



Meeting the needs of a multichannel shopper

Matt Piner - Conlumino

Agenda

Today's sections



The
backdrop



Rise of
multichannel



Retailers'
response



Final
conclusions



The backdrop

The backdrop

Weak economic growth

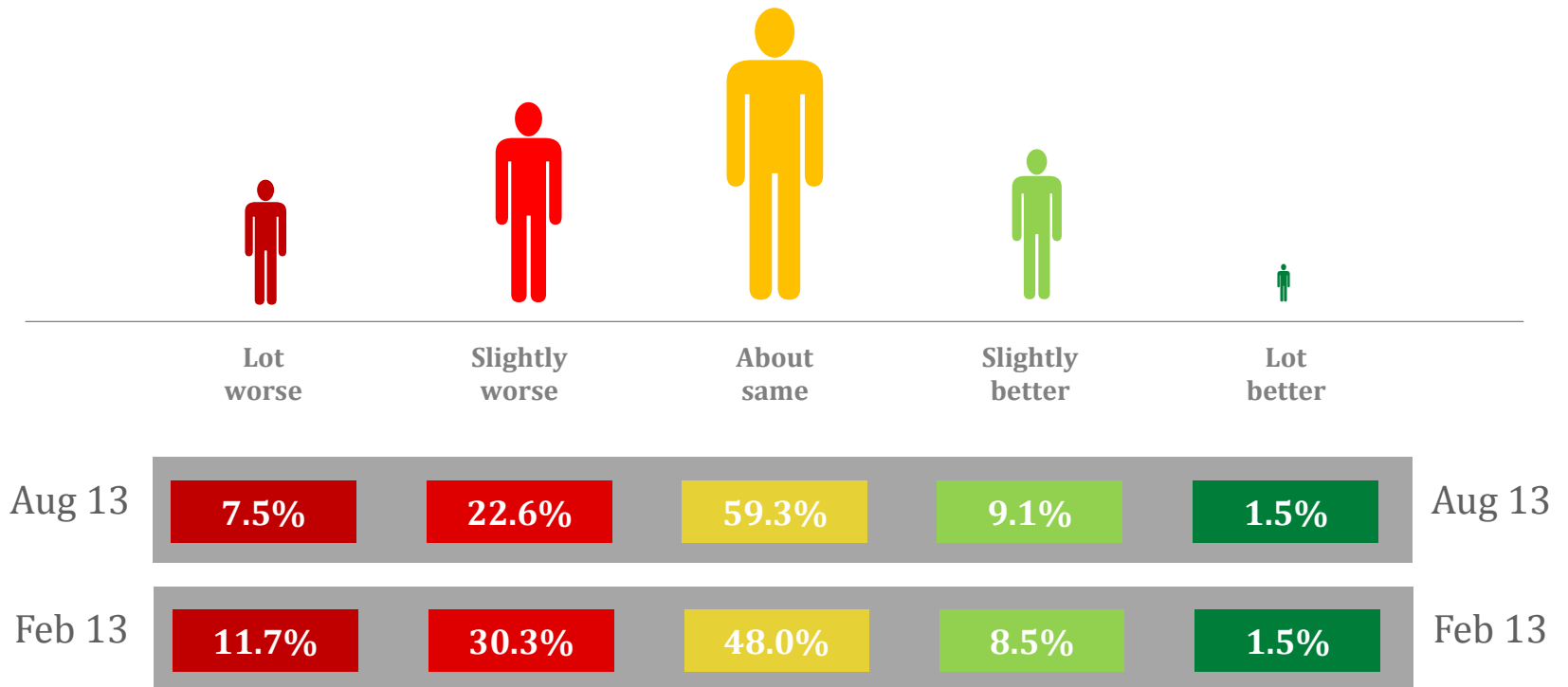
GDP growth patterns, year-on-year change (%)



The backdrop

The consumer view

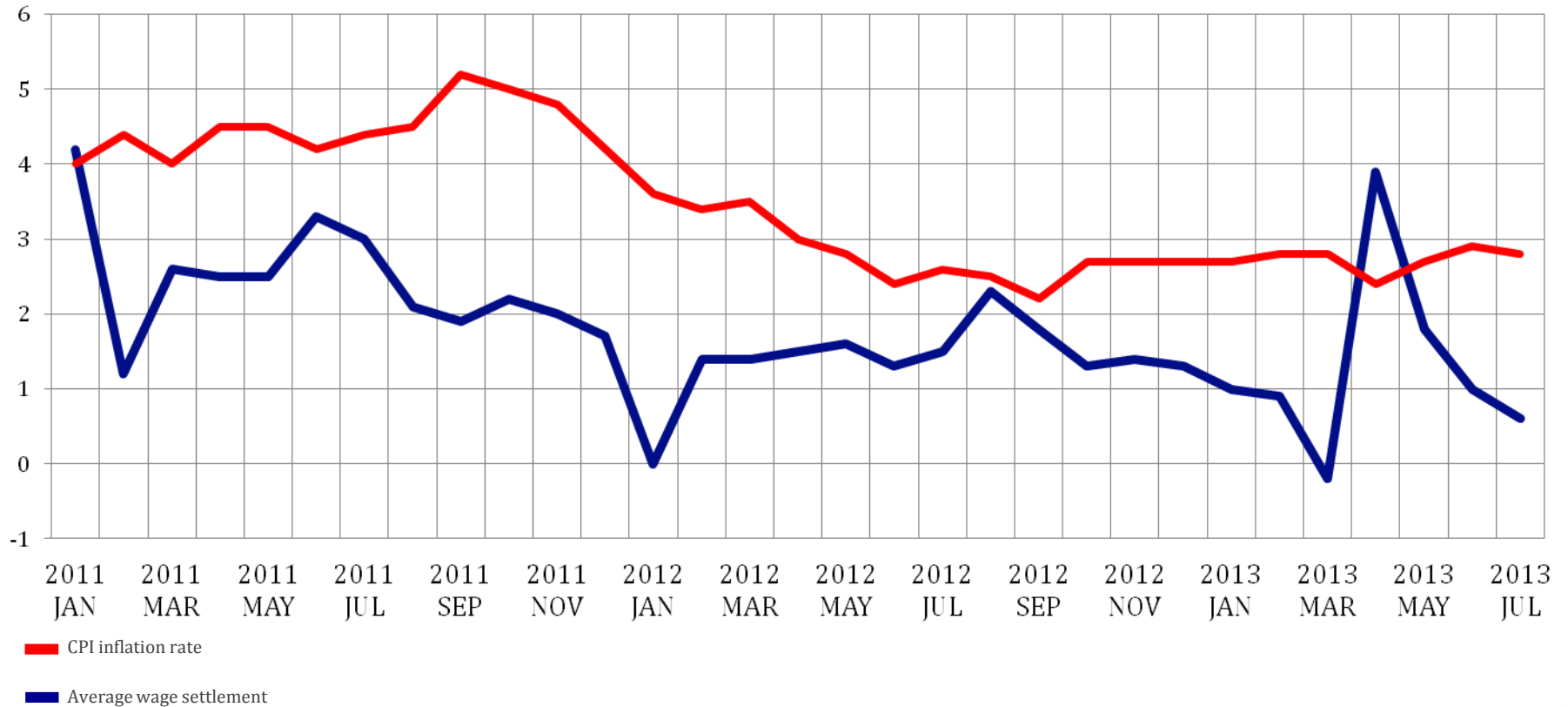
How do you expect your own personal finances to change over the next 6 months?



The backdrop

Less disposable income

Wages versus inflation



The backdrop

Complex consumer reactions

I am thinking much more about
what I'm buying

72.2%

I am looking for quality products that
will last me out

55.3%

I will pay more for something that's
right for me

41.1%

I am buying cheaper options where
they are available

37.9%

I am buying fewer luxury items such as
clothing

34.3%

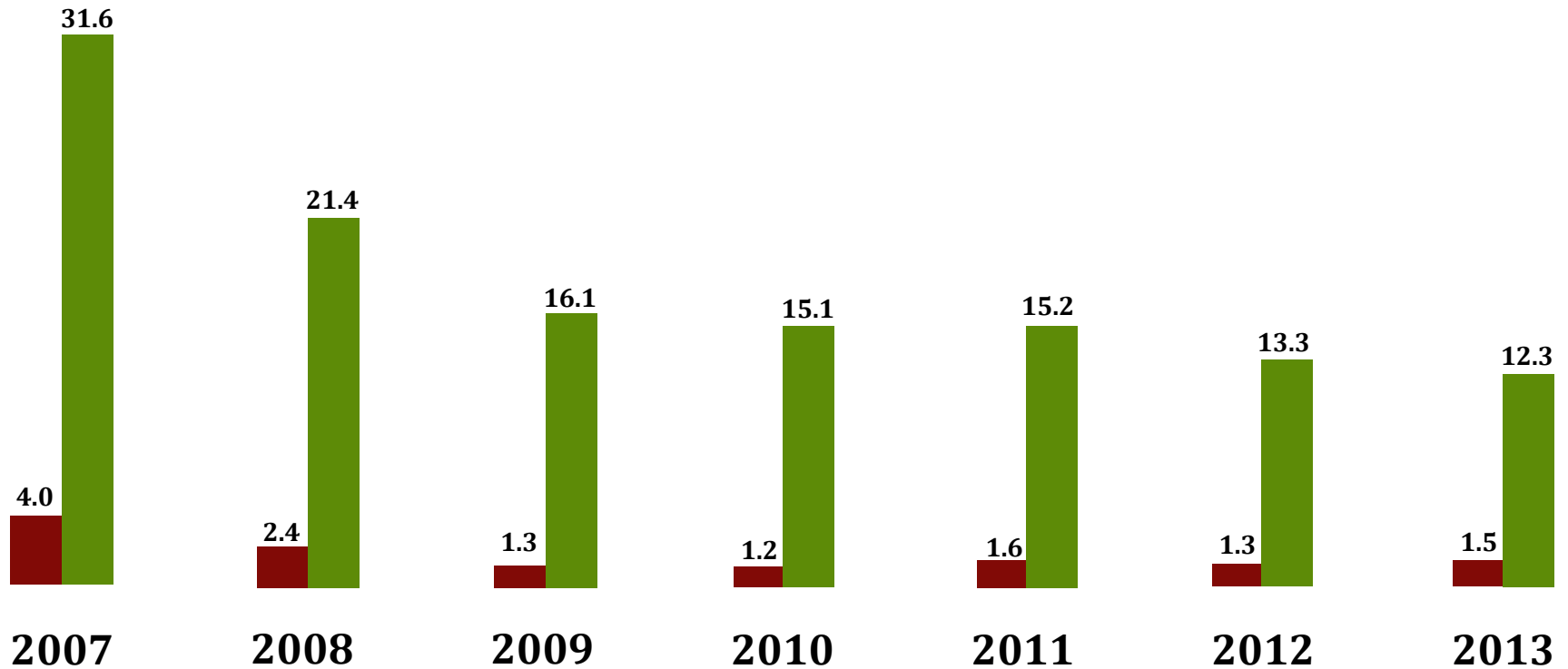


Rise of multichannel

Rise of multichannel

Online driving overall growth

Total retail consumer expenditure growth (%)



Rise of multichannel

Main reasons for shopping online

Cheaper	75.3%
More choice	30.6%
Can shop at any time	24.9%
Saves time	24.8%
Access to retailers not near me	13.9%

The multichannel shopper

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Rise of multichannel Shopping around

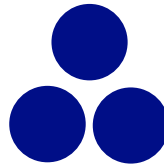
The number of channels used during clothing shopping



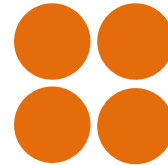
one



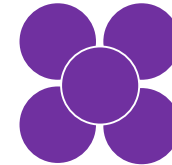
two



three



four



five+

2012

9.3%

41.8%

38.3%

7.2%

3.4%

2012

2002

17.9%

68.4%

9.8%

3.9%

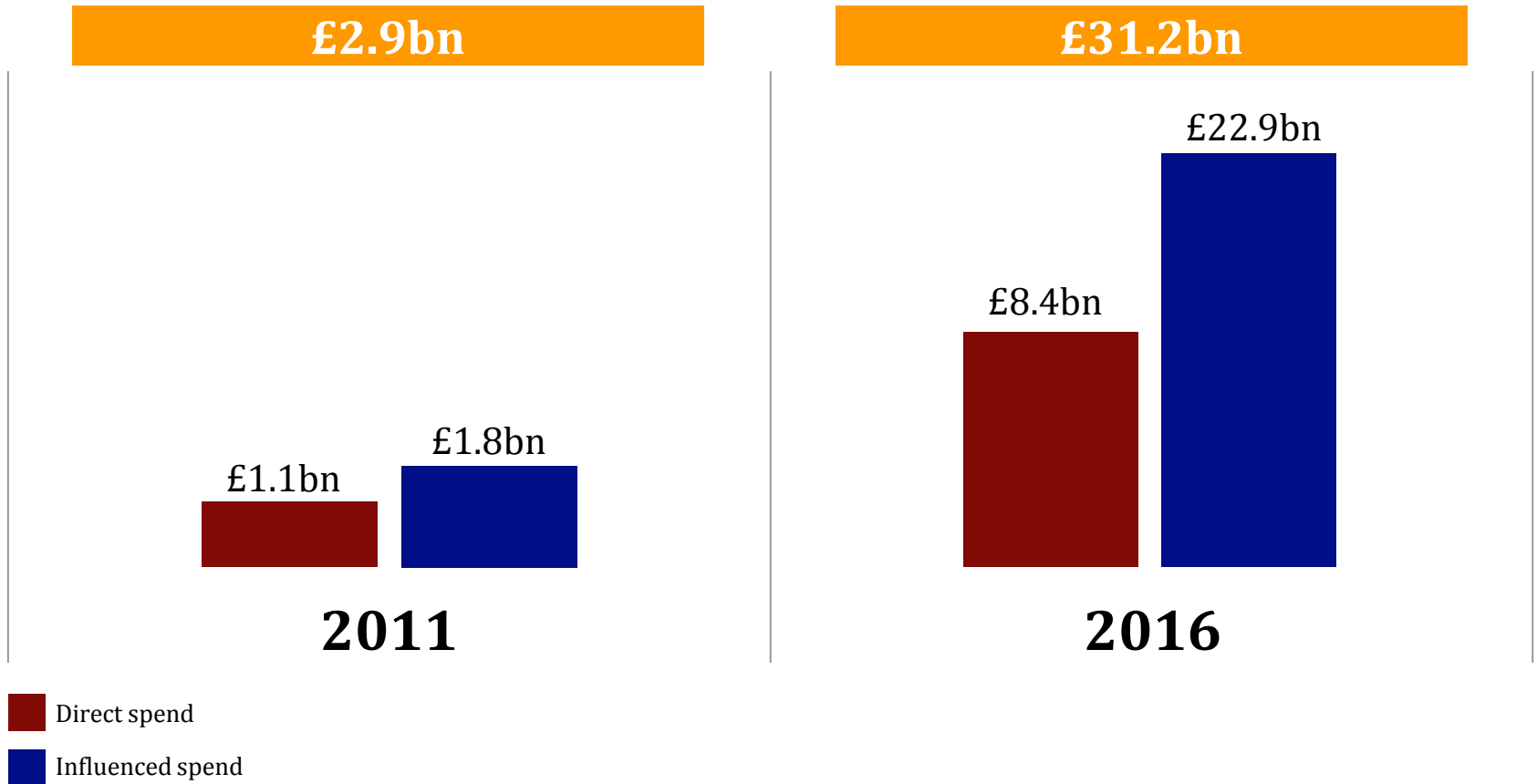
0.0%

2002

Rise of multichannel

Mobile to see huge growth from low base

Value of mobile spend

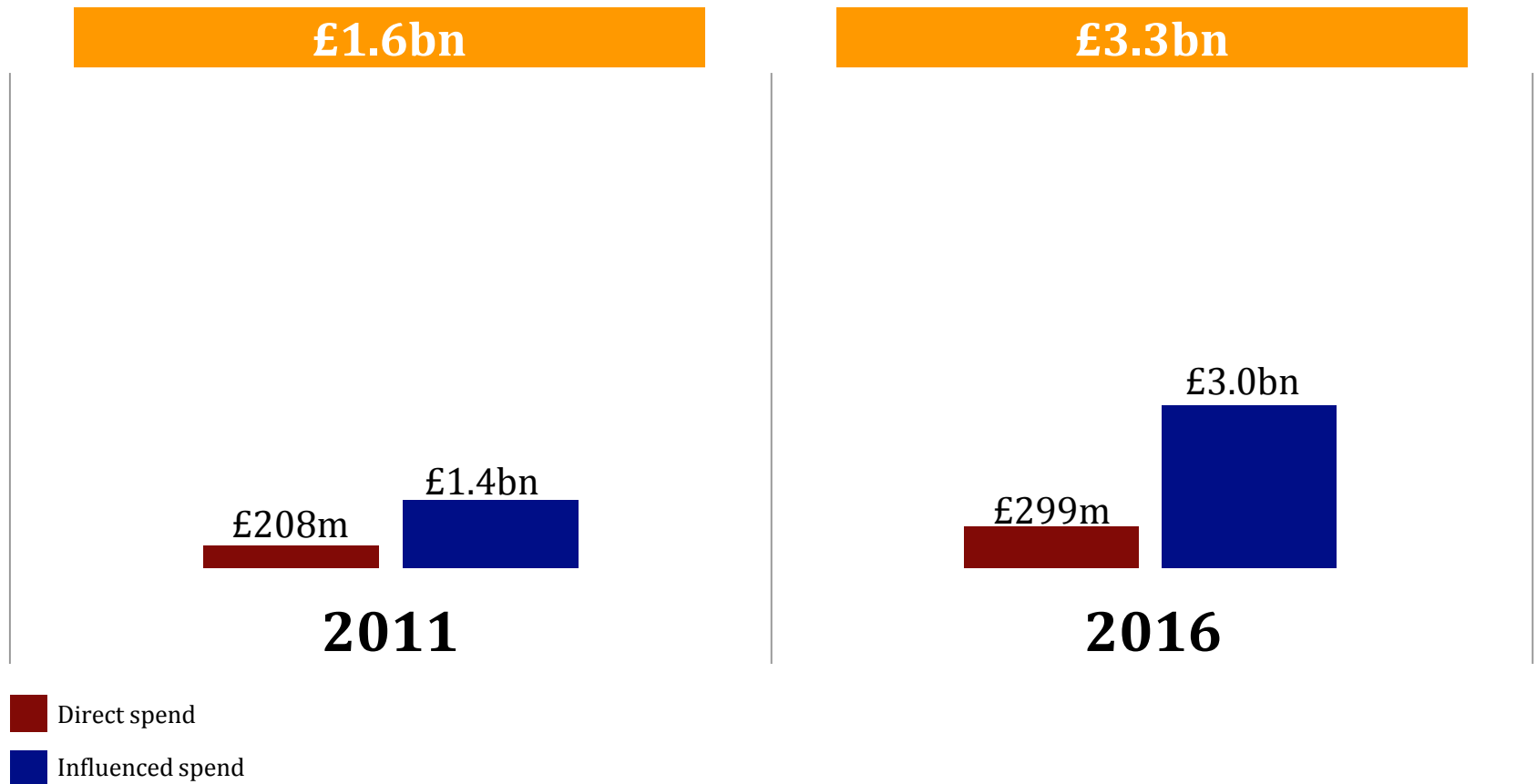


Direct spend
Influenced spend

Rise of multichannel

Social media – impact less direct

Value of social media spend



Rise of multichannel

Stores – still the main channel

Changes in fashion store numbers



Store numbers



Store space (sq ft)

2011

53,875

111,654k

90.3%

2015

49,971

105,009k

85.4%



Retailers' response

Retailer's response

Developing the different channels



Online

Becoming more important and influential

RESEARCH



PURCHASING



Stores

Driving less revenue but still crucial touchpoint

PURCHASING



INSPIRE/FULFIL



Mobile

Relatively small, but rocketing up

(embryonic)



RESEARCH



Social media

Having more and more of an (indirect) influence

(embryonic)



INFLUENCING

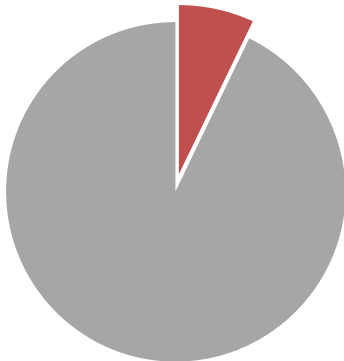
Retailer's response

Online – more transactional

Proportion of retail spend made through the internet

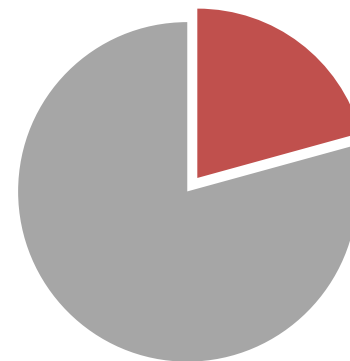
2010

8.2% of all retail spend



2020

20.4% of all retail spend



The multichannel shopper

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Retailer's response

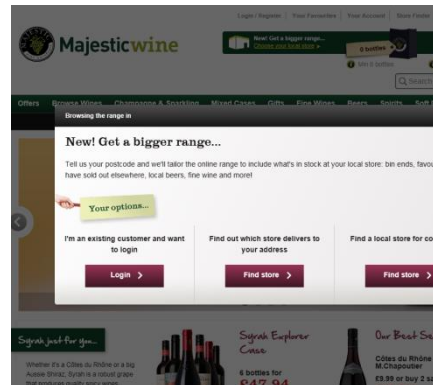
Online – more personalised

Personalisation becomes mainstream



M&M's:

Putting your face on chocolate



Majestic wine:

Localised ranges and improved recommendations



Threadless:

Turning customers into product designers

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Retailer's response

Stores become 'multichannel' - collection



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Retailer's response

Stores become 'multichannel' - inspiring



Retailer's response

Mobile creates a 'digital footprint'

Growth of mobile spend by location to 2013.

+92%



While at home

+111%



While at work

+120%



General travel outside home

+125%



While commuting

+144%



While out & about

+202%



On the high street

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Retailer's response

Mobile creates a 'digital footprint'

●●○○ 3G 17:32 62%

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... available to ship to your location. Please click here to **purchase a Kindle Fire** tablet from Amazon.com.

●●○○ 3G 17:33 61%

techradar.com

Asus Fonepad

30th Apr 2013 | 16:21

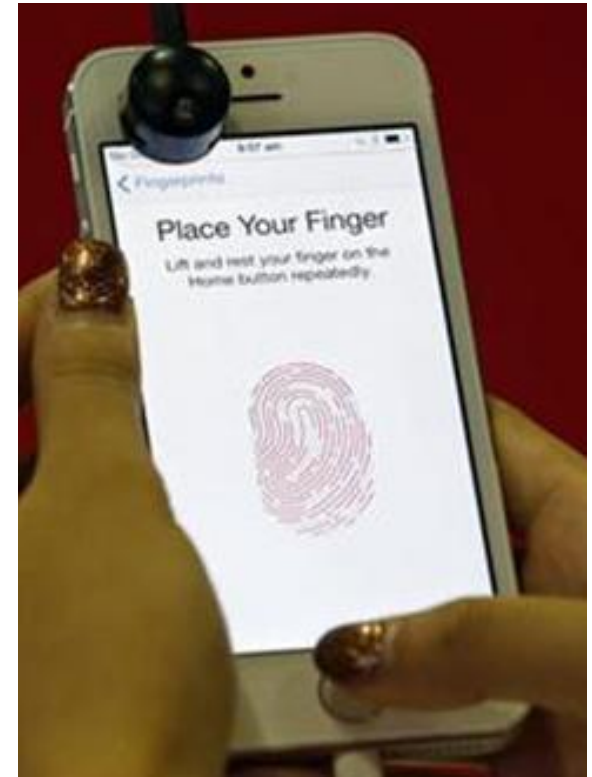
Asus flexes its hybrid muscle once again with a 7-inch tablet that makes calls

TechRadar rating:
★★★★☆

Like:
Great LED-backlit screen; microSD storage; Premium metal chassis; Good battery life;

Dislike:
No rear camera; Poor speakers; Nexus 7 cheaper; Impractical for calls;

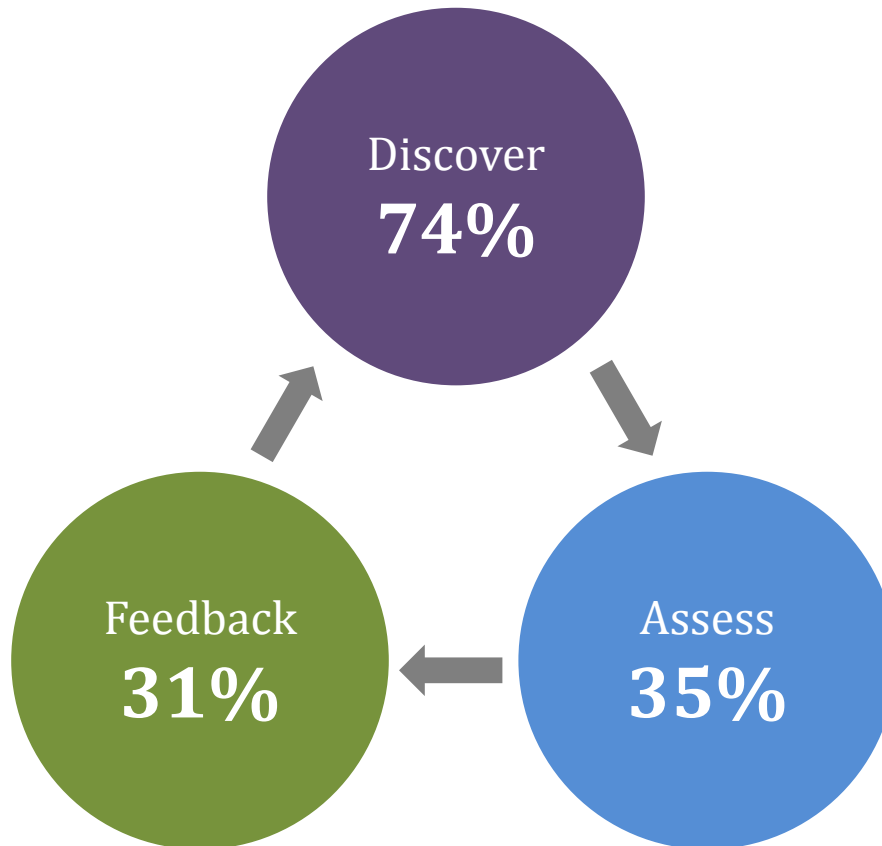
Introduction



Retailer's response

Social media for engaging with consumers

The feedback loop



The multichannel shopper

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Retailer's response

Amazon uses social media to engage

171 of 180 people found the following review helpful

★★★★★ UE32F5000 11 April 2013

By Andy72 TOP 1000 REVIEWER

Size Name: 32 inch

This is the new and improved version of the EH5000. I have never seen the old model in action but the F5000 is supposed specification, apart from this the technical specs are the same. I chose the new and more expensive model because of the I model with a narrow bezel (the EH5000 is chunky at just 2 cm thinner than my 8 yrs old LCD TV) and because I change TV sense to buy the latest available model. One word of caution: do not buy this model because of the Ethernet port as this is software updates; this TV is not DLNA compliant. Not an issue for me as I think Smart TV's are 90% marketing and 10% fun TV box or a media player will give you a REAL smart TV for an extra 60€.

Back to the TV: coming from an 8yrs old LCD 26" TV I have to say that the F5000 gives an amazing viewing experience. It's OMG! I loaded Avatar on dvd and the image blew me away! I cannot comment on audio as I use an external theater system Fantastic TV, if anything I regret not getting the 37" but wife wouldn't want to hear about it!

In a nutshell, this is the 2013 update on the EH5000 (now discontinued) with better video specs, slim design and a narrow b only. Image quality is outstanding, looks good in the living room, discrete and non-invasive! Recommended.

2 Comments | Was this review helpful to you? Yes No

71 of 76 people found the following review helpful

★★★★★ Reasons for buying and reasons for being delighted (UPDATED WITH SCART INFO) 29 July 2013

By Dave M TOP 100 REVIEWER VINE VOICE

Size Name: 42 inch | Amazon Verified Purchase

First of all, why did I buy this particular television and not one of the many others in this size / price range?

There are several reasons:

- the reviews about quality were very positive
- I have seen 3D and it wasn't a feature that I particularly wanted (do I really want to wear glasses over my glasses?)
- I didn't want a "Smart" television as I have a PC permanently connected. Lenovo VE74AUK Q190 Ultra Sma B887 1.5GHz Processor, 4GB RAM, 500GB HDD, LAN, WLAN, Integrated Graphics, Windows 8), a really ex can be updated as time goes on, whereas the Smart function is going to get more and more out of date as I

Sell Help

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Home Cinema Media Streaming Hi-Fi & Home Audio Accessories

Samsung UE32F5000 32-inch Widescreen 1080p Full HD LED TV with Freeview HD (New for 2013)

by Samsung
Size Name: 32 inch

Price: £249.00 & this item Delivered FREE in the UK with Super Saver Delivery. See details and conditions

In stock.
Dispatched from and sold by Amazon.

Want it by 1pm tomorrow, 28 Sept.? Order it within 50 mins and choose Express Delivery at checkout. Details

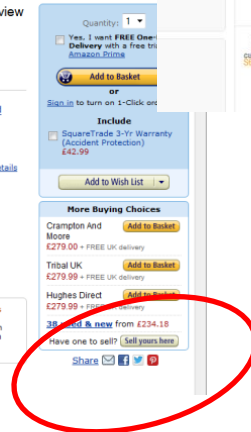
- Enjoy amazingly vivid and realistic Full HD entertainment
- See more amazing colours with Wide Colour Enhancer Plus
- Access your photos, movies and music on USB storage
- Access 4 HD channels through Freeview HD

See more product details

35 new from £240.99 2 used from £234.18 1 refurbished from £299.99



Buy this TV and get £30 off Samsung HW-F550 46-inch 310w Soundbar with Wireless Sub Woofer.
Buy this TV from our promotion and get £30 off Samsung HW-F550 46-inch 310w Soundbar with Wireless Sub Woofer. The discount will be applied when both products are bought together from Amazon.co.uk. Offer valid till September 30th 2013, 23:59. Click here for more information.





Final Conclusions

Final Conclusions

Meeting a multichannel shopper's needs

Stagnant environment

Complex consumer

Online

Stores

Mobile

Social media



Multichannel a 'growth pocket'

Empowered by multichannel

Increasingly personalised

Fulfil and inspire

Track the shopper

Engage



Thanks for listening!

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