

OMNI-CHANNEL RETAILING

CHANGES, TRENDS AND STRATEGIES



SACSC

South African Council of Shopping Centres



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Urban Studies

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Since the lion share of sales is still happening in-store, it is easy to discount the importance of online shopping, especially in South Africa where there is currently no threat. This research clearly shows that doing so would be a mistake. Consumers are **integrating** online and offline shopping methods more and more. The title of last year's multi-channel retailing report was "South Africa is far behind and will have to catch up." The main question to be answered this year is the following: **Are our retailers catching up with their offering of online shopping compared to other countries with their high quality, designer websites and online offering?**

This report will mainly focus on building on last year's results, and to highlight specific new trends that could help to develop multi-channel implementation strategies, or should it be to develop an omni-channel strategy.

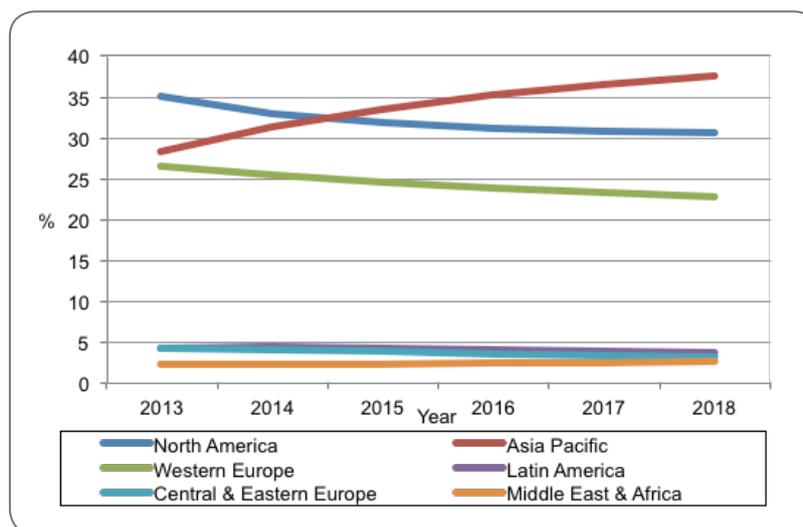
Multi-channel retailing offers customers a choice of buying products through different media. A true multi-channel strategy covers purchases from a store, purchases from a website, social media, interactive television, touch screens, tablet PCs and other mobile devices, interactive terminals, smart-televisions and mobile apps. These channels will continue to increase as we see more smart devices being developed, e.g. driverless cars and smart-fridges. The aim of a multi-channel retailing strategy is to maximise revenue and loyalty by offering customers choice and convenience.

According to the latest literature, there is a difference between multi-channel and omni-channel. The term **omni-channel** describes the simultaneous use of two channels, like using a mobile phone while in a store, or a tablet PC while watching television. An omni-channel marketing strategy is to embrace all available channels in an integrated fashion. The term is also used to describe the consistency between different channels facilitating and streamlining customer interaction.

The way people shop is continuously changing. The challenge for retailers is to incorporate new technology with existing sales channels to create a seamless multi/omni-channel experience. Not only will this improve the perception of customers, but it will also increase sales, provide better data collection and enhanced productivity.

According to the latest forecasts, Asia Pacific is expected to become the leading region for e-commerce sales in 2015, representing a 33.4% share next year, compared to 31.7% in North America, and 24.6% in Western Europe. These three regions will continue to take more than 90% of the global e-commerce. The Middle East and Africa share will remain at just above 2%

Graph 1 - Asia is leading e-commerce sales worldwide, while Africa and the Middle East are still the lowest



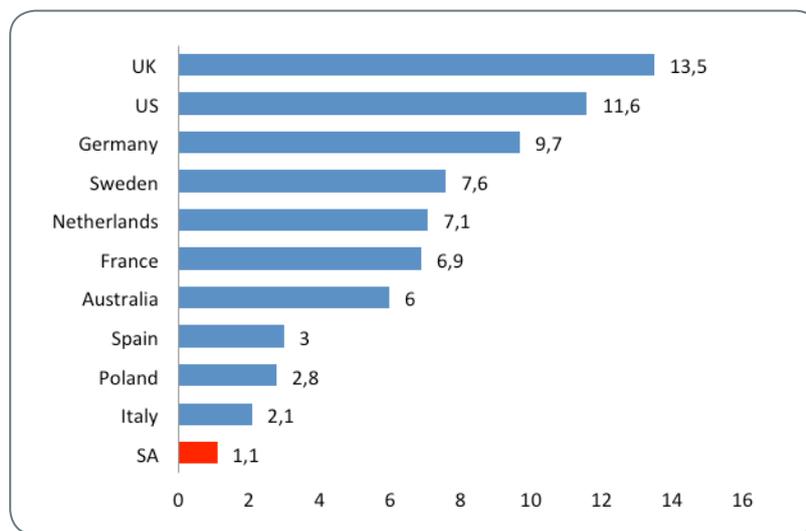
Source: www.emarketer.com, eMarketer July 2014



The online shopping penetration worldwide by region indicates that in Western Europe the total penetration can increase to 69% by 2018, similar for North America, and 51% for Asia Pacific, and 37% for the Middle East and Africa. In certain segments of the South African market, the online usage is already higher than the projected total for Africa.

The UK is one of the most advanced countries as far as online shopping is concerned with 15% of all retail sales already being conducted online. 25% of the total UK retail sales are estimated to move to online channels by 2020, driven by m-commerce (mobile-commerce) because of the high levels of smartphone penetration (BCSC, 2012:5).

Graph 2 - The UK is by far the most advanced with almost 15% of all retail spend already online

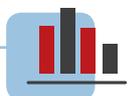


Source: Centre for Retail Research Online retailing UK 2014

In the light of all the information provided, the following facts are critical: Retailers that successfully fulfil the challenges of omni-channel retailing will help to ensure their survival, while those missing the challenge will likely face severe problems.

How will South Africa catch up with the rest of the developed world? This report is the first to track the progress and changes since the first study in 2013, and to highlight focus areas for the next five years.

Building on last year's results



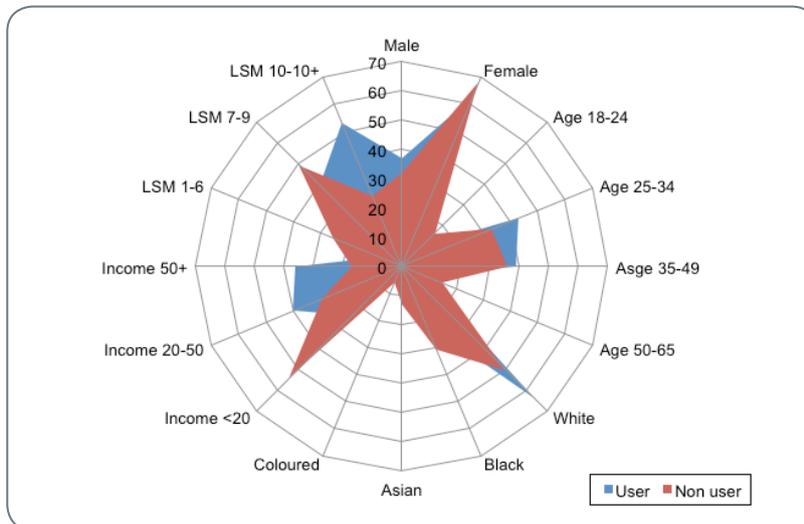
During April 2013 the first multi-channel online shopping market survey was conducted amongst 600 shoppers at five super regional and regional centres throughout the metropolitan areas of South Africa. The focus was on shoppers in LSM 6 – 10+. Interviews were conducted during April and May 2013. The main objectives were to understand the online shoppers and to distinguish these shoppers from shoppers **not** buying online. The 2014 survey followed the same methodology and was conducted during June and July 2014. In the following section the comparisons, differences and trends will be analysed.

During 2013, it was established that according to this particular survey **42%** of the shoppers interviewed were already online shoppers. This figure has remained **more or less the same** for 2014. The profile of the online shoppers also remained very consistent, indicating that most of the shoppers are **millennials**, born between ± 1977 and 2000 (no specific definition exists), the average income of the online shoppers is R37 000 per month and is mainly in LSM 10 and 10+.

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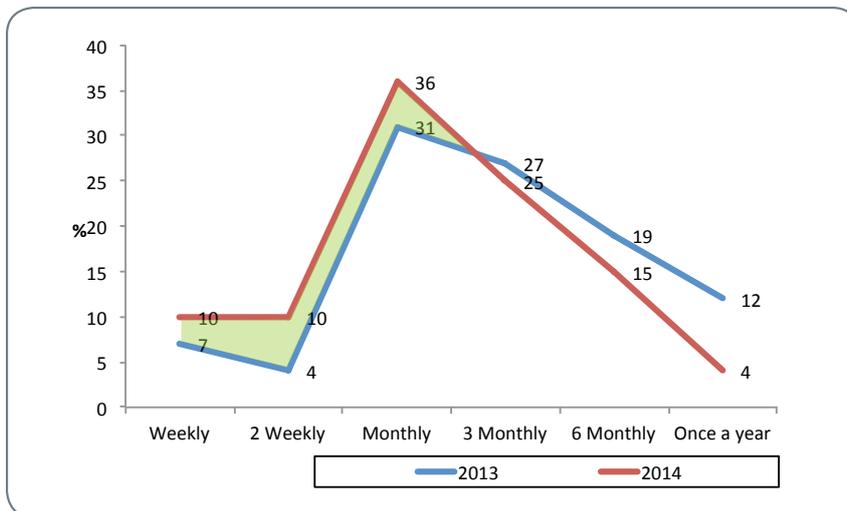
Graph 3 - Online shoppers are younger and earn much higher incomes



Source: Urban Studies, 2014

One of the **outstanding differences** between 2013 and 2014 is the increase in the regular use of Internet shopping. Weekly, two-weekly and monthly usage have **increased** substantially. In total, heavy users conduct **±50** transactions per annum, while light users conduct only **14** transactions per annum. Heavy online shoppers already spend on average **R2 436** per month, while light users still spend **<R330** per month.

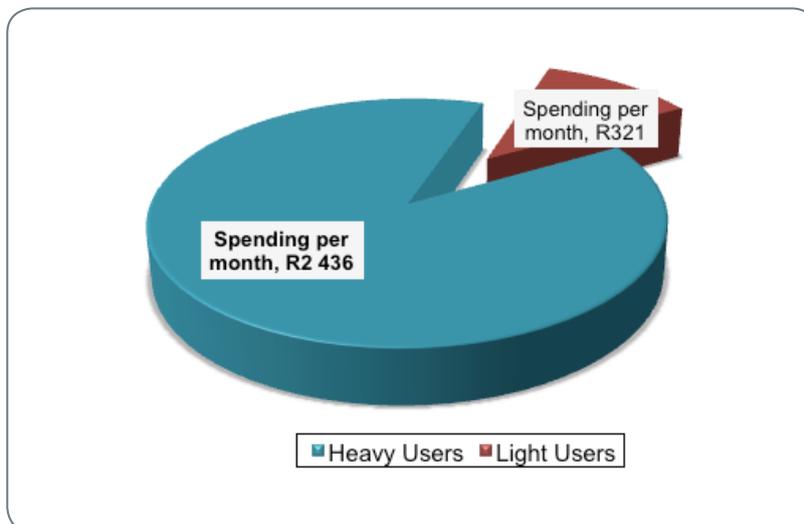
Graph 4 – Heavy users shop at least four times per month online



Source: Urban Studies, 2013 and 2014



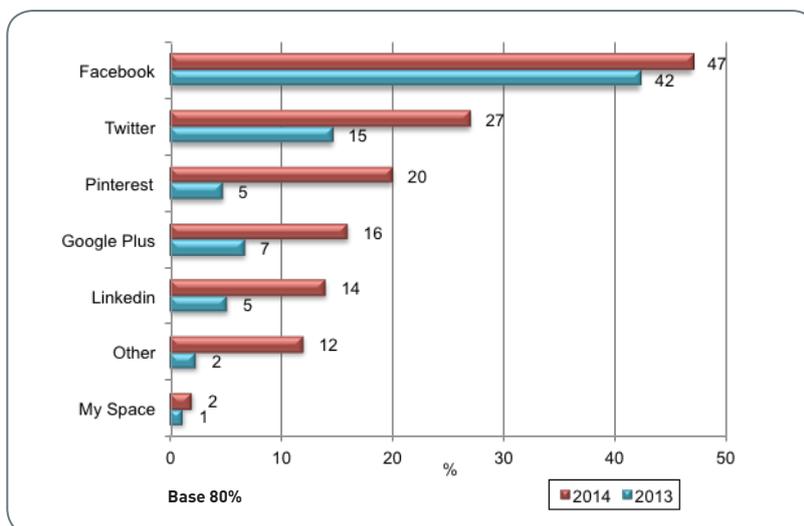
Graph 5 - There is a major difference in monthly spend between heavy and light users



Source: Urban Studies, 2014

The different social media increased during 2014 as a main source of information. Facebook and Twitter remain the most important, followed by Pinterest, Google Plus and LinkedIn.

Graph 6 – All different social media categories are showing strong increases in usage since 2013



Source: Urban Studies, 2013 and 2014

The dominant reason for shopping online is **convenience** and the comfort of buying from home. This was mentioned by **46%** compared to **49%** of respondents in 2013. One of the most important increases in the reasons for buying online is the **wide variety of choices** to choose from. This is now in second position at **12%** compared to last year's **7%**, indicating that more stores are online and the variety is increasing. Other reasons for buying online include faster, cheaper, and availability of products worldwide.

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Table 1

Most important reasons for shopping online	%
Convenient/comfort of my own home	46
Wide variety of choices	12
Faster	11
Cheaper	9
Can shop worldwide	9
Not restricted to business hours	4

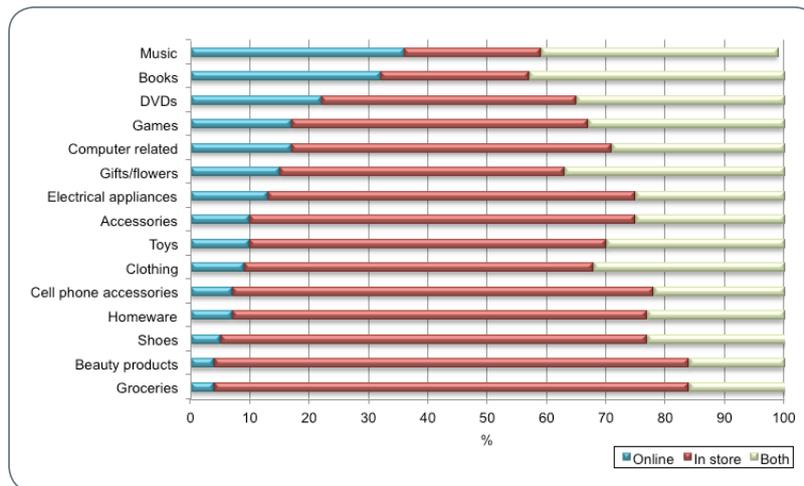
One of the most important **disadvantages** of online shopping is the fact that you cannot see or touch the product. There are also concerns regarding the security and safety of credit card information. Some of the shoppers feel there is no guarantee regarding the quality of the products. During the year the **return policies** have improved, and therefore a decrease was observed in the number of people who fear that the product cannot be exchanged.

Table 2

Disadvantages of shopping online	%
Cannot touch or see product	32
Security of credit card	18
Not certain about the quality of the product	14
Slow delivery and non-delivery	12
Product cannot be changed/exchanged	5
Wrong product brand delivered	5

In-store purchases are still the highest for electrical appliances, toys, clothing, homeware, groceries and shoes. There are already a number of shoppers combining online shopping with that of a physical visit to the store. Doing research online and then shopping in store, is done by **63%** of the shoppers.

Graph 7 – Products bought online, in store or both 2014

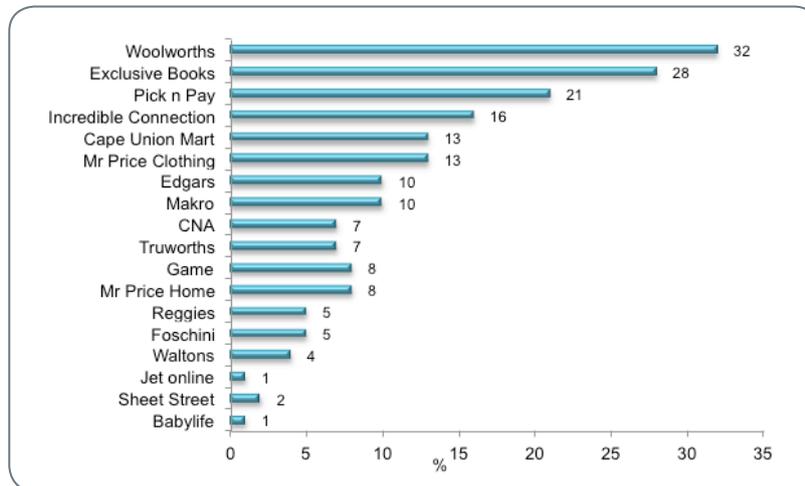


Source: Urban Studies, 2014

The online shoppers were asked to indicate whether certain retail websites have been used during the last 12 months. The highest support was for Woolworths, Exclusive Books, Pick n Pay, Incredible Connection, Cape Union Mart, Mr Price, Edgars and Makro.



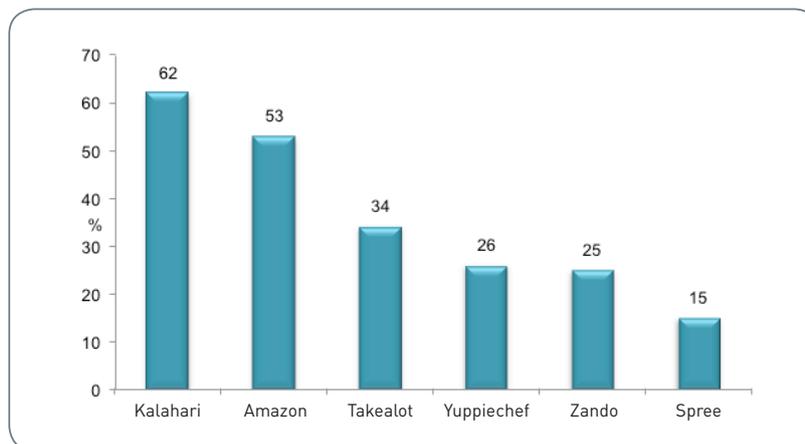
Graph 8 - The following retail websites were used in 2014 to do online shopping



Source: Urban Studies, 2014

For the first time respondents were asked to indicate the support of international and South African online stores. The highest support was for Kalahari, followed by Amazon and Take-a-lot. Currently there are amalgamation talks between Kalahari and Takealot. The two main clothing online stores, Zando and Spree, are still on **lower levels**. Spree is very active in advertising in many Media 24 Publications and on TV. Online clothing shopping has already increased from **6%** in 2013 to **9%** in 2014. This is still early days and will show strong growth in future.

Graph 9 - Yes, I have bought from the following online stores during 2014



Source: Urban Studies, 2014

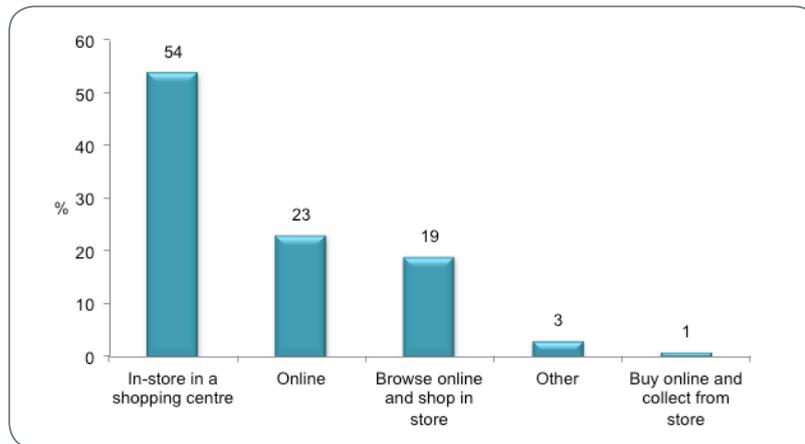
The majority of the online shoppers indicated that in the case of click-and-collect, a trip must still be made to the store. 39% of the respondents were positive about click-and-collect. It is also expected that once the online shoppers become aware of the advantages of click-and-collect, this method of online shopping will increase in popularity. In total **54%** indicated that they will make use of click-and-collect in future.

54% of the online shoppers indicated that in-store shopping will still be their preferred method of shopping in future, while 23% indicated that online shopping is **already** their most preferred method of shopping. It is also expected that more will do research online before buying in-store.

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Graph 10 - The majority will still prefer in store shopping in future



Source: Urban Studies, 2014

At the moment, 79% of the products bought online are delivered by **courier** to the home or work address of the shopper. Registered post has decreased, as well as delivery by the company. The current Post Office strike is not positive for online shopping. Specific shopping centres in America are working towards a same-day delivery service. Shopping centres are introducing these services to provide their shoppers and retailers with an exceptional experience that meets their evolving demands.

Online shoppers were asked to indicate how online shopping could be improved in future. The majority asked for a better and wider variety of products, more retailers to offer online products, and to control credit security. It is clear that the online offering is driven by convenience, product range, security and speedy delivery.

Graph 11 - Recommendations to increase future online shopping

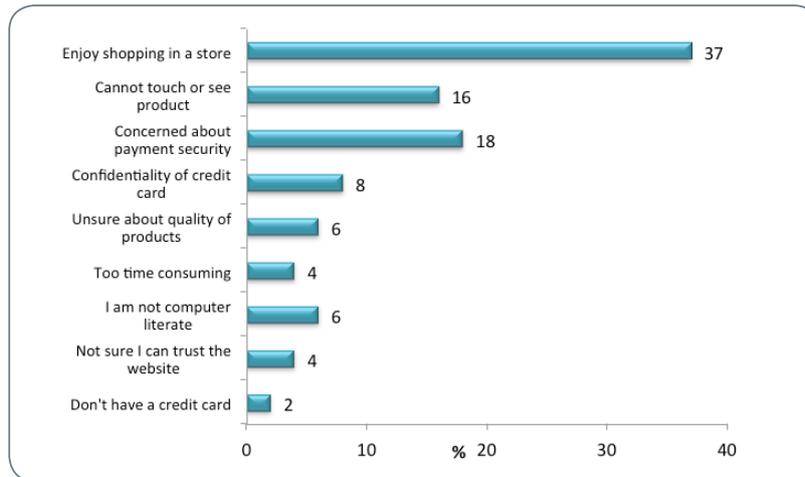


Source: Urban Studies, 2014



59% of the shoppers interviewed are **not online shoppers**, mainly because they still prefer shopping in a store. They would like to see and touch the products, and they are still concerned about credit card payment and security. Most in-store shoppers also fill an immediate need or want. In-store shopping also provides a “one-stop” shopping satisfaction. In South Africa 98% of total retail spending still takes place in stores.

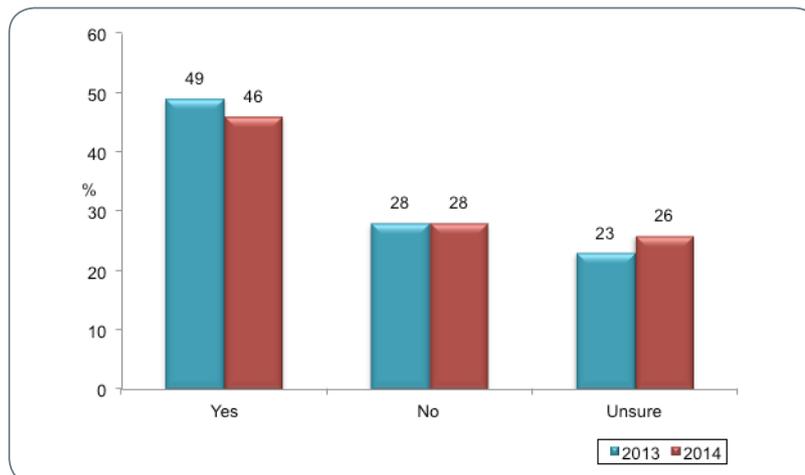
Graph 12 – Why I don't do online shopping



Source: Urban Studies, 2014

Compared to 2013, more or less the same number of non-online shoppers indicated that they **would consider** using online shopping in future. The number of shoppers who are very sure that they would never use online shopping, **remained at 28%**.

Graph 13 - Consider using online shopping in future



Source: Urban Studies, 2013 and 2014

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Most shoppers who do not buy online are already connected to social media. 73% are on Facebook, 25% on Twitter, and 20% on LinkedIn. 15% of these shoppers indicated that social networks will definitely influence them to become online shoppers.

An online shopper evolves by getting engaged with social networking sites first, then start making travel or e-line bookings online. Only later will users typically start to buy physical goods online, with first time purchases often being readily comparable products such as consumer products, electronics or books. Much later will they become dedicated online shoppers, and will start purchasing fashion online.

Online websites have improved dramatically during the last 12 months in terms of speed, display, interactive photographs, enlargement of photographs, different colours, and very large product variety. There are also much better and more flexible return policies in place for most of these online stores. It is clear that the market is still in a very strong developing phase, and retail stores should focus on attracting customers back into the store through the click-and-collect concept, better advertising, and a very good strategy to offer omni-channel opportunities to its customers.

Shoppers want to experience a product as much as possible, both online and in store. More and more customers are doing research online before buying in store. That is the main reason why the omni-channel strategy must in all cases offer an **experience** to the shoppers. The line between an in-store shopper and an online shopper almost does not exist anymore.

The research highlighted the following trends compared to 2013:

- a consistent $\pm 41\%$ of shoppers interviewed in the same shopping centres as last year are already online shoppers;
- frequency of online shopping as well as the amount spend has shown a strong increase;
- the user profile is the strongest amongst Millennials, earning on average R37 000 per month and in the LSM 10 and 10+ segments of the market;
- 46% of non-online shoppers indicated that they will become online shoppers in future.

Impact of online shopping on bricks and mortar



Will physical stores simply become showrooms in future, or will they remain the focal centrepiece of any successful omni-channel strategy?

Some retailers have ceased operations; others are reducing their store numbers or store sizes. Examples of store-closing announcements in the United States in 2013, partially due to the growth of e-commerce, include Barnes & Noble, closing up to 240 stores out of 689; Best Buy (up to 250 stores out of 1056 units); Office Depot (up to 150 stores out of 1 114 units); Sears Holdings closed 125 Sears and 225 Kmart units, out of a total of 2 118); and Radio Shack (up to 550 units out of a total of 4 412). (Kircher, Hermann, 2013, Retail Property Insights, Vol 20, (2)).

There has been much talk about how Britain's high streets are entering their death throes, their inevitable decline accelerated by the overpowering threat of e-commerce. According to the Javelin Group (www.Sanderson.com: **The death of the High Street**), the share captured by e-commerce will grow from 14% to 34% of retail sales by 2020 and sales through stores will decline from 86% to 66%. Other sources refer to 20% of all retail sales which is much more realistic. Nevertheless, the impact on stores will be stark if nothing is done.



Impact of online shopping on bricks and mortar



"It's no longer enough to merely have a website that complements your brick-and-mortar presence; retailers must start to develop interactive experiences which merge physical and digital channels. E-commerce must be complementary to brick-and-mortar retail, as omni-channel customers tend to shop more frequently (up to 3 times more) and spend more on average than single-channel shoppers.

Macy's commented, "The Internet is actually making some stores stronger than they might have been otherwise." Effective omni-channel strategies increase the number of ways retailers can interact with consumers, and ultimately increase net sales.

E-commerce must help physical stores succeed. Far from destroying physical stores or the mall industry overall, the Internet is, on the contrary, helping both. "Online combines, not competes, with offline."

Neither should retailers or landlords fear "showrooming," whereby shoppers physically inspect goods at a store, but then actually make the purchase online. In fact, far more shoppers do their research online, and then go to a store to purchase than vice versa.

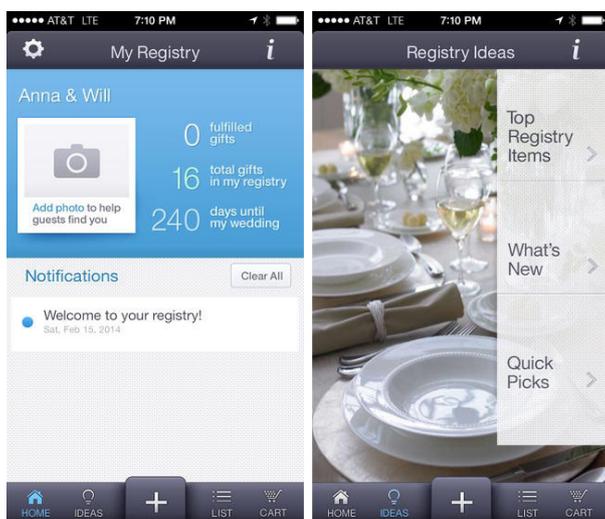
Physical stores stand to gain from the Internet, because modern consumers want "instant gratification," and only stores can deliver that currently. Shoppers are increasingly using stores as pickup points for merchandise they have bought online.

Consumers are ultimately happiest when given a full range of options. "We should try to make it as easy for the customer as possible, and as enjoyable," (**WWW Metrics – The Growth of Online Shopping.** <http://www.wwwmetrics.com>).

Examples of companies doing omni-channel retailing right



The following are five examples of stores doing a very good job with web design and ease of conducting business online, according to the article Multichannel Merchant by Jaxon Trout.



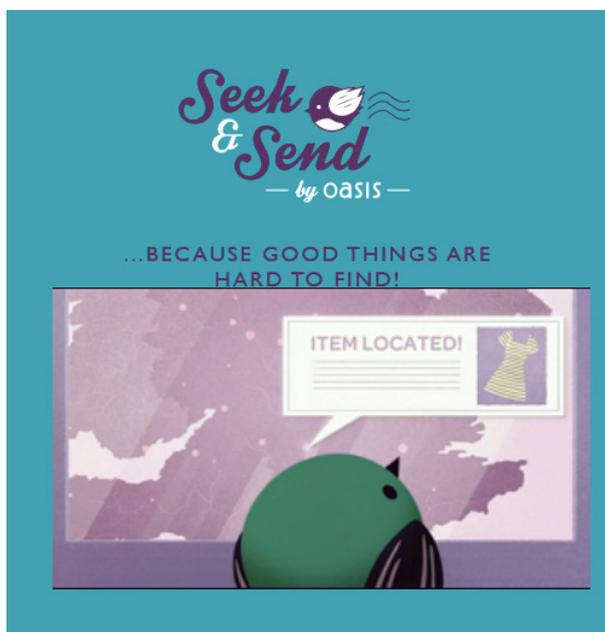
Crate & Barrel

The company recognises that many shoppers switch from web to smartphone to tablet PC when conducting research and completing purchases, so when customers are signed in, the C&B app saves their shopping cart so they can access their information across multiple devices and browsers.

This enables them to pick up where they left off, no matter where they are in the shopping process.

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Oasis

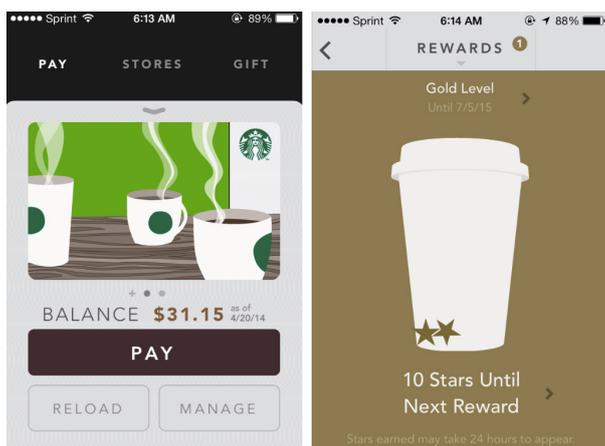
UK fashion retailer Oasis has an e-commerce site, a mobile app, and several brick-and-mortar locations, and it does a pretty good job in fusing those channels to give people a great shopping experience.

Oasis arms its in-store associates with iPads to give shoppers on-the-spot information on product availability. This also allows the staff to ring up customers from anywhere in the shop. And if an item isn't in-stock, the staff can use their iPads to place online orders for the customer.

A similar service is made available for online shoppers. If an item is sold out online, customers can use Oasis' "Seek & Send" service where the retailer searches its stores for the product and ships it to the shopper. Once the item is located, Oasis will send an email to notify shoppers and let them track their goods.

In addition, Oasis provides convenient (and free) options when it comes to returning items. Aside from letting people ship their items back or return them by heading to any Oasis branch, the retailer also offers easy returns through a service called Collect+ that allows shoppers to return purchases through a network of over 5 500 drop-off points in local stores, including convenient stores and grocery stores, allowing customers to return items outside of the normal 9 to 5 post office hours.

Starbucks



The Starbucks rewards app is frequently mentioned in "top" lists of omni-channel efforts and for a good reason: the coffee company does an excellent job in providing a seamless user experience across all channels. This is an excellent example of an omni-channel that works.

Customers have the option of checking and reloading their Starbucks card balance through their phone, the Starbucks website, or when they're at the store. Any balance or profile changes are also updated in real-time, across all channels, letting users stay in-the-know no matter where they are or what device they're using. Plus, any earned rewards are automatically reflected in the account without any action on the user's part.

When it comes to payments, people can either pay with their physical rewards card or using their phone, and the balance will automatically be updated online and on the app.



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- View past purchases and products you love through My Beauty Bag
- Scan products in store to read Ratings & Reviews



ADD SEPHORA TO PASSBOOK
Keep a digital version of your Beauty Insider Card to make in-store checkout easy. Plus, you can store and organize all your Sephora gift cards

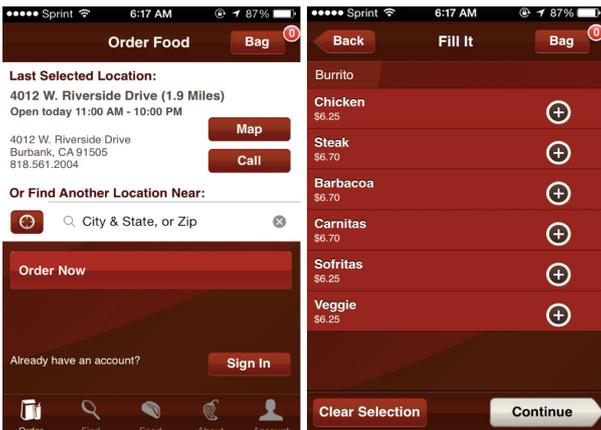


Sephora

Through its “My Beauty Bag” program, cosmetics retailer Sephora makes it easy for its loyal customers to manage their “loved” products and purchase history from any device.

Sephora’s Beauty Insiders (i.e. members of its reward program) can use their Beauty Bag on their phone or on their computer to view and track their purchases and rewards. They can add items to their shopping list, view their buying history, save items for future purchases, and easily re-order items.

Shopping is a breeze with the ability for users to purchase products right from the app itself. Alternatively, when they’re in the store, they can use Sephora’s app to access their shopping list to complement their in-store experience.



Chipotle

Chipotle Mexican Grill is utilising multiple channels to enable customers to place orders wherever they are. People can place an order online for pick-up at the nearest Chipotle location, and they can also use its official mobile app to order on the go.

Additionally, if they create an account, users will be able to track past orders and save their favourites for faster ordering in the future. Account information can be accessed both online and using the app.

To pull off a successful omni-channel strategy, a retail store needs to determine the key tasks or actions that customers perform throughout the shopping experience, and then let them accomplish those tasks across multiple channels. Omni-channel retailing isn’t solely about selling across multiple channels; it’s also about letting the customer do whatever it is they need to do throughout their shopping journey, no matter what device or platform they’re on. **(Jason Trout, Multichannel Merchant, May 14, 2014).**

Future? Omni-channel!



Consumers are continually pushing retailers to improve the shopping experience, whether it’s in store, online, or a combination of the two which is resulting in a gap between consumer expectations and the actual shopping experience.

With **mobile**, customers are empowered like never before. With more than 70% of daily Facebook and Twitter users on a mobile device, digital marketers must think mobile-first. Brands not using mobile strategies to transform the customer experience, are risking becoming obsolete. “Mobile has changed the customer experience in three ways: immediacy, simplicity and context. When consumers are using mobile, they want anytime, anywhere access to information, they want simple tasks, and they expect relevant solutions. To boost customer experience, brands should manage their customers’ expectations through mobile, since this platform allows brands to communicate with consumers anywhere at any time.

nurturing

south africa’s retail network

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Consumer feedback, negative or positive, can only help businesses. **Reviews** make brands seem human, giving them a way to reach out to customers directly, respond to criticism, and build relationships. Customers are more likely to follow through on a transaction if they can see other feedback. That, in turn, leads to better customer retention and conversion rates, as well as all-around happier customers.

Use **criticism** to improve operations: No business owner likes to see a customer complaint pop-up in a review section, but even bad feedback can help you improve your customer service, product offerings, and operations.

Prioritise **word-of-mouth** marketing: Though it seems hard to measure, the benefits of word-of-mouth marketing are very real. Customers are more likely to follow through on a transaction if they can see other feedback and thus, know what they're in for.

An informative easy-to-use website is a key element in a multi-channel retailing strategy. A high proportion of shoppers conduct their pre-purchase research on the Internet, although they may use other channels to make the final purchase.

When you operate a multi-channel strategy, you have the option of charging the **same price** for a product across all channels, or offering your customers different prices, depending on their channel choice. Offering customers website prices that are lower than store prices is common practice and reflects the lower overheads in website operations. Your customers also have a choice between lower online prices and personal service in the store. **(Ian Linton, Demand Media)**

A multi-channel strategy gives you the ability to **expand** your business on a national or global scale without investing in further physical stores. An e-commerce website can be designed to operate in multiple currencies and with local content to attract customers in many countries. You can also conduct business across multiple time zones with no restrictions on opening or closing times.

The report started with the following question: **Are our retailers catching up with their offering of online shopping compared to other countries with their high quality, designer websites, and online offering?** The answer is unfortunately, **No**. Most of the overseas retail stores are already 'fine-tuning' their omni-channel strategies. The focus is already on offering a variety of channel options with excellent websites and emphasis on the following:

- interconnected experiences is the future of consumer engagement;
- ease of doing business for in-store shoppers as well as online shoppers;
- ease of cross-channel shopping;
- ease of payment through a variety of methods;
- linking up with very good apps to make cross-channel shopping much easier;
- more/better returning options;
- all personal changes and updates occur across all channels simultaneously;
- indicating track records of historical sales, favourite products, reward points and general business history; and
- design a full omni-channel marketing strategy.

An omni-channel strategy should add more convenience, excitement, and multiple options to the customers. Their behaviour is driving multi-channel growth and if retailers want to stay in touch with their customers, **they must plan now** and formulate workable and easy-to-use omni-channels strategies.

46% of non-online users will become users in future. The challenges are to cater for these newcomers to enhance their experiences of online shopping, to embrace the heavy online users to transact more and spend more, and to ensure that physical stores offer enough excitement and drawing power to keep bringing back the customers. A well designed omni-channel marketing strategy should achieve this.



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CHANGES, TRENDS AND STRATEGIES