

EUROPE'S TOP500: THE CUSTOMER

One of six Performance Dimension Reports within
the InternetRetailing Europe Top500 ranking

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IN THE 2017-18 IREU TOP500 SERIES	
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Brand Engagement	Published November 2017 – download at etail.li/eubranddownload
Mobile & Cross-channel	Published January 2018 – download at etail.li/eumobiledownload
The Customer	This report – available online at etail.li/b3d07
Strategy & Innovation	To be published during 2018 – subscribe to get early access: internetretailing.net/subscribe
Operations & Logistics	
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FROM THE EDITOR-IN-CHIEF

Welcome to the latest Executive Summary in our IREU Top500 Performance Dimension Report series. This time around, the focus is on The Customer. Over the following pages we look at how customer service and the customer experience are becoming central to retailers' efforts to secure market share across Europe.

To find out more and to see longer versions of the articles here, please visit InternetRetailing.net and please do get in touch to share your thoughts.



Ian Jindal
Editor-in-chief
ian@internetretailing.net

A REMINDER: THE ELITE SIX IN THE IREU TOP500

	Apple	Elite
	Boots	Elite
	H&M	Elite
	IKEA	Elite
	Nike	Elite
ZARA	ZARA	Elite

THE CUSTOMER: THE BEST 50, LISTED ALPHABETICALLY

Apple, Argos, Bol.com, Bonmarché, Boots, Clas Ohlson, El Corte Inglés, Currys PC World, Debenhams, Disney Store, Dunelm, Empik.com, Euronics, Fat Face, Footasylum, H.Samuel, H&M, Halfords, Hobbycraft, Homebase, House of Fraser, Iceland, Ikea, Jacamo, John Lewis, MajesticWine, Marks & Spencer, Matalan, New Look, Next, Nike, NotOnTheHighStreet.com, Oasis, Ocado, Office, The Perfume Shop, The Range, RTV Euro AGD, Sainsbury's, Samsung, Screwfix, size?, Superdry, Tesco, TK Maxx, Toys R Us, Very, Waitrose, WHSmith, Wilko

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FURTHER READING


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- © The IRUK Top500 internetretailing.net/iruk/
- © The Brand Index internetretailing.net/irbx/

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PARTNERS' INSIGHTS

TAKE RISKS TO STAY AHEAD



"Consumers' ever-changing behaviour means retailers need to be prepared to step outside their comfort zone, and take risks with new channels and approaches" 


Grant Coleman

VP & Market Director – UK, SC, MEA at Emarsys considers how retailers can better serve mobile-first customers

- Smartphone use now eclipses the time consumers spend on desktops
- Retailers need to keep up with changes in the way people engage on their mobiles.
- In the age of individualism, each customer interaction must be truly personal
- We will see more and more brands embracing AI to differentiate themselves, to wow audiences and to drive engagement

COUNTER THE FILTER BUBBLE EFFECT



"Get data 'right' and businesses can be quicker, more agile. It's as important as ever to work towards getting a single view of stock, sales and customers" 

Ian Tomlinson @Ian_cybertill

CEO of retail technology firm Cybertill discusses the new rules of personalisation

- Nobody likes being pigeonholed, told they're a certain kind of person, but we do want to be understood and, for example, to receive personalised offerings from retailers
- This creates a tension within modern retail. Badly implemented personalisation initiatives can suffer from a customers-who-bought-this-also-bought-this 'filter bubble' effect
- To counter this, retailers need to have better and richer data
- This relies in part on opening and sustaining conversations with customers who have a sophisticated understanding of the value of their personal data

IN DETAIL ONLINE

- Emarsys, stay ahead: <http://etail.li/227a7>
- Cybertill, how to counter the bubble effect: <http://etail.li/62f10>

FURTHER READING

- Emarsys: www.emarsys.com
- Cybertill: www.cybertill.com

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STRATEGIC OVERVIEW

THE CONTEXT

The challenges facing European retailers:

- Customers used to be well trained: They would arrive at a store, rely on sales staff for information, trust their recommendations, pay by cash or card, and then carry their shopping away. Today, if a customer actually bothers to visit a store, it may be just to 'touch and feel' an item already pre-selected on the internet, with Amazon a regular destination for product and price research
- This trend is deepening. A study by marketplace OnBuy.com found that almost two-thirds of shoppers in the 25-34 age group preferred to use texts, online chat or messenger apps to interact with retailers rather than actually speak to a sales assistant
- But shoppers still value stores. A survey of more than 180,000 consumers by KPMG last year, *The Truth About Online Consumers*, found that 39% of millennials preferred shops to buying online. Why? A need for instant gratification rather than waiting for a delivery
- Consumers are choosing to purchase via mobile. PwC's *Total Retail Survey 2017* found that in Europe up to a third of shoppers regularly bought products at least monthly via a mobile device

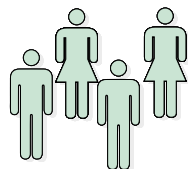
OUR RESEARCH TERRITORY

IREU RESEARCH COVERS THE EEA (PLUS SWITZERLAND), 32 COUNTRIES THAT FORM A TRADE BLOC, ESTABLISHED IN 1994. THE EEA COMPRISES THE 28 EU COUNTRIES, AS WELL AS ICELAND, NORWAY AND LIECHTENSTEIN.

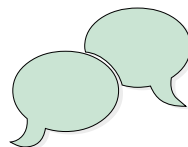
THE EEA (PLUS SWITZERLAND) SPANS



32 COUNTRIES



500M CUSTOMERS



26 OFFICIAL LANGUAGES



EU EEA

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IN DETAIL ONLINE

- Strategic overview: <http://etail.li/30cc4>

FURTHER READING

- Data source, PwC: <http://etail.li/22a95>
- Data source, KPMG: <http://etail.li/219aa>

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THE SOLUTION

Retailers need to embrace the established techniques that support their success:

- A recent study by Shopgate suggests that, typically, we check our phones 150 times a day. Faced with this behaviour, retailers need rather more than a transactional mobile site. They need one that is capable of providing the same functionality as their main online presence
- Retailers also need to offer relevant apps, link any loyalty scheme to digital wallets, ensure rapid page-loading speeds, use geolocation promotional tactics, add QR codes in-store as well as providing free wi-fi there. Or, perhaps, equip store staff with mobile devices to respond to queries from those millennials unwilling to speak to them directly
- But don't forget this is a time of transition. As well as embracing the leading-edge technologies favoured by younger age groups, retailers have to serve other, more conservative, customers too. This requires an even greater understanding of customer profiles and target segments than retailers already achieve
- According to Eurostat, the number of European customers buying cross-border within the EU rose by 8% between 2012 and 2017, while those buying from non-EU sites increased slightly more, by 10%. With consumers across Europe are gradually becoming more comfortable with the idea of buying from retailers outside a home nation, there's an opportunity to build customer loyalty by making it easy for them
- Work with emerging consumer behaviour. Christmas saw Amazon sell "many millions" of its Echo smart speakers. Ocado has now enabled voice-activated grocery shopping via the devices, which – it seems – contributed to a significant upturn in customer numbers last year and a 12.4% increase in sales revenue

It's millennials have been driving the mobile revolution by demanding ever-faster fulfilment options, what about the next generation – variously dubbed the post-millennials, digital natives or Generation Z? Will they be happier dealing with a robot than a sales assistant while expecting many of their purchases to be delivered instantly by 3D printers?

Also, speech-enabled capability on all types of device is no longer a pipe dream. Retailers must swiftly respond to this with apps that shoppers find helpful, not just gimmicky.

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APPROACHES THAT WORK

RETAILERS NEEDS TO DELIVER CONVENIENCE, SPEED, PERSONALISATION AND EASE OF USE TO FIND FAVOUR WITH CUSTOMERS. HERE'S HOW...

- Offer local support: Swedish hardware retailer Clas Ohlson has only six stores in England, but its website provides a London telephone number for customer calls. Next provides a mix of UK numbers for local call centres on its various websites, numbers that are generally related to language and time zone
- Flaunt your languages: That little national flag at the top right corner of the landing page has become a readily understood symbol for multilingual websites, although not everyone takes this approach. Land on H&M for the first time and you're presented with a pop-up window of 60-plus countries. Languages are clearly indicated, including relevant choices for Belgium and Switzerland
- Make it clear who can buy: NotOnTheHighStreet sells items from a great many individual suppliers, so delivery information is included on every product page. This makes prices and lead times easily accessible, as well as highlighting which goods cannot be supplied cross-border
- Be generous about returns: EU law states that retailers need to offer at least 14 days from receipt for goods to be returned, but others are more generous. IKEA has a "365 days to change your mind" policy. Even if the item has been assembled, as long as it is still saleable, they will still take it back
- Get personal: For many of today's customers, personalisation is key. Whether personalisation takes the form of a precisely targeted offer, an exclusive loyalty benefit, individualised products, or cosmetics selected in response to a detailed questionnaire about their skin or hair type, shoppers want to feel there's something that's been specially designed for them
- Watch your speed: Today's customers can be intolerant of poor performance. If a page takes too long to load then the odds are they will click onto another site rather than wait. Studies suggest a direct correlation between load time and abandonment: head past four seconds and the chances are that one in four would-be shoppers will go elsewhere
- Make it easy to give feedback: More than half of the Top500 encourage customers to leave product ratings and reviews, with many encouraging feedback on specific parameters. Fat Face asks customers to confirm if the item was "true to size" as well as asking customers to give their age group – useful feedback for any retailer wanting to understand its customer mix

IN DETAIL ONLINE

- 12 approaches that work: <http://etail.li/a5843>

FURTHER READING

- Clas Ohlson: www.clasohlson.com/uk/
- H&M: www.hm.com
- www.notonthehighstreet.com

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CASE STUDY: THE POST OFFICE

THE CHALLENGE: The Post Office is one of Europe's largest retail networks, with more than 11,600 branches. It has a modernising agenda, but has a social as well as a commercial mission.


THE ANALYSIS: Since 2015, the Post Office has become the UK's fastest-growing provider of personal and business banking services, as well as being a leading provider of travel money services. These changes have all formed part of a wider effort to boost footfall and maintain social engagement, relevance and income for the more than 10,000 independent businesses that run Post Office branches.

Throughout this process, the company has needed to keep customers and customer engagement in focus. "Personal relevance – that is, how we can be relevant to each individual in context – is crucial, because what the Post Office means and does for customers has diversified," says Darren Jones, social media & audience insight manager at the Post Office.

THE RESPONSE:

- The Post Office has used specific online and social media campaigns in order to, for example, show itself as what Jones describes as, "a credible alternative in financial services and in telecoms"
- One example of this is its #SummerSorted campaign, which aimed to build awareness of Post Office travel money products
- After identifying a target audience, the company implemented a social strategy into four focus areas, including incentives to buy travel money and uplifting content about summer travel
- The Post Office increased its number of subscribers by 113% via its use of engaging content. The campaign helped the company to grow brand awareness, which is important in its efforts to establish itself as a leading financial service provider
- More generally, the company is using digital activity and digital services to reduce the clutter and complexity in its branches



"We need to keep Post Office branches open, and the right customer experience across all channels is what makes that more likely" 


Darren Jones,
social media & audience insight manager, Post Office

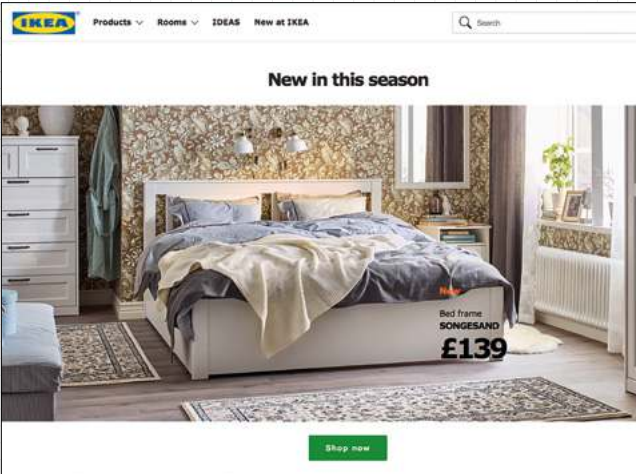
IN DETAIL ONLINE


- Post Office: getting social with customers:
<http://etail.li/3caf7>

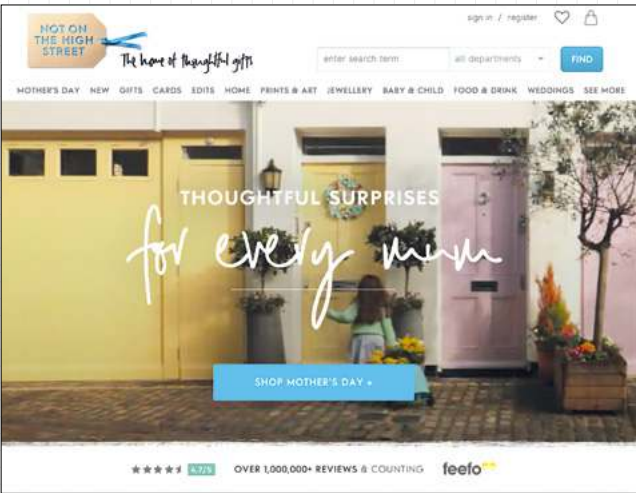
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CASE STUDIES: FOUR EXAMPLES

 Friction in the retail process needn't be a bad thing. In IKEA stores, customers expect a very particular feel that requires a certain engagement and do-it-yourself mentality – and of course customers still have to build the furniture when they get home. The wider point is that when customers cannot remember a retail experience, they cannot be loyal to it. IKEA's approach creates a unique customer experience that differentiates it from competitors.



 As early as 2016, Notonthehighstreet.com brought Apple Pay to its website, ahead of many other retailers. The marketplace business gives an online presence to creative small businesses that sell original and handmade items. It has also rolled out "physical manifestations" at locations such as London's Old Spitalfields Market. This offers a way to link small suppliers and manufacturers, which may not even have retail premises, with customers.



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© IKEA: friction and the customer experience <http://etail.li/117b4>

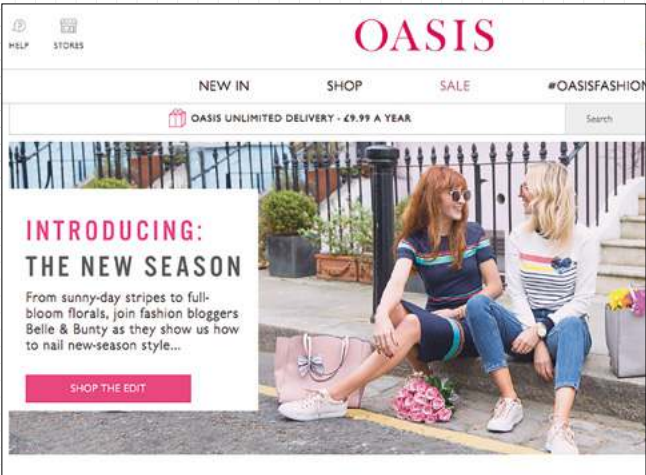
FURTHER READING

© Notonthehighstreet – how an online market gets physical: <http://etail.li/b5a46>

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CASE STUDIES: FOUR EXAMPLES

OASIS The fashion brand took the customer experience a step further with its new-season previews in April 2017, when it launched its autumn 2017 collections. In The Extraordinary, a dimly lit, moody gallery space at 15 Bateman Street in London, it held its inaugural ‘customer preview’ alongside the usual press previews. “Our hope was that our loyal customers would feel special: they were getting a sneak peek into a world that is cut off from them,” said customer director Briony Garbett.



TESCO Tesco has been at the forefront of customer engagement ever since it launched its loyalty scheme with the Clubcard in 1995. These days, 10m active households have signed up to Tesco Clubcard and it is among a minority that gives shoppers a contactless scan for their loyalty cards. In customer terms, the retailer also rates for personalisation and ranks well for responding quickly to customers' Facebook queries.



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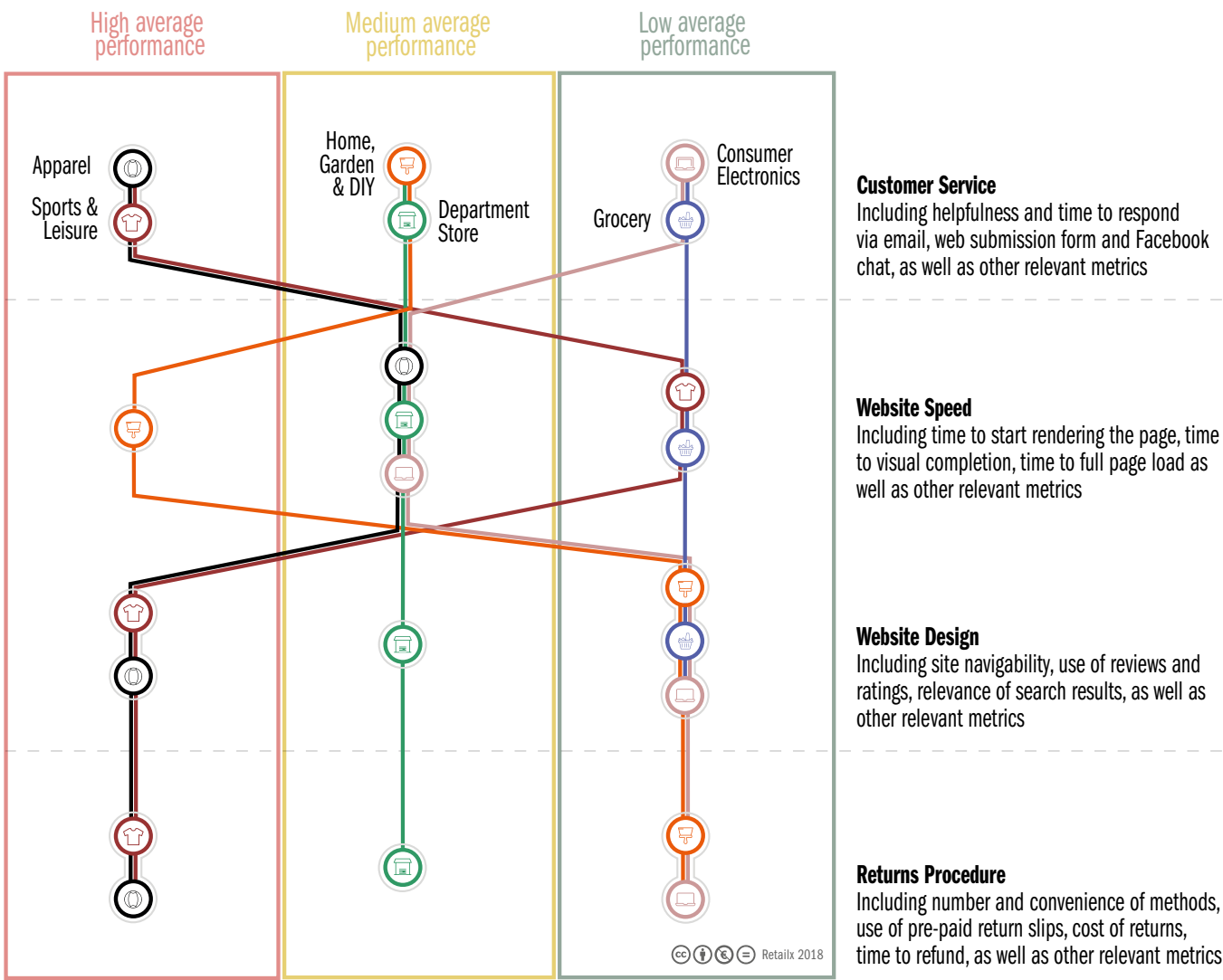
© Oasis: omnichannel all-rounder with added flair: <http://etail.li/4fed1>

FURTHER READING

© Tesco: loyalty still matters, 23 years on <http://etail.li/47cbe>

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CUSTOMER EXPERIENCE: SECTOR AVERAGE PERFORMANCE



SECTOR ANALYSIS

- Apparel and Sports & Leisure retailers have a high average performance in three of four measured areas
- High average performance sectors generally are comprised of more companies than lower performing sectors
- Department stores demonstrate an average performance that is mid-range and consistent across all four areas of customer experience displayed here
- There is a surprising, and probably coincidental, correlation between average performance in the areas of Website Design and Returns Procedure
- Grocers have a low average performance in the three applicable areas

IN DETAIL ONLINE

© Inspiring loyalty with cross-channel service

<http://etail.li/971fb>

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'PRACTICE OF THE BEST': WHAT WE MEASURED

When compiling the IREU Top500, RetailX researchers took a holistic approach to measuring what constitutes great customer service and a great customer experience. That's because companies differentiate themselves within spheres of retail practice once seen as the preserve of back-office workers or logistics professionals, such as returns and deliveries.

Our research therefore took in, and continues to take in, such areas such as customer service response times, mobile as well as desktop homepage performance, localisation, product ratings, mobile app features and customer feedback options such as enabling consumers to leave reviews. We also looked at the use of multichannel loyalty programmes.

THE KEY RESULTS: WHAT WE LEARNED

PROCESSES:

Within the EU, retailers have to allow customers 14 days to return goods. However, across the EEA, Top500 retailers already exceed this minimum, with 18 days being the median number of days offered by most retailers. In Romania and Italy, this rises to 30 days.

Offering to refund the cost of returns is offered by 15% of retailers across the EEA. It's a service that's most developed in the UK, where it's offered by 21% of retailers as it becomes increasingly commonplace for customers to buy items in more than one size or colour before returning those they don't want.

WEBSITE FEEDBACK AND NAVIGABILITY:

Overall, 54% of retailers operating in the EEA offer the facility for customers to post product ratings on product pages, while 56% allow posting product reviews. Intriguingly, there's a strong correlation between these two figures when it comes to individual countries. In Portugal, one of the poorest-performing territories in this metric, 32% of retailers offer both product ratings and reviews.

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'PRACTICE OF THE BEST: WHAT WE MEASURED

MOBILE WEBSITE PERFORMANCE

Within the EEA, the median time for a mobile site to download is 8.2 seconds. Industry bodies generally set the benchmark at just two and a half to three seconds to be visually rendered, so it seems that many of the Europe Top500 are struggling with the basics. In the Czech Republic, the Netherlands and the Baltic nations, the equivalent figure is around six seconds, but nine seconds in the UK, Austria and Denmark. All these figures are based on the same relatively high end user data speed and testing apparatus.

MOBILE APPS

Considering the importance of mobile, these are still underdeveloped across Europe, with just 7% of multichannel retailers with an app, for example, offering the ability to scan a store loyalty card, an important technique in joining up channels. In high-performing Ireland, the equivalent figure was 17%.

Across the EEA, 21% of apps had serious bugs likely to cause crashing or failure to function as designed, and are severely marked down in The Customer Dimension. Apps deployed by retailers in Portugal and Spain performed most poorly, with 31% off apps having serious bugs. The best-designed apps were in Romania, Austria and Germany, but even here, respectively, 13%, 17% and 18% of apps had serious bugs.

DESKTOP WEBSITE PERFORMANCE

Across the EEA, desktop websites take a median of 8.45 seconds to be visually complete. There are more subtle ways to measure performance here, including through time-to-interaction and the parts of the page that render first, but as a consistently-measured figure it indicates an industry that is falling far short of the standards it has set collectively and, more important, of the standards consumers expect.

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REVOLUTIONISING THE MARKETER'S ROLE

AI Marketing


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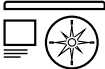



METHODOLOGY


THE CUSTOMER DIMENSION covers the experience of customers shopping with the retailer. The research falls under six categories:


- 

Customer service response time and helpfulness, including Facebook and email tests
- 

Mobile and desktop homepage performance, including engineering and responsiveness
- 

Localisation, including customer service and communication channels as well as fulfilment
- 

Mobile and desktop website navigation, measuring, among other things, the ease of finding desired products through the use of tabs, icons, search and filtering
- 

Customer feedback options, such as consumer reviews and product ratings on the product display page and channels to communicate
- 

Mobile app features, including personalisation features, performance and usability, as well as the ability to leave and see reviews and ratings [retailers with mobile apps]

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© Methodology: <http://etail.li/ba128>

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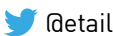
FURTHER RESEARCH

BEYOND THIS EXECUTIVE SUMMARY



THE FULL REPORT

Read full versions of all the articles featured in this Executive Summary on the InternetRetailing website: <http://etail.li/b3d07>



THE IRUK TOP500

The companion to the IREU Top500, this report is now in its fourth year and focuses upon the best-performing retailers, brands and ecommerce pureplays in the highly competitive UK market.
www.internetretailing.net/iruk

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InternetRetailing Media Services Ltd,
52-54 Gracechurch Street,
London, EC3V 0EH
Printed in Great Britain.
ISSN 1759-0582

Data supplied by RetailX.
www.retailx.net
www.internetretailing.net



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Businesses need to have a clear understanding of the data they hold before EU-driven changes to data laws come into effect.

On 25 May 2018, the General Data Protection Regulation (GDPR) replaces the 1988 Data Protection Act. GDPR aims to give control of personal data back to individuals and to simplify rules for international businesses by harmonising EU regulation. GDPR will affect how businesses collect, store and use information about both customers and staff. Getting this wrong can lead to fines of up to €20m or 4% of an organisation's annual turnover.

GDPR's basic requirements are:

- Companies with more than 250 employees must appoint an independent data protection officer to make sure the business collects and secures personal data
- GDPR applies to smaller businesses if they handle data that is likely to put rights and freedoms of the data subjects at risk, or if data is used regularly
- Customers must give their active consent for businesses to use their data for marketing or profiling
- Data breaches must be reported immediately to the Information Commissioner's Office (in the UK) – ideally within 24 hours but within 72 hours at the latest
- People (not just customers) have the "right to be forgotten" if they withdraw consent, or if data relating to them isn't needed any longer

Retailers are likely to find GDPR particularly challenging. Data is the key to understanding customers and many retailers rely on large troves of information built up as customers interact with them. This, along with their high profiles, makes retailers obvious prey for hackers and opportunistic claims – which are both likely to increase under GDPR.

All this means extra costs and management time, both in preparation for GDPR and in staying up to date with its demands. GDPR's scope is wide. As well as emails and purchase histories, it covers video, CCTV and eye-tracking data as well as old-style paper forms. Any information a retailer holds on a customer counts.

IN DETAIL ONLINE

○ Get ready for GDPR: <http://etail.li/31bdf>

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RetailStore

More than just a POS

*Turn your point of sale into a **point of service** and delight your customers in-store and online.*

For retailers with multiple stores, point of sale software should do so much more than simply take a sale. Smart retailers are using point of sale systems to better serve customers on and off the shop floor. Your point of sale software should not only provide a single view of stock, sales, and customers, but also ensure that data is available in real-time to all business systems and teams.

RetailStore is unique. It's not just a point of sale software, it's an intelligent hub of business critical information. It's a point of service, unifying your operations, arming your staff with information, and future proofing your growing retail business.



Outstanding **POS software** with real-time, secure stock, sales, and customer data visibility



Omnichannel sales and returns processing including click and collect, dropship, and inter-store transfers



Enhanced customer experience with touch screen **mobile POS** and **e-receipt** options



Advanced real-time reporting including accounting, budgeting and forecasting



Seamless **integration** into existing ERP, accounting, ecommerce systems, and more

Trusted by multi-store retailers and brands

MUSTO

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JEWELLERS SINCE 1856

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bags ETC.

postMark
ONLINE

Cybertill

Pioneering in-store technology since 2001

Cybertill's cloud-based, modular retail management platform, RetailStore, helps multi-store retailers improve omnichannel customer experience. RetailStore enables real-time single view of stock, sales, and customers across all customer touchpoints including branded shops, mobile points of sale, click and collect points, franchises, concessions, and ecommerce. Arrange a free, no obligation, software demonstration cybertill.com/arrange-a-demo or call us on 0800 030 4459

PREPARING FOR THE FUTURE TODAY

Over the past two or three years, personalisation has been a recurring theme within retail. It's easy to see why. Connected to the mobile internet and checking smartphones several times a day, we have all become used to being able to get what we want, when we want it. We've also grown intolerant of delays. Any retailer that can meet this impatience by guiding shoppers towards the items they want to buy is more likely to succeed.

To do this, retailers need to understand what their customers want and, in recent years, the amount of new customer data available has held out the promise of being able to build retail offerings around individual customers – drawing on data sets that range from a customer's purchase histories through to social media interactions.

Simple. Except that working with such data is anything but simple. For a start, there's the sheer amount of information, all of which needs to be organised in ways the retailer can use. If that weren't complex enough, as we explore in our Looking Ahead feature (left), new GDPR regulations give consumers much more control over their personal data.

This is important because it may be that consumers will start to exercise this control and become fussier about what kinds of information they will share. Current personalisation techniques may not work if consumers begin to withhold the information on which these techniques rely.

But this needn't be the end of personalisation. All the evidence suggests that consumers are happy to share information if they think there's a genuine benefit to them. It may be, though, that consumers will become more demanding and will ask retailers to prove they are worthy of trust before they will share information – or even to continue to share information. After all, one facet of the GDPR legislation is that it enshrines the right of customers to be forgotten if they withdraw consent or data relating to them isn't needed any longer.

We hope you've enjoyed this IREU Dimension report Executive Summary on The Customer

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