2019 OUTLOOK GUIDE

TOP TRENDS DRIVING RETAIL GROWTH: AI, VOICE & THE *Reimagined* STORE

retail TouchPoints®

SPECIAL REPORT

2019 OUTLOOK GUIDE

INSIGHTS AND PREDICTIONS FROM 13 INDUSTRY EXPERTS

Retailers are hoping that a solid 2018 holiday season will usher in an even better 2019. There's certainly reason for optimism: high consumer confidence, low unemployment and low fuel prices are generally a winning combination. But as in previous years, every customer dollar will be hard-won. The retail transformation (some called it an apocalypse) that swept the industry in 2017 is still shaking things up, and will continue to do so for the foreseeable future.

The 13 retail industry experts contributing to the *Retail TouchPoints* Outlook Guide bring a wide array of viewpoints and experience to their predictions for 2019. Here are just a few of the big ideas and trends they believe will be shaping retail in the coming year:

- **Artificial intelligence gets real**: Retailers and solution providers will be busy identifying real-world use cases for AI and machine learning, in areas ranging from personalized product recommendations to shipping and supply chain optimization;
- **Voice shopping increases its volume**: Alexa voice shopping increased by 3X during the holiday season, and retailers will need to prepare for expanded consumer acceptance of this touch point in 2019;
- **Reimagined brick-and-mortar stores**: Look for continued expansion of the experiential and "phygital" trends, as retailers continue to make their stores an integral part of shoppers' omnichannel journeys; and
- **Sustainability, transparency and ethical retailing**: These and other former "feel-good" elements are becoming important competitive differentiators for newer generations of consumers.

We hope you find these experts' insights helpful in navigating the fast-changing retail industry in 2019, and that you leverage the opportunities they've identified to benefit your companies, your partners and your customers.

Adam Blair

Adam Blair
Editor
Retail TouchPoints

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Contributors

FIVE WAYS RETAILERS WILL TRANSFORM IN 2019

BRYAN AMARAL, FOUNDER, PRESIDENT AND CEO, CLIENTRICITY, LLC

Today's retailers seem to finally understand that fickle, digitally savvy consumers have increasingly high expectations, and that the old playbook won't ensure future success. According to a recent PSFK study, **54%** of consumers expect retailers to be able to institute change within six months. While digitally native brands are imbued with an agile mindset and a customer-first, digital-first philosophy, most established traditional merchants are not, and can't move that quickly.

E-Commerce will continue its estimated growth of **21.5%** in 2019, faster than brick-and-mortar. But even as highly engaged D2C brands create innovative physical spaces and immersive customer-centric digital experiences, most traditional retailers approach digital innovation as a "test and learn" add-on to their existing formats, outdated operating models and siloed reporting structures. Not surprisingly, many of these tinkering projects don't achieve the anticipated ROI.

Here are five ways we see retailers creating true digital transformation in 2019:

1. Phygital Discovery And Curated Brick-And-Mortar Experiences

Stores aren't going away, and consumers enjoy discovering new products in exciting environments. Hot digitally native brands like **Casper** and **Allbirds** are expanding physical locations, as chain retailers "right-size" with fewer and smaller stores. An emerging real estate and co-working concept coined "Storefront as a Service" is popping up in major cities. Showfields in New York, Re:store in San Francisco and WeWork's WeMarket are three examples of innovative next-gen spaces designed to showcase digital native brands by leveraging interactive displays, knowledgeable mobile-enabled staff and a well-executed customer engagement strategy. These spaces allow the brand to control the narrative and gain real-time market feedback.

Similarly, creative niche brands are being discovered in carefully curated, constantly renewing spaces like STORY in New York, which was recently acquired by **Macy's**. The department store also invested in b8ta, another "storefront service" that showcases unique tech products in 80 locations. Big retailers are trying to decode the formula on how customer-centric thinking wrapped with technology creates successful young innovators, as evidenced by **Walmart's** acquisition of **Bonobos**.

2. New Opportunities For AI

A recent study indicated that **55%** of retailers plan to leverage AI over the next three years. Historically, AI has been most prevalent in consumer insights, inventory management and price optimization. However, AI is now becoming the engine that enables personalized 1:1 interaction and expert product

recommendation. For example, one startup leverages AI to visually recognize fabric patterns and marry that with key body and garment measurements, in order to display individual wardrobe recommendations based on a customer's career/lifestyle, desired fit and budget. IBM's Watson platform has applications as diverse as curating home décor to selecting jackets at **North Face**.

3. Chatbots And Conversational Commerce

Retailers seeking a personal touch to consumer engagement are deploying e-Commerce chatbots, powered by AI learning algorithms, that enable human-like interactive dialogues and real-time predictive recommendations. Voice-controlled shopping assistants on Alexa and Google Home are also gaining momentum. Currently, these "skills" are limited to simple replenishment tasks and promotional messaging. However, as voice search evolves, we'll see mobile-location-aware search enhancing in-store shopping journeys.

4. Personalized Experiences And Associate Empowerment

Deploying mobile devices for associates continues to gain momentum. However, few retailers have fully monetized benefits from their investment. Mobile POS, order management and training remain the most common mobile use cases, but clienteling has made the biggest long-term business impact to frequency, ATV and customer loyalty. While more vendors are selling solutions, customer success is often elusive. In the year ahead, we'll see more retailers stop tinkering and start upgrading their clienteling and assisted selling practices and training, as part of a broader retail transformation initiative.

5. Transparent, Efficient And Ethical Supply Chains

To reduce costs and enhance product availability, retailers, suppliers and logistics partners will continue to collaborate to improve visibility and efficiency in their retail supply chains. In the year ahead, expect to see more pervasive use of IoT sensor networks, and greater investment into blockchain technologies that improve how retailers track shipments, authenticate luxury goods and ensure the safety of food products. New supply chain solutions will also meet growing consumer demand to know that goods are sourced ethically.

In a reinvented retail world, tomorrow's winners must reconsider how products are bought, sold, delivered and serviced. They also must discover which new operating models, business processes, management practices and technologies are required to nurture extraordinary customer relationships and optimize every part of their business.

OVERHAUL THE DECISION MAKING PROCESS TO ACHIEVE UNIFIED COMMERCE

Q&A WITH JON BECK, CEO AND STUART ALDRIDGE, PRINCIPAL AT COLUMBUS CONSULTING

Retail TouchPoints (RTP): ***Where do you feel retailers need to improve the most when it comes to integrating sales channels in 2019?***

Jon Beck: Every company is in a unique place, and you'd think it would be so easy, but it's not easy. It's a long journey because you have so many things that have to be aligned under old corporate organizational structures. If you grew up today as a young company, it's easier — you just grew up in this world where you didn't have an established Senior VP of Retail or Senior VP of E-Commerce.

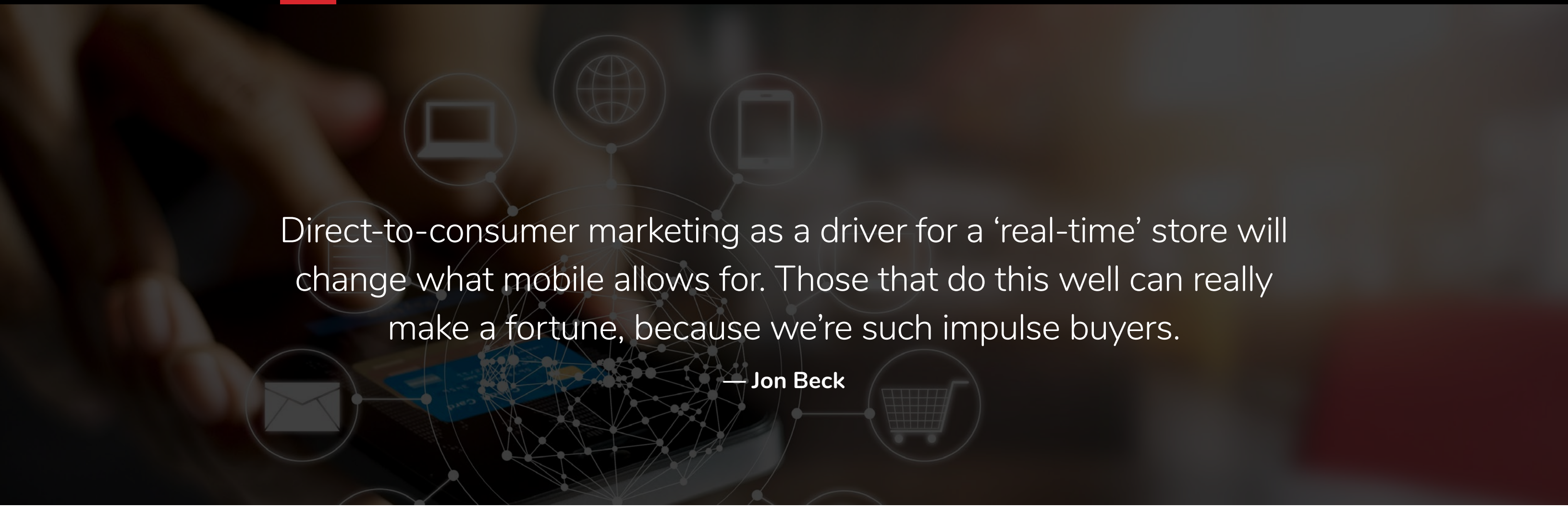
The transition for everyone else is hard, but they all see the need to get there, and everyone has a unique journey depending on how their personnel are configured and where their problems are. I talked to a company last month that asked, 'How should we reward people between cross-channel sales? We haven't settled that yet.'

Stuart Aldridge: There's an operational element to getting your business on a unified commerce framework so you can transact and fulfill from anywhere, anytime. That's a fairly straightforward exercise, but the more difficult part of that is: What decisions do you change or make differently because you're now operating in that different world?

Credit for the sale is one of them. How do you place and purchase orders and manage responsibility across channels versus across a unified enterprise? Additionally, how do you leverage the data you're now extracting to make decisions in a more informed fashion?

A lot of retailers have gone through the first wave of that — operationally they can take an online sale and fulfill from a store or a DC, and they can manage that transaction. We're presently in the second wave of figuring out what we can do, from a leadership and a head office perspective, that is going to have to be more efficient in taking advantage of these channels operating as one.

Then of course you get into analytics, AI and machine learning, which will be the third wave of inventiveness in a unified commerce world.



> Direct-to-consumer marketing as a driver for a ‘real-time’ store will change what mobile allows for. Those that do this well can really make a fortune, because we’re such impulse buyers.
>
> **— Jon Beck**

RTP: ***Where does fulfillment fit into all this, especially as consumers demand more rapid deliveries?***

Beck: You have to move toward finding the propensity to sell products in particular locations at particular times, and use that as the centerpiece for positioning inventory, all the way back through the buying decisions and the supply chain. The interconnecting of that backend, so that you have your goods in the right place to sell at the right time, and doing that efficiently, is the key here.

At the order management or fulfillment level, that’s the transaction. Getting ahead of it and being better able to forecast that transaction at a geo- or aggregate level will directly improve the process.

Aldridge: There’s also been a lot of discussion regarding buy online/pick up in-store as a mechanism to fulfill from store locations and manage your inventory without incurring significant shipping costs. But I personally think that’s somewhat of a band-aid solution. It gives the retailer the option to tell the customer, ‘You can order online and get that product relatively close,’ but if you’re trying to compete with Amazon, I still think it falls short from a customer experience point of view.

While it’s a valid play for retailers, I think it’s only going to be an entrance step to true ‘click-to-ship-to-door’ fulfillment. I don’t see it as being an end play in that sense.

RTP: ***We’ve seen plenty of growth in mobile over the past two years. Where do you see mobile expanding next as unified commerce continues to be top-of-mind for retailers?***

Beck: Big brother’s watching, you’ll walk by a store and they’ll send you a discount card to go inside and buy something. That’s one way for sure that you can easily tie a customer’s phone and location to the store. That’s going to continue to improve as retailers improve. There historically hasn’t been enough spend on mobile marketing, period. But in this case, direct-to-consumer marketing as a driver for a ‘real-time’ store will change what mobile allows for. Those that do this well can really make a fortune, because we’re such impulse buyers.

Aldridge: Mobile is a great opportunity to leverage all the data you capture. Now there’s so much detailed information about people’s spending habits and their preferences for certain products, so you have a direct connection to that consumer geographically when they’re near one of your locations. Once that data surfaces, there’s an obvious connection to the consumer.

OPERATIONAL EFFICIENCY WILL SPEARHEAD ORGANIZATION-WIDE TRANSFORMATION, PROFITABILITY

ANDREW BILLINGS, PRINCIPAL, RETAIL AND SUPPLY CHAIN PRACTICE, NORTH HIGHLAND

While consumer spending continues to be a bright spot for retailers entering 2019, North Highland's annual Beacon survey of industry executives indicated that retailers are eyeing the bottom line as much as the top line.

Executives across all retail segments identified Operational Efficiency (OE) as their top strategic priority for 2019. The **93%** of executives citing OE as a top priority represents a significant increase over previous years.

Despite retailers indicating that a robust OE capability creates a competitive advantage, only **20%** of executives feel their organization is prepared to drive significant margin improvement. This dichotomy between OE priority and perceived preparedness is a reflection of several current industry trends that North Highland believes will continue to influence retail profitability in 2019:

1. Counteracting Operational Efficiency Headwinds

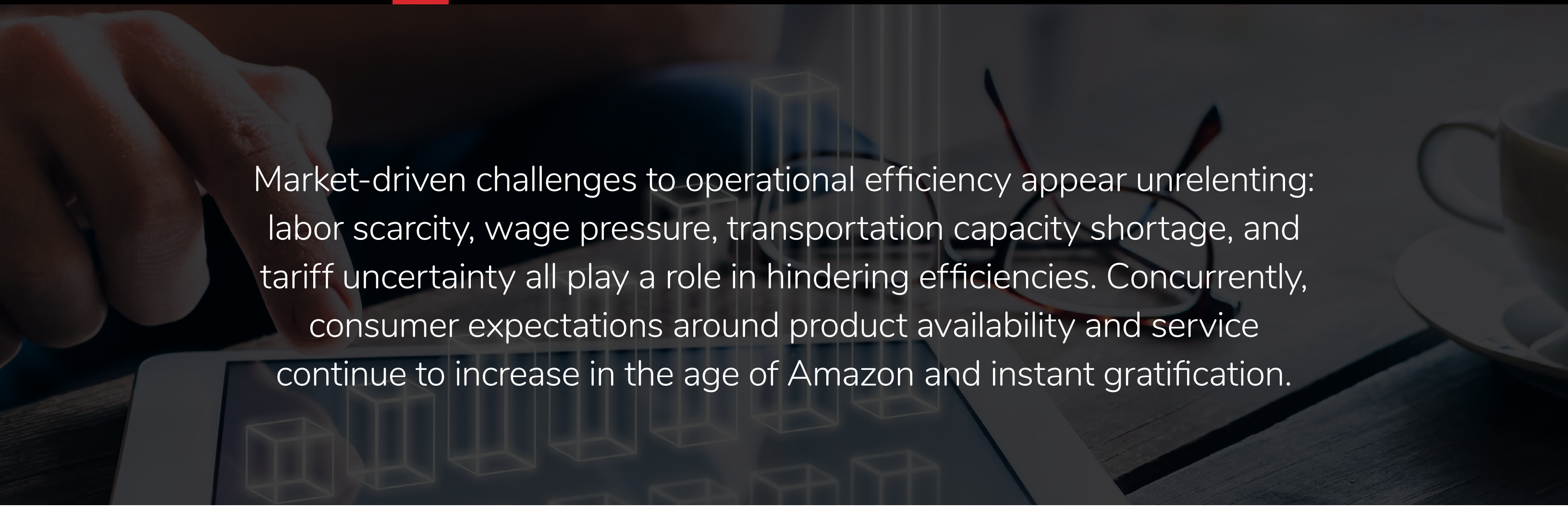
Market-driven challenges to operational efficiency appear unrelenting: labor scarcity, wage pressure, transportation capacity shortage, and tariff uncertainty all play a role in hindering efficiencies. Concurrently, consumer expectations around product availability and service continue to increase in the age of **Amazon** and instant gratification.

These market forces place retailers at the intersection of customer service and efficiency. While some of the market trends may be relatively short-lived, the decisions made by retailers across merchandising, supply chain, store operations and human resources may have long-term impacts on operational efficiency. Examples include: geographic sourcing investments based on the potential of increased tariffs on Chinese goods, and distribution network design decisions based on lowering exposure to the long-haul transportation market.

The Beacon Report findings indicate that retail executives appreciate the magnitude of the challenge in front of them and the need for effectual and decisive action in 2019 to grow margin.

2. Optimizing Operations Through Technology And Analytics

Robotic Process Automation (RPA) continues to gain momentum in replacing manual back-office tasks, increasing both speed and accuracy of execution. A myriad of warehouse automation technologies are transforming order fulfillment via increased storage and throughput, reduced error rates and lower reliance on warehouse associates. Real-time tracking of in-transit merchandise is enabling more precise scheduling of labor within warehouses and stores.



Market-driven challenges to operational efficiency appear unrelenting: labor scarcity, wage pressure, transportation capacity shortage, and tariff uncertainty all play a role in hindering efficiencies. Concurrently, consumer expectations around product availability and service continue to increase in the age of Amazon and instant gratification.

Analytics leveraging internal and external data for decision-making continue to evolve at a rapid pace. Inventory placement is increasingly guided by predictive models across both normal and exceptional business conditions. Leading retailers have built predictive consumer demand models for specific product types based on weather conditions, enabling optimal movement and positioning of inventory to meet increased demand.

The proliferation of technology and analytics use with leading retailers has increased the bar for Operational Efficiency across the industry, far beyond having a team of Lean-certified process engineers roaming the halls. The low level of preparedness to execute against OE goals in 2019 captured in the Beacon Report supports the view that most retailers are still in the infancy stage of deploying technology and analytics to reduce operating costs.

3. Creating A Culture Of Efficiency

With the rise of Operational Efficiency as a new obsession point for retail senior executives, new initiatives will have ripple effects throughout the organization. The most successful organizations are beginning to engrain Operational Efficiency into their culture, where team members begin to ask: "*What is the impact to efficiency*?" immediately after "*What is the impact to the customer*?"

Traditionally, efficiency initiatives were born out of the "operations" side of the house (supply chain, inventory, stores). However, retailers that have created a culture of efficiency are changing the paradigm under which key cross-functional decisions are made, by driving collaboration between merchandising/product design and downstream operations. Under this cultural model, the decision to add a new product to the assortment may now consider the total cost impact to sourcing, distribution and store operations, to gain a more holistic view of product profitability against sales growth targets.

In conclusion, as market forces continue to evolve in 2019, leading retailers will continue to make investments in Operational Efficiency capabilities through new technology, analytics and cultural transformations. Organizations that promote cross-functional efficiency programs over individual functional initiatives will capture greater value and weather future market forces.

HOW THE STORE EXPERIENCE CAN JUSTIFY PHYSICAL RETAIL IN A DIGITAL AGE

MICHAEL BROWN, PARTNER, RETAIL STRATEGY, OMNICHANNEL INTEGRATION, A.T. KEARNEY

In a near future when long-term mindshare will be a more critical retail metric than quarterly market share, the traditional store — defined by four physical walls and no digital connectivity between shopper and retailer — risks becoming a rare and endangered species. This is why its mission must keep evolving as the digital age becomes further entrenched.

When the Internet fully opened to e-Commerce in 1991, consumers quickly adapted to the idea that "stores" could also be web sites, such as **Book Stacks Unlimited**, an online bookstore launched in 1992. Two years later, **Amazon.com** opened as a competing online bookstore and shopping has never been the same.

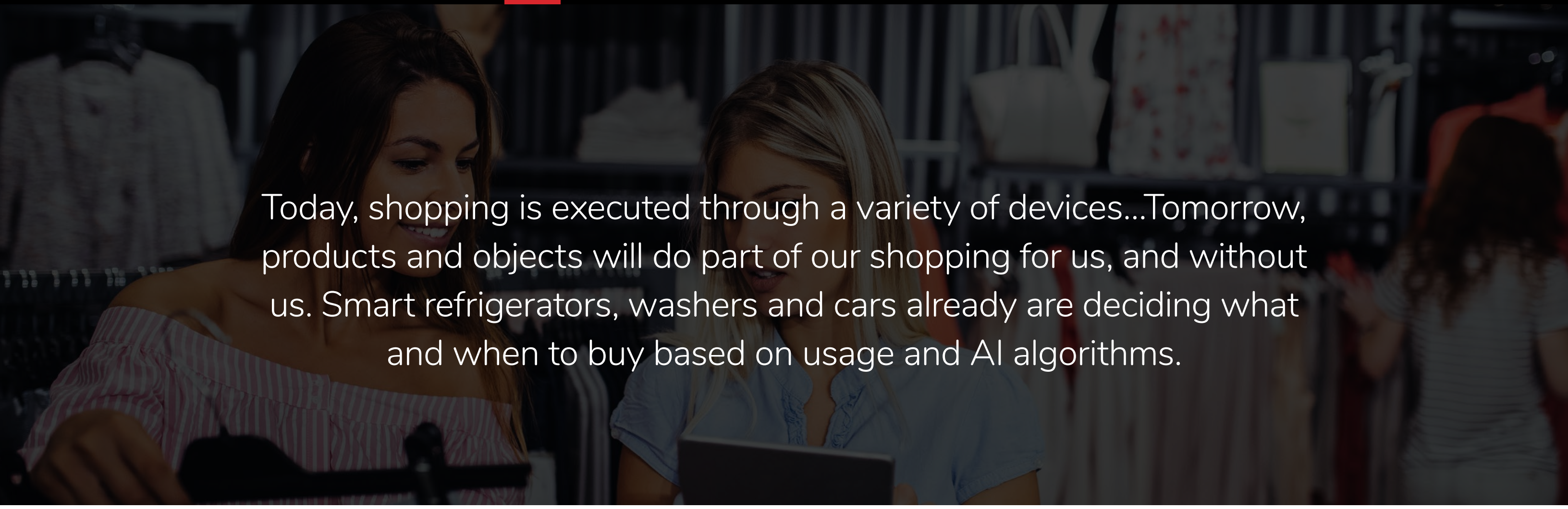
So-called "omnichannel retailing" evolved as brick-and-mortar retailers sought ways to compete against new, digital competitors in a world where shopping could be done in person, online or on an app.

Today, shopping is executed through a variety of devices, from voice-activated technologies like the Amazon Echo and **Macy's** beacon technologies to Disney's MyMagic+ band and EON-ID thread — described as the first "intrinsically incorporated" RFID system, which when woven into textiles directly connects clothing to the IoT. Tomorrow, products and objects will do part of our shopping for us, and without us. Smart refrigerators, washers and cars already are deciding what and when to buy based on usage and AI algorithms.

Tomorrow's challenge for retailers is thinking about a store as a place where experiences help capture a shopper's imagination, build engagement points connected to their lifestyles and beliefs and create value for brands even without immediate transactions. Adopting an "experiential retailing" strategy, a store's mission becomes attracting customers so that they can see, interact and build connections with products and brands that become organic extensions of, or supplements to, their lifestyles.

Do that and the sales — on and offline — will follow.

What might this new form of retailing look like? We've already seen it take the form of fashion shows, cooking classes or DIY activity workshops. This is now being broadened to include educational events like talks by designers, chefs, outdoors experts, etc.; a broad variety of community events; and even appointments with a personal shopper who does "pre-shopping" and suggests purchases.



> Today, shopping is executed through a variety of devices…Tomorrow, products and objects will do part of our shopping for us, and without us. Smart refrigerators, washers and cars already are deciding what and when to buy based on usage and AI algorithms.

The store is just one node in the Experiential Retail network. It must be supported by a new omnichannel or connected store infrastructure that uses AI to track past purchases and anticipate future needs; schedules stylist appointments; creates real-time wish lists and personal “registries” accessible to selected contacts; uses interactive forms of social media able to respond to individuals; facilitates subscription purchases; uses AR and VR displays and tools to build excitement — all as part of a frictionless continuum that informs the supply chain.

While traditional retailers are still struggling with experiential retail, progressive operators have started to adopt it. The new **Apple** stores are still the best example of putting brand and experience ahead of immediate transactions. **Cabela’s** and **Bass Pro Shops** are recreational destinations for sportsmen and their families, and **Restoration Hardware’s** Mansion stores have transformed the way consumers experience the RH lifestyle.

On the omnichannel/connected store infrastructure front, retailers like **IKEA** make shopping easier by allowing customers to navigate through their stores via a guided route that has been created to pick items from a shopping list built at home. These are just examples of an experiential concept that will become more robust over time, as retailers discover their own creative ways to bring in a digital capability that reinforces the connection.

All this noted, the sort of innovation we’re envisioning here is not going to fit all retailers, or all customers. By nature of what they sell, some traditional stores, especially in sectors like food, drug and mass — where cost-conscious shoppers may reject “bells and whistles” in favor of the lowest cost —may not want to sacrifice valuable margin points in the pursuit of digital engagement.

But for the profitable parts of the retail market, stores will learn to leverage experiential design, merchandising and new technology tools to do the same thing retailers have always done — acquire customers, retain customers and increase those customers’ lifetime value. By making them a critical part of an extended commercial ecosystem, Connected Experiential Retailing promises to make physical stores matter. Purchasing may not be the primary goal of the 21st century physical store, but it will still be the end goal of 21st century retailers.

REIMAGINING THE DEFINITION OF RETAIL

BRIAN BRUNK, PRINCIPAL, BRP CONSULTING

I've previously highlighted the "Great Retail Transformation" — the historic wave of disruption that is sweeping through retail. We continue to see the negative side of this disruption, with more than **5,000** store closings and **16** U.S. retailers filing for bankruptcy in 2018. However, we also saw some positive news with strong retail growth, 2018 YTD retail sales up **5%** (through November), and great stories about retailers that are adapting their in-store experiences to experiential retail concepts that meet new customers' expectations.

As we consider the evolving store of the future, we find ourselves asking fundamental questions like, *What is retail?* and *What is a store?* While the definition of retail has evolved, it has always centered around the concept of a market — from early local markets, to the growth of mercantile and department stores, to shopping malls, to whatever is next. Regardless of format, brick-and-mortar retail remains a real estate game. Now, we're seeing the rise of creative uses for retail real estate, as brands create a customer experience that breaks the mold of traditional retail perceptions. The trick is to morph your store into new experiential forms that appeal to consumers.

- Complementary Brands: Store-within-a-store is nothing new, but we're seeing more retailers sharing real estate with complementary brands. One great example: **Target** and **CVS**, two brands that traditionally overlapped and competed. Now, Target has turned over its in-store pharmacy operations to CVS. **JCPenney** has experienced success with **Sephora** shops in its stores, and **Best Buy** carved out space for Sony, Samsung, Microsoft, Pacific Kitchen and Magnolia in many of its stores.
- Multipurpose Space for Food, Beverage and Events: A growing trend is multipurpose utilization of real estate. An interesting example is the focus on adding food and beverage options, such as space for a café or restaurant. This has been a trend with both small, boutique retailers and large fashion retailers like **Brooks Brothers** and **Tiffany's**, which have added or are exploring cafes, tea rooms, bars or even dedicated private event space, to better engage customers and maximize their real estate. Every segment seems to be exploring this in its own way, with more grocers, such as **Whole Foods**, adding restaurants. As shopping behavior continues to change, we expect this to become a much larger play for retailers looking for new experiential brand strategies to increase store dwell time and generate much-needed additional revenue.

- **Real Estate Sandboxes – Brands and Specialty Renaissance:** As the retail landscape changes, online retailers are opening physical stores, and traditional retailers are experimenting with new store concepts. We are also seeing several traditional manufacturing or wholesale brands now expanding their retail presence for greater control of their brand experience. With the retail landscape morphing, we also expect to see a renaissance of more curated, specialty retail as customers demand more options and in-person experiences with knowledgeable associates. Manhattan is a great model of this, as new entrants look to take advantage of vacant retail space. For example, Brookfield Property Partners recently bought property on Bleecker Street to create an incubator space where new entrants can test brick-and-mortar strategies.
- **Virtual Showrooms – Beyond The Four Walls:** With AR and VR adoption spreading, especially in certain segments, the idea of what represents retail real estate is transforming and expanding. It’s no longer just the store — it can be almost anywhere, including the customer’s home. Retail stores have traditionally been the focal point for the theater of retail, but now AR and VR allow the customer to directly control where that experience happens. **Macy’s** is a recent example, as they’re currently rolling out a new virtual VR across 70 locations — combined with an AR app for home use — to offer an immersive furniture shopping experience that allows browsing and visualization of a much larger assortment of furniture than a typical store. Sephora’s “Virtual Artist” app uses AR to scan your face, figure out where your lips and eyes are, and sample different looks on your smartphone.

Retail offers the vision, value and convenience offered by the curator. That is what defines retail. Consumers want to shop versus just source items, and that is what they need and want from retail. Traditionally, retail space is the theater where this takes place. The future of retail remains very interesting, as we see themes like the renaissance of specialty, brand expansion and the evolving experiential theater creating headlines that define the store of the future.

CREATING THE EXPERIENTIAL STORE

LAURA DAVIS-TAYLOR, CO-FOUNDER, HIGHSTREET COLLECTIVE

What can retailers do to entice shoppers into the store and keep them there to complete purchases?

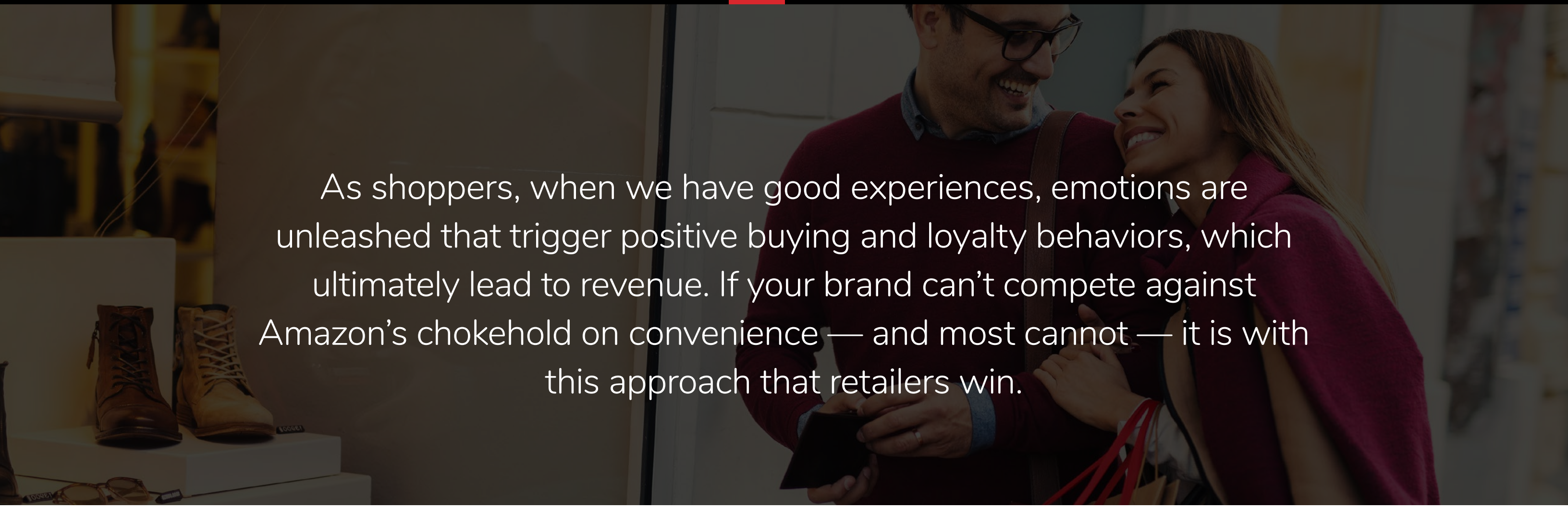
Decades into the sea change of this industry, it appears we've arrived at one universal truth: *stores must now stand for more than transaction*. Functional purchasing has become both a concerted choice and an automagical reality. When we can fulfill a purchase from anywhere as quickly as we can type (or verbally state!) the product's name, our store brands become pushed into two corners: convenience or emotion.

Notably, I did not say experience, as it is a strategic tactic to get to the gold — which is emotional currency. As shoppers, when we have good experiences, emotions are unleashed that trigger positive buying and loyalty behaviors, which ultimately lead to revenue. If your brand can't compete against **Amazon's** chokehold on convenience — and most cannot — it is with *this* approach that retailers win.

So, retailers, how can you best lure customers off their couches and phones and into your stores when the alternative is an easier option? With a mindset shift. You must change your view of the store from a place of transaction to that of a destination. Our firm calls the playbook for how to do this *Destination Retailing*, and if you think about it, it makes all the sense in the world.

The definition of the word '*destination*' is this: '*a place that people will make a special trip to visit*.' Now, as a consumer, think about the attributes that make a place worthy of a special trip. You look forward to it. The people are pleasant. It makes you feel good to be there. You linger and embrace the many sensory inputs. You have things within it that make you smile, if not outwardly, certainly inwardly. You like to share the experience of it with others. You have memories surrounding it. You plan the day and time during your busy schedule to fit it in, then protect that time slot. Before, often during, and sometimes after, you spend time in its social and marketing channels — perhaps even contributing to them. You get the picture. It becomes something of *meaning* to you versus a commodity.

This begs the question, '*as a retailer, how can I evolve from transaction to destination*?' From our purview, it means redesigning the experience from how people *think about* the store to how people *experience* the store. In our research of retailers that have built a successful store in today's connected age, we've found that the experience design must be rooted in seven fundamental categories. The age-old 4 P's (Product, Price, Place and Promotion) no longer apply. It's time for a new model.



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1. **Perception:** Your brand, your promise and what people think and feel about it. Do what you can to influence perception of your brand.
2. **Presence:** Where you want your brand to be experienced and how those experiences should be manifested.
3. **Place:** The physical space — and the value it holds for your shoppers — emotionally, physically, socially and transactionally.
4. **Product:** Having the right products in stock at the right price, all of which should line back up to your brand proposition and shopper expectations.
5. **Pixels:** Technology-based, shopper-focused innovations that solve friction points and/or set you apart uniquely.
6. **People:** Ever-important within stores, how to ensure that caring, authentic, helpful people who truly want to be there are well-trained.
7. **Prompts:** A bigger idea than promotions — and on purpose. After the visit, it’s important to give people reasons for returning. Paying attention to their habits and understanding how to become the default choice to fulfill an emotional, not just a logical need.

Theme parks, the Founding Fathers of the experience destination concept, have a North Star that guides all they do — the suspension of disbelief. If one thing makes a visitor fall into a negative ‘reality space’, they lose them. They orchestrate every single thing, person, visual, feeling and experiential space to protect the dream bubble that they want their guests to float within.

As we move into the ongoing evolution of stores that strive to become destinations, think about this idea in relation to your retail CX strategy. What is your brand’s promise and how does it manifest in the minds of the people that you want to shop you and love you? Where are you causing them to fall into disbelief? How can you follow the Seven P’s to seal the gaps and bulletproof yourself against the siren song of convenience? To create an experiential store that matters, your answers are your path forward.

Shoppers are looking for a fresh approach to retail. By imparting a meaningful promise, a thoughtful space, a uniquely engaging experience, a hospitable interaction and a measurable impact, you’ll be cracking the code for what’s next in retail.

RETAILERS' GOAL: CREATE 'IRRATIONAL LOYALTY' IN CUSTOMERS AND EMPLOYEES

DEB GABOR, CEO, SOL MARKETING

Retail TouchPoints (RTP): *How have ideas about branding changed in recent years?*

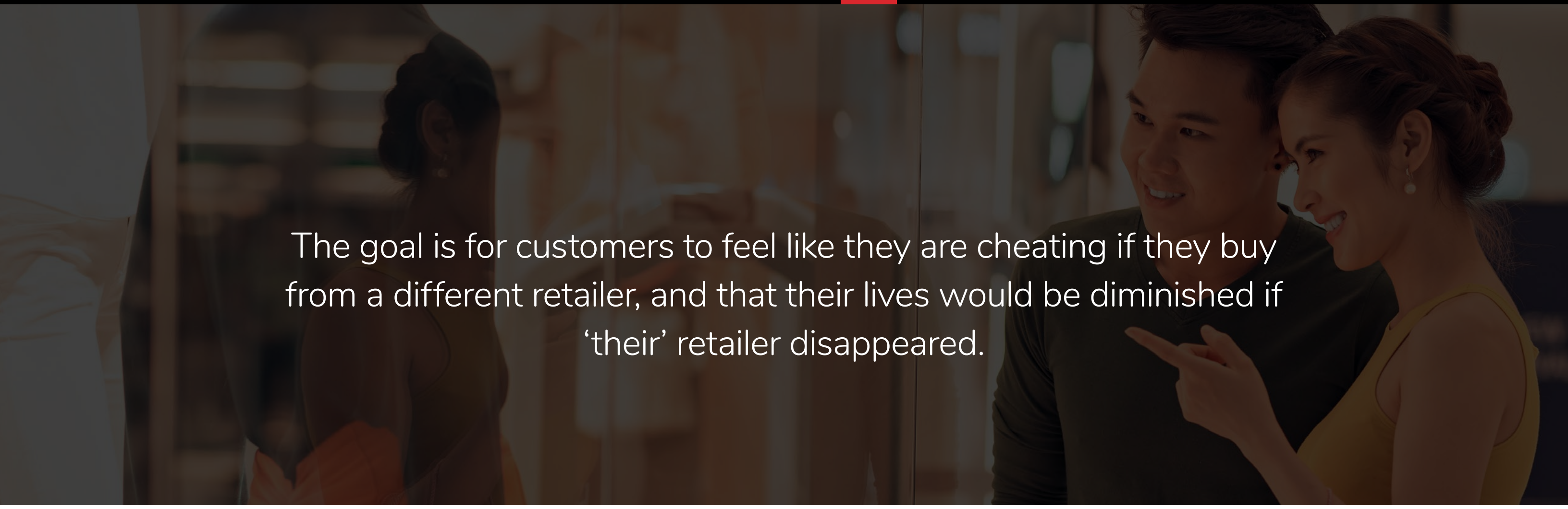
Deb Gabor: The whole world of branding really changed starting with the leadup to the 2016 presidential campaign. We all got a lesson in how branding can connect with people deep in their hearts, and get them emotionally riled up. The Trump campaign was a master class in branding. Because he is such a divisive individual, that caused all kinds of corporate brands to also show up and express their own values and beliefs in a specific way. As a person that has observed branding for 30 years, I've come to the idea that branding is about connecting with people via their values and beliefs.

The whole tone of marketing has really changed, and retailers need to think of themselves as a brand — **not just a vessel for people to buy things**. Where people shop is becoming as important to people as what they wear, eat and drink, so it's increasingly important for retailers to start thinking of themselves as both a brand and an experience. Stores can bond with customers in a way that no other entity can, and I'm excited to see how, in the 'second coming' of branding, retailers will align with their customers' beliefs and values.

RTP: *What are some ways these new ideas about branding are affecting retail?*

Gabor: Take gun control as an issue: **DICK'S Sporting Goods** got into the national conversation when they decided to no longer sell firearms. There were people who were critical of that move, but I saw it as a brilliant strategy. They could talk about moms with kids going to DICK'S, not to buy guns but to buy shoulder pads, kneepads and soccer balls.

Or take **lululemon**. I was recently at the promenade in Santa Monica and there was a line out the door for people to get to the cash register. It wasn't because they were offering great deals, but because it's a terrific brand that people bond with very strongly. People are willing to pay $120 for a pair of leggings because they like what it says about them as a person. Also, the shopping experience there is completely unique, which bonds them in this deeply emotional way.



Sephora is another example. Any day of the week, their stores are packed with people all over the store, in front of mirrors, trying on makeup. They have knowledgeable salespeople who are, in essence, being the brand. Compare that to a department store, where everything is behind glass and there are women in lab coats spritzing you with fragrance — as opposed to 'come in, engage and play.' That's how brands become part of the emotional fiber of their customers' lives.

What I hope will continue to happen for retail is that they identify the customers that are **the most highly predictive of their success**, and then figure out how to bond with them so that they become irrationally loyal. The goal is for customers to feel like they are cheating if they buy from a different retailer, and that **their lives would be diminished if 'their' retailer disappeared**.

RTP: ***How do you see these ideas play out in terms of the retail workforce?***

Gabor: The workforce is truly the linchpin. It's extremely hard to recruit and retain good people, but having a focus on the culture and the brand will help retailers attract the best talent. Additionally, the first step in ensuring that a retailer's brand vision, mission, purpose and values plays out for the customers is making sure it works for the employees. Have an organizational culture — even for the transient/occasional retail workforce — that is focused on creating that 'irrational loyalty' with customers.

RTP: ***What is one thing retailers can do to upgrade their employees' experience?***

Gabor: Product knowledge, product knowledge, product knowledge. The best experiences are the ones where you have knowledgeable, engaged salespeople. **Best Buy** is the pinnacle. Their sales associates can engage in an intelligent conversation with customers, create added value, and fulfill instant gratification needs in a way that **Amazon** never can. When people can touch something and see how it works, that's not only a great bonding experience for the shoppers. It's also true that **offering something of value can be fulfilling for the associates**.

HOW ACCURATE WERE MY 2018 PREDICTIONS?

ASIF KHAN, FOUNDER AND PRESIDENT, LOCATION BASED MARKETING ASSOCIATION

I'm taking a look back at five predictions I made last year to see whether my crystal ball was clear or cloudy, and then putting forth three predictions for 2019.

Prediction No. 1: Local Search Will Be Dominated By Images And Voice

Virtual assistants such as Google Now, Cortana and Siri have shortened the path between users and the answers they need. Voice searches now make up to **20%** of mobile queries (Google Research). This, coupled with image-based search, will put new challenges in front of SEO experts.

RIGHT: By all accounts, voice-enabled search is on a rapid rise. "By 2020, **50%** of all searches will be conducted via voice," according to ComScore.

Prediction No. 2: IoT Is Set To Re-Invent Retail

Just as smart devices are being increasingly adopted in homes, IoT will make more of a mark in retail. The use of sensors and tags on every item will enable retailers to more accurately monitor the movement of goods, improve inventory management and achieve efficiencies rarely seen before.

NEUTRAL: While many retailers have begun to deploy sensors in their stores, more work is needed to bring smart lighting, flooring, mirrors, etc. into the mainstream. I will hold this over as something to watch in 2019.

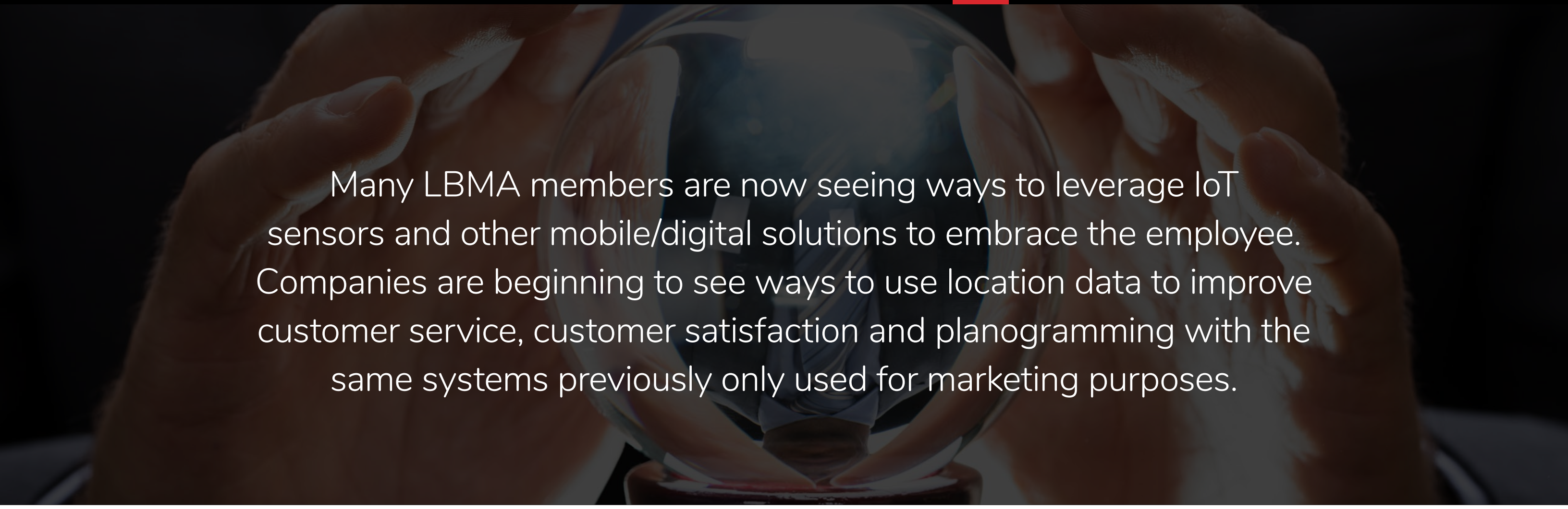
Prediction No. 3: The Continued Explosion Of Bots

Bots will be instrumental in achieving personalization and anticipating what the customer prefers. Bots also will continue to be used for customer service, responding to customer inquiries and being incorporated into chat facilities on retailer web sites.

NEUTRAL: Bots have begun to see a real rise in deployment, especially when coupled with AI platforms. However, there is much more work to do in blending the automation of bots with the need to understand human emotion and intention.

Prediction No. 4: Augmented Reality Finally Has Its Day

We've already started to see some retailers using augmented reality to engage customers emotionally and enrich their experience. AR combined with "location-based" services also is making headway, by allowing retailers to push their locations onto the user's smartphone using a 3D map, or helping customers find stores or particular items in the right size and color.



Many LBMA members are now seeing ways to leverage IoT sensors and other mobile/digital solutions to embrace the employee. Companies are beginning to see ways to use location data to improve customer service, customer satisfaction and planogramming with the same systems previously only used for marketing purposes.

RIGHT: Many retailers and brands launched campaigns leveraging AR and even VR in 2019. In particular, we witnessed a huge amount of engagement on consumer products such as alcohol, product packaging and even in clothing sales.

Prediction No. 5: The Rise Of The Connected Car
As we wait for the day when we are all riding around in self-driving cars, the time is now for the connected car. General Motors just announced Marketplace, a solution that combines mobile payments with online shopping/purchasing directly from the vehicle. Pull into the gas station and fill up — let the car pay for that. Order pizza on the way home — your car will let you order and pay for it. Other manufacturers won't be far behind in 2019.

NEUTRAL: Despite recent activity, I feel the retail/brand community doesn't really understand the potential of the connected car yet. I expect more education on the marketing/advertising and commerce opportunities in this area in 2019.

What's In Store For 2019?

1. Omnichannel Alignment
At the Location Based Marketing Association, we have always seen location data as a way to unite the silos of traditional and digital media. We expect this goal to be realized further through "physical retargeting." By collecting data about the movements of people in the brick-and-mortar world, we can store this data to use for more personalized/localized retargeting online.

2. Workforce Management
While much of the technology we work with has been oriented around influencing the consumer, many of our members are now seeing ways to leverage IoT sensors and other mobile/digital solutions to embrace the employee. Companies are beginning to see ways to use location data to improve customer service, customer satisfaction and planogramming with the same systems previously only used for marketing purposes.

3. Movement Science
As location-based marketing matures, we will start viewing it as more than just a marketing/advertising medium and more as a digital citizen engagement solution. The availability of location data and its interpretation can increasingly be seen as "movement science." Whether we use this data for influencing purchase decisions in retail or leveraging the data to optimize efforts in a political campaign, location data is now squarely in the center. Look for this trend to explode in 2019 into all areas of our daily lives.

WHERE IS AI HEADED IN RETAIL MARKETING IN 2019?

TIM LEFKOWICZ, MANAGING DIRECTOR, AARETE

In order to figure out where artificial intelligence (AI) in marketing might be going in 2019, it's instructive to see where we've been with the technology in the past few years. Data and digitization have allowed targeted marketing campaigns to evolve to the point of focusing on a well-defined customer type, making fairly well-matched offers to them and retrieving some of their feedback.

But too often these campaigns miss with consumers. The cost of marketing to the wrong customer, especially in retail, has meant losses in sales, lost loyalty and a confused target market. A mistargeted marketing campaign can alienate a swath of a retailer's most valuable customers, whether current or potential — and for retailers, that is very bad news. Disgruntled recipients of too many not-quite-right marketing offers have proven that they don't want to maintain a relationship with the retailer responsible, much less become their brand ambassador or social media amplifier.

Retailers have gotten the message, sometimes painfully, that data analytics can often hold the key to achieving successful personalized marketing. Failing to understand, use and continually update data analytics in a personalized marketing model can lead to a range of issues, from excessive spending to a lack of interested potential customers. Companies need to be deliberate and exercise caution while fine-tuning their brand awareness strategies in today's diverse, digitally driven market.

While using data is now considered table stakes in retail marketing for companies both large and small, AI's presence has upped the ante considerably. The example of **Amazon's** machine learning capability, used to analyze internal and external purchases as well as personal and historical data related to its customers, is by now legendary. Amazon Go brick-and-mortar storefronts do not operate solely on artificial intelligence, but AI technology — developed online over decades of amassing, storing and analyzing customer data — has played a critical role in building Amazon's revolutionary physical store concept.

In 2019, certain areas are currently more thoroughly primed for positive change using AI than others. The broad applications made possible by thinking computer systems can yield beneficial results in a variety of different circumstances — but as I see it, in the near future, in-store customer behavior tracking is one of the most promising areas for AI. By observing in-store actions through footpath tracking, retail marketers can optimize the customer experience by repositioning product displays and overall store organization, tailoring them toward products of highest interest.

Disgruntled recipients of too many not-quite-right marketing offers have proven that they don't want to maintain a relationship with the retailer responsible, much less become their brand ambassador or social media amplifier.

We also see facial recognition — definitely a more controversial use of AI — as an area that holds great promise for 2019. Even though some customers are hesitant to participate in facial recognition due to privacy concerns, this high level of customization is a game-changing experience that can set retailers apart from their competitors. Retailers that invest in this area of machine learning can benefit by identifying loyalty program members as soon as they walk into the store, and offering them uncannily, intuitively personalized service and promotions.

It bears repeating that marketers need to deeply understand technology, and how they are using it, in relation to their customer base. They constantly need to make informed decisions that will create some magic in their customer interactions, making these encounters mutually beneficial while ensuring that they do not push away their target market, actual or potential.

As this relates to facial recognition, one potential approach to dealing with this challenge is to develop an opt-in program for facial recognition that rewards customers for trying it, and allows them to provide consent to store their information in a retailer's database.

In the coming year, winning marketers will be the ones that can intelligently consider, compare, utilize and improve the use of AI in various applications. AI's potential is just about limitless — whether it's used to increase basket size online or create personalized in-store experiences. Success or failure in harnessing it will ultimately determine who wins in the marketplace.

The near term will prove that the costs of marketing to the wrong consumer are both clear and substantial in retail. Focusing on current and prospective customers and leveraging big data and analytics tools will help retailers make the right marketing decisions and ultimately connect with the right customers.

2019 PREDICTIONS: SUSTAINABILITY, PLUS PRACTICAL TAKES ON EXPERIENTIAL RETAIL

RICHARD SHAPIRO, PRESIDENT, THE CENTER FOR CLIENT RETENTION

Retail TouchPoints (RTP): ***Do you think 2019 will be a big year for the circular economy and sustainability, and if so, why?***

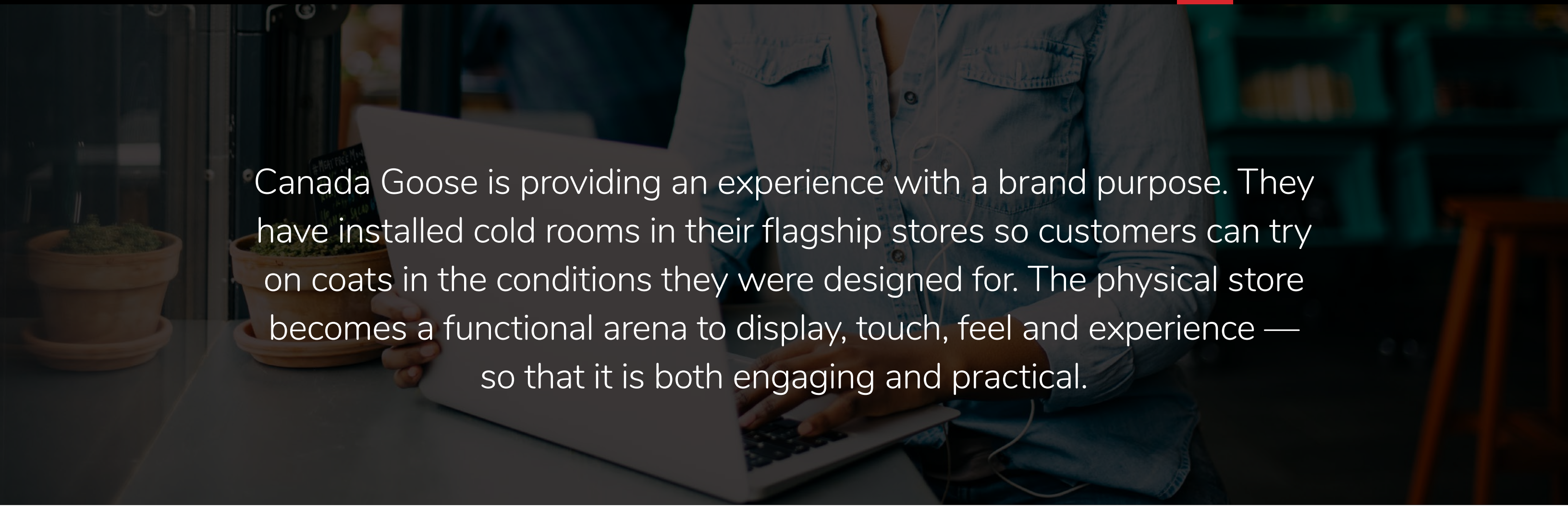
Richard Shapiro: More than **70%** of Millennials are troubled about climate change and agree that humans should take steps to slow or stop the cascading effect of global warming. While concern about the environment is not new, retailers are beginning to change their policies to demonstrate their commitment to the circular economy and sustainability. Take **Patagonia**, the cultish outdoor clothing chain that has championed Earth-friendly practices and policies for over 30 years. According to CEO Rose Marcario, Patagonia 'wants everyone to become radical environmentalists by keeping our stuff in use longer.' Retailers with their eyes open won't need a degree in climate science to know which way the wind blows.

RTP: ***What's behind the trend toward more personalized e-Commerce, and what are its overall growth prospects in 2019?***

Shapiro: Historically, e-Commerce has been synonymous with no, or limited, human contact. As we enter the channel-agnostic era, every touch point needs to embrace the personal touch. Sites like Jetblack are 'a new shopping service that combines the convenience of e-Commerce with the customized attention of a personal assistant.' A member simply texts their shopping request and Jetblack goes to work, delivering the appropriate merchandise within two business days — just 24 hours for popular items — at no additional charge. The underlying system reportedly combines the skill and knowledge of expert human buyers with the speed and precision of AI, and aims high to satisfy the unique needs of each member customer. Technology can only make educated guesses about what consumers might want to purchase; a human can listen to another human and select the perfect fit.

RTP: ***Can cashierless checkout expand beyond the convenience sector, and if so, what might be some of the impacts?***

Shapiro: As **Amazon** expands its Amazon Go chain of self-service convenience stores, dozens of startups are competing with established firms to master and lead this potentially game-changing retail model of cashierless checkout. Retailers, as other business sectors, are always looking to reduce costs, and one of the budget items often selected is labor. Self-serve and cashierless checkout also makes sense for drug and grocery-related retailers, where the items being sold are commodities. While I'm sure luxury retailers will never implement cashierless checkout because they want to provide a superior customer experience,



there will be other retailers between the categories of convenience and luxury/high touch that will experiment. In the near future, the technology might provide retailers with a choice of which customers are going to use cashierless vs. employee staffed counters, based on the individual consumer's preference and shopping history. There are always some people that will prefer not to engage, and a cashierless option might be the perfect choice.

RTP: ***You've noted the struggles of traditional big box and department store retailers. If you had their ear, what advice would you give to the CEOs of these companies?***

Shapiro: When I read retail trends, listen to CEOs on business news show and study recent research, it's about technology. Go to the NRF Big Show exhibit area and there is one technology company after another. Rarely do you hear a CEO say that this year our focus is educating our sales associates on how to create an emotional bond with the customer, current and prospective. My advice: **hire people who like to help others; that is the basic element of customer service**. Train associates to be curious and find the story behind the purchase. Understand that customers are people first, and customers second. The sales force, the people on the ground, continues to be the most important and effective competitive differentiator.

RTP: ***Any other trends you see as important/notable for 2019?***

Shapiro: Retailers are focusing in on their most loyal customers via secret apps and paid loyalty programs. Many B2B organizations fall within the 20/80 model — **80%** of their revenues come from **20%** of their top customers. Retailers like **Macy's** have recently said that **46%** of their revenues derive from only **9%** of their customers. Pay attention and reward those super buyers.

Retailers are experimenting with experiences. Quality outerwear retailer **Canada Goose** is providing an experience with a brand purpose. They have installed cold rooms in their flagship stores so customers can try on coats in the conditions they were designed for. It's like a walk-in freezer: cold inside but warming the prospect up through a very cool experience. The physical store becomes a functional arena to display, touch, feel and experience — so that it is both engaging and practical.

AI'S OPPORTUNITIES ARE BOUND ONLY BY OUR IMAGINATION

JERRY SHELDON, VP OF TECHNOLOGY, IHL GROUP

Artificial Intelligence (AI) traces its roots to 1956, yet it remains the technology I'm most bullish about heading into 2019. I define AI as retail technology that can imitate human intelligence.

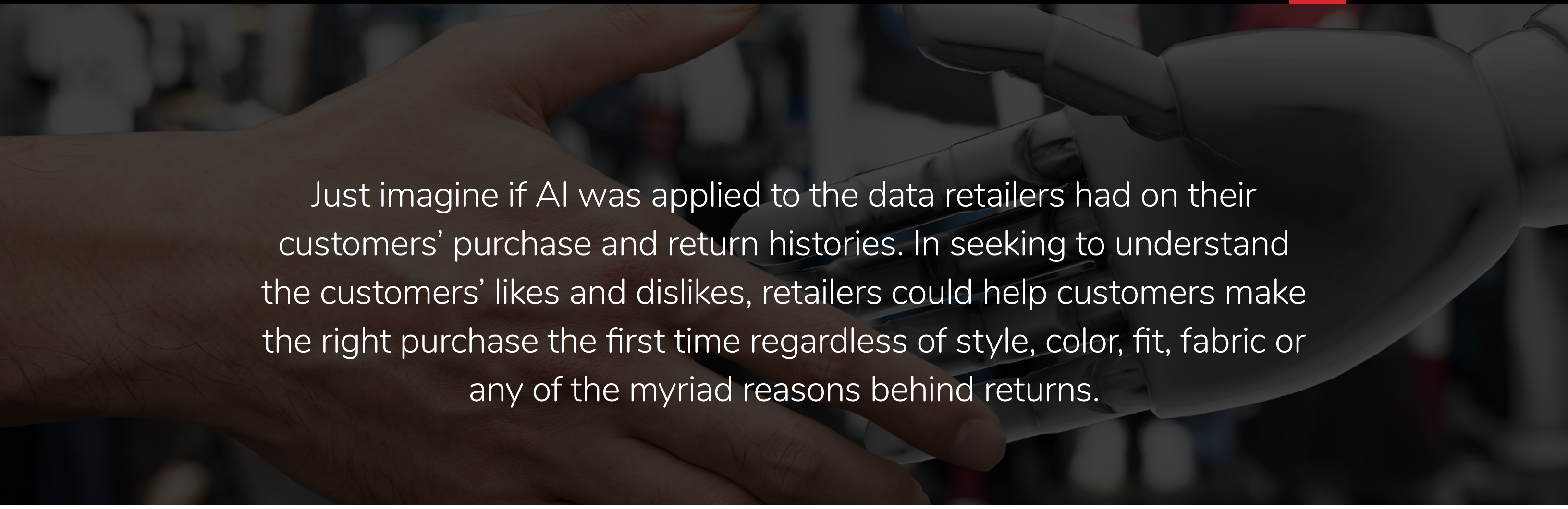
Retail technology typically follows a gradual adoption path. But with AI, we're seeing the possibility of a once-in-a-decade type of transformational opportunity, not unlike what we saw with price optimization over a decade ago. This rapid adoption will have several key drivers, the most important of which is the need for retailers to have their customers' in-store experience more closely match the experience they have when shopping their online store.

The personalization of the in-store shopping experience, coupled with enhanced stock availability and inventory visibility, will narrow the gap between the two customer experiences significantly. Enabling this will be the existence of relatively cheap CPU power, enhanced bandwidth to and inside the store, improvements in edge computing, IoT and enhanced data aggregation. When combined properly, these technologies can provide greater insights more quickly from existing data streams.

AI is advancing rapidly. Just last week, I read an article about how an AI-enhanced program created a new and creative chess strategy heretofore not seen from other players. The article suggested that the program incorporated "human-like intuition," which means we may be on the cusp of AI providing original and creative thought, aspects of which are both immensely exciting and downright scary.

One exciting application comes from our research on Enterprise Order Management Systems. We identified shipping optimization — the ability to deliver an item from source to destination while meeting factors such as customer satisfaction, product location and transaction profitability — as a key differentiator. Imagine the power of AI applied to retailers' current capabilities. A couple of vendors are just beginning to explore this; for the remaining vendors, it is one of our first points of recommendation for product enhancement.

Another area where AI might offer benefit is in returns, one of the primary challenges to profitable e-Commerce. While e-Commerce growth continues to be tremendous, there has been very little discussion about the negative impact of returns on e-Commerce profitability. Surveys suggest that anywhere from **30% to over 50%** of all items purchased online get returned, yet in-store return rates are a fraction of this. When free shipping is offered both ways, it puts serious pressure on the profitability equation.



Just imagine if AI was applied to the data retailers had on their customers’ purchase and return histories. In seeking to understand the customers’ likes and dislikes, retailers could help customers make the right purchase the first time regardless of style, color, fit, fabric or any of the myriad reasons behind returns. There is a huge opportunity here, and one I believe AI has the potential to solve at scale.

We believe the greatest opportunity for the proliferation of AI occurs when it is embedded in the application and transparent to the end-user. We’ve heard compelling stories of AI used in chatbots supporting call centers, merchandising recommendations and suggestive selling.

A leading U.S. pizza chain partnered with HCL Technologies to implement one of the more interesting AI applications. The chain was experiencing very inconsistent pizza quality, so their team created a methodology to “grade” the pizza as it came out of the oven using cameras and a high-performance numerical computational framework. The chain allowed the program to learn; and it could then compute a minimum acceptable scoring level for each pizza.

Through this implementation, the pizza chain experienced a significant increase in customer satisfaction scores, which led to increasing sales and profitability in those stores that had previously experienced quality issues. In the process, the chain created a tool to deliver a consistent level of quality to customers. Truly, AI’s opportunities are bound only by our imagination.

For the immediate future, I believe we’ll see the primary adoption of these technologies by larger retailers. This isn’t driven by cost. Instead, it’s driven because many of the leading AI vendors are focusing on applications and ROI models more heavily geared toward larger clients. We’re excited to see where this will go throughout the retail value chain, but we also must include a cautionary note. As we approach this area of original thought, we must make sure that proper constraints are in place so as to avoid a modern-day version of the 1983 Matthew Broderick movie *War Games*.

THREE RETAIL-TECH TRENDS TO WATCH IN 2019

DEBORAH WEINSWIG, FOUNDER AND CEO, CORESIGHT RESEARCH

In 2019, more retailers will seek technology vendors and startups that can help them build greater operational efficiencies, provide better experiences to shoppers and improve product offerings. We expect retailers to:

- **Deploy artificial intelligence (AI) across their operations** in order to yield improvements in offerings and operations, ranging from communications to inventory management;
- **Tap startups that can contribute to new product development,** provide service improvements and drive efficiencies; and
- **Create smarter, shorter and more responsive supply chains** that blend nearshoring and onshoring.

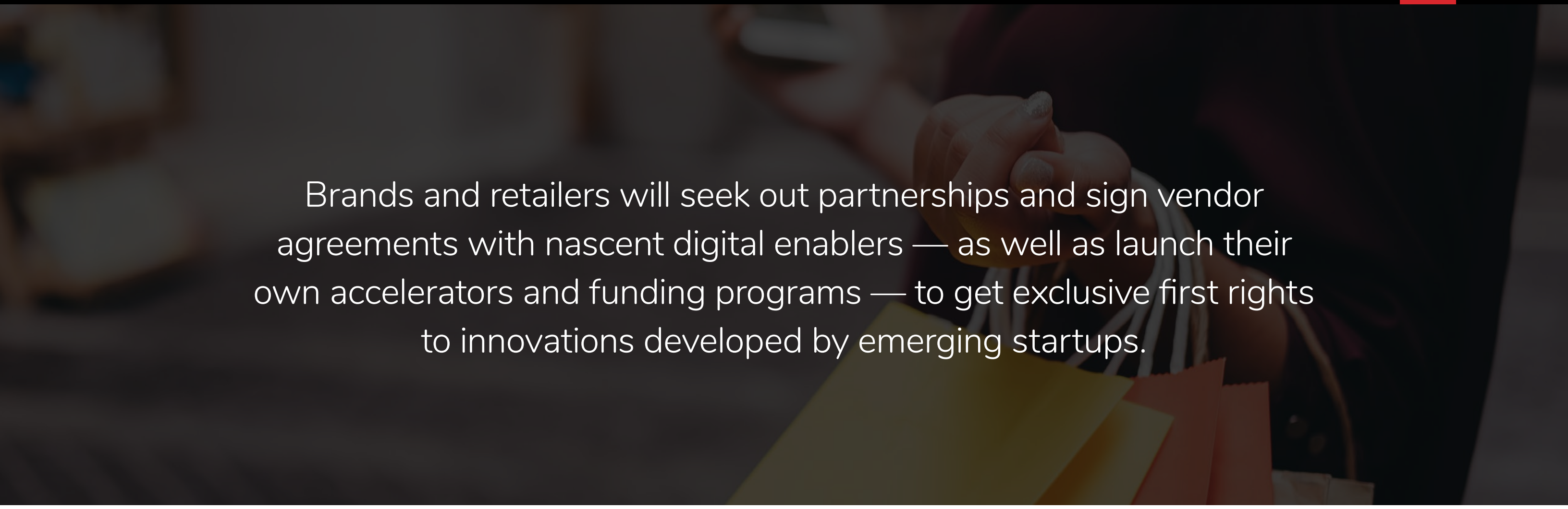
Retailers Will Deploy Even More AI

AI will cement its position as the preeminent new technology and the industry's leading technological enabler. More retailers will turn to AI — and to vendors of services based on AI — to help them make better decisions regarding inventory and pricing, communicate more efficiently and effectively with customers, and personalize product offerings.

In our proprietary CORE framework, we identify four major areas of opportunity for retailers to use AI to improve their businesses: communication (which includes personalization), optimization of pricing, rationalization of inventory and experiential retail.

Startup Partnerships Will Fuel New Product Development, Digital Improvements And Operational Efficiencies

Established brands and retailers will increasingly lean on startups to provide the digitalization expertise needed to compete with online-native rivals. Though we expect to see further acquisitions, this trend will extend beyond outright purchases. Brands and retailers will seek out partnerships and sign vendor agreements with nascent digital enablers — as well as launch their own accelerators and funding programs — to get exclusive first rights to innovations developed by emerging startups.



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We expect to see a flurry of activity concentrated on startups that can contribute in specific areas, including:

- New product development, especially in categories such as consumer packaged goods and beauty;
- Digital service improvements, with a strong emphasis on customer touch points, including payments; and
- Operational efficiencies such as productivity and logistics.

Supply Chains Will Switch From Lines To Loops

Retailers will call on technology vendors and product suppliers to help rebuild supply chains into smarter, more flexible and more responsive models. In industries such as apparel, the sourcing pathway will shift from a traditional, planned, linear chain to a digitalized, reactive, feedback-driven loop. Greater nearshoring and onshoring will enable retailers to add responsive capacity, and the implementation of technologies such as 3D design and sampling will dovetail with these efforts to help drive speed to market.

Meanwhile, a sustained increase in accessible data — and the growing ecosystem of vendors that can turn data into insights — will increasingly support downstream decision-making.

Automation will enable the incremental reshoring of some production, as the unit costs of domestic production will come to look more favorable. The accelerated rollout of automated, on-demand and limited-edition production, 3D printing and point-of-sale customization will add further flexibility.

In short, in 2019, fewer of the products shoppers buy in U.S. stores and on U.S. web sites will have been shipped from a Far East factory a few months beforehand.

VOICE SHOPPING JUMPS 3X IN HOLIDAY 2018, RETAILERS MUST PREP FOR MORE IN 2019

Q&A WITH KATRIN ZIMMERMANN, MANAGING DIRECTOR, THE AMERICAS AT TLGG

Retail TouchPoints (RTP): ***What technology do you expect to be the biggest disruptor within retail in 2019?***

Katrin Zimmerman: There was still a lack of personalization throughout retail in 2018, and retailers will much more strongly drive that in 2019. It's a have-to piece, a necessity for brands to engage in and build into, and from a backend perspective that's still highly difficult to do. Hopefully, we'll continue to see reinvention in how loyalty programs can drive more transparency and personalization in an omnichannel environment.

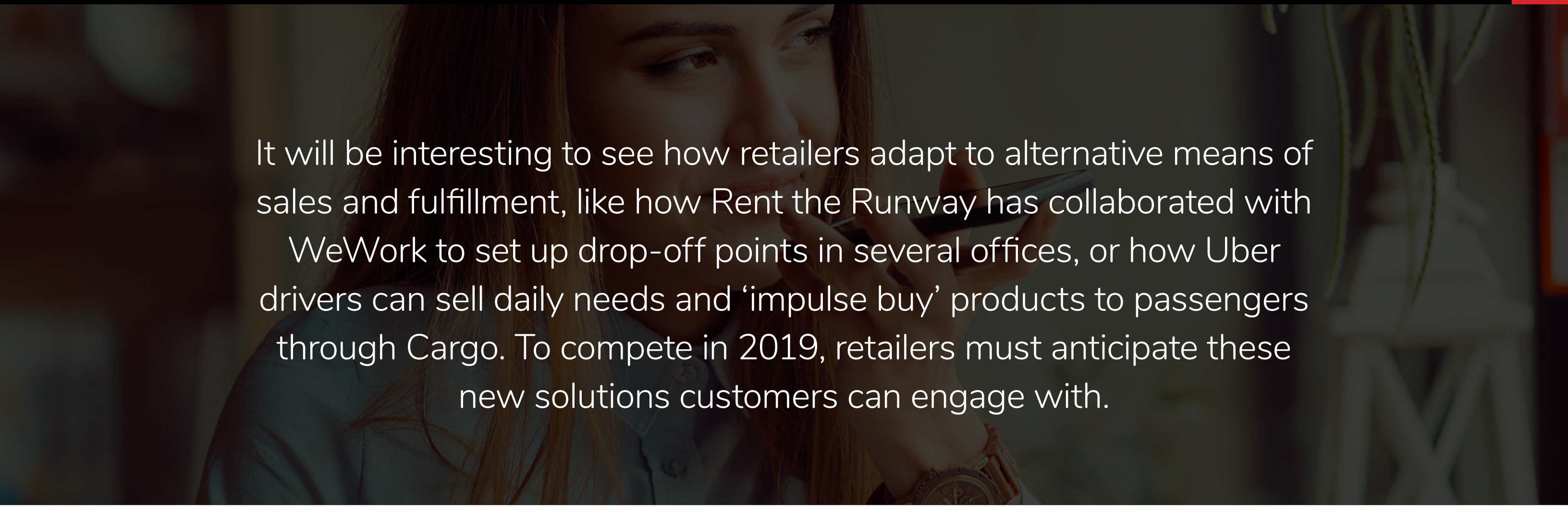
Potentially, one trend that will become more imminent in the U.S. is voice, with the stronghold of Alexa and its facilitation of the gifting experience throughout this holiday season — **Alexa voice shopping tripled during the holiday.**

It will be interesting to see how voice is evolving in the convenience space, because the touch point is owned by one particular retailer, and that retailer is one of the few driving a strategy through that channel. Retail significantly changes through that channel since there's no visual component — we trust the source of the audio to give us the optimal answer.

We'll have to watch for how retailers react if **Amazon** decides to sell certain private label products through their own channels only. There was a time when you would order batteries on Alexa and Alexa would only offer Amazon Essentials, there wouldn't be any other alternative to it. We can anticipate that other retailers will look in similar directions to offer voice strategies because the margins would be considerably higher.

RTP: ***How do you think retailers should be approaching innovation, especially as it gets tougher to stand out from competitors and more sales channels open up?***

Zimmerman: It's challenging and probably depends on the size of the retailer. I think it's a combination of testing, experimenting, learning and pushing ideas out there in a way that a flexible organization like Amazon is doing. This trial-and-error environment is definitely something retailers need to look at. The more challenging task for the bigger retailers is to have an organization that can adapt to that change and build solutions that react to the market environment quickly.



A strong investment in customer experience is key, over potential marketing activities.

Retailers must ask: *Does this solution potentially create value, and what could be the biggest context of using it?* This might be a little outside of the box, but look at the interfaces that are moving into people’s lives like Meero or Peloton. They can become a new channel for a retailer that is highly related to that service. Now that people are used to Instagram buying, you can have an in-video shopping experience where you could buy a Peloton instructor’s shorts. Tapping into these newly created touch points can become retail moments, and that creates value from a retail perspective.

RTP: ***Where do you feel most retailers need to improve when it comes to technology, or digital innovation overall?***

Zimmerman: The first step is to look at the data that they can collect from both online and offline sources, from their top consumers, and then look into what could be the new types of services, products and solutions that can come out of the consolidation of both experiences. That might not necessarily be lacking right now, but I’m excited about seeing all this data collection result in additional benefits beyond price reductions.

It will be interesting to see how retailers adapt to alternative means of sales and fulfillment, like how **Rent the Runway** has collaborated with WeWork to set up drop-off points in several offices, or how Uber drivers can sell daily needs and “impulse buy” products to passengers through Cargo. To compete in 2019, retailers must anticipate these new solutions customers can engage with.

It feels to some degree, particularly when we look at the startup world and the more digitally born brands, that when they start brick-and-mortar businesses, they’re redefining where retail can take place.

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Adam Blair, Editor

Avid theatergoer, intrepid journalist and grammar nag. There's always something new to learn about retail technology.

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