BARE INTERNATIONAL
Revealing the True Nature of Business

Fashion Retail
Trends and Challenges 2016

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in **10 OFFICES** worldwide

QUALITY
INNOVATION
PASSION

Nicole is browsing the websites of several fashion retailers. At one store's site, she identifies three models she is interested in and saves them to a "wish list". Since she prefers to touch and feel the clothes before buying, she decides to visit the store. Under an optimized cross-channel experience, she is able find the nearest physical outlet on the fashion retailer's website, get directions using Google Maps, and drive over to view the desired products.

Even before she walks through the doors, a transmitter at the entrance of the store identifies Nicole and sends a push alert to her mobile phone, welcoming her and providing her with personalized offers and recommendations based on her history with the store. In this case, she receives quick links to the wish list she has created, as well as updated prices and reviews for the items she has shown interest in (captured in her click trails on the store's website).

Additionally, she receives notification of a sale—"15% off selected accessories, today only"—that applies to two of the items she had added to her wish list.

When she taps on the wish list, the app provides a store map directing Nicole to the desired section of the store. The store uses sophisticated tagging technologies, information about the wish list items has automatically been synced with other applications on her mobile phone—she can scan reviews using their Consumer Reports app, text her sister for advice, ask Facebook friends to weigh in on the purchase, and compare the retailer's prices against the prices of others. She decides to get a dress, but as her size is not in stock, she orders it online. Two days later, when the dress is delivered, Nicole receives a message from the retailer with offers for other items tailored toward her age profile. Now, the cycle begins again.
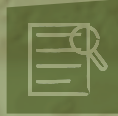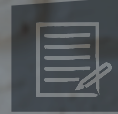
1 Executive Summary

Executive Summary

Bare Europe has performed an initial desktop research showing that fashion retail across the world is undergoing substantial change. Multiple forces are at work. In this report, we will show you different retail concepts in the fashion industry, and also in other sectors. You will discover concepts and recommendations consistent with new store formats.

WITH THIS STUDY, WE WOULD LIKE TO ANSWER THE FOLLOWING KEY QUESTIONS:

1 How is the fashion retail industry changing and what can a Brand do to adapt its strategies to the new trends?

2 What innovative technologies could enhance the sales process and result in more leads and/or higher conversion rates?

3 What are the new retail concepts that a Brand can consider in order to create an excellent customer experience and ROI?

4 What are the key building blocks to implement innovative sales techniques and new retail formats?

1 Today's customers are better informed than ever; they spend less time at the stores and expect sales staff to have a very high level of expertise. Customers use offline and online sources to evaluate products, during both the information and the decision phase. Online sales are growing, but customers expect brands to engage them in today's digital age. Fashion retail brands need to adapt themselves to this new era, where the new target audience is generation "Y". Brands need to streamline in-store and online experiences, with high-tech specialist staff and online activity analyzing resources.

What innovative technologies could enhance the sales process and result in more leads and/or higher conversion rates?

2 Across the entire customer journey, every touch point is an opportunity to engage consumers and let them experience the brand. In order to make the most of digital channels, companies need to bring the best of the online world into the store, blurring the physical and digital.

Inspiration corridor: The interactive booth offers a personalized digital experience, as it works with real-time body scan. Body scan profiling, along with what you are already wearing, combined with real time product inventory from the shopping center, the live digital shop window makes smart product recommendations.

Scannable Window Shopping: Pictures of best-selling items are shown in a window display, where customers can scan the QR code of the item they want, which then takes them to the mobile site to complete their purchase. After ordering online, customers can collect the item the following day.

Interactive Window Shopping: aA new type of 3D camera system from the Fraunhofer Institute for Telecommunications transforms simple hand and facial gestures into the corresponding inputs for selecting goods, viewing them in detail and immediately purchasing them – even after business hours.

3D interactive shopping wall: It turns walls into prime selling space. On a massive touchscreen developed by Intel, customers can swipe through endless collections with just a touch of their fingertips. The 3D wall is particularly profitable for small retail stores, avoiding the necessity for huge inventory.

5D Experience: Procter & Gamble launched a new concept store where people are invited to interact with, and experience, their products using sensory experimentation. The P&G 5D Experience is an interactive operational space and entertainment goal designed by Point Creative using projection-based interactive visual display technology.

What are the new retail concepts that a Brand can consider in order to create an excellent customer experience and ROI?

3 Nowadays various retail innovations reject traditional marketing strategies.These concepts leave a lasting impression on consumers and feature new and unique ways of promoting products.

Flagship stores are places where customers can experience products, the lifestyle a brand offers and the brand itself.

Digitalized stores bring the best of the online experience in-store, allowing consumers to interact with the brand and offering them an emotional experience.

Pop-up stores are quite popular in the fashion sector, allowing companies to create a unique environment that engages their customers and generates a feeling of relevance and interactivity – a fantastic way to include people in a fashion event.

Virtual Brick-and-Mortar Stores have an electronic format and four important features: no on-site products; an additional services offer, strong technological support; and integration with the community. In contrast to a self-service model, the store provides real customer service, and also educates consumers about this new concept.

Hybrid boutiques offer a sense of inspiration, enthusiasm and emotional connection, as customers combine shopping with art, food or coffee.

What are the key building blocks to implement innovative sales techniques and new retail formats?

4 The key to future brand success will be the creation of a cohesive and effective multi-platform strategy and the transformation of the brick- and-mortar store network into a modern, multi-format, innovative sales environment that integrates online, mobile and social platforms, and actual stores, making them work together to create an optimized cross-channel experience. To achieve this, a brand needs to build upon a number of action points:

1 The first action point is building a cohesive and effective multi-platform strategy that integrates all of the elements of the business from stock control to payments. Make sure you keep your brand values across all channels – it will be challenging as different channels require different messaging and target shoppers in a different way.

2 The second action point is blurring. To bring back brick-and-mortar customers, it is important to give them something that they cannot find online. Bring the best of the online world into the store, blurring the physical and digital: "embrace the show-room experience"!

3 The third action point is personalization. It is impossible to rearrange your brick –and-mortar store to suit each individual customer, but online, you can do just that. Using consumer data, transactional data and product data to recommend items to website visitors is possible, and personalized content generates a 7.8% increase in conversions.

4 The fourth action point is encouraging synergies between online and in-store experiences. Luxury fashion brands have found that the better their online offer is, then, the more people will visit the physical store. At the same time, the Fashion Insight Report confirms that an immersive in-store experience is acknowledged by retailers as being increasingly important in the face of online and, particularly, mobile retailing.

5 The fifth action point is building the foundations of excellent store performance by measuring, managing and optimizing performance. This is crucial as 60% of customers prefer an in-store experience, and as mentioned above, a great in-store experience generates profit online, through reviews as well as social media channels.

Bare International

can accompany you through this journey with its **ECX method:** **Operational Excellence, Employee Commitment and Customer Satisfaction.** Our ECX program involves multiple touch points. As 60% of customers in the fashion industry prefer the in-store experience, retail strategies through well-defined touch points are the key to operational excellence.

Employees require adequate training to achieve outstanding product expertise, but employee commitment also depends on other factors. To build a strong corporate brand, it's recommended to have Brand Ambassadors. These are employees who are highly engaged, connected and committed. Key indicators to measure employees' commitment are Performance, Development and Motivation. BARE recommends measuring this on a regular basis, as part of the ECX approach.

Customer Satisfaction is the state of mind that customers are in when their expectations have been met or exceeded over the lifetime of the product or service. In turn, customer satisfaction leads to brand loyalty and repeat purchases. Leadership is essential. Whether using new or traditional technologies, the key to digital transformation is re-envisioning and driving change in the way the company operates.

2 Introduction

Fashion retail across the world is undergoing substantial change

Key research questions of this study

Introduction
Fashion retail across the world is undergoing substantial change

Digital transformation – the use of technology to radically improve the performance or reach of the company– is becoming a hot topic for retailers across the globe. Digital channels have made the whole shopping experience very different, and now consumers, still driven by the sumptuous clothes and the feel-good factor of dressing sharp, have many different ways to engage with fashion brands.

The fashion retail industry has traditionally been focused on product innovation and only partially on service or customer service innovation (EU Commission, 2014). Regarding e-commerce, the fashion industry has also been an early adopter. So far it has avoided several of the downsides of online commerce experienced in other retail segments, but fashion retailers need to invest a huge amount of money and energy to stay in the game. E-commerce is globally responsible for 9% of retail sales and it is forecast to reach 11% by 2018.

E-retail, conceived as a web presence alone, is no longer sufficient today for any high street fashion retailer. The growth in online transaction stands in stark contrast to the rising number of empty outlets on the high street. While sales on the high street are declining, consumers are increasingly turning to the internet to purchase fashion products, thus creating a change in consumer behavior. From virtual window shopping apps to art gallery retailers, fashion these days is no longer restricted to in-store and online purchases. The online customer journey is becoming essential for web retailers all around the world.

During the decision-making process, consumers have an expanding multiplicity of information available to assist in their product choices. However, relying on the representation of a garment on a computer screen, rather than inspecting it prior to purchase, can cause distortions in perceptions during the investigative stages of the decision-making process. This increases the risk taken by the consumer and can result in a rise in returns of unwanted products, leading to dissatisfaction for consumers and higher costs for providers.

Changes in customer behavior call for improved touch point management. The growth in mobile technologies and social media is redefining interaction and communication structures and changing customer behavior as a result. Digitalization is transforming the sales and service process, and the fashion industry is trying to lead the way of innovation in retail formats.

New store formats – such as digital showrooms and pop-ups – offer manufacturers a cost-effective way to reach consumers and generate sales, but this change in retail strategy requires investment from brands.

The good news for fashion retailers is that whilst the declining high street and growing electronic engagement is unavoidable, the various physical channels still account for 88% of all sales transactions.

We need to shift our focus from identifying touch points on the consumer decision journey to enhancing experiences all the way through. While everyone seems to love to talk about the significance of data and technology, we still have to bridge the gap between crafting messages and designing experiences. Luckily, the tools we have today far exceed what anybody could have imagined a generation ago, allowing us to engineer systems to adapt and learn how to better serve customers.

Let us take a look at these technologies, what they mean and how they impact fashion retail business. Then, we can pull it all together and show how to build a strategy for an omnichannel fashion world.

Fashion retail across the world is undergoing substantial change

KEY RESEARCH QUESTIONS
OF THIS STUDY

How is the fashion retail industry changing and what can a Brand do to adapt its strategies to the new trends?

Which innovative technologies could enhance the sales process and could result in more leads and/or higher conversion rates?

What are the new retail concepts that a brand can consider in order to create an excellent customer experience and ROI?

What are the key building blocks to implement innovative sales techniques and new retail formats?

3 Trends and Challenges

Trends: physical vs. online channels in a rapidly changing environment
Challenges of the fashion retail sector in the new environment
Benefits of online order/transactions
Challenges to ordering online
Challenges of brick-and mortar-stores

Trends and challenges

To shed some light on current trends and developments in the fashion sector, we collected the key facts about the changes that are influencing the growing complexity in online fashion:

The clothing and accessories market is expected to grow by 19% from 2012 to 2017, according to the Fashion Insight Report 2014.

Online fashion sales grew by 185% between 2007 and 2012, and sales are predicted to rise by 41% by 2017.

Nearly half of all consumers **are shopping online for clothes.**

Almost half of all consumers regularly use **three or more channels** to do their shopping, meaning an integrated experience is of the essence

Fashion purchasing decisions are driven by **price** for 71% of all shoppers.

84% of all shoppers are directly influenced by what their **social network** says about a product.
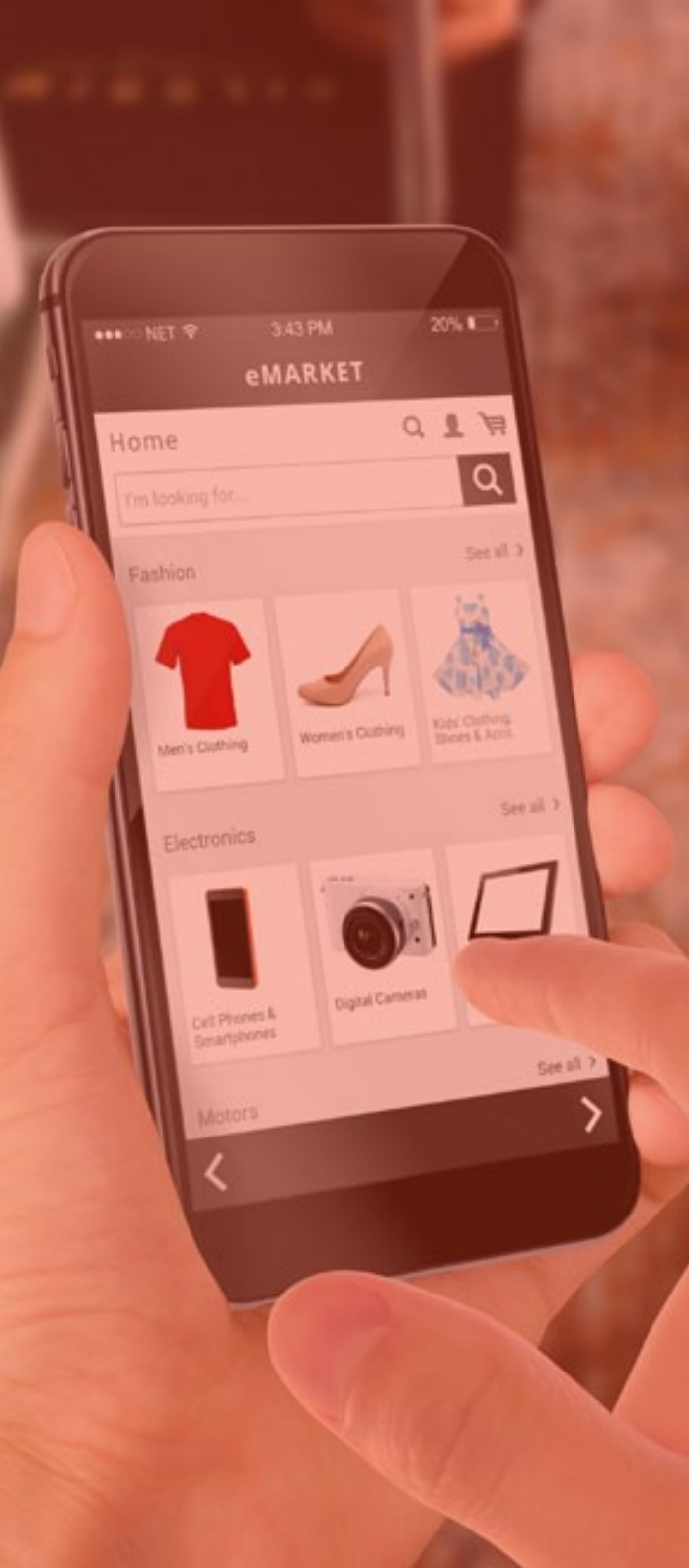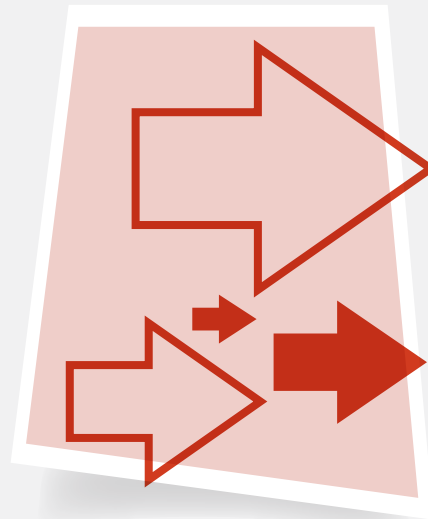
TRENDS:
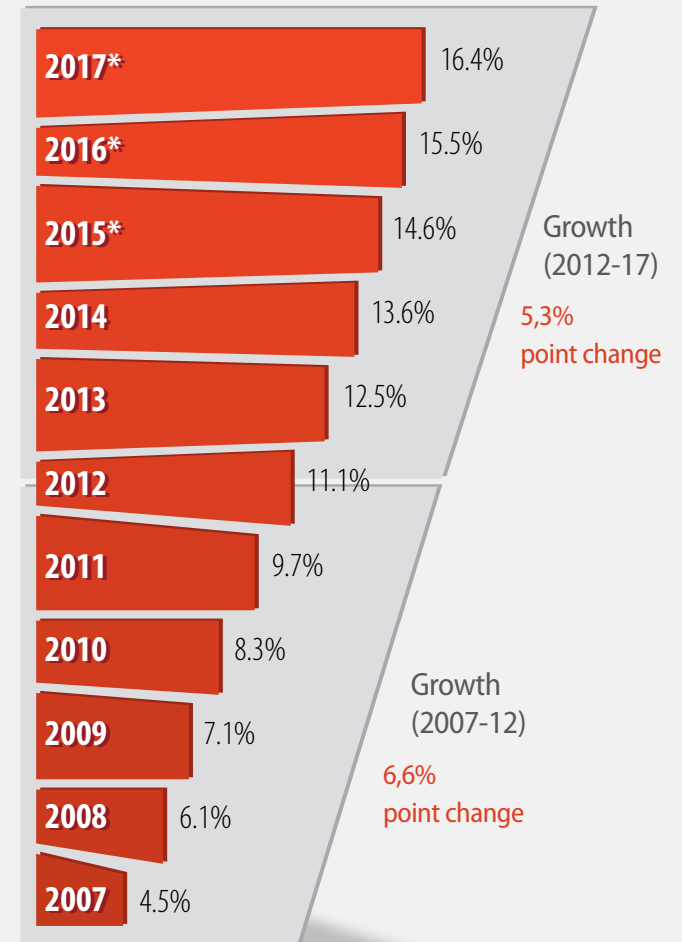## Physical vs. Online channels in a rapidly changing environment

Online fashion retailers have experimented with e-commerce solutions since early 1999, which is why clothing accounts for a major share of all e-commerce purchases since 2000. In the UK, over £4.3 billion worth of clothes were purchased online in 2009 alone. At the same time physical store portfolios started to decline. The decline in physical store environment goes faster in the clothes industry than in other sectors (Deloitte 2011).

Online fashion shopping continues to grow rapidly, driven by a simple fact - people have massively gone digital. It is no secret that in just a few short years, our world has changed. People are now fully familiar with digital resources and appreciate the safety and security of online shopping. **It is safe and secure and above all, it is convenient.** With people multi-screening in their leisure time, online sales has seen significant growth over the years. As retail sales figures continue to improve, fashion (clothing and footwear) has surpassed all other product categories in online sales growth (Mintel, 2013). It is also **'the most popular category bought from mobile devices while on the move'.** Thus, fashion related products are at the forefront in the evolution of the virtual selling environment.

* Forecasted

Year	Growth
2017*	16.4%
2016*	15.5%
2015*	14.6%
2014	13.6%
2013	12.5%
2012	11.1%
2011	9.7%
2010	8.3%
2009	7.1%
2008	6.1%
2007	4.5%

Growth (2012-17)
5,3% point change

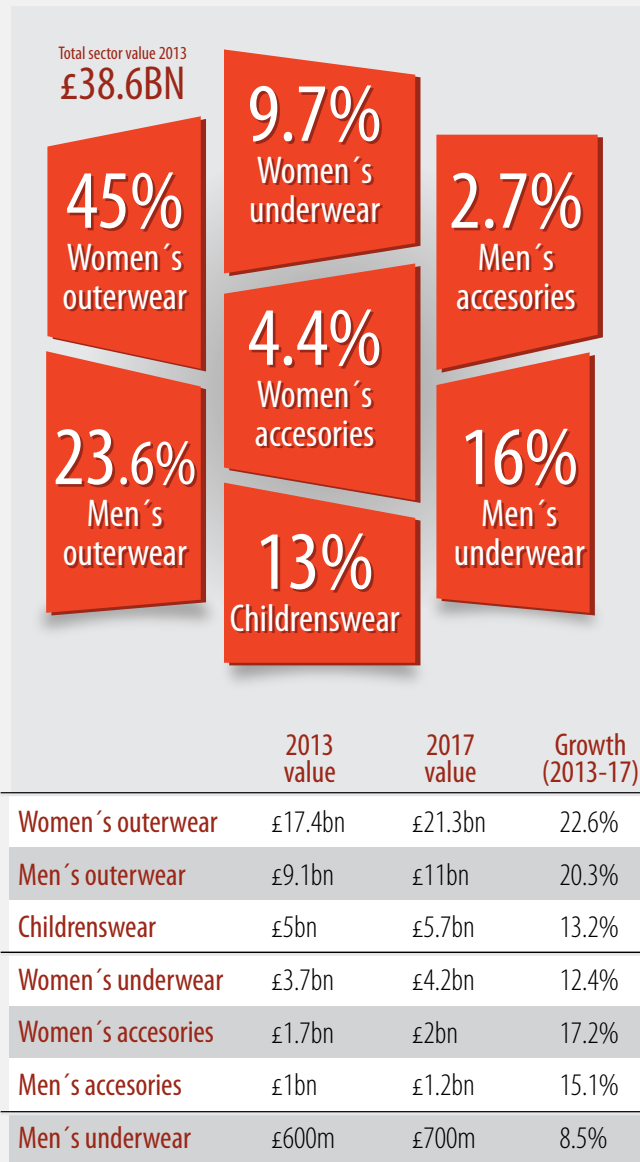Growth (2007-12)
6,6% point change

GROWTH OF ONLINE SPEND FOR FASHION SECTOR
Source: ConLumino

VALUE OF CLOTHING AND ACCESORIES MARKET BY CATEGORY IN 2013 AND PREDICTED GROWTH 2013-17

Source: ConLumino

Total sector value 2013
£38.6BN

45% Women´s outerwear

9.7% Women´s underwear

2.7% Men´s accesories

4.4% Women´s accesories

23.6% Men´s outerwear

13% Childrenswear

16% Men´s underwear

	2013 value	2017 value	Growth (2013-17)
Women´s outerwear	£17.4bn	£21.3bn	22.6%
Men´s outerwear	£9.1bn	£11bn	20.3%
Childrenswear	£5bn	£5.7bn	13.2%
Women´s underwear	£3.7bn	£4.2bn	12.4%
Women´s accesories	£1.7bn	£2bn	17.2%
Men´s accesories	£1bn	£1.2bn	15.1%
Men´s underwear	£600m	£700m	8.5%

At the same time, the target audience of fashion retailers is changing: **generation "Y" and soon "Z"** are becoming key targets. Research by Mintel (2013) identified 25-34 year olds as the main buyers of fashion online. They also found evidence that the 16-24-year-olds segment is more likely to buy clothes online than in store.

As such, consumers between the ages of **16 and 34 years old** are emerging as a main focus for brands pursuing an online marketing strategy. As this new audience is essentially digital, fashion brands need to prepare themselves to provide them with a very different experience.

- BUILDERS
- BABY BOOMERS
- GENERATION X
- GENERATION Y
- GENERATION Z

2015 2020 2025 2030 2040
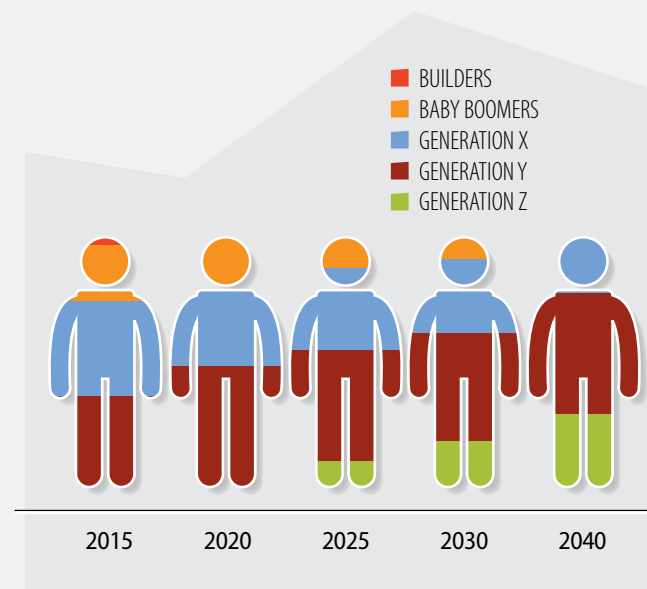
MILLENNIALS WILL COMPRISE THE MAJORITY OF THE WORKFORCE BY 2025

Source: U.S. Census Bureau

Nowadays, most mobile phones are already smartphones and apps that compare prices or send out coupons are already among the ones most heavily used. In the years ahead, mobile is going to develop along the lines it currently tracks. It will increasingly become the instinctive platform for buying things online, becoming at the same time a tool of engagement and interaction with customers. As mobile is gaining a larger share of e-commerce, it presents marketers with a huge opportunity: creating utility and value for customers, wherever they are.

Social networks have continuously evolved over time, while playing an essential role in the decision-making process, including awareness, scope, plan, and product selection. A 2015 report of the retail industry shows that the speed of customer response has fallen dramatically with emails while it improved significantly in social media and in particular Twitter. Consequently, content generation by Retailers is also very important to increase social engagement with potential customers, while driving traffic to the website. US research on the 20 largest e-commerce sites shows that the generation of content enabled by social media channels has an impact on product ratings online, which then directly affects online purchasing decisions. According to Retail Technology (2015), over one third of fashion companies have adopted social networks, including **Facebook, Instagram, Pinterest, Twitter, LinkedIn, YouTube and Google+.**

Social media has seen dramatic growth as well. The majority of Facebook traffic now comes from mobile phones rather than the traditional PC and laptop route and 20% of people's 'mobile time' is spent on some sort of Facebook property. Social Media is now an integral e-commerce driver as consumers are relying on their networks for pre-purchase research.

Cross-border e-commerce is also growing rapidly due to the fact that generation "Y" loves ordering from abroad through specialized fashion sites. The last two decades, they have caught the interest of global marketers because of their spending power and because of the strong likelihood of them engaging in impulse buying behavior. Okamura, managing partner at Okamura Consulting, a group specializing in online retail says: "There's been an accelerating trend in international or cross border e-commerce, and small niche online retailers are now doing 10-20% of their sales outside of their own country."
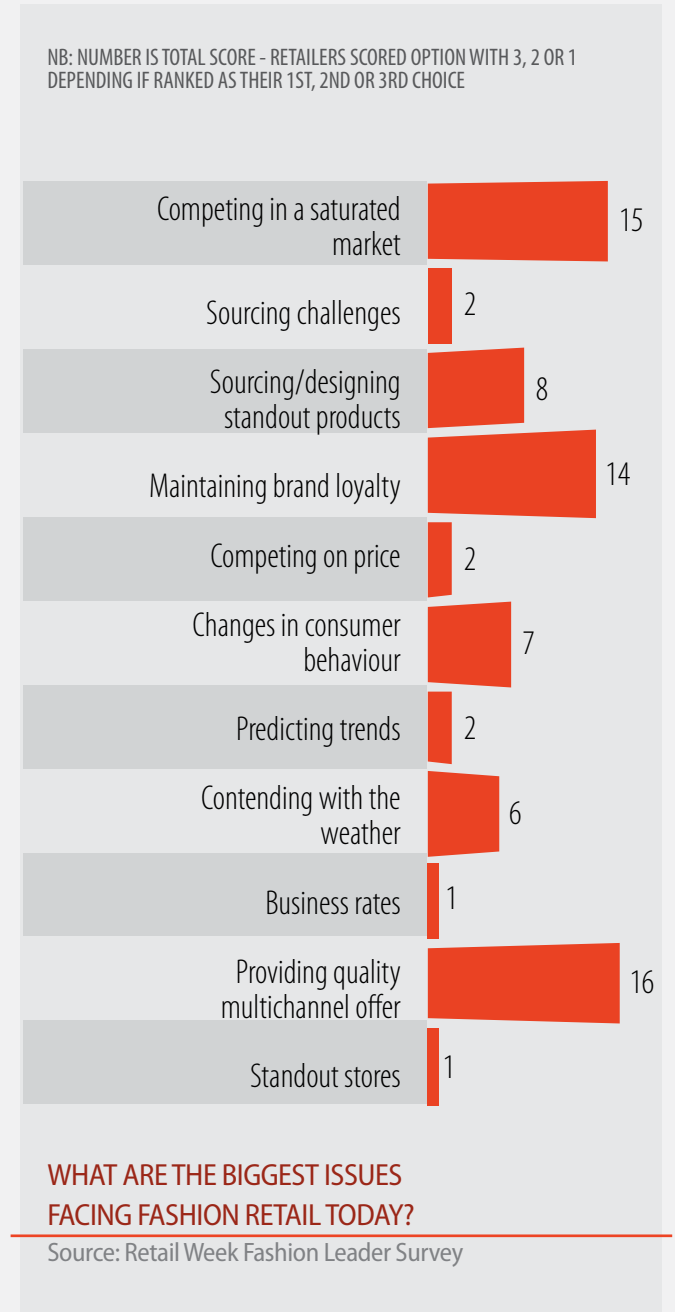
Challenges of the fashion retail sector in the new environment

Today, fashion retailers operate in a world where customers are shopping across a wide variety of channels, in a wide variety of ways. This is having a huge impact on marketing, retail technology and even accounting and back-end systems.

Multichannel developments are quite clearly the leading challenge retailers are facing, but also by far their leading priority. A huge proportion of retail sales still occurs offline, but around 50% of these sales have been influenced at some point by digital technology, according to Facebook.

Another top challenge is **maintaining brand loyalty** – no less than 50 % of respondents name this as their biggest challenge, based on the Fashion Insights Report 2014. The results by Reid and Ross (2015) indicated that the majority (90%) of respondents purchase through a range of stores and are not loyal to a specific brand. When one store does not answer their needs, they continue their search for information and their evaluation of alternatives with other stores, resulting in lost opportunities for retailers.

Furthermore, **products are purchased on impulse** (60% in the study), even when the need for a specific product pre-existed. Therefore, shopping for clothing is a spontaneous, irrational process making product availability, convenience and the smooth transition across channels for each retailer, paramount to encourage consumers to shop for a specific brand. Building brand and consumer relationship is key for retailers to build and retain loyalty.

NB: NUMBER IS TOTAL SCORE - RETAILERS SCORED OPTION WITH 3, 2 OR 1 DEPENDING IF RANKED AS THEIR 1ST, 2ND OR 3RD CHOICE

Challenge	Score
Competing in a saturated market	15
Sourcing challenges	2
Sourcing/designing standout products	8
Maintaining brand loyalty	14
Competing on price	2
Changes in consumer behaviour	7
Predicting trends	2
Contending with the weather	6
Business rates	1
Providing quality multichannel offer	16
Standout stores	1

WHAT ARE THE BIGGEST ISSUES FACING FASHION RETAIL TODAY?

Source: Retail Week Fashion Leader Survey

An observed change in the mindset of the consumer is becoming significant. **Considered consumption** is becoming the new trend, causing a revolution in the need for fashion items and restructuring the market.

At the same time, **new customer expectations** arise. A recent study by BloomReach (2015) found that 87% of consumers prefer to buy from brands that are best able to personalize their experience. Therefore, personalization is becoming a key to engage generation "Y" consumers.

OLD MINDSET:
Careless consumption

NEW MINDSET:
Considered consumption

Quantity
I buy lots of clothing and fashion

Quality
I tend to invest in key pieces

Product
It´s mainly about the product

Holistic
It´s about the product and the background to the product

Price
I want everyday low prices

Value
I don´t mind paying for good things

Impulse
I buy things without thinking much

Considered
I buy things I like, but think about what I´m buying

CHANGING MINDSETS OF THE CONSUMER FASHION

Source: ConLumino

WOMEN RESEARCH RESPONDENTS AGREEING WITH VARIOUS STATEMENTS ON FASHION

21.4%
" I like to look through lots of things when i shop for fashion"

59.8%
" I want retailers to present fashion that is relevant to me"

68.7%
" Searching through lots of clothes to find the right thing is annoying"

THE IMPORTANCE OF EDITED CHOICE

Source: ConLumino

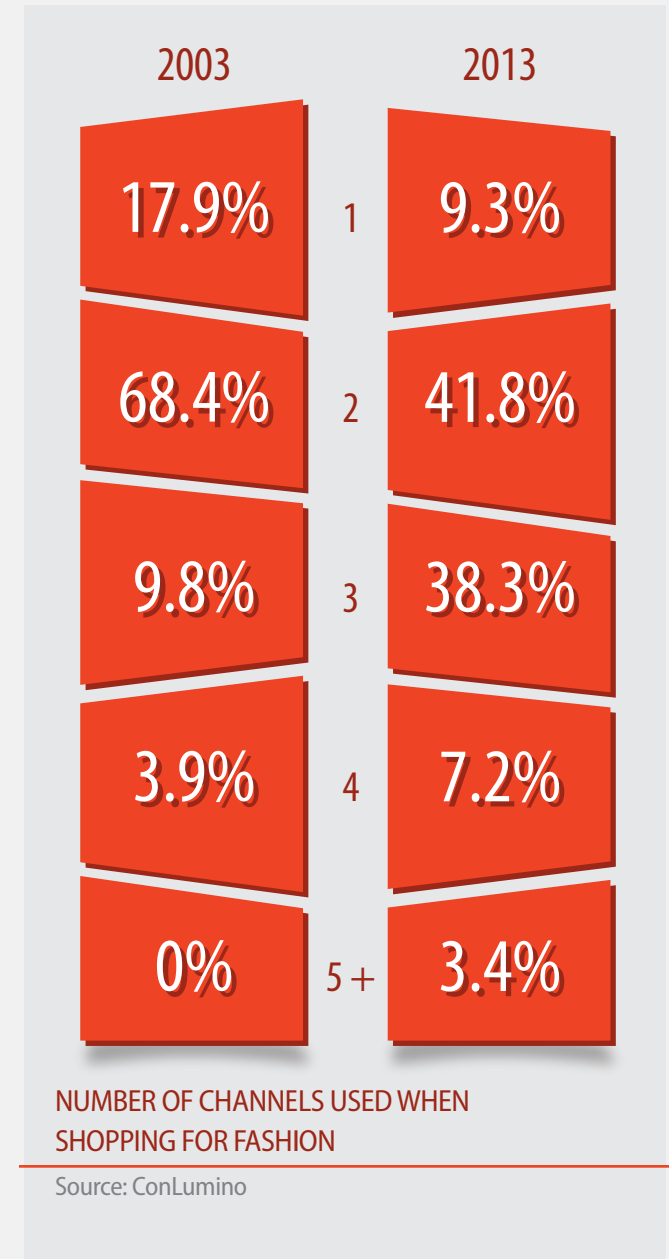# Multichannel, omnichannel, cross-channel

The key to adapting strategies to new trends is not so much to look at how online, mobile and social channels are impacting the fashion business, but more how together, 'omni-commerce' can use technology to boost sales and build brands – across all these channels.

While there is clear growth in online fashion retailing, changes are afoot. The increased use of mobile devices is going to change the shape of online fashion. **First, there will be a growing trend towards e-commerce via devices running mobile operating systems.** These tablets and smartphones will slowly take the place of the home PC and be used by shoppers recumbent on their sofas while watching TV. This will have a number of effects on the development of online fashion retail. For a start, retailers will have to start thinking of shoppers using multiple devices to engage with them. The retail journey is about to get very complex.

Without a doubt, that is reflected in the fact that multichannel developments are

quite clearly the leading challenge retailers have to face, and by far the leading priority for the fashion brands. In fact, fashion brand executives say that investment in multichannel is their number-one priority, and investment in mobile technology is named as one of the top three priorities.

Omnichannel and digital growth will continue in importance, thus retailers will have to continue to invest to stay ahead of the game. Consumer expectations have changed dramatically because consumers have more information readily available and they know the possibilities.

2003		2013
17.9%	1	9.3%
68.4%	2	41.8%
9.8%	3	38.3%
3.9%	4	7.2%
0%	5+	3.4%

NUMBER OF CHANNELS USED WHEN SHOPPING FOR FASHION

Source: ConLumino

At the same time, traditional strategies are becoming obsolete in the race to connect with the consumer through innovative marketing methods (Franks et al., 2011). Therefore, fashion brands need to consider how to apply omnichannel strategies to harness the marketing potential of a range of selling modes.

Assessing the online content used by fashion retailers, Magrath and McCormick (2013) **identified five design elements: practical product information, practical services information, trend information, style advice and social media content. They suggested that out of these, practical product information, trend information and style advice were key enablers for online purchases.**

Interestingly, respondents show distinct preference for either an online (40%) or in-store (60%) shopping environment. However, the majority (80%) did suggest they would consider other channels in specific instances (Reid & Ross, 2015).

Research by Reid & Ross (2015) showed that whilst there was a lack of in-store brand loyalty, consumers are constant in their choice of a preferred purchasing platform: online or in-store. Furthermore, they buy on impulse even when a need exists. This indicates the necessity for a smooth transition between channels and stronger focus on the consumer experience in online purchasing to help relationship building between a brand and the customer.

Benefits of online order/transactions

To understand why your <u>consumers love ordering online</u>, we listed the benefits of purchasing online:

- **Multiple forms of convenience** – motivation for 70% of consumers (Mintel, 2011)
    - less shopping time/speed of product selection
    - flexibility with regard to when to shop
    - less physical effort
    - easier response to advertisement or promotion
    - supporting outfit ideas

- Ability to provide **more product information** than available via conventional physical retail modes
- **Ease of price comparison**, lower prices/availability of discount codes
- Online platforms can have **better product availability** (e.g. in size)
- **Speed of product selection**
- **Free returns**
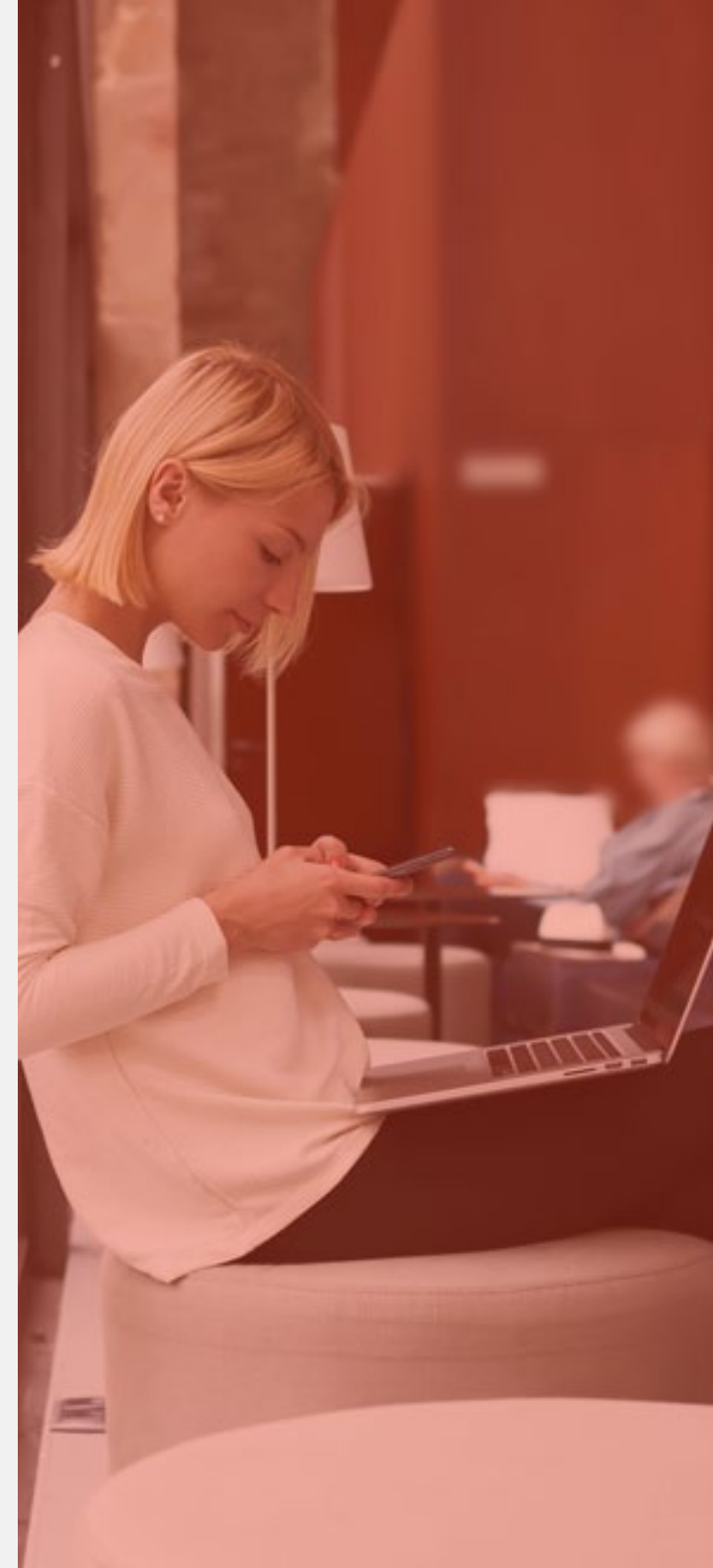
Challenges to ordering online

Despite the general online order trends, several barriers can slow down online sales growth. When we examine these barriers, we need to check both the consumer's and the retailer's point of view to be able to find structural solutions where possible.

BARRIERS FOR CONSUMERS:

■ **Returns policy**: financial cost associated with the return postage when a garment was unsuitable (mentioned by 70% of respondents)

■ **Delivery and returns policy complexity**: inconvenience of postal, courier or collection times and delivery/return procedures

■ **Sizing variation between brands**: lack of predictability of sizing online and prevalent inconsistencies with size determination between retailers

■ **Accuracy of visual pre-purchase information**: differences between images and the physical appearance of the garment; visual interpretation can be subjective. The problem in understanding information creates post-purchase dissonance and the lack of product predictability

prevents respondents from taking purchase risks with online platforms

■ **Delay between ordering and receiving an item**

■ **Difficulty in assessing the information presented remotely via a computer screen.**

Research identifies that these barriers have resulted in consumers restricting their purchases to 'a little clutch of tried and tested shops' (McCartney, 2010), or ordering clothing in multiple sizes and then returning garments (The Herald, 2011). To "stay in the game" and increase online sales, fashion brands need to overcome these barriers – or at least some of them – when building their multi-platform strategy (see later). In an effort to counteract these issues, there is a growing trend for consumers to engage

with the omnichannel concept through show-rooming, which involves investigating a garment in-store prior to ordering online (Klena, 2013).

On top of these barriers we also need to take into consideration the major cause of dissatisfaction with products bought online: the inability to physically touch and try on garments to appraise size, fit and quality (Mintel, 2012). **To facilitate a positive online experience, retailers should address the difficulties of sizing variation between brands, the accuracy of visual pre-purchase information, and the delay between ordering and receiving an item.** If consumers are clear about what products they are expecting, and feel confident in knowing the garment will fit them, this will encourage greater purchase across channels for a specific brand.

There are also several significant challenges that retailers have to face regarding online retail. With two thirds of major retailers offering free return postage, the returning practice of ordering clothing in multiple sizes and then returning the garments is not only a problem for stock inventory and control, but also directly affects costs and profit margins.

How significant is this returning practice?

A 2013 interview by Askeland claims that a third of women's clothing, purchased online, is returned. Butler (2013) suggested that in fact this figure could be as high as 40%, however we also need to note that such a high volume of returns is mostly due to the item not being as consumers expected it to be.

Conversely, there is increasing use of Click and Collect (Rubin, 2013; Reid & Ross, 2015), which allows customers to buy online or order in-store and collect in-store for inspection and immediate return if the product is not as expected. For further convenience, there is an increasing network of CollectPlus, which are local pickup and return points for online orders (Mintel, 2013). These options solved issues related to delivery complexity and cost of returns – through immediate return in stores.

In the development of an omnichannel marketing strategy, designed to create a satisfying experience for consumers, it is imperative that fashion brands identify what can help them boost their market and overcome any potential barriers that can damage the exchange.

Challenges of brick-and mortar-stores

It seems that most fashion brands were preparing for the change in consumer behavior causing a rise in online sales, as in 2011, Deloitte noted that physical store portfolios were already in decline. The physical store environment for selling clothes has been diminishing at a faster rate than in other industries. The rise in empty retail outlets has signaled the falling popularity of the traditional high street store (The Telegraph, 2012) and, according to Allen and Robinson (2014), this situation is likely to get more acute as 80% of high street leases are due to expire by 2020.

However, the ONS (2014) data revealed that, even with the expected growth of online sales and decline in the high street retail, purchases via the internet currently only account for 11.8% of all retail sales, indicating that other channels are responsible for 88% of sales.

It is equally important to mention that though online fashion retail grows rapidly, in the Reid &

Ross recent study **60% of respondents prefer an in-store experience**, due to pre-purchase visual appraisal and fit assessment. The study also agrees with Mintel's (2012) suggestion that the fit and the ability to interact with the product facilitate selection. This means that **brick-and-mortar stores still play** a significant role in fashion retail, however, this role is undergoing serious change.

To summarize, we can conclude that today, shopping for clothes is a truly cross-channel experience and while consumers are increasingly purchasing clothes online, they also use the internet to "just browse" and they still visit stores. As such, online and in-store reinforce and complement each other, meaning that to enhance the sales process, retailers need to focus more on creating a fluid shopping experience, where consumers can begin the journey online and end it in-store – or vice versa.

Digitalizing the customer journey

The development of omnichannel retail is generating new challenges for fashion brands. Thus, understanding the changing patterns of individuals who are interacting with a brand's offer is fundamental to business planning.

The process of consumer decision-making is a framework for understanding the stages consumers go through when buying an item. There are five stages: problem recognition (current state versus desired state); information search; evaluation of the alternatives; decision/product choice (purchase); outcome (satisfaction or post-purchase dissonance) (Schiffman and Kanuk, 2010; Solomon, 2013).

In the era of digitalization, two major themes emerge from the consumer decision journey in retail:

1. The blurring of the digital with the physical retail environment While many retailers still separate brick-and-mortar from online retail channels, consumers see the two as connected and they expect to feel that connection throughout their decision journey. Checking deals online and then bringing deals and coupons into the store, reading consumer reviews while in the store, and connecting back with a retailer through online channels, if questions arise, are all commonplace activities. Today's consumers want smoothly connected experiences and more sophisticated means of moving from online channels into the store and back online again.

2. An increasing desire for personalization: Nowadays very few brands offer anything close to a personalized experience, and even then, any pre-shopping that occurs online is not carried through to the retail environment. As an industry, fashion retailers need to move beyond basic targeting, tracking and demographic segmentation to drive deeper: an accepted interaction with consumers, where it is possible to deliver valuable and personal experiences in and out of the store.
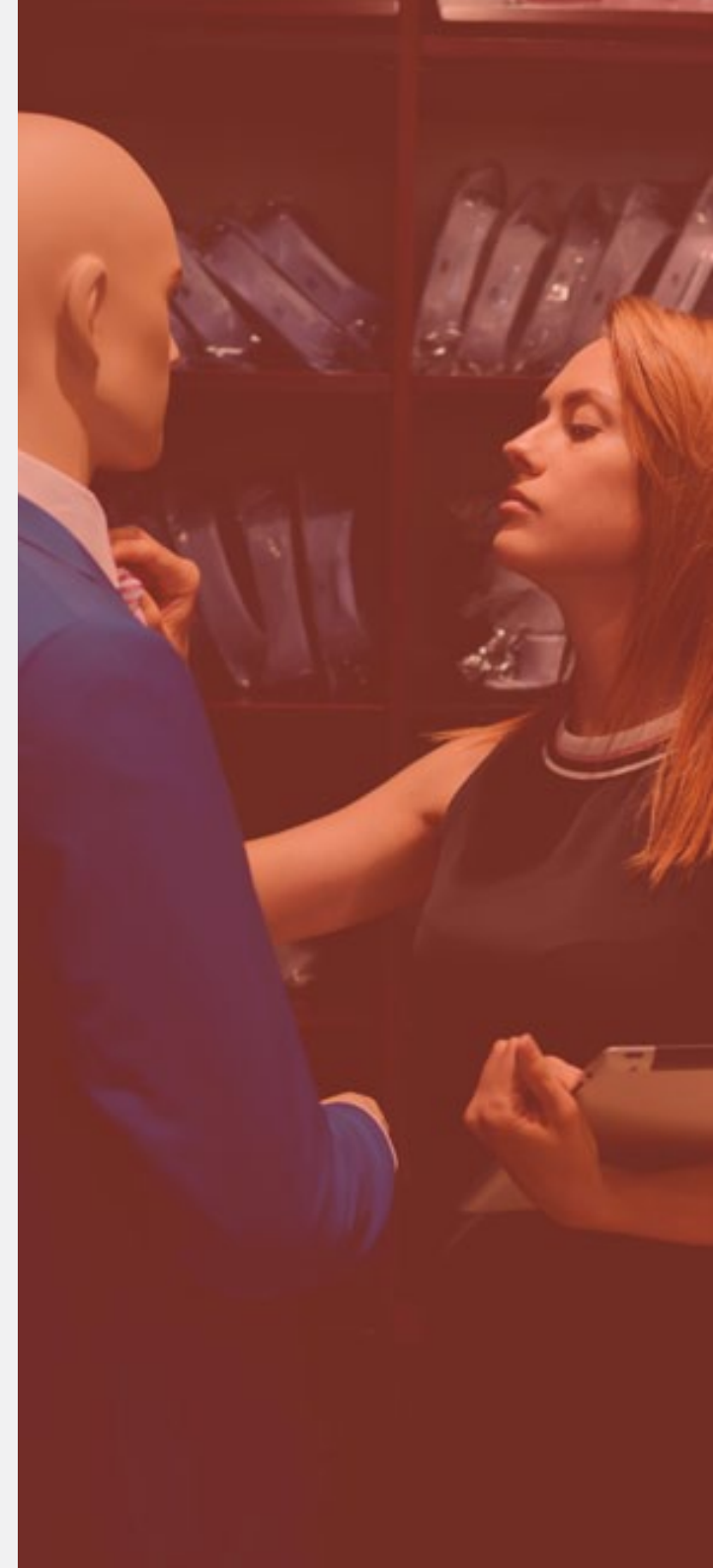
How to get there: 5 action points

Today, fashion retailers are facing the most significant change in the sector's history. They need to keep up with the ever-evolving changes in customers' expectations, all this on a saturated market. To be able to attract and then retain the attention of customers, brands have to place innovation at the heart of their strategies.

The goal of future leading fashion brands is multichannel development and transformation of the store network into a modern, stimulating, innovative sales environment. The real power however lies in bringing together the online, mobile and social media platforms within your stores, and making them work together. To achieve this, we suggest five action points, which form a framework we want to build upon in this research:

The first action point

is building a cohesive and effective multi-**platform strategy** that integrates all the elements of the business from stock control to payments. Make sure you keep your brand values across all channels – it will be challenging as different channels require different messaging and target shoppers in a different way.

The second action point

is **blurring**. To bring back brick-and-mortar shoppers, give them something that they cannot find online. Bring the best of the online world into the store, blurring the physical and digital: "embrace the show-room experience"!

The third action point

is **personalization**. IIt is impossible to rearrange your brick –and-mortar store to suit each individual customer, but online, you can do just that. Using consumer data, transactional data and product data to recommend items to website visitors is possible, and personalized content generates a 7.8% increase in conversions.

The fourth action point

is **encouraging synergies** between online and in-store experiences. Luxury fashion brands have found that the better their online offer is, the more people visit the physical store. At the same time, the Fashion Insight Report confirms that an immersive in-store experience is acknowledged by retailers as being increasingly important in the face of online and, particularly, mobile retailing.

The fifth action point

is **building the foundations of excellent store performance by measuring, managing and optimizing performance.** This is crucial as 60% of customers prefer an in-store experience, and as mentioned above, a great in-store experience generates profit online, through reviews as well as social media channels

4 Innovative Sales Concept

Innovative Retail Concepts

Innovative Fashion Retail Concepts

Future Tech Innovations for Retail

Retailer: Tom Dixon
Innovation: Pop-up store

Objective

Tom Dixon described the installation as an attempt to reclaim the world of retail from the ever-growing threat of online stores, and a chance to create a more engaging environment. Dixon felt that more is needed from the retail world in order to bring products to life and encourage consumers to step away from the laptops. With an aim to explore how retail may look, sound, taste and feel, the space brought together design, technology, beauty, fashion and interiors under the same roof in an immersive department store pop-up (actually the first ever).

Added value: At MULTIPLEX, Tom Dixon and his multi- disciplinary collaborators created a new kind of retail space – where powerful experiences, bespoke services and unique products came together. Instigated by Tom Dixon, MULTIPLEX was built around the contributions of its collaborating brands, bringing their own ideas and experiences to the event. "The space becomes a resource for working, playing and entertaining, for inspiration and for business – a platform for superior broadcasting of brands and ideas and a temporary central London entertainment space for new commerce." MULTIPLEX also coincided with London Fashion Week, the London Design Festival, the BFI London Film Festival and the Frieze art fair, making it an opportune moment for brands like Aston Martin to spotlight their luxury persona to their intended target of discerning well-heeled buyers.

Outcome

The Multiplex received great media interest and a number of visitors.
Location: Old Selfridges Hotel, London (was open till 15th Oct, 2015)

Concept:

With over 30 different brands spread across the 20,000 square foot space in Old Selfridges Hotel in London, there was plenty for everyone. You could get your fashion fix from Obataimu who have brought their Indian atelier to London. Here you could order a customized design and then watch it being made on-screen in the Mumbai production studio. The Cubitts eyewear area allowed you to try before you buy with their digital eyewear changing room, while a sculptural ceiling had been created by Boskke to entice plant lovers in. The specially assigned technology space was filled with speakers and screens to use for events and screenings but it was predominantly being controlled by small tech business Teenage Engineering to demonstrate their products.

Retailer: Selfridges
Innovation: Fragrance Lab

SELFRIDGES&C0

Objective

The collaboration between The Future Lab and Design Studio to create the Fragrance Lab engaged customers with the brand and the process of creating a product unique to them. The idea was to provide an example of what the future looks like by creating an engaging, multisensory, more interactive form of retail.

Added Value:

The Selfridges event offered a glimpse into the future of in-store retailing perfectly exemplifying how customer habits, preferences and tastes, as well as their physical interaction will be used to develop a personalized service or product. Selfridges Fragrance Lab is an excellent example of innovation that doesn't rely on its heritage to convey its brand identity, but its core message of "It's a shopping experience that promises to surprise, amaze and amuse its customer by delivering extraordinary customer experiences".

Outcome:

In the end approximately 2,500 people went through the experience and only four people wanted a refund on their fragrances, which is a phenomenal success rate. It shows that people are putting themselves into the hands of the brands they trust. The Fragrance Lab also received great and positive media coverage in national media.

Location: temporary installation in Selfridges (Summer 2014)

Concept

The temporary installation that was located in the Concept Store in Selfridges took customers on a journey through sensory chambers, asked them questions to determine their tastes and habits and then presented them with a 50ml bottle of their signature scent.

A profile of each guest was created as guests ventured through a series of interactive areas. An iPad questionnaire asked questions about shopping habits, perfume tastes and deeper personality traits. Shoppers were then given an iPhone with headphones and guided by voiceover into a series of rooms. At the end of the experience, a member of staff in a white room, offered them smells from vials holding variations of their signature fragrance. The end result was a personal 'prescription' detailing their character and the key ingredients in their selected perfume.

Retailer: Nike

Innovation: Digital Services (Interactive touchscreens, LED walls, augmented reality tools)

Objective

In January 2012, Nike announced a new product, the Nike+ FuelBand, which aimed to turn users' lives into sport. The Fuelband tracks the users' daily activity, allowing it to analyze their data to train more effectively. In order to promote the product before it went on the market, Nike created the NikeFuel Station Installation at Boxpark together with AKQA London to give the best customer experience to their target group.

Added Value:

The Nike+ FuelStation brought premium experiences and services directly to London's athletes, helping to enable every athlete to be the best they can be.

Outcome:

Consumers made nearly 2,000 videos in the first month, moving more in a store than they'd ever done before. The installation got them hooked on the idea of Nike+ FuelBand, with 93% coming back to buy the product on release.

Many brought friends to NikeFuel Station to record group videos. They shared their recordings on Facebook and Twitter, driving awareness of Nike's new space, and bringing to life the vision of a digitally-enabled athlete hub right in the heart of London's Silicon Roundabout.

Location: temporary popup store in London (closed)

Concept: Boxpark was a temporary pop-up retail project in the heart of trendy Shoreditch, East London. It was made entirely out of shipping containers with a unique mix of various fashion and lifestyle brands, galleries and cafes. The store was designed entirely in-house by the Nike Brand Design team and featured a futuristic interior with many digital aspects. Floor-to-ceiling motion sensing, interactive LED walls were designed to encourage consumers to move more, while an engaging motion sensitive installation displayed a life-size digitized reflection of them on an LCD wall. This reacted to their movements to create a piece of digital art, which could be shared with friends via social networks. Motion sensitive mirrors, or "Digital mannequins," played film footage of local runners wearing products from the store. Interactive touchscreens provided information about Nike+ products and let shoppers buy items from the entire Nike collection, while an in-store treadmill allowed runners to ensure they purchased the right shoes to match their style.

Retailer: Tesla
Innovation: City Center Showroom

Concept: Tesla decided not to build a traditional car dealer network. They looked at the car buying process and optimized its sales model to fit the way people buy cars today. Since people start online, Tesla designed their process around online information, commerce, and community. Their site is unusually clear, clean, and effective. For people who want to see the car, they are building kiosk stores in malls with Tesla experts who can't sell cars and who aren't commissioned. When a buyer is ready, they place a refundable deposit online. If they want to drive a car, they can arrange a test drive after they've placed a deposit.

We utilized technology to deliver a variety of informative experiences in a small space." A remotely managed network of interactive stations introduces visitors to Tesla vehicles and how they work. These interactive stations are designed to draw people into the store with visuals and content that address the most common questions they have about electric vehicles. They're intended to move visitors from general interest to real consideration.

Visitors can configure their own cars by choosing paint color, interiors, wheels and roof type. This creative process helps people imagine owning a Tesla. They can also transfer their designs to the large-scale display at the rear of the store, for everyone to see. With their questions answered and their cars designed, visitors head to the back of the store ready to buy. There, the sales team can easily retrieve the finished design and discuss additional options before completing the purchase. Customers spend a lot of time considering the purchase of an electric car. That's why we designed the Tesla configurator to work in-store, at home and on the go, providing continuous support and education. Prospective buyers can create, modify and save their car designs on Tesla store stations and revisit them on PCs and tablets—or vice versa. The experience is seamless across devices.

Objective: Develop showrooms where potential customers can experience and get closer to the brand. As such, the brick-and-mortar element of the process is more about stimulating interest, building desire and wooing the customer with an enjoyable brand technology experience while the digital aspect secures the sale.

Added Value: Tesla's focus on vertical integration enables a unified brand experience. Tesla has about 200 stores in North America, Europe and Asia, including two that opened in China recently. The company operates all of them, meaning it can control messaging, localize the glossy photographs of the Model S and ensure marketing materials are properly translated into different languages. These stores help Tesla to interact directly with its potential customers.

Outcome: As a result of their innovative showroom concept Tesla had 1 million store visitors, more than 15.000 Model S reservations in-store and online and over 85% increase in revenue in the first year.

Locations in Europe: Brussels, Paris, Antwerp, Amsterdam, Frankfurt, Stuttgart.

Retailer: Topshop
Innovation: Virtual Reality Headsets

TOPSHOP

Objective
The objective was to create an experience that would open up Topshop's London Fashion Week show to a wider audience by combining beautiful design with the latest and greatest technology. "This season's live stream in virtual reality between two iconic London destinations, the Tate Modern and their flagship store in Oxford Circus takes the idea of the traditional fashion show to a new dimension, as we continually look for new ways to engage, excite and involve our customers."

Concept:
The fashion chain took a major step into the future when it used Oculus Rift virtual reality headsets to give a group of customers a chance to virtually sit on the front row at London Fashion Show. The headsets gave shoppers a 360 degree virtual view and for the Topshop initiative they took in a live runway feed as well as some backstage action.

Added value:
Topshop has pioneered the 'fast fashion' movement, making the latest catwalk trends affordable and accessible for the mainstream. This is one example of how new virtual reality technology from the likes of Facebook-owned Oculus Rift can be used to enhance the in-store experience for customers.

Outcome
Although there was some sophisticated technology powering the Topshop project, the main ambition was to create a memorable, immersive experience, so they were pleased to see the theme of the overwhelming volume of press coverage and individual feedback was all about how amazing it was to be able to step inside this coveted show."

Several hundred people experienced the show on-demand in the days immediately following the show. The experience won 'Project of the Year' at the BT Retail Week Technology Awards 2014 and Best Hybrid Event / Best Virtual Event at the 2014 Event Tech Awards.

Concept: Inition (3D agency)

Retailer: Ralph Lauren
Innovation: Interactive Mirror

RALPH LAUREN

Objective

The American fashion brand is joining forces with tech startup Oak Labs to bring customers a smart shopping experience with new interactive fitting rooms.

Concept:

Standard mirrors are replaced with a touch screen mirror built with Oak Labs's own software. Polo Ralph Lauren's flagship on Fifth Avenue in New York City is the first retail location to unveil this technology, which can be experienced in the store's eight fitting rooms. Upon entering the fitting room the mirror, already displaying a hologram of Polo Ralph Lauren's logo, greets customers with a glowing light from behind its frame. The mirror's touchscreen gives shoppers a choice of "Fifth Avenue Daylight," "East Hampton Sunset" and "Village Candlelit Dinner" for lighting. After choosing the best light, the mirror shows photos of the items they've brought into the room, which are detected from their RFID tags, a reading technology that tracks inventory. Not only do customers see what they plan to try on, but the screen also shows how much the store has in stock according to color and size, as well as additional stylist recommendations that go with the chosen items. If they need another size, or are interested in trying on something else, there's an option to request for a sales associate's help, which the staff receives on their iPad. The sales associates can immediately respond via text messages that show on shoppers' screen, such as, "On my way!" along with a name and photo of the specific associate. Once finished, customers can enter their phone number onto the touch screen to receive a text with a link to the items that they tried on, so they can buy them in store or later online.

The final step occurs when a customer presses the "I'm ready to check out" button and an associate comes over with a mobile POS to complete the purchase.

Added Value

It's a simple, yet elegant solution that, according to Oak CEO Healey Cypher, both improves on the customer experience while also leveraging data and putting it in the hands of the retailer to make the purchase as seamless as possible.

Outcome

Location: New York. The pilot phase on 5th Avenue has just started in November.

Concept: Oak Labs

Retailer: Adidas

Innovation: adiVerse Virtual Footwear Wall

Objective

"We noticed we were unable to offer shoppers the full range of adidas Olympic products in our stores. There just isn't enough space." The company decided to look for a way to address the issue, especially as it became obvious customers were leaving stores empty-handed because they could not find the product they wanted. The magical spinning interactive adiVerse Virtual Footwear Wall potentially puts as many as 8,000 shoes at shoppers' fingertips in a futuristic mash-up of e-commerce and the mall. Adidas wanted the virtual wall to enable shoppers to freely select from a wide range of products or use intelligent search tools to narrow the selection down to the products that are right for them. The ultimate goal was to create an experience that brings all of the flexibility of the Web into an interactive retail environment, no matter the size of the store.

Added Value:

Supplemented by a supply of actual shoes that can serve as fit models, the display wall allows retailers to deliver massive inventory in a relatively small space. The typical adidas store stocks around 200 shoes, while the company offers over 4,000. With the virtual wall, customers have access to the entire adidas offering. The 3D wall is most beneficial for small retail spaces, saving room from huge inventory. In addition, the installation turns flat walls into prime selling space.

Outcome

Small retailers can now act like a big flagship store in a town like New York. With the wall now installed in various locations, it has driven increases in footwear sales of more than 40% in every instance. Additionally, the concept is proving to drive higher rates of sale and increased average sale prices.

Concept:

As a result of a project between Intel and adidas, this interactive wall displays up to 8,000 shoes. The wall uses state-of-the-art, touch-screen and real-time 3D rendered products on a virtual shelf. On the massive touchscreen, customers can swipe through endless collections with just a touch of their fingertips. Shoppers can also rotate articles through many angles, zoom in on the products, pull up info and check out what people are saying through Twitter feeds. Particularly hot models have accompanying videos and relevant information. Additionally, product information, such as who is wearing the product on the field of play (celebrities and athletes), and even social media commentary on the product, are available in real time. The customer can make the purchase right then and there by checking out on an available tablet.

Location: the ultimate goal is to have the wall in every retail location along with select wholesale (reseller) locations as well.

Retailer: LensCrafters
Innovation: Virtual Fashion Shoots

Objective

The LensCrafters Company needed a way to ingrain the current obsession of fashion culture into the stores. Therefore, Ogilvy Digital for LensCrafters got consumers who visit the store to understand that glasses were not just a necessity, but could be a fun fashion accessory. To enhance their in-store consumer experience, the campaign encouraged consumers to try on glasses to get their photos taken.

Added Value:

LensCrafters wanted to make people believe that the brand stands for fashion, so they needed to engage consumers actively in the store. In order to do so, they needed to innovate the way people try the product on – they wanted consumers to feel fashionable and glamorous when trying on LensCrafters glasses. From this insight, the in-store fashion shoot idea was born. They deployed camera-equipped interactive installations into LensCrafters stores that re-defined the product trial experience. Instead of staring indifferently into a mirror, a virtual fashion shoot experience was created.

Outcome:

Hundreds of consumers are enjoying a more fashionable product trial experience every day in LensCrafters stores across China. Early internal brand tracking metrics show a clear increase in fashion attributes associated with the brand. The virtual in-store fashion shoot experience enables LensCrafters to grow their CRM database steadily with consumers' contact details.

Concept:

Ogilvy Digital released that the Chinese consumers loved to have their photos taken and shoot self-portraits to express themselves. To ensure the customers felt fashionable and glamorous, LensCrafters China set up a virtual in-store fashion shoot. To encourage these photographs, all the customer had to do was stand in front of a mirror that would host a virtual shoot experience and walk you through it with a professional photographer. Once the fashion shoot was over, customers could edit their fashion shoot look book before uploading it online. This innovative in-store virtual retail gimmick is an excellent way to provide a fun and interactive way to connect to the youth market that connects companies to social media.

Location: over 20 stores across China

Retailer: Pull & Bear
Innovation: Interactive window shopping

PULL&BEAR

Objective

The digitalization of the new Pull & Bear store in Plaza de Lugo, at Coruña created three ways to make shopping a truly interactive experience. This way they allow consumers to interact with the brand and offer them an emotional experience before, during and after the purchase. The goal was to enhance sales figures and to offer their customers what they really need.

Concept:

An Interactive store window projection identifies and follows the movement of the pedestrians. To make this possible a LED screen with 4.80 x 2.80 meters was placed in the main display window of the store. It presents artistic videos that invite people on the street to interact with, as it is able to detect forward or backward movements from whoever passes by the window. Passersby have the opportunity to become the "players" of the collection videos.

A "Pull Your Look" corner was created where customers can take photos of themselves dressed up in their favorite clothes, and then post these photos on Facebook. The best picture of the week wins a voucher to spend in P&B.

On top of that, Collective Catalogues (interactive totems) are located throughout the store where consumers can check recommended looks and all the items from the brand's catalogue, as well as get availability info and share their finds on Facebook.

Added value:

Digitalization of the Pull & Bear store covers the complete shop experience: before, during and after the purchase. It brings the digital world to the store blurring the digital and the physical environment.

Outcome:

This new technology has been instated in hopes of generating increased sales opportunities through cross and upselling.

Location: store at Plaza de Lugo, in Coruña

Retailer: Prada
Innovation: Pradasphere

PRADA

Objective The aim behind Pradasphere was to create a phenomenal, unique experience, celebrating the brand's history as well as the creativity of today. Pradasphere illustrates the house's unique place in contemporary culture and explores the outside forces that shape its vision. "We hope to be able to immerse both fans and customers in the world of Prada in a way they have never experienced before."

Added Value: Curated by Prada creative director Fabio Zambernardi in collaboration with New York- based designer and writer Michael Rock and his studio 2×4, the exhibition attempts to reveal something of the Prada method. "Pradasphere is a depiction of a collective, often exuberant, wildly creative design process." notes Rock. "It is a story told primarily through things because design is a way of making in the world. And these things are extraordinary, both in their sensuality and as the manifestation of critical issues engaged by design that deals with the body— especially the female body— in such a direct way." Revolving around these diverse references and influences, heritage and history, the iconic and the idiosyncratic, Pradasphere portrays a disruptive approach to design, style, art, and culture that is unique in the world of fashion today. "Pradasphere will offer our customers a singular experience and the opportunity to shop an exclusive Prada collection found nowhere else."

Outcome:
This experiment drove plenty of positive buzz and produced standout in the ever-blurring convergence economy. Prada also created the Pradasphere book that follows the brand's 2014's takeover of department store Harrods.
Location: temporary exhibitions

Pradasphere is a special traveling exhibition, based on the concept of a natural history museum, which explores the universe of Prada through a 360 degree experience. The exhibition, which premiered in May 2014 at Harrod's Knightsbridge in London, includes artifacts and digital content that reveal the complex obsessions of Prada from fashion and accessories, to art, architecture, film and culture. A Prada timeline, short films, architectural projects, window displays, and a library of publications flesh out the taxonomic exhibition. Pradasphere was shown again in Hong Kong, and is intended to tour other cities internationally in the coming years.
From art, film, photography and culture, the only items on show were all the pieces that influenced Miuccia Prada to design the products that the luxury empire created.

Retailer: Barneys
Innovation: Digital Store

BARNEYS NEWYORK

Objective

The objective behind the recent digital transformation at Barneys was to enhance customer satisfaction using modern technology in its store in New York.

Added Value:

The mobile devices provide accessibility to additional colors and sizes as well as extend floor coverage with the ability to be where the customer is, creating a better relationship due to side-by-side interaction.

The advantages of mobile include cost and space as well as sales gains – the retailer has seen an increase in items per transaction, dollars per transaction and in productivity, according to Artie Byrne, director of financial and store systems for Barneys New York.

Concept:

Barneys NY the luxury specialty retailer updated its luxury store experience through a digital transformation. The retailer rolled out mobile POS on tablets and iPod touches as well as "the River", a digital table top in the café that allows customers to place orders, shop and blog while relaxing.

The table acts both as one giant screen and 28 individual screens, with a display interface where users can seamlessly order food, browse Barneys New York articles, products, and videos, and dine—all on the same surface.

Touching an item pulls up a content overlay and allows the user to interact with it further as well as purchase products.

Outcome

Through the digital transformation, the Beverly Hills store was able to reduce the number of registers from 24 to four, allowing for more selling space. Overall, the store associates are excited about the new technology in stores, viewing it as a great opportunity.
Location: New York

Retailer: Burberry
Innovation: Digital Store

Objective The objective of Burberry was to focus on their key iconic assets, repositioning themselves as a luxury brand and moving away from creating products for the masses.

Concept: London-based luxury outfitter, Burberry, are pioneers in the marriage of premium brands and the digital space. In September 2010, the retailer launched Runway to Reality. In its infancy, the initiative allowed invited VIP customers to stream runway shows live. These customers were also provided with an iPad that could be used to order items directly from the catwalk. While this click-to- buy function has now been extended to all customers and visitors of Burberry.com, the brand continues to search for new ways to personalize their shoppers' experience. Burberry Bespoke launched in 2011, allowing users to design a custom trench with their own choice of style, fabrics, color and accessories. The 44,000 sqft building incorporates a digitally-enabled gallery, 500 speakers, and 100 screens including the tallest indoor retail screen in the world, which engages customers through emotive brand content. There are mirrors that can turn instantly into screens with runway footage and exclusive video, and satellite technology enables the livestreaming of events into the store. Bespoke digital signage features in key areas, meeting customers with adaptable multimedia content. Store associates use iPad apps that provides purchase history and customer preferences to enable a tailored shopping experience. Burberry provides its sales assistants with access to each customer's purchasing history and thus enables them to create an ultra-personal experience for the customer. Other clever tricks include the use of radio-frequency identification technology (RFID), which triggers related catwalk footage when some products are taken into a fitting room, or near a video screen. Its recently launched Beauty Box concept store in London's Covent Garden, meanwhile, allows customers to virtually try on new colors. The company even introduced In- Tweet purchasing.

Added value:
This melding of two worlds, the storied history of a prestigious fashion empire and the digital world we live in, has been successful in giving consumers the luxury products they truly desire in the fast, effective and convenient manner they have grown accustomed to.

Outcome:
Burberry's continuing focus on digital has helped them to become one of the most popular and admired brands in the world. With an exceptional rise in sales, almost 14% higher than the rest of the luxury fashion market, consistent outperformance of competitors, and an incredible rise in stock value, Burberry is surpassing all targets.

Location: London, Regent Street

Retailer: Gucci
Innovation: Mobile application

GUCCI

Objective

Gucci wanted to redesign its digital presence and embrace the sales opportunity in mobile, so it launched an e-commerce site for iPhone, iPad, and Android devices. The goal of this endeavor was to increase product sales while conveying the luxury shopping experience to customers on smartphones and tablets.

Added Value:

Gucci is one retailer leveraging mobile app technology to bolster customer loyalty. The luxury fashion and leather goods brand lets store associates access vital information such as market basket analysis via a mobile device. As a result, associates can determine which products to upsell to a shopper based on his or her unique purchasing history and buying preferences.

Store associates are not only armed with an app that allows them to provide a higher level of service to Gucci's top customers but they can also recommend products that, statistically, consumers are more likely to buy.

Outcome:

A month after launching the mobile site, Gucci's revenue from mobile quadrupled, thanks to a 150 percent increase in mobile traffic. Mobile traffic now represents 41 percent of all traffic to Gucci.com and 28 percent of all online revenue.

Concept

The mobile website, which launched in December 2012, focused primarily on Gucci's products, so it used a lot of large, high-resolution images that allowed the shopper to really experience the products despite the small screen. Since luxury shoppers often purchase only one expensive item at a time, the checkout process was expedited. Once a consumer put an item in the shopping cart, s/he was invited to check out immediately. The mobile site can store personal and billing information, if the user chooses. The site also contains a message bar that includes information on sales and other offers, such as free shipping.

Gucci has been working also on new applications that even provide more interaction with the customers. Features include 'snapping' a magazine advertisement to obtain a list of all the items in the advert, watching catwalk videos and using the app to drag items into the customer's wish list, checking in at Gucci stores via Usher for personalized service based on the customer's wish list and spending patterns, and even enjoying advice on nearby premium attractions.

# Retailer: Shoes of Prey
Innovation: Design Studio

Objective Shoes of Prey is a global, multi-channel retail brand that enables shoppers to design their own shoes, and is currently a multi-million-dollar business. Nordstrom has pledged to spend billions on e-commerce in 2015, with 35% of their sales spent on technology over the next five years. Nordstrom wants to integrate the in-store and online customer experience to be more seamless. The idea behind the partnership with Shoes of Prey was to bring its digital offering into the physical store and to provide the ultimate shopping experience. The first „design studio" was opened at the end of 2014.

Added Value: The benefit of this new showroom concept is to give customers the ability to explore their creative side and design their own personalized pair of shoes. Every shoe style, material is on hand to better grasp the final product. Nordstrom has also employed expert stylists to help to make design decisions and to bring out different sizes and styles to try before customers buy them. Nordstrom has found a way to not only keep brick-and-mortar current, but it has accomplished this by converging technology, customization, and world class customer experience.

Outcome:
"It takes 12 to 18 months for best-in-class retail stores to break even. We are on track, which is great. The reception has been fantastic and we couldn't have picked a better partner than Nordstrom, which has a heritage in shoes.
Culturally, the US is a good fit for us." – said Jodie Fox founder of Shoes of Prey.
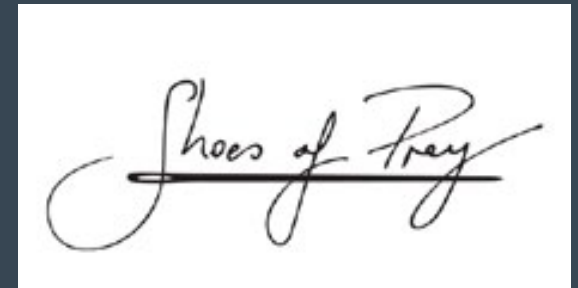
Concept The Shoes of Prey design studios located within Nordstrom stores feature mounted touch-screen tablets where customers can choose all of the elements for their shoe. An installation mounted in the studio will showcase the shoe styles available, and then the customers can use the tablets to use the 3-D online shoe designer by choosing their preferred color, material, heel height, style and ornaments. The materials available include over 170 options, with fish skin, silk, suede, leathers, and even vegan materials. Customers are able to choose sizes that include the harder-to-find shoe size, such as size 13 through 15. Half sizes are also available. To help customers make the right decision during the process, the design studios will be staffed with "shoe stylists" to give pointers or advice about custom shoes. Once designed, the shoes are available for pick-up from Nordstrom or shipped to their home in as a little as four weeks.

Location: Bellevue (WA), Paramus (NJ), Pentagon City (VA), Oakbrook (IL), Fashion Island (CA) and San Francisco Center (CA)

Retailer: Jaubalet Jewelry
Innovation: 3D Printing

JAUBALET
PARIS

Objective

Paris jewelry designer and online jewelry shop, located Place Vendôme, Jaubalet, provides custom- designed and customized jewelry using 3D printing process. The aim behind their new approach is to offer personalized and customized jewelry for their customers in a way that would give them an advantage towards competitors.

Added Value:

For those who travel to France to buy luxury jewelry, it's also about the experience as much as the pleasure of owning a unique product. The ultimate luxury is to have it handmade, and
– even better – imagined and designed by the wearer.

Jaubalet enables consumers to add unique messages, personalized info, own face shapes on jewelry and let them custom design their pieces using DYO (Design Your Own) Jewelry concept.

"We have no showroom costs, all our products are made to order, we don't have any stock, so our prices are lower, more accessible, and we offer exceptional quality," says Patrick Barruel, Commercial Development Director at Jaubalet.

Concept:

As the company revealed to Euronews, their process is simple but popular. Anyone looking for a custom ring can simply walk in to discuss their ideas and make some sketches. These are then used to create an exact 3D printed wax replica, that customers can see and judge before the final ring is created out of silver or whatever other material they choose.

Outcome

Business is booming. Clients use this opportunity from all over the world, even from China, Russia, the Middle East and Central Asia.

Location: Paris

Future Tech Innovations for Retail

Innovation: Inspiration Corridor – a live digital shop window

The Inspiration Corridor is available in Klépierre malls in partnership with creative agency DigitasLBi Paris. The interactive booth promises a personalized digital experience, as it works with a real-time body scan. It recognizes sex, age and clothes colors and also offers facial recognition. Based on what you are already wearing and body scan profiling, combined with real time product inventory from the mall, the Inspiration Corridor offers smart product recommendations.

The digital walk-in closet is equipped with giant touch screens and sensors that can refresh recommendations based on your preferences and engagement with the screens. Via a product scan you can add additional profiling criteria. You can scan your item using barcode scanning to unlock real-time personal recommendations. This innovation combines body scan, product scan and user selections to create a unique digital experience. By touching the product image, you can add it to your shopping list and synchronize it with your mobile– using ibeacon and GPS indoor. Then, a map of the mall appears to guide you to your chosen products.

Future Tech Innovations for Retail

Innovation: Scannable Window Shopping

John Lewis has joined the growing list of retailers testing QR codes with the launch of a virtual window. The retailer's top products are included in a window display at the Brighton Waitrose branch.

Customers can scan the QR codes to purchase specific featured items, and are then taken to the John Lewis mobile site to complete their purchase. John Lewis uses the launch to promote its Click and Collect service: after ordering online, customers can collect the item the following day from any John Lewis or participating Waitrose store. John Lewis marketing director Craig Inglis says:
"The roll-out of our Click and Collect service to Waitrose shops is proving incredibly popular. This new 24-hour virtual shop in the heart of Brighton takes that convenience to another level."

John Lewis' virtual shop is just the latest example of a retailer using QR codes. The most famous example was Tesco Korea in a subway in Korea, which resulted in a 130% increase with their online sales – possibly the most successful trial so far. Though QR codes have their drawbacks, they are cost-effective, and John Lewis already has a mobile-optimized site for customers.

Future Tech Innovations for Retail

Innovation: Interactive Window Shopping

A woman passing by the window display is captivated and asks her companion "Isn't that leather bag chic?""Which one do you mean? There are so many of them." The woman points to one of the bags and as if by magic, the luxurious purse appears on a display behind the shop window. Then she points to a button and the designer object rotates on the screen. "So that's what it looks like from the back." The woman passing by is impressed. She makes another gesture to zoom the bag towards her; allowing her to see every detail.

This particular shopping experience is courtesy of new type of 3D camera system from the Fraunhofer Institute for Telecommunications, Germany. Its interactive shop window enables people passing by to display goods behind shop windows onto a screen, with simple hand and facial gestures.

Four little cameras continually record the 3D positions of the hands, faces and eyes of persons passing by and then transform them into the corresponding inputs for selecting goods, viewing them in detail and immediately purchasing them – even after business hours. Anyone interested can have product information shown such as color, material, price, availability and information on the manufacturer. The researcher adds that "the system doesn't store any personal data; only the coordinates of the body parts it recognizes are passed onto the visualization."

The interactive shop window is compatible with all displays and the shop owner can select any monitor size or type of monitor from plasma, LED, LCD, projection or re-projection screens. Beyond this, shop owners can link the system to any software already there such as content management or merchandise information system, enabling them to portray all their goods on screen. The way the payment process is taken care of is also left up to the shop owner. And there is more. The interactive shop window not only identifies how many people are in front of the shop window, but based on the gathered data it can also suggest what products and information the people passing by are interested in. Finally, it has customized greeting texts on the display to guarantee the building of rapport with the customer.

5 Conclusion and Recommendations

1. How is the fashion retail industry changing and what can a Brand do to adapt its strategies to the new trends?

Today's customers are better informed than ever; they spend less time at the stores and expect sales staff to have a very high level of expertise. Customers use offline and online sources to evaluate products, during both the information and the decision phase. Online sales are expected to rise by 41% by 2017, but customers expect brands to engage them in today's digital age. A huge proportion of retail sales still happen offline, but around 50% of these sales have been influenced at some point by digital technology.

Fashion retail brands need to adapt themselves to this new era, where the new target audience is generation "Y". The key to adapt strategies to new trends is not so much to look at how online, mobile and social media are impacting the fashion business, but more how together, 'omni-commerce' can use technology to boost sales and build brand – across all these channels. As such, brands need to streamline online and in-store experiences with high-tech specialist staff and online activity analyzing resources.

2. Which innovative technologies enhance the sales process and could lead to more leads and/or higher conversion rates?

Across the entire customer journey, every touch point is an opportunity to engage consumers. In order to make the most of digital channels, companies need to bring the best of the online world into the store, blurring the physical and digital.
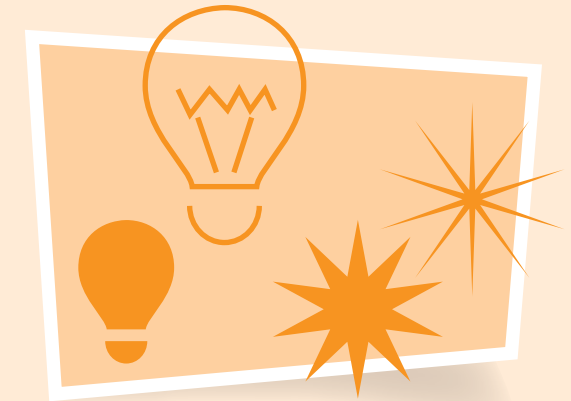
Inspiration corridor: The interactive booth promises a personalized digital experience, as it works with a real-time body scan. Based on what you are already wearing and body scan profiling, combined with real time product inventory from the mall, the live digital shop window offers smart product recommendations.

Scannable Window Shopping: Pictures of best-selling items are shown in a window display at John Lewis. Customers can scan the QR code of the item they want, which then takes them to the John Lewis mobile site to complete their purchase. After ordering online, customers can collect the item the following day. This technology is also used at the Delhi Domestic Terminal T3.

Interactive Window Shopping: a new type of 3D camera system from the Fraunhofer Institute for Telecommunications transforms simple hand and facial gestures into the corresponding inputs for selecting goods, allowing customers to view them in detail and immediately purchase them – even after business hours.

3D interactive shopping wall: It turns walls into prime selling space. On a massive touchscreen developed by Intel for adidas, customers can swipe through endless collections with just a touch of their fingertips. The 3D wall is particularly profitable for small retail stores, avoiding the necessity for huge inventory. Combined with short delivery online orders, and Click and Collect services, it is a perfect way to engage customers.

5D Experience: Procter & Gamble launched a new concept store where people are invited to interact with and experience their products using sensory experimentation. The P&G 5D Experience is an interactive operational space and entertainment goal designed by Point Creative using projection-based interactive visual display technology.

Robots: Fast fashion retailer MDS ensures that customers receive the fastest and most practical shopping experience. To compete with the online environment, they created with Hointer the **Hointer experience (click to see video)** that has 3 easy steps: reinvent in-store service with mobile devices that provide a customized experience, augment in-store marketing through social media sharing and a general online presence, and engage the robot. After deciding on a product, a robot will deliver it to your fitting room within 30 seconds. The result is reduced manpower requirement for the store and a futuristic shop experience.

What are the new retail concepts that a brand can consider in order to create an excellent customer experience and ROI?

In a recent study (Reid & Ross, 2015) the majority of respondents preferred an in-store experience, due to the ability to appraise the product prior to purchase, as their key selection criteria related to visual appearance and fit of the garment. This indicates that though we live in the era of digitalization, there are still major benefits to this platform. It also explains why in-store purchases still account for 88% of transactions.

Flagship store: New Balance has turned their NYC store into a place of personalized experience. The footwear manufacturer's goal is that **customers experience its products, the lifestyle it offers and the brand itself.** What makes the store so special is that it is not really a store, but a factory. The 4,000-square-foot showroom offers customers the opportunity to custom-build their own shoes via an in-store iPad application.

Digitalized stores bring the best of online experience in-store. Pull & Bear created three ways to make shopping a truly interactive experience. As such, they allow consumers to interact with the brand and offer them an emotional experience, before, during, and after the purchase. The P&B concept is using **Interactive store window** projection that is able to detect forward or backward movements of passers-by; a **Pull Your Look corner** where customers can take photos of themselves dressed in their favorite clothes and then post them on Facebook, and **Collective Catalogues** (interactive totems) that are located throughout the store.

Virtual Brick-and-Mortar Stores: The store provides access to a megastore assortment of basic home needs to populations in small cities. How? **Magazine Luiza's** management came up with an innovative virtual model that relies on an electronic format and four important features: no on-site products; an additional services offer; strong technological support and integration with the community. The virtual store model started with sales on video, it later moved to an online approach. In contrast to a self-service model, the store provides real customer service, and also educates consumers about this new concept.

Pop-up stores: flash retailing is a trend of opening short-term sales spaces – quite popular in fashion retail. These small and temporary shops allow companies to create a **unique environment that engages their customers** and generates a feeling of relevance and interactivity. There are various benefits to pop-ups, such as marketing, testing products, locations, or markets, and it is a low-cost way to start a business. Pop-up stores can be a fantastic and **interactive way to get people involved in a fashion event or creating engagement**, such as the YrStore promoting the O2 Campus Party Europe technology festival (designing custom T-shirts using touch pod technology) or Daisy Marc Jacobs Tweet Shop that proposes the exchange of "social currency" for free products.

Hybrid boutiques like **Citizenry** fashion café in Toronto or **Maison Kitsune Tokyo** store give a sense of inspiration, enthusiasm and emotional connection with younger people who might potentially become their customers. Anyone can walk into Citizenry to meet friends and it is a great place to combine both shopping and caffeine needs. This café offers a back shelf for retail. Maison Kitsune Tokyo fashion café also operates within the same concept. Listing hybrids we can also mention Aksel Paris New NYC Store that turns into an art gallery at night.
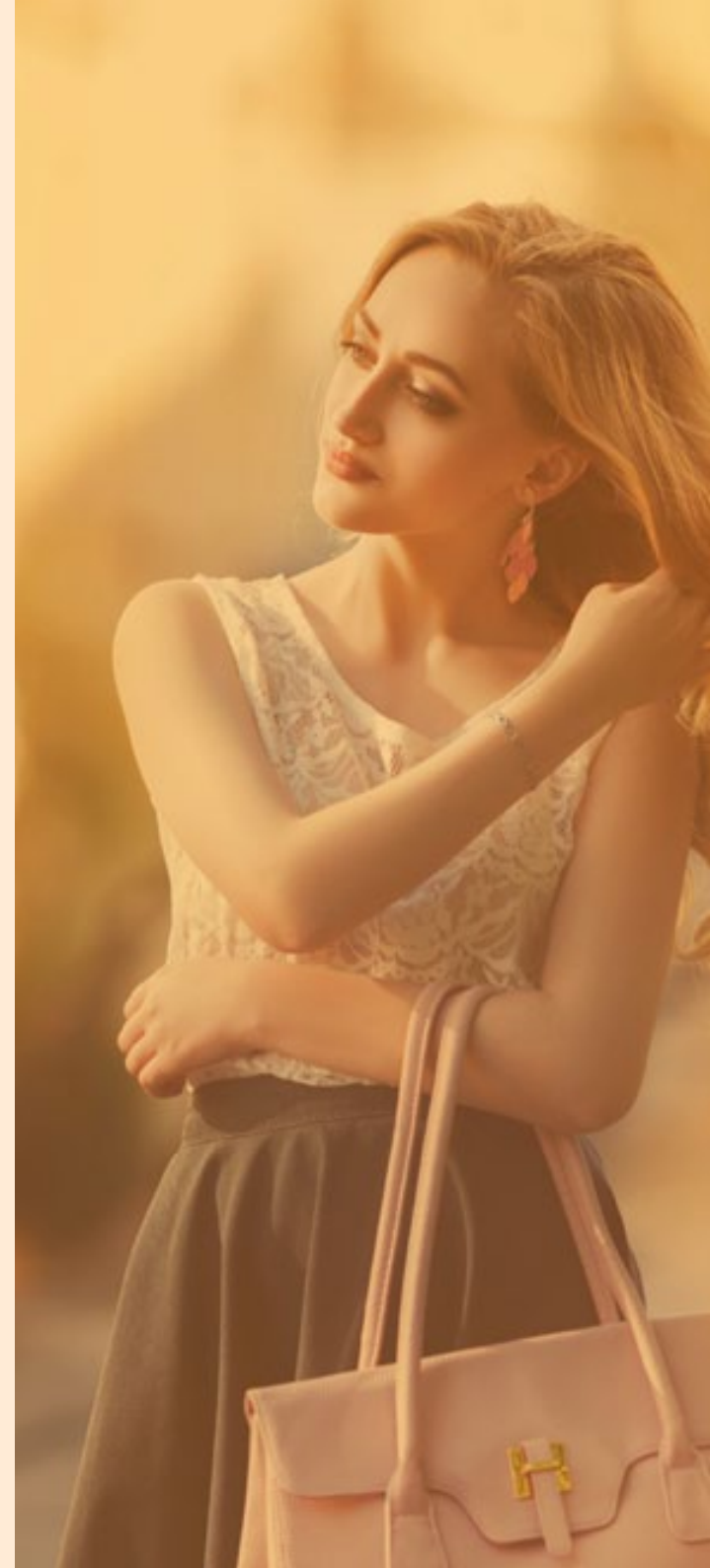
4. What are the key building blocks to implement innovative sales techniques and new retail formats?

As discussed earlier in point 3, the first action point is building a cohesive and effective multi-platform strategy that can tie together all the elements of the business from stock control to payments. The strategy also needs to ensure a smooth integration of all channels: online operations, mobile platform, social platform and digitalized stores. Make sure you keep your brand values across all channels – it will be challenging as different channels need different messaging and target shoppers in a different way.

The second action point is blurring. To bring back the brick-and-mortar shopper you need to give them something that they cannot find online. Bring the best of the online world into the store, blurring the physical and digital: "embrace the show-room experience"! There are various possibilities:

- Help consumers purchase for their families (habitual) or get the 'go ahead' (considered) with a cloud based list and image sharing functionality they can pull down from any device.
- Make it easy for them to see value beyond price with side-by-side comparisons of product features.
- Alongside price and product information, provide reviews, expert opinions and employee perspectives to enrich the experience and move beyond function.
- Take the 'show-room' beyond the walls of the store by making both functional information and more emotional experiences accessible on-the-go.
- Let customers upload video clips modeling new clothes or using a new purchase to get them more engaged.
- Encourage browsing and discovery throughout the store with in-store navigation tools and surprise deals to 'unlock' via mobile.

The third action point is personalization. A recent study by Bloom Reach (2015) found that 87% of consumers prefer to buy from the brands that are best able to personalize their experience. A Fashion Insight report confirms that 43% of shoppers choose stores because their products suit their personal taste. It is impossible to rearrange a brick-and-mortar store for each customer, but online, you can do just that.

To get the full customer portrait for personalization – rather than just a series of snapshots – you need a central data mart that combines all the contacts a customer has with a brand: basic consumer data, plus information about transactions, browsing history, and customer-service interactions. Tools like Clickfox or Teradata can help marketers gather these data and begin to pinpoint opportunities to engage more effectively with consumers across the decision journey. **Using consumer data, transactional data and product data to recommend items to website visitors is all possible, and personalizing content generates a 7.8% increase in conversions.**

- Encourage customers to interact through in-store touch screens that amplify the product features and benefits.
- Enable mobile and in-store technology to bring in-store personalization.
- Include access to reviews, expert ratings and in-store recommendations at every point in the process, both on large screens and via mobile technology.
- Enable personalization through mobile tools suggesting similar products.
- Link label content to rich mobile experience for better product information at the store.

The fourth action point is encouraging synergies between online and in-store experiences. Luxury fashion brands noticed that the stronger the online offer is, the more people come to the store. At the same time, Fashion Insight Report confirms that retailers acknowledge an immersive in-store experience as increasingly important in the face of online and especially mobile retailing.

- Validate purchases by encouraging consumers to review products and store experience in order to reinforce their choice and have them keep your brand in mind.

- Close the loop and bring the retail environment into the living room with mobile reminders and a rich online experience, continuing to familiarize the consumer with a consistent, yet serendipitous experience.

- Build a social media strategy – use it for discovery, personalization and targeting. Social media is built on authentic identity, so it has targeting capabilities that allow merchants to reach the right audience and personalize their messages in a way they cannot anywhere else.

Today, it is not enough to amaze your customers with digital technology; you also need to build the foundations of **excellent store performance** – the fifth action point. BARE International can accompany you through this journey with the ECX method. The ECX method stands for Operational Excellence, Employee Commitment and Customer Satisfaction. Our **ECX program** involves multiple touch points. 60% of all customers prefer an in-store experience, due to pre-purchase visual appraisal and fit assessment. As such, retail strategies through well- defined touch points are the key to **operational excellence.**

Employees require good training to acquire outstanding product expertise, but this is not the only factor to ensure the **employees' commitment!** To build a strong corporate brand, you need brand ambassadors, employees who are highly engaged, connected and committed. Key indicators to measure employees' commitment are performance, development and motivation. We recommend you measure this on a regular basis as part of the ECX approach.

Customer Satisfaction is the state of mind that customers are when their expectations have been met or exceeded. The achievement of customer satisfaction leads to brand **loyalty and repeat purchases**. There are four drivers for customer satisfaction, and each of them should be carefully monitored on a continuous basis:

- Satisfaction with the quality of a particular product or service
- Satisfaction with an ongoing business relationship
- Satisfaction with the price-performance rate of a product or service
- Satisfaction because a product/service met or exceeded the customer's expectations

Despite the hype around innovative digital technologies, most companies still have a long way to go in their digital transformation journeys. **Leadership is essential**. Whether using new or traditional technologies, the key to digital transformation is re-envisioning and driving change in the way the company operates. **This is a challenge to management and people, not just technology.**

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