**NEW REPORT**

# Store Of The Future 2014

Towards the smart store - learning from online, copying success factors, making USPs count

ResearchFARM


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December 2013

# OVERVIEW: A SHOPPER JOURNEY

## Out of town

- How can out of town stores stay relevant as much of their space will become redundant going forward?
- Can they pivot on existing infrastructure, supply chain integration and assets?
- Are there examples for successful transformations?


## High street

- How can the high street innovate? What is the triple bottom line?
- Why is predestrianisation such a buzz theme?
- What will be the impact on logistics?
- What will the smart city mean for retailing?
- Will same day delivery morph into crowdsourced models?
- Why are independent book stores in the USA growing again – in spite of Amazon or because of Amazon?
- What is the future of the convenience store? Why are travel locations so significant?

## Logistics

- How will logistics reorganisation drive a revival of both high streets and out of town?
- How can bricks and mortar players copy the rise of prime and what can they do about it?
- Will Heathrow's Terminal 5 logistics set up become a model for the future high street? Westfield is using the same model already, there are other EU examples.
- How big will the modal shift become? Will logistics be all about the road in future?

## Technology

- How can stores mimmick the ecosystem approach so successfully deployed by online players such as Amazon or Apple (kindle, iTunes)?
- Will clienteling transform department stores, luxury players and car showrooms, what about other sectors?
- What loyalty approaches enable real time data visibility in store? Showing path to purchase history, consideration index and so on and thereby driving up conversion rates and enabling up-selling?


## Creating destination status

- How can store based players combat the rise of online marketplaces by adopting similar models in the physical world? Who is doing this already?
- Why has Giraffe Watford become the best performer in the whole Group?
- Are restaurants the only way to drive future footfall into out of town centres?

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Zoom in to read

# SAMPLE PAGES

## The out of town hypermarket: Carrefour's Planete – too costly, little traction



In France, where the hypers have suffered for years – also, it has be said, caused by specific French legislative hurdles, such as the Loi Raffarin, not just by oversaturation – the erstwhile market leader Carrefour tried to move the stores more upmarket with the planete concept. This proved costly and did not deliver the desired uplifts, as shoppers did not start to spend freely because of hairdressers and sushi bars in their hypermarkets. One explanation is that French shoppers looked for value in a recessionary environment, explaining the success of E.Leclerc, and hence rejecting the planete makeover, another is that hypermarket revitalisation is difficult to pull off, as many secular trends count against the model, as we just discussed on the previous slide.

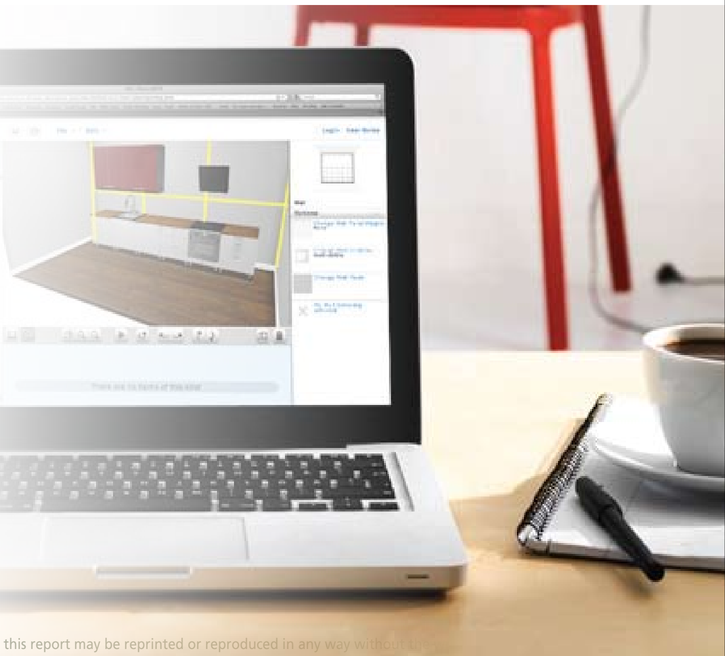
**For the hypermarkets at the moment it is all about how to draw footfall**, and the importance of food service should not be understood, Tesco's current strategy around partnering up with the restaurant chain Giraffe is a good example of this. We will go into a bit more detail on restaurants and food service later on.

However another strand of thinking comes to the conclusion that **much of the out of town hypermarket space acquired during the boom times** when retailers were expanding, resulting in a space race between the competitors **is now redundant**. The UK's DIY market leader B&Q sharing and subletting an outlet to Asda would be an example of the latter strand of thinking.





IKE



**Services on the IKEA website include the option to download interior planning software, whereby customers are presented with the opportunity to interactively create a unique and tailored design for the room they wish to furnish.**

One such example is the 3D kitchen planner which includes features such as a 3D virtual centre to customise products, and a detailed floor plan which can be printed with dimensions to aid in the furnishing process. The ordered item can then be saved on the online server to be picked up at the closest IKEA store (guaranteeing footfall). The planning service is user friendly, whereby furniture can be chosen and customised using a drag, drop and rearrange facility.

**In the past, in order to design the layout of a room, IKEA customers had to plan in-store, making the latest online service more convenient with regards to time and travel**. The tool could also be critical as it presents a new and innovative way to engage and expand the range of services available with customers. For instance, when designing a kitchen, a specialised IKEA team is needed to install the units, not only contributing to revenues, but also enhancing reputation. It should be noted, that made-to-order products designed in this manner are non-refundable.

# TESTIMONIALS AND CLIENTS

*«For us the ResearchFarm reports are so useful. The information provided give us the opportunity to increase our knowledge about the retail industry and its key trends.» Rafael Florez CEO GS1 Columbia*

*«I found it very insightful. [...] Impressed with the amount of information that has been covered by your report.»* (Retail merchandising company)

*«I found the document easy to read, well laid out and the content thought-provoking. It reminds me of the major considerations that affect our markets, and to address these key issues when approaching the global brands and retailers.»* (Technology supplier)

*«The content is very interesting to us, as we look after many of the largest shopping centres and we also represent many international retailers entering our market. There is plenty of food for thought.»* (Property consultants)

*«It was helpful. It helped me to persuade my boss to take on a project about e-commerce research. I was really surprised by the importance of legal issues. I never read that elsewhere before.» (Government)*

*«Thank you again for the study. These are very, very interesting, well explained (so, logical) predictions. Highly reliable and useful (I like the idea very much that loyalty schemes will move onto smartphones). It's quite impressive!»* (Publishing group)

*«On DLF's (Danish Association of Fast Moving Consumer Goods Manufacturers) New Years Conference we had the great pleasure to hear ResearchFarm speak about future trends in online grocery retailing. The feed back from the conference participants was very positive as they gave ResearchFarm's presentation the highest score of all speakers, finding the analysis about the key success factors of chosen EU and US online retailers both very interesting and inspiring. We can therefore give ResearchFarm our best recommendation.»*
Dagligvareleverandørerne – Danish Association of Fast Moving Consumer Goods Manufacturers

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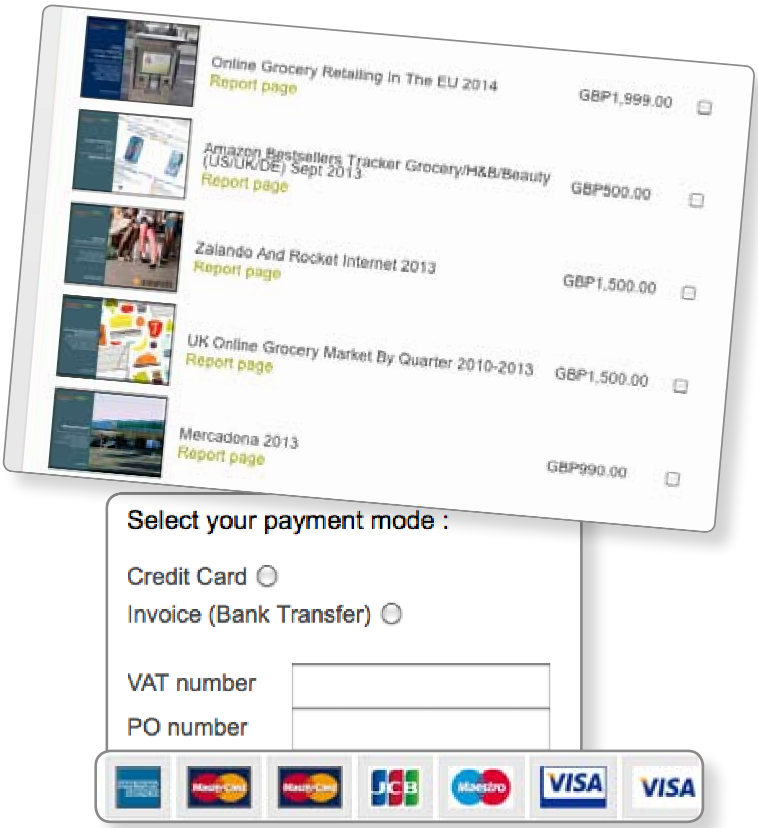


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