2019

Global Retail Trends & Innovations



Nº 14 | PRESENTED BY:

inquiry MARKET RESEARCH

Ebeltoft Group International Retail Experts

sas THE POWER TO KNOW.

inquiry MARKET RESEARCH

Inquiry Market Research is an agency specialized in Central & Eastern European markets with 15 years of experience. Our research practice is centered on shopper research, as we believe that retail success starts with consumers, who ultimately decide how and where they spend their budgets.

Our team use a wide range of innovative research methods which help to provide rich detail and meaningful insights into how people shop, what they want and what they aspire to. Our unique approach allows us to deliver a comprehensive picture of consumer life, decision-making strategies and daily challenges.

We provide answers to key questions that are directly linked to retail performance:

- Shopper profiling and segmentation
- Category management
- Catchment area analysis
- Tenant mix structure (shopping centers)
- Shopper behavior tracking
- Influence of communications channels on purchase decisions
- Online and offline shopping patterns
- Customer Journey analysis
- Retail branding, image and competitive landscape

Our research directly influences retailers' strategies, as well as those of shopping centers.

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Ebeltoft Group
International Retail Experts

We are a global alliance of consultancy companies with members in more than 25 mature and emerging retail markets.

Since 1990, we have helped retailers, as well as suppliers to the retail sector, remain competitive and achieve their goals by blending global retail expertise with our members' local insights.

Ebeltoft Group serves 36 of the top 100 retailers and 29 of the top 50 manufacturers worldwide.

Since its founding, Ebeltoft Group has been analyzing global retail innovation trends and, since 2005, presenting this analysis in our annual publication, Global Retail Trends & Innovations, focusing on emerging trends and the most interesting cases worldwide.

Ebeltoft Group´s global studies and publications include:

- Digital Impact to Retail (2018)
- Horizontal Retail (2017)
- Services at Retail (2017)
- Global Cross Channel Report (2014)
- Retail Internationalization (2013)
- Global Cross Channel Report (2012)
- NeoConsumer (2011)
- The Trust Factor (2011)
- Environmental Sustainability (2010).

AMERICAS

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Fernridge
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Retail Institute Scandinavia
ABS Architected Business Solutions
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keep it simple & smart KISSretail Management Consulting
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Ebeltoft Group
International Retail Experts

Retail Innovation Services

Partnering with retailers and brands to improve awareness of global trends that are shaping tomorrow's retail landscape.



With a decade of global retail trend analysis and more than 20 years of supporting our local retail communities around the world, Ebeltoft Group helps today's retailers and manufacturers prepare for the ongoing changes shaping the retail marketplace.

The study and adoption of innovative ideas lead to major changes in the way we see businesses go to market. It is easy to spot these changes when we reflect back on retail history. It is more difficult, but ultimately more important, to understand and react to these changes as they are happening now. Through presentations and workshops, our local Ebeltoft Group retail experts develop dynamic sessions to help your management team better understand these changes and explore the following key concerns:

- What are the main game-changing ideas that are propelling retail forward?
- How does this apply to me and my local retail market?
- How can I incorporate elements of cross-channel retailing?
- How do I incorporate new technologies into my retail concept?
- How can I think about my business model in a new way?
- How can I blend the online and offline experiences?
- How can I increase the role that the customer plays in creating and determining product?

In addition to presentations and workshops, Ebeltoft Group also provides customized trend-tracking services for your company or retail sector.

Global sponsor of Global Retail Trends & Innovations 2019




77%
of winning
Retailers rated
Analytics as
"Very Important"
to their
Retail Success

Drive results and enhance the customer experience through analytics

SAS helps you make sense of your data. As a leader in the business of analytics software and services, SAS transforms your data into insights that give you a complete perspective on your business. You can identify what´s working. Fix what isn´t. Discover new opportunities. SAS can help you turn large amounts of data into usable knowledge about your customers.



Retail stopped being just about running physical stores a long time ago. It's been over two decades since the lines between offline and online started to blur. But in recent years, the list of retail possibilities has expanded tremendously, with new players with often disruptive models popping up constantly. This has made the entire retail landscape much more complex than it was in the past. The new reality is that customers are mobile and have more control over the purchasing process – which means retailers must rethink how to use customer data and insights from analytics to know their customers better and improve customer engagement.

You can learn how to bring together all your data to connect with shoppers at every step of the customer journey. Make decisions to satisfy customers who can shop anywhere, anytime, in a personalized market. Gain a better understanding of who your customers are in order to stay competitive.

Know exactly what customers want. And make sure they get it.



SAS analytics solutions lets organizations manage interactions along the customer journey in a more personalized and profitable way.

You can:

- Efficiently rationalize assortments by becoming more customer-centric.
- Predict customer demand by channel and strategically plan key initiatives.
- Understand true omnichannel demand and use automated processes to predict sales.
- Increase margin potential by understanding historical sales through size or pack optimization.

Inspiration and further information:

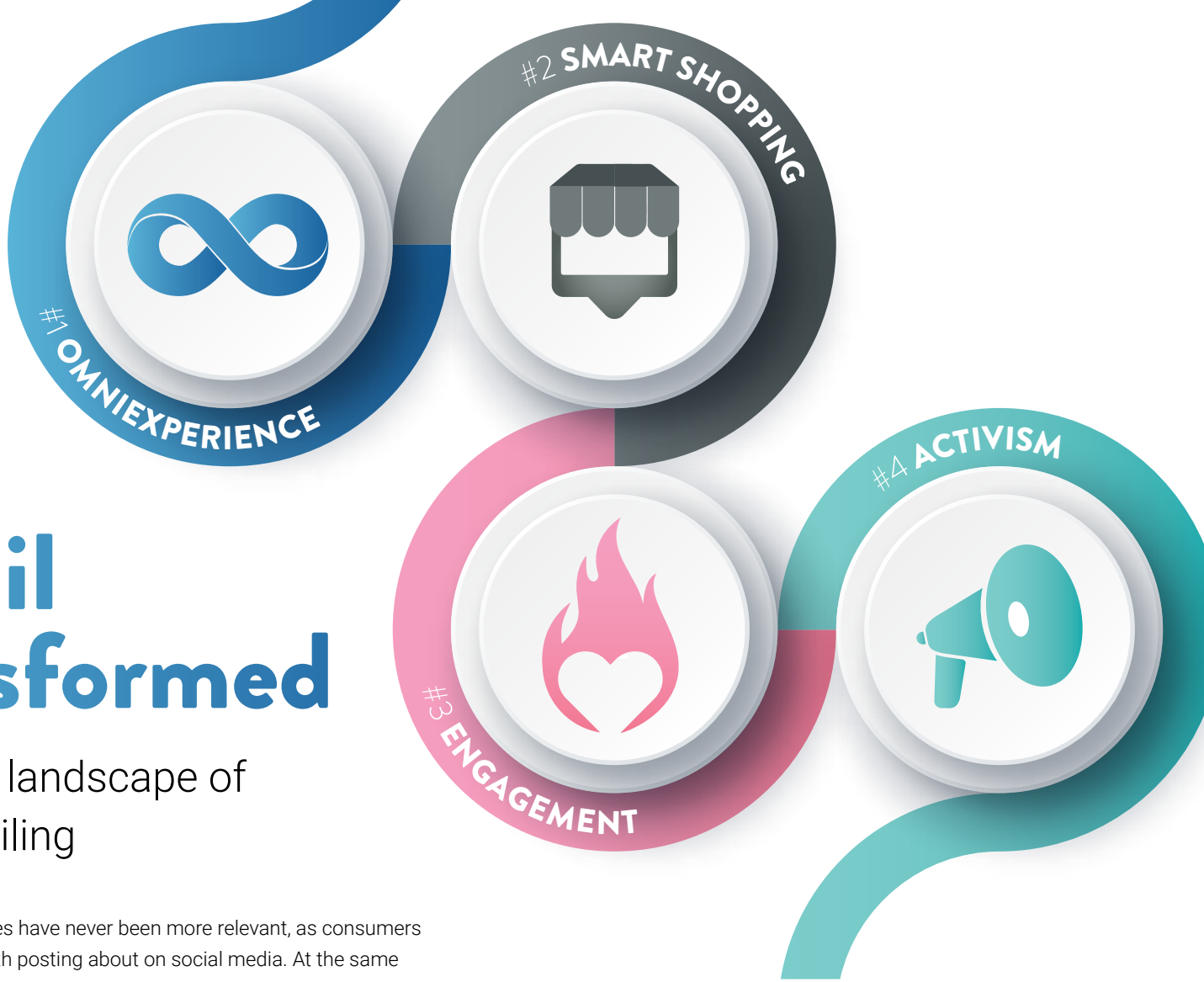
Levi´s
www.sas.com/retail/levis

Matas
https://www.sas.com/da_dk/customers/matas-en.html

Magasin
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Read more at www.sas.com/retail.

SAS® Omnichannel Analytics Powers Retail



Retail transformed

The future landscape of global retailing

Brick-and-mortar stores have never been more relevant, as consumers seek experiences worth posting about on social media. At the same time, retail has never gone through greater transformation. We see a big shift in consumer behavior and values driven by technology and new, innovative industry players, who constantly disrupt and drive consumer expectations upward. We also see a younger consumer group – Millennials and Generation Z – who grew up alongside digital transformation and now pave the way for brand new shopping behaviors and values. Now, online is fully integrated into consumer life and technology innovations are constantly improving shopping experiences across channels. IoT and artificial intelligence are breaking ground for ultra-personalized shopping experiences, where new disruptive waves – such as voice-activated shopping – again turn shopping behavior upside-down.

Change is happening fast. Experiences are paramount for physical retail, as busy consumers assess the value of the store experience based on "time saved" vs. "time well spent" parameters. In other words: Retailers and brands must be either worth spending time with or save consumers time. The moment for innovation is now.

TRENDS TO WATCH IN 2019

Ebeltoft Group has been monitoring brand and store innovations for more than a decade, uncovering trends both underlying and emerging in modern retail. Our retail experts around the world join forces to share insights from their local markets that will inspire your ideas to innovate and future-proof your business. We have evaluated more than 40 innovative cases from more than 18 countries, revealing four different retail trends to create a detailed big picture of what's to come.

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Award-winning innovation case

China

Hema


蔬菜专区

China

Hema

Hema is a supermarket that functions as a retail – as well as a fulfillment – center for online shopping. It looks and feels just like a regular supermarket, as well as a restaurant and fresh seafood market. Hema fulfills the needs of online shoppers by having in-store staff pick up orders and deliver them in 30 minutes. One key feature is the fresh seafood section, where shoppers can choose their seafood and have it prepared and cooked in-store. A section for dining allows shoppers to consume what was chosen and cooked.

At the store, shoppers are able to shop as they do in other supermarkets, but with the mobile app, details about the food product and other similar/related recommendations are made available.

Hema merges offline and online shopping experiences by satisfying Chinese shoppers' needs. Using the data collected from every shopper, Hema studies consumers' shopping habits and individual preferences. Shoppers also engage in the shopping experience through seamless payment. Hema is able to retain its satisfied customers for future visits.

The retail store is also a concept store for touch-and-feel experiences, especially for Chinese consumers.

KEY DATA

Country: China

Retailer: Tmail (Alibaba)

Format: Automated and technology supermarket, loop of online-offline supermarket

Website: tmail.com.cn

While satisfying shoppers with offline/online strategy, it also restrategizes its operations by integrating fulfillment into the retail store, eliminating the need for warehousing.

One major innovation is the use of mobile apps to track literally everything in the store: customers' time and food, where the food is kept in a vending machine, and the payment process.

WHY IS IT INNOVATIVE?

- **Integrated retail store and fulfillment center**
  In a cost-sensitive business environment, it is critical for businesses to streamline their operations while maintaining, or even improving, the overall customer experience within the supermarket. Hema combines both the retail experience with the online fulfillment center into one consolidated venue. It brings seamless experience for retail customers and efficient service delivery for online customers, since all its locations are situated near customers' locations.

- **Redefinition of one-stop shop**
  While the supermarket shopping experience will very much remain as it is in most situations, Hema created an experience that redefines the term "one-stop" shop. Not only can customers buy fresh produce and seafood, they are given the opportunity to eat at an in-store restaurant, much like having their meals cooked after their grocery shopping is completed. Such a concept brings customers back into the store repeatedly, creating stickiness in customer loyalty.

  With the use of the mobile app, the store is able to analyze the shopping trends of customers, who are engaging actively with best-buy or special deals as they walk through the aisles.

- **Active customer engagement**
  The use of mobile apps is integrated with the shopping experience, online and offline. Customers can whip out their mobile devices and scan the items they want to buy when they are in-store. Via the mobile apps, the store can provide recommendations and suggestions to the customer to guide selection among other similar options. Each of these selections can be placed in the virtual shopping cart and e-payment and delivery of their groceries to a consumer's home within 30 minutes can be arranged.





Ebeltoft Group Expert Comment

Hema has the ability to integrate retail experience without interfering with fulfillment operations for online orders. Integrating two distinctive functions brings operational efficiency and baseline profitability.

Another aspect of innovation worth mentioning is how it redefines and changes customer lifestyle, thanks to speed and instant satisfaction in a single location, while giving customers high-quality products and services. It also captures and analyzes customer shopping preferences and provides recommendations via the mobile apps, providing choices for the customer.

The seamless transaction gives customers time to enjoy the service and shopping experience at the store.

Trend #1

EVERYWHERE COMMERCE | DIGITAL & PHYSICAL FUSION | GENERATION Y & Z

Omniexperience

The rapid change in retail is especially driven by new technological and digital opportunities that put constantly connected consumers in the driver's seat and inspire the emergence of "everywhere commerce": shopping anytime, anywhere and any way consumers want, including in physical stores, online, via mobile or voice activation, or click & collect.

Physical and online/digital universes are no longer separate entities, but complementary universes that customers, especially Millennials and Generation Z, do not consider two separate channels. Instead, they expect a complete shopping experience in a fused digital/physical reality outside of "channels," supplanted by omniexperience. Today, retailers must create customer experiences that, viewed through customers' lenses, are smooth, seamless, integrated and consistent.

Customers do not distinguish between digital and physical – why should you?

An omniexperience melds online and physical universes for the convenience of the customer. Click & collect is the classic example, where customers can order online and pick up in-store at the preferred location and time, as well as order online and return or exchange products in-store. In addition, customers can choose items online to try in a physical store, or order and pay for food and drinks online to be picked up quickly in-store. It can also mean interacting digitally in-store, e.g., via augmented-reality assistants that lead you to the product, ordering out-of-stock items for home delivery, seeing customer reviews in-store, etc.


#OMNIEXPERIENCE

Spain

IKEA

After two very successful pop-up shops and an equally successful temporary store focused on bedrooms (see Retail Innovations 2018), IKEA opened a permanent urban concept in Madrid's city center on June 10, 2018. One of six international pilots of IKEA's "store of the future," the company will use it to test new concepts of stores designed to be in city-center locations.

The store, dedicated entirely to the living room, is 2,000 sqm on three floors, shows 1,000 physical products and sells the full range onsite via online tools.

On the ground floor, the product display is a tribute to Madrid, with four living rooms inspired by charismatic neighborhoods around the city. There is an area dedicated to novelties, which opened with the worldwide launch of a collection that celebrates IKEA's 75th anniversary. It was exclusively available at this new concept for a short time. Another area shows IKEA's most successful pieces of furniture for the living room and how to customize them.

KEY DATA

Country: Spain

Retailer: IKEA

Format: Urban store with a greater entertainment focus

Website: www.ikea.com/ms/es_ES/campaigns/tienda-goya/

On the lower floor, the main area is occupied by "5th floor neighbors," a series of four living rooms storytelling about their inhabitants, their lifestyles and how they designed their perfect living room. There is a "Salon Lab" (living room lab), in which customers are guided by expert advisors to design their dream living room in five steps.

On the top floor, there is a market-style area to buy smaller products (e.g., candles, flowers, frames, jars, etc.); there is a textiles area, where fabrics can be made to measure or customized for your living room; areas to host workshops; and a café and Swedish food shop.

WHY IS IT INNOVATIVE?

- **Services**
  In contrast to IKEA's traditional DIY philosophy, it is a huge innovation to adapt its business model to a new "you shop online, we will prepare your order and deliver it to you" concept (The standard stores and business model encourage customers to do virtually everything themselves.) Services become part of the offering.

- **Proximity**
  This format is IKEA you can walk to while doing other things in the city.

- **Entertainment**
  The store offers a high level of entertainment. The usual trip to IKEA for inspiration is taken a step further by engaging customers in many different ways:
  - Lots of storytelling on the product display reflecting specific local neighborhood styles. Customers feel they are "snooping" into neighbors' lives – not just their rooms;
  - Teaching customers to customize their own products.
  - Customizing products for customers.
  - Hosting events (such as living room concerts) and workshops.
  - Giving customers expert advice on how to decorate.
  - Fun and dynamic visual merchandising, displaying products: physically, on screens, via projections.





Ebeltoft Group Expert Comment

This innovative urban concept is new proof that IKEA is great at engaging with customers. Now that IKEA products can be bought online, they offer customers a new, more exciting, unique experience at this store, which has been specially localized for Madrid consumers, and is much closer to them, as customers demanded. Digitalization is used for both making the full range accessible and delivering a higher level of entertainment, inspiration and brand engagement at the store.

It also responds to shoppers' requests for free-flowing foot traffic – no more compulsory IKEA path to follow.

Romania

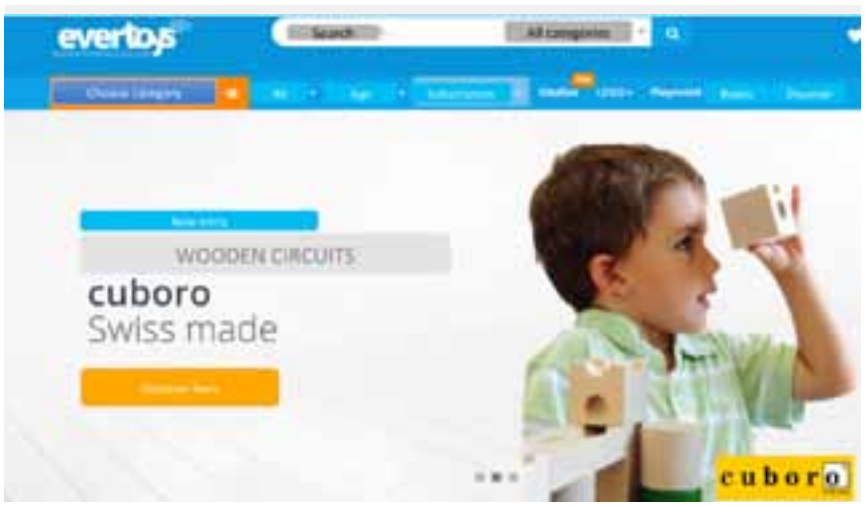
Evertoys

The three young founders conceived this toy and game rental business while studying for their MBA and launched with a 55k € investment. The toy-rental site is a flat-fee subscription service enabling parents to provide meaningful, diverse, fun learning experiences for their children. Focused on educational and STEM toys, the system targets medium- and high-income urban families with children aged 1 to 14.

Evertoys offers Basic, EduBox and Supertoy subscriptions:

- A level that gives access to a certain number and types of toys chosen for the client's next Evertoys box.
- An option for a prepackaged box of premium selected games and toys for educational and science activities for children aged 2 to 8 years.
- Monetized marketplace for toys and toy-/children-related goods, including acquisition of used toys from the clients.

Evertoys aims to be the region's leading toy-and-game rental provider, excelling in diversity, ease of ordering and good customer relations.



KEY DATA

Country: Romania
Retailer: Evertoys
Format: Online shop
Website: www.evertoys.ro

WHY IS IT INNOVATIVE?

- **Everchips**
  For each subscription level, the client receives a certain number of credits, which can be used for selecting toys. Unused credits go into the vault for later use, or can be used to earn bonuses from other business partners.

- **STEM box**
  Subscription to games and toys dedicated to children's education and development in the field of science, technology, engineering and math (STEM). The customer pays a monthly fee and Evertoys selects one to three STEM toys, games or books and sends them automatically to the customers, every four to six weeks. Each box includes a surprise for the customer.

- **Buy-back system**
  Evertoys offers buy-back service for toys and games, even if the customer is not a subscriber. The process is very simple and quick: the client takes pictures of the products, Evertoys evaluates the toys and sends the offer within 24 hours. If the customer agrees to the price, Evertoys loads Everchips into the client's account. The service is completely supported by Evertoys.





Ebeltoft Group Expert Comment

The toys are differentiated by high quality, since a product can be rented only three to four times, after which it is removed from the rental circuit and either donated or kept for spare parts. For each subscription, customers can get loyalty credits and donate them to disadvantaged children.

The platform is user-friendly and offers a wide-ranging selection of toys, grouped by age category, subscription type and brand, allowing customers to easily select the preferred products, without spending time shopping in stores. The child can keep a toy as long as he/she wants, since there is no return deadline. (The toy can be kept, while the parent maintains the subscription.) Also, Evertoys offers free delivery, regardless of the type of subscription.

U.K.

Tom Ford Beauty

The first stand-alone store comprises six specialized rooms and features grey glass, marble counters, mirrors and technology. Fragrance, color and grooming have dedicated rooms within the two-level boutique. Features include mirrors that record your make-up tutorials and email them to you and virtual lipstick trialing. There is a personal scent laboratory, where customers can have a customized fragrance appointment to sample the Private Blend collection. There's also a private make-up room for master classes and bridal services, a VIP event space for private make-up and fragrance sessions and a grooming room for men.



KEY DATA

Country: U.K.

Retailer: Tom Ford Beauty

Format: Offline

Website: www.wallpaper.com/lifestyle/tom-ford-beauty-store-london

WHY IS IT INNOVATIVE?

- **Fun with fragrance**
  The way the customer interacts with the scents and the displays featuring scents are unique.
- **Savvy screens**
  The digital displays will only show up on the screen when you are about to approach or pick up a product.
- **Personalized experience**
  Mirrors can record make-up tutorials, which are emailed to the customers, along with a shopping list of products used.
- **Scent styling**
  Interactive scenting installation, where guests can explore and experiment with the Private Blend Collection, and a bar for scent styling.
- **Learning about lips**
  Customers can virtually try on shades from the lip collection.



Ebeltoft
Group Expert Comment

Digital features are embedded well into the store and customer experience. For example, when a customer approaches a specific perfume, the digital screen will display information about that specific perfume, or when a customer is getting make-up done by a salesperson, the tutorials and products used are recorded and can be emailed to the customer.

As digital features can always be separate from or within the store, these are very visible to the customer and used to enhance engagement.

While it isn't particularly large, as Tom Ford's first beauty store, it still covers all aspects of beauty and is both functional and reflective of the brand's aesthetic.

Brazil

Omnistory

Omnistory is more than a point of sale or e-commerce store. It is a lab platform which provides new concepts and innovative solutions focused on retail. The store offers an omnichannel experience, with customer facial recognition, showing different content and promotions based on age and gender, as well as enables click & collect services and mobile payment systems. Digital and RFID labels, providing price, information and special features in digital monitors, are located around the store. The store also offers a VR experience.

People: Assisting the client on the journey to guarantee a personal and memorable experience.
Results measurement: Monitoring the consumer's behavior and operations performance through a face recognition tool.
Sustainability: A sustainable and purposeful store that goes beyond the business transaction.
Digital activation: The physical store operation is the same as the online environment in an integrated and fluid way.
Design: Integration of every single digital experience in a modern and flexible environment that changes throughout the year.
Technology: Offering the best purchasing experience to consumers. Integrating different channels. Productivity improvement.



KEY DATA

Country: Brazil
Retailer: Omnistory
Format: Omni store
Website: www.omnistory.com.br/

WHY IS IT INNOVATIVE?

- **Innovative solutions**
  Omnistory is a lab platform which provides new concepts and innovative solutions focused on retail.

  All tech solutions were designed to support overarching business management, providing different KPIs through the most advanced digital resources:

  - digital signage
  - facial recognition
  - RFID smart labels
  - mobile check-outs
  - VR experience
  - pick-up in store
  - click & collect
  - vending machines and lockers.





Ebeltoft Group Expert Comment

The Omnistory project was developed and designed so that retail brands could have a real omni-retail laboratory. The concept of the "store of the future" is operating within a shopping mall in São Paulo and is the most advanced integrated retail project ever developed to meet the omni consumer.

Omnistory completed one year of operation in August 2018 and has already inspired large retail chains to develop digital stores in Brazil. Omnistory is a milestone for Global Retail.bn

U.S.A.

Brandless

Brandless launched in 2017 as an online store that sells everything, including organic and specialty goods, for $3. As a new e-commerce startup offering a wide assortment of own-brand household and food items, Brandless can add value for the consumer by selling quality merchandise without a so-called "brand tax." Instead of a big logo emblazoned on a product, the actual attributes of it are listed on the package. Much like other direct-to-consumer startups, such as Everlane and Warby Parker, Brandless wants to cut out the hidden middleman mark-ups from many national brands in grocery stores. Brandless also abides by its own set of values when manufacturing products. All food products are non-GMO and preservative-free, while beauty products do not contain harmful ingredients, such as parabens, phthalates and sulfates. Founded by serial entrepreneurs Tina Sharkey and Ido Leffler, Brandless has so far garnered $50 million in funding and is set to grow quickly, providing consumers an alternative to Amazon.



KEY DATA

Country: U.S.A.
Retailer: Brandless
Format: Online and pop-up
Website: www.brandless.com

WHY IS IT INNOVATIVE?

- **Cost innovation**
  Brandless sells bundles of products, making it easier to take care of needs in one click, at a low cost of $3. Membership eliminates shipping costs and removes the friction of price-comparison shopping.

- **Convenience driven**
  Its online-first platform reflects the current convenience-driven era of shopping and its mission statement seems tailored to connect with a value-driven Millennial demographic. Add to that Brandless' partnership with Feeding America (a meal is donated for every Brandless order) and it's a pretty convincing option for busy, health-conscious consumers who want to feel they're making a difference.

- **Experimenting with bricks and mortar**
  The pop-up did a spectacular job of educating customers on why its products were different. Brandless emphasizes value and values, making the point that this is not generic product. In fact, Brandless has a very strong brand ethos. The store featured a full table, as an example, of vegan products, another of gluten-free and another of organics. The range was impressive and Brandless has broadened its reach into beauty products, again, at a $3 price point.







Ebeltoft Group Expert Comment

Brandless is rewriting brand narratives by selling plainly packaged, high-end staples. Consumers, overwhelmed by choice and conducting chaotic lives, are fatigued by the narratives brands have constructed about themselves. Brandless has taken a bold step forward in reconciling the paradox of choice for consumers. If it can create this much energy around commodity products, we are intrigued to see how it can expand its lines further.

Brazil

PIER X

Pier X is a multi-purpose space based on technology and proposition.

The shopping experience is facilitated by the Pier X app, which allows a credit card or money to be exchanged at an ATM located at the entrance, converting it to digital credit.

Clothes, accessories and other products can be scanned and paid using a QR code printed on the label. All services, like yoga or guitar lessons, or a cup of coffee at the coffee shop, may be ordered via the same app. The customer can order a cup of coffee even before reaching the store.



KEY DATA

Country: Brazil
Retailer: Pier X
Format: Phygital marketplace
Website: www.pierx.com.br

WHY IS IT INNOVATIVE?

It's a store; it's a meeting point, it's a coffee shop, it's a phygital marketplace.

- **Phygital marketplace**
  More than a simple space, Pier X describes itself as not just one of the first phygital marketplaces, but as a phygital marketplace with a proposition. All brands displayed in the space are based on the concept of a healthy and sustainable lifestyle.

- **Flexible space**
  From clothing to surfboards, from yoga to guitar lessons, Pier X is a flexible space that can be used for rock performances, speeches, or other events, and can be rented for these uses.

- **Innovative payment system**
  One of the essential features of the space is that neither money nor credit card can be used to pay. All is purchased using the Pier X app. An ATM system at the entrance converts real money into digital credits for use in the space.





Ebeltoft Group Expert Comment

It's not about what retailers see, but about how customers do: The most impressive thing about Pier X is real omnichannel experience, using the phygital marketplace concept to describe it, but with a technology that worked well during our experience test.

It's when you join this new experience with a surfer-rocker-healthy-sustainable lifestyle that you create a unique scenario that seems complex all together, but makes sense when you are really enjoying the space. You can have a coffee, a guitar lesson, and then use the same place to relax or study. It's almost an everyday-needs space.

Technology is just a way to make it all happen. Moreover, it works. As they say, it's more than a store. It's a culture.

Brazil

Ponto Frio

Via Varejo is the biggest electronics retailer in Brazil, with approximately 1,000 stores nationwide featuring two brands: Casas Bahia and Ponto Frio.

The company has developed a new format, more compact, efficient, connected and sustainable.

Launched in January 2018 as a lab format of the Ponto Frio store, with 170 sqm, it definitely signals a paradigm shift in the market. It is digitally connected, showcases more than 1,500,000 SKUs available on the web, offers click & collect, a multi-skill team and numerous experiences to the consumer. VR, test drive of products ready for trial, face recognition and full analytics are possible.



KEY DATA

Country: Brazil
Retailer: Ponto Frio
Format: Compact and digital
Website: www.pontofrio.com.br

WHY IS IT INNOVATIVE?

- **A range of innovations**
  It is innovative in many ways. The company is testing software enabling face recognition and turning insights into action, as well as using satisfaction results to remunerate staff. Ponto Frio learned that technology enhanced store operations beyond the buzz it caused in the media.

  In addition, technology-facilitated engagement by store associates creates a personalized shopping experience. A customer can be orientated by AI, have a VR experience, click & collect and access more than 1.5 million items powered by the marketplace.

  Also, there is space dedicated to the trade, where industry representatives can show new arrivals and demonstrate them to the public.







Ebeltoft Group Expert Comment

Ponto Frio Digital was the very first initiative undertaken by the company to create a lab thinking store, ready to test and learn about many technologies to build a relevant in-store experience, as well as operate efficiently, doing more with less space, people and inventory.

The goal has been reached so far. With this new format, the store earns the same revenue as a traditional model, with three times more space and twice the staff. Bottom line, the new format has proven to be an enjoyable experience for buying and selling.

Portugal

Worten

In late 2016, Worten presented a new 5,000 sqm store concept aimed at reinforcing its innovative image and improving its omnichannel shopping experience. The ambiance was conceived to persuade the consumer to spend time discovering what's new and best fits his or her needs among physical and digital products. Aisles, furniture, lighting, temperature and "expert points" (desks where customers and expert advisors meet) are designed to make shopping at Worten fun and informative, with areas to try products such as gaming devices, drones or DJ equipment. Worten's promise is that items purchased online or through the store's digital catalog can be picked up within two minutes at click & collect counters. The after-sales area, Worten Resolve, adds value to the experience by having certified technicians repairing smartphones, computers and household appliances on site, even if it was not bought at a Worten store.

Across the Worten network, including at smaller formats, all products can be ordered via digital catalog and received in another store or at the client's own home.



KEY DATA

Country: Portugal
Retailer: Worten
Format: Store and online
Website: www.worten.pt

WHY IS IT INNOVATIVE?

- **Details are an asset**
  Everything is thought out in detail at the Worten store, from the innovative image to the living environment, decor, expert points, product test areas and pick & collect points. The role of after-sales, with Worten Resolve as a business area that provides expert assistance even to those who did not buy from the store, is also a huge asset.

- **One-stop convenience**
  Having everything inside the same store: concentrated display areas, experimentation, conversations with experts (at "expert points") and Worten Resolve motivates the consumer's desire to shop Worten.

- **Digital catalog simplicity**
  Thanks to the digital catalog, the omniexperience can be lived with an order completed in smaller stores (or, if an item is unavailable in that store, via the catalog) with pick-up in another store or received at home.





Ebeltoft Group Expert Comment

The new environment of the Worten store has revolutionized the customer's willingness to stay in the space and try out new products in specific areas.

By concentrating exhibit areas, experimentation, conversations with experts ("expert points") and Worten Resolve, the space can respond to all the needs of each client.

By responding to the information needs of clients at "expert points," customers' confidence is reinforced.

The fact that Worten Resolve accepts products even if they are not from Worten helps to create loyalty and more connection with potential customers. As a business area, it generates more margin and revenue (usually the technical assistance area does not have this added value). Buying online and collecting here is now easier and faster in the click & collect area.

France

Envie de salle de bain

Cedeo brand was originally a B2B bathroom and plumbing brand. By opening a new type of showroom, called "Envie de salle de bain," Cedeo wants to target not just craftsmen, but also other contributors to this type of project, such as architects and end-users.

The showroom is 500 sqm and comprises areas including:

- Projects: 10 bathroom displays, shown by theme, to accommodate all budgets (from 1,000 to 20,000 €) and all types of end-users (single, large family, elderly people, etc.).
- Advice area: A dedicated area for all contributors meetings.
- Product display: Products are displayed in a flexible merchandising format, making it possible to take them from shelves.

Contributors can also use 3D software on digital devices to model their projects and simulate some items, like floor tile, that they find on display.

On the Envie de salle de bain website, contributors have access to 3D software and can request a project estimate.



KEY DATA

Country: France

Retailer: Saint Gobain Distribution – Cedeo

Format: Bathroom showroom

Website: www.enviedesalledebain.fr/

WHY IS IT INNOVATIVE?

- **A showroom where all project contributors can interact**
  Remodeling or building a bathroom is a complex project with different contributors: architect, craftsmen, suppliers and end-users.

  Envie de salle de bain creates one place where all these contributors can meet and co-create the project.

- **Good balance between digital devices and samples**
  Envie de salle de bain offers digital innovations, like 3D software, in the showroom. Customers can also take samples from shelves, thanks to flexible merchandising.

- **Envie de salle de bain becomes a work tool for craftmen**
  In this new place, craftsmen can show their progress to their end-users and help them plan and have confidence in their investment.







Ebeltoft Group Expert Comment

By opening Envie de salle de bain, Cedeo created a new type of B2B store, where all contributors (end-users, suppliers, craftsmen) can interact and together build the project.

The store is more than a place just to buy products or just a showroom, but is a place to make progress on a project with all contributors involved. Customers can interact around the project with expert sellers, get inspired and project results with 3D modelling.

By providing all these opportunities to craftsmen, Cedeo wants to reinforce their loyalty and become a network of shops inspiring specialists and end-users.

Poland

eobuwie.pl

Polish online footwear retailer eobuwie.pl has opened its first concept store in a shopping mall in Wroclaw; more are planned. Eobuwie.pl is owned by CCC, Central Europe's largest footwear retailer and the largest footwear manufacturer in Europe. Eobuwie.pl's brick-and-mortar store debut presents a different purchase journey than a traditional retailer: the store has no physical product on the floor and is supported by a vast stockroom for a free-flowing experience mirroring its online service. A pair of digital screens next to the entrance draws shoppers and the entrance is designed for quick transactions, with high stools and interactive touchscreen tablets, where customers can search and order. Products are delivered within three minutes from a warehouse behind the check-out line. For customers seeking a slower journey, the heart of the store is designed for browsing and trying shoes. Eobuwie.pl offers a wide selection – some 450 brands and 40,000 styles. Digital displays replace traditional visual merchandising, delivering a sleek, minimalist environment and unique, seamless customer journey.



KEY DATA

Country: Poland
Retailer: eobuwie.pl
Format: Online and brick-and-mortar store
Website: www.eobuwie.com.pl/

WHY IS IT INNOVATIVE?

- **Transformative, seamless experience**
  A transformation from online store to physical experience.
- **Easy to purchase**
  Allowing consumers to experience online purchases in a brick-and-mortar environment, addressing key purchase barriers.
- **Different purchase journey**
  The store has no physical product on the shop floor and is supported by a vast stockroom for a free-flowing experience mirroring its online service.
- **Upgrading to digital**
  Digital displays replace traditional visual merchandising, adjusting products displayed to what is being browsed.





Ebeltoft
Group Expert Comment

This concept shows that online needs offline as much as the other way around. Consumers are reluctant to buy shoes online because they are not sure if they would like them and what to do if not. To address this, eobuwie.pl allows people to experience an online purchase supported by very friendly floor staff. The whole concept is designed to make the purchase as efficient as it gets. Shoes also can be delivered to a customer's home.

Italy - Milan

Huawei

In Italy, the smartphone market turnover shows no signs of diminishing.

Huawei, the Chinese telecommunications giant and the world's third smartphone manufacturer, is present with products and services in more than 170 countries. Huawei chose Milan, Italy, to launch its first European flagship, opened at the end of 2017, with an Italian retail design.

The store is located in the prestigious CityLife shopping district, in the heart of Milan, the largest urban mall in Italy.

In line with the core message of the brand, "Make it possible," Huawei has created an experience hub where customers, in addition to trying out the brand's novelties, can live their passions, such as attending courses, finding companions for a race, teaching their children coding and more.

The petals of the Huawei logo are presented visually in different ways: on the tables, with LEDs (which the customer can change in color while waiting for his or her turn), or as a graphic motif that runs along the floor. The furniture is dominated by light colors, the walls are in wood or decorated with vertical gardens and the back wall is made up of a giant LED wall with rotating views and images that create ever-changing scenes and atmosphere.



KEY DATA

Country: Italy - Milan
Retailer: Huawei
Format: Flagship store
Website: www.huaweiexperiencestore.com

WHY IS IT INNOVATIVE?

- **"Lively" walls**
  It is a technological store with smart walls that speak multiple languages. The store windows, through customer smartphones, animate stories, such as, for example, a Christmas advent calendar in digital form.

- **Symbols and symbiosis**
  The interactive garden symbolizes the connection between life and technology, where real plants coexist with LED flowers. There is also symbiosis in a green floor featuring a new technology built on a flexible circuit that can transform people's traffic into electrical energy.

- **A broad offer**
  The team is trained and qualified, available to consult, and can be booked online or during events with special guests. Among the services organized are free courses conducted by experts from different sectors, by reservation, designed for all age groups and interests (e.g., photography, sports, languages, arts, coding). The courses also can be booked in-store or on the website.

- **A personal touch**
  Thanks to the trade-in service, the customer can have his or her old smartphone evaluated and, if suitable, exchange it for a voucher to be spent immediately on a new purchase. Also, the smartphone, tablet and PC can be personalized in 10 minutes in a "tattooing" area via a touchscreen panel, which facilitates a guided procedure. The customer can personalize his or her device (smartphone, tablet or laptop), printing on a cover or directly on the object. Drawings or one of the available themes, consisting of embossed elements and text, can be added (e.g., a name, motto or initials).





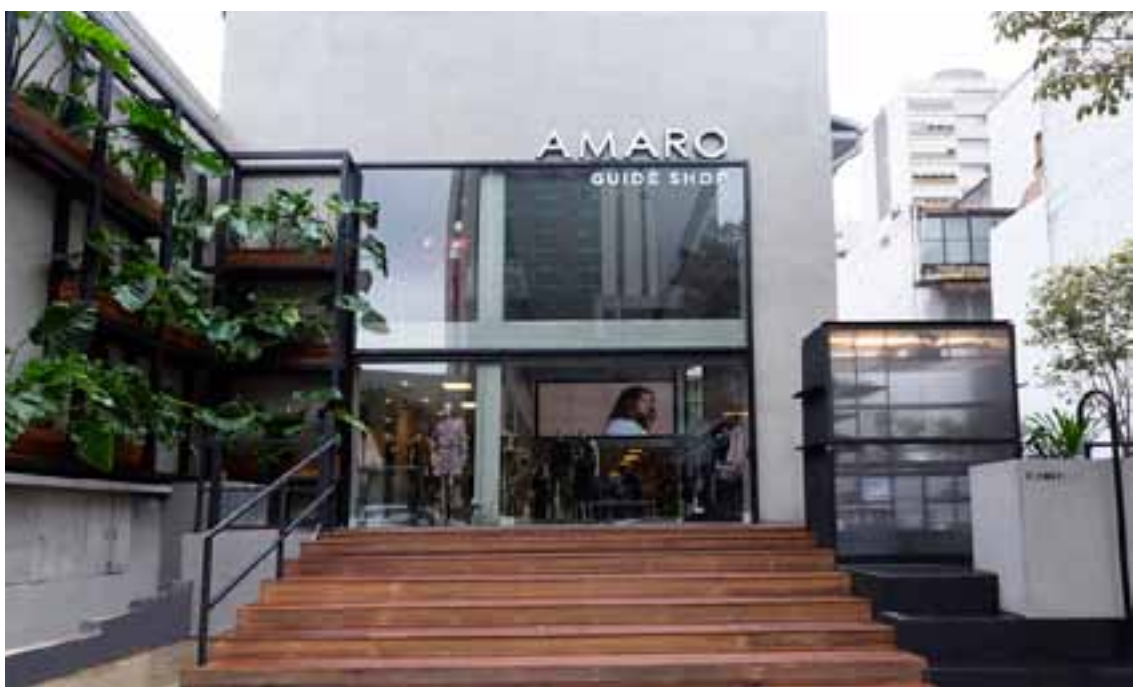
Ebeltoft Group Expert Comment

Huawei decided to open its first flagship store in Milan, choosing the prestigious and innovative setting of CityLife. The goal, which has been achieved, is to communicate the values of innovation and research associated with the brand and products. Hauwei has developed the concept, emphasizing the emotional aspects of the retail experience. Its challenge will be to maintain the high standards that characterized this first phase of opening.

Brazil

AMARO

Amaro defines itself as a digitally native fashion brand that innovates through technology and creativity to change the way people relate to fashion. It innovated being the first Brazilian brand direct-to-consumer model using large data sets, (e.g., what fabric is preferred, what skirt length women like most), to plan more targeted collections. These are sold online and in Guide Shops, a physical store similar to a showroom with only one piece available in-store for each product model and size. In the Guide Shops, the brand uses face-to-face interaction as a complement and for client convenience. At the store's tables, consumers find iMacs and iPads instead of a cash desk, all transactions are completed online. You can also scan a product's barcode and buy via your mobile app. Amaro provides same-day delivery for São Paulo to increase conversion rates and provide an excellent consumer experience.



KEY DATA

Country: Brazil
Retailer: AMARO – Fashion
Format: Online + 12 Guide Shops
Website: www.amaro.com

WHY IS IT INNOVATIVE?

- The first brand to test and have Guide Shops in Brazil.
- Collections are planned based on cross-checked data.
- Same-day delivery for Sao Paulo and D+1 for capitals like Rio de Janeiro and Curitiba.
- All transactions must be completed online, via app or website.





Ebeltoft Group Expert Comment

AMARO was the first Brazilian brand to implement Guide Shops in Brazil. It convinced malls about the model and persuaded consumers that they could buy, but not have to take home, purchases. Clients would receive their purchases at their homes on the same day in Sao Paulo and, in other main cities, Day+1.

Another exciting aspect is that AMARO is a technology company that sells fashion. It plans more collections based on data collected through physical stores, app and e-commerce.

China

Hao Mai Yi

HaoMaiYi is a technology vendor specializing in the use of artificial intelligence (AI) technologies in the retail industry. Currently working with more than 100 brands, including major brands like Marks & Spencer, Guess, and Massimo Dutti, its technology goes beyond the traditional augmented reality. The technology surrounds the users (shoppers) by bringing them into the augmented world through the use of a touch-sensitive mirror and embedded artificial intelligence engine. The technology requires some data entry on the user side, using the data to create an artificial silhouette of the shopper in 30 seconds.

Combining the data, the AI engine, as well as the products (e.g., clothes, cosmetics, etc.) database, the whole technology can effectively show the outcome of a certain outfit on the person's body based on his or her augmented reality form. At the same time, the engine also will provide personalized recommendations of other related outfits suitable for the shopper. This technology creates a virtual fitting room connected to the database of available outfits without physically having the entire series of designs available at the retail store. It allows the shopper to try on any garment available in the virtual dressing room.

KEY DATA

Country: China

Retailer: Various retailers (e.g., Massimo Dutti, Bershka, Pull&Bear, Guess, Marks & Spencer, etc.)

Format: Artificial intelligence

Website: www.haomaiyi.com

This has helped retailers to ensure sales throughput without causing inconvenience to the shopper, and at the same time upsell/outsell without human intervention.

For more discerning shoppers, the technology allows the shopper to download the augmented images into mobile apps to reuse and consider the purchase.

With this technology connected to the e-commerce platform, shoppers can also make the purchase via the online store.

WHY IS IT INNOVATIVE?

- **Enhances customer shopping experience**
  Online shopping is made more realistic using augmented technology featuring more than 100 name brands. Customers now can visualize themselves in the outfit via the mobile apps at the retail store, which creates a virtual fitting room at a customer's fingertips and connects the customer with the retail shop in the in-store fitting room. These technologies bring unique experiences to customers, connecting online and offline.

- **Matching customers' shopping preferences and trends automatically**
  Online shopping is made more realistic using augmented technology. Customers now can visualize themselves in outfits from various brands and decide if the selection is suitable. Personalized recommendations are also proactively provided to complement the selected outfit to upsell. All are made possible by the artificial intelligence engine.







Ebeltoft Group Expert Comment

The use of augmented reality to enhance product offerings for customers inspires refreshing experience. It redefines the speed at which brands can introduce new products, without having to stock physical items at each retail outlet. It brings the store to customers through their mobile apps. The integration of AI brings unlimited possibilities to proactively engage customers.

Trend #2

RETURN ON TIME | CONVENIENCE | SIMPLICITY | SERVICES @RETAIL

Smart shopping

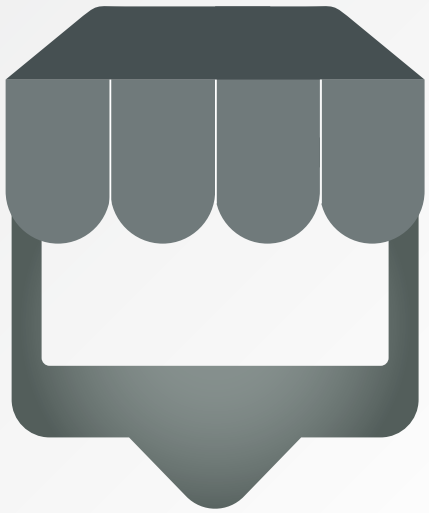
The modern consumer is busy. Millennials, especially, feel they are busier than ever. Between career, job, school, family time and social life, not much time is left for other chores. So, retailers' focus is on bringing value to the consumer and return-on-time is the new currency. Consumers look for convenience in the purchasing experience and solutions that both optimize and save time. Smart shopping makes consumer life easier, simpler and more efficient, without compromising the quality of products or the shopping experience. Retailers increasingly offer several services in one place to reinvent and increase their business and, at the same time, offer time-starved consumers simplicity by providing the opportunity to handle several errands in one place.

Smart shopping often is driven by smart use of technology and an integrated omnichannel experience. Simplicity is a key driver for saving time. In retail, it means a simple and convenient offer, often with technology as enabler. Focus is on smart in-store solutions that make the buying decision simpler, easier, faster. Optimizing the layout of the store, convenient delivery options, subscription plans, fast check-out, easy store navigation and fast, on-the-go food are just a few examples of how retailers and brands can make shopping smarter for customers.

On-demand is also a key word for smart shopping, as consumers' expectations for speed skyrocket. Most popularly, on-demand is known for services such as Netflix, Uber and food delivery, but, in retail, it also means offering consumers what they want, when and where they want it, e.g., manufacturing and producing on demand, resulting in fresh, personalized products.

This often means knowing what the customer wants, even before he or she does. Artificial intelligence and IoT are increasingly ensuring a personalized shopping experience or even ensuring products are stocked before the customer realizes he or she is running out. Personalization is key when creating a smart shopping experience, as tailored experiences and products cater to individual needs.

#2 SMART SHOPPING



China

More Mall (Alibaba)

Last April, Alibaba opened its first brick-and-mortar shopping mall in Hangzhou. The mall, 'More Mall' or 'Alimall', is where the tech company is testing its future vision on physical retail. Here, technology is not a gimmick, but provides more convenience and experience to stimulate O2O commerce (online to offline). A few concepts in the mall include the first Hema concept store, Tmall Genie and the Guess AI store. In these stores, Alibaba encourages shopping with technology on a whole new level. It's used to surprise, engage, play and create product transparency and faster shopping. The only ways to pay are via AliPay or cash. The Chinese are on their way to a cashless society and cards are no longer accepted. After payment, the customer journey continues via phone; content and media creation are continuous; influencers vlog constantly and have live conversations with customers and employees to reveal more about experiences and products. At Alibaba, the customer journey never ends.



KEY DATA

Country: China
Retailer: More Mall (Alibaba)
Format: Mall
Website: www.Alibaba.com

WHY IS IT INNOVATIVE?

- **Experience 'new retail'**
  - **Hema supermarket:** The Hema store from Alibaba exemplifies the growing O2O business model in China. Choosing online purchases is possible in-store. Customers get their shopping list from a central terminal. As soon as they have chosen their order, it is placed on the conveyor belt system in the store. The orders go to the distribution hub to be completed and shipped. The store is more than a supermarket, it's experience alongside convenience, as well as a place to dine or buy a meal on the go.
  - **Tmall Genie:** The Tmall AI lab created its own Alexa with various identities. The kids' version is as a simple as a cat that will listen to and play with kids. The interactive smart speakers start at 12 euros, based on functionalities and audio. The fun, interactive X-space at Tmall surrounds consumers with technology.
  - **Guess AI:** The Guess store in More Mall has, perhaps, the best new version of a magic mirror. Buying clothes has never been easier. This is how it works:
    - Step 1: Make a personal scan.
    - Step 2: An avatar of you is created.
    - Step 3: Make a slighter 'better version' of yourself.
    - Step 4: The mirror suggests some styles.
    - Step 5: Swipe and browse for what you want.
    - Step 6: Save your avatar on your phone in your preferred ecosystem environment (e.g., WeChat). After finishing your shopping experience, you can share it online and buy products via phone.

- **Mobile payment**
  The only way to pay is via a QR code generated on the phone and connected to an AliPay wallet. The employee scans the QR code and the transaction is set.

- **Content creation**
  Why shop at More Mall? Influencers will tell you. In the mall, vloggers constantly share live content with consumers and there is also a huge screen sharing content in real time.



Ebeltoft Group Expert Comment

This mall shows what retail can be: online-offline merged, as well as fun alongside convenience. Alibaba shows that future malls will be more than bricks and mortar, but will test new innovations and technologies in a real consumer environment, replace cards and cash and create experiences, relevant, shared content, memorable moments and lifetime engagement – not just transactions.

China

Soolife

Soolife is an online e-commerce platform that provides two levels of experience. First is the online-to-offline experience for the customer. The online mobile app enables customers to shop; the offline stores in city centers enable customers to experience services and products hands-on. Centrally clustered offline stores serve customers as a one-stop experience, offering a hair salon, bakery, playground and gaming area for children, fitness/yoga room and nail salon, with many more possibilities.

In another element of experience, Soolife provides a comprehensive solution for businesses, especially small-to-medium size, to more effectively and efficiently store, warehouse, advertise, manage the physical store and perform other necessary services. Soolife consolidates services and provides buying power. What stands out is that Soolife allows and encourages startup retailers to more easily establish an offline and/or online retail environment without extensive knowledge and capital, reducing the barrier to entry for people who want to be part of the e-tail industry.



KEY DATA

Country: China
Retailer: Soolife
Format: Online-offline retail platform
Website: www.soolife.cn/

WHY IS IT INNOVATIVE?

- **Provides aggregate platform for new retail startup**
  It provides a platform for any retailer to bring offline and online e-commerce together. Similar to the concept of store within a store, it extends the experience to the online store, giving customers a one-stop shopping location. The location is chosen specifically to be close to the market. Customers can simply enjoy the day shopping for an outfit, getting some pastries and getting their hair done.

- **Creating low barrier of entry to new startup**
  With the available assistance services, SooLife is more than a platform for aspiring retailers to market their products and services. It is a platform that reduces the difficulties of running a retail business and encourages entrepreneurship, even on a small scale.

- **Co-op business model**
  Makes business owning a little easier, Soolife brings operational values to the retailers with services such as the e-commerce platform, marketing services, warehousing services and more. Such convenience allows group buying of services that eventually benefit the retailers by helping them reach their customers around the physical location and online.







Ebeltoft
Group Expert
Comment

Soolife is a platform that brings startup retailers together to form a co-op-like environment for aspiring business people. These retailers bring their products to the retail location and online platform of Soolife for immediate market access. While retailers focus on their main business, they subscribe with Soolife for marketing, warehousing and other operational services to make running business a little easier. This results in an environment conducive to entrepreneurship.

China

Tmall Automated Supermarket

Tmall Supermarket is a self-service supermarket that leverages new and existing technologies, including behavior trajectory analysis, emotional recognition and eye-tracking technology to reengineer the service experience of the shopper through service automation. It adds emotional marketing as part of the strategy to incorporate human experience.

Unlike the traditional vending machine, the technology seeks to understand the shopper's profile, including previous purchase habits and preferences, to analyze what the shopper will buy, bridging the gap between tech-only and human shopping experiences. Through understanding the trends and habits of the shopper, the system will create a convenient experience at the automated supermarket. This also gives the retailer clearer, in-depth data, providing a more accurate and optimized service to the shopper.



KEY DATA

Country: China

Retailer: Tmall/Alibaba

Format: Automated supermarket, online/offline

Website: tmall.com.cn

WHY IS IT INNOVATIVE?

- **Bringing human experience into an automated shop**
  Leveraging an existing automated system, Tmall incorporates new visual sensors, combining them with artificial intelligence technology to develop a more human experience in a totally automated retail shop. Data are used to analyze trends and behavior.

- **Analysis marketing**
  With the advancement of technologies, AI can analyze the trajectory of customer behavior, recognize customer emotions and implement eye-tracking technology. Using these data, the company can develop an environment that humanizes automated services.

- **Automated customer satisfaction**
  Using the outcomes of the analysis, the automated system can customize service and value propositions based on individual customers' moods, buying patterns and behavior. The system can predict data and make instantaneous adjustments to the service/products that will drive purchase.







Ebeltoft Group Expert Comment

Tmall's advances in automated shopping using the next level of artificial intelligence and visual sensory technologies to understand and analyze customer behavior bring about what we can expect to be a more pleasurable shopping experience. Such experience is not only for the general public, but potentially brings about customized service and a unique value proposition to each customer, tailored to each individual's behavior and buying pattern.

Germany

Saturn

Consistent with the brand's new positioning "Technik (er) leben," experiencing technology and showcasing how technology can enhance life are the main goals of the new flagship store of Saturn, one of Germany's largest consumer electronics retailers. With its 6,500 sqm, the store offers customers numerous opportunities to experience the latest trends in technology and a vast offer of consumer electronic products. The location in the city center of Cologne reflects the heritage of Saturn, which was founded there in 1961.

KEY DATA

Country: Germany
Retailer: Saturn
Format: Flagship store
Website: www.mediamarktsaturn.com



WHY IS IT INNOVATIVE?

- **Experiencing technology in a new dimension**
  The store provides diverse opportunities for the customer to experience new technologies. For example, a demo and test of noise-canceling headphones takes place in an original part of a DC-9 aircraft cabin. The home appliances department on the first floor is devoted to wellness, body care, good cuisine and healthy eating and features a show kitchen for live cooking events and related product presentations. A drone cage allows customers to experience one of the latest trends in technology at no cost. When customers enter the store, they are greeted by a 21 sqm LED wall displaying new products and fascinating pictures to showcase one possible use of this technology.

- **Shop-in-shops as an important concept**
  One typical element of the flagship is a series of shop-in-shop concepts, including a Samsung Galaxy World presenting the brand's latest products, ready for testing. Another highlight is the 3D-photo studio, where customers can take 3D pictures and get figures modeled based on these pictures. The Plattenkeller, part of the 1,000 sqm entertainment area, offers a wide variety of CDs and vinyl records. Saturn also integrated a jazz and classical music lounge and a broad selection of "Kölsche Lieder" (Cologne songs) to meet customers' desires.

- **Providing additional services**
  The 25 m service counter features a pick-up area for online orders, demonstrating strong focus on customer service. The store also offers smartphone repairs within 60 minutes and express, same-day delivery. To adapt to consumers' strong dependence on smartphones, the store offers free charging docks in its lounge. Since all customers do not find product use intuitive, instruction is available.





Ebeltoft Group Expert Comment

This store is the first to perfectly complement Saturn's new brand positioning via numerous interaction points with new products and innovations. The flagship is able to create significant consumer engagement, which is necessary for survival in the face of pressure from e-commerce.

The strong focus on customer service allows customers to make their shopping trip as efficient and convenient as possible and differentiates from online.

The Netherlands

SKIPPEN at SPAR University

With the new concept, 'skip the line and pay with Tikkie'.

SPAR University started in 2013 as the first store in the world with 100% self-check-out; now it's time for the second step in the development of simple, smart and fast shopping. SPAR University introduced a cashless concept in its stores: SKIPPEN! Open the app, choose to "skip the line" and, literally and figuratively, you skip the cash register. You scan products you want with your smartphone, which are added directly to the (digital) shopping basket and you pay with Tikkie, a payment app from ABN AMRO. Smarter, faster and easier. Finally, after skipping, you scan the QR code at the skip screen and immediately see if you receive a reward for your next visit (i.e., a free coffee or lunch). By introducing SKIPPEN, SPAR University gathers more relevant data about its customers to create smarter app deals. SPAR can also provide the customer better information about what they want to know, such as allergens present or number of calories. SPAR will have rolled out SKIPPEN in all stores by the end of 2018.



KEY DATA

Country: The Netherlands

Retailer: SPAR

Format: Convenience store – "Skip the line!"

Website: www.sparuniversity.nl/

WHY IS IT INNOVATIVE?

- SKIPPEN ensures the consumer can save the most valuable asset: time.
- SKIPPEN makes the purchasing process quick and easy. There's no hassle with complicated technologies, only scanning QR or bar codes with a smartphone.
- Collaboration with Tikkie is a win-win for both retailers and consumers.





Ebeltoft Group Expert Comment

SKIPPEN makes shopping easier, simpler and more efficient, because every consumer can use a personal smartphone. Also, SPAR provides valuable customer data, enabling a more personal approach. The cooperation with payment app Tikkie ensures the experience is embraced by the consumer. More than 2 million Dutch people have adopted this app in less than two years. Cooperation between SKIPPEN and Tikkie is a good example for other retailers. This app is simple for retailers to use and can make the shopping process for consumers faster and easier. Stores can be innovative without purchasing expensive technologies.

U.K.

Zara

Zara introduced the pop-up click & collect store while the flagship store is being refurbished. This store is the first of its kind to accommodate online orders. Customers will be able to pay via mobile phones, the Zara app and even self-check-out. It has also introduced a product-recommendation system embedded in changing-room mirrors; when a customer scans an item using radio frequency identification (RFID) technology, the system will show compatible sizes and suggest coordinating items. Customers can also receive their online orders by 2 p.m. the same day. Moving toward a more sustainable footprint, the pop-up operates on a smart system designed to reduce emissions and save money.



KEY DATA

Country: U.K.

Retailer: Zara

Format: Click & collect store (offline)

Website: www.zara.com/uk

WHY IS IT INNOVATIVE?

- There is a dedicated online area for purchase and collection of online orders, featuring two automated online-order collection points.
- For a customer to pick something up online, the customer just needs to scan the QR or pin code in the email receipt and a robotic arm will deliver it in seconds.
- There is a self-check-out area with a system that automatically identifies garments purchased.
- There's a product-recommendation system in changing-room mirrors.
- There is also a digital mirror with RFID (radio frequency identification) that can detect the garment the customer is holding, and the mirror will show how it's worn as an outfit.
- Customers can receive their online orders the same day.



Ebeltoft
Group Expert Comment

One of the first stores dedicated to click & collect.

The collect process is very quick and efficient and the customer does not need to interact with staff.

While there are digital features within the store, staff could do more to raise awareness of these features and demonstrate use.

U.S.A.

Spyce

Spyce is the world's first restaurant featuring a completely robotic kitchen that cooks complex, nutritious, tasty meals.

Located in Boston, the restaurant is the brainchild of four M.I.T. graduates based on a vision of cooking affordable, healthy food, robotically.

The restaurant offers meal bowls at low prices, starting at $7.50, prepared in an automated kitchen using fresh ingredients. Every step of the process, from mixing ingredients to cooking and serving, is automated. This allows for quick cooking - meals are prepared in under three minutes.

The restaurant features top culinary talent, as well as its fully automated kitchen, with Michelin Star Chef Daniel Boulud serving as culinary director. Boulud provides menu direction along with Sam Benson, executive chef; together they decide the menu, do the tasting and train the staff on how to enhance the customer experience.



KEY DATA

Country: U.S.A.
Retailer: Spyce
Format: Restaurant
Website: www.spyce.com