



10 Retail INNOVATIONS

A Decade of Innovation

Neil Stern - Ebeltoft USA & Lourens Verweij - Ebeltoft Group

Ebeltoft Group
International Retail Experts



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Ebeltoft Group
International Retail Experts We are a
 Global Alliance of consultancy companies
 with members in over 20 mature and
 emerging retail markets.

Since 1990 we have helped retailers
 as well as suppliers to the retail sector
 remain competitive and achieve their
 goals by blending global retail expertise
 with the member's local insight.

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

Since it was founded, Ebeltoft Group has
 analyzed global retail innovation trends
 and, since 2005 we have presented this
 analysis in our annual publication Retail
 Innovations that focuses on emerging
 trends and the most interesting cases
 worldwide.

Ebeltoft Group's global studies and
 publications include:

- Global Cross Channel Report (2014);
- Retail Internationalization (2013);
- Global Cross Channel Report (2012);
- NeoConsumer (2011);
- The Trust Factor (2011);
- Environmental Sustainability (2010).

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A DECADE OF INNOVATION

A decade ago, Ebeltoft Group published its first book on Retail Innovation. It was an ambitious effort, sourcing cases from 13 different countries*.

Early on in the development of Retail Innovations, we were not as broad in defining what 'Retail Innovation' truly meant. We focused heavily on traditional brick and mortar retail, and didn't include any e-commerce cases until our second book. Apple's development of iTunes (Steve Jobs) created the first brand to change the way we think about both retailing, and all other aspects of our lives. As we watched this trend evolve with the rapid growth and influence of e-commerce, we continued to highlight new retailers who have joined the game. Bag, Borrow or Steal was featured the following year, a pure play e-commerce site that also ushered in a megatrend of the sharing economy. Through this decade of tracking innovations, we have

highlighted trends that are deeply rooted in defining what modern retailing means today: the evolution of convenience retail, manufacturers selling direct, the rise of fast fashion, and of course, the ongoing impact of e-commerce.

Since Retail Innovations was born, the book has developed and focused on a much broader scope. We are still passionate about retail formats and concepts, but acknowledge that innovation has developed into many forms and channels. Success at retail in the future will require retailers to cultivate a multitude of skills. Learning how to deliver a customer experience while seamlessly blending an omni-channel experience together for the consumer is key.

This edition of Retail Innovations is a compilation of all the trends that have developed through the years. Each year, we are amazed by the pace of change:

- There is evidence and examples of similar formats and trends popping up in multiple countries almost simultaneously. It is apparent that consumers are adapting quickly and that the access to information is enabling trends to move at a much faster pace—the pace of change is clear.
- Great retail is still about execution and developing a meaningful experience to the consumer. It can be argued that truly “new” ideas are few and far between, but there is endless inspiration in retailing that is consistently done well.
- The evolution of omni-channel retailing is moving at a rapid pace with countless examples of new pure play e-commerce sites. At the same time, we acknowledge the important role that physical retail stores continue to play, as we see evidence of pure plays also opening stores. The success of last year's innovation winner, Warby Parker, is a powerful case in point.

“Innovation distinguishes between a leader and a follower.”
Steve Jobs

The retail environment is tougher and more demanding than ever; E-commerce is taking growth away from physical stores, the global economy remains challenged and the rapid rise of internationalization means that the competitive set facing retailers is tougher than ever before. Consumers see it all and want it all...there is little room left for mediocrity.

Building innovation into organizations has become the critical mission. Our emphasis on innovation is reading between the lines: what is the leading edge? We recognize that some of the concepts themselves may not be commercially viable, but the ideas behind them could provide a transformational spark in the future.

*We owe a huge debt of gratitude to Fabrizio Valente of Ebeltoft Italy/ Kiki Lab for initiating Retail Innovations and having the vision (and patience) to assemble this effort.

RETAIL INNOVATIONS 10

Our latest compilation of leading edge innovation, Retail Innovations 10, highlights individual ideas and the key themes that emerge from studying the whole.

This year, we evaluated 120 cases submitted from over 25 countries. A panel of expert judges from eight companies ranked the entries in an effort to create a summarized case version, in addition to selecting the top 10 cases. The top 10 cases feature a unique mix of innovations from different parts of the world. These cases clearly demonstrate the diverse aspects of innovation occurring globally, as well as the remarkable emergence of consistent themes that play out on a global basis.

- **Bilder & de Clerq** (The Netherlands) has created a recipe market, bringing together the ingredients needed to easily make a fresh and delicious meal. It integrates the power of curation, convenience and rethinking the idea of how to sell food. Bilder and de Clerq is this year's winner of the [Ebeltoft Group Retail Innovations Award 2014](#).
- **Au Boot du Champ** (France) showcases the country's continued leadership in "click and collect" with local produce being offered in pick up lockers.
- **Argos** (UK) piloted arguably the best example of omni-channel integration in their latest stores showcasing seamless in-store pickup.
- **Begendik** (Turkey) impressed our judges by taking local to a whole new level. Begendik has brought production directly into the store for all categories whether it be for dairy, produce or prepared foods.
- **Bikini Berlin** (Germany) re-imagines the traditional concept of a shopping mall by focusing on ever changing temporary "boxes" that can innovate around seasons or events.
- **Dr. Fleming** (Italy) created a unique way to address the aging population by delivering an integrated service format providing customers with quick, professional and affordable access to healthcare.
- **Hedonism** (UK) holds the UK's largest in-shop collection of wine and brings focus to design and experience of the store. With elaborate tasting space and chandeliers run on compromised glasses, the store truly defines luxury.
- **OVS 2.0** (Italy) demonstrates how on-line technologies can be put to use in a physical retail setting.
- **Selfridges Fragrance Lab** (UK) created a journey for customers to explore retail in a fun fragranced environment, but in a focused and relevant way.
- **Space Ninety 8** (US) exemplifies the future of experiential retailing: a retail store, art gallery, foodservice establishment and community center blended into an interactive space.

As we look at all of this year's examples, the following seven themes prominently emerge:

CURATED COLLECTIONS



CUSTOMIZATION



EXPERIENTIAL RETAILING 2.0



HYPER LOCAL



ONLINE OFFLINE MASHUP



RETAILVENTION



TECHNOLOGY INTERVENTION



CURATED COLLECTIONS

The heart of successful retailing lies in creating a coherent and compelling assortment for customers. It is the job of any retailer to be an effective merchant, selecting the best products they can to create a coherent offer. So, the notion of curated retailing is certainly not new; what has changed is the consumer's ability to access goods from a much broader (and global) variety of providers.



CUSTOMIZATION

This trend is reaching critical mass. Customers can now create a product that is truly their own. Retailing and manufacturing was once predicated on scale, and now we are mass producing goods to achieve efficiency.



EXPERIENTIAL RETAILING 2.0

With e-commerce growing in sales and popularity on a global basis, retailers are forced to ask more often, "What is the role of the store?" The quick answer is that it can no longer just be an efficient place to buy commoditized products. Stores are social gathering places, centers for knowledge, learning and information, a place for fun, or relaxation. They are the ultimate showcases for merchandise, exciting customers with possibilities. They are motivators to love better, eat better or beautify one's home. In short, experiential stores are wondrous places that can deliver experiences in a way that a website can't.



HYPER LOCAL

There is real power in truly being local. Having the right products sourced from the community speaks to powerful macro trends around freshness, sustainability, and supporting the local community, while attempting to keep prices low. It also compellingly speaks to safety, and the consumer's desire to become better educated and more demanding about the products they are consuming. Being truly local, and often eco-friendly, means adopting sustainable green habits that can also save money. Less packaging can lead to more efficiency, as this year's cases demonstrate.



ONLINE OFFLINE MASHUP

A new retail era is emerging. It will seamlessly blend the online and offline retail experience together, allowing customers to shop where and how they want, at any time. Online tools are being adopted for in-store use to bring the immediacy of online into the brick and mortar world. We are at our infancy in truly seeing the impact of these efforts.



RETAILVENTION

Cases in retailvention break new ground in creating new business models. From savvy start-ups to some of the world's largest companies, these new models force one to rethink the very nature of what retailing can be.



TECHNOLOGY INTERVENTION

Technology itself is not an innovation; it is what the technology enables customers to do that provides a glimpse of true innovation. There are case examples of retailers integrating the use of technology to provide consumers with more choice, more access and more information than ever before.

A decade of retail innovation has shown us that the pace of change will only continue to accelerate. Steve Jobs suggested that innovation distinguishes a leader and a follower. Innovation may ultimately distinguish survivors from victims as certain retailers fail to keep pace.

EBELTOFT GROUP RETAIL INNOVATION SERVICES

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

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

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

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

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

TOP 10 RETAIL INNOVATION CASES

Bilder & de Clercq
Argos
Au Bout du Champ
Begendik
Bikini Berlin
Dr. Fleming
Hedonism
OVS 2.0
Selfridges Fragrance Lab
Space Ninety 8



To access Ebeltoft Group's video introductions on the winning cases, scan the QR code or visit our website.

Bilder & de Clercq

THE NETHERLANDS - Amsterdam

Do you find you ask yourself each day, What am I having for dinner tonight? accompanied by the struggle to find the right products in the supermarket? Instead of being an ordinary supermarket, Bilder & de Clercq differentiates itself by offering meal solutions. The idea behind this concept is simple: a store, arranged by dishes, where all of the ingredients for that particular dish are offered in the exact amount required for either one or two people. Visitors can choose between 14 different dishes, divided over seven presentation tables. Recipes are tasty and healthy and developed by professional chefs with an emphasis on easy, fresh and homemade meals. On the enclosed recipe card, Bilder & de Clercq explains step-by-step how to prepare the dish quickly, easily and correctly. The daily dinner dilemma becomes a thing of the past!



Market opportunity

Bilder & de Clercq separates itself from other food players by delivering meal solutions, rather than letting people search for inspiration and ingredients on their own. They understand the way people live in city centres and they tackle the inconveniences this group deals with. The key message that Bilder & de Clercq wants to convey is that city centre dwellers lead busy lives and are time poor, but nevertheless want good and healthy food. For this they offer inspiration and help, two things that are often lacking at traditional supermarkets. In addition, people living in cities often do not have enough space to store a week's worth of food and therefore buy their food on a daily basis, in a location close to where they

work or live. Bilder & de Clercq offers restaurant quality meal solutions to customers who expect high quality and creative foods, but do not have the time to create meals on their own. Another common issue Bilder & de Clercq's unique product mix solves is overbuying. Because people are able to purchase the exact amount of the ingredients required at Bilder & de Clercq, shopping at this store automatically means spending less on products you will never use. This contributes to a better environment as well.

A store arranged by dish was born out of the market demand for meal solutions. Bilder & de Clercq stands for convenience, inspiration, time saving, seasonal and local recipes with a 'twist'.



Innovative Qualities

Bilder & de Clercq owes its name to its location: it is on the corner of the Bilderdijkstraat and De Clercqstraat, two streets in Amsterdam. Instead of a traditional layout of food arranged by product category, shoppers see tables, each of them dedicated to one meal. On each table, shoppers find a recipe card with information about the ingredients needed to prepare the dinner, and above each table hangs an image of the prepared, finished product. Every day customers can choose a meal to conveniently prepare at home. Every Thursday three meals are replaced with new offerings, allowing for a constant introduction of new meals. As most people shop for their daily meal after

4 p.m., the store also features fresh sandwiches and a coffee bar to improve traffic at other day parts. Bilder & de Clercq offers a selection of fine wines, fresh bread, desserts, kitchen equipment and a variety of organic products such as marmelade and olive oil.

The interior space fits perfectly with the store's innovative character, as opposed to the traditional aisles of a supermarket. Visitors enter the store and are greeted by an inviting counter in which a coffee bar, cash register and kitchen are integrated. The double-dish tables are positioned freely throughout the store so visitors can browse for a dish they like, as if they were wandering through a market. The various shades

of grey combined with warm wooden tones give the store a clean and tailored look. Bilder & de Clercq has a light, industrial feeling while keeping the traditional feel of a quality grocer. Bilder & de Clercq demonstrates how to combine online and offline in a creative way by having an interactive grocery wall in the office of Google in Amsterdam.

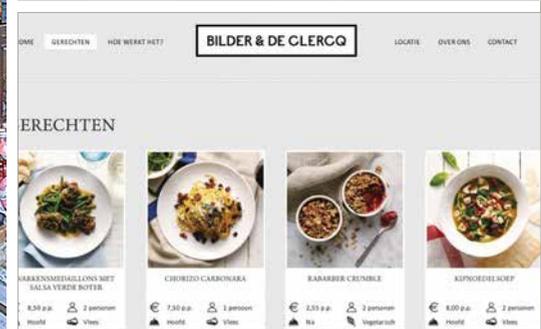
Key data

- **Format:** Food
- **Store Location:** Amsterdam
- **Number of Stores:** 2
- **Number of countries:** 1
(The Netherlands)
- **Size of Store:** 200 sq.m.



Conclusions

Bilder & de Clercq has created a successful formula by reinventing the way consumers shop for ingredients for meals. The first store was opened in February 2013 and a second store followed in December. Both stores are performing even better than the owners expected. It will be interesting to see whether they will expand further and if they will be able to satisfy even more consumers in the future. ○





Retail mix

- Fine wines, fresh bread, desserts, kitchen equipment and a variety of organic products such as marmelade and olive oil.

Points of innovation

- **Bilder & de Clercq redefines the supermarket:** the store is arranged by dish and inspires shoppers instead of letting customers search for inspiration.
- **Eco-friendly:** consumers can buy products in the exact quantity needed so that they do not have to throw away any food.
- **Healthy and hyper local:** all 14 featured dishes are healthy and easy to prepare with the ingredients coming from local sources.
- In addition to the ingredients needed for the 14 dishes, Bilder & de Clercq offers other useful products and shoppers can stay for a drink in the coffee bar.
- Bilder & de Clercq has placed an interactive grocery wall in the office of Google in Amsterdam.

Argos

UK - London

Though not an obvious leader of innovation, catalogue retail giant Argos, a previously outdated fixture on the UK's high street, has proved us all wrong with a new small format, digital fit-out.

Argos has modernized its proposition with an in-store multichannel offering, responding to consumers' increasing propensity to shop online, therefore earning its status as a leader in digital retail in the UK.

Market opportunity

As the high street retracts and traditional catalogue retailing is increasingly relegated to the past, Argos' newly appointed CEO John Walden has made a bold move to win back its former position on the high street. Argos' trial digital concept boasts efficiency and optimization from all angles: it immerses the customer in its new-found status as a 'digital retail leader' from its engaging LED screens featuring moving product promotions, to its digital catalogues and one-click tablet purchases.

The new retail concept responds to customers' increasing propensity to buy online - 44% of Argos shoppers start their journey online, with 90% of purchase conversions occurring in-store. Argos' digital transformation is seamless in its multichannel offer, allowing customers to purchase online or

in-store and collect within 60 seconds of receipt.

New opportunities for supplier relations have also developed through best-in-class video merchandising throughout the store. This presents an opportunity for Argos to generate additional revenue and keep campaigns fresh and relevant for customers.





Innovative Qualities

Argos' new concept store repositions it for a digital future, with a revamp of its catalogue. The concept is simple and offers the same core proposition as before: the shopper browses through categorized product listings, selects the desired product and collects from a holding counter when called. However, the new concept replaces creased paper catalogues with iPads, and products are listed on an online platform in a visual format akin to a smart phone interface with easy navigation, search and stock check functionality.

Argos' points of differentiation are facilitated by technology and a revised

operational approach: staff respond quickly to an automated, vocal order, enabling them to deliver a competitive service proposition. With a 'digital army' of a maximum of 8 staff per store, Argos aims to deliver a 60-second collection service for products purchased either in-store or pre-paid online.

The incorporation of a hub-and-spoke distribution model allows for a wider and more diverse product selection, whereby 120 'hub' stores operate frequent replenishment routes to each of its 6 'spoke' stores. This model allows it to respond quickly and reactively to location-specific product

sales, and to offer an extended, more available product assortment.

Complementing Argos' hybrid retail model, the store layout is streamlined and clearly digital - white brick walls are a neutral background for large LED screens with rolling product campaigns and social marketing messages. The new in-store merchandising approach showcases the power of social media in the retail space, with creative Twitter-like messages such as the weather forecast and friendly staff profiles displayed on LED screens. In addition, the transformation of collection counters into islands allows for a closer staff-customer relationship. ▶

Key data

- **Format:** Digital store
- **Year Opened:** 2013
- **Store Location:** London, UK
- **Number of Stores:** 6 new digital stores within a 737-store estate
- **Number of countries:** 1
- **Size of Store:** 1,200 sq.m.
Annual turnover of £3,297m to March 2013. Hub stores stock an expanded range of 20,000 products through Argos' new distribution model



Conclusions

Argos has proved its continued relevance on the high street and pioneered the use of technology to enhance the customer journey. Having embraced a full digital offer and complementing this with a streamlined, engaging design, the customer experience is still 'no frills', yet efficient, current and seamless in its multichannel conversion to purchase. Argos' digital transformation and planned expansion of 25 digital stores across the UK has led many to wonder how soon this digital hybrid becomes the vision of the UK retail space. ○





Retail mix

- Electronics.
- Housewares.
- Accessories.
- Other miscellaneous everyday products.

Points of innovation

- Seamless multichannel in-store customer journey.
- Hub-and-spoke distribution model for extended product range.
- Voice system operations to ensure quick product dispatch.
- Integration of social media in the retail space.

Au Bout du Champ

FRANCE - Paris

Au Bout du Champ is a click and collect concept dedicated to fresh products and prepared foods. Lockers have been a popular innovation over the past two years in food retail, with many initiatives from retailers like Tesco, Walmart and Auchan, who have focused on the traditional assortment of bulk products, grocery and weekly purchases. Au Bout du Champ seeks to marry both concepts.

The retailer explores a new approach by combining the best of modern digital formats with traditional foods (local, fresh, natural products). The concept debuted in Paris where the success of traditional markets is aligned with consumers preferences for fresh, local products over the more traditional range of product found in hypermarkets and supermarkets. Au Bout du Champ has attempted to address the changing tastes of consumers by mixing local producers with the convenience offered by click and collect. The brand is promoting a more “conscious” way of consumption, in addition to offering lower price points than traditional organic stores.

Market opportunity

The founders of Au Bout du Champ realized that information regarding the source of food is key to consumers, and developing a new concept aimed at changing consumers’ habits to focus on responsible consumption created a big opportunity. Today’s consumers are more informed and better educated when it comes to the origin and the nutritional values of the foods they consume, and quality and organic products are important to the health conscious shoppers.

One of the main caveats to organic and locally sourced products are the steep price points and accessibility. Au Bout du Champ has created a way to provide both extended access and a lower priced offering.





Innovative Qualities

Au Bout Du Champ appeals to both the online and offline consumer. For customers who purchase directly from the store, the device operates similar to that of a vending machine where customers indicate their choice of items and pay by cash or credit card. With a minimum purchase of 15 euros, customers can select the click and collect option and enter the code into the locker received at the end of their online order, which then opens for customers to collect their items. Plastic bags are available on-site; however, customers are encouraged to

bring their own bags to create a more sustainable journey. The store provides flexible opening hours and gives customers the opportunity to order online at any time of day. Up to 100 orders can be filled at the same time, while also receiving daily shipments of fresh fruits and vegetables from six local producers. Lockers are re-stocked every 2-3 hours and neglected products are removed every two days. Customers can access the list of the producers and their descriptions both in-store and online, to encourage

involvement in the process and deliver detailed information on the origin of foods. Au Bout Du Champ differs from traditional organic food chains in their offering; the offer can be quite small depending on the season. This past summer, only 30 products were proposed and available online. The list of the producers and their description is available both in-store and online, so that the customer is more involved in the process and informed about the origin of the products. ▶

Key data

- **Format:** a self-service store for local fruits and vegetables
- **Year Opened:** 2014
- **Store Location:** Levallois-Perret and Paris, France
- **Number of Stores:** 2
- **Number of countries:** 1 country (France)
- **Size of Store:** Approximately 20 sq.m.

Turnover of the first store reached €150,000. 90% of purchases are made in-store; only 10% are made online. The average basket is around 8-10€. The main focus is on frequency of purchase, not volume

Conclusions

Just a few months following launch of the concept, the brand plans to expand with three new stores by 2016. The concept has a strong focus on social and economic issues. On one hand the consumer has access to products of high value, and on the other hand the concept helps producers sell more volume. ○





Retail mix

- Mainly fresh and local fruits and vegetables.
- Eggs and some items produced by farmers (juices, jams, etc.).
- Seasonal products.
- Products are collected daily from small producers located within 100km from the store.

Points of innovation

- **Offer:** Fruits and vegetables from six small producers near Paris.
- **Price:** Self-service allows Au Bout du Champ to reduce its costs to keep prices low.
- **Distribution:** Customers can order online and collect products in-store or go directly to the store to make purchases.
- **Merchandising:** Merchandising is simple with urban lockers.
- **Click & Collect:** Customers can order online for a minimum spend of 15€ and pick up their orders 4 hours later in one of the lockers.

Begendik Cayyolu Store

TURKEY - Ankara

Begendik created the new Cayyolu Store in Turkey's Capitol, Ankara, where competition has increased among local emerging players and international retailers. Begendik has pioneered a completely new format for the Cayyolu Store by utilizing their experience in the retail industry and evaluating best practices. The main drivers of the new store concept are the focus on freshness and customer experience.



Market opportunity

Innovation is a difficult method for differentiation and sustainable developments, especially in growing markets like Turkey. Begendik took this challenge to design and implement a totally new and innovative store format with the Cayyolu Store. Begendik is one of the first modern local retail chains in Turkey. The brand developed the first large format grocery store, the first barcode system in the market, the first chain store with private label products, and the first customer loyalty cards. Begendik has 42 stores and 2,500 employees today.





Innovative Qualities

The Cayyolu Store produces their products right before serving them to customers and are sold right away. The store offerings include, but are not limited to, noodles, pastries, chocolates, fresh yogurt and cheeses. Furthermore, the store's indoor greenhouse grows vegetables and fruits that are cultivated through soilless agriculture and freshly served to customers.

Begendik created a new food retailing approach which dedicates areas of the store to fresh products and quality catering services with a rich cuisine, and a modern soilless agriculture area encouraging healthy alternatives and sustainability. This is a customer-centric and freshness-oriented retailing model. Each aisle of the Begendik Cayyolu Store is supervised by a subject matter expert. The fish department is

supervised by an aquaculture engineer and the produce department is supervised by an agricultural engineer. and fruit and vegetables section under supervision of an agricultural engineer. The store covers about 4,000 sq.m. of retail space. Special attention has been paid to the restaurant and children's area of the Begendik Cayyolu Store. A specially designed café includes a kitchen space where parents can prepare food for their children while they are supervised by expert educators on a playground with mini benches and tables and chairs.

Another feature of the Begendik Cayyolu Store is the wide variety of plants throughout the store. A total of 10,000 plants and trees of 300 different varieties including lemon, orange, mandarin, bougainvillea, bergamot

and olive trees are in place to offer an expanded experience for the customers.

As another first time practice, Begendik launched its express cashier system. This system prevents long queues and waiting lanes by guiding the customers to unoccupied lanes and enabling express purchasing, thus allowing customers a faster check out process.

The aisles in Begendik stores are arranged so that the customers walk at ease even during peak hours. The height of aisles is designed to provide easy access. Other technologically advanced parts of the store include the air conditioning system which is automatically adjusted according to the number of customers in the store.



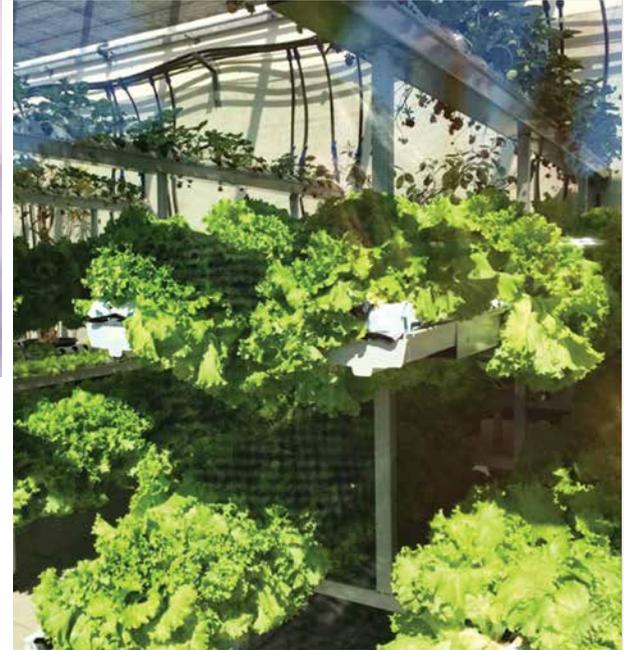
Key data

- **Format:** Supermarket with food service and café
 - **Year Opened:** 2013
 - **Store Location:** Ankara, Turkey
 - **Number of Stores:** 42
 - **Number of countries:** Turkey
 - **Size of Store:** 4,000 sq.m.
- Number of customers increased 40% after the new format. Loyalty members increased 70%.

Conclusions

With their innovative DNA, Begendik designed and implemented the Cayyolu Store. The new store in Cayyolu was developed after traveling around 500 thousand kilometers in the last 3 years to examine successful examples in the global retailing sector. Begendik combined the experience with research to develop the model not only to satisfy the requests, needs and tastes of Turkish consumers, but also to serve as a best practice for the global retailing market.

The Begendik Cayyolu Store was nominated at the World Retail Awards, and was also selected as a finalist in the category of Store Design of the Year at the World Retail Awards. ○





Retail mix

- Grocery and fresh foods.
- Dairy products.
- Meat and processed meat.
- Bakery.
- Food service.
- Cafe.
- Other supermarket categories.

Points of innovation

- A new format combining elements from supermarkets, food service and cafés.
- A focus on freshness with items prepared immediately before being served to customers.
- Expert service.
- Optimized aisles, layout and check-out.
- A dedication to nature, with 10,000 plants and trees in store.

Bikini Berlin

GERMANY - Berlin

After extensive renovations, the revitalized building complex BIKINI BERLIN reopened its doors early in 2014. Within an area of 90,000 sq.m., an independent neighborhood emerged including a hotel, restaurants, offices, stores, an art center and a parking garage.

The centerpiece of the neighborhood is the BIKINI BERLIN Concept Mall. The mall covers an area of 17,000 sq.m. and offers carefully curated boutiques, concept and flagship stores, diverse restaurants and service providers. The mall mainly consists of small, carefully selected retailers with only a few branded retail chains. BIKINI BERLIN targets a modern, trend-oriented group of customers who appreciate quality and individuality.

The concept mall strives to redefine the future of commerce. Core elements of this new format are the BIKINI BERLIN BOXES, 19 pop-up stores which can temporarily be used by different retailers, as well as the retail lab SUPERNOVA, an experimental area for new retail concepts.



Market opportunity

In Germany, almost all major cities have at least one shopping mall. However, in the German capital of Berlin, more than 60 shopping malls have been opened. Within this almost saturated market there is intensified competition. Moreover, outdated shopping malls and retail mix result in empty stores and declining frequency of customer visits. In addition, the rapid growth of e-commerce severely worsens the situation.

Many shopping malls have responded to this by focusing on the revitalization, restructuring and modernization of obsolete formats. New shopping malls are opened hesitantly. There is a trend

towards opening in prime locations within city centers as well as smaller retail areas of up to 20,000 sq.m.

The latest developments show that shopping malls can no longer contain just traditional stores. They have to offer the customer an innovative and extraordinary shopping experience and generate added value for the visitors. Malls develop into social meeting points. Shopping is an extension of work, food, art, culture and leisure time and is offered as a complete package to customers.

BIKINI BERLIN recognized this change and presents retailers and customers with a “shopping mall of the future”.



Innovative Qualities

BIKINI BERLIN promises a “shopping experience for the future, urban society”. Carefully selected, high-quality brands as well as a unique mall design give BIKINI BERLIN a competitive advantage over conventional shopping malls. Due to the unusual layout, customers have direct access to ground level stores from the street.

Two innovative highlights of the mall are the modular BIKINI BERLIN BOXES and the SUPERNOVA store concept. The ground level houses nineteen wooden pop-up stores. The modular boxes cover an area of 19 to 39 square meters. The boxes can be adjusted to the store operators and rented for a period of three to twelve months. Retailers can use these areas to establish a new brand, to evaluate new products and target groups and to improve customer

perception as well as customer loyalty. In this way, BIKINI BERLIN gives retailers an opportunity to test new retailing concepts without entering long-term, contractual obligations.

Aside from the BIKINI BERLIN BOXES, the mall offers an area for new retail concepts called SUPERNOVA – a future retail lab. The goal is to redefine the role of retail in the digital era. SUPERNOVA provides real and emotional shopping experiences as a counterpart to the emergence of online shopping. Therefore, every season new retailers are brought together to turn their vision of retail into reality by offering special editions, product presentations and changing store displays to customers. The retail lab started with the theme “soccer” in reference to the World Soccer Championship.

Another highlight is a 7,000 sq.m. green roof top terrace. At the roof garden, customers can relax after a long day of shopping and enjoy the view over Berlin and the Berlin Zoological Garden. ▶

Key data

- **Format:** Concept Mall
- **Year Opened:** 2014
- **Store Location:** Berlin, Germany
- **Number of Stores:** 1
- **Number of Countries:** 1; Germany
- **Size of store:** 17,000 sq.m.
- **Product Mix:** Fashion, beauty, design, home, food, services



Conclusions

BIKINI BERLIN presents a new vision for future shopping malls and tries not only to meet customers' expectations but to exceed them. To achieve this goal BIKINI BERLIN seeks to attract customers by providing a unique combination of stores which invite customers to linger in the mall. This is also made possible by the BIKINI BERLIN BOXES as well as the SUPERNOVA retail lab. ○



Retail mix

- Combination of a work, recreation, entertainment place and an unique shopping experience.
- Curated Shopping Mall – combination of carefully selected and curated brands.

Points of innovation

- Unique mall layout – all stores are directly accessible and visible from the street.
- BIKINI BERLIN BOXES – experimenting with new temporary retail concepts.
- SUPERNOVA – area for future-oriented retailing experiments.

Dr. Fleming

ITALY - Milan

By creating the pharmacy of the future, Dr. Fleming has redesigned the conventional approach to a pharmacy, putting the customer attention at the core of their offering, and with an unique service model.

Dr. Fleming was the winner of the Confcommercio Innovation Award, Service Design Category, and nominated for the World Retail Federation's Best New Retail Launch award.



Market opportunity

The health and wellness market continues to gain attention worldwide, as consumers have become more health-conscious and focused. Italy has a growing market opportunity for the health and wellness sector due to the aging population that is focused on staying active and fit. Dr. Fleming's concept creates new solutions for Italy's inefficient and bureaucratic health-care system; recent laws have made it possible for pharmacies in Italy to offer services and specialized tests. Dr. Fleming has launched the

new pharmacy service concept, which will develop further to include para-pharmacies and service corners.

The goal of the concept is to quickly attract a vast range of clients who are looking for easy, quick, professional and affordable health care. The concept's approach to clients is different from traditional pharmacies: customers find a pleasing and welcoming environment, where they can comfortably wait for test results, be greeted by friendly staff, and enjoy a hassle-free service.

Innovative Qualities

Dr. Fleming places the person at the center of its services, in a space that combines both product and service areas. Services are divided into three areas: health check-ups (such as blood, diabetes, liver function tests, etc.); prevention check-ups (for prevention of cancer, strokes, asthma, etc.) and aesthetic check-ups (face, sun damage, hands, hair, cellulites, aging). There is also an assistance center with psychologists, nutritionists and physiotherapists. Thanks to cutting-edge technologies, the average cost for patients is lower than that of the public health-care system. The pharmacy also offers a selected assortment of SOP and OTC drugs, with both brand name and generic options. The retail design of the store creates a unique image: the sales area is characterized by circular, harmonic, relaxing lines and with a light-based chromotherapy effect on the walls. To facilitate the pharmacist-



customer interaction, there are no traditional counters. The pharmacist relies on an advanced storage and inventory system, with a completely automatic warehouse, an efficient replenishment system and low storage costs.

In the sales area, there is no need for the pharmacist to leave the client as he only has to scan the barcode and the product is delivered in few seconds. ▶

Key data

- **Format:** Service pharmacy
- **Opening:** 2013
- **Store Location:** Milan (Italy)
- **Number of Stores:** 1
- **Size of store:** 80 sq.m.

Conclusions

The company has set very ambitious goals, including development of both national and international franchising networks with over 300 sales points in the next 5 years. The plan calls for various offerings, like the first one opened in Milan, to parapharmacies and corners in existing pharmacies or in other retail formats. ○





Retail mix

- Pharmacy and parapharmacy products.
- Homeopathic and herbal products.
- Analysis and self-analysis services.
- Beauty and aesthetic programs.

Points of innovation

- Specialized services.
- Empathic and relaxing retail design.
- Automated inventory and storage.

Hedonism

UK - London

Hedonism: the doctrine originating from Greek philosophy where it was believed that moral value can be defined in terms of pleasure. Few may know that it is also the name of a glitzy two-floor store in Mayfair, stocking the finest and rarest of wines and spirits.

Hedonism is a luxury fine wine and spirits retailer, holding the UK's largest in-store collection of wine. Having poached the aptly named Alistair Viner, Harrods' wine and spirits buyer of 16 years, the buying team at Hedonism has built up an inimitable and eclectic collection of around 5,500 wines and 2,000 spirits, bringing together under one roof the finest crops from each region of the world from over 300 suppliers globally. The impressive store covers two floors totaling 650 sq.m., which includes space for wine tasting and group classes, and a children's play area for families who want to spend time browsing.

Market opportunity

Hedonism was founded by Russian mobile phone tycoon Evgeny Chichvarkin in the summer of 2012. The business was inspired out of the frustration borne from the slow service he encountered from wine merchants, often having to wait six weeks for delivery. Hedonism is thus set apart from other similar wine and spirit propositions due to its vast range of stock housed within the store, aiming to give customers immediate access to a full selection – including every vintage – of an incredibly wide range of wine and spirit labels.

Despite its grand location and creatively merchandised displays of some of the world's most exclusive wines, the children's play area and tasting machines make it an accessible destination for all types of wine lovers. Furthermore, the service is sophisticated but not stuffy, catering

both to the tycoon spending thousands and the student spending £10: according to CEO Tatiana Fokina, there are, in the collection, over 600 bottles priced under £30. This accessible sales principle spreads the love of fine wine while sustainably developing the buyers of the future: for around £20 you can taste a Château Latour from 1999.





Innovative Qualities

Moving into the store itself – Hedonism has done for wine what the Regent Street Nespresso shop has done for coffee. From a relatively uniform product, a world of creative possibility has been embraced. Walking in, you are confronted with a monumental chandelier comprised of 125 hand blown Reidel glasses. Down the stairs, the seventeen-degree cellar equipped with a tasting space is equally impressive; huge, wooden, trunk-like seats with blankets give it a chalet-like warmth while 18 liter bottles line the room like magisterial cannons. It is little wonder that Chinese tourists have come in clutching copies of the FT's 'How to spend it' feature to have their photo taken on site.

The basement tasting area and children's play area transforms the store from just a shop that stocks product, to

an experiential, educational adventure for customers who have an hour or two to spare to enjoy sips of wine next to a gleaming, amber wall of Château d'Yquem. Eight Enomatic machines display 48 wines available for tasting, changed on a weekly basis, for those who want to 'try before you buy' or just soak in the oak-filled atmosphere in between glasses of wine and tidbits of knowledge from the sommeliers on hand.

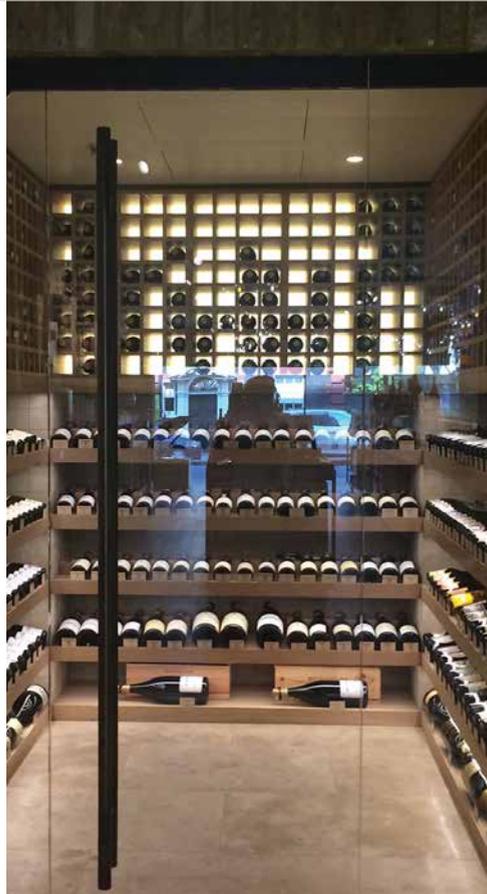
Key data

- **Format:** Concept store
- **Year Opened:** 2012
- **Store Location:** London, UK
- **Number of Stores:** 1
- **Number of countries:** 1, UK
- **Size of Store:** 650 sq.m.
- **Turnover and additional data point:** No turnover data; stocks 5,500 wines and 2,000 spirits in one shop



Conclusions

Hedonism is a prime example of a destination store. They have several selling points that are not only unique locally but internationally as well. Customers come from all over the world to find specific wines, to speak to specific aficionados, or witness a wine retailing experience like no other. Although no plans have been confirmed as yet, Shanghai, Moscow and Mumbai have been suggested as offering the right environments for the expansion of the business. Hedonism has thought outside the box, and is bringing wine retailing to new heights. ○





Retail mix

- 5,500 wines and 2,000 spirits (e.g. brandy, liqueurs, sake, whisky, vodka, etc.)
- 600 products for under £30
- Accessories such as glassware, wine-related books, olive oils, syrups, mixers, decanting and cleaning utensils, etc.
- Eight Enomatic machines for bespoke tasting experiences or ‘try before you buy’

Points of innovation

- The product: unique and expansive collection
- The service: handpicked selection of 11 multilingual sommeliers
- The store: experiential and engaging design elements
- The extras: deliveries within one hour in central London, and wine specialists available for hire if needed

OVS 2.0

ITALY - Milan

Innovation and a partnership with Google: the OVS flagship blends new technology into a traditional store, located in a historical palace in the center of Milan, turning it into a place where shoppers can enjoy an intense digital shopping experience.



Market opportunity

The use of smartphones is rapidly changing the retail landscape and blurring the line between online and traditional shopping experiences. In Italy, 46% of clients use their smartphones to gather information on products and 25% compare prices with online pricing from within the store. Social networks are increasingly becoming the 'thermometer' of hot new trends. As a consequence, when creating their assortments, retailers are taking into account what customers have tweeted

on Twitter or pinned on Pinterest. With their new flagship store in Milan, OVS intends to relate to its clients in a more sophisticated fashion, expanding its relationship with them through an innovative digital shopping experience based on virtual changing rooms, sales assistants with iPads, and click and collect services. In addition to this, the store offers an area with Google technologies and products thanks to a partnership with Google Enterprise.

Innovative Qualities

The interior design of the flagship, located in a very old palace in the historic center of Milan, highlights the uniqueness of the building, using glass walls and natural lighting and effectively combining new elements with pre-existing traditional aspects. Lead beams are used to highlight products and light colors are used for the floors assigned to women's apparel (ground floor and first floor). In the men's section, located in the basement, old rolling shutters are utilized as backgrounds for the rails to create walls for clothing based on street and casual styles.

The assortment, which includes women's wear, men's wear, and accessories, offers limited edition collections branded as OVS Via Dante, with a selection of 60 items available in

store and online.

Thanks to its partnership with Google Enterprise, OVS uses cutting edge technology to offer its customers a multi-sensory experience both in store and online. This technology also streamlines the organization of the store.

A specially designed App allows shoppers to obtain information on products (available sizes, online purchases or the nearest OVS store where they can find an out of stock size or color). The "Magic Fitting Room" is an interactive space where clients can play with their image, thanks to a monitor that acts like a mirror with a double view (front and back). Using the App, customers can take pictures, visualize them on their phones and of



course share them on social networks. They can also ask sales assistants for a new size directly from the changing room. An Interactive Kiosk acts as a multimedia station that invites customers to purchase online and check availability in

nearby stores. Finally, a Click & Collect service makes it possible to purchase products online and pick them up in any OVS store. ▶



Key data

- **Format:** Flagship store
- **Opening:** 2014
- **Size of store:** 900 sq.m. across three floors
- **Number of stores:** 580 in Italy and 110 abroad



Conclusions

OVS is one of the most important clothing retailers in Italy for men, women and children. Brand awareness is equal to 97%, due to its history and widespread presence throughout the country. The opening of the flagship store, Via Dante, in Milan represents an important evolution of the format in which the customer participates in a strong digital shopping experience. ○





Retail mix

- Apparel and accessories for men and women.

Points of innovation

- Cross-channel store.
- Partnership with Google Enterprise.
- Multi-sensory.
- Assortment of all stores available online.

Selfridges Fragrance Lab

UK - London

Can one's character be distilled into a scent? Selfridges' Fragrance Lab is an immersive fragrance experience showcasing retail at its most indulgent and hedonistic best.

From May 1st to June 27th 2014, customers of the prestigious Selfridges flagship department store in London paid £65 to go on 'a journey to explore the outer reaches of scent, to discover the essence of one's self' – as described by its creators. Participants began by completing a personality test conducted on an iPad to determine their tastes and habits, and were then given headphones and an audio guide to begin their journey through a series of 'sensorial chambers'. Finally, based on their personality evaluation, participants were presented with a fragrance prescription from one of dozens of scents by perfumers Givaudan.



Market opportunity

Designed by campaign and trend forecasters The Future Laboratory, the Fragrance Lab installation is an impressive piece of retail design that defines the future of the retail experience, where retail is made to be fun, but in a focused and relevant way. Both companies have collaborated on several previous sensorial projects that combine scent, visuals and sound, such as Sweet Shoppe for the London Design Festival (presented as a curated personal journey to source the perfect sweet), and a traveling bar, Mojito Embassy, for Havana Club.

The seemingly simple experience was four years in the making, involving new methods of choice architecture and customer segmentation. It not only

creates added media attention and increases traffic to the Selfridges store, but it is also a painless, easy way to collect consumer data on customers who might otherwise be reluctant to stop and answer survey questions.

For the shopper that dislikes the traditional way of perfume shopping where one is bombarded with questions about favorite scents and given tester sticks to smell, the Fragrance Lab is instead a refreshing, fun and surprising way to shop for perfume. Being an active participant within an immersive environment adds theatre and mystery to the whole process. The installation's bespoke nature is ideal for luxury brands and should be the type of forward thinking that they should emulate.



Innovative Qualities

Customers 'check-in' at a futuristic-looking reception, and are given two experiences to choose from: express (five minutes) or immersive (15 minutes). They are also given a deceptively simple questionnaire designed by The Future Laboratory to determine scent preferences, where participants are also asked to select images from a series of triptychs to determine personality traits, such as whether they are shy or outgoing, or whether they are trendsetters or followers.

Those that choose the immersive experience are equipped with an iPad with a pre-recorded audio track and headphones, and guided into a series of laboratory-like rooms where they are invited to touch, sniff and interact with products. Each room presents a different set of objects and a new olfactory experience exploring different connections between scent and memory. Tubes of coffee beans are placed between each room to neutralize the nasal palate.

The final room is the corner window in Selfridges (with the public hurrying past), where a man in a white coat asks follow-up questions to pull together the final personal preferences, and then provides a horoscope style summary and a numbered scent based on the personality test and choices made during the experience, which might be traditional, romantic, contemporary or modern.

Key data

- **Format:** Department store
- **Year Opened:** 2014
- **Store Location:** London, UK
- **Number of Stores:** 4
- **Number of countries:** 1, UK
- **Size of Store:** 50,000 sq.m. (to be 54,000 sq.m. in 5 years)
- **Turnover and additional interesting data point:** £487.5 million (ex. VAT) turnover and 60.9% gross margin in 2013



Conclusions

The two-month in-store campaign caught the attention of the press and garnered significant attraction to the Selfridges store itself, while successfully capturing insightful data on the habits and behaviors of perfume shoppers at the same time. The project adds to the store's growing influx of new and different campaigns and pop-ups, truly keeping Selfridges firmly placed at the forefront of innovative and experiential department store retailing in the UK. ○



Retail mix

- Bespoke bottle of 50ml fragrance created by Givaudan perfumers.
- Interactive, olfactory experience with audio guide.

Points of innovation

- The purpose-built lab combines sight, hearing, smell and touch into one experience.
- The experience takes the customer on a tour through areas including the renowned windows of Selfridges – a first in the store’s 105-year history – simultaneously creating interest from high street passers-by.
- An interactive and enjoyable method of consumer profiling.
- Customers not only take away a product, but also gain insight to their perfume character profile.

Space Ninety 8

USA - New York

An Urban Outfitters concept store and indie-minded market located in a Brooklyn warehouse offering a unique multi-level assortment of local designers and artisans, floral designs and a place to shop, dine and relax. This concept is the second of its kind for the UO brand and sparks the potential for expansion of alternative concept development.



Market opportunity

Urban Outfitters Space Ninety 8 concept takes inspiration from their Los Angeles retail experience store, Space 15 Twenty. Space Ninety 8 differentiates from the standard Urban offerings; they have added a restaurant, pop-up space and a home for local artists, building upon their traditional assortment of womenswear, menswear, home and tech. Space Ninety 8 pushes the retailer expertise of the company to the extreme by offering not only a creative space for Brooklyn natives, but also a new collection from UO—Urban Renewal Vintage Collection.

UO has developed this concept into much more than a retail space and creates an entirely new experience

for the brand. The Market Space is an opportunity and platform for local artists to reach a larger audience, while also discovering new brands not available elsewhere—many of the products found in the store will be limited edition or one-of-a-kind.

The brand has already announced partnerships with natural skincare line S.W. Basics, pottery designer Group, jewelry designer and metalsmith Lila Rice, the furniture line Hym Salvage and New York based surfboard shapers Salt Surf to name a few. These partnerships have been announced through the Instagram site and predict the growth and popularity of the store.



Innovative Qualities

Space Ninety 8 is comprised of five layers; creating a strong mix of retail, foodservice and design all in one space. Following the Urban Outfitters reputation for “hipster-esque” on-trend merchandise, the Space store attracts many customers, with a special focus on the urban dweller.

Space Ninety 8’s unique multi-level format brings a plethora of options to the traditional shopper.

- Basement: A reserved space for a rotating line of pop-ups to reside,

starting with Adidas Blue and custom artwork by local artisans.

- Ground Floor: A showcase for local artists and designers, in addition to the branded Urban Renewal vintage shop.
- Floor Two: Urban Outfitters women’s.
- Floor Three: Urban Outfitters mens’; mezzanine level bar and the new LA original gastropub, the Gorbals.
- Rooftop: Outdoor dining space.

Key data

- **Format:** Multi-level new concept by Urban Outfitters
- **Year Opened:** 2014
- **Store Location:** Brooklyn, New York (US)
- **Number of Stores:** 2 (modeled after Space 15 Twenty in LA)
- **Number of countries:** 1 – (US)
- **Size of Store:** 5,295 sq.m.
- Turnover and additional interesting data of interest (pls indicate year of data): \$3.1 B (all Urban Outfitters) - 2014



Conclusions

With a very recent opening of the Brooklyn location, information has not yet been released on foot traffic and revenues; however, being that this is the second store concept for UO, we presume the brand will continue development of this format. Urban Outfitters is planning to construct and open 35-40 new stores in 2015 focusing on expansion of the brand. ○



Retail mix

- Market space for shop-in-shops and single-brand pop-ups including merchandise and artwork from local designer exclusives.
- Apparel for both men and women representative of both Urban Outfitters traditional apparel and new introductory brands.
- Music area provides an eclectic mix of records, record players, books and more.
- Bar, restaurant and rooftop for dining, casual brunches and relaxation.

Points of innovation

- Blends retail, community and foodservice under one roof.
- Collaboration with community and local events to bring people in-store, while also involving them with activities outside.
- Helps local designers show off unique collections under a well-known brand banner.



RETAIL TRENDS
CURATED COLLECTIONS

Bento Store

BRAZIL - São Paulo

A contemporary and inspiring design retail store focused on urban mobility, offering a variety of lunchboxes, lunch bags and bottles. The store reinvents the traditional lunchbox by driving sophistication, life-style, fashion, technology and functionality, while also creating solutions.

Key data

- **Format:** Retail stores and e-commerce
- **Year opened:** December, 2013
- **Store location:** São Paulo, Rio de Janeiro and Recife cities
- **Number of stores:** 4
- **Number of countries:** 1 (Brazil)
- **Size of store:** Avg. 38 sq.m.
- **Product mix:** Lunchboxes, lunch bags, bottles and accessories

Market opportunity

The new health movement in Brazil has residents focused on creating better food habits, by improving the way they eat, escaping the daily time pressure and bringing more of their own food to work, school, and on-the-go.

Recent developments have created a large business opportunity encouraging the quality of health and wellness. The Bento Store, inspired by the Japanese tradition Bentôs, has curated 24 brands from 12 different countries for their product offering that present functional and eye-catching design.

Innovative Qualities

Boxes inside boxes! The unique bento boxes are made out of handmade wood and are compartmentalized to serve various food groups, as well as foods of different shapes and sizes.

Bento Store makes packing lunch an enjoyable activity, by creating a shop for the easy to use and friendly lunchboxes. The store sells practical, fun and user friendly products that charm customers through their design. The Bento Store created this concept to serve as a flagship display format for the products. With a basic store design structure



and minimal color, the creative lunch boxes stand out and capture customers attention.

Conclusions

Major shopping center groups in Brazil have invited the Bento Store concept to deliver innovation inside the malls. As a result, the concept has gone from one to four stores. With the rapid

expansion, the brand also opened a pop-up store in just 7 months and is continually planning future openings for up to 10 stores until the end of 2015.

The flagship store has experienced successful growth, with sales of 18% higher than planned, while e-commerce is also showing strong results. ○

blow LTD.

UK - London

We've all heard of fast fashion, but fast beauty too? London's newest in-and-out beauty salon, blow LTD. offers affordable blow outs, manicures, makeup and champagne within 30 minutes, just in time for those 9am meetings or for a glitzy night out.

Key data

- **Format:** Salon
- **Year Opened:** 2013
- **Store Location:** London, UK, www.blowltd.com
- **Number of Stores:** 1
- **Number of countries:** 1, UK
- **Size of Store:** 139 sq.m.
- **Product Mix:** Cosmetics, skincare and haircare



Market opportunity

Backed by Mark Sebba, the CEO of Net-A-Porter and Nick Robertson, the founder of ASOS, and co-founded by ex-Grazia and ELLE editor Fiona McIntosh and digital guru Dharmash Mistry, blow LTD.'s proposition is to 'look and feel great in 30 minutes or less'. blow LTD. aims to disrupt the currently fragmented UK salon market (55,000 salons of which 94% are single owner) by expanding nationwide.

The Covent Garden salon is the first to bring the New York-style speed of service to London, catering to the time-starved woman by offering quick walk-in, walk-out beauty services all at the same time, at affordable prices and at convenient times: the salon opens at 7am every morning and does not close until 9pm from Thursday to Saturdays.

Innovative Qualities

The salon's essence revolves around the customer experience: apart from nailing the fast and cheap (£25 for a blow out, £15 for makeup or a manicure, or £50 for the lot), it brings a down-to-earth, relatable mantra to the customer with its promise of its Ten Commandments based on common niggles, including 'We will never ask you about your last holiday (we know you have way better things to do with your time)' and 'We will never talk you into a crazy hairstyle just because it's like, big in Hoxton'. In store, guests are equipped with iPads to browse through digital look books and magazines, and, staying on-trend with modern technology, the salon has an interactive website featuring updated blogs, video tutorials via blow TV, an online booking system, and an online

shop selling their favorite multi-tasking, fast beauty products including brands such as Essie, Kératase, and Laura Mercier.

Conclusions

blow LTD. is quickly becoming London's top beauty destination with its open plan 'Fantasy Beauty Bar' concept tapping into the needs of the modern, on-the-go city girl. Combining quality, convenience, modernity, price and location all into one, it is quite hard to see how this salon could go wrong. ○

Butch

GERMANY - Düsseldorf

Butch - for heroes in the kitchen - is a kitchenware and cooking store geared toward men. The format combines quality, function and design with an emotional and multi-sensory shopping experience.

Key data

- **Format:** Kitchenware and cooking store
- **Year Opened:** 2011
- **Store Location:** Düsseldorf, Germany
- **Number of Stores:** 1
- **Number of Countries:** Germany
- **Size of store:** 200 sq.m.
- **Product Mix:** Kitchenware and cooking ingredients

Market opportunity

It's been quite some time since cooking was foremost a woman's task. More and more men are discovering a passion for cooking. Around 36% of German men claim that they cook at least five times a week. Yet, retailers have not consistently targeted this audience. Butch is a kitchenware and cooking store which appeals to men who enjoy cooking. The store succeeds in addressing every detail from store design to communication. The authentic and edgy retail store offers cooking utensils geared towards professionals as well as amateur cooks.

Innovative Qualities

Grey walls, black ceilings and a lot of steel create a unique industrial design. Pallets and work benches are used for product presentation. Slogans such as, "My kitchen is bigger than yours" amplifies the message aimed at men. Butch strives to be live, discoverable and touchable. Customers can test the products in the center of the store, the cooking area, with a glass of wine and advice from the staff. Regional dishes are freshly prepared every day at noon.



Additional cooking and food tasting events such as the "plateau de fruits de mer - night" convey the pleasure and enjoyableness of cooking to the customers.

At the core of the assortment is Butch's own private label which offers high quality at a good price.

Conclusions

To the founders of Butch, cooking is "the most beautiful triviality in the world". The retailer succeeds in conveying this feeling to customers. Butch is both a kitchen and a cooking amusement park which offers customers inspiration and enjoyment. Although fast-food and convenience concepts are on the rise, Butch refocuses the customer's attention on the pleasure of cooking as well as high-quality food. A positive customer rating proves that Butch is on the right track with its emotional and multi-sensory concept. ○



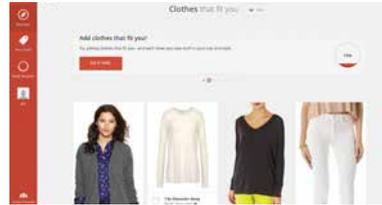
Fitbay

DENMARK

Fitbay created an online platform that personalizes collections based on your shape and size. Fitbay has delivered an international e-commerce and social networking platform for every body type.

Key data

- **Format:** E-commerce community
- **Year Opened:** 2014
- **Store Location:** www.fitbay.com
- **Number of Stores:** 1
- **Product Mix:** Apparel

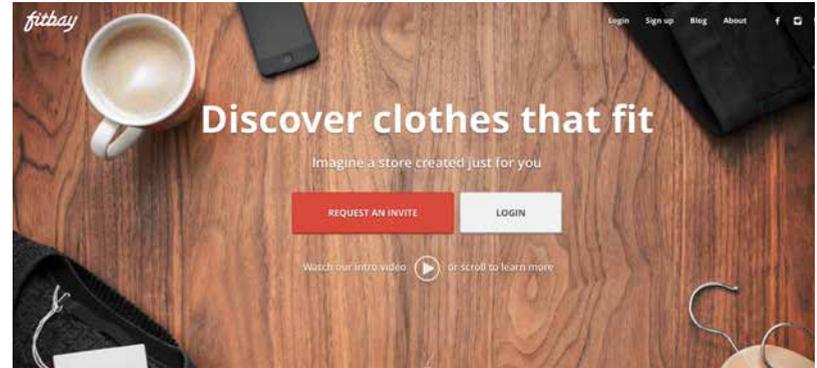


Market opportunity

Fitbay has created a solution to the problem of browsing through millions of products that aren't the right size and returning products that turned out to be either the wrong shape or fit. In today's world, many consumers experience issues shopping online as clothing manufacturers usually design clothes for the "average" body type and do not have standardized sizing or reviews.

Innovative Qualities

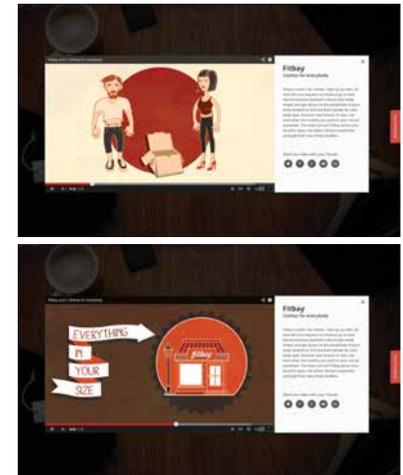
Fitbay is an online community where clothing is specified to the shopper's measurements, minimizing the issue of purchasing the wrong size. The platform connects people of similar size and shape, by creating a community of fashion inspiration for their body and style. Body doubles can follow each other and share advice on clothes that fit and access one of another's virtual wardrobes. Fitbay has created a simple



registration process, requiring no more than five answers to anonymous questions about one's body shape, and no measurement is required. The more one tells Fitbay about their favorite brands and sizes, the more personalized the experience gets. Fitbay's consumer-facing service is also appealing to online retailers. Currently, the company is making money on affiliate fees, where e-commerce sites pay Fitbay for any sales it drives; the database currently consists of 2 million items.

Conclusions

With much success from a 3 month period with over 500% growth, Fitbay closed a 2 million (USD) seed round, lead by New York-based Steadfast Venture Capital and Stockholm-based



Creandum, in June 2014. According to the co-founder and CEO of Fitbay, the investment will allow the company to grow the product team in both Copenhagen and New York markets, in order to build new innovative features even faster. ○

MODOMOTO

GERMANY - Berlin

“Well-dressed without the pain of going shopping” – this is the slogan of MODOMOTO, the curated shopping service exclusively for men.

Key data

- **Format:** Curated Shopping Service
- **Year Opened:** 2011
- **Store Location:** Berlin, Germany
- **Number of Stores:** 1
MODOMOTO Fitting Room in Berlin
- **Number of Countries:** Germany & Austria
- **Product Mix:** Fashion



Market opportunity

Multiple studies have proven behavioral differences between men and women, especially with regards to their shopping behavior.

Besides behavioral differences, men and women exhibit different patterns in problem solving and decision making. If retailers recognize the varying ways in which men and women shop, they can significantly increase their sales.

MODOMOTO is a personalized online shopping service for men which fulfils the needs of its hard-working and fashion-conscious clientele in an extraordinary way.

Innovative Qualities

Shopping with MODOMOTO is simple

and efficient. Customers register on the website and indicate their sizes and preferences by completing a questionnaire. The information is analyzed and stored by MODOMOTO's style experts. Customers can order online, by telephone or via an app. Stylists always assemble two different outfits according to the client's preferences of style, price, and occasion. Each outfit consists of eight to fifteen pieces.

The customized MODOMOTO boxes are delivered to the recipient's home or workplace. Customers can decide in the comfort of their homes or offices which pieces of clothing they want to keep or return. Aside from high-quality products from traditional brands, the assortment

also contains lesser known brands. In this way, the stylists can create the perfect outfit for each man.

Apart from having an online presence, MODOMOTO has also opened a physical fitting room in Berlin. Here MODOMOTO goes one step further: Customers can try on their outfits with a glass of wine or coffee and obtain advice from stylists.

Conclusions

MODOMOTO fulfils the needs of fashionable men who want to be well dressed without the hassle of going shopping. The concept, which was founded in a backyard in Berlin, serves more than 150,000 customers. ○

Outfittery GmbH

GERMANY/SWITZERLAND

Outfittery curates clothes and accessories based on the personalized profile of the customer. The Outfittery box, which is only available for men, will be sent home free of charge after an online consultation with one of the Style-Experts.

Key data

- **Format:** Online personalized fashion service
- **Year Opened:** 2013
- **Number of Stores:** Online only
- **Number of countries:** 4
- **Product Mix:** Clothes and accessories

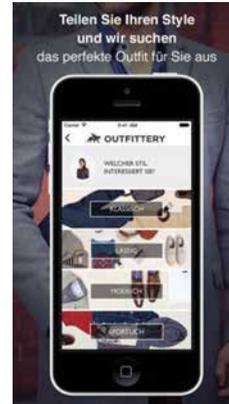
Market opportunity

Through a three-step process, the customer gets suggestions about clothes from a “Style-Expert” and this without losing time at the shop. By filling out a questionnaire and with the support of a “Style-Consultation”, the customer gets the clothes and accessories sent home. The delivery, as well as the return of the unwanted clothes, are free of charge. The popularity of Outfittery is also shown by the high number of Facebook likes.

The company was founded in Germany and has since expanded to Austria, Netherlands and Switzerland.

Innovative Qualities

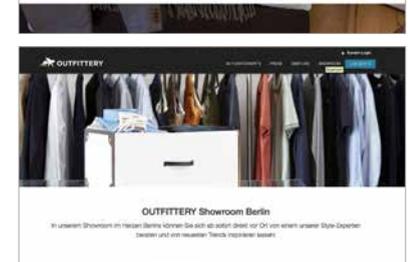
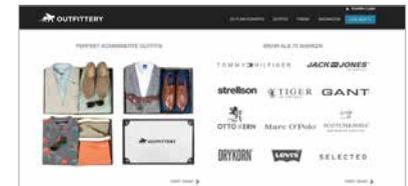
Outfittery is clearly positioned in the men’s fashion sector. They work like a normal retail store by buying high quantities of clothes and sell them as single parts. The difference is that the contact with the client is only over the internet. The assortment is highly qualitative with a stylistic diversity. Outfittery is targeting those men who



want to be well dressed but do not like to spend hours in fashion stores until they find what they want. They are willing to rely on the advice of their outfittery style experts. Outfittery has no brick-and-mortar stores but the Style-Experts can be contacted by phone, email or Facebook. If the clothes received by the customers should not fit or if they do not meet their expectations, the customer can send them back free of charge.

Conclusions

This business model with online shopping and online consultancy is a different way to sell fashion products. Can buy their clothes very conveniently from home and even outside the office hours. ○



The Pop Shoppe

SOUTH AFRICA - Port Elizabeth

Capitalizing on the global “Pop Up Store” trend, The Pop Shoppe is a retail heaven for aspiring retailpreneurs and retail concepts wanting to test the market. The Pop Shoppe delivers a place to experiment, without the high risk of failure and overheads often associated with the retail market in South Africa.

Key data

- **Format:** Retail Store
- **Year Opened:** 2013
- **Store Location:** Port Elizabeth, South Africa
- **Number of Stores:** 2
- **Number of countries:** 1, South Africa
- **Size of Store:** 300 sq.m.
- **Product Mix:** Women’s Fashion and accessories, Kids’ clothing and accessories, shoes, health and beauty and coffee shop concept.

Market opportunity

The Pop Shoppe provides the staff, point of sale, marketing and daily reporting tools to give retailpreneurs and exhibitors a store without the stress of actually running a store. The stores and concepts within The Pop Shoppe are supported by a website which provides stock information from the shop floor for online purchasing and lists each of the retailer’s pages. Supported by a coffee shop, a nursery and a beauty offering, The Pop Shoppe is a one stop-shop for customers looking for fresh new concepts and a unique shopping experience.

Innovative Qualities

Located in a prime business and retail hub area of Port Elizabeth in Walmer Park, The Pop Shoppe attracts an assortment of retailpreneurs and concepts ranging from fashion designers, new fashion lines, hand-made fashion accessories and private label organic baby foods. The store design of the Shoppe was developed around the idea of providing a range of spaces and fit outs to provide tenants



with different space and rental options for their concepts. Unlike weekend markets or one off trade fairs, The Pop Shoppe is the first of its kind in South Africa to provide a platform which not only helps to nurture new retail concepts but also develops sustainable retail concepts that can be incorporated into mainstream retail in formal retail developments across the country.

Conclusions

The Pop Shoppe has received extensive media attention and features for its innovation of developing and nurturing fresh retail concepts in South Africa. After opening their second branch in the little farming community of Somerset East earlier this year, The Pop Shoppe plans to open 10 branches around the country in the next 18 months including Johannesburg and Durban. ○

Trunk Club

USA - Chicago

A Chicago startup disrupting the Men's fashion industry with a stylist infused e-commerce membership business. Bringing unique service elements directly to the consumer, Trunk Club provides hand selected outfits for purchase either in showrooms or by mail and develops strong relationships with clients. A feeling of luxury and authenticity is created without the pressure to buy.

Key data

- **Format:** B2C
- **Year Opened:** 2009
- **Store Location:** Chicago (US)
- **Number of Stores:** 3 locations, 1 opening in next few months
- **Number of countries:** 1 - US
- **Product Mix:** Apparel, men's furnishings and leather goods



Market opportunity

Trunk Club was the first of its kind to change the traditional shopping experience by appealing to men who don't like to shop, or don't have the time/patience; you can now look great without the work. The genius of the model is in the e-commerce platform offering premium clothes, personal stylists and zero membership fees. Through an online portal, customers build their unique profile and can communicate directly with a stylist

who delivers options. Stylists are not incentivized to sell you items you don't like, want or need, and focus on curating collections specific to your personal style. Trunk Club carries many high-end and luxury brands.

Innovative Qualities

The company is helping males to discover designer clothes without the hassle of shopping. By providing free services including home try-on, you only

pay for the clothes you keep, and send back the ones you don't like. The online store provides a unique selection and wide array of merchandise from apparel to leather bags and beyond. Once you have worked with a stylist, they can begin sending you outfits on a recurring basis, otherwise known as the 'Trunk Program', where trunk frequency is defined by the customer. With a unique brand repertoire they make it easy to find clothes for every part of your day, within variable price points. Similar to luxury department stores, TC price points align well by department.

Conclusions

Since opening shop in December of 2009, Trunk Club has grown from four to over 300 employees. With three locations in Chicago, Dallas and DC metro areas, the brand is focusing on rapid expansion of showrooms to further integrate and blend the online/offline experiences. In addition to showroom expansion, Trunk Club for Women is another potential venture on the mind of the CEO, and the company has been recently acquired by Nordstrom which should fuel more rapid expansion. ○



RETAIL TRENDS CUSTOMIZATION

Birchbox

USA - NYC

Birchbox, the subscription-based beauty product service model stepped up from online and recently opened a store in New York City's SoHo neighborhood. The first bricks-and-mortar location for the brand provides a new way to reach consumers and brings their products and experience to life.

Key data

- **Format:** Bricks-and-mortar
- **Year Opened:** 2014, online in 2010
- **Store Location:** New York City (US)
- **Number of Stores:** 1 (US)
- **Size of Store:** 418 sq.m.
- **Product Mix:** Beauty products, lip colors, eye liners, creams, face and hair products, accessories



Market opportunity

The company began as an online beauty sample delivery start-up who has now made their permanent entry into a retail location, after toying around with pop-up shops and mini-concessions. Thinking outside the box, the brand has created another route to growth with the development of the store while enhancing the online business. Birchbox has created a one-stop shop for a curated selection of beauty products, experiential stations and services, where no other retailer has gone before.

Innovative Qualities

Birchbox strategically planned this store to be merchandised similar to "your best friends closet" aimed at

discovery and exploration. The space offers a curated selection of over 2,000 products and 250 brands. Customers can BYOB (Build Your Own Birchbox), buffet style, for a small cost of \$15, only \$5 more than the monthly subscription for women. Customers can also shop by category whether it be for lips, hair or eyes, instead of by brand. Technology is placed throughout the store including television screens to captivate customer's attention (at hair and nail spots), in addition to iPads placed next to feature products. There is a strong focus on omni-channel integration and customer involvement. The store presents a "communal" feel, with a shoppable environment geared

to groups with areas to test products out. There is a strong tie between the online subscribers and the curated merchandise in store; Birchbox features a 'shop the top' section featuring the top ten Birchbox products rated by subscribers. To engage customers further, sampling stations are strategically placed throughout the store including q-tips, cotton balls and wipes to test out ALL displays. Birchbox has also integrated services into their model offering hair styles and classes focused on makeup and skincare.

Conclusions

The beauty product retailer has created a space accessible for the casual shopper as well as those just looking for new ways to discover and shop for beauty products. Birchbox was created around the idea of discovery, and opening the retail space gives customers the opportunity to do just that. ○

Bite Lip Lab

USA - NYC

The retailer mixes art and science with beauty under one roof. By integrating customization and array of product selection, customers can combine lip colors and create one unique shade.

Key data

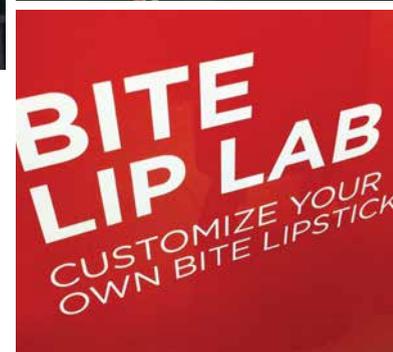
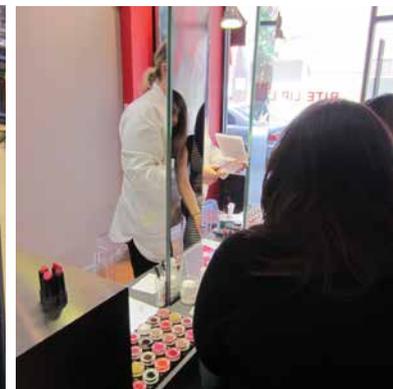
- **Format:** Bricks & mortar, wholesale
- **Year Opened:** 2014
- **Store Location:** SoHo, New York (US)
- **Number of Stores:** 1
- **Number of countries:** 2- US & Canada (Wholesale)
- **Size of Store:** 46.5 sq.m.
- **Product Mix:** Lipstick, High Pigment Pencils, Lacquers

Market opportunity

Bite has delivered a creative avenue for beauty connoisseurs to visit their store and explore how retailers can blend customization in with the traditional retail model, by offering a unique experience for customers to create their own. Additionally, the Lip Lab also offers more traditional products including High Pigment Pencils, Crème Lipsticks, Honey Lip lacquers and a variety of other offerings. The Bite brand uses organic, food-grade ingredients to make their products, a unique mixture of beeswax, Argan oil, shea butter and FDA-approved colorants. Opening of the Bite Lip Lab was followed by the success of their sales at Sephora and SoHo pop-up which opened in May of 2014, and has since been replaced with the first ever brick and mortar.

Innovative Qualities

Bite begins the patent pending, by appointment only, DYOL (design your own lipstick) process by combining different existing lip colors, and sampling mixes of other colors, while layering on other shades to alter the look. The entire lipstick making process



takes about seven minutes, and involves melting down the different bullets of lipsticks, adding a scent (cherry, violet, peppermint or superfruit) and pouring the mix into a lipstick mold. The formula will then harden on a cold plate, and be ready to take home soon after. You can take home your customized creation for \$36, or add a crème deluxe to your lipstick for \$48.

Conclusions

The store creates an innovative way to add customization to the retail model, and will be closing after summer for a re-design. The new store design will feature a more interactive experience and include “play-stations” for color. ○

SIR Tailor

VIETNAM - Ho Chi Minh City

A luxury bespoke tailoring company, SIR Tailor offers customers a new fashion concept “Truly your own”, specializing in shirts, polo shirts, blazers, trousers, chino pants, suits, and accessories for men.

Key data

- **Format:** Concept Store
- **Year Opened:** 2014
- **Store Location:** Hochiminh City (Vietnam)
- **Number of Stores:** 1 in Hochiminh City
- **Size of Store:** 80 sq.m.
- **Product Mix:** Shirts, polo shirts, blazers, trousers, chinos pants, suits and accessories for men.



Market opportunity

In the global fashion marketplace, high-end brands are experiencing considerable growth in the made-to-measure (MTM) segment. In addition, ready-to-wear garments (RWG) of Italian brands have also seen increased sales growth in the last year. Both of these growth segments have spurred a renewed interest in bespoke tailoring. In 2014, SIR Tailor opened its doors to cater to the demand of successful people who want their own identity and style in menswear fashion.

Focusing on the high-end custom tailor segment, SIR Tailor established its brand identity in the marketplace as a custom-shop known for innovative designs and the use of fabrics and materials. SIR Tailor designers study the latest successful European collections including Hubschers and Bodoni to bring their knowledge to the showroom. In addition, SIR customers can create their own style by viewing European

clothing samples inside the showroom.

Innovative Qualities

SIR Tailor was founded by garment industry leaders that have been in the textile and apparel industry for many years. SIR business founders have aligned their relationships in every aspect of the garment industry from supply chain including material sourcing, production capacity, design, as well as work experience from design houses in Europe.

The combined success factors of customer design innovations, unparalleled tailoring techniques, and outstanding customer service make SIR Tailor a unique success story. The SIR design team helps customers design their own clothes with the assistance of an image consultant. Next, SIR in-house expert tailors apply the latest industry techniques into the bespoke tailored clothing piece.

The SIR showroom is ideally located in the heart of Ho Chi Minh City with a unique interior concept that is not only a showroom but a place to relax, while enjoying a nice cup of tea or coffee and listening to Jazz music. In addition, SIR’s enthusiastic team provides customers with great service and an unforgettable attitude.

Conclusions

SIR Tailor is one of the pioneering startups in Vietnam in the bespoke tailoring segment that is satisfying customers with quality products and services.

In addition to the flagship showroom in Ho Chi Minh, SIR Tailor is planning to open the next showroom in Hanoi in 2015. Additional showrooms are planned for New York, Singapore, Tokyo, and London. ○



RETAIL TRENDS
EXPERIENTIAL RETAILING 2.0

adidas HomeCourt

CHINA - Beijing

With the new concept store developed by adidas in Beijing, the retailer aims to celebrate adidas' sports heritage and provide consumers with a unique and interactive retail experience. Bringing the passion of sports to adidas retail, some key features of the store include the "arena façade", the "team room" and the "shoebase at centrefield".

Key data

- **Format:** Flagship concept
- **Year Opened:** 2014
- **Store Location:** Beijing, China
- **Number of Stores:** 1
- **Number of countries:** 1
- **Size of Store:** 3,170 sq.m.
- **Product Mix:** Sporting goods merchandise



Market opportunity

adidas, the sporting goods brand recognized across the globe, seeks to put its consumers at the heart of its brand by creating a best-in-class retail experience across all its sales channels.

Innovative Qualities

Its flagship HomeCourt store encompasses both the branded store and ecommerce channels through the various features incorporated into the store. The Tunnel Entry, through which all consumers must pass to get to the store, is an attempt to shift the paradigm from point-of-sale to point-of-excitement. The Shoebase at Centrefield sits at the heart of the store where consumers are able to check out the latest footwear across categories digitally, in 2D and 3D. A specially constructed shoe bar, comprised of an interactive table and large touchscreens,

enables consumers to play and learn about the shoes benefits and technologies. It is also connected to the online adidas store, providing a truly seamless shopping experience. Last but not least, the Team Room represents the epitome of interactivity by injecting elements of fun and social activity.

Conclusions

With a commitment to recreate the shopping experience, adidas continues to invest in optimizing and interlinking business models to provide a better user experience across its various channels. It is devoted to staying ahead of changing consumer expectations, which are being shaped by ever-changing digital capabilities. Over the course of 2014, HomeCourt will be introduced to 25 other stores globally, beginning with Rio De Janeiro, Brazil. ○



Deus ex Machina Store & Café

ITALY - Milan

The Australian Deus ex Machina opened their first European flagship location in Milan, a hybrid and experiential store that combines the worlds of motorcycling, surfing and apparel alongside a café-restaurant.

Key data

- **Format:** Flagship
- **Opening:** 2013
- **Store Location:** Milan
- **Number of countries:** 5 flagship stores worldwide (Sydney, Bali, Los Angeles, Milan)
- **Number of stores:** 5 (Sydney, Bali, Los Angeles, Milan)
- **Size of store:** store 150 sq.m. + bar-restaurant 250 sq.m.
- **Product Mix:** Motorcycling, surfing, apparel and accessories

Market opportunity

In the world of retailing, clients continue to favor concepts that express a strong and clearly-defined identity, while combining diverse attributes. This is the case of Deus ex Machina, a format born in Australia specializing in motorcycling, bicycling and surf boards, that also created a line of clothes and accessories.

Innovative Qualities

The store's diverse assortment includes apparel, shoes and accessories, as well as motorcycles, bicycles, surfboards, snowboards and skis. Besides having a multi-product offering, the format is also multi-brand, with 70% of the products being exclusive to Deus. Each product category is narrated in a vignette inside the store, using different display arrangements and unusual items to create a story. A unique aspect of this flagship compared to other Deus stores, is the presence of a bicycle repair and production shop, which distributes bicycles to the other Deus stores, while also adding a service component into the mix.

Alongside the store, there is a 250 m²



restaurant-bar, opened in partnership with well-known Milan food businesses. Due to its exciting and unique atmosphere, the restaurant has become a popular destination for meetings and events. The restaurant provides about 50% of the total revenue for the concept, with clothes responsible for 30% and motorcycles and bicycles for the remaining 20%.

Conclusions

In line with the positive results from the Milan flagship opening, the entrepreneurs who purchased the franchise license for Italy, Spain, Greece and Poland (and all of Europe for motorcycles) have plans to open two other concepts in Rome and Madrid. ○

Eataly Smeraldo

ITALY - Milan

A triumph of food and visible food preparation areas combined with free music.

The unique concept blends food and food service with theatre. The unique space was been developed inside an 18th century theatre, with a focus on creating a historical, cultural and social space.

Winner - WRC's 2014 Best New Retail Concept Award.

Key data

- **Format:** Food and wine center – direct consumption and sale
- **Opening:** 2014
- **Store Location:** Milan (Italy)
- **Number of Stores:** 24
- **Number of Countries:** 5 (Italy, Turkey, Japan, US e United Arab Emirates)
- **Store size:** 5,000 sq.m. on 4 levels (sales, consumption, didactic area and conference hall)
- **Product mix:** 10,000 products, 15 small restaurants and 5 open food labs



Market opportunity

Eataly creates a story behind the food, with an environment that meshes both food and food service, and includes a series of additional activities to create an overall experience in food retail. Eataly continues to follow their mission in delivering quality products to all clients at multiple price points. With much success, Eataly has continued expansion and has developed into a top New York tourist attraction, in addition to the newly opened Chicago location. The brand is blazing a new trail in the food retail business.

Innovative Qualities

The design and location of the newest concept, the historical Smeraldo Theater in Milan, is focused on traditional and local food product offerings.

Throughout the store there is various

open-air food areas filled with artisanal preparation: fresh pasta, bakery with wood oven, pastry, the 'ino' panino and the traditional 'piadina'. Interactive spaces are also located throughout the store including a mozzarella show, where fresh mozzarella is made every day under the eyes of the clients. On the ground floor, there is the bookstore of the Librerie Coop and a section for kitchenware and beauty products. A gourmet restaurant, Alice, inside the space occupies an area of 200 m², with an open kitchen and great glass wall overlooking the square. A large space has been reserved for design, as a homage to Milan.

Conclusions

Although the cost for opening Eataly

Smeraldo was quite high at €40 million, the store revenue exceeded expectations, amounting to €12.5 million in just four months. Revenue for the store is more or less equally divided between the market and the restaurants. Eataly has major expansion plans for the next 2 years including the build of 6 additional Italy locations, 3 in North and South America (Los Angeles, Sao Paulo and Washington), 3 in Europe (London, Paris and Munich), 3 in Japan and 1 in Russia (Moscow). ○

EDEKA Niemerszei

GERMANY - Hamburg

EDEKA Niemerszei turns grocery shopping into a special experience. The supermarket aligns its brand among its target group and offers customers an unusual and high-quality store design and assortment.

Key data

- **Format:** Supermarket
- **Year Opened:** 2013
- **Store Location:** Hamburg, Germany
- **Number of Stores:** 1
- **Number of Countries:** Germany
- **Size of store:** 2,000 sq.m.
- **Product Mix:** Groceries



Market opportunity

Increasing competition prevails among saturated markets within the German food retail sector. Consequently, conventional supermarkets have to provide an exceptional shopping experience for their customers in order to create a competitive advantage. Supermarkets have to address issues such as quality, locality, trust, service, freshness and enjoyment. A successful example is EDEKA Niemerszei, a supermarket in Hamburg. The autonomous supermarket addresses the needs of its target customer within the multi-cultural and upcoming district of St. Georg.

Innovative Qualities

For EDEKA Niemerszei, the shopping experience is the priority. Seating areas

invite customers to stay and relax. The store design is high quality; subtle paint and lighting direct the customer's attention to the products. Plants, as well as furniture made of solid wood, support the impression of quality. One highlight is the store-within-a-store of Bernhard Paul, the founder of the circus Roncalli. It houses fine chocolate and other selected products.

The assortment is aimed at well-paid professionals and singles. Although the focus is on convenience, organic and premium products, as well as selected specialties from abroad are being increasingly offered. Highlights include an 8-meter long salad bar, dry-aged beef presented in a glass cabinet, a refrigerated room for cheese, and a fresh fish counter.



Conclusions

EDEKA Niemerszei is an example of a modern and innovative grocery store that has successfully taken price out of the equation by offering shoppers quality and experience. ○

Jelmoli Food Market

SWITZERLAND - Zurich

The new “Food Market” from Jelmoli is trying to bring Food-Retailing to a whole new level. They want to “celebrate the Slow-Food-Concept”, selling only exclusive groceries with much emphasis on regional and ecological origin.



variety of delicious snacks and drinks. Food culture becomes a real experience. In addition to the shopping offer they also have specific shopping advices, ranging from cooking tips as far as booking your personal shopping guide. Cooking classes can be individually requested and booked.

humidor, including a cheese fondue section for take-away or immediate consumption. Due to its sheer size, the humidor is essentially a walk-in fridge featuring more than 150 varieties of cheese. It has been carved out of local oak wood and is kept at a constant 14 degrees Celsius with 90% humidity.

Key data

- **Format:** Food Market
- **Year Opened:** 2014
- **Store Location:** Zurich, Switzerland
- **Number of Stores:** 1
- **Number of countries:** 1
- **Size of Store:** 2.200 sq.m.
- **Product Mix:** Food culture and service

Market opportunity

The new food market of the largest department store in Switzerland is unique in Europe and presents an exciting tenant mix consisting of some of the best and most competent food providers in the region. The design of the 2.200 sq.m. Food Market is equivalent to a modern, contemporary mart hall where food meets fashion. In the Jelmoli Food Market, most tenants offer seating capacity and serve a whole

Innovative Qualities

It's all laid out in the style of a market where you can buy not only the ingredients you are looking to cook, but also many of the accessories. There is a Buchmann bakery offering fresh bread, an extensive Mövenpick wine and spirits area, a new frozen yogurt counter called “Wonderpots”, as well as the Pernet fresh fish, food and vegetable counters and a Kauffman butcher. Another highlight is Switzerland’s first cheese

Conclusions

The concept focus of Jelmoli Food Market is convenience. Clients are free to combine foods and beverages from the various vendors - just like in a traditional marketplace. Except that here, you are in the middle of Zürich, only a few steps away from the bustling Bahnhofstrasse. All the vendors are well known for their high-quality products. ○

Pop Up Place by Pop Up Force

SWEDEN

A pop-up concept, continually giving consumers the excitement of a different experience and shopping opportunity, while providing an opportunity for brands and retailers to explore a new target group, theme, channel or location for a limited time period.

Key data

- **Format:** Pop Up Store Concept
- **Year Opened:** 2013
- **Store Location:** Stockholm, Göteborg, Malmö (Sweden)
- **Number of Stores:** 4
- **Number of countries:** 1 (Sweden)
- **Size of Store:** 100 sq.m. (approximately average)
- **Product Mix:** Varies, so far mainly within fashion



Market opportunity

A store strategy of ever variability and versatility puts the experience-hunger of today's consumers to the forefront. With constant flexibility and change it is coherent with contemporary life and implies terms of ever new information flows, digital input and endless opportunities for online entertainment. The recent year's boom of pop-up stores in retail and marketing clearly reflects that. The novelty of the temporary concepts is a perfect platform to create a hype around a new product or line resolving in lots of PR, word of mouth and great store traffic.

Innovative Qualities

Pop Up Place continuing offers consumers new and limited experiences.

The content and decor changes in the same location and with the same staff. As each concept is open for a limited period, the customers get a different experience every time they visit the place. The concept offers brands a temporary sales and marketing channel. In the late summer of 2014 you find the Nordic pureplayer Bubbleroom occupying the stores in Göteborg and Malmö showcasing Pop Up Place as a opportunity for pure players going offline. Another retail partner is Voilá with a avant-garde accessories store including "The Fourth Dimension" and 3D-printing being the first place to give Swedish consumers the chance to design and print their own products.



Conclusions

So far Pop Up Place consists of 4 venues, but more are following around Sweden as the creative Director of Pop Up Force, Sebastian Kjersén, sees great potential in the concept. Since the opening of the first store in the summer of 2013, the interest for the concept has been fairly good. The latest concept is called Limited and is based on offers from different small e-tailers and brands not otherwise able to display their products in a brick and mortar setting. ○

PRESSO Kook Sharing Experience

ITALY - Milan

Usage and fluctuating pricing are the hallmarks of this store / experiential showroom / club. Available by a members-only reservation system, in an environment with a sophisticated and friendly atmosphere: a new concept for urban dwellers to spend their leisure time.

Shortlisted for the WRC Best New Retail Launch Award 2013.

Key data

- **Format:** B2B and B2C concept store
- **Opening:** 2013
- **Store Location:** Milan
- **Number of Stores:** 1
- **Number of countries:** 1 (Italy)
- **Store size:** 400 sq.m.
- **Price range:** Average €50-€150 for each home
- **Average monthly traffic:** 1,800 people



Market opportunity

In urban environments, socially active people are constantly on the lookout for unique and customizable ways of spending their leisure time. To seize this opportunity, three young entrepreneurs have launched PRESSO, a unique concept that combines an experiential and e-commerce showroom with a members-only club available by reservation only.

Innovative Qualities

The concept is divided into three environments called Houses, each with a different size, style, facility and assortment, and are equipped with

everyday household products provided by PRESSO's partners, a number of renown brands. The goal of the concept is to directly and fully involve customers through the use of product experiences. Assortment categories include food and beverage, furniture and accessories, electronics, domestic appliances and domestic textiles (e.g. Alessi, Ballarini, Electrolux, Campari). Categories and brands share similar targets and product areas: the homes of the clients, which are represented here in a coherent fashion with a proper application of category management. Customers can reserve by paying an

hourly fee, listing their requirements and desires for the purpose of creatively customizing their PRESSO experience. Reservations are made online or via phone. There is a profiling system connected to a loyalty program which is shared with the various partner brands. The business model calls for contributions from suppliers and offers clients the possibility of buying everything that is found in the concept store. The model is flexible in terms of pricing, which fluctuates constantly based on demand, using an algorithm like the ones used by airlines.

Conclusions

After an initial phase in which the concept is tested and refined, the project calls for the development of a franchising model, in Italy and abroad and, in the future, for the launch of a private brand. ○

Restoration Hardware

USA - Boston

A luxury home furnishings brand with strong brand heritage, and an offering including furniture, lighting, textiles, bathware, décor, outdoor, garden, and baby and children's products that are sold through multiple channels of distribution including Galleries, Source Books (catalogues) and websites.

Key data

- **Format:** A luxury home furnishings retailer
- **Year Opened:** 2013
- **Store Location:** Boston, USA
- **Number of Stores:** 70
- **Number of countries:** 2; United States and Canada
- **Size of Store:** 3,700 sq.m.
- **Product Mix:** Furniture, lighting, textiles, bathware, décor, outdoor, garden, and baby and children's products



Market opportunity

RH Design Gallery, housed in the former New England Museum of Natural History, is the largest outpost for RH. Sofas, tables, rugs and other decor are meticulously arranged in vignettes, with an emphasis on aesthetic. New product categories, including tabletop goods and "objects of curiosity" (architectural reproductions, faux antlers, iPod-compatible Victrolas), have recently been added as well. The intention is for customers to curate and customize their design aesthetic with the help of RH staffers.

Innovative Qualities

The Boston store's four floors offer a florist, located on the ground floor, as well as a number of showrooms and

several artful bedroom vignettes on the second level.

Signaling RH's evolution from home-furnishings purveyor to full-scale lifestyle brand are several spaces on the top floor. In addition to a wine bar, there's a quartet of club rooms: a billiard lounge with a rehabbed Brunswick pool table, a cinema room where TVs play classic movies, an inviting library packed with vintage novels and design books, and a pub serving craft beers at a century-old bar surrounded by Motown and rock-and-roll memorabilia.

The club rooms share the floor with a Paris-themed "conservatory and park," where outdoor furniture is displayed among artificial olive trees and a 24-foot-tall steel replica of the Eiffel Tower.

And finally, the lower level is dedicated to RH's Baby & Child collection, featuring pint-size leather chesterfields and armchairs.

Conclusions

During a transition from a public to private company in 2008, the retailer has since reduced its number of stores and shifted their focus to more website and catalog activity. Existing retail locations are being used as showrooms for RH's products. Additionally, RH has paid considerable attention to increasing catalog traffic as they recently introduced a 3,300-page, 17-lb "source book". ○

Starbucks on rails

SWITZERLAND

SBB (the Swiss Federal Railway) and Starbucks cooperate in the Food-Sector on the rails. In a two-deck wagon with the take-away store downstairs and a served café at the upper deck, Starbucks offers their assortments in Swiss trains.

Key data

- **Format:** Café – food service
- **Year Opened:** 2013
- **Store Location:** Switzerland
- **Number of Stores:** 2 wagons
- **Number of countries:** Switzerland only
- **Product Mix:** Coffee, Tea, beer, wine and snacks



Market opportunity

Starbucks takes the opportunity to offer their products to customers who have extra time during a train ride. In cooperation with the Swiss Federal Railways, Starbucks and SBB have remodeled a railway wagon. There are seating facilities and massive cozy wooden tables. Customer can enjoy their train ride with Starbucks products and they also have the possibility to read or work in those wagons. The assortment is close to the ones in the classic Starbucks stores, but in addition they sell beer, wine and some (warm) snacks. Prices are consistent with a traditional Starbucks.

Originating in Seattle, Washington, Starbucks has strong ties with

Switzerland. Many of their coffee machines are produced by the Swiss company Thermoplan.

Innovative Qualities

To fulfill this project, the two companies needed to develop innovative ideas. It is difficult to fit a Starbucks store into a train wagon, since the space is very limited. Another challenge was to define the offer of products. At first, Starbucks on rails started with nothing but coffee products. But after a few weeks and as a result of customer feedback, they also included alcoholic beverages (beer and wine) into the assortment.

This project still has the status of a pilot experiment, ending in 2015. Then, SBB

and Starbucks will decide what the next steps will be.

Conclusions

The cooperation between SBB and Starbucks and the idea of “Starbucks on rails” found much attention in the Swiss media. For the SBB, it is also an attempt to make railway restaurants, which make part of many trains in Switzerland more attractive for younger people. ○



RETAIL TRENDS
HYPER LOCAL

Casa Ametller Sense Intermediaris

SPAIN

Casa Ametller offers food products “Sense intermediaris” (without intermediaries), controlling and ensuring the value chain and eliminating costs that do not add value to the product. The concept is the result of vertical integration of all processes to become a market reference of production and distribution of healthy and organic fresh products, sold at a great price-quality relationship.

Key data

- **Format:** Grocery store
- **Store Location:** Spain
- **Number of Stores:** 71
- **Number of countries:** Spain only
- **Size of Store:** From 120 sq.m.
- **Product Mix:** Grocery: fruits, vegetables, meat, biscuits

Market opportunity

Casa Ametller is taking advantage of the ecological and healthy products market trend. The retailer offers proximity produced fresh products (Km0) as well as many bulk products such as wine, oil, and dried fruits that are gaining interest of the savvy consumers. Its creative Retail concept, “Your country house of the 21st century” is well executed through its store visual merchandising as well as its good quality fresh product offering. The first Casa Ametller store opened when two brothers from a family dedicated to farming since the 19th century, decided to take a step forward, and sell what they were producing in their farms in El Penedès (a region in Spain), directly to the consumers through their own store; “We produce for you”.

Innovative Qualities

A family company of fresh food product producers selling directly (without intermediaries) through their own chain of well executed stores. The stores are the essence of Casa Ametller’s



brand experience for the consumers. They are in key locations, offering good quality fresh products at a good price, with attractive visual merchandising to enhance its natural and proximity origin. Some partnerships have been made to complement the assortment offering, such as fresh meat, olive oil, chocolates and canned food.

The company focuses on sustainability and health, which is why they promote healthy habits events, use electric tricycle for home delivery service, have nutritionist staff in stores, and offer healthy cooking workshops “El Taller de Casa Ametller”; also healthy cooking recipes are available on their website.



Conclusions

On average, the company is growing by 20% every year. In 2013, they hired 150 people to reach a workforce of 1,000 people and opened 30 more stores. In 2014, they expect to reach 100

stores throughout Spain. The turnover increased from 58 million euros in 2012 to 70 million in 2013. And as products are concerned, they have created sub-brands to cover the different product range segments. ○

La Place

THE NETHERLANDS

La Place has opened a new concept store where the basis of food and nature is the focus. Customers can enjoy and experience the methods of preparation of food from all kinds of cultures.

Key data

- **Format:** Food service
- **Year Opened:** 2014
- **Store Location:** Leiden, The Netherlands
- **Number of Stores:** 1
- **Number of countries:** 1
- **Size of Store:** 9,100 sq.m.
- **Product Mix:** Food

Market opportunity

For years, La Place has been able to be innovative and keep customers satisfied and interested in their restaurants and products. Although freshness has always been a central focus of their concept, La Place took it to the next level with their new concept store in Leiden. All ingredients for the dishes are fresh and unprepared, after which customers are taken along in the journey of preparing the dish. The basis of food and nature is not only found in the food but also in the interior. So, customers can enjoy a whole new experience of fresh food and its preparation. La Place profits from the trend of fresh and healthy food and secondly, attracts a lot of customers and is therefore a very interesting concept for other retailers to be near.

Innovative Qualities

A large variety of cuisines is available. Fresh fish, bread and pizzas are baked in the wood-fired ovens. Pastas are made in house as are the burgers, prepared in the in-house butchery. You can also find Japanese meat, waffles



from Brussels and Paris-like crêpes. Almost all ingredients are organic and La Place likes to use as much local products as possible. Experienced staff will prepare the dishes on the spot and customers can watch and experience while waiting. The freshly made food can be enjoyed in an industrial atmosphere with high ceilings and vintage furniture. Materials are recycled, like the scrap wood that is reused. Customers can also enjoy free Wi-Fi in the restaurant that houses 300 seats.

A terrace with an additional 160 seats is also available with a wide view of the old and beautiful city center of Leiden.

Conclusions

With its new concept, La Place offers a unique food experience and great meeting place for customers. The focus on the basis of food and nature will lead in the further development of La Place in the future. According to the company, there are a lot of possibilities to expand, also internationally. ○

MadMarked

DENMARK

“Local food for local citizens” a new, yet nostalgic grocery concept in Denmark based on locally sourced produce and regional specialties from small nearby suppliers.

Key data

- **Format:** Grocery Store
- **Year Opened:** 2013
- **Store Location:** Præstø, Store Heddinge, Skovsgaard, Lynæs, Svendborg (Denmark)
- **Number of Stores:** 5
- **Number of countries:** 1 (Denmark)
- **Size of Store:** 100 sq.m. (approximately average)
- **Product Mix:** Locally sourced everyday groceries including dairy, meat, fresh baked bread and handmade soap



Market opportunity

In a global and ever-changing era, consumers are continually drawn to local offerings as they represent an emotional attachment, identity and security. Local food suppliers have gained popularity in their offerings of unique, rustic ingredients and regional specialties; every product has a story. MadMarked (FoodMarket) taps into the above mentioned reinvention of local, contributing to the creation of pride and self awareness surrounding the project. Food entrepreneur and enthusiast, Birgitte Escherich, created the brand with the goal of cleaning up the food chain and creating cooperation between local, sustainable and organic suppliers.

Innovative Qualities

MadMarked's point of innovation lies in the conceptualization of the grocery store as a local hub with a focus on high quality, healthy options, sustainable production and a great sensory experience. In addition to their health conscious, experiential environment, the brand price matches Danish supermarkets by cutting out the wholesale level. MadMarked has created an industry standard, with honest and transparent positioning, focused on organic, biodynamics, and a sustainable process of production and distribution. Besides the local profile of MadMarked, the nostalgic feeling of the concept appeals to consumers.

Conclusions

So far, 5 stores have opened in small local communities, with 1 more to follow in the fall of 2014. MadMarked continues to work with local suppliers like Bridget's Beetroots and Peter's Apple Chutney to bring their products to life. The team behind the concept is currently recruiting existing grocers to convert to MadMarked with a vision of 50 stores by 2018. The challenge facing MadMarked is the difficulty of finding and signing new local suppliers for each new store in order to deliver both sustainable and competitive products. ○

Muddy Boots

UK - London

From supplier to retailer, Muddy Boots has created an innovative butcher concept, combining quality and British sourced meat with retailing, including extending opening times and a wine bar.

Key data

- **Format:** Small format
- **Year Opened:** 2014
- **Store Location:** London, UK
- **Number of Stores:** 1
- **Number of countries:** 1
- **Size of Store:** 150 sq.m.
- **Product Mix:** Meat, wine, cook books

Market opportunity

First established through supplier contracts with supermarket giant Waitrose and the UK's leading online supermarket delivery service, Ocado, Muddy Boots has filled a niche in the UK butcher market between the limited range and functional service of traditional butchers and the wide range of supermarkets. Muddy Boots offers a select range of every day cuts and meat-based 'ready-to-cook' products including premium burgers and meatballs, creating a modern meat shop.

Its focus on quality and sustainability resonating with London's increasing demand for locally sourced, sustainable meat, a key concern for consumers who are losing faith with supermarket chains. Bolstered by the recent addition of a click and reserve service, the proposition offers convenience, quality and a personal in-store experience.

Innovative Qualities

The current store in London's affluent Crouch End is a test-concept and the first foray into retail for founders



Roland and Miranda Ballard, ahead of extending their estate across London and potentially into other areas within the UK.

Its paired-back design takes its influence from Mediterranean and Scandinavian communal spaces, with a focus on communality and a stress-free environment. The store communicates this core message by positioning a large table as centre stage, with the point-of-

sale area to the side next to the meat counter.

Conclusions

The multiple product and service offering of Muddy Boots has pioneered a change in butchery retailing, responding to the increased demand for transparent sourcing, as well as introducing late openings from full-time cosmopolitan workers. ○

Original Unverpackt

GERMANY - Berlin

Sustainable consumption combined with a convenient shopping experience. This is the objective of the founders of "Original Unverpackt". Therefore, no disposable packaging is found in the store.

Key data

- **Format:** Package-free supermarket
- **Year Opened:** 2014 (september)
- **Store Location:** Berlin, Germany
- **Number of Stores:** 1
- **Number of Countries:** Germany
- **Product Mix:** Food, Near-Food

Market opportunity

Private households in Germany produce about 36 million tons of waste each year. A large portion of this waste, 16 million tons per year, comes from disposable packaging. Besides packaging waste, a large amount of food is thrown out on a daily basis. Many consumers are trying to counteract waste by engaging in sustainable practices. In addition, more and more retailers are tackling this issue. Therefore, a variety of innovative sustainable concepts have emerged. One good example is the supermarket "Original Unverpackt", which opened this summer in Berlin. Customers can bring their own containers or purchase reusable containers in store. This eliminates the need for disposable packaging and allows customers to buy the exact amount needed. The retailer focuses on convenience, sustainability, and ecology while avoiding the use of advertisements.

Innovative Qualities

Original Unverpackt offers a different way of shopping. The goal is to create awareness for the conscious handling

of food. Instead of having long rows of shelves with mass product, a carefully edited selection of unpackaged food is presented in bulk bins. Customers only take the amount they need. They are completely in control of the quantity of food they buy, paying only for the actual product, not the packaging.

All products are tested by the staff in advance. Original Unverpackt works closely with zero-waste and food experts. The store starts with more than 350 products for everyday use, including organic food as well as less expensive conventional products. This allows a broad group of customer to participate in sustainable practices. In addition, fruit and vegetables with slight damages or unconventional shape, which in a traditional supermarket would not be sold, remain part of the assortment.

Conclusions

Original Unverpackt wants to encourage customers to rethink the handling of food. The crowdfunding campaign, which financed part of the project, showed that the founders are on the right track.



Within only a few days the funding target of €40,000 had been exceeded. At the end of the 40 day crowdfunding campaign, more than €110,000 in funds had been raised. What makes the concept so successful is its accessibility and its appeal to a broad group of consumers. The founders have already planned the launch of additional branches. ○

radius39

SWITZERLAND - Basel

radius39 is focused not only on high quality products, but also on high environmental and local standards. All products in its store, café and bar are obtained from local producers within 39km of its location.

Key data

- **Format:** Store/café/bar
- **Store Location:** Basel, Switzerland
- **Number of Stores:** 1
- **Number of Countries:** 1
- **Size of store:** 150 sq.m. (bar/restaurant 120 sq.m.)
- **Product Mix:** Local food and non-food items

Market opportunity

radius39 focuses on the physical and local shopping experience. The bounded market restricts the potential customers to people living around the city of Basel. Target customers are people who share an environmentally friendly, local and social point of view and who support local producers or like to meet people while doing their shopping. This innovative place is led and owned by a husband and wife team. In their business model, flexibility is an important factor: in the morning, radius39 is a café and pastry shop; at lunch, menu items are offered; in the afternoon customers can shop or enjoy coffee and dessert; and in the evening patrons come together, sometimes to attend cultural events.

Innovative Qualities

radius39 focuses on products with high quality and ecological standards. It seeks to get customers into a local and ecological way of thinking. This store/café/bar aligns with the trend of local products and does not hesitate to have more expensive products. With every purchase, customers are supporting

local producers, the environment, and the initiative and idea of the store's owners. The assortment is diverse: radius39 sells honey, milk, meat, fruits, vegetables, chocolate, pasta, oil, beer and wine. In addition, they also sell certain non-food products like books and ceramics. The owners are both musicians and it is important for them to have personal contact with the customers. It is the combination of all of these points that makes radius39 interesting.

Conclusions

This business model has ecological and qualitative standards and as the name radius39 suggests, all of the products are produced within 39km of the store/café/bar. It is a bold initiative with the goal of combining shopping, dining and entertainment. The target audience is people who attach great importance to local and ecologically produced products, and who are willing to pay for a special shopping experience despite somewhat higher prices. ○



The Street Store

SOUTH AFRICA - Cape Town

The Street Store is Africa's first rent-free, premises-free, pop-up charity store, giving away clothes to the poor, for free. This pop-up consists of posters on the sidewalk, and runs entirely on donations. It's pretty simple: donors bring clothing and shoes they don't wear, and the homeless help themselves.

Key data

- **Format:** An open air pop-up store with all merchandise donated by local residents
- **Year Opened:** 2014
- **Store Location:** Cape Town, South Africa.
- **Number of countries:** 4, South Africa, Brazil, Canada and USA
- **Product Mix:** Donated clothing and shoes for the homeless

Market opportunity

The Street Store was first launched in Cape Town at the beginning of 2014. Working in Greenpoint, Cape Town, the founders of the concept wanted to do something to help the homeless that they often saw on the streets. The Street Store makes it easy for Cape Town residents to donate and easy for those in need to receive, since residents often don't know where to take unwanted items and/or who receives these items. Armed with a couple of retail designed posters to create the effect of a store, the founders took to the street and launched the first Street Store. Founded by an art director/designer and a copywriter, The Street Store became the world's first pop-up charity store and through the assistance of a non-profit organization based in South Africa, anyone in the city or around the world can host a Street Store.

Innovative Qualities

The Street Store has created a series of 5 posters that make up the entire

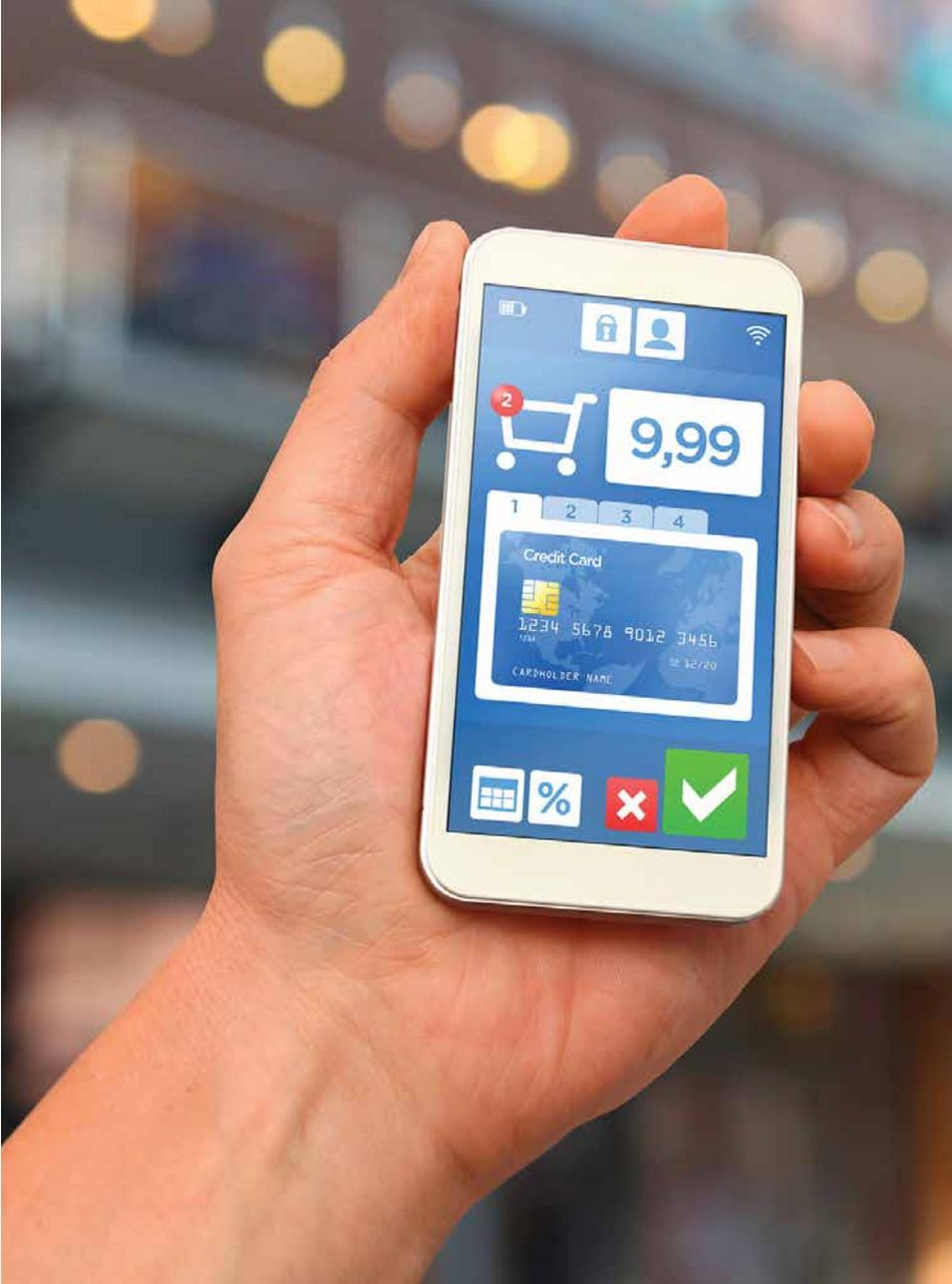


store. People making donations literally hang their clothing through a gap in the poster, and drop their shoes onto the specially designed flat boxes. The homeless browse through the clothing and help themselves. The founders thought that using posters to hang clothing would be a great way to promote different charity organizations but soon realized that to create and inspire change, they needed people to engage with the posters, not just view

them. That is how the world's first rent-free, premises-free, free "pop-up clothing store" for the poor was created.

Conclusions

Since launching and operating the first Street Store, additional cities have gone on to host more Street Stores in South Africa and around the world. These include: Johannesburg, Brussels, Sao Paulo, Vancouver, and San Diego, to name a few. ○



RETAIL TRENDS ONLINE OFFLINE MASHUP

Auchan, Click & Collect

FRANCE

Auchan is continually exploring new ways to reinvent the cross-channel retail experience. Since unveiling Auchan Drive in France, they have been testing several click and collect formats, including the “Auchan Direct Retrait Express” locker format. Additionally, they are experimenting with a self-serve click and collect service inside the branded supermarkets.

Key data

- **Format:** Click and collect dedicated formats and services
- **Year opened:** September 2013
- **Store location:** Self-service click and collect inside Supermarkets and click and collect store in Paris, France
- **Number of store:** 5 supermarkets for self-service click and collect, 1 store for Auchan direct Retrait Express
- **Number of countries:** 1 (France)



Market opportunity

Auchan has developed two different and extremely successful store formats under the Chronodrive and Auchan Drive banners that have accounted for almost €1 billion in turnover for 2013.

The retailer is continually exploring new ways to reach consumers using click and collect as the main outlet for innovation, as it is the most rapidly growing cross-channel service.

Innovative Qualities

The first test concept for the brand is Retrait Express, an ambitious version of Retrait Express, an ambitious version of Retrait Express, in a dedicated “store,” targeting city centers and pedestrian shoppers. Retrait Express main focus is on gaining additional market share in the segment and shying away from the supermarket atmosphere. Retrait Express opened this year in Paris with a wide range of

product, about 7,500 SKUs, which is a considerably larger offering than a standard Paris convenience store.

Retrait Express has extended their offering beyond lockers, by serving as a distribution hub, capable of storing 250 orders. The store is equipped with 2 cold-rooms; one for the fresh products, one for the frozen products. Customers can pick up orders within 3 hours of making an online purchase.

The second of Auchan’s latest innovations includes the click and collect service, which is currently in test mode inside the supermarkets. Orders are prepared for collection at a designated area inside the store, and can be purchased at the checkout together with other items being purchased inside the store. With no lockers and no assistant necessary, the customer is completely autonomous, and is provided with a



basic ID control at checkout. The service covers orders made on auchan.fr, and also includes other online retailers like Amazon and eBay.

Conclusions

Every retailer agrees that integrated cross-channel initiatives are the future of retail. Auchan is among the most innovative retailers in the world, exploring several options to invent the formats of the future. ○

JeansOnline, Easy Fit&Return

THE NETHERLANDS

JeansOnline introduced a new fitting service, Easy Fit & Return. A service that lets you try-on online purchases, without having to leave home. An express courier will announce its arrival with a text message an hour to half an hour in advance and will return after fifteen minutes of fitting time to take all the unwanted items back.

Key data

- **Format:** Solution for online retailers
- **Store Location:** www.jeansonline.nl
- **Product Mix:** Men's and women's fashion
- **Location:** The Netherlands



Market opportunity

JeansOnline is known to be the first Dutch online fashion retailer to introduce same-day delivery service. It recently introduced a lowest price guarantee for all its product, ensuring that customers never pay too much for a product, with an additional ten percent discount if it appears that they do. With their new fitting service, JeansOnline expands its customer-oriented focus further. Consumers are now able to enjoy the benefits of the online environment combined with the convenience of offline shopping. JeansOnline can on their side increase the delivery chance.

Innovative Qualities

Although it is possible to shop whenever and wherever you like if you shop online, it is not always certain you will fit the clothes you order. JeansOnline acknowledged this problem and

introduced Easy Fit&Return. It is now possible to try on clothes, even if you shop online.

An additional advantage is that it is also really easy to return unwanted or nonfitting items by giving them to the courier. You will know when the courier will arrive, because you have to choose a time slot of a maximum of three hours, so you can make sure you are present to receive and try on the order. This is the advantage for JeansOnline, since delivering to empty homes is a common problem today. Another benefit is that returns will go back to the stock much faster and will reduce the inactive stock for retailers.

Conclusions

JeansOnline is a good example of an online retailer that embraces the benefits of both online and offline shopping. In this way the service is an addition to their already customer



oriented focus that aims to give consumers the most advantages and least disadvantages of both worlds. With this creative solution, online shopping is fun and practical. And, it shows online retailers that creative solutions can also benefit their business and that it is possible to combine online shopping with service. ○

Kate Spade Saturday

USA - NYC

Kate Spade Saturday is the younger and more affordable version of its big sister, Kate Spade. Initially launched as an e-commerce pure play to reach its target customers, women ages 25 to 35, where they live, it has grown to include locations in Japan, Singapore and the US.

Key data

- **Format:** Women's apparel and accessories
- **Year Opened:** 2013
- **Store Location:** Soho, NYC (USA)
- **Number of Stores:** 13
- **Number of countries:** 3; Japan, Singapore, United States
- **Size of Store:** 280 sq.m.
- **Product Mix:** Apparel, accessories, beauty products, home products, and small furnishings



Market opportunity

The Saturday label was created by Kate Spade in an effort to reach the millennial customer. The first Kate Spade Saturday store opened in early 2012 in the very fashionable area of Harajuku, Japan. In the US, the brand was distributed exclusively online with the occasional pop up store front lending support, but now counts five US storefronts among their 13 locations.

Kate Spade Saturday is priced about 50 percent lower than the traditional Kate Spade label. Function and versatility are a focus, with designs that multi-task, moving easily from office to off-time. Additionally, while the Tokyo flagship includes a cafe, the US stores have partnered with local eateries for in-store events. The brand is now exploring how to integrate food into the business as

part of its push to make the stores “fun destinations.”

Innovative Qualities

The Saturday brand — more than three years in the making — offers a brightly colored collection of dresses, jackets, denim, t-shirts, sweaters and swimwear, in addition to a variety of accessories. There's also beauty and home décor and even Frisbees and skateboards.

Instead of traditional signage, Apple iPads are strategically positioned throughout the store, featuring content that is relevant to items in proximity. iPad content includes prices and product information, timely marketing messages, style suggestions with video, and user-generated images



to encourage engagement with the brand and its products. There is also a customization option with choices of color palates, patterns and monograms.

Conclusions

Kate Spade Saturday plans to open street locations, mall units and possibly kiosks in an attempt to continually innovate and go directly to the places where their customer lives and hangs out. ○

MyWays by DHL

SWEDEN

A crowdsourced e-commerce delivery concept in Stockholm based on a mobile app that connects ordinary people for a fast and flexible delivery of parcels.

Key data

- **Format:** Mobile app
- **Year Opened:** 2013
- **Store Location:** Stockholm, Sweden
- **Number of countries:** 1 (Sweden)
- **Product Mix:** Delivery of online orders



Market opportunity

When it comes to delivery, shoppers expect items to come soon, whenever and wherever they want. Following this, the German market leader in logistics, DHL, launched a unique platform called “MyWays” to facilitate last-mile deliveries throughout Stockholm by involving the city’s residents. It gives individuals the opportunity to deliver packages with products ordered online directly to end consumers. Using a specifically developed mobile app, the service connects people who ask for flexible deliveries with those offering to transport parcels along their daily routes for a small fee.

Innovative Qualities

In practice, MyWays works by the recipient adding their parcel to the



platform. Once registered in the system, the package is then available for other residents to pick-up from a DHL service point and deliver at the stated time and place in return for the offered delivery fee – a credit system that can be exchanged into money.

With MyWays, DHL has come up with a delivery service taking advantage of ongoing trends of crowdsourcing, digital mobil revolution, cross channel and eco-friendliness. The innovative project connects the users socially in real time and gives them the opportunity to save time and earn money, respectively. In addition delivering packages by private individuals along their daily routes is beneficial to the environment.

Conclusions

MyWays was initially launched in September of 2013 and piloted until the end of year. The deliveries were handled mainly by students and the reactions were positive. Early tests with Swedish outdoor company Adnature also suggested that Stockholm’s residents embraced the flexibility of MyWays. In early 2014, MyWays hosted a cinema night for the users of the platform and players of the game “MyWays Delivery Challenge” to leverage the social aspect of the platform. ○

Rakuten Cafe

JAPAN - Tokyo

Rakuten Cafe is an extension of the marketing and promotional services that the brand offers beyond the online channel, Rakuten.com. The cafe targets a new audience and encourages them to explore Rakuten services and offers in a relaxed atmosphere, while enjoying sweet treats and beverages.

Key data

- **Format:** Cafe
- **Year Opened:** 2014
- **Store Location:** Tokyo, Japan
- **Number of Stores:** One
- **Number of countries:** 1 (Japan)
- **Product Mix:** Snacks and beverages, as well as information on financial services



Market opportunity

Rakuten Cafe is a cozy eatery that doubles as a playground for all-things-Rakuten. In addition to serving menu items influenced by Rakuten Ichiba (Rakuten's online marketplace), the cafe offers information to the public on everything from financial services to Kobo eReading (a Canadian ebook reader that Rakuten purchased), and of course, the online marketplace. Kobo eReaders are located throughout the café for customers to freely use, in addition to complementary use of electrical outlets and mobile phone chargers.

Rakuten Cafe opened in May 2014 and is part of Rakuten.com Shopping, the largest e-commerce marketplace site in Japan.

Innovative Qualities

Created as an additional marketing channel for Rakuten Ichiba Retailers, the café seats 85 guests over three floors and offers nine types of seasonal sweets, along with pizzas, bagels, soft drinks, coffee and alcohol. All of the menu items are curated based on the bestselling products on Rakuten Ichiba. Rakuten Cafe offers customers multiple payment methods, including Rakuten Edy (the company's contactless payment technology) touch payments and Rakuten SmartPay mobile credit card payment processing service. In addition, a concierge is on duty at all times, ready to answer any questions customers might have about the retailer's services.



Rakuten Cafe's design marries modern and traditional Japanese aesthetics, defined by straight lines, natural materials and understated sophistication.

Conclusions

With Rakuten Cafe, the retailer hopes to create a venue that will introduce new audiences to Rakuten Ichiba's services and to offer an additional marketing channel for merchants of its website. ○



RETAIL TRENDS RETAILVENTION

Dial, Aldi's Pop-Up Restaurant

UK - London

Discount supermarket retailer Aldi is known for its low cost range of products. In 2013, it partnered with Michelin starred chef Jean-Christophe Novelli to open a one-day pop-up restaurant in the heart of Oxford Street's F&B hub, Portman Square.

Key data

- **Format:** 1 day pop-up restaurant
- **Year Opened:** 2013
- **Store Location:** London, UK
- **Number of Stores:** 1
- **Number of countries:** 1
- **Size of Store:** 200 sq.m.
- **Product Mix:** Fine dining



Market opportunity

The strategic aim of the launch was to showcase the value of ingredients available at Aldi, highlighting its quality offering at affordable prices, and turning the discounter's image on its head. In the wake of economic recovery, Dial attempted to convert those middle-class customers at risk of defaulting back to their former, higher-priced grocers.

By associating the brand with Michelin starred chef Jean-Christophe Novelli, dubbed 'England's finest French chef', Aldi also directly addressed the stigma attached to lower-priced products, to ensure that Aldi was first choice for Christmas food spending.

The pop-up launched at the time that Aldi disclosed figures showing it had equaled Marks & Spencer in terms of food sales, while also seeing overall sales grow by 31.7% in the year to

October 2013, compared to just 13.1% growth at key German competitor Lidl.

Innovative Qualities

The fine dining experience at Dial included a menu of beautifully presented lobster, venison, and scallops, within the lavish setting of private member's club Home House. The menu successfully illustrated the potential to elevate Aldi ingredients and resulted in a strong PR buzz within the capital. The launch of Aldi's Private brand, showcased by the pop-up, also encouraged shoppers to buy private label products, reducing the cost associated with stocking national brands.

At £17.90 per head, the pop-up highlighted Aldi's newly launched Christmas range, building a strong association with industry excellence and

highlighting the inclusion of premium products within the range. It is a prime example of a discounter's successful execution of a campaign to launch a premium, seasonal product range for Christmas, and boost of its credentials to appeal to a growing middle-class segment, while maintaining a value led proposition.

Conclusions

Ahead of the characteristically indulgent Christmas period, Aldi positioned itself as a grocer of quality, offering premium products at the lowest prices. It shook off the discount image that tends to repel those of a higher social demographic, in time for consumers' big Christmas spend. ○

Everlane

USA

Everlane is an online-only, vertically integrated clothing brand. The retailer produces everything it sells from scratch and on average, doubles the price it costs to produce each piece. Many retailers add an 800 percent markup by the time the product has gone through all steps of production.

Key data

- **Format:** An online only apparel retailer for men and women
- **Year Opened:** 2010
- **Number of Stores:** Online only
- **Number of countries:** Ships to two countries, the US and Canada
- **Product Mix:** Mens and womens apparel and accessories

Market opportunity

Launched in 2010 as a startup, Everlane produces everything it sells from start to finish. It chooses which fabrics to buy, what colors to dye them, and what clothing to make. Everlane practices “radical transparency,” which means that in addition to price and thread count, Everlane shoppers will see the care instructions, the height of the model pictured, and the product’s origins, including the factory behind each item the retailer sells.

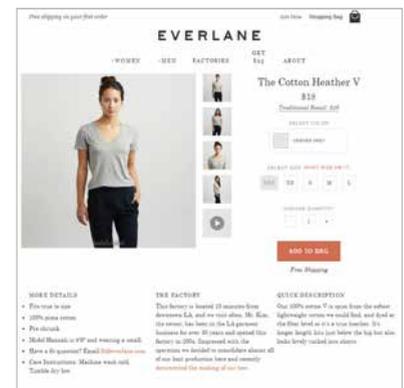
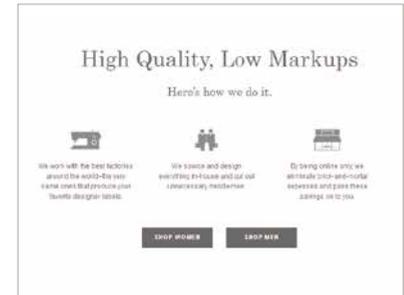
Innovative Qualities

Originally, Everlane’s focus was quality without markup, but they soon realized consumers wanted to know where their products came from. This launched the brand’s emphasis on transparency, something that was missing in the fashion and retail market. Through the supply chain process, consumers know where items are made, how much they cost (usually marked up 2X versus as much as 800% at other retailers), and how much they’re paying. Unlike many other retail stores, Everlane isn’t concerned about creating multiple designs and giving the consumer

options. It wants to make one T-shirt really well. The company releases one or two items at a time and orders them in small batches. It then observes the buying patterns of its customers. The intention is for Everlane to gain feedback on that product and create an updated version before placing another inventory order. Similar to how a tech firm launches versions of its digital products, slowly working towards to the perfect T-shirt, weekender bag or cashmere sweater—and the right supply of them.

Conclusions

The company initially launched with high-end, basic apparel under \$100, but recently ventured into higher price points with items such as silks, outerwear, shoes and leather totes that cost upwards of \$425 and would arguably cost \$1,000 elsewhere. Sales have grown 200 percent in 2014 Year over Year. The company plans to add 30 additional staffers by the end of this year and just recently opened a design office in New York City. ○



HelloFresh

THE NETHERLANDS

No more shopping queues! Sit back and relax while HelloFresh sources all the ingredients for your recipes and packs the exact quantities you need. HelloFresh makes your life more comfortable by sending food boxes to your home on a regular basis. They do all the thinking and planning, so you can focus on the fun part: cooking and eating!

Key data

- **Format:** Online food subscription
- **Year Opened:** 2012
- **Store Location:** www.hellofresh.nl
- **Number of countries:** 7
- **Product Mix:** Food and recipes



Market opportunity

We all lead busy lives nowadays, we are time poor but nevertheless we all want to cook with fresh and healthy ingredients. HelloFresh makes sure that everyone is able to cook great meals at home. People tend to buy too much ingredients, but HelloFresh overcomes this problem by packing all the fresh ingredients in the exact quantities the consumer need for the recipes. HelloFresh furthermore solves the well-known dinner dilemma. By creating new recipes including photos of every step, you are able to be inspired and cook quick, nutritious, and delicious meals at home. Not too much time? All recipes can be prepared within 30 minutes. HelloFresh on their hand

focuses on the growing target group of health and sustainable conscious people and delivers the products through subscriptions which ensures them regular and planned purchases and deliveries.

Innovative Qualities

HelloFresh is very service oriented. Besides their healthy food deliveries and inspiring recipes, the boxes are delivered for free and are no more expensive than your regular supermarket. The boxes are delivered on Tuesday evenings and in some areas it is possible to get a Sunday afternoon or Monday evening delivery. The nutrition of all the meals is monitored. HelloFresh calculates the

nutrition values themselves and makes sure you never eat too much fat, carbs or proteins. Their sustainable efforts are also noticeable in their product choice that is always tuned in on the current season. And, they try to get the products as local as possible. When food is left over at HelloFresh, it is donated to the less fortunate. Finally, the cardboard box is recycled after usage, just as a lot of other packaging of the products.

Conclusions

The first year after starting up in The Netherlands, HelloFresh delivered three million meals and expanded their business across the whole country. Since then, HelloFresh received more funding which will make it possible to expand and develop their services further. The goal is to serve at least 1% of the Dutch households by 2015. HelloFresh is also active in the US, UK, Belgium, Australia, Austria, and Germany. ○

Hutspot

THE NETHERLANDS - Amsterdam

A curator for an urbanized lifestyle, Hutspot was founded to provide a platform for creativity that enables ideas, products and people to become easily accessible for a mass audience. An initiative that brings all the good things together.

Key data

- **Format:** Curator for urbanized lifestyle
- **Year Opened:** 2012
- **Store Location:** Amsterdam, The Netherlands
- **Number of Stores:** 2
- **Number of countries:** 1 (The Netherlands)
- **Product Mix:** work of young designers, entrepreneurs and artists. (Everything!)

Market opportunity

Ambitious designers, artists and entrepreneurs are welcomed to connect with retailers. We also see that the heart of successful retailing lies in creating an attractive assortment in an environment where consumers love to spend time. Hutspot understands how to connect talent with retail and how to add new experiences to their concept continuously. They know how to be a place where consumers want to be. From a supermarket of design, fashion, beauty, foodies and workshops in the Hutspot store, drinks and get-togethers in the Hutspot Bar, all the way to a flexible office space. So how does it work? Hutspot searches for new talent offering them the chance to expose their products in their own space within the store. In exchange for a small service fee and a commission over the sold products, Hutspot makes sure everything is arranged.

Innovative Qualities

Hutspot is 'the place to be' both for suppliers and consumers. The staff strives to adopt new trends in an early stage, trying to stay one step ahead of the rest. The result is a place where

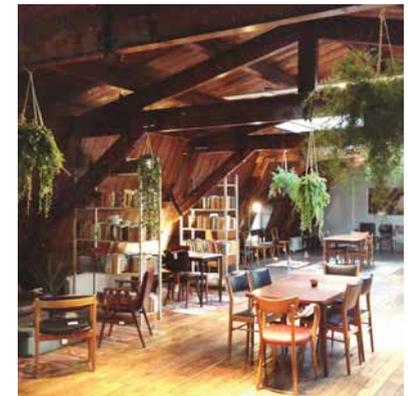


creative designers are proud to expose their products seven days a week, all year long. This results in a unique and continuously renewing assortment where an unexpected product potential is created which could not have been achieved individually by each designer. Everything is for sale in the store. From the art on the wall, the coffee that they serve up to the lamps hanging from the ceiling.



Conclusions

Hutspot has proven that it is possible to create a distinctive physical meeting place where consumers can work, relax, experiment, browse, taste and shop. They prove that innovation in retail is still possible and that it works! Within one year, the three young founders have translated their own vision and style into a profitable retail concept. ○



Meu Super

PORTUGAL

Meu Super revitalizes and modernizes the traditional shopping experience, while bringing Continente's brand products closer to the Portuguese people with a concept focused on a banner of stores in more residential and business areas. Quality, low prices and personalized service are assured in these high traffic locations.

Key data

- **Format:** Proximity store
- **Year Opened:** 2011 | 2014
- **Store Location:** 16 districts of Portugal, from north to south
- **Number of Stores:** 85
- **Size of Store:** 100-500 sq.m.
- **Product Mix:** Food and non-food

Market opportunity

Until 2011, traditional commerce had been suffering in Portugal. After the crisis, small format stores have shown unique growth attributes and currently own about 7.7% of market share. The extremely busy and stressful daily routines of consumers are forcing retailers to adapt and develop new concepts to deliver the shopping experience in a more convenient way, namely in stores closer to home. Sonae has capitalized on this idea of proximity and created Meu Super.

Innovative Qualities

Sonae created Meu Super in 2011 as a franchise business model. Last year, Sonae decided to incorporate traditional privately held stores by offering refurbishment fees and buyout at competitive prices in exchange for purchase centralization. This resulted in growing the business with 2 separate strategies.

The Meu Super concept works with fresh and daily products, complemented with Continente's brand products, flexible opening/closure hours and top



customer service. Meu Super presents promotions (loyalty card based) and competitive prices that lead clients to think twice before going to a larger store.

Points of innovation

- The business model consists in a Partnership Model with the retailer. There is no need to pay an entrance fee or monthly/annual royalties but Sonae MC supplies the stores.
- The stores are predominantly located in Urban Centers.
- Competitive pricing, similar to what consumers find in Supermarkets.

Conclusions

Meu Super has been increasing its success as a brand that is focused on proximity to customers, not only in terms of location of the stores but also on how the customers are treated inside, and by



offering products at competitive prices, giving extra value to consumers.

Sonae has recently been benefitting from the goodwill that was generated from recovering traditional stores. By the middle of 2014, Sonae had already opened 85 stores throughout Portugal and is currently generating over 20 million euros on an annual basis. ○

Open

ITALY - Milan

Open is a unique bookstore concept. A space where consumers can engage in a digital experience with books and tablets, and in collaborative experiences with others, co-working or at entertainment stations, while enjoying a gourmet bar.

Key data

- **Format:** Bookstore, gourmet bar and co-working
- **Opening:** 2013
- **Store Location:** Milan
- **Number of Stores:** 1
- **Number of Countries:** 1 (Italy)
- **Size of Store:** 1,000 sq.m.
- **Average weekly traffic:** 1,500 persons



Market opportunity

In Italy, the publishing industry is undergoing a major crisis as less and less people are buying books, magazines and newspapers. Yet those same people are reading more than ever, but in different ways and in different places. This led to an opportunity for a new bookstore concept; an open digital space based on sharing and cultural contamination.

Innovative Qualities

Open is first and foremost a bookstore, designed for people who like to read in a comfortable and relaxing environment. The space combines a homely atmosphere with innovative design elements, such as old fridges used as book racks.

It has a selection of more than 6,000



titles in categories such as cooking, design, sports, and childrens books. Readers of digital content have at their disposal 50 tablets and e-readers, with news and entertainment options, ranging from newspapers to apps, with the help of the 'digital bookstore assistant.' Clients can sit on sofas and armchairs or choose to read at the 20-meter long community table, which symbolizes the social and collaborative philosophy of the project, where they can also eat and play table games.

For collaborative projects, there is a dedicated area with complimentary wi-fi. In the small group area there are 40 stations with dedicated services and three meeting rooms, geared towards independent professionals, consultants



and start-ups. The rooms are used heavily for business presentations and workshops (about 60 events per month).

Finally, Open's services include a selection of food and drinks, reserving the central part of the relaxation area for the gourmet bar.

Conclusions

In the first few months, results at Open have exceeded expectations, with the food area producing the highest revenue. In the fall of 2014, Open will begin selling e-books and iPads, thanks to an agreement with Apple.

In light of these results, Open's partners are planning to open a series of new stores in Italy and abroad. ○

Profi Romania, Modular Store

ROMANIA

In a highly competitive grocery market, Profi Romania started to position itself as a true innovator in the retail market by continuously anticipating the market trends and consumer needs and expectations. Herein is just the chronicle of an already announced innovation: the first modular store in SE Europe.

Key data

- **Format:** Convenience
- **Year Opened:** 2014
- **Store Location:** Sighisoara, Baraolt (Transylvania region, Romania)
- **Number of Stores:** 2 (total PROFIL stores: 244)
- **Number of countries:** 1, Romania
- **Size of Store:** 300 – 500 sq.m
- **Product Mix:** food and non-food

Market opportunity

Recently the expansion battle field for the retailers in the Romanian market moved to the cities with less than 50,000 inhabitants where the retailers strive to find the best formats and the best price and product offering.

Since 2010 Profi adopted the “start and keep innovating” strategy for meeting and challenging the customers’ needs and requests. In a mostly price-driven battle field, innovation-driven development strategy can build a strong competitive advantage for any retailer and this is what Profi is aiming at.

Innovative Qualities

“Better, cheaper, closer” – this is the promise made by Profi to its customers. If the first two have already been accomplished, this new modular concept manages to seal this promise by coming as close as possible to the customer.

Based on a revolutionary technology, the modular store is able to go-live in around one month (vs. three months in the traditional way) and to expand or shrink the sales sq.m. depending on catchment area and demand. This becomes a cost-time-proximity effective way for the retailer’s expansion strategy. The retailer already proved the concept



flexibility by opening a 200-sales square meter convenience format and a 400-sales square meter supermarket format in two different cities.

The product range (5,000 SKU) at competitive prices is made of 20% Private label products’ and 80% products supplied by Local producers.

Conclusions

The innovation stays not only in the concept but starts with the development of a specific technology for building this modular format in a very short time (max. 1 week for the building and 2-3

weeks for arranging the refurbishments and stocking it) and also for the scalability of the format due to proximity market request:

- Total time to store opening: 3-4 weeks
- Scalability: ability to expand or shrink in size, according to the local market’s needs (traffic, conversion, purchasing power etc.)

Furthermore the major improvement of these two project dimensions contributes to the penetration of modern retail as to be at hand for each and every consumer (in areas that otherwise would be too costly to be reached). ○

SPAR University

THE NETHERLANDS - Amsterdam

SPAR University, a supermarket located nearby universities, is specifically targeted to students and faculty staff to shop for their daily and fresh groceries. The store design, merchandise mix, promotions and communication are adapted to the specific needs and interests of this group.

Key data

- **Format:** Student oriented supermarket
- **Year Opened:** 2013
- **Store Location:** Amsterdam, the Netherlands
- **Number of Stores:** 3
- **Number of countries:** 1 (The Netherlands)
- **Product Mix:** food and food-to-go



Market opportunity

Originally SPAR supermarkets have always been convenience stores aimed at the local neighborhood. Today this is visible through their City Stores and now also with their SPAR University supermarkets. The target group of students and faculty staff is able to visit a store that fits their every day needs and interests. This group is often looking for fast shopping, fresh products in small quantities at low prices, and the store and its assortment are completely adjusted to these needs. In this way SPAR is able to reach the local community and serve them better.

Innovative Qualities

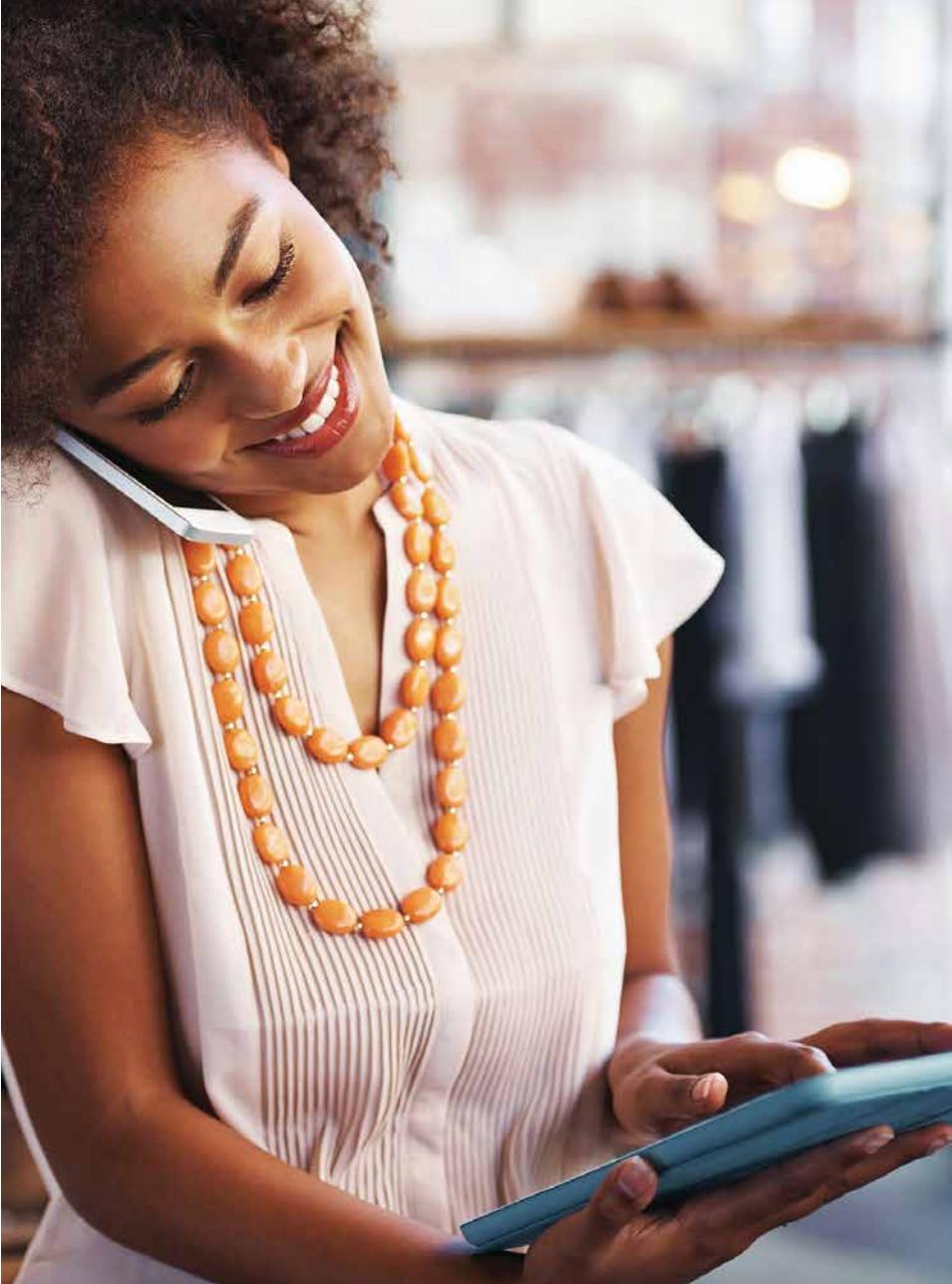
The assortment in the SPAR University stores contains a lot of fresh products,

juices, sandwiches and instant meals. To respond to any further product needs, visitors can choose which products should be adopted to or eliminated from the assortment at special points in the store. It is also possible to vote online and influence the price of specific products on the Facebook page 'CampusLife'. In this way, SPAR acknowledges the fact that this target group is very active online. And when shopping offline, students are often in a hurry and shop between lectures. So to answer the need of fast shopping, customers can pay through self-checkouts. Because staff is minimally needed at the checkout, it is possible for employees to focus on other aspects and be more service and sales oriented.



Conclusions

The first SPAR University was opened in Amsterdam, near the Vrije Universiteit (VU). Then the SPAR near the University of Utrecht was reopened as the new flagship store of SPAR University. This location was already functioning as a student oriented concept for years, but now incorporates the new look and feel of SPAR University. A third supermarket was opened in Rotterdam near the Erasmus University. ○



RETAIL TRENDS TECHNOLOGY INTERVENTION

Amazon Dash - Online

USA

The Dash, a new handheld grocery ordering device, allows AmazonFresh customers to order goods by scanning barcodes of groceries. In the absence of a barcode, a microphone and voice recognition technology allows users to speak and add to their shopping list. The device can be used anywhere in the home to refill and restock home essentials.

Key data

- **Format:** E-commerce
- **Year Opened:** Came to market in 2014
- **Store Location:** www.fresh.amazon.com/dash
- **Number of Stores:** NA
- **Number of countries:** 1 (only available in the US)
- **Product Mix:** Groceries



Market opportunity

Dash, a 15 cm long hand-held LED scanner, connects to a user's Wi-Fi network and works directly with a customer's AmazonFresh account. Users can say or scan items into Dash, and then view the list on a desktop or mobile device to finalize purchases and schedule delivery. Dash is viewed as an extension of the famous "1-Click" Amazon online shopping experience. The device is seen as another approach to Amazon's broader company goal of

giving its shoppers the quickest path to load a bunch of goods into their shopping cart no matter where they are. The online retailer is betting that when it comes to shopping, speed and convenience take precedence for customers.

Innovative Qualities

Dash's format and "1-click" like interface allows for faster scanning of more items, which will likely result in

more usage. The more customer who use Dash, more data is generated for Amazon to Analyze their customers, which could influence future usage as well as future product design. As an example, it is speculated that Amazon's new Fire Phone may eventually come with a dash scanner on the top of the phone and a button that's also "1-click" enabled. Shoppers would be able to utilize it in their homes or outside in the retail environment, leading to greater possibilities for usage.

Conclusions

It's unclear what Amazon's ultimate intentions are with Dash, though it appears styled partly as an alternative to mobile phone apps. The device is only available in select markets where Prime Fresh operates (San Francisco, Los Angeles and Seattle) and customers have to be invited to participate in the device's private trial. While it's unknown if Dash will expand for use with Amazon.com or in other markets, it's rumored that the company has plans to launch AmazonFresh in roughly 20 urban areas in 2014, including some outside of the United States. ○

ASOS Online

UK

Having recently made an impressive success of entering the Russian market, UK e-tailer ASOS has become something of a role model for British retailers through its in-depth understanding of consumer behavior and preferences.

Key data

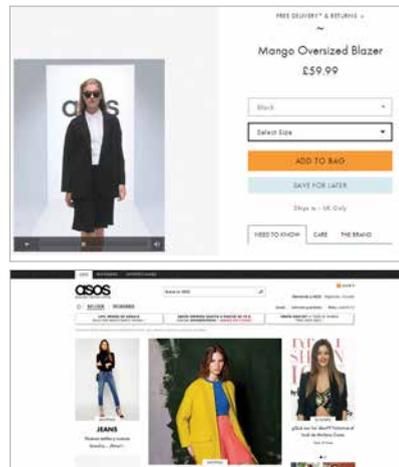
- **Format:** Website
- **Year Opened:** 2000
- **Number of Stores:** 9 local country websites
- **Number of countries:** 9: UK, USA, France, Germany, Italy, Spain, Australia, Russia, China
- **Product Mix:** Women's and Men's ready-to-wear fashion, accessories, and beauty

Market opportunity

In 2002, co-founders Nick Robertson and Quentin Griffiths recognized the relationship between celebrity endorsements and brands, leading them to set up the website AsSeenOnScreen – later shortened to ASOS. The website's initial aim was to copy items seen on celebrities, but has since burgeoned into more trend-led collections geared towards the mid-market. It is currently the UK's second largest online fashion retailer after Next, selling over 65,000 branded and private label product lines covering predominantly women's fashion, jewellery, and accessories, but with an increased focus on menswear of late.

Innovative Qualities

Arguably, ASOS's biggest reason for success is its digital platform, which has always been ahead of the curve. Its online retail experience spills onto its 9 localized websites, mobile apps, Facebook shop, social media, and Fashion Finder tool, making it accessible wherever the customer is, through any channel. Its pioneering social media strategy, from the tone of its Twitter



feed to its online marketing campaigns, gives the impression that the company is not trying too hard to sell product, but instead poses the business as a friend who likes sharing fashion trends and tips – showing an understanding of how younger people interact online.

Heavy investment in the website and its underpinning technology has been vital to ASOS's shopping experience, ensuring customers are offered as much value as can be obtained from visiting a physical store. Its delivery and returns policy is one of the most attractive in the market – free and efficient delivery with pre-paid returns that can be picked up by a courier.

Conclusions

ASOS's continuous work on creating a seamless journey between product design and a final sale, as well as having an ever-expanding range of products, has produced great achievements, with an expected £1bn worth of sales in 2014. Moreover, it plans to continue its global expansion, having already moved into China and Russia in late 2013, with plans to eventually move into South Korea, Japan, India and Brazil. ○

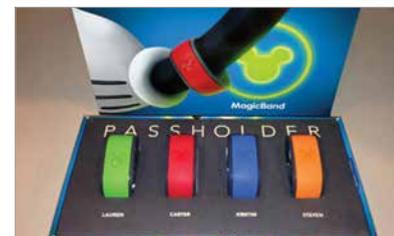
Disney MagicBand

USA - Florida

Disney has introduced the MagicBand electronic wristbands for all theme park adventurers, making it easy to store information including hotels, fast passes, meals and more. MagicBands are an all-in-one device which effortlessly connect you to all the vacation choices made with My Disney Experience. An online and mobile tool making it easy to dream, plan and share your vacation.

Key data

- **Format:** Electronic Wristband
- **Year Opened:** Available to all visitors April 2014
- **Number of countries:** 1 (US)
- **Product Mix:** MagicBand color options and other accessories for children including MagicBandits snap-on characters and MagicSliders band covers.



Market opportunity

The \$1 billion dollar system of electronic wristbands is shaping the future of travel. This model is an example of “seamless travel” and Disney creates a textbook case of how the travel industry is looking to innovate. MagicBands resemble a watch or bracelet allowing you to travel lighter throughout vacation; no one else in the travel industry has rolled out innovation of this caliber. All visitors who stay at Disney Resort Hotels will receive a band, while others can purchase one with their park ticket, encouraging travelers to stay within the park.

Innovative Qualities

MagicBands allow customers to travel lighter, and reduce the incidences of lost or stolen tickets. The colorful bands

connect to sensors located throughout the park, but can also be read by long-range readers to deliver a personalized experience and provide information to improve the experience at the Disney parks. Using Radio Frequency technology, the bands are always operational and allow for constant use. The My Disney Experience mobile app is used alongside the MagicBand to tie the entire experience together, giving travelers the ability to pre-plan their vacations by exploring travel options and booking them with the app. During their travels, customers can use the geo-linked app to pinpoint their location, and view schedules and times of nearby attractions in the park, access dinner reservations and FastPass tickets, as well as share travel plan with friends.

The band can also be used to open hotel doors and pay for products within the retail stores or meals.

Conclusions

Disney continues to deliver magical experiences to their customers and integrate the use of technology while doing so. Not only does the MagicBand create a fun way for kids to interact with the resort and rides, but also brings a whole new level of convenience and planning ease to parents. ○

eBay & Westfield Labs

USA - San Francisco

The next generation Store of the Future might be here. eBay Inc and Westfield Labs partnered with a select group of retailers to create a trio of digital and shoppable storefronts in the Westfield San Francisco Centre mall.

Key data

- **Format:** Shoppable Window
- **Year Opened:** 2013
- **Store Location:** Westfield Mall, San Francisco
- **Number of Stores:** 1
- **Number of countries:** 1 (US)
- **Product Mix:** Handbags, Footwear, Accessories, Consumer Electronics



Market opportunity

The Digital Storefronts focus on three high profile brands including Rebecca Minkoff, Sony and TOMS. The concept integrates shopping, digital and mobile payments all under one roof. This new experience is enticing to customers and creates a way to get brand publicity and customer interaction without a physical store; eBay, Westfield and PayPal receive a mutual benefit from the digital screens. The large interactive shopping screens may help retailers better utilize existing space previously leased from mall operators. The strategy is to take advantage of mall goers who are already in the shopping/buying mindset while intrigued to try something new.

Innovative Qualities

Shoppers can simply walk up to a

window, touch the glass and navigate through products as if they were on a computer. From there, they can buy curated merchandise from each brand, pay with PayPal, and arrange for free home delivery or pickup within the mall for select items. The digital storefronts create the perfect merger between online shopping and the physical browsing experience.

Conclusions

eBay and Westfield's partnership is just another example of how retailers are working to blend the online/offline experience and remain relevant in the industry. Other brands have begun to follow suit with digital vending machines and shoppable windows alike to recreate the shopper's experience. ○



Gesaky Interactive Mirror

IRELAND

Gesaky Interactive is committed to helping fashion retailers increase customer conversion and average ticket. Through interactive mirrors, the company enables customers to compare styles, select comparisons and share information within the store, all while the retailer gathers invaluable analytics from the in-store customer activity.

Key data

- **Format:** Interactive Mirrors and Data Analytics solution
- **Year Opened:** 2011
- **Location:** Dublin, London, New York, Sydney, Porto
- **Number of countries:** Globally through a network of partners



Market opportunity

Using a combination of RFID, NFC and image recognition software, Gesaky can utilize every Mirror in the retailer's stores to help their customers make more informed decisions on all of their purchases. Every item in the store is part of a collection, so every time a customer selects an item and brings it to the Mirror, they can see multiple matches and options for other complementary garments. The customer can also share this on Facebook and other social media platforms, which drives awareness of the retailer across multiple platforms. Most importantly, every interaction with the customer delivers valuable information to the retailer directly from the floor.

Innovative Qualities

Every fashion retailer needs to understand their customer. In order to do this, it is not enough to only derive analytics from sales, but also to derive analytics from "what didn't sell". Gesaky Interactive has filled this gap by designing a comprehensive analytical tool behind their popular Interactive Mirror. This tool increases the conversion rate and average spend in every store, while the Social Media component has also been directly linked to an increase in foot traffic at the store. Beyond the store, the Interactive Mirror also analyzes geographical trends and allows the retailer to decide where certain items should be stocked. The Mirror also makes it possible for smaller stores to sell items not normally stocked



by suggesting the items, and then delivering to the customer's home or to the store for next day pickup.

Conclusions

The Gesaky Interactive Mirror not only acts as an additional salesperson on the shop floor, but provides valuable information back to the retailer on a streamed basis. This information lets the retailer fully understand in real time what customers "like" and "dislike", not only in one specific store, but nationwide and globally. ○

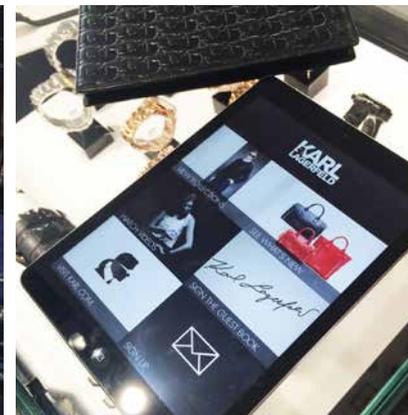
Karl Lagerfeld

UK - London

Far from the luxury fashion houses such as Chanel and Fendi that are associated with German designer Karl Lagerfeld, his own label takes on a more light-hearted approach to fashion, embodying everything and anything to do with the fashion legend himself.

Key data

- **Format:** Flagship store
- **Year Opened:** 2014
- **Store Location:** London, UK
- **Number of Stores:** 15
- **Number of countries:** 9: UK, Switzerland, The Netherlands, Belgium, France, Germany, Turkey, Russia, China
- **Size of Store:** 251 sq.m.
- **Product Mix:** Men's and women's ready-to-wear, accessories, gifts



Market opportunity

Launching on the prestigious Regent Street was an ideal opportunity for the Karl Lagerfeld brand to reach approximately 70 million locals and tourists visiting one of London's top shopping and lifestyle destinations. The latest addition to an international rollout of Karl Lagerfeld stores that have already opened in cities including Paris, Antwerp, Munich, Shanghai and Beijing, the 2014 concept store combines the brand's aspirational, accessible men's and women's ready-to-wear collections with cutting edge modern technology.

Innovative Qualities

The store's sleek, shiny, monochromatic interior is instantly synonymous with the designer's black tailoring, immaculate white ponytail and black shades, but also combines a contemporary feel with classic store design elements – arguably more impressive than the product itself. Stock is creatively lined along lighted, mirrored walls adjacent to mantelpieces decorated with stuffed Karl dolls and hand-drawn portraits. Technology is a key aspect of the shopping experience, with iPad minis integrated into display racks to allow

online browsing of the latest collections. Dressing rooms also contain wall-mounted iPads where shoppers can take pictures of themselves, add image filters and share via social media or email – it's all about generation #selfie. Furthermore, Karl's digital guestbook allows shoppers to take snaps of favorite items or leave the designer personal notes, from which he tweets his favorites.

Conclusions

From the skinny blazers and designer trainers to the novelty collectible figurines more aimed at the tourist trade, the store caters to the millions of Karl-crazed fans eager to have a piece of the man himself. ○

Sport Check-West Edmonton Mall Flagship Store

CANADA

The rise of ecommerce is causing retailers to push the boundaries of in-store experiences and provide next-level customer service. As a result, Sport Chek opened its first flagship store that offers a tremendous, digitally immersive retail experience.

With more than 180 stores nationwide, Sport Chek is Canada's #1 sporting goods retailer.

Key data

- **Format:** Bricks-and-mortar flagship store
- **Year Opened:** 2014
- **Store Location:** Edmonton, Alberta, Canada
- **Number of Stores:** One flagship store, one Retail Lab, 185 Sport Chek stores in total
- **Number of countries:** 1, Canada
- **Size of Store:** 7,150 sq.m.
- **Product Mix:** Sporting equipment, footwear and apparel
- **Store video:** www.sportchek.ca



Market opportunity

Building from the success of the brands 'Retail Lab' store in Toronto, the Edmonton, Alberta flagship store represents the second phase in Sport Chek's journey in dominating the future of retail.

The flagship store redefines the customer experience through industry-leading digital elements, expert advisors and a suite of in-store services that educate and inspire. The store elevates Sport Chek's mission to 'Inspire Canadians to Live Healthy, Active Lifestyles' by creating a dynamic environment through unique brand partnerships that connect sport and lifestyle enthusiasts to the best sport brands in the world.

Innovative Qualities

The store features a multi-channel strategy providing custom information

in an informative, accessible manner by utilizing 400+ channels. Products, visuals, and interactive community walls personify the brand values of Sport Chek and its vendors.

Key features include:

- NFC-enabled screens
- 470 individual screens
- 80 tablets
- 20 large-format touch screens
- 80 channel custom sound system
- Interactive putting green
- Virtual footwear wall
- Custom community app
- Activity-based kiosks
- Climbing Treadmill

The West Edmonton Sport Chek flagship store has a 30% average transaction value, much greater than the banner average. The flagship store



also offers 40% more square feet of retail space compared to the two FGL Sports properties previously opened at West Edmonton Mall.

Conclusions

While other retailers may incorporate digital elements, in-store test features, and/or highly specialized product selections independently, the Sport Chek flagship store at West Edmonton Mall leads the marketplace.

As part of the forward-thinking retail strategy, Sport Chek anticipates opening 10-12 flagship stores nationwide in the next five years. ○

teamLabHanger

JAPAN

An interactive clothing hanger where items are linked by a sensor installed inside the hanger, which is then triggered by a customer's interest in the product.



Market opportunity

teamLab has gone where no other design firm has before, with the new and innovative retail solution featuring virtual high-tech mannequins. The company has developed a way to engage and educate customers while creating a new way for shoppers to explore products.

Innovative Qualities

teamLab created the interactive hanger where items are linked by a sensor that is installed inside the hanger, which is activated once a customer picks up the product/hanger and then sent to a virtual mannequin. Once activated, the hanger displays coordinated images

and videos of the piece on monitors throughout the store. The virtual hanger brings product knowledge and technology straight to the consumer's eyes, with the subconscious movement of wanting to know and learn more about the item. The interactive hanger makes the action of taking an item by hand more enjoyable. teamLabHanger provides not only item information, but additional product/brand information and sound as well. teamLab was implemented at popular retailers including Vanquish (inside 109MEN's department store), earth music & ecology, Coordi Nation, Frapbois, and Reebok.

Conclusions

teamLab is one of the first companies to experiment with yet another way to implement technology into the retail space. As investment continues, more and more retailers are hoping to adapt this technology to extend the experience for their customers. The teamLab portfolio extends beyond the innovative hanger including the teamLabBall and equipment to graphically display information from multiple sources at the same time in a single location, and plans to continue to develop further innovations. ○

Key data

- **Format:** Virtual hanger
- **Year Opened:** 2011
- **Number of Stores:** 5
- **Number of countries:** 1 - Japan
- **Product Mix:** Apparel, Footwear

viPOS - RAG Shopping Wall

AUSTRIA

The company Umdasch Shopfitting created the viPOS virtual shopping wall, blending online and offline commerce leading to an enhanced customer experience. The viPOS shopping wall brings cross-channel shoppers into the store and integrates the traditional POS.



technology to provide corresponding product information from recognized articles. This interactive wall spans 4 x 2 meters and consists of 14 full-HD displays. viPOS is malleable, offering a tailor made solution for each retailer with options for wall adjustments to address different target groups.

Market opportunity

Numerous new retail concepts continue to emerge in order to satisfy the changing customers' needs and expectations. A successful example is the pilot project of Umdasch Shopfitting GmbH, Ars Electronica Solutions and Samsung Austria. Together they developed the viPOS. The shopping wall is versatile; acts as a virtual catalogue, a digital shopping bag, a personal shopper advisor, as well as a platform to interact on social media. The viPOS was successfully tested in the street wear label store RAG in Vienna and is continually expanding to other retailers.

Innovative Qualities

At first glance, customers see a large digital advertising surface, however the viPOS, is more than ordinary with a large multifunctional touch screen that can be simultaneously operated by two customers.

The viPOS not only shows the shoppers where each item is located within the store (and entire product range), but also enables customers to put the items into the virtual shopping cart for direct online order; the shopping cart can also be transferred to a mobile device via QR-code. To enhance the quality of product advice, viPOS uses RFID

Conclusions

A shift from the point of sale to a point of integrated experience and convenience is the main objective of the viPOS system. Customers can co-create their path to purchase according to their wishes and needs with the use of diverse touchpoints with the delete benefits of both the on-and offline world. The shopping wall offers an innovative shopping experience which increases customers' loyalty and refocuses on brick-and-mortar trade adding both exciting and digital elements. ○

Key data

- **Format:** Interactive shopping wall
- **Year Opened:** 2013
- **Size of solution:** 8 sq.m.

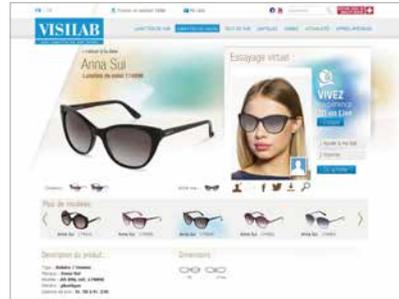
Visilab SA

SWITZERLAND

Visilab developed an online shopping experience where the customers can try on glasses virtually from home. The technology shows the glasses directly on your uploaded photo or even live on you with the help of a webcam.

Key data

- **Format:** Eyewear
- **Store Location:** Switzerland
- **Number of stores:** 66
- **Number of countries:** Switzerland
- **Size of Store:** average of 147 sq.m.
- **Product Mix:** Glasses, sunglasses and contact lenses



Market opportunity

Visilab SA is the Swiss market leader in ophthalmic products and specializes in tailored, fast and high-quality solutions for visual-weaknesses. With their new online tool, customers have the possibility to virtually try on different glasses on their computer. Customers can either upload a photo of themselves or use a webcam. The Visilab-tool analyses the photo/the webcam picture and automatically integrates the glasses chosen by the customer. If the customer uses the webcam, he can even move his head and the glasses will move with the face. This enjoyable way of shopping can lead the customer to try on different models at their own pace. In parallel, this is a chance for the retailer, as the customer demands less time for advisory and the sale can be achieved quicker.



Innovative Qualities

The Swiss market leader became famous with the promise to produce glasses in only one hour. With this new innovation, Visilab developed a technology which is simple to use and offers a convenient service to the clients. This innovation gives them the possibility to choose the glasses whenever they want, and they can test the various models available virtually on their face. With this preparation, the time of the purchase process will decrease because the customer already has a good idea of what he wants when he enters the shop. Maybe the customer



suddenly likes two glasses and will buy them both, because he could see on his computer that they both fit him very well.

Conclusions

This innovation revolutionizes online eyeglass shopping. The customer can "try on" all the different glasses and even see how it actually looks. This software can be used for all 66 stores in Switzerland. On the website the customer can directly make an appointment to try on the wanted glasses in reality, and pick them up. ○

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Ebeltoft Group
International Retail Experts

Tracking Retail Innovation trends around the world...

“Innovation distinguishes between a leader and a follower.” (Steve Jobs)

A decade ago, Ebeltoft Group published its first book on Retail Innovation.

Early on in the development of Retail Innovations, we were less broad in our definition of what ‘Retail Innovation’ truly means. We focused heavily on traditional brick and mortar retail, and it wasn’t until our second book where we featured our first case involving e-commerce. As we watched this trend evolve with the rapid growth and influence of e-commerce, we continued to highlight new retailers who have joined the game. Along the way, we have highlighted trends that have taken deep root in defining what modern retailing means today: the evolution of convenience retail, manufacturers selling direct, the rise of fast fashion, and of course, the ongoing impact of e-commerce.

Success at retail in the future will require retailers to cultivate a multitude of skills; delivering a customer experience while seamlessly blending an omnichannel experience together for the consumer.

Retail Innovations 10 highlights individual ideas and the key themes that emerge from studying the whole. This year, we evaluated over 120 cases from around the world, identifying the 7 global innovation trends and 60 of the best innovation cases from 21 countries. The cases feature a unique mix of innovations from different parts of the world and clearly demonstrate the diverse aspects of innovation occurring globally, as well as the remarkable emergence of consistent themes that play out on a global basis.

Retail Innovation Trends

- Curated Collections
- Customization
- Experiential Retailing 2.0
- Hyper Local
- Online Offline Mashup
- Retailvention
- Technology Intervention



Ebeltoft Group

International Retail Experts

We are a Global Alliance of retail consulting companies with member companies in over 20 mature and emerging retail markets.

Since 1990 we have helped retailers as well as suppliers to the retail sector remain competitive and achieve their goals by blending global retail expertise with the member’s local insight. Ebeltoft Group serves 36 of the top 100 retailers and 29 of the top 50 manufacturers worldwide.

Ebeltoft Group’s global studies and publications include: Global Cross Channel Report (2014); Retail Internationalization (2013); Global Cross Channel Report (2012); NeoConsumer (2011); The Trust Factor (2011); Environmental Sustainability (2010).

For a personal presentation of the Retail Innovations trends and cases or information about our latest global publications and research, please contact Ebeltoft Group or visit our website for further information on our services.