OMNICHANNEL IN RETAIL:
HET ANTWOORD OP E-COMMERCE

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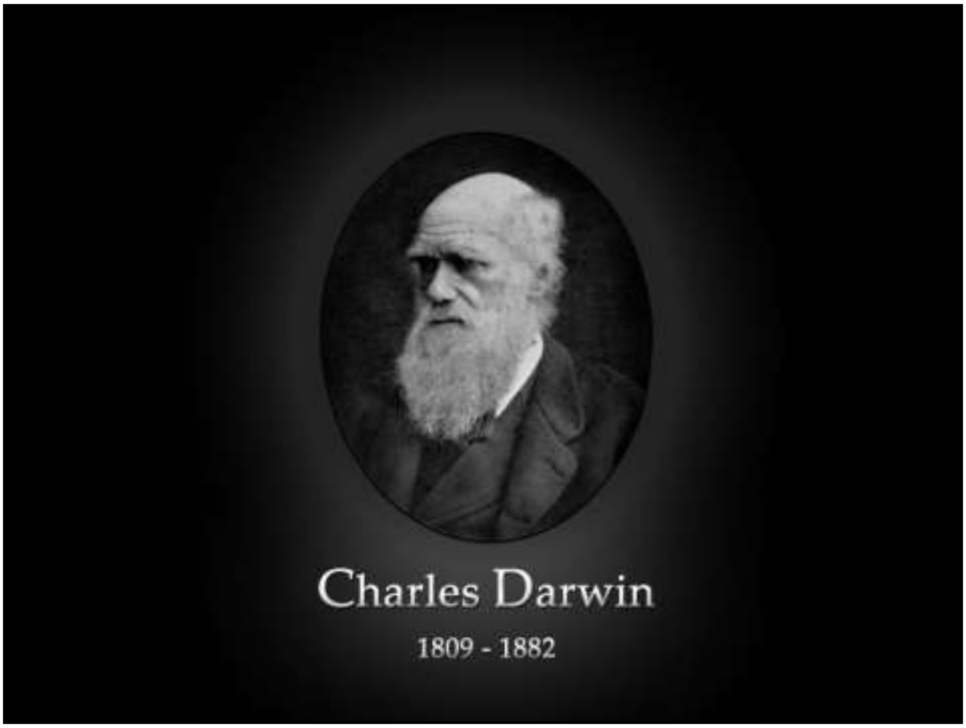

AGENDA

1. the new shopper
2. e-commerce
3. omni-channel
4. real estate
5. conclusion

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**A.D.H.D.-
generation**


NO CELL PHONES
CELLPHONES
WALK IN THIS LANE


68%
of shoppers
start shopping
trip online
hunkemöller
hunkemöller


spice up
your phone


hunkemöller
hunkemöller
hunkemöller
12%
online
share of sales

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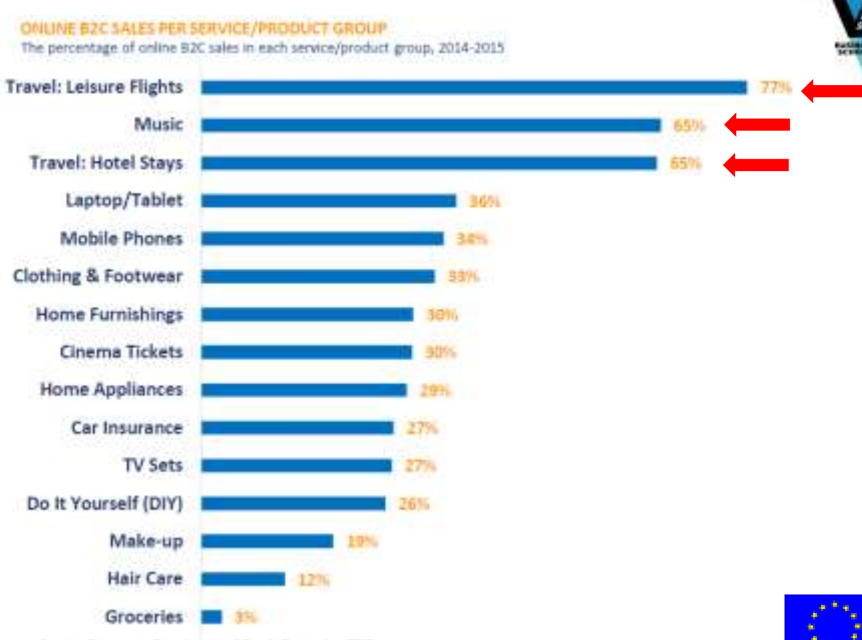
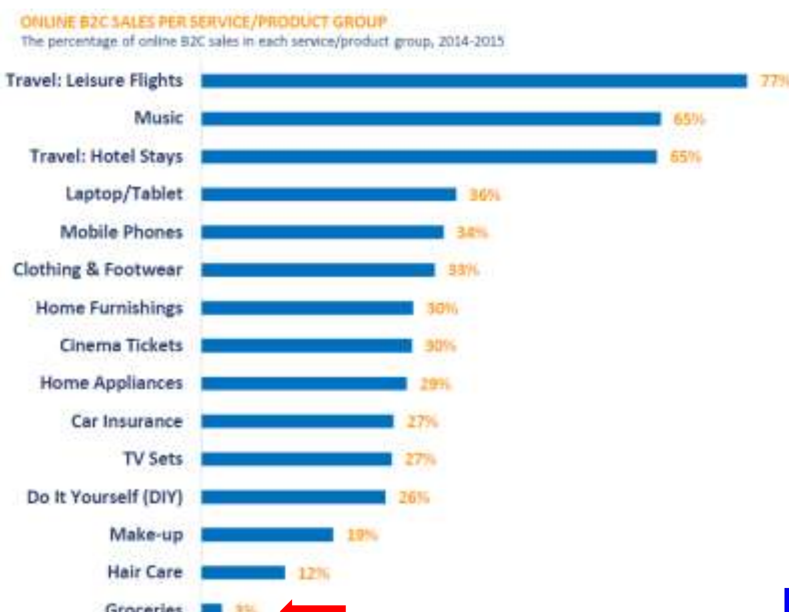
incremental | disruptive | destructive



incremental

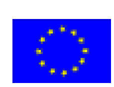
disruptive

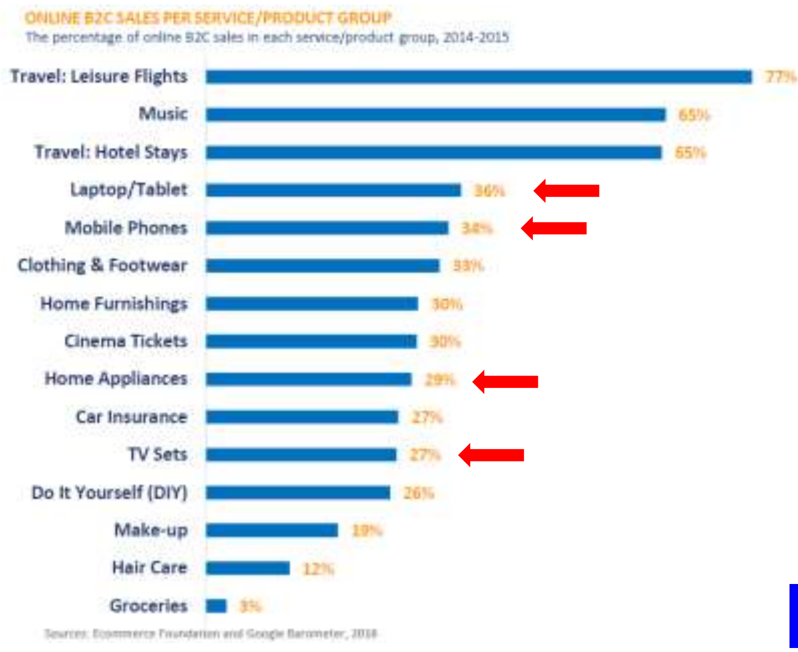
destructive

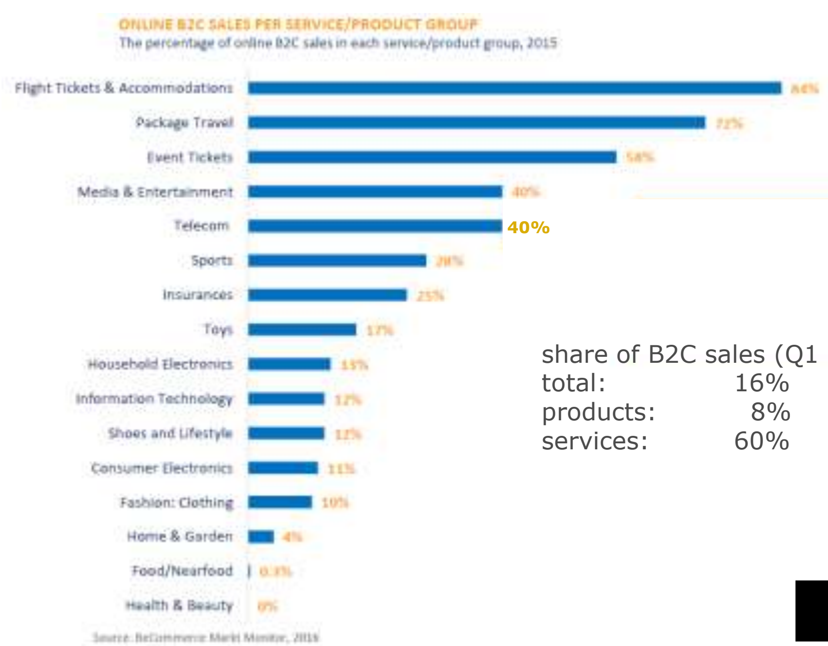




incremental **disruptive** **destructive**







share of B2C sales (Q1 2016)
total: 16%
products: 8%
services: 60%

rational

search

product

specification

long tail

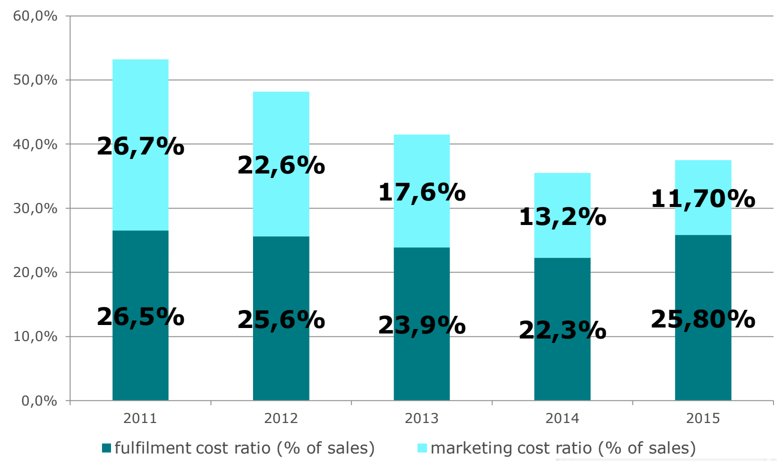
price

Bol.com: +30%

markt: +14%

Ahold company data Q3 2015 & Thuiswinkel Markt Monitor Q3 2015

FULFILMENT & MARKETING



dS De Standaard

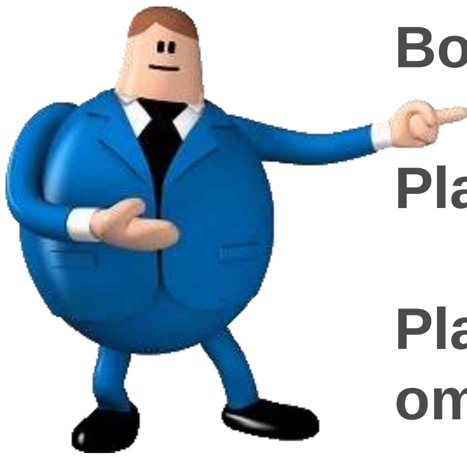
Meest recent Binnenland Buitenland Opinie Biz Cultuur Sport Life&Style Beroemd&Bizar Niet te missen Meer ▼

KLASSIEKE WINKEL WORDT AFHAALPUNT VOOR ONLINE KLANTEN

JBC boort nieuwe markt aan met verkoop op Bol.com

09 AUGUSTUS 2016 OM 03:00 UUR | Van onze redacteur Johan Rasking

De Belgische kledingketen JBC gaat zijn kindercollectie nu ook verkopen via de Nederlandse onlinewinkel Bol.com. Dat biedt JBC uitzicht op klanten die het niet bereikt via de eigen winkels of webshop.



Bol.com: +30%

Plaza: +78%

Plaza: 20% omzetaandeel

Ahold company data Q3 2015

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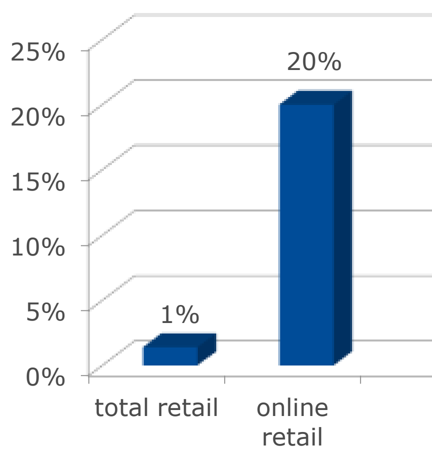
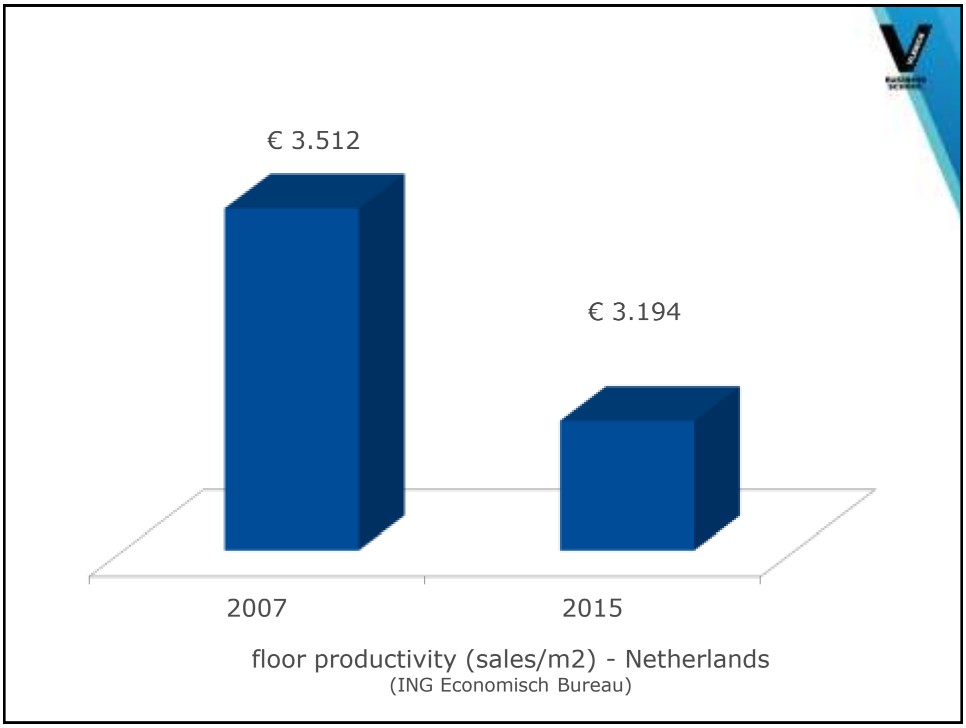
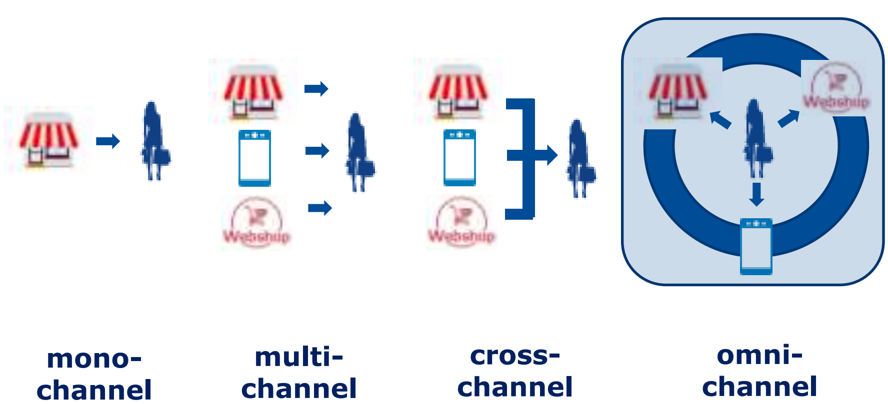


retail sales vs. year ago
(Netherlands –2015 – CBS)


€ 3.512
€ 3.194
2007
2015
floor productivity (sales/m2) - Netherlands
(ING Economisch Bureau)


digital as a threat

OMNI-CHANNEL




customer centric
commerce

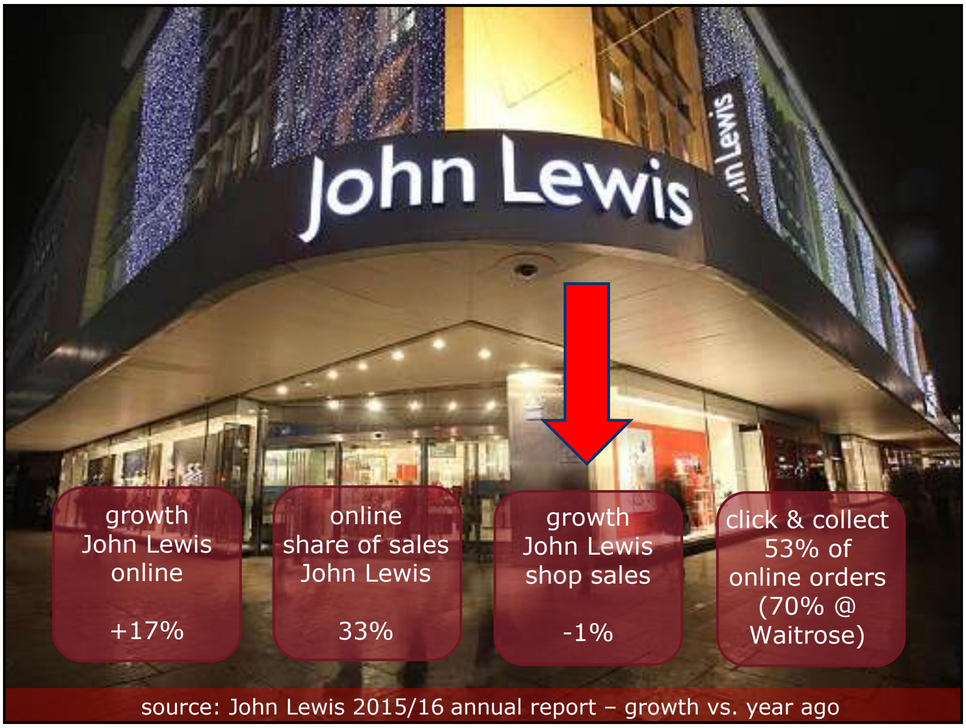

We've more
than we
can show
Shop all our menswear
online here


Want to see more?
Shop all our plate designs here, including online exclusives.

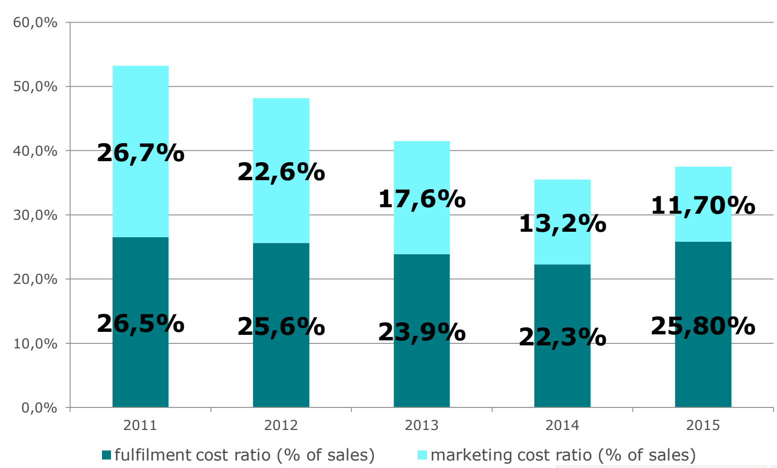

John Lewis
growth
John Lewis
online
+17%
online
share of sales
John Lewis
33%
growth
John Lewis
shop sales
-1%
click & collect
53% of
online orders
(70% @
Waitrose)
source: John Lewis 2015/16 annual report – growth vs. year ago

THE BUSINESS CASE

- sales
  - online as driver of revenue growth



FULFILMENT & MARKETING




cracking
the code


LAATSTE
9
DAGEN!
60%
OPHEFFINGS UITVERKOOP!
LAATSTE
9
DAGEN!

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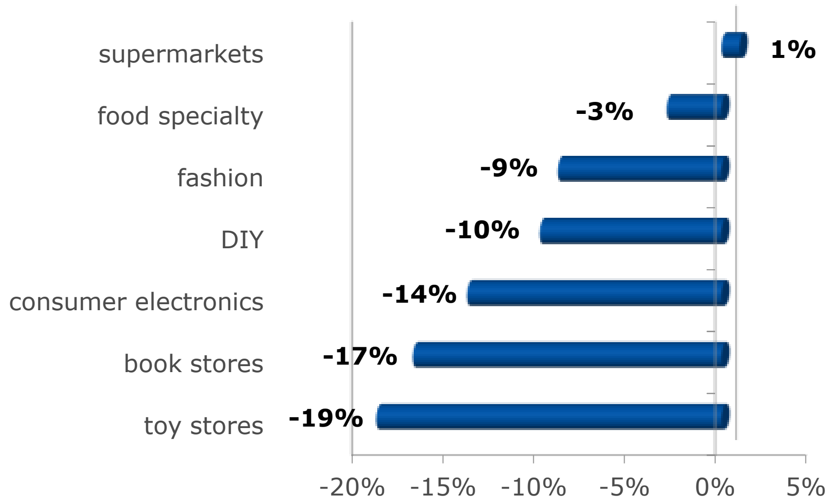
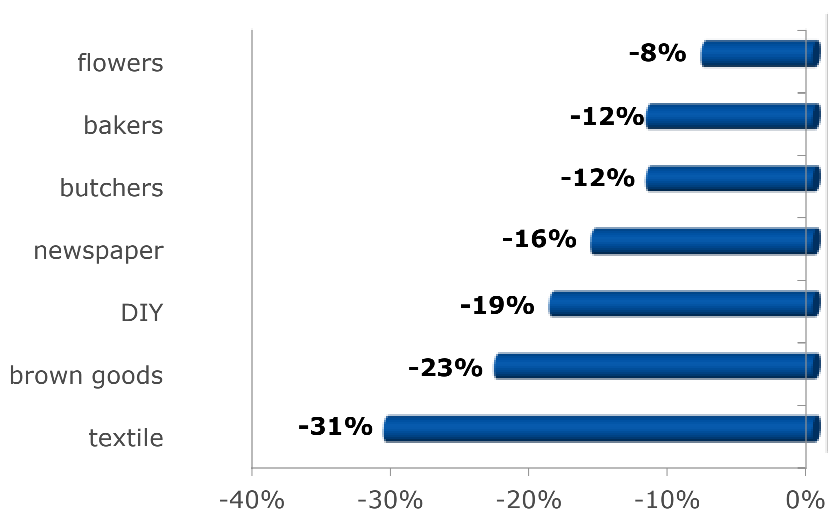
NUMBER OF OUTLETS

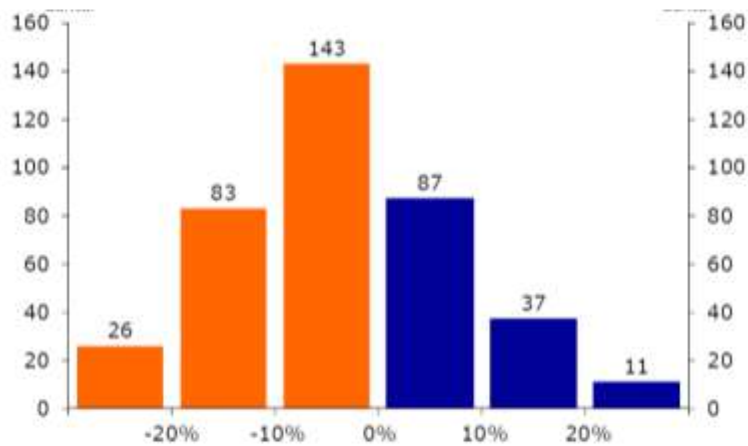


evolution 2015 vs. 2010 – The Netherlands
(CBS)

NUMBER OF OUTLETS



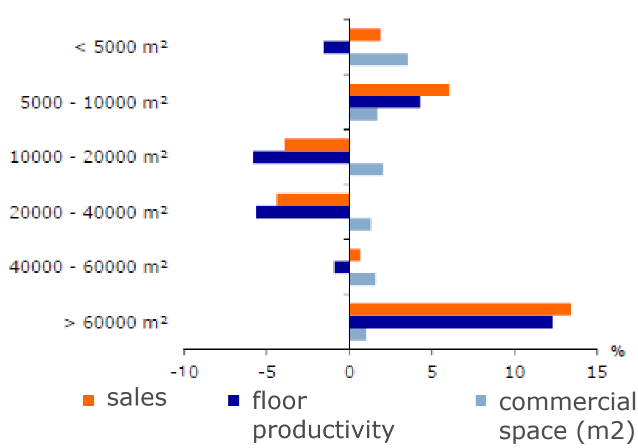
evolution 2014 vs. 2009 – Belgium
(FOD Economie)



387 Dutch cities & villages
(96% of total)

source: Rabobank – sales evolution "non-daily purchases" 2009 - 2011

IMPACT OF SIZE OF SHOPPING AREA



source: Rabobank – evolution 2009 - 2011


fun shopping:
"the winner takes it all"


UEFA
CHAMPIONS
LEAGUE


MARKS &
SPENCER
LONDON

Jupiler
PRO LEAGUE


fnac
fnac


the rule of…
ZARA
B: 27 stores
in 20 cities
& shopping malls

RUN SHOPPING: EFFICIENCY RULES

CUSHMAN & WAKEFIELD

WHAT'S DRIVING THE GROWTH OF RETAIL PARKS ACROSS EUROPE?

Retail parks stand out as locations of choice for many retailers and the nature of those retailers is changing. There are a number of traditional high street and shopping centre retailers who are testing the waters, trying to understand if retail parks are a viable option in their portfolios, alongside the traditional locations they have occupied in the past (e.g. H&M, Zara, Cólio, C&A, CCC, Vision Express).

Relatively low costs, flexible floor layouts, better logistical structure for supplying the stores, click and collect services, the opportunity to test new formats and concepts are the key drivers of growing occupier demand reflected in the generally high occupancy levels in retail parks. One stop shopping, easy access, free parking and wide range of retailers are key factors attracting customers to this retail format. Moreover, recent trends are indicating that experience is just as important as convenience. Improved designs and style and the presence of leisure and entertainment operators are having a positive impact on footfall.

2015 saw 863,000 sq.m of new retail park space complete, increasing the total European stock by 2.4% to 37.3 million sq.m as compared to 36.4 million sq.m at the end of 2014. Development activity was highest in France, Belgium and the UK which accounted for more than 60% of all retail park space added in 2015. Activity is expected to surge ahead in 2016 and 2017 with 2.4 million sq.m currently in the pipeline and expected to be completed.

"2015 saw 863,000 sq.m of new retail park space complete"

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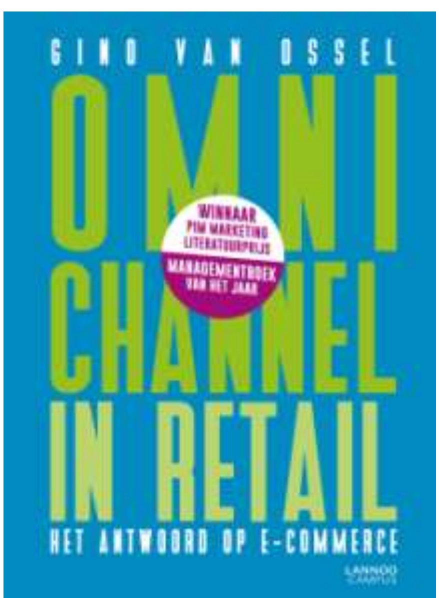

‘Dit boek biedt een stevig conceptueel kader én heel concrete handvatten! Een echte must voor al wie begaan is met de toekomst van retail!’

Wouter Torfs, CEO Schoenen Torfs

‘Een echte aanrader voor zowel retailers als e-tailers!’

Bart Claes, CEO JBC

‘Een boek geschikt voor zowel professional als leek, voor de denker en de doener, de gelegenheidslezer en de alleslezer.’

Verslag van de Jury,
Managementboek van het Jaar

Prof. Gino Van Ossel

Retail management
E-commerce & omni-channel
Shopper & trade marketing
Channel management

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