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# The Secrets of Seamless Retailing Success

# There's nothing like online shopping for choice, convenience and ease of fulfillment—right? Not necessarily.

Accenture Research recently conducted a survey that evaluated 15,000 consumers across 20 countries to rank their shopping experiences across channels. The research suggests that consumers may be having second thoughts about the benefits of online shopping. And no one should write off stores just yet.

Accenture Research also found significant signs of a swing back to stores. While almost half of all respondents (46 percent) said they plan to purchase more online in the future, 28 percent said they also

would be shopping more in-store. And in mature markets, the evidence for a shift is especially strong, with 16 percent of consumers now planning to shop more in-store, versus just 9 percent a year earlier.

That's not the only surprise to emerge from our most recent survey of consumer expectations (see back page for research methodology). Fewer consumers now cite "convenience" as the main reason for shopping online. In fact, an overwhelming majority (91 percent) told us that it's easier to complete a purchase in-store

than either online (57 percent) or by mobile (36 percent). What's more, when it comes to fulfillment, most told us that scheduling is more important than speed; and about one-third indicated that they are buying more in-store and carrying home compared to a year ago.

These findings clearly challenge some commonly held assumptions about what consumers want. They also indicate that retailers struggling to provide a seamless, cross-channel customer experience may need to re-think key aspects of their approach.

Accenture's analysis of the trends revealed by our research suggests that the pursuit of five imperatives would distinguish the seamless retail winners:



## 1. Make more of the store

Stores clearly remain a critical aspect of the global shopping experience—but they are ripe for improvement. While 38 percent of our survey respondents wanted a better seamless experience, a similar proportion (29 percent) cited an enhanced experience in-store as a key issue. And for consumers in eight largely mature markets, in-store improvements are becoming especially important: 32 percent wanted some of the convenience of online transferred to the store, versus just 25 percent a year earlier. More than half of all global shoppers want to be able to access services in-store via mobile devices, for example.



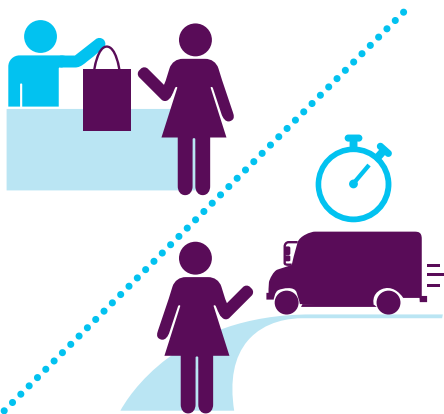
## 2. Combat online fatigue

Shopping online isn't as convenient as once thought. In mature markets, just 48 percent ranked online shopping for convenience this year, versus 56 percent last year. Moreover, in such key sectors as consumer electronics, apparel and home improvement, shoppers are now webrooming (looking online then buying in-store) more than they are showrooming (looking in-store before buying online)—a strong indication that the sheer range of online choice can be overwhelming, and that shoppers often prefer to let stores curate their choices for them. Yet consumers also want online to be made more convenient. They value the ability to reserve a product online before trying it in-store, for example. And the ability to check product availability across channels in real time was cited as the top priority to greatly improve the seamless experience.



### 3. Remember the basics of loyalty

Shoppers still rank a convenient location, product assortment, the best prices and good customer service as the top reasons for remaining loyal to a favored retailer. And more than 30 percent told us that their loyalty has increased over the past 12 months. Free shipping and a better loyalty program would induce some to switch, but overall, the drivers of loyalty have not changed in the digital era. Technology is an enabler of customer loyalty, but not apparently the reason for it. Retailers' understanding of assortment, pricing and promotions across channels—areas where at least half of all shoppers expect consistency—is equally important.



### 4. Maintain flexible fulfillment options

Consumers' attitudes about fulfillment differ across markets. In the US, for instance, just 27 percent of consumers (versus 45 percent last year) now buy more online and have the product shipped to their home—in contrast to Europe, where click-and-collect (buy online and pick up in-store) options are more developed. Attitudes about speed of delivery also vary. In some emerging markets, consumers expect swift, same-day service. In China, for instance, 55 percent of consumers want their product delivered within 24 hours or less. Globally, however, only 41 percent of consumers consider speed of delivery important. Consolidating orders is very important for 70 percent, and at 75 percent value convenient scheduling, more than speed. What's more, convenience trumps price when it comes to returns, with 42 percent of respondents saying they would prefer to return an item purchased online to a nearby store, rather than take the cheapest option. Most shoppers (68 percent) say they won't wait more than five days for free delivery, however.



### 5. Personalize offerings to win trust

Close to 50 percent of global shoppers are happy to provide retailers with their personal information—as long as it results in a truly personalized offering. More than 60 percent would increase their purchases if they were offered a personalized subscription program, for example. While emailed coupons and personalized, in-store offers resonate with a clear majority, similarly, most said their buying decisions would be favorably influenced by advance notice of sales and birthday promotions. And in some regions—notably Brazil—offers via social media were particularly popular.

# Take the next step

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## About Accenture

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## The research

The Seamless Consumer Retail Survey November 2013, conducted by Accenture Research, encompassed 15,000 respondents and 20 countries: the US, Canada, the UK, France, Germany, Italy, Spain, Sweden, Russia, South Africa, the UAE, Brazil, Mexico, Chile, China, Japan, Indonesia, Thailand, Malaysia and South Korea. It also covered seven industry segments: Apparel & Accessories, Consumer Electronics, Department Stores, Discount/Mass, Grocery, Drug stores and Home Improvement. We measured Consistent Experience, Connected Shopping, Customer Loyalty, Integrated Merchandizing, Flexible Fulfillment>Returns, Personalized Interaction, and a Better, Faster and Memorable Customer Experience. The results were analyzed by demographics and retail segment, as well as by country. And some comparisons were made with last year's survey, which covered 6,000 respondents from eight largely developed markets.

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