

A woman with long brown hair, wearing a tan jacket over a black top, is looking down at a red garment hanging on a rack. In the background, a mannequin wearing a blue dress is visible, and the store has bright, modern lighting.

NOVAMETRIE
ETUDES MARKETING - SONDAGES D'OPINION

WHITE BOOK

October 2013

In partnership with
FUJITSU

The future of the STORE within a multichannel environment

*Turning today's challenges
into tomorrow's successes
through operational efficiency
and better customer experience*



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Richard Clarke

*Vice President, Business Development
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EDITORIAL

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His role is to develop and execute a compelling and relevant retail strategy for market development, new solutions and services and strategic customer acquisition and growth.

Richard is also responsible for global sales enablement, including business consulting, global partner alliances, retail analyst relations and the development of new channels to market.

Richard has worked in the retail industry for 25 years in senior roles across industry, consulting and technology. Before joining Fujitsu in 2007 he was a consultant in the retail practices of Accenture and KPMG and was a manager for the leading UK bookseller, stationer and newsagent, WH Smith.

Richard has co-authored publications on retail issues, including omni-channel retailing and customer loyalty. He has been a speaker at conferences including Retail Week in the UK and similar events in the US and China.

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Stores 'are a changing' – to borrow from a famous folk poet - is one way of describing the transformation which is taking pace across European and indeed global store networks. Geo-marketing techniques for example in the UK are estimating that a multiple specialty retailer needs to be represented in only c.100 locations to capture its maximum market share. Combine this with the disruptive and cannibalising effect of web shops and mobile shopping services and it is clear that the old dictum about retail stores of 'build it and they shall come' no longer applies. Stores need a revised purpose in the retail mix but it is not always clear what this should be and how it should be delivered.

There is no time to wait. Pure play internet retailers are not only stealing bricks and mortar sales but are building physical networks in the shape of traditional stores or logistics hubs in high traffic locations to create a real world engagement with the customer. If anything however this trend gives renewed strategic direction for stores – it is the physical, human and geo-convenient nature of stores which differentiates their role in the customer journey and will help to ensure they complement the overall engagement with the customer.

What our retailer customers are telling us and we are observing globally is that stores are no longer standalone 'stockists' or 'outlets' but are an integrated stage in the shopping process – browse and fitting points, order taking and collection hubs, service points. In the months and years ahead we will certainly see more models emerging reflected in store design and format development – for example more space for collection, more space for try before you buy.

01

This new survey from Fujitsu of pan European retailers make it clear that repositioning and resizing their store networks is a critical priority for most retailers. At the same time the survey reveals that alongside store remodelling retailers continue to focus on the two sided coin of retailing – enhancing the customer experience and driving greater efficiency and productivity. Other issues – such as responsible retailing, personalised services, how to engage with social media – also feature as important factors shaping retailing in the future.

At Fujitsu we talk of ‘retailing without walls’ – a fundamental shift in retailing today from managing transactions on registers in stores to managing customers across channels. This has implications not just for store networks but also data models and how retailers gather and manage information – product, customer, transactional - to support a better and more efficient customer experience. Our survey reveals how retailers understand this and are re-architecting their businesses accordingly.

SUMMARY

02

2.1 Stores the foundation of a digitised relationship

Stores are described as a central hub within a multi-channel world. Store brands have begun transforming their distribution format and their sales policy in order to turn the stores into a place for service, events, discovery, experience and collecting goods - well beyond a mere place for purchasing.

Service is the core value, both in terms of efficient service (Click & Collect) and of customer experience (seeing the products and engaging in interactive sales). Products are the key element, yet stores must show some originality in order to turn potential customers into actual buyers.

Stores are the foundation of brand identity, their link with the real world. Whatever distribution models may be driving the momentum for change, no one believes that stores are finished. In Europe, they remain the primary sales channel for retailers and their customers; yet their role and operating model are changing fast so as to meet the needs of any multichannel, complex and mobile buyer. The store is the foundation of a digitised relationship. It is the ideal place to interact with products, to conclude the customer experience, and to deploy sales and marketing innovations. Isn't the challenge right now to bring that ideal place closer to the cash desk receipt?

The economic crisis has reduced growth to simply gaining market share and has thus made it vital to be extremely active in sales and promotions. Accordingly, sales represent the retailers' foremost challenge, both in qualitative and quantitative terms. Store operations are redirected to focus on customers, this within a setting where information is expanding and means of communication are being optimised.

Bricks and mortar stores are subject to economic and social constraints. To meet those challenges, retailers are changing their sales policy.

Distribution networks will gradually start playing a different role as the sector's profile progressively changes. With e-commerce rising as it is and given changing modes of consumption, retailers are forced to maintain traffic inside their stores so they can hold on to their appeal and reshape their networks, adapting them to societal trends.



2.2 Towards a shift in retail through efficiency and customer experience

The foremost players want to combine store efficiency and customer experience in order to improve performance. Underlying this, profit margins and operating accounts are expected to underwrite brand development. European retailers have a tendency to consider 'experiential' solutions as being less effective than 'efficiency' solutions. Besides, a technological solution that only gives customers experiential value is unlikely to emerge on the market.

In this search for balance, there is no such thing as a single model. Retailers' needs are specific, as is their market, their customer preferences, their sector, the kind of stores they have and their growth model.

Technology will not be driving the layout of out the store as some avant-garde venue complete with plasma screens and interactive kiosks. The place where technology will be used the most to structure the relation between experience and efficiency is in the customer relationship itself. Indeed, the multichannel approach will provide the structure for the stores of the future. This will take place through increased multichannel interaction, increased multichannel integration and increased interaction between bricks and mortar stores and all of the other channels so as to reconcile customer experience and operational efficiency. Proof of this can be found in the way in which retailers favour

investments in the following technological solutions: online services, Click & Collect, social networks, self-service, multichannel integration and loss-prevention systems.

Senior managers are bringing together store proximity and digital services. It is as if there is renewed wonder at an in-store experience matching the Internet and mobile phone experience - to be achieved through increased services and mobility for customers who are better informed and better advised.

The future will be decidedly multichannel and technology will be there to support multi-distribution. This approach towards complementary channels tends to boost the store brands' overall appeal. And to top this off, it will optimise customer experience through more information, more services and more fun for the customers.

On the road to change, the obstacles are above all financial (return on investment required to invest), cultural (a natural resistance on the part of customers and sales staff), technical and technological (basic store environments versus complex information systems).

Retailers persist in separating corporate technological solutions from those applying to customers; yet they expect to bring both these technological worlds together within integrated solutions.

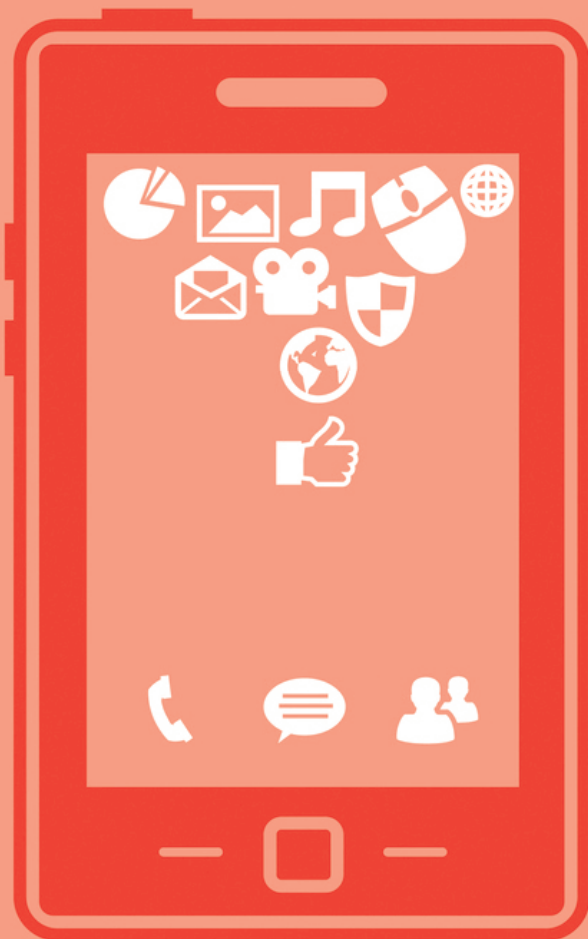
2.3 Customer information: the future revenue stream for retailers?

Companies exploiting customer data is not a recent development. Using loyalty cards, the mass retail sector has already adopted some techniques for promotions and building customer loyalty. But models are changing and so is technology. The fact that consumers are successfully taming digital services is changing everything. Tracking and profiling are becoming more sophisticated. On top of behavioural targeting and standard profiling, we now have geo-location, near-field communication and online-connected objects. To retailers, the qualitative and quantitative growth of customer data can mean an opportunity for profit.

The digital information battle has only just begun with mass data management and increased data quality streaming on repeated occasions over multiple channels. The ability to merge and control customer information is becoming a key lever for efficiency and performance.

Who will be the winner in the race towards understanding the customer? Some retailers who have integrated CRM both online and in stores are well ahead, but do they really know their customers as well as they would have us believe? Securing end-to-end control of any information system is a long-term endeavour, implying substantial material investment but, even more so, human and organisational resources. Those who succeed in mastering the process will certainly get a chance to reach their sales objectives by getting closer to their customers.





STORES as the foundation of a digitised relationship

NOVAMETRIE
ETUDES MARKETING - SONDAGES D'OPINION

3.1

3.1.1 STORES... a means of innovation in customer relations

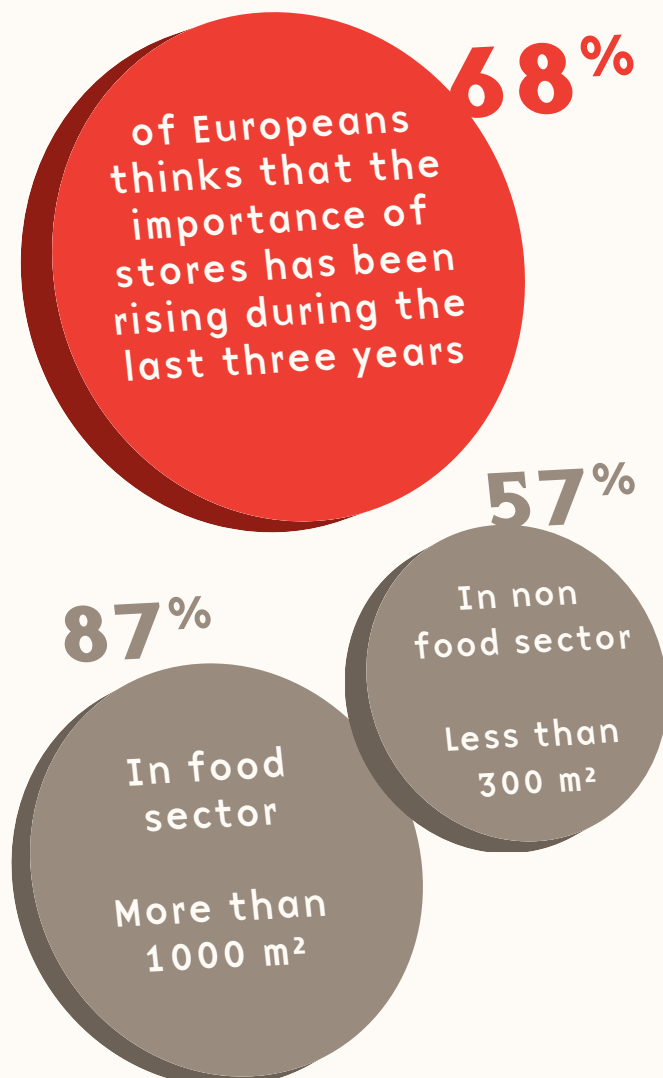
Historically speaking, stores have acted as a brand showcase; as the first place where a brand is on display. A store is the foundation of a brand's identity, geography and strategy ; the place where one can be in contact with products and salespeople, and the only venue able to provide a sensory, relationship-based experience where one can meet, see and touch. Respondents all agree about the vital need for an embodied relationship, one that is real, that is face-to-face.

When asked about the changes happening among store concepts over the past 3 years, two-thirds of retailers said that stores were significantly important to them, especially in the food sector and in stores larger than 1,000m². On the strength of this substantiated legitimacy, store concepts are fostering a change in the traditional role played by stores and based on buying products, now turning to an approach based on providing services.

The importance of stores is rising

Fujitsu European Retail Survey 2013

How has the importance of the concept of the 'store' changed during the last three years?



QUOTES FROM SENIOR MANAGEMENT:

“It’s the nerve centre of any business”

“Combining proximity and digital services”

“Helping the store become more efficient thanks to the Web, and the Web become more efficient thanks to the store”

“To the customer, stores have to be a pleasant experience, where products are highlighted”

At a time when customer behaviour is changing as a result of online and mobile channels, 80% of respondents defined a store as a place for services, and two thirds as a venue for enjoying events, exploring and experiencing.

Confronted with the rising impact of customer relation digitisation, stores are demonstrating unusual characteristics and remain a key element in service relations.

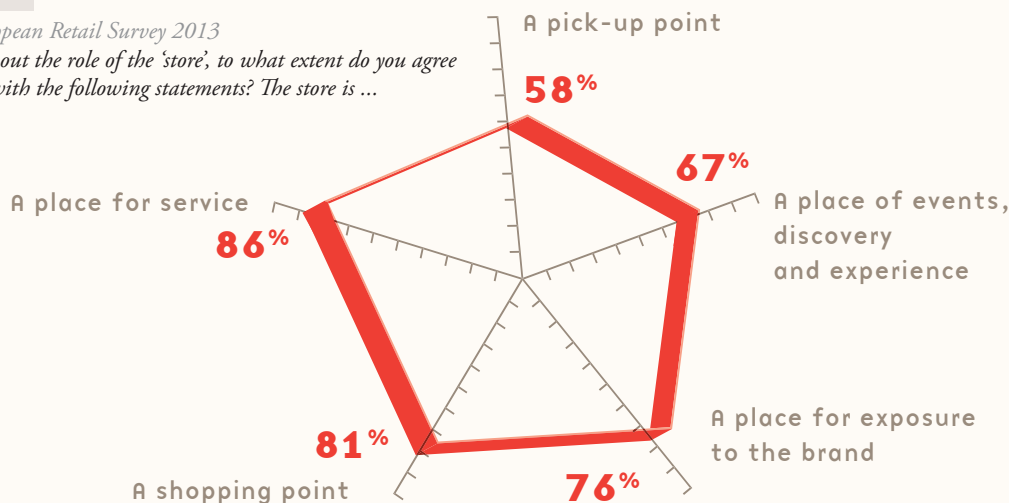
So stores are bound to change. For now they are the primary channel in the relationship, and retailers are determined to turn them into a place that can potentially come up with new forms of expression in customer relations.

Inside the new venues, substantial work has gone into the layout, the green spaces, the design and technological devices (flat-screens, tactile tablets and open-access information kiosks). At a time when customer behaviour is changing as a result of remote channels, the idea is to turn stores into a place for services, events and meetings with the brand. And to rediscover that buying is fun.

Consequently, stores are the natural ‘central hub’ of the entire business, the spot where all kinds of communication means come together in order to attract new customers and to build their loyalty.

The store - a hub at the heart of a digitalized relation

Fujitsu European Retail Survey 2013
Thinking about the role of the ‘store’, to what extent do you agree or disagree with the following statements? The store is ...



3.1.2 STORE APPEAL in the short- and medium-term

While senior managers in the sector no longer have much time for traditional growth models, they do believe that organisational change is a major component in their corporate strategy. Faced with standard models, they are developing new methods of growth using a blend, which explains the emergence of hybrid, multiple models.

E-commerce is suffering from the drop in purchasing power as much as bricks and mortar commerce, yet it is still experiencing growth, albeit a slackening one. In Europe, the momentum of online shopping continues its progression. But as shopping on the Internet becomes commonplace, so the average basket is shrinking. 'Drive' is the new battleground for retailers, who continue augmenting the amount of pick-up points for food shopping ordered on the Internet.

As for Click & Collect, it has great potential and helps customers better manage their time with an extended products and services catalogue.

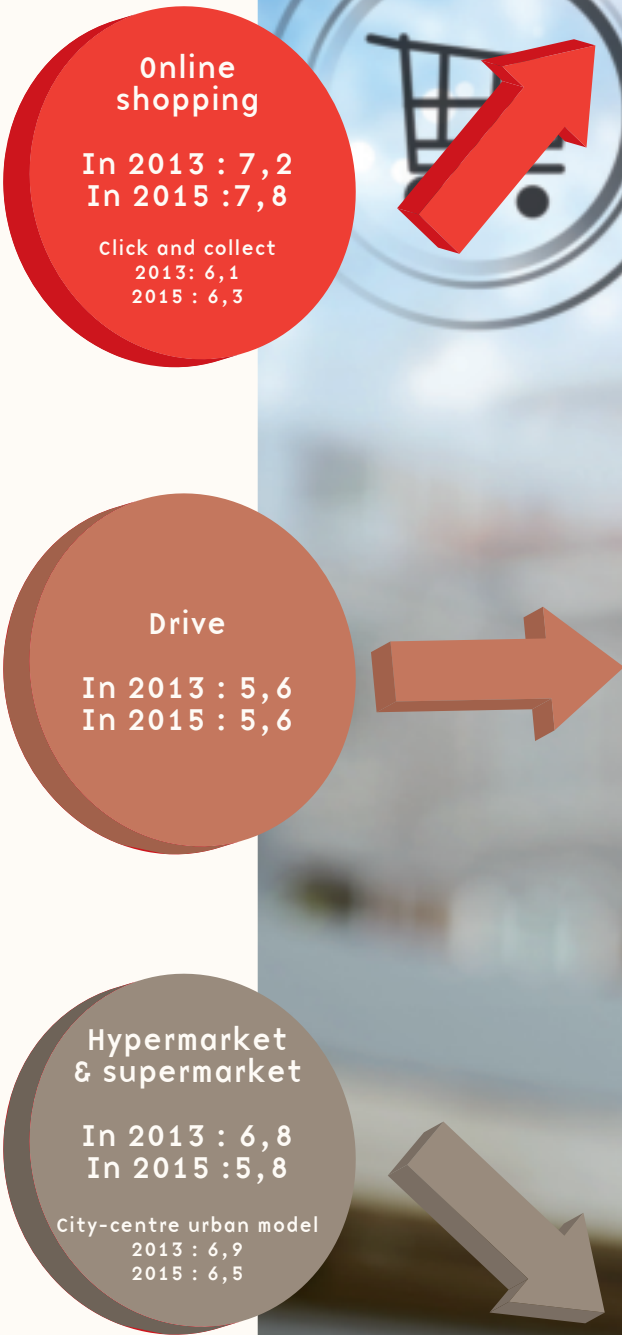
Founded in 1963, hypermarkets today appear to be experiencing some decline in growth. Consumers have changed and the 'all-under-one-roof' concept (a single place featuring a car park, a petrol station, a wide range of food and non-food products at low prices) seems less appealing now. However, this model still enjoys a strong position among managers of brand stores over 1,000m², who believe it has a future.

Lastly, urban city-centre models and their associated growth strategies are confronted with a saturated market and a plethora of competing offers.

Attractiveness of the distribution model

Fujitsu European Retail Survey 2013

Out of 10, how do you rate the attractiveness of the following distribution model?





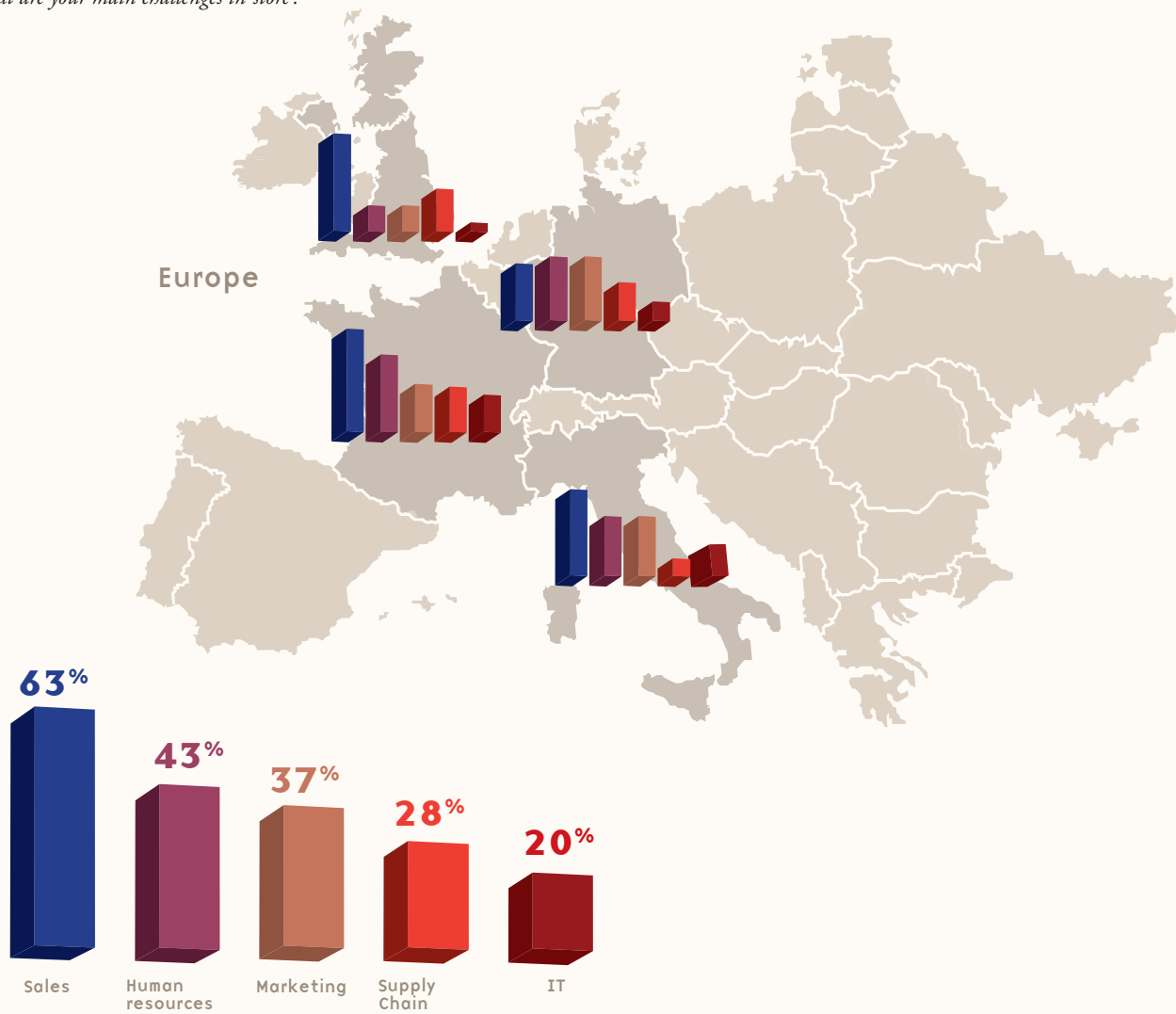
3.1.3 SALES administration and human resources management as priorities

Retailers have to face multiple, concomitant challenges. They have to be both effective and different. The retailers' struggle for growth, efficiency and differentiation is simultaneously defensive and offensive.

Offensively, the idea is to be different from the competition by gaining market share in bricks and mortar stores. Defensively, the aim is to gain full understanding of the online and mobile experience.

*The challenge for retailers: to sell more
and to sell better.*

*Fujitsu European Retail Survey 2013
What are your main challenges in-store?*



All senior managers chose sales as a priority, following a three-pronged approach: increasing customers' average basket, selling new products and services, and providing a range of products beyond the in-store stock.

The second challenge is closely related to the first: optimised human resources management. A salesperson has an obligation to be closer to customers and is a brand ambassador within the store (and sometimes on social networks too). Employees are becoming even more important in fostering customer satisfaction, boosting sales and increasing the sector's profits. Employees can become brand ambassadors through everything they do.

In order to meet all of these challenges, employees must make sure that they understand the technology they are given to work with, turning it into an effective sales tool and ensuring that they are able to provide the right help to consumers who are increasingly demanding, connected and well-informed.

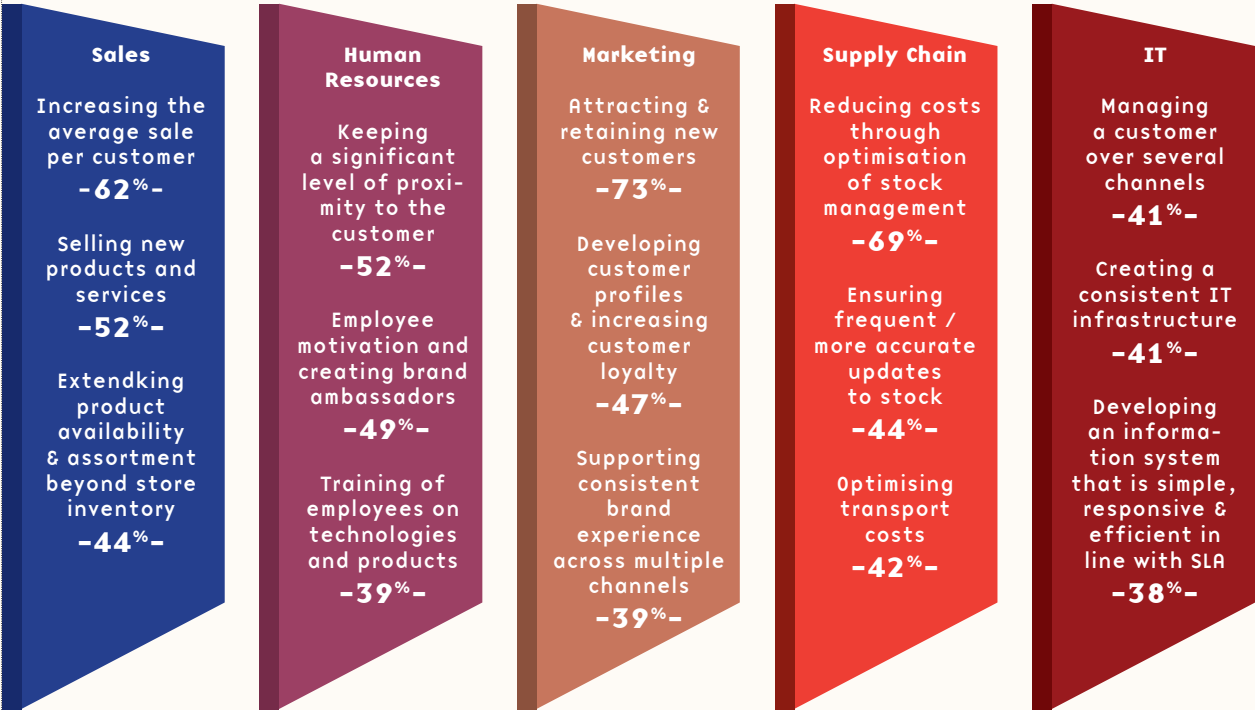
Retailers have to deal with significant challenges in marketing. Taking its cue from the customers' digital culture, marketing must now create breakthroughs and

it must innovate, with a focus on attracting new customers and building their loyalty. In marketing, one does not approach a customer by mobile in the same way as in the store or on a website. Customers react differently when they are in the digital world. This means that in the digital world marketing has to be much more discerning and must know much more about the customer's history, as well as getting there at the right time, with the right offer.

The supply chain is a key function for the sector. The challenge here involves cutting costs, from optimising stock management to reducing transport costs. Taking that perspective, the cost of the last mile is the overriding factor slowing growth in the purely online model in urban areas.

Lastly, there are multiple IT issues to be dealt with jointly. And all with one decisive aim in mind: to be able to manage customers over different channels. Urbanising one's information system should be a simple, responsive and efficient task. The world of stores is such that it will require greater consistency throughout in how information systems are implemented.

The challenge for retailers: to sell more and to sell better
Fujitsu European Retail Survey 2013
In your opinion what are the three key challenges?



TOWARDS A SHIFT in retail through efficiency and customer experience

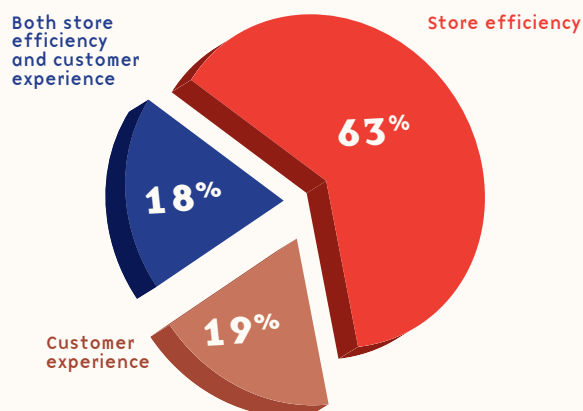
3.2.1 SEEKING a balance between customer experience and operational efficiency

In order to stand out, retailers must solve a complex equation and strive towards achieving a balance between customer service and the cost of such service as well as between productivity and customer proximity. Those who will do so are the ones who are determined to combine customer experience and operational efficiency.

Store efficiency and customer experience for driving increased value

Fujitsu European Retail Survey 2013

What are your current priorities for driving increased value from the store?



Fifty-eight per cent of senior managers believe that the value from stores can increase as long as they focus jointly on customer experience and store operational efficiency.

Only 18% of respondents believe that they should solely focus on customer experience and 17% solely on store efficiency.

The retailer's challenge basically relates to sales and productivity. So we might naturally assume that they would only be concerned about improving operational efficiency.

Retailers are now aware that, unless they transform their approach, there is but little hope for them against the surge in e-commerce. They must therefore enhance customer experience and succeed in keeping up with their customers' online and mobile experiences.

Initial findings seem to indicate that retailers are actually seeking the kind of technology that will help them achieve both goals. Further analysis shows that while retailers want to achieve both goals, they would rather do so by bringing together different kinds of technology. At this point in time, not everyone believes that any technology that can provide better customer experience will also play a part in increasing operational efficiency.

QUOTES FROM SENIOR MANAGEMENT

"The true challenge is to work on productivity without harming customer experience."

"We must seek a balance between customer service and the cost of such a service."

"The real priority is to reintroduce our closeness to consumers."

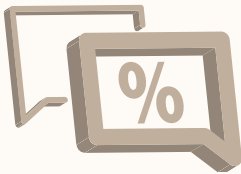


3.2.2 The lack of a single model

As a result, what are the technological solutions that provide the most value to meet this two-fold demand for operational efficiency and customer experience? The survey has unveiled four technology worlds: Multi-channel Environments, Management and Marketing Tools, Self-Service and Store Infrastructure.

15 store technologies around four main streams

Fujitsu European Retail Survey 2013



Management / Marketing tool

Social clienteling
Loss prevention tools
Big Data
Mobile phones



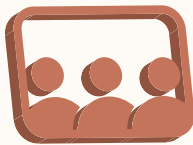
Self service

Personal Self-scanning
Self check-out
Scan tunnel
Kiosks



Store infrastructure

Back office integration
ESL
RFID
Biometrics



Multi Channel

Online based services
Hybrid shopping
(Click & Collect)
Hybrid shopping (Drive)

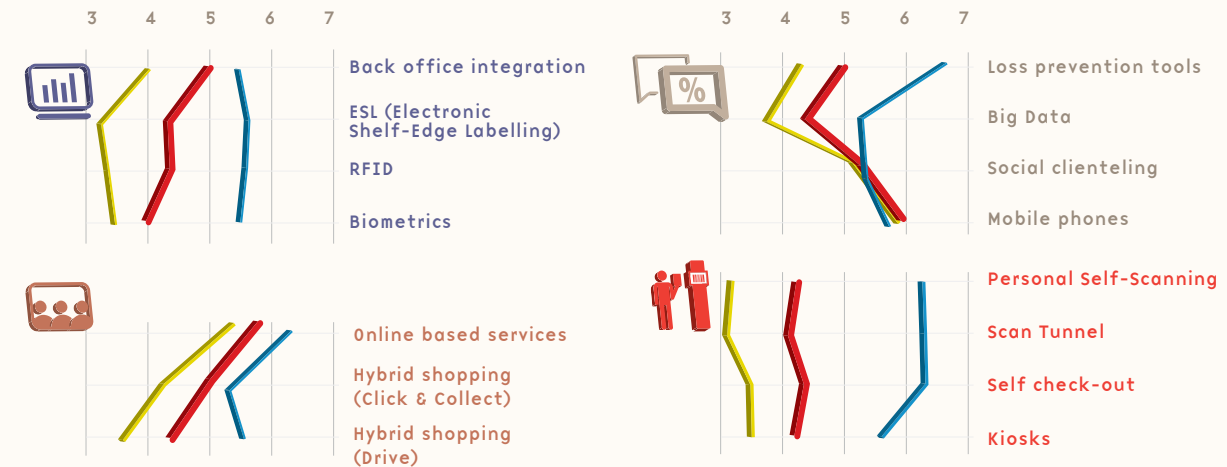
We have identified 15 technologies that our respondents mentioned as currently having the most impact. This list is not exhaustive, yet it does show a snapshot and a panorama of what already exists.

In order to provide a better understanding of the results that we obtained, we have identified 4 technology worlds:

- **Management and Marketing Tools**, whose top benefit is to provide retailers with the means to gain a better understanding of their customers and their business. Thinking beyond the world of mere Business Intelligence, this is the place where current upheavals like social networks and Big Data will have the greatest impact by combining it with the world of smartphones and tablets, widely described as being management and marketing tools.
- **Self-Service**, which includes automated self-check-out machines (SCO), personal self-shopping systems involving shopping carts (PSS), scan tunnels allowing the automated measurement of all shopping cart items dropped on the conveyor belt, and the world of kiosks across their entire spectrum (consumer information, point of sale promotions, but above all else the possibility of selling more than just what is available inside the store).
- **Store Infrastructure**, including the search for a reliable, scalable and transparent information system, and where cross-functionality will be vital as a result of all data and processing being cross-checked between the back and front office. Also, technological innovations like biometrics, electronic labelling and RFID chips which were originally meant for targeted improvements in authentication, traceability, automation and flexible pricing, are now bursting out of their framework as a result of related network technology and the emergence of M2M (Machine to Machine).
- **Multichannel Environment**, includes online services and hybrid models, bordering on e-commerce, whose benefits every retailer wants to bring into the stores so as to seize a share in its revenue.

Value-for-store technology solutions

Fujitsu European Retail Survey 2013
In your opinion, which of the following store technology solutions will deliver most value to your business?

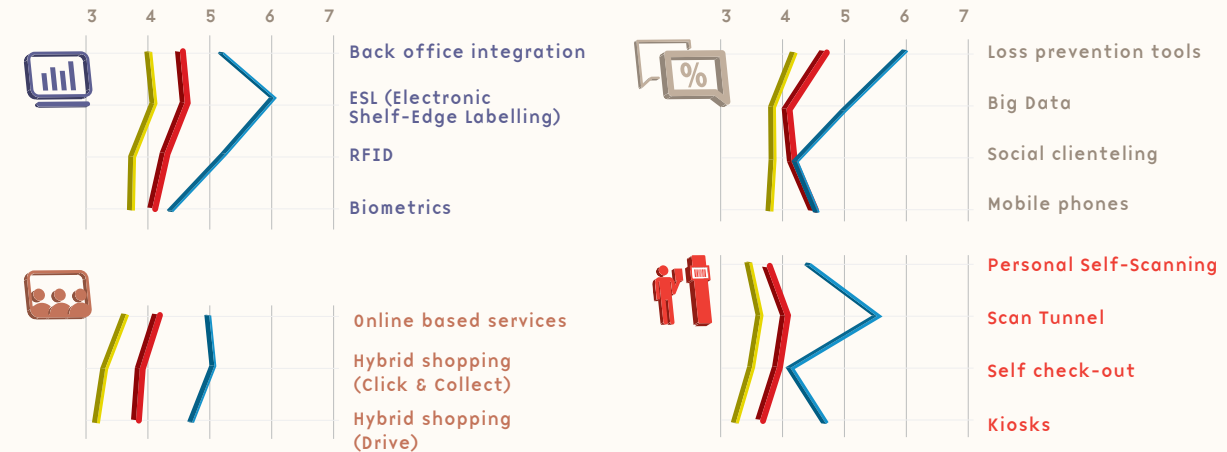


Any contribution to store efficiency is highly dependent on the market segment involved. Accordingly, a multichannel environment is linked to customer experience in small non-food stores and to efficiency in large food stores.

The volumes processed as well as customer traffic are different for each store based on the degree of technological maturity too. Labelling and loss-prevention tools are seen as contributing to efficiency, while 'Drive' and kiosks contribute to customer experience.

Customer experience or store efficiency

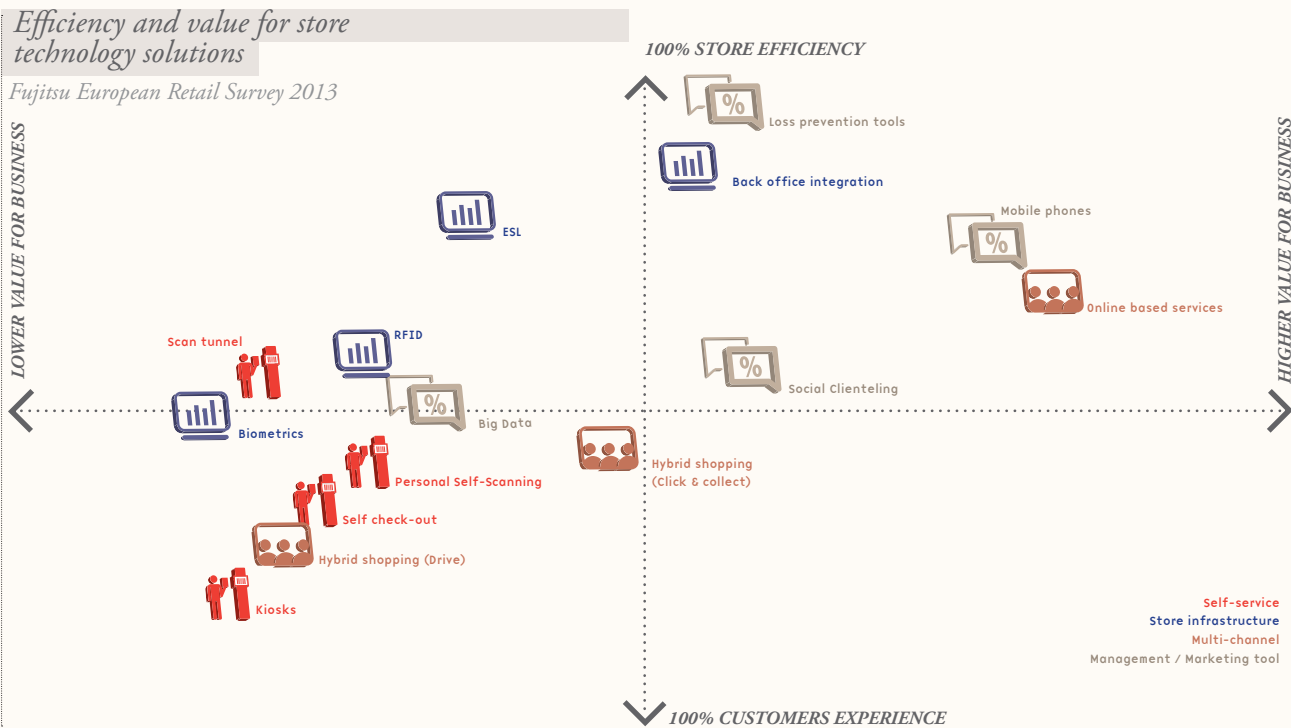
Fujitsu European Retail Survey 2013
In your opinion, how do you categorize the following technology solutions with respect to the increase of customer experience or store efficiency



The values shown here are average figures. It absolutely does not mean that one technology has zero value but rather that these values will vary according to segments and to markets. Some technology is solely intended for specific segments. That is the case for scan tunnels in food stores. However, these averages show that there are some ‘champions’ which are popular among all res-

pondents, especially online services, loss-prevention tools and back office integration.

On the other hand, the widest typical gap involves self-service tools. One notes a shared perspective on social networks and smartphones concerning devices brought into the stores via a customer’s personal use and habits.



Now if we combine both previous results, we notice the appearance of three families of solutions throughout Europe:

- Solutions where value perception is unanimous and seen as tangible and focused on efficiency. These enjoy high average value insofar as they stem primarily from widespread use among consumers (social networks, smartphones etc.) or from benefits that are directly concerned with internal tools (like back office integration and loss-prevention tools).
- Solutions where value perception is poor and related to efficiency. This basically involves technology that is still considered as some form of innovation and whose entry cost makes it the sole preserve of specific players for the time being. Respondents who can assess its

impact gave it high value (in food stores and major stores). To the contrary, those to whom it is of no interest judiciously assigned it a dream quality both for efficiency and for estimated worth.

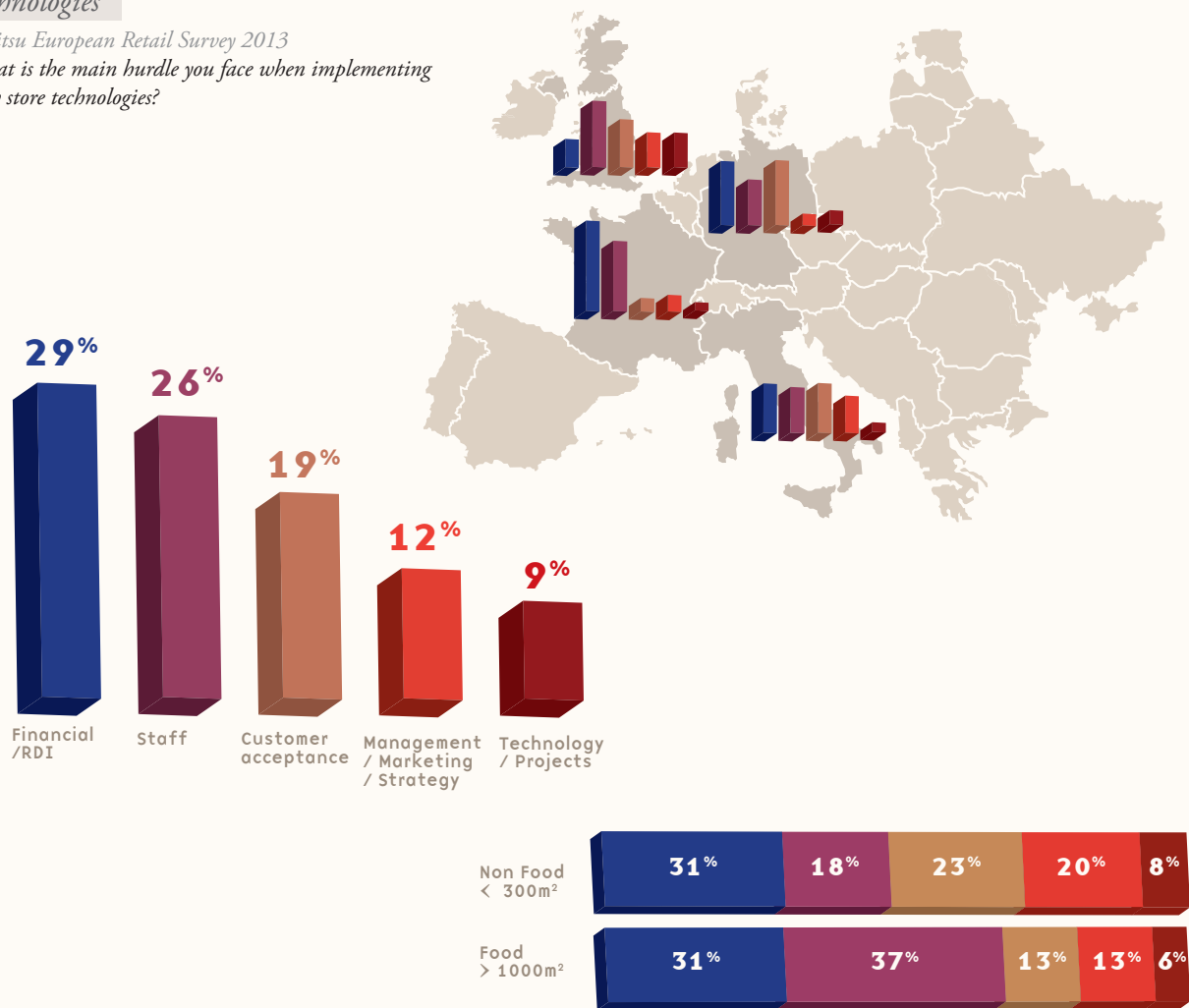
- Lastly, solutions where value perception is mixed and focused on customer experience. They mainly include Self-Service and hybrid offers (Click & Collect or ‘Drive’). This is the category showing the greatest gaps according to players, especially between food stores and smaller specialised stores. While retailers believe that such solutions do provide real benefits in terms of customer experience, they are not very inclined, outside food stores, to acknowledge any contribution they might make to efficiency. Is this the result of common sense, of trade-related characteristics or of a lack of maturity?

What are the main obstacles to implementing these technologies? Just the standard difficulties encountered whenever a business starts to change the way it is orga-

nised? Such projects require financial investments, optimal human resources management and the acceptance of change on the part of customers.

The main hurdles in implementing new store technologies

Fujitsu European Retail Survey 2013
What is the main hurdle you face when implementing new store technologies?



Human obstacles remain significant. Yet resistance to change is less intense. Financial obstacles have grown recently. Senior managers are careful about what they spend. Technological awareness and culture are key success factors, both for employees and internal organisation managers who are meant to drive change. Going from a single-channel back-office to a multichannel front office does indeed require redesigning the entire organisation. In addition to understanding the new

tools, employees are also seeing their profession changing and their role becoming more like that of an expert, and they must be made aware of those changes. On the other hand, it is still as hard to estimate the return on investment, and this uncertainty causes a risk when choosing the kind of investment. The return on investment period is proportional to the size and type of the project.

3.2.3 Towards a digital transformation in stores

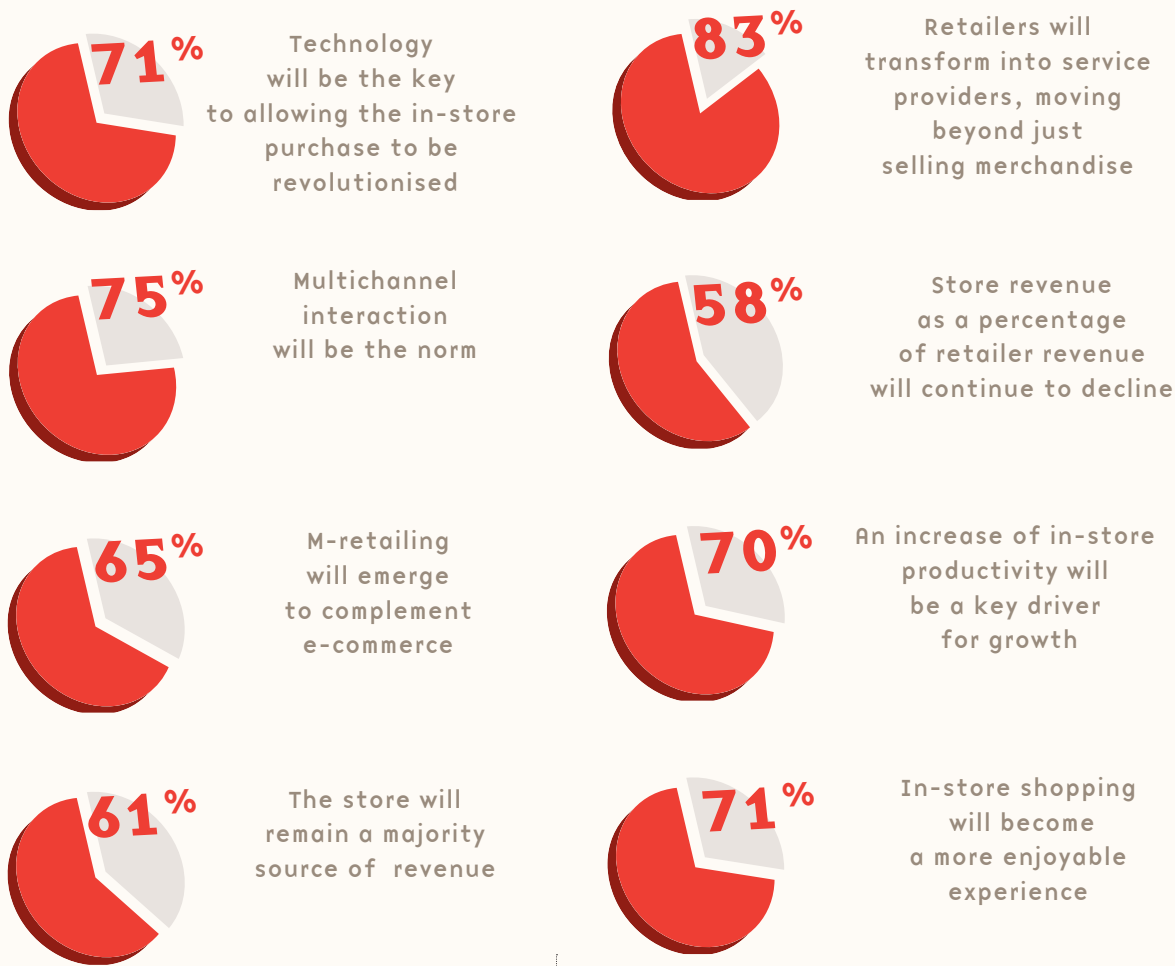
“There are more and more ties between bricks and mortar networks and the Internet.”

Everyone agrees that the role played by bricks and mortar networks will remain extremely significant in the coming years. In some countries, senior managers believe that technology will speed up rationalisation in the bricks and mortar retail network. This network is currently the retailers’ foremost asset.

Customers will learn how to use the new technology and the growth of new technology will lead them to examine the possibility of developing and resizing the bricks and mortar network and in-store purchasing.

Technologies to revolutionise in-store purchasing

Fujitsu European Retail Survey 2013
Thinking ahead to the next five years, do you agree or disagree with the following statements: How is your store concept developing?



QUOTES FROM SENIOR MANAGEMENT

“Managing customer relations that are becoming endlessly complex, especially because of social networks”

In terms of efficiency, seven out of 10 respondents (71%) thought that technology would be decisive in revolutionising in-store purchasing and for three-quarters of respondents, multichannel interactions will become the norm.

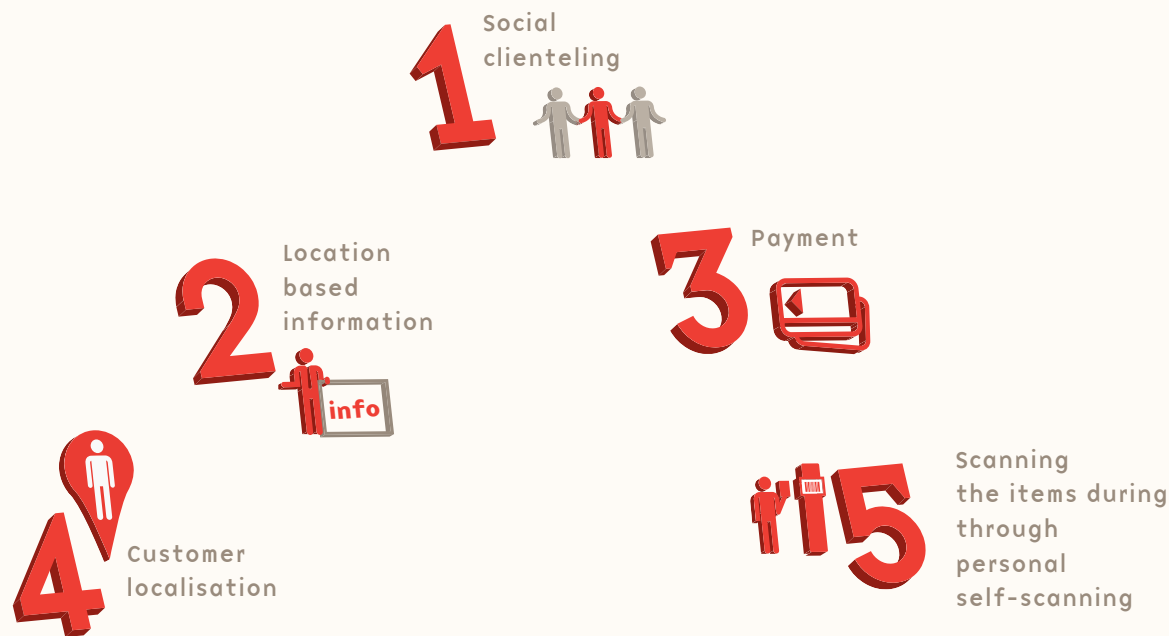
In terms of customer experience, 71% believe that bricks and mortar points of sale will be thought of as more pleasant places. Meanwhile 83% of respondents said that retailers would turn into service providers.

There appears to be a consensus regarding the potential for increased mobile presence within the retail sector. Mobile phones seem to be turning into a customer relations channel in their own right. Obstacles to mobile phone development are now being lifted and customers are showing increasing fondness for this kind of service.

Future mobile phone usage in the store

Fujitsu European Retail Survey 2013

How is mobile phone use most likely to impact your store environment?



Mobile phone use - and the influence it can have on a store environment - provides a host of short- and medium-term possibilities, namely its integration into social networks through promotions, as well as a role in

product information and shopping lists, in payment and scans, and the appeal of geo-located information.

CUSTOMER INFORMATION: the future revenue stream for retailers?

3.3

“We need more information, and this is where the digital battle begins: getting information and comparing it.”

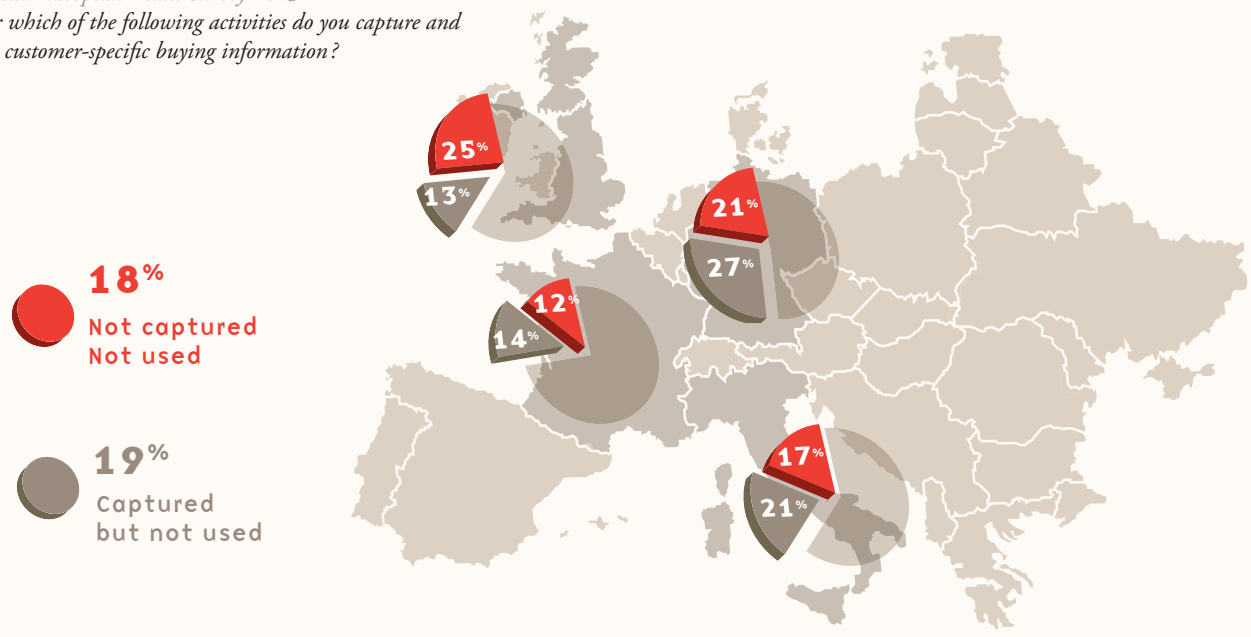
Retailers stated that their customer knowledge is expanding, stemming from increased customer information online, on mobile phones and in stores.

about customers from their purchasing itinerary is a vital priority. Only 14% of retailers integrate store-based, mobile phone and online information into their database.

The need to retrieve and integrate usable intelligence

About 20% of respondents capture information without using it

Fujitsu European Retail Survey 2013
For which of the following activities do you capture and use customer-specific buying information?



There are many opportunities to improve data quality: information, purchases, loyalty cards, complaints, call centres, customer service, and even online activity.

About 20% of retailers collect information without using it, except for information coming from call centres, which appears to be the least correctly collected or used.

It is worth mentioning the unexplored potential of building customer profiles upon sign-up. This operation is often a lengthy one for customers but it is still regarded as useless according to one in four respondents (27%).

The data integrated into customer relationship management (CRM) system come from a host of sources:

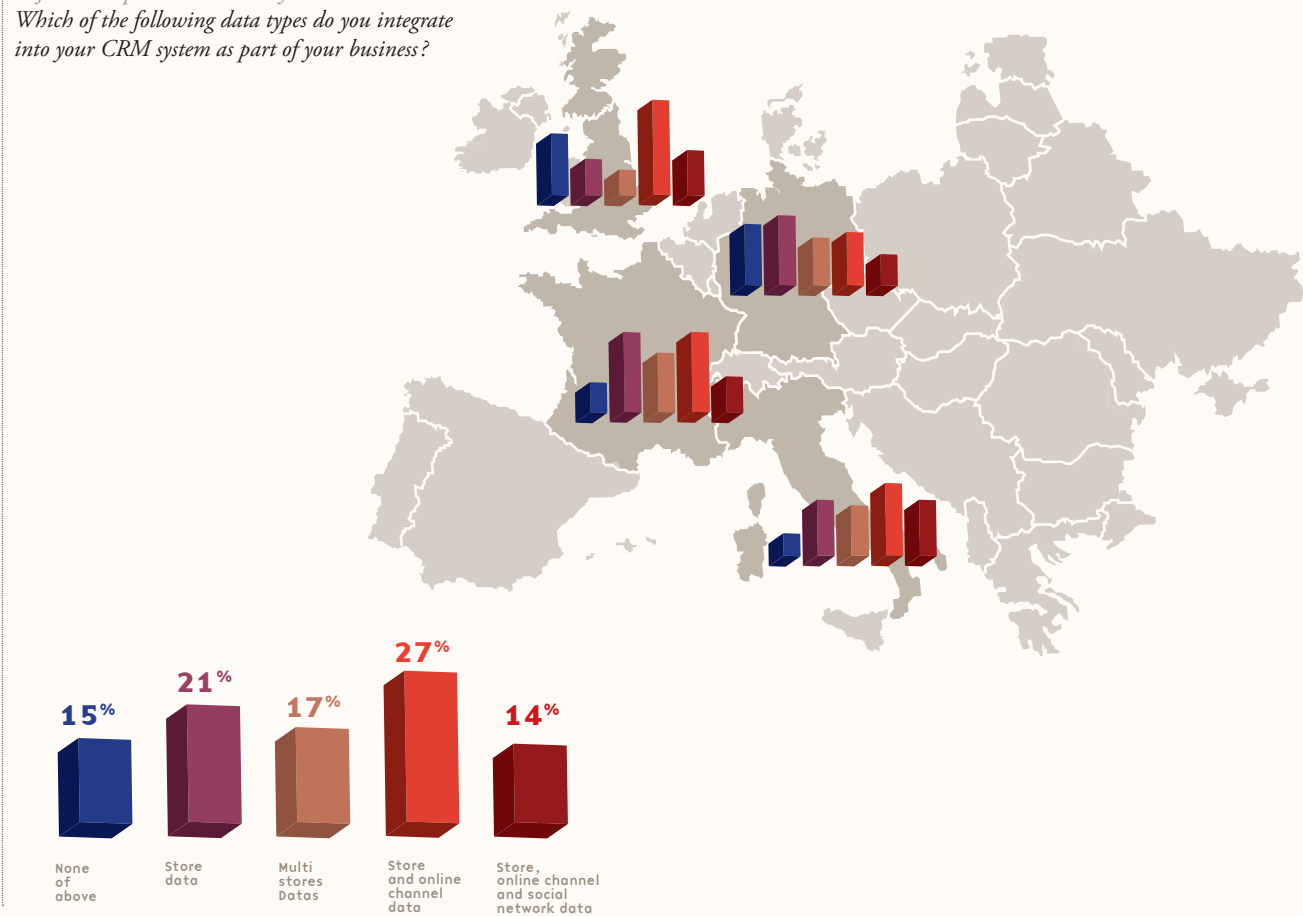
- 27% from both stores and online channels
- 21% solely from stores
- 17% from consolidated data from all stores

It is worth noting that 14% of store brands that are ahead in data integration are accumulating data that comes jointly from stores, online data and social networks into their CRM systems.

Too much information is collected without ever being used and too little of it comes from the entire range of channels.

The data types integrated into the customer relation management system come from multiple sources

Fujitsu European Retail Survey 2013
Which of the following data types do you integrate into your CRM system as part of your business?















AS A CONCLUSION

Technology is now part of a retailer's decision-making and strategic environment. Digital transformation in stores is on the march. But it comes with a trend towards segmentation by type of retail. The same degree of enthusiasm for technology is not shared if one works in food or non-food, in a large store or in a smaller one. The larger the retail network, the stronger the benefit of developing intensive technology-oriented

strategies. All senior management respondents agree that multichannel management is now inescapable. Technology is perceived as an avenue of distribution for products, services and potential leverage to increase productivity. The challenges also differ according to profile. It is vital to correctly choose one's course so as to combine it with the most relevant services in order to drive successful transformation.

Towards transformation in stores

Delivered value (/100)		Less than 300m ²			More than 1000m ²		
		1 ^{er}	2 ^e	3 ^e	1 ^{er}	2 ^e	3 ^e
Food	Values	 56%	 55%	 51%	 60%	 57%	 57%
	Hurdles	1 - Financial / ROI / TCO 2 - Customer acceptance 3 - Staff / skill change management			1 - Staff / skill change management 2 - Financial / ROI / TCO 3 - Customer acceptance		
Non Food	Values	 47%	 43%	 35%	 55%	 54%	 48%
	Hurdles	1 - Financial / ROI / TCO 2 - Customer acceptance 3 - Management / marketing/ strategy			1 - Staff / skill change management 2 - Financial / ROI / TCO 3 - Customer acceptance		



Multi Channel:
Online based services
Hybrid shopping
(Click and collect)
Hybrid shopping
(Drive)



**Management
& Marketing tool:**
Social clienteling
Loss prevention tools
Big data
Mobile phone



Self service:
Personal Self Scanning
Self check out
Scan tunnel
Kiosks



**Store
infrastructure**
Back office integration
ESL
RFID
Biometrics

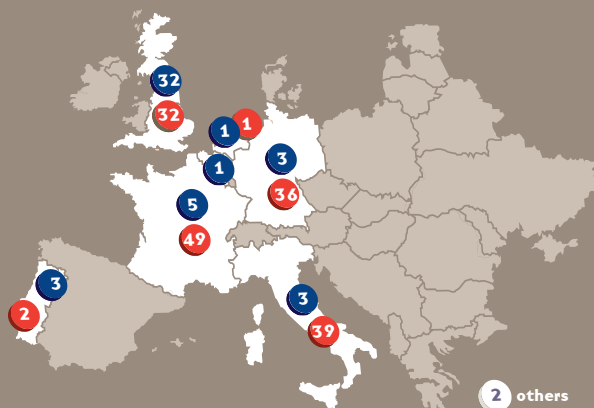
METHODOLOGICAL APPENDIX

Representative sample in food sector and non-food sector. Over half of interviewees are managers and 29% CEOs.

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managers
interviewed from
September 2012 to
January 2013

- 20 during a qualitative survey
- 161 during a quantitative survey



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Study Partners

Retail Solutions from Fujitsu

The retail industry is changing at an unprecedented pace. Cross-border expansion, multichannel shopping, the mobile device and smarter back office technologies are transforming shopper expectations and experiences, store operating models and business performance. Retail executives are looking to stay ahead of the curve and drive profit by offering a differentiated customer experience and increased business efficiency.

Fujitsu works with retailers to help them master these challenges, using IT to take the customer experience and business efficiency to the next level. Building on a deep understanding of retailing that we have gained over the past 30 years with more than 500 customers and 82,000 stores, Fujitsu's mission is to deliver a differentiated customer experience which will increase sales, operational effectiveness and customer satisfaction for our retail clients.

We deliver high-performance, best-of-breed hardware solutions, integrated software applications and multi-vendor lifecycle support services to help retailers around the world deliver on their brand promise and operate more effectively.

Spanning front and back office, our portfolio includes point of sale, mobile and self-service solutions, end-to-end retail business applications, including business analytics, customer loyalty and dynamic digital media, and a suite of managed IT services across the store, networks, applications and infrastructure.

Fujitsu is the emerging leader in cloud and the role of cloud technology and services for today's retailers.

NOVAMETRIE

Founded in 1999, NOVAMETRIE is a research institute specialising in B2B studies with high added value. The institute offers globalised and holistic interdisciplinary methodologies that integrate quantitative aspects and a qualitative approach. The NOVAMETRIE Scientific Committee, made up of academics and experts, offers an innovative operational and strategic vision from designing research programmes to effective recommendations.

www.novametrie.com

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