAN, STRATEGY DIRECTOR, BRAND UNION**

Taking the lead of other notable fashion brands, including Boden, Jack Wills and Topshop, Primark is skipping across the pond and launching its brand in the US. The expansion seems to represent a continuing trend toward the British 'fast fashion' model taking hold in the States, but it's not clear if Primark will be able to capitalize on American fascination with High Street high fashion.

Retailers such as Asos and Topshop led the way in introducing this model to the US successfully, learning from the missteps of such UK predecessors as Sainsbury's. The newfound success in British expansion is likely a good indicator that the trend is set to continue.

Historically, the US retail scene hasn't had as strong a High Street fashion presence as the UK. Stateside fashion has been focused either on mid-range, preppy classics such as Gap, J.Crew and Banana Republic; classic American labels including Coach and Ralph Lauren; or teenybopper boutiques like Forever 21.

In contrast, the British High Street prides itself on trend-led fashion at an affordable price. It seems, on the surface, that the British buyer is much more open to mixing designer style with low cost. In part, the mingling of High Street and high fashion is actually seen as a savvy option, allowing shoppers to bag great bargains.

Part of the Topshop success story, however, may have something to do with its US pricing strategy. Topshop raised its prices for the US market, feeding into its reputation for being highly desirable and trend-led, an approach that works in part due to the brand's lack of direct competition. On the other hand, Primark - known affectionately as 'Primarni' by its fans - is famous for providing catwalk knock offs at ridiculously low prices. Some of the brand's pieces have become instant sell-outs, as they are such good copies of designer items, but the quality of Primark's wares may create a barrier should the brand attempt to take on Topshop's premium approach.

Primark's future in the US will be dictated by the way it chooses to approach the American shopper. While it may win some easy points based on its European-roots, the retailer will have fierce competition from High Street-style fashion brands that have already cemented themselves in the market.

Highlights from the Internet Retailing Expo

Over 4,000 people visited Birmingham's NEC for the fourth annual Internet Retailing Expo in March to listen to presentations from retailers and visit 250 exhibitors. *Emma Herrod* pulls together some of the conference highlights.

THE INTERNET Retailing Expo 2014 saw a 26% increase in visitors and the event was abuzz with people doing non-stop business, asking questions of the retailers in the conferences and getting in depth with systems in supplier workshops.

Speakers in the conferences included Walter Blackwood, Director of Logistics at Mothercare and Sarah Baillie, Head of Multichannel Business Development at House of Fraser. Bertrand Bodson, Digital Director at Argos was keynote speaker in the Internet Retailing In Store conference.

THE RETAILERS

Bodson told delegates how Argos has developed its stores in the light of internet retailing. Features including Fast Track collection for online orders are now being piloted in six stores; to date, he said, the record time for collection was 22 seconds.





The digital concept stores have seen paper catalogues replaced with iPads in order to give customers “the same experience that they’ll have from their own digital devices”. They also give in store customers access to more product information such as videos and reviews. The experience can also be localised.

The long counters in store have been replaced by individual pods located in front of digital screens so that their use is more flexible and they can be swapped between standard pay and collection points or ‘Fast Track’. Digital media and product displays allow for localised merchandising and stock levels to be shown.

The Fast Track service allows customers to come into the store and leave quickly with their order. “The mission is to serve customers in less than 60 seconds,” Bodson told delegates. A feat of efficiency since 45% of Argos’ orders are made online with “90% of customers ending up in store.”

Speed is also an issue with stock movement and location said Bodson as he told delegates about the new ‘hub and spoke’ logistics operation which Argos is trialling in 60 stores. It enables a larger store to act as a distribution centre for 5 smaller stores so that customers can order an item that’s not in stock in a small store by 1pm and be able to collect it from there by 4pm. Alternatively, they can order by midnight and pick it up first thing in the morning.

Bodson wasn’t revealing any information on how the digital concept stores have

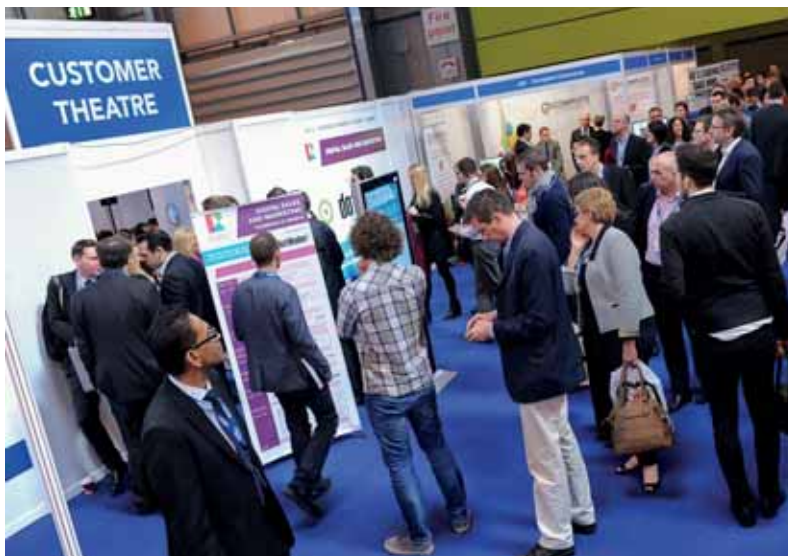
impacted sales but did emphasise that the digital stores are a trial, as is the partnership with eBay whereby customers of 50 merchants can collect their order from an Argos store. “I think more and more this is a direction of travel for us,” he said. “We’re on a journey but think it’s the right journey.”

House of Fraser’s Sarah Baillie assessed the way that stores are starting to become a key part of the multichannel mix, used to extend product range and to provide a collection point. Keeping less inventory in store “means you must have a very evolved delivery mechanism,” she told delegates.

Whole House of Fraser outlets were given over to digital shopping in Aberdeen and Liverpool, while its Edinburgh department store includes a Fifth Floor Online Store. The Edinburgh store within a store offers 1,300 more brands than previously and “its cutting edge design appeals to customers,” as its convenient and novel while increasing productivity of space and driving the number of customers to online explained Baillie.

Talking about store design, she quoted a Deloitte study saying that conversion rates increase by 9% when customers are assisted by employees with a high degree of product knowledge. Therefore, she believes that “technology-enabled staff are absolutely key,” as is a better use of shop windows so that they allow people to shop 24/7. “The winners will be those who make their stores work hardest,” she promised. ►

Over 4,000
people visited
IRX and its 250
exhibitors



The theme of next-generation stores continued with Doug Glenwright, General Manager for retail transformation at Tui Travel, who explained how different forms of digital media had been brought into the Thomson flagship next-generation store at Bluewater as the company looked to find new ways of inspiring shoppers. Screens in the store, he said, ranged from a large screen on the exterior wall, welcoming in shoppers, to smaller in-store iPads and self-service computers. The most-used screen by far, he said, was the large interactive map, three times more used than other elements. “Customers love maps,” said Glenwright. “What speaks more about travel?” Discussing the impact of the store, he said that in the last five months there had been only four holidays booked in-store using self-service computers alone. “Customers still want the one-on-one,” he said.

CUSTOMER EXPERIENCE IN 2016

Each of the conferences finished with a debate on the future of the topic and what it will look like in 2016. In the Customer Experience conference, Steve Wind-Mozley, Senior Vice President, Ecommerce, BBC Worldwide, Paul Wright, Head of Ecommerce, Fatface, Skip Fidura, Client Services Director, dotMailer and Lindsay Cassidy, Senior Technology Strategist, Rackspace debated the subject of ‘what new innovations should retailers focus on to drive customer experience in the omnichannel marketplace?’

“Shop staff should have no excuse for not knowing their customers,” said Steve Wind-Mozley in response to a question on how mobile and tablets will enhance the customer experience. For Skip Fidura mobile innovation will be through connecting the customer’s

“Internet
Retailing events
always draw
an impressive
quality of visitor”



mobile to the store. “Innovation is that you have the customer in your shop,” he told delegates. Paul Wright commented that speed and payments will be what enhances the customer experience along with iBeacons enabling data to be collected on dwell time, how customers walk through the store and what merchandise they’ve looked at. “Getting that information is very powerful,” he said.

When it comes to data, Lindsay Cassidy recommended retailers store all data. “Don’t lose it,” he warned “as you don’t know what you’ll do with it in the future.”

Looking ahead to Christmas they believe that if this Christmas was the mobile Christmas then next is around connected TV.

Meanwhile, in the Innovation Theatre, speakers included Alex Klose of IMI Mobile, who explained how retailers were integrating social and mobile to deliver customer service as well as loyalty programmes, and Marino Casucci, of Fact Finder, whose insights included the figure that 30% of stocked products are not found through in-site search.

For those who missed a presentation they’d like to have seen, presentations

from IRX 2014 are now online at www.internetretailingexpo.com.

THE EXHIBITION

Other expert retailers from John Lewis, Waitrose, French Connection and Homebase were amongst those who shared their expertise with visitors in the six conference theatres over the course of the two-day show, with many retailers bringing teams from the office to cover the different sessions and to visit the 250 exhibitors.


Chris Houghton, Head of Retail Logistics at the Shop Direct Group, who spoke in the Operations and Logistics conference at IRX, said: "IRX really covers the whole of the

game so it's nice to go and speak to people about personalisation, about web chat about internet marketing or emails, because that gives me a much broader understanding of the industry as a whole."

Peter Burn, Online Marketing Manager, Waitrose commented: "What always amazes me about IRX is there are always some new suppliers with some really interesting new technology. I really enjoy talking to them because potentially they could be the supplier that could help us to drive our ecommerce business in the future."

Don Bush, Vice President of Marketing at online fraud prevention business Kount, which exhibited at the event and also held workshops, said: "Internet Retailing events always draw an impressive quality of visitor owing to the superiority of the speakers and content of the show. This is the third year we've exhibited at IRX and we plan to sign up in 2015."

The 2015 show is set to be bigger still when IRX 2015 will see the launch of a brand new show, eDelivery Expo. eDelivery Expo will run alongside IRX to deliver a full educational programme with case studies from respected retailers in conferences and workshops. To find out more about IRX 2015 and the eDelivery Expo visit www.internetretailing.net and follow @etail to join the conversation.

In the meantime, the Internet Retailing team look forward to seeing you at the Internet Retailing Awards on 26 June. 





Internet Retailing

Expo 26 - 27 March 2014 NEC, Birmingham

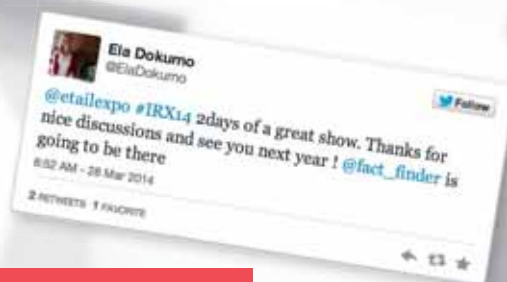
IRX: The Social Factor

Aaron O'Dowling-Keane, Site and Community Manager, InternetRetailing

1,500 tweets from 501 contributors over 3 days having a combined reach of 433,371 accounts.

"Thank you for making #IRX14 (the event and the hashtag) so great"

@etailexpo came into its own in 2014 as visitors, exhibitors and speakers engaged via the channel bringing the conversation to life around the event and indeed the world allowing global reach for those not able to attend.



Re-live presentations or catch the ones you missed on the post-event site:
<http://etail.li/IRX14>

Videos from the day are live on IRTV:
<http://etail.li/IRX14Videos>

Hear why people come to the show:
<http://etail.li/whattheysaid>

Discover our exhibitors gallery of fame #15secondsoffame:
<http://etail.li/15secsoffame>

Let us know your presentation highlights and speaker wish list for 2015 - join the conversation with #IRX15. Our handle @etailexpo will be live throughout the year as the conference develops and new exhibitors are added, but for continued industry insight and board level discussion follow @etail.



Internet Retailing connects people for success in our most social Expo to date



On the first day of IRX, Braintree hosted a workshop entitled 'Appealing to Convenience – simplifying payments for merchants and their customers'. Louise Knowler, Founder and CEO, Distinctive Wash was at the show looking to meet companies face to face that could help her with customer experience and mobile payments. At the workshop she loved what Braintree were offering in terms of convenience, enabling international sales and being mobile friendly.

Louise knew her customers were on mobile and that she had to be too. By the Easter bank holiday Braintree had their system implemented and were ready for action.

Visit Louise's site
DistinctiveWash.co.uk to
see what they've achieved
since the Expo



Just
because IRX
is over for another
year, doesn't mean
we have to lose
touch.



SHARE your event photos in our inner circle on Google+ and tag the friends and colleagues you find in our gallery.



CONTINUE to tweet us your thoughts and comments to @etailexpo for year round conversation.



JOIN over 32,000 like-minded members in our LinkedIn group, a great place to share your discussions and thoughts after a stimulating event.



DISCOVER #IRXfactor, where we gave exhibitors 15 seconds on Instagram video to tell us what they do for their #15secondsoffame. See the results on our website here and let us know if you have any favourites.

SEE YOU 25-26 March 2015 for the **5th annual Internet Retailing Expo** at the NEC, Birmingham.

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26 - 27 March 2014 NEC, Birmingham

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CUSTOMER EXPERIENCE AND JOURNEY



Increasing Sales Through Engaging The Customer At Every Touch-point On The Omni-channel Journey
Paul Loft, Managing Director



What Does Excellent Customer Experience Look Like At A Multichannel Retailer?
James Keegan, Director of Customer Services



Growing User Engagement And Maintaining It With Social
Ivan Lopez, Dad and CEO



The Death Of Advertising: How The Customer Became King
Peter Mühlmann, CEO



Creating A Consistent And Engaging Omni-Channel User Experience Across Multiple Global Sites
Paul Knutton, e-Commerce Manager



Tell us what you think about this conference #IRX_cx

As e-Commerce continues to quickly develop, this conference offered customer experience and journey strategies that will drive your loyalty and market share.

INTERNET RETAILING IN-STORE



As customer expectations grow for a more omnichannel experience this conference focused on merging digital commerce into the brick and mortar environment.



Using Technology Innovation To Enhance The Customer Experience In The Bricks And Mortar Environment
Bertrand Bodson, Digital Director



Omni-Channel Personalisation: Building A Strategic Roadmap For Cross-Channel Personalisation
Jane Dixon, Senior Consulting Manager, Client Excellence



A Leading UK Retailer Will Present A Case Study Of Their Digital Store Experiences To Date Allowing You To Benchmark Your Digital Store Strategy
Doug Glenwright, General Manager, Retail Transformation



Empowering Your Store Staff To Improve Customer Engagement And Sales In The Omni-Channel World
Richard Weaver, Ecommerce Director



Building A Click And Collect Strategy That Maximises Customer Convenience And Sales
Will Lockie, Programme Head - Multichannel



Tell us what you think about this conference #IRX_iris

INTERNATIONAL RETAILING



Key Questions For Expanding Your E-commerce Business Into New Countries
Dave Elston, Head of eCommerce



Overcoming The Three Main Stumbling Blocks When Crossing Borders
Phillip Smith, Country Manager UK



Around the World with The Doctor, The Stig and Sherlock: Addressing The Challenges Of Taking Consumer Brands To The Global Market
Steve Wind-Mozley, Senior Vice President, Ecommerce



Andrew Watson, Head of Online Marketing, Connect Distribution
Naveen Aricatt, LL.M, Auditor & Legal Counsel UK



Understanding How A Premium Brand Can Effectively Plan For Global Expansion
Ronald van Drunen, Global Director e-Commerce



Tell us what you think about this conference #IRX_int

As retailers struggle to find growth in the UK, this conference showed visitors how to exploit the huge opportunities the international marketplace offers the retailer.

OPERATIONS AND LOGISTICS



mothercare

Delivering Bottom Line Benefit Through Optimising Your Operations And Logistics Strategy Within A Multichannel Marketplace
Walter Blackwood, Director of Logistics

John Lewis

Ensuring Your Delivery Strategy Ensures Customer Satisfaction Whilst Still Offering You ROI
Mark Robinson, Director of Customer Delivery Operations

tryhugoboss

How Can Retail And Online Marketplaces Collaborate Efficiently From An Operations And Logistics Perspective?
Louis Agabani, Co-Founder

wnDirect

The Russian e-Commerce Market By The Carrier That's Still Shipping
Jonathan Matchett, Operations Director

SHOP DIRECT

Building An Efficient Online Returns Strategy
Chris Houghton, Head of Retail Logistics and James Harper, Head of Returns

Doddle

Doddle: An Innovation In Parcel Pick Up And Drop Off
Peter Loudon, Project Director



Tell us what you think about this conference #IRX_ops

As customers are becoming even more demanding for delivery on their own terms this conference helped visitors drive sales, manage stock and build customer satisfaction through effective operations and logistic strategies.

As technology becomes integrated into customer lives, this conference helped visitors to maximise turnover and customer engagement through new innovations in sales and marketing strategy.

DIGITAL SALES AND MARKETING



Sainsbury's

Building A Successful Multichannel Sales And Marketing Strategy
Jon Rudoe, Director of Online, Digital and Cross-Channel

dotMailer

The Best And Worst Of Email For e-Commerce: How Do Your Campaigns Measure Up?
Skip Fidura, Client Services Director

Waitrose

Walk Before You Can Run: Understanding How Back To Basics Sales & Marketing Integration Is Key To Your Ecommerce Sales Growth
Peter Burns, Ecommerce, Online & Digital Marketing Manager and Kirsty Rolle, Manager, Online Selling - e-Commerce

NBTY

Driving Online Sales Through Understanding What Motivates Your Customers
Jonathan Haywood, Senior Customer Insight Manager



Tell us what you think about this conference #IRX_digital

MOBILE AND MOBILITY

ZAPP

BrandAlley

Understanding What A Successful Mobile Strategy Should Look Like In 2014
Rob Feldmann, Chief Executive

facebook

The Importance Of Being Mobile: Putting Mobile At The Centre Of Your Marketing Strategy
Chris Porter, Head of Luxury and Apparel

TESCO

New Innovations In Mobile Marketing
Mark Cody, Senior Marketing Manager

ZAPP

Navigating Your Way Through Payment Technologies
Richard Newland, Commercial Director

Google

Refining Your Mobile Strategy Through A Deeper Understanding Of The Mobile Customer
John Gillan, Industry Retail Leader

DERENHAMS

Designing Customer-Centric Transactional Mobile Sites
Ashley Payne, Former Head of Digital Operations



Tell us what you think about this conference #IRX_mobile

As the mobile and tablet revolution continues to gather pace, this conference allowed visitors to build mobile strategies that will engage their customers and keep them spending.

Watch all presentations at www.internetretailingexpo.com

The Who's Who of IRX2014

26% more visitors to IRX2014 marked the fourth year of growth and we welcomed 4,161 multichannel professionals to the industry-leading Expo and conferences

IRX is where the industry meets, learns and grows, and IRX2014 brought over 200 exhibitors (a 25% increase on 2013) with over 4,000 professional visitors from 30 countries. IRX is the most important multichannel event in the retail calendar, and now extends with an international footprint. The event adds 6 retailer-led conferences and workshops, and we're proud that the average visit extends to over 6 hours, showing an extended engagement with suppliers, speakers and peers.

At a glance, IRX2014 delivered

- 202 exhibitor showcase stands, up 28 % on 2013
- 48% of our visitors have sole purchasing responsibility
- over 6 hours' visit duration on average
- 82% of visitors met their objectives by attending the show
- Over 30,000 visits a month review the exhibitor information and conference speaker videos on the dedicated website, www.internetretailingexpo.com.

IRX is the one place to learn about commercial leadership and success across the whole gamut of multichannel retail: from marketing and technology, logistics and customer facing design, mobile and instore experience - IRX is the industry event."

Our visitors said...



Peter Burn, Online Marketing Manager, Waitrose

"What always amazes me about IRX is there are always some new suppliers with some really interesting new technology. Potentially they could help us to drive our ecommerce business in the future."



Nick Humphries, givingabit.com

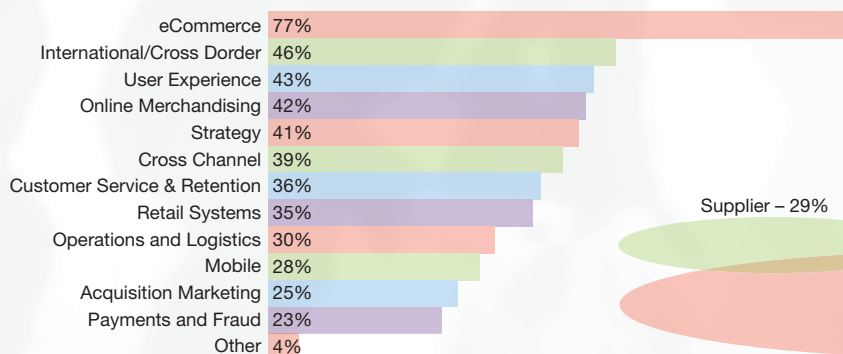
"IRX is a great place to come to gain ideas, to listen to great experience from great companies here. I'm going with a lot of ideas."



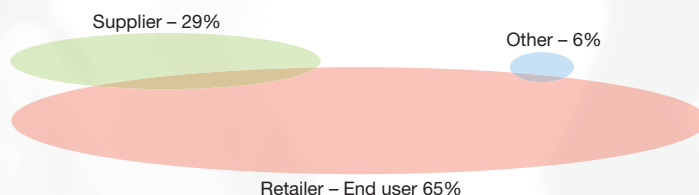
Louise Knowler, CEO and Founder, Distinctive Wash

"It's a very good opportunity rather than searching in the internet, to walk around and meet face to face solutions providers to enhance your business."

Our visitors' areas of interest



Visitor mix



For event information please see www.internetretailingexpo.com.

Exhibitor and sponsorship enquiries to Andy James 020 7933 8999 or email info@internetretailing.net

Visiting companies

Arcadia – Argos – Asda – ASOS – Aspen of Hereford Limited – B&Q – Barclaycard – Barclays – Barker and Stonehouse – Bensons for Beds – Bentalls – BodyPower Sports PLC – Boots – Bosch Communication Centre – Bravissimo – Brewers – British Telecom – Burton Snowboards – Carluccio's – Country House Outdoor – Drapers – Euro Car Parts – Forbidden Planet International – Fujitsu – Game Retail Ltd – Halfords – Hallmark Consumer Services – Harrods – Harvey Nichols – Home Retail Group – Jaguar Land Rover – Laura Ashley Holdings plc – Lloyds – Pharmacy – Makro Self-Service Wholesalers Ltd – Manchester United Merchandising Ltd – Marks and Spencer – Michelin – Tyre – Molton Brown – Moss Bros Group PLC – ODEON – Pernod Ricard UK – Philips Phones 4U – Poundland – Samsonite Europe – Sanderson – Snow+Rock Group – Specsavers – Telefonica – Tesco The British Library – The Carphone Warehouse – The Cashmere Centre Ltd – The Co-operative Group – The Fragrance Shop – The Mailbox – The RSPB – The Rug House Ltd – The Safe Shop Ltd – The Scout Association – Thomas Pink – Thompson Group – Thorntons – Travelodge – Triumph-Motorcycles Ltd – TSB Supply Chain Limited – TUI Travel Plc Unilever – Urban Outfitters – Virgin Media – Waitrose – Wilkinson – Wilko

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IRX is a great place to come
to gain ideas, to listen to
great experience from great
companies here. I'm going
with a lot of ideas.

Nick Humphries, givingabit.com



Are you a 'top' retailer?

Before measuring what it means to be a 'top' or 'best' retailer, you first must define what it means to be a retailer. *Emma Herrod* takes a look at IRDX – the InternetRetailing Top 500 Index.

W

ith over 250,000 retail businesses in the UK we can indeed be said to be a nation of shopkeepers – and indeed shoppers. This retailing capability, in one of the most competitive and demanding markets in the

world, has seen UK retailers extend globally, develop their channels and improve their offerings to connect repeatedly, profitably and at scale with their customers' wallets.

This capability does not stand alone, nor emerge fully-formed. Retail is a dynamic and richly-interconnected ecosystem of retailers, expert and knowledgeable suppliers, products, brands and talented people. At InternetRetailing we've been mapping these intersections since 2005 and have now launched IRDX – the InternetRetailing Top 500 Index – which:

- examines the dimensions of performance within multichannel retail;
- questions the extent to which these dimensions are leading indicators of success;
- extracts learnings and good practice insights;
- connects the capabilities of the suppliers and key staff within the Index.

At the recent Internet Retailing Expo, the first part of Index was launched, listing the Top 500 retailers – without rank – who will form the basis for our research into how we should rank them according to their multichannel capability and performance. But what criteria does one use for ranking those retailers whose footprint in the UK is the largest? And, more to the point, what does actually constitute a retailer in a world blurred by marketplaces, direct selling brands and B2B ecommerce businesses? The InternetRetailing definition for inclusion in our research is:

- **Destination.** The retailer has created a destination that in the minds of the customer is a source of product, service or experience. Whether this is a shop, a site, a place, a time or an event, it's the sense of 'locus';
- **Purpose.** The retailer has created goods and/or services for the purpose of selling, for consumption by the purchasing consumer;

■ **Merchandising.** The retailer 'sells' and is not just a portal for taking money. This means the selection, promotion and tailoring of retail offers for customers;

■ **Acquisition.** The retailer actively markets, recruits and attracts customers with a promise or proposition to the destination;

■ **Sale.** The retailer takes the customer's money – they own the transaction as the merchant of record;

■ **Recourse.** The retailer is responsible for the service, fulfilment and customer satisfaction flowing from the sale;

■ **Exception.** In every good list there's an exception, where we may include businesses within IRDX due to their influence upon retailers and retailers' customers, however they will not be ranked.

Having defined a retailer, what then makes a retailer 'top' or 'best'? It's relatively easy to determine the biggest by turnover, but that does not necessarily mean 'best'. What about profitability, reach, growth rate, potential?

What weighting do we give to the number of stores, channel capabilities, innovation, customer experience interface and design, mobile, operations and logistics, product and merchandising, social presence and activity? Is best a mixture of all measures?

Also, in our fast-changing industry we need to be alive to smaller, innovative and disruptive businesses who may have a great impact on the customer and set the context for established businesses.

Is Amazon top in the UK, or is it Apple, Argos, Asda, B&Q, Boots, Carphone Warehouse, Debenhams, Dixons Retail, Google Play, Homebase or House of Fraser? And what about IKEA, John Lewis, Marks & Spencer, New Look, Next, Sainsbury's, Screwfix, Shop Direct, Sports Direct, Tesco, Travis Perkins or Waitrose?

Following this report we will reveal in July the 2014 Procurement Guide which will showcase the suppliers to these 500. The culmination of the 2014 research will be the ranked Top500 list, unveiled at the ninth annual InternetRetailing Conference on 14 October.

Let us know your thoughts via research@internetretailing.net or of course via twitter @etail.

IRDX - DOWNLOAD NOW THE INTERNETRETAILING TOP 500 INDEX

at <http://etail.li/Top500Footprint> Don't miss out the full 2014 Footprint report outlining the criteria for measurement, the editors' view and the top 500. Let us know your thoughts via research@internetretailing.net or of course via twitter @etail.

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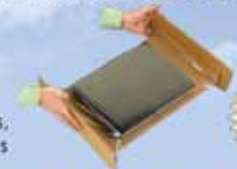
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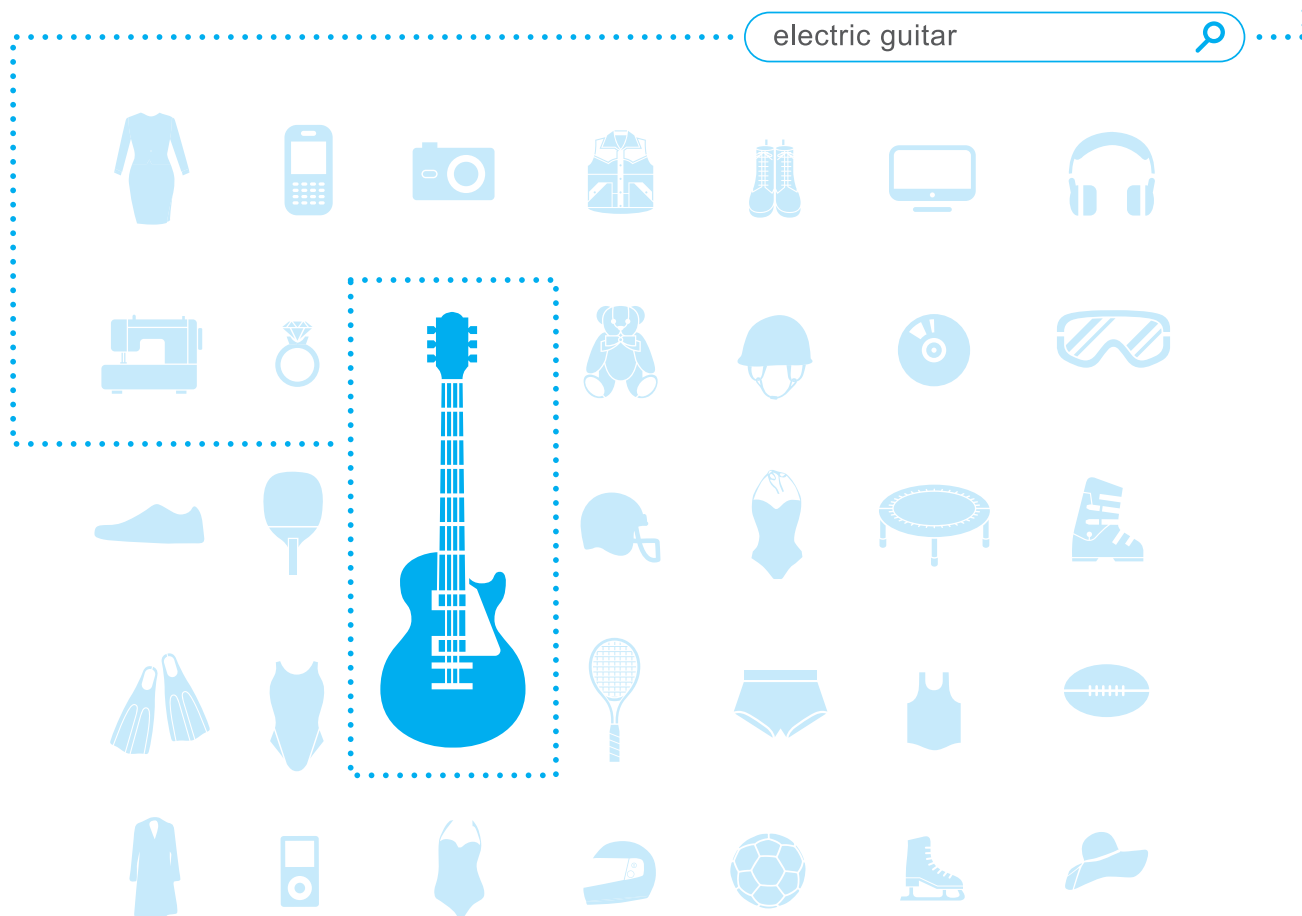
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