

SOUND AND VISION

Selling online without using a browser



INTRODUCTION: THE DEATH OF 'HTTP://'?

Tim Berners-Lee, widely credited as 'inventing' the internet as we know it, admitted recently in an interview that the '//' in today's URLs are superfluous, merely added as a flourish.



However, 30 years on from the creation of the URL – and along with it the web and the browser technology to help index and search it – perhaps the whole concept of the URL is also superfluous, to consumers at least.

Today we stand on the brink of a leap into a new era of the web: one where we don't need to remember URLs, or indeed, where we even have to use browsers to find what we want online.

For many of you reading this, browser-less interaction with the web is already a reality. If you have used Siri, Alexa, or Google Home then you have accessed the web without a browser. If you have used Amazon, eBay, or H&M's image recognition tools in their apps then, again, you have interacted with the web without a browser.

These are just the beginning of a world where soon we interact with the web in a wide variety of, more natural, ways. And with this change comes not only a shift in how we use the internet, but inevitably, how retailers market to and sell to consumers.

In this eBook, we take a look at how the web is shifting towards being 'browser-less', what is driving that change – from consumer habits, new devices and new technologies

– as well as how retailers can rise to the challenge.

While social media sites such as Instagram are also shifting how we view ecommerce – and, in a sense are also browserless – they are a story in of themselves. Instead, over the next few pages we shall delve into how voice and visual search, augmented and virtual reality – and combinations of all these technologies – are fundamentally changing how people interact with the web. We shall look at what is driving these changes, which technologies are making it happen and what it means for both retail marketing and retail craft.

We shall also take a look at how augmented and virtual reality (AR and VR) tools are also creating new retail experiences in-store that also demand a move to browser-less commerce on the High Street. And we shall investigate how changes brand communications with consumers are also going to see a shift to other ways of interacting outside the browser and app environments that are today's standard.

Is it the death of the URL and the browser? Probably not – yet, anyway – but it does mark the beginning of a fundamental shift in how we use the web. Yes, it is challenging, but it also opens up a wealth of new opportunities for marketers and retailers.

And it is a market that is already open, as we shall see. So, Alexa, read on...

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SPONSOR'S INTRODUCTION

Traditionally, retailers have attempted to replicate the role of the local shopkeeper in the online world. Knowing them by name, the kind of products they usually buy, their likes and dislikes, and when they buy certain items.

This has been a theme across online and mobile channels. Today's consumers are familiar with seeing product recommendations across the emails they receive – reminders to repurchase repeat products, as well as retailers using their data to enhance their experience with them.

With the rise of voice and visual commerce, retailers are moving from invading a customer's pocket with mobile and m-commerce, to entering their homes. Ensuring that they market to their customers responsibly is essential. As a lack of transparency with the data they collect, and the use of this data could be damaging.

Email can play a huge role in informing the customer of how the relationship will work at the start of the journey. Retailers can send an email once a consumer first uses the voice command, as an example. Lifecycle marketing will continue to play a vital part in the v-commerce post-purchase journey.

Visual commerce has the ability to help busy consumers explore the products they are looking for in a shorter period of time. Gone are the days where the customer will browse a site for the skirt they saw a lady on the tube wearing. Now, they can take a sneaky snap on their mobile - hopefully without getting a restraining order. Then, when it suits them, upload the image to a retailers' site and find similar items.

Retailers can take this one step further by recommending similar and complementary products. Opening the doors to increase the average order value and revenue of a customer.

AR and VR allows the customer to enter an immersive experience, so they can visualise how those items look on, and what they look in their homes. In the not too distant future, we'll see this experience embedded within the email and, maybe, the adoption of shopping within the email more widely adopted.

Ecommerce continues to evolve enabling retailers to connect with their customers in unique ways. Opening up the opportunities to break through the noise and into the lives of the customer.

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MEET THE BROWSER-LESS SHOPPERS

Over the past decade shopping habits have changed dramatically. While it took nearly two decades for online shopping to take hold in any meaningful way, it took just a further five years for mobile to change the stakes again.

Now, a further five years on and mobile has changed not only retail, but also the psychology of shoppers. It has made them much more demanding of retailers, wanting immediate gratification, massive choice and personalisation of experience, recommendation and service.

These fundamental changes, driven by mobile, are inextricably linked to the development and rise of browser-less commerce too. Voice controlled devices, such as Google Home and Amazon Echo, while inhabiting specific devices, also work on mobile apps. Alongside that, Apple's own 'voice assistant', Siri, was pioneered on iOS, the company's mobile operating system. Even Microsoft's Cortana works on mobile.

Meanwhile, image recognition technology has been pioneered on mobile apps: Amazon working with Snapchat, eBay with its own technology, ASOS and H&M with technologies built from the ground up by ViSenze, through to more recently Argos, Pinterest and more starting to offer the ability to search from images.

Again, this technology offers a browser-less on-ramp to the web, especially into retailer websites.

However, it doesn't end there. Increasing use of AR and VR services in shops, in kiosks and displays are also likely to offer a path to purchase that by-passes the browser in the traditional sense, while next generation messaging technologies such as Rich Communications Services (RCS) are likely to allow shoppers to purchase direct from rich marketing messages.

These technologies drive changing habits as much as they are driven by changing habits.

THE VOICE SHOPPERS

According to research by Simpson Carpenter¹, at current growth rates, by 2022 almost half of UK households are expected to own a smart speaker device, or voice assistant, increasing the potential voice-commerce (v-commerce) market from around £200 million today to £3.5 billion.

Amazon's Echo, in its various forms, currently leads the space. The ecommerce giant accounts for 41% of global smart speaker sales, followed by Google on 27%, giving it an edge in the race to bring consumers into its voice shopping ecosystem.

More impressively, the same research found that 50% of voice device owners liked their device, with 40% of those "loving" them.

What is unusual is that smart voice devices have rapidly entered the public consciousness and in a very short time are having a profound impact on how people use the web. The research finds one in three already own more than one smart voice device and 44% say the amount they use it had increased over time as they have mastered the commands and discovered more they can do with it.

Perhaps the biggest impact has been on other devices and attendant internet habits, with some 14% saying that owning a speaker meant they were able to use their laptop, PC and smartphone less.

How does this translate into shopping? According to Capgemini's Digital Transformation Institute², around a quarter

(24%) of shoppers would rather use a voice assistant than a website. However, in the next three years, this figure will rise to 40%. Close to a third — 31% to be precise – said they will prefer a voice assistant interaction to visiting a shop or a bank branch, compared to 20% today.

Voice assistant users are currently spending 3% of their total consumer expenditure via voice assistants, but this is expected to increase to 18% in the next three years, reducing share of physical stores (45%) and websites (37%).

Moreover, retailers and brands that provide the right kind of voice-based services will reap the rewards. Capgemini suggests that 37% of voice assistant users would share a positive experience with friends and family, and even 28% of current non-users would want to transact more frequently with a brand following a positive experience. This equates to serious potential financial gain, as consumers are willing to spend 5% more with a brand following a good experience with a voice assistant.

VISUAL SHOPPERS

While the whole world of voice commerce has received a lot of attention – mainly because it is backed by all the big names in digital and retail: Google, Amazon and Apple – shoppers are also turning to that other tool hardwired into the smartphone, the camera.

Visual search based on image recognition has come on leaps and bounds as artificial intelligence (AI) and machine learning have become ever more commoditised and affordable. And it has struck a chord with many Gen Z and Millennial shoppers.

According to research by AI company ViSenze³, which powers image recognition at

fast fashion pureplay ASOS, not only do 60% of younger shoppers exclusively use mobile for retail, two thirds (62%) said they would like to use visual search in order to find and identify products that they are inspired by on their mobile devices, before buying. And more than 70% said that if all digital content was shoppable, they would buy more online.

This is born out of this demographic's unique shopping habits, which are more propelled by social media and recommendation – from peers and influencers – than by traditional marketing channels.

Mobile retail software and app developer Poq is so convinced of the power of visual search that it has built it into its app platform⁴. It believes that, for retailers, visual search leads to higher engagement and 30% month-on-month user growth. It also assuages the consumer needs for instant gratification and makes finding exactly what they want straightforward.

AR AND VR SHOPPERS

While mobile commerce has provided much of the ability and impetus behind voice and visual browser-less commerce, it isn't the only game changer in town.

Increasingly, Augmented and Virtual Reality (AR and VR) are creating new ways for brands and retailers to engage with consumers – and in doing so are also pushing the idea of browser-less commerce.

Before we get into how, let's first outline what we mean. Augmented reality (AR) is where the user uses technology to overlay information from the digital world onto the real world. Virtual reality (VR), meanwhile, involved a more immersive experience

that the consumer is surrounded by that is entirely digital. Bringing the two together creates Mixed reality (MR), which is where retail interest tends to lie.

MR services are starting to gain ground, offering retailers the chance to offer up ways for shoppers to try on clothes, cosmetics and even to place white goods in their kitchens and furniture in their living rooms using this technology.

And the concept is already proving popular⁵. As many as 78% of UK shoppers want to use AR on their smartphones to assist with everything from basic tasks to social media to retail.

Despite being in its infancy, AR technology has enormous potential. AR is already enabling individuals to seamlessly project virtual images/objects through their smart devices onto the physical world. With such capabilities, AR is set to redefine the ways in which consumers intend to interact with brands.

Interested in AR, marketplace OnBuy.com analysed findings from Mindshare, which surveyed 1,000 UK smartphone users to see whether they preferred a handful of 'experiences' facilitated by AR via their own smartphone or through a pair of smart glasses.

OnBuy.com found that the majority of UK shoppers would prefer to experience aspects of social media communication enabled by AR effects (such as face filters, gifs *et al*) through their smartphones (87%) rather than smart glasses (13%).

While smartphone AR would conceivably offer a more traditional browser-based approach to convert this AR trial of merchandise into a sale, smart glasses, or other AR overlay technologies such as

smart changing room mirrors, would not – making them potentially another reason why browser-less commerce is likely to become popular.

THE SHOPPERS OF TOMORROW

While mobile has driven a lot of the changes in modern online and in-store retail craft, so has youth. And today's kids are going to bring a whole new dimension to retail that will drive the uptake of browser-less commerce.

While visual search is today being driven by Gen Z and millennials, voice commerce is going to more than likely to be the default of the generation that follows them. My kids, all under 11, already talk to Alexa to find out anything, control the TV and stream music. These people, in five years will be shoppers: they will drive browser-less commerce.

While this means more AR, more VR, more voice and more visual, it also means that new services, such as rich messaging, will prompt sales, while as yet unknown technologies on social media and beyond will also change the way they shop. Be prepared.

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WHAT TECH ARE THEY USING?

Shopping habits are shifting – and that change is being driven by technology. So, what technologies are we talking about specifically and what do they mean for browser-less commerce in the months and years ahead?

Already we have touched on how shopper habits are changing and which retailers are starting to adopt new technologies to meet that, but now we need to look more closely at the technologies in the shoppers hands that are going to fuel browser-less commerce.

VOICE COMMERCE

V-comm (voice commerce)¹ has become the buzzword *du jour* for many retailers, tapping in to the inexorable rise of the likes of Amazon Alexa, Google Home and even Apple's Siri (oh, go on then, also Microsoft's Cortana too). But what does it really mean?

In essence, v-comm involves creating 'apps' (called 'Skills' on Amazon and Google Home) that work on these voice controlled services that can interact with the web.

Typically, these devices are used by most consumers to play music, get the weather forecast, search for information and control smart home devices such as lights and central heating. They can also be used, in conjunction with services such as WhatsApp and Skype, to make calls².

But it is early days. These services are everyday simple examples of how to use these devices. Shopping is tipped to be the next big thing – and it is starting to happen.

For example, Tesco³ has a proto-skill that works with Alexa that allows shoppers to tell their device that they want to add bread to their Tesco online shopping list and it does.

HOW DOES VOICE COMMERCE WORK?

Let's buy some bread. Voice commerce relies on a series of advanced technologies to work: and it has become a commoditised service because processing power, network bandwidth and server space have all become cheap enough to make it efficient.

In essence, the device sitting in someone's home or on their phone or PC, is relatively simple: it is a microphone and some processing that can host the 'skills' that connect the device to the right services.

Firstly, asking "Alexa, can you put bread on my shopping list" will see the device fire up the Tesco shopping list skill and open a channel to that. The clever stuff all happens down the line in a server farm running Tesco's v-commerce services. The request for 'bread' to be 'added' to the 'list' is 'parsed' into its requisite sounds and that information is run through sophisticated speech recognition software to work out its meaning.

Once meaning – usually derived from keywords or phrases – is recognised, it is analysed using artificial intelligence (AI) to 'understand' what the request is. This information is then digitised and, ironically, then just uses the web to search the relevant site and add to the relevant list – in this case my Tesco shopping list.

In fact, it connects to the list online, looks at what bread the shopper usually buys and adds that on. Similarly, Alexa users can also buy things from Amazon by simply asking for it if they have a Prime account and are logged in.

On Google Home, Argos has launched Voice Shop⁴, where shoppers can use the Argos skill on Google Home to search for and reserve for collection some 20,000 goods from 850 stores across the UK.

VISUAL SEARCH AND ECOMMERCE

Visual search, using advanced image recognition to understand what something is and find similar, is a close cousin to speech recognition and is increasingly becoming a key tool for finding things online.

Unlike voice, visual search commerce is typically technology built into mobile apps that allow the shopper to point their camera on their smartphone at something, capture it and then use that image to search.

ASOS pioneered visual search in retail back in 2017⁵, building it into its app and slowly refining it over the past two years. The basis has been to allow shoppers to take pictures of things in magazines or on the street and find similar on ASOS to buy. It builds on the fact that ASOS's target audience is young and predominantly mobile – some 80% of UK traffic and 70% of orders, in fact.

Now in the UK, visual search is being used by ASOS, H&M, Zara, M&S, eBay and Amazon, to name but a few.

Amazon, however, has taken a different tack: it has partnered with photo-based social network SnapChat⁶ to make the social network's pictures shoppable, rather than adding to visual shopping to its own site.

AUGMENTED AND VIRTUAL REALITY

AR and VR are increasingly becoming on-ramps for shoppers, as retailers look at how to combine mobile technology and the internet to create new and interesting experiences.

In the online world, AR is being used to by retailers to help shoppers visualise what goods will look like in place in their homes or even what their glasses, or clothes will look like on.

These services overlay the items – scaled and sized and even correctly coloured – onto the real world as a means of helping online shoppers get that real world look and feel experience.

For example, in the run up to Black Friday in 2018, Amazon added AR to its app⁷, allowing shoppers to check selected products from all angles by tapping on the AR

HOW DOES VISUAL SEARCH WORK?

Like voice commerce, visual search has taken off because of commoditised and affordable AI technology. To process and 'recognise' an image requires a lot of processing power and machine learning algorithms. These are, as with voice recognition, much more widespread and affordable.

So how does it work? While, the technologies used differ from retailer to retailer, essentially they take an image and pass it on to a server farm, where algos go to work. These assess the shape, colour and other attributes of the image and match it with similar attributes of items in a database to find the best match.

The interesting thing is that the algorithms learn as they go what to look for and how to match it and so, in theory at least, get better and better at finding what the shopper is looking for.

View option available in the camera icon in the app search bar. They can even spin things round through 360-degrees using just one finger. With big ticket FMCG and white goods, they can also be placed in situ in the AR overlay to see what they look like and, more importantly, to see if they fit.

Similarly, Domino's Pizza also added AR in the run up to Christmas so that hungry consumers could view what their pizza would look like on the table when they were ordering – more of an appetite whetting bit of fun, but interesting nonetheless.

Right now, these services are part of existing websites or apps, so not technically browser-less commerce, but as their adoption increases they will become instantly shoppable from the image, bypassing the browser.

In-store the story is likely to be different. Adding AR and VR 'virtual fitting rooms' is going to be key to revamping the High Street experience and this is perhaps where the browser-less AR angle comes into play.

Smart mirrors that let shoppers see what clothes would look like on, without having to try them, and through which they can then buy are starting to see some traction.

Mastercard, for instance, introduced such

a mirror, with built in payments in 2017⁸. The interactive touch-screen OAK mirror allows shoppers to change lighting, language, view and request different sizes and colours as well as asking for specific items to be brought to the room via a 'request button' on the mirror. The mirror can be synchronised with a store's clothing catalogue and inventory system to offer intelligent product recommendations around the shopper's choice.

Shoppers who want to pay without queuing can use Masterpass or a dedicated mobile app. The smart mirror also allows clientele to avoid the checkout process altogether by paying seamlessly and instantly using Masterpass on the mirror or via the dedicated Masterpass app.

Other retailers are trialling similar services that should allow shoppers to try more than the store can stock then buy it online. It is early days, but this is in play.

RICH MESSAGES

Another area of particular interest to retail marketers is how to get shoppers shopping direct from marketing messages. To date, email and even SMS marketing require, at some stage, the shopper to click a link that fires up their browser and takes them to what is being advertised. But what if they could buy direct from the message?

While this is possible in email, with something called 'algorithmic merchandising'⁹ – where the email is opened to reveal the relevant catalogue page of the retailer website, rather than the shopper clicking through – it is yet to catch on.

However, changes to how text messaging may yet make this sort of marketing and browser-less commerce more popular. For five years now Google has been working on developing Rich Communications Services (RCS)¹⁰, which it dubs "text 2.0". This is

a rich and much more dynamic form of mobile messaging, that aims to take all the richness of OTT messaging services such as iMessage, WhatsApp, Facebook Messenger and so on and make it as ubiquitous as text.

While currently only being run by some 55 operators worldwide – out of several hundred – and only working on Android, RCS has some way to go to match the uniquely broad reach of SMS, potentially it could revolutionise marketing and retail.

One of the main areas that RCS proponents such as Sinch – formerly CLX – espouse about RCS is that it is an ideal tool for retail marketing¹¹, because it is rich and interactive. It also allows for purchase from the message, without linking back to a browser or web-page overtly. Certainly one to watch.

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RETAIL CHALLENGES — AND HOW TO MEET THEM

There is certainly a groundswell of shoppers looking at these new, browser-less ways to shop and there are certainly technologies out there to cater to these needs. However, they present retailers with a number of challenges.

VOICE INTERACTION

One of the key criticisms of browser-less commerce, especially v-comm, is that it actually makes online shopping more complicated than it is through other channels.

The current state of online and mobile shopping through a browser-based experience – or indeed through an app – is pretty straightforward: you open it, search it, find what you want and click on it. What does browser-less bring?

With voice, there is an argument that, where there is a big choice, or the shopper isn't sure what they are looking for, it isn't the right medium.

However, for regularly bought items and repeat purchases, it is ideal. The example given in the previous chapter about adding a loaf of bread to a Tesco shopping list is a case in point. I want bread: I say "I want bread" and it is added – the bread I usually buy.

This sort of repeat order should not be overlooked. Amazon was on to this nearly four years ago, when it launched its Dash Buttons in 2015¹. These were designed to allow a single item to be conveniently re-ordered at the touch of a button – no browser, apps, or downloads, just a click.

And now, in 2019, Amazon is

discontinuing these buttons. The reason: voice ordering through Alexa is making them redundant².

There is also a challenge with voice around creating the skills to make it work. There are costs, naturally, but there is the complexity of having to create these skills so that they deliver the right experience. Unlike trying to create, say, a mobile app, skills need your IT and marketing department to deconstruct the purchase funnel and extract which parts will make sense with just voice.

That said, the latest versions of Amazon's Echo devices – the Dot and the Echo Show – have a screen³. This changes things. Now, voice ordering can display a choice, allowing the user to then simply say which one they want. This is a big step towards v-commerce becoming mainstream.

VISUAL INTERACTION

Visual search offers fewer of these challenges, being in of itself a search process. The web today is also image based – a picture paints a 1000 words, to coin a phrase – and so the shift towards visual interaction with the internet initiated by visual search and visual-based shopping is more of a natural step.

However, it too comes with its challenges. For starters it means going mobile. Visual search and any commerce that it leads to, is going to predominantly be mobile-based, so retailers need to be mobile-led.

More technically, to make visual search work, retailers need to have highly

structured data. For Google, or any other search process, to find matching images, data needs to conform to ISO 4217⁴ standard, be clearly priced and clearly named.

Images themselves also need to be carefully worked on. Product images that may be searched, as well as those that may be looked at as matches to images being searched, need to be clearly lit, clearly shown and sharp. They also have to be sensibly sized: too large or too small and they won't work.

A wider problem with visual recognition is the sheer scale of what you are trying to do: reconcile a photo of one thing with a different photo of another⁵. With speech recognition, there are only a few thousand commonly used words that need really need to be parsed. With images, the choice is infinite and varied. While machine learning helps these systems get better, it is a huge task to perfect and one that is always going to be a challenge to retailers starting out on this process.

IN-STORE

In-store services, such as image recognition, AR and VR, virtual changing rooms and smart mirrors also present these same challenges – and some of their own.

According to research by eMarketer in 2018⁶, retailers see AR and VR as too expensive and too experimental to implement at present, with some two thirds also suggesting at the time of the research being conducted that the inability to reach audiences at scale has proved challenging.

While, as the technology improves and sees more action in real-world retail environments this view is likely to shift, there are other, perhaps more prosaic, challenges.

How, for instance, can the technology be integrated with the systems already present? This is especially pertinent in-store as many premises often have archaic back-office systems, PoS systems and even a lack of basic network connectivity to make implementing such forward looking systems as AR and VR easy to achieve.

The first step to solving these issues is in building awareness. While implementing AR and VR services – especially in-store – is one that will be a UX improver, rather than a direct revenue generator, it will start to get shoppers using them. This too gives retailers a view as to what sort of hunger there is for these services, as well as outlining where they go next: do they, for instance, need to be transactional, or are they purely advisory?

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MARKETING TO BROWSER-LESS SHOPPERS

Having seen how shoppers are changing and how technology is offering up a new, browser-less retail paradigm, it is worth pausing to assess how this impacts retail marketing.

Much of the browser-less commerce debate centres on how shoppers can use these services, but there is also the issue of how retailers use these new channels to engage and market to them too.

There is also the issue of how a shift towards browser-less commerce changes how retail marketers use the marketing channels they already have to drive shoppers to use these new browser-less offerings.

VOICE: THE NEW RADIO?

With so many households expected to have voice devices by next year – 67 million in the US alone by 2019 – brands have a golden opportunity to reach out to these consumers in new ways.

While voice recognition won't replace traditional advertising and online, mobile and other channels, it will be vital for brands to use the medium to interact with shoppers and to start the sales process.

So how will these devices be used for marketing and how does that fit with browser-less commerce?

Some marketing experts believe that voice devices will allow for a more 'radio like' marketing model, with consumers turning to their devices to get recipes and other hints and tips which can be sponsored, leading to not only an information exchange, but also the direct sale of relevant goods through the voice device.

Food sold on the back of recipes, weather reports for outdoor attractions and fashion

news from new clothes chains have all already tried this in the US¹.

This all means that retail markets need to be creative: they need to start look at how to market around jingles and tunes, or even hanging it around a well-known voice or even a phrase, like they once did on commercial radio.

In the era of voice-activated devices, retailers need to also think about 'wake words' or 'wake phrases' that will fire up their skill rather than another.

Benefit Cosmetics is using traditional advertising to prompt shoppers to ask Alexa for a free sample – a simple way to bring traditional and browser-less marketing together².

This all brings about a whole new paradigm in marketing, moving away from images and logo-based branding to sound branding.

Indeed, Mastercard are already doing this, creating a Sonic Brand³, so that wherever consumers engage with Mastercard across the globe – be it physical, digital or voice environments – the distinct and memorable Mastercard melody will provide simple, seamless familiarity.

Mastercard are very early to the table with this, but it shows the path that retailers are going to have to tread to tap into voice marketing in a browser-less world.

VISUAL MARKETING

The move to v-commerce is less of an issue for marketers: much of what they already do relies on visuals. More, it requires a shift in marketing techniques to take into account the changing behaviour of the shoppers themselves.

Visual commerce already takes in the vast amount of marketing that goes on through social

media sites, especially Instagram. These too are shoppable and, in a sense, browser-less. Marketing here relies, just as in the 'old' days on having excellent images that are searchable.

What has changed in the browser-less commerce world is that images are no longer 'eye candy' to augment text, they are part of the story telling process. In a world moving towards AR and VR, this interactive visual content is going to increasingly be vital to retail marketers

AR opens up a range of opportunities to retailers to tell better stories. AR can be the marketing: adding what you want to say to the observable world of the shopper.

For instance, creating virtual tours in the store can add an element of fun while allowing buyers to learn more about products or services. For example, Watchbox, a luxury watch reseller, has an AR app that allows consumers to try on watches virtually using AR and compare looks⁴.

This allows marketers to help shoppers experience online goods in a more 'real' way, while using AR in stores can help to add greater range of experiences and products within the store.

THE DATA DIVIDEND

For marketers, this new world of browser-less commerce is going to change how they operate – but rest assured it will still be driven by data. Today, marketing uses data to assess behaviour and to segment and target. In a more visual, voice and AR world, data will still rule, but it will be live behavioural data that will help them target shoppers in the moment.

The focus will shift to behavioural data which, when quickly analysed and acted upon, gives experience makers replacement cues to segment, personalise and optimise⁵. This analysis and activation is a key area of activity for machine learning which, according to Forbes, with 57% of enterprise executives believing the most significant growth benefit of AI and machine learning will be in the area of improving customer experience and support.

While many marketers are getting to grips

today with GDPR in the established marketing world, there are going to also be issues with this new era of marketing based around voice, visual and AR based commerce. Much of the 'live' data can be treated as data is today – anonymised and destroyed.

A larger concern is whether to let devices in people's homes – such as voice control smart devices – listen to what is going on and act upon it. Currently, these devices do listen to everything that is said, but they only act on things said after their 'wake words'. Only then do they share with their servers what has been said⁶.

But what if that changes? What if, as browser-less commerce takes off and becomes more entrenched brands want to ask if they can listen in? This is very new and something marketers still wrestle with.

REGIONAL DIFFERENCES

Marketers also face the challenge of how to extend their marketing and services through these devices to other regions. Accents – even local regional accents and phraseology – can impact what does and doesn't work semantically, which is a consideration that needs to be addressed.

Cross-border operations are always going to have issues with language barriers and cultural differences, but these can be magnified in the voice commerce world regionally within a single country, driven by accent, culture and semantics.

Planning a marketing strategy around these issues is also a new challenge.

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14 ● Case studies

We have seen the move towards voice, visual and AR based retail and their associated marketing tropes in theory. So what are real world retailers doing in practice?

ARGOS USES VOICE



Argos has combined click and collect with voice commerce, launching a service that shoppers can use to reserve from a range of 20,000 products for same-day pick-up from a store.

Customers use the Voice Shop service via Google Assistant on their iOS or Android smartphone, or on a smart speaker to speak their order, from a range that includes toys, technology and home essentials. After confirming their order via their phone, they can pick it up from one of 850 Argos stores as early as the same day.

Shoppers can also use the assistant to search for a product and check availability, or to find their nearest store.

"Voice technology has the potential to revolutionise how we shop in the future," says John Rogers, Argos chief executive. "Digital home assistants have soared in popularity over the past year and people are increasingly looking to their smart devices to help with the smooth running of their lives."

So, how does voice shop work?

Customers start the conversation with the phrase, "OK Google, ask Argos" followed by the item that's needed. A search for a kettle might start by saying, "OK Google, ask Argos to find me a kettle". Alternatively, OK Google, talk to Argos" opens a more general conversation.

Voice Shop will then ask for more information, such as "how much do you want to pay" or "which store do you want to collect from?" to narrow down the search.

When a shopper has found the right product, Voice Shop will ask if they want to reserve it and send a notification to their phone. By opening the notification, shoppers can confirm their order.

Finally, the customer will go to the store with the reservation order sent to them via email. Once there they can collect and pay for the item.

BENEFIT COSMETICS GIVES VOICE TO FREE SAMPLES



Cosmetics brand Benefit Cosmetics has launched a voice-led campaign with Send Me A Sample – the first cosmetics brand in the UK to do so.

Consumers have been served ads with the Send Me A Sample call to action, which prompts them to simply request a sample of Benefit's POREfessional primer via Google Assistant or Alexa. It's the first time the UK cosmetics brand has used Voice to get its product into the hands of consumers.

The campaign will allow Benefit Cosmetics to not only tap into the nascent voice commerce market, but also to accrue a wealth of customer data. The average opt-in rate with Send Me A Sample is

50%, with most brands offering a minimum of 10,000 samples.

"At Benefit Cosmetics, sampling is essential for us as a way to raise awareness of specific products and increase brand loyalty," says a spokesperson for Benefit. "While essential it can also be problematic, as it's not always easy to get key insights into who you're sampling with and to be able to follow up."

Commenting on the future of voice-led campaigns, Will Glynn-Jones, co-founder of Send Me A Sample says: "Voice may be the 'buzzword' of the year but there's good reason for that – given it's used in the correct way. The real value of voice-led campaigns comes from the collection of data from users who opt-in and who have tried the product at brand level. This wealth of data can play a crucial role when it comes to brands re-targeting and building ongoing relationship with consumers."

M&S JOINS GROWING LIST OF RETAILERS USING VISUAL SEARCH



Marks & Spencer (M&S) joins the small but growing number of retailers offering visual search on mobile as a new way to buy.

Launched in late 2018, M&S Style Finder is a photo search feature that lives on M&S' mobile website, enabling customers to seamlessly discover a desired look with just a couple of taps.

For the initial roll-out, Style Finder is available across womenswear and menswear and customers can easily navigate and filter through thousands of stylish M&S products. Customers can upload an existing photo, or take a new one, of any outfit to reveal similar-looking products available at M&S, offering a quick and easy way to shop online.

Whether customers are inspired by things they see on social media, an outfit in a magazine, something someone is wearing (if you can surreptitiously get a snap!), or a product in-store, the new feature helps them find what they're looking for in less than 10 seconds, says the retailer.

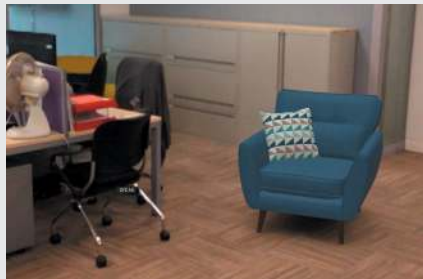
With 75% of all M&S's online visits coming from mobile and tablet devices, Style Finder offers a completely new and enhanced shopping experience for busy customers who seek wardrobe inspiration while on the go.

"We know our customers are busier than ever and are often most inspired when they're out and about. Style Finder helps customers instantly find what they're looking for, without the need to manually search and filter through our products," Jim Cruickshank, Head of Digital Product and UX at M&S, says. "Enhancing the customer experience is central to our digital transformation journey. This is a brilliant example of how we're becoming more relevant, more often, to our customers who are increasingly shopping online and in particular using mobile devices."

M&S's Style Finder tool uses artificial intelligence (AI) to display results with the closest-match. Customers can add additional filters to help them find the perfect product based on personal preferences, such as size, price and colour.

The visual search technology has been developed with Syte and is available on M&S.com using mobile devices and the initiative is part of M&S's digital-first strategy, which aims for a third of all Clothing & Home sales to be online by 2022.

DFS BRING AR TO ITS WEB AND MOBILE EXPERIENCE



DFS, a leading UK upholstery retailer, is upping its online and mobile experience with the addition of AR, which places furniture in the room virtually, giving shoppers and idea of who things fit.

With 40% of the upholstery industry's web traffic to its name, DFS worked with global eCommerce consultancy Salmon, a Wunderman Commerce company, to implement the new feature.

The AR functionality – which uses the latest iOS 12 software update introduced in 2018 by Apple – allows iPhone and iPad users to place a piece of furniture in their home and visualise how it looks and fits.

Users can point the device at any space in the lounge using the camera function, where the piece can be moved around the room in real-time and to scale.

The technology is the first of its kind to automatically detect room space and work purely in a browser, without the need for a "marker" object to determine room dimensions or a separate downloadable app, making it even simpler for customers to use.

DFS has a proven track record of growing sales through eCommerce. Salmon led the project, consulting with DFS to develop the prototype and enable the new functionality. All 3D-rendered model assets needed to support the launch were created by Viutek

"We wanted to offer something truly unique to our customers that was not only aesthetically pleasing, but intuitive and practical too," explains James Vernon, Head of Online at DFS. "Choosing a new piece of furniture is never an easy task – particularly online – but the new AR-enabled feature will help improve the online shopping experience and make the purchasing decision much easier. We're all extremely proud to be the first sofa retailer to truly take advantage of this new technology."

SUMMARY

Not so long ago, shopping involved going in to a store and asking the person behind the counter – the shopkeeper – for what you wanted. In the internet age that all seems very old hat.

Shopping has move online and tapping a web address into a browser has taken over as the *de facto* way of starting an online shopping journey. While browsers have become smarter at letting you just pop in the name of the company and looking up its URL for you, this way of doing things seems immutable.

However, it is changing. Thanks to voice activated devices, the rise of visual search and the implementation of augmented and virtual reality (AR and VR), retailers are starting to have to think about 'browser-less commerce' – interactions that lead to a sale that do not use URLs or even browsers, but which are driven by voice commands, photos, the need to try on things virtually and a general shift by shoppers towards a more 'natural' interaction with commerce – a bit like when they used to go in store and talk to the shopkeeper and ask for things.

What is driving this change and what it means for retailers – online and in the real world – is one of the biggest questions for 2019. In this eBook we uncover what is driving this change, what retailers can do to meet the challenges and what it means for them going forward.

Drawing on case studies from key leaders in this market and assessing what the retail community has achieved so far, this book outlines just where retail might be going in a browser-less world and what that might mean for retail craft, retail marketing and consumer habits.

So, Alexa, hold my calls and read on....



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