

# 2018

## Global Retail Trends & Innovations



N° 13 | PRESENTED BY:

**Ebeltoft Group**  
International Retail Experts

**sas**  
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**McMILLAN  
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the retail experts





With more than 25 years of experience in consulting, our practice is centered on retailing. It starts with consumers, who we believe ultimately determine retail success or failure. We go beyond the normal facts and data of the business by developing insights that can be applied to our clients' unique needs and requirements. Our consulting expertise, combined with years of retailing experience, leads to solutions that are both practical and executable. We are the industry experts at interpreting the retail marketplace and converting insights into successful strategies.

**We are unique in the field of retail consulting:**

- **Partner-driven, seasoned and experienced team.** We are uniquely qualified to develop, assess and implement new retail concepts and strategies for retailers and suppliers.
- **Proven processes.** Our consulting practice touches on every facet of retailing, including operations, service, merchandise, real estate, systems, culture, organization, presentation, multi-channel and design.
- **Process built upon ownership.** We partner with our clients using a team process. In the end, we engage with the team to implement our retail knowledge and ensure clients will be able to successfully execute the retail concept and/or retail performance improvements.

McMillanDoolittle partners are objective outsiders who are passionate about retailing. We know of no other retail

consulting firm which can provide such a high level of experience, expertise, commitment and process.

**Services. Our consulting practice is focused in the following areas:**

- **Create winning strategies.** We help create winning strategies for retailers and suppliers to the retailing industry. We are experienced in guiding companies through the strategic planning process to achieve fresh insights and solutions.
- **Optimize the customer experience.** We help companies develop a unique, consistent and sustainable customer experience. Our proprietary analytical frameworks and deep expertise helps clients identify opportunities to enhance and differentiate their ongoing relationship with their target customers.
- **Develop new concepts.** We lead the development of innovative retail concepts, formats and programs. We have developed ground-up prototypes, refined existing concepts and created successful programs, shops and departments within stores.
- **Analyze and improve performance.** We evaluate and optimize retail concepts, strategies and businesses. This includes a feasibility assessment of startups and new concepts, performance improvement for existing concepts and due diligence activities.
- **Intelligence.** We provide critical research, information and insights on the retail industry.

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# Ebeltoft Group

International Retail Experts

We are a global alliance of consultancy companies with members in more than 25 mature and emerging retail markets.

Since 1990, we have helped retailers, as well as suppliers to the retail sector, remain competitive and achieve their goals by blending global retail expertise with our members' local insights.

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

Since its founding, Ebeltoft Group has been analyzing global retail innovation trends and, since 2005, presenting this analysis in our annual publication, Global Retail Trends & Innovations, focusing on emerging trends and the most interesting cases worldwide.

Ebeltoft Group's global studies and publications include:

- Horizontal Retail (2017)
- Services at Retail (2017)
- Global Cross Channel Report (2014)
- Retail Internationalization (2013)
- Global Cross Channel Report (2012)
- NeoConsumer (2011)
- The Trust Factor (2011)
- Environmental Sustainability (2010).

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## Retail Innovation Services

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



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

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

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

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

# Global sponsor of Global Retail Trends & Innovations 2018







## Drive results and enhance the customer experience thru analytics

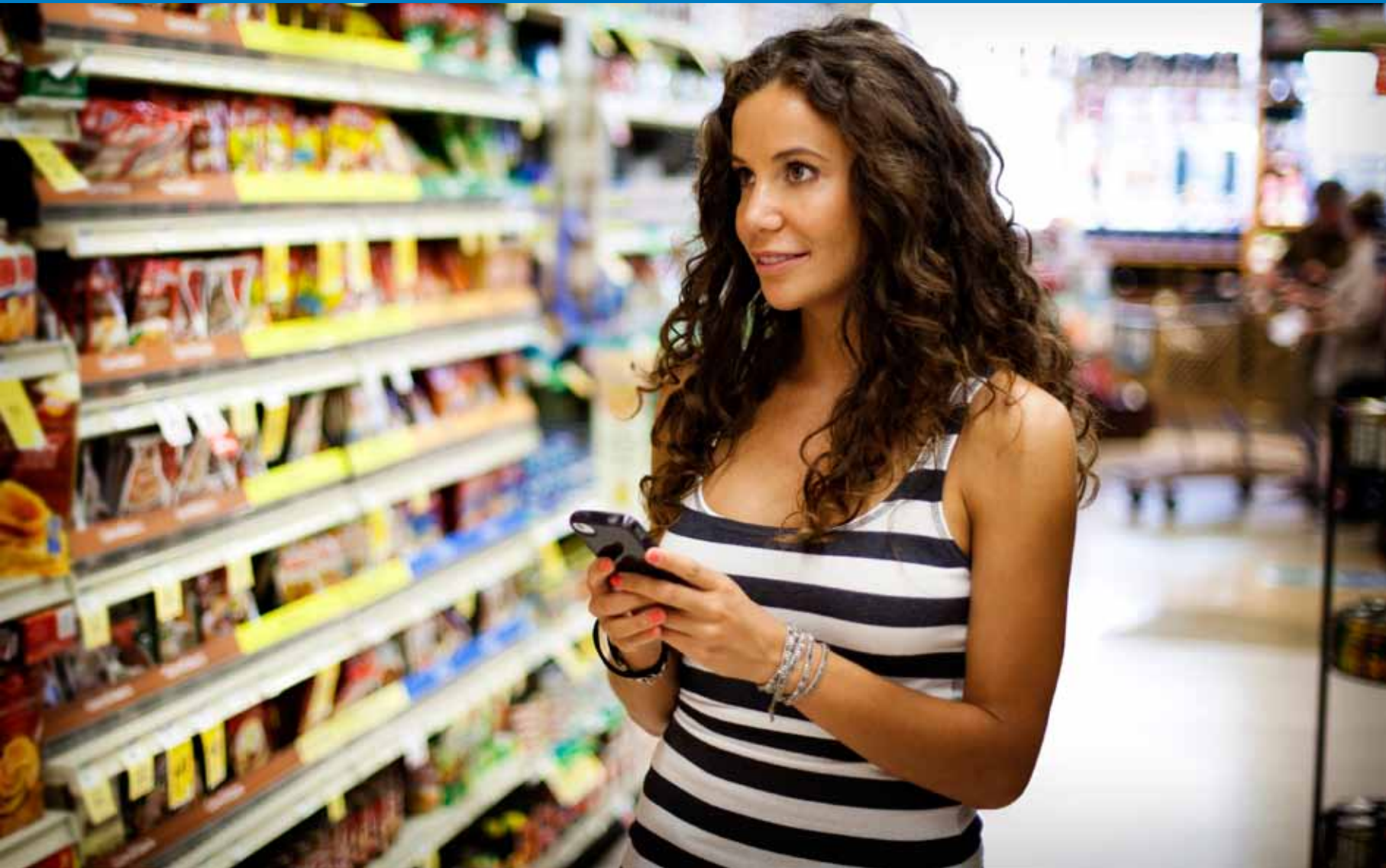
SAS helps you make sense of your data. As a leader in the business analytics software and services, SAS transforms your data into insights that give you a complete perspective on your business. You can identify what's working. Fix what isn't. Discover new opportunities. SAS can help you turn large amounts of data into usable knowledge about your customers.

Retail stopped being just about running physical stores a long time ago. It's been over two decades since the lines between offline and online started to blur. But in recent years, the list of retail possibilities has expanded tremendously, with new players with often disruptive models popping up constantly. This has made the entire retail landscape much more complex than it was in the past. The new reality is that customers are mobile and have more control over the purchasing process – which means retailers must rethink how to use customer data and insights from analytics to know their customers better and improve customer engagement.

You can learn how to bring together all your data to connect with shoppers at every step of the customer journey. Make decisions to satisfy customers who can shop anywhere, anytime, personalized. A better understanding of who your customers are in order stay competitive.

Know exactly what customers want. And make sure they get it.





SAS analytics solutions lets organizations manage interactions along the customer journey in a more personalized and profitable way.

You can

- Efficiently rationalize assortments by becoming more customer-centric
- Predict customer demand by channel and strategically plan key initiatives
- Understand true omnichannel demand and use automated processes to predict sales
- Increase margin potential by understanding historical sales through size or pack optimization

Inspiration and further information:

**Sobeys**

[www.sas.com/retail/sobeys](http://www.sas.com/retail/sobeys)

**DSW**

[www.sas.com/retail/dsw](http://www.sas.com/retail/dsw)

**Levi's**

[www.sas.com/retail/levis](http://www.sas.com/retail/levis)

Read more at [www.sas.com/retail](http://www.sas.com/retail)

SAS® Omnichannel Analytics Powers Retail

# Welcome to the “new” normal

Greek philosopher Heraklit was right 2,500 years ago when he said, “The only constant is change.” It’s certainly true today when it comes to retail. The monopoly of brick-and-mortar-based transactions is history. The launch of online shopping marked a new era in retail, challenging the mindset of traditional retailers and forever changing the expectations of consumers. Voice services, like Google Home and Amazon Echo, and Amazon’s leap into physical retail space set new standards. Today’s consumers are always shopping – even when they’re not. A new normal is born!

Changes are coming fast. The majority of tomorrow’s consumers are digital natives, born in a world where boundaries between digital and physical worlds have vanished. Retailers need to adapt to find their space in this new normal world. They need to be relevant, interesting and meet new expectations.

It’s time to change, to re-think, to innovate.



## THE HOT FOUR TRENDS OF 2018

For more than a decade, Ebeltoft Group has been monitoring brand and store innovations, enabling us to uncover the trends both underlying and emerging in modern retail. Our retail experts around the world join forces to share insights from their local markets that will inspire your ideas to innovate and future-proof your business. We have evaluated over 40 innovative cases from more than 18 countries, revealing four different retail trends, with two sub-trends apiece, to create a detailed big picture of what’s to come.

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# Award-winning innovation case

U.S.A.

**B8ta**



RETAIL DESIGNED  
FOR DISCOVERY

*#b8tatested*



U.S.A.

## B8ta

B8ta is a San Francisco-based retail chain that shows and sells the latest tech products to consumers. The concept brings consumers and product-makers together, allowing makers to test their cutting-edge innovations at physical stores within days of release to gauge consumer interest before investing in a store base. Makers get instant customer feedback and consumers can discover, try and learn about new tech products, which is very interesting for early adaptors.

The unique B8ta business model is subscription-based, with the goal of getting innovative products into physical stores, where customers can see and touch them, keeping B8ta focused on return on investment for sellers. The store does not take a cut of each sale. Other benefits for makers include setting prices, creating their own sales pitch and paying for space only in B8ta stores where they are present.

There are four stores across the U.S. and three Smart Spots inside Lowe's Home Improvement locations.

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### KEY DATA

**Country:** U.S.A.

**Retailer:** B8ta

**Category:** Tech retail

**Format:** Stand-alone stores

**Website:** [www.b8ta.com](http://www.b8ta.com)

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## WHY IS IT INNOVATIVE?

### ► The store helps retail to innovate efficiently

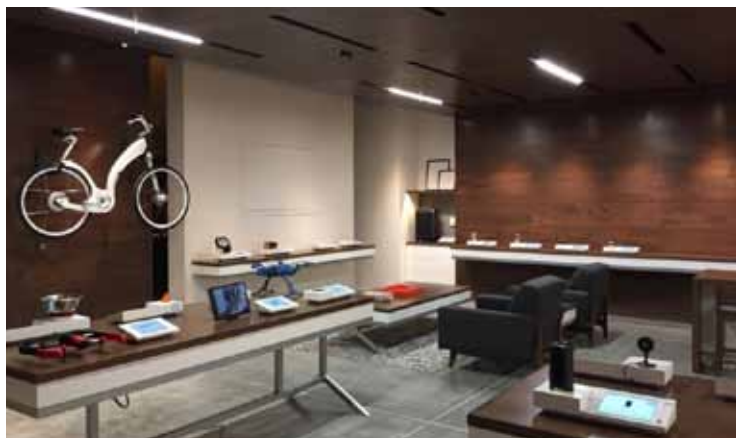
Retail is in transition and retailers struggle with ways to innovate and to be relevant cost-efficiently. B8ta gives innovative and successful product-makers a fair chance to develop themselves and get ready for the real world.

### ► Every store is unique and lifestyle-driven

Stores are designed for discovery and divided into four main categories.

- Home (security cameras, connected-home devices)
- Play (toys, educational products)
- Sense (VR headsets, audio products)
- Move (backpacks, electric skateboards, fitness gadgets)

Each store takes on its own personality based on trends in the area. No two stores are alike and each features different tech products, with merchandise changed monthly.



### ► Employees engage with customers through technology

Employees in the store, known as “B8ta testers,” are notified when customers use the digital screens to purchase products. When a customer is interested in a product and hits “Buy” on a touch screen next to a display device, a B8ta tester is summoned via the Slack messaging app. B8ta employees have access to the company’s Slack sales channels, enabling them to see what customers are trying and buying. Employees take notes on product demos, why customers choose to buy a product and the reason for a product return. The feedback goes back to the product-makers.



## Ebeltoft Group Expert Comment

B8ta is a unique example of how brick-and-mortar is being reinvented to bring exposure to new brands entering the market, without having to invest in a permanent store base. This test-and-learn strategy works more like a pop-up for brands to gauge consumer interest and capture data, without investing further in development.

Data is a key ingredient in understanding consumers and behavior. B8ta brings data and experiences to life by showcasing new and innovative products in a unique space that has become a destination for visitors.

Trend #1

# Smart Shopping

The modern consumer is busy. Millennials, especially, feel busier than ever. Between career, job, school, family time and social life, not much time remains for other chores. Therefore, focus has to be on what consumers value, with “return on time” as the new currency. Consumers look for convenience in the purchasing situation and solutions that both optimize and save time. Smart shopping makes consumer life easier, simpler and more efficient, without compromising the quality of products or the shopping experience. Smart shopping is often driven by the use of smart technology and an integrated omnichannel experience.

## SIMPLICITY

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**Simplicity** is a key driver for saving time. In retail, it means a simple and convenient offer, often enabled by technology. Focus is on smart in-store solutions that make the buying decision simpler, easier and faster. Optimizing the layout of the store, convenient delivery options, subscription plans, fast check-out systems, easy store navigation, fast tracks and on-the-go food exemplify how the shopping experience can save time for consumers.

## ON DEMAND

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**On-demand** concepts are on the rise, as they offer consumers what they want, when they want it, seamlessly, meaning zero friction in the experience. On-demand services have been popularized by concepts such as Netflix, Uber and food delivery; in retail, the on-demand economy means manufacturing and production upon ordering, resulting in new/fresh products, as well as the opportunity for the customer to influence the product and make it personal and individual.



#1 **SMART SHOPPING** : Simplicity // On demand

Romania

# Bringo

“Uberization” is the key descriptor for Bringo, an extended concept that connects grocery stores with consumers. Bringo facilitates purchase and delivery services (by delivery partners) via a mobile app that is integrated and updated in real time to reflect retailers’ inventory.

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## KEY DATA

**Country:** Romania

**Retailer:** Bringo

**Category:** Delivery services

**Format:** Delivery partner

**Website:** [www.bringo.ro](http://www.bringo.ro)

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## WHY IS IT INNOVATIVE?

### ► Time-saving innovation

Bringo is especially innovative in the way it provides the most precious resource – time – relieving customers of the hassle of daily shopping. The mobile app was launched in September 2015 and gradually increased in popularity. Bringo's retail partners include large retail chains (e.g., Carrefour, Metro, Selgros), as well as smaller networks (e.g., Pronto Express, Agricola, Brot Manufactur), covering a wide network of hypermarkets, specialized stores and pharmacies.

The process is fast and simple. Once the client chooses the store, the app will search for an available delivery partner in a 1-kilometer radius and keep extending outward until one is available. The Bringo delivery partner will purchase the customer-placed order and deliver it to the client in the shortest possible time, usually less than 90 minutes, for a small fee of about 4.5 Euros cash paid directly to the delivery partner.

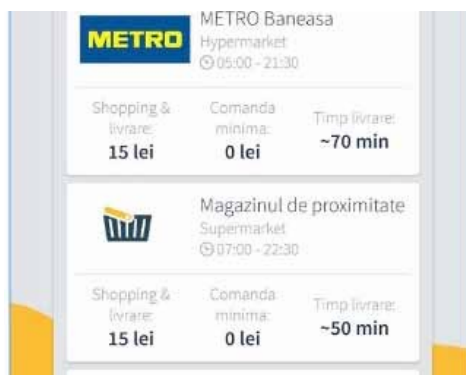
Highlighting smart shopping as the key point of its business model, Bringo's main targets are busy people who are highly educated and open to new concepts which meet their high standards for fast service and

excellent quality. While some customers are still traditionalists in their need to touch or examine products, especially food, most trust delivery services' choices.

### ► End-to-end benefits

While focusing on end-clients, Bringo is also changing the traditional model of employees, giving anyone with a car and a smartphone the opportunity to become a delivery partner with a flexible schedule. Always seeking a competitive advantage, modern retailers reacted quickly to the innovation Bringo brought to the Romanian market, and the network continues to grow.

Bringo is a catalyst in a still-developing e-commerce market in Romania, especially related to the grocery market, influencing and persuading modern retailers to focus investment on this niche. As a proof of success, the second modern retailer on the market, Carrefour, became the main shareholder of Bringo's platform, with 51% participation, promising to deliver more than 350,000 SKUs in less than 90 minutes at the same prices available on store shelves.



## Ebeltoft Group Expert Comment

While online shopping is not a new concept, the ability to shop from almost anywhere, for any type of product, offers immense flexibility to the end-consumer, especially in a crowded city, such as Bucharest. Bringo's platform definitely fits the criteria of "Smart Shopping" by making consumer life easier, simpler and more efficient, without compromising the quality of products, and offering retailers more efficient ways of delivering online orders to their customers.

France

# Decathlon City

Decathlon City is a concept for urban areas, with formats built to be far smaller than regular Decathlon stores, the world's best-in-class sports retailer. Digital is key in this concept. Beyond enhancing customer experience, digital capabilities empower salespeople by providing them with access to rich content about products, an ability to check availability and plan deliveries, etc., so they can focus on merchandise, rather than on show or activation. The concept philosophy sets clients and staff free from low-value tasks, in order to maximize efficiency and commercial value.

---

## KEY DATA

**Country:** France

**Retailer:** Decathlon City

**Category:** Leisure sportswear

**Format:** 500 sqm

**Website:** [www.decathlon.fr/city.html](http://www.decathlon.fr/city.html)

---



## WHY IS IT INNOVATIVE?

### ► Upgraded shopping via tech

Digital capabilities actually improve the customer's pathway efficiency, instead of being just a way to bring a modern touch to the store design. For example, mirrors in the changing room can be used by the customer to ask for other products or sizes.

### ► Employees are empowered

Even more than for customers, digital capabilities are making it easy for staff. Salespeople are empowered with devices enabling access to useful information (order status, delivery planning, stock information, CRM database, etc.). All payments are digital and can be self-service.

### ► Extreme customer service

The time saved thanks to digital is reinvested in customer service. For example, the store opens early to provide free sports/gym sessions to customers.



## Ebeltoft Group Expert Comment

After Decathlon tested several "digital-enabled" concepts, Decathlon City emerged as the most successful. Among the many tests of physical stores, this one is not the most spectacular, but the technology actually improves store efficiency, staff availability and customers' experience. The savings in terms of space and staff time is reinvested in services (training, personal coaching, etc.).

Switzerland

# Welle 7

Welle 7 is a shopping/entertainment/education/work/dining center. It comprises innovative restaurants, shops, co-work spaces, child care, kitchens, a continuing education center and a fitness area. Several services also support and enhance the convenient omnichannel experience.

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## KEY DATA

**Country:** Switzerland

**Retailer:** Various

**Category:** Shopping center

**Format:** Physical store

**Website:** [www.welle7.ch](http://www.welle7.ch)

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## WHY IS IT INNOVATIVE?

### ► Adapted to today's consumer lifestyle

Welle 7's offer is very much adapted to the lifestyle of today's customers. First, the venue is easily accessible by passersby and commuters, thanks to its convenient location next to the capital's main railway station. Providing a place to eat, shop, learn, relax and work, Welle 7 covers almost all important aspects of the lives of today's customers in innovative ways. Examples are the co-work spaces and kitchens for rent, and the child-care area, as well as unique restaurants and an integrated continuing education center.

### ► Omnichannel convenience

Welle 7 offers significant convenience to customers. The Collect Lounge certainly stands as the best example of Welle 7's customer-oriented approach. Online purchases from any retailer can be sent directly there and picked up by the shopper at a convenient time. Moreover, shoppers can try on their purchases in a designated changing room with natural lighting. If they are not satisfied, they can simply return it at the Collect Lounge. Collect Lounge minimizes the risks that can make customers hesitate to purchase online by serving as a secure, reliable and extremely convenient service for customers.



## Ebeltoft Group Expert Comment

Welle 7 is a hub for retail, dining, work, entertainment, education and relaxation. Bringing together these offerings represents an added value for the customer, as it increases the level of comfort and simplicity of shopping. This aligns with Welle 7's services, such as the Collect Lounge, which offer an omnichannel approach to convenience.

U.S.A., Canada, U.K., France, Germany, Austria and Switzerland

# Casper

Launched in 2014, Casper has revolutionized how consumers shop and buy mattresses. The company sells one type of mattress in six sizes for \$725CAD to \$1,275CAD. Purchasing a mattress from Casper is easy, quick and hassle-free, with a 100-night trial period and free delivery in three to five business days. Mattresses are shipped in a box small enough to be delivered by bike courier.

Casper's pop-up store in SoHo New York is a fun retail experience. In Canada, customers interacted with the brand face to face by visiting the West Elm Toronto location or the Casper Cottage Pop-up Shop in downtown Toronto, through Aug. 20, 2017.

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## KEY DATA

**Country:** U.S.A., Canada, U.K., France, Germany, Austria, Switzerland

**Retailer:** Casper

**Category:** Mattresses and additional sleep products, including a pillow, sheet set, duvet, foundation, mattress protector, metal bed frame and dog mattress

**Format:** E-commerce + retail store partnerships, pop-up stores

**Website:** [www.casper.com](http://www.casper.com)

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## WHY IS IT INNOVATIVE?

### ► Research-based perfection

Scaling down the profusion of mattress types, variable qualities and prices into one single, affordable product choice.

Casper's market research revealed that consumers share certain commonalities in what they want in a mattress, including a supportive sleep surface, a cool feeling on the skin and value. Casper set out to design the perfect mattress that would have mass appeal.

### ► Smaller is better

A business model that allows the company to ship a mattress in a box inexpensively, Casper sells mattresses that can be delivered by bike courier.

### ► An innovative trial run

A 100-day trial with an option to return sets Casper apart from traditional retailers, who won't accept bed returns.

### ► Attention-getting messaging

A marketing strategy focused heavily on word of mouth, including an aggressive strategy that plastered a colorful cast of characters across billboards, subway cars and taxis.



## Ebeltoft Group Expert Comment

- Quality and value in the product assortment
- Easy-to-ship boxes
- Customers' ability to return a mattress after sleeping on it for 100 days, if they are not happy with it
- Ability to order online or buy in-store at Toronto's West Elm location and Casper's temporary Toronto pop-up shop through Aug. 20, 2017
- From \$0 to \$500 million in four years

Spain

# Media Markt Digital Store

The regular Media Markt sells home appliances and electronics from a “big box” format (2,000-3,000 sqm) in commercial parks outside the city center. In July 2016, the company opened a new format store, much smaller (250 sqm of sales floor), in the city center, where the line between online and physical vanishes. Omnichannel shopping processes, innovative services and staff expertise are at the heart of this new concept that aims to learn from new, highly connected customers and give back what is important to them.

---

## KEY DATA

**Country:** Spain

**Retailer:** Media Markt (80 stores in Spain; 800 in 14 countries)

**Category:** Appliances and technology

**Format:** Experiential urban store (products, training and services)

**Website:** [www.mediamarkt.es](http://www.mediamarkt.es)

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## WHY IS IT INNOVATIVE?

### ► Omnichannel experience

Multiple ways of browsing and shopping a full range of products in a much smaller sales floor. Customers in-store shop on huge touch screens, as they would online, but can be assisted by in-person experts, mixing the best of both worlds. Payment can be made by card at the screen kiosk, or by cash at a counter. 6,000 smaller items are available in-store to be taken home or delivered; others can only be delivered (e.g. fridges, washing machines, big-screen TVs). When picking up a product, whether bought in-store or online, the customer is served within 90 seconds, thanks to a totally digitalized storage room.

### ► Expertise and interaction

All staff are experts and have specific training to assist customers in this digital store. Also, technology brings new ways of interacting. RFID technology shows info about the product on a screen touched by a customer; and purchased products can be picked up 24/7, thanks to a robot that delivers packages. VR can be tried by customers, who can choose the songs they want to hear while shopping, creating a unique playlist. Kids can bring their drawings to life on a projector wall.

### ► Value-added services

An ongoing calendar offers many workshops about products (basic and advanced), and one-to-one appointments can be scheduled online. There is also a workshop for repairs, and many small items (e.g., phone case, coffee machine) can be customized with any picture.



## Ebeltoft Group Expert Comment

Media Markt is reinventing itself after the boom of online competitors and seems to be doing it right. This digital store combines all the perks of online shopping (speed, convenience, competitive pricing, newest products) with the advantage of shopping in a physical store (expert advice, more than 200 services, training sessions and "wow" experiences). After one year of operation, it seems to be working, evidenced by a reported online sales increase of 300% in the area of the digital store. We expect more smaller city-center stores to open, probably focusing on the omnichannel relationship customers want, more than being a latest-technology showcase.

Singapore

# Autobahn Motors

Autobahn Motors is a car dealership company specializing in selling luxury cars. The idea of the Autobahn Motors building grew from a vending-machine concept, replacing traditional car showrooms and offering a new experience to car enthusiasts.

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## KEY DATA

**Country:** Singapore

**Retailer:** Autobahn Motors

**Category:** Car sales

**Format:** Retail outlet

**Website:** [www.abm.sg](http://www.abm.sg)

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## WHY IS IT INNOVATIVE?

### ▶ Saving space

A car showroom is typically extremely spacious in order to display a large number of cars. In a land-scarce country such as Singapore, Autobahn Motors made efficient use of available space, combining innovation and technology, by implementing the novel model of a luxury car “vending machine.” With four cars at each level, the 15-story building can showcase any one of 60 luxury cars at any point. The building features a high-tech lift system that incorporates an automotive inventory-management system, using an iPad in the reception area, where customers can choose the car they want to look at and test. The automated lift system brings the selected car in minutes.

### ▶ A beautiful showcase

The building stands out from conventional car dealerships and showrooms and immediately captures the attention of passersby, whether they are walking or driving past the building. The full glass panel allows outsiders to see the cars on display inside the building. The cars sold are luxury vehicles, ranging from supercars to classics, which appropriately complements the aesthetic of the eye-catching glass.

### ▶ The buying experience

The buying experience is not a typical “vending machine” purchase. Via a tablet, customers select the specific car they want sent to the showroom. The experience provides the feel of a “glimpse into the future” when buying cars. In addition, theatrical effects, such as dimming the lights and playing the car’s promotional video, create a presentation that is hard to forget, making it harder to say “no” to the sale. This is reflected in the increase in the company’s sales rates since moving from the old location.



## Ebeltoft Group Expert Comment

Traditionally, car dealerships and showrooms involve significant sales interaction with customers, as well as a tour of the cars in the building. With the vending-machine concept, all information related to the specifications of the car are readily available on the iPad, eliminating much of the human contact typical in car dealership sales, which appeals to those who prefer to browse at their own pace. An intriguing twist in the vending-machine concept is the contrast between the less-luxurious, hands-on sales tool and the high-end cars sold in the spectacular building, adding interest to the overall purchasing experience.

Singapore

# Chef-in-Box

Chef-in-Box is an efficient, fully automated smart vending machine that serves fast food, hassle-free. While traditional local Singaporean cuisine often requires a long time to cook, fresh meals are now available quickly from the vending machines in outlets across Singapore. The food-vending machine ensures affordability, accessibility and convenience to accommodate the fast, hectic lifestyles of busy executives and working Singaporeans. Chef-in-Box is a nutritious, low-cost alternative to the rising price of food, at \$3.50-\$5 per meal, and features a menu that changes daily. The cook-chill and cook-freeze technology keeps the food fresh without preservatives, additives or artificial flavorings, ensuring quality, flavor and freshness.

---

## KEY DATA

**Country:** Singapore

**Retailer:** Chef-in-Box

**Category:** Food and beverage

**Format:** Self-service store

**Website:** [www.chefinbox.com.sg](http://www.chefinbox.com.sg)

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## WHY IS IT INNOVATIVE?

### ► Fully automated, efficient and cost-saving

The smart vending machine outlets are fully automated through each stage of the ordering process, from preparation to payment. The concept removes the cost of employing extra employees, as well as reduces waiting and queuing time. Each order is served within three minutes. In addition, it utilizes touch-screen technology, which offers a unique ordering experience to the customer, while creating a conduit for ads and product promotion, generating another significant source of revenue for the company.

### ► Customizable, smart and interactive payment kiosks

The smart vending machine provides an extensive experience in self-service vending, allowing real-time customization and pricing. It accepts cashless payments via PayPal, Visa and MasterCard. Some outlets, including the ones near local universities, also accept cash to facilitate student payments. In

the future, payments may incorporate mobile pre-ordering and immediate collection at outlets to further reduce waiting and queuing time and increase the efficiency of the ordering process.

### ► Social commerce, making use of order history

Chef-In-Box engages in social commerce and informs customers of upcoming discounts and promotions through emails, messages and Facebook. To further enhance the service provided to customers, the smart vending machines also collect data from consumers that is kept strictly private, except from the vendor. Chef-in-Box uses order histories to build customer profiles based on previous orders and, therefore, can offer better and more personalized solutions and recommendations in the future.



## Ebeltoft Group Expert Comment

We see the automated touch-screen technology and interactive payment kiosk of the smart vending machine as a means to collect more consumer information, as well as conduct customer demographic analytics efficiently. Data can help determine preferred food choices and varieties, identify popular food trends, such as health consciousness, and assist in refining the menu accordingly.

At the same time, this information can be utilized to monitor consumer habits and behavior, including popular food choices, product preferences, product movement, as well as machine downtimes and other critical information. This data can be used to optimize and better manage inventory and the supply chain to avoid stock-outs or overstocking, creating efficiencies for both customers and vendors.

U.S.A.

# Lowe's Innovation Lab

Major home improvement company Lowe's has leapt into innovation with strategies that raise the customer experience to a new, futuristic level. Lowe's Innovation Labs is building new technologies to solve consumer problems with uncommon partners: robots. In 2014, Lowe's introduced the 3D Holoroom into select Lowe's stores nationwide, featuring science fiction prototyping and retail service robots. The company has since also invested in employees to make them move more efficiently. A lightweight, flexible "exosuit" was developed with Virginia Tech to reinforce proper lifting and make it easy to serve customers.

Lowe's Innovation Labs is using this process to:

- think broadly about potential applications for disruptive technologies
- build an innovation roadmap
- rapidly prototype new technology in real-world, living labs.

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## KEY DATA

**Country:** U.S.A.

**Retailer:** Lowe's

**Category:** Home improvement

**Format:** Stand-alone

**Website:** [www.lowesinnovationlabs.com](http://www.lowesinnovationlabs.com)

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## WHY IS IT INNOVATIVE?

### ▶ Helping customers live better

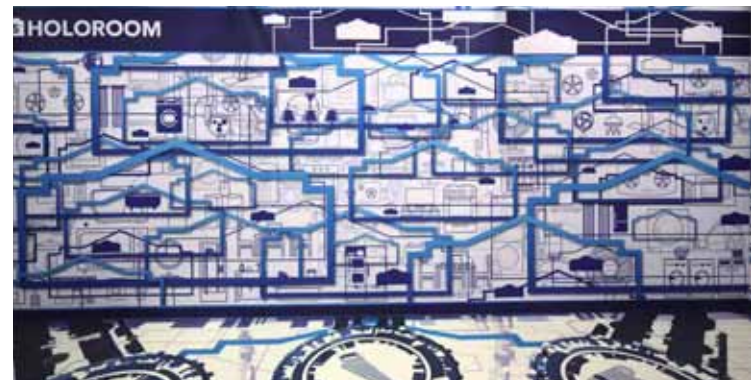
Integrates new, innovative experience into a traditional home-improvement store with outside-the-box thinking to help people live better in their homes.

### ▶ Turning dreams into reality

Using the Holoroom, customers can physically experience the layout and design of the dream room created in augmented reality. Also, customers can share accurate visuals with friends and family members through an app. The Holoroom enables customers to save money and time and avoid disappointment, because they can fine tune plans based on real-time experience, making changes before construction begins. Partnering with unique organizations, including SciFutures, Lowe's helps customers imagine what the future may be, and craft it.

### ▶ Robots: the ultimate time-saver

Bilingual OSHbot greeting robots are programmed to identify, communicate and navigate items quickly for busy customers. The robots save customers time by eliminating searching the aisles for desired items. As in-store inventory is rearranged, the robots automatically adjust to the reorganization overnight in preparation for helping customers the next day.



## Ebeltoft Group Expert Comment

Lowe's set the bar high, reinventing the traditional DIY retail experience, and now is investing in technology both to improve the store experience, as well as to make it easier for customers to use products and visualize what they need and want.

U.S.A.

# Walmart

Walmart's Walmart Labs division has focused on the development of progressive and innovative technologies to gain relevancy in today's retail environment and bring novelty to customer experience. New innovations and ideas have ranged from internal technologies to making the shopping experience more convenient and simple. Walmart is testing new approaches at its supercenters to keep up with consumers' digitally driven lifestyles.

Walmart has created an internet technology company inside the world's largest retailer. The company is investing in commerce to bring experiences and products to life, cater via mobile technology to the 200 million customers who visit stores worldwide each week and focus on open-source communications, as well as build technologies that impact the industry on an enormous scale.

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## KEY DATA

**Country:** U.S.A.

**Retailer:** Walmart

**Category:** Digitally assisted big box

**Format:** Stand-alone pickup

**Website:** [www.walmart.com](http://www.walmart.com)

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## WHY IS IT INNOVATIVE?

### ► Online to in-store, seamlessly

The concept features an automated pick-up tower, where customers can order something online, have it sent to the store and pick up their purchase seamlessly. As an “ATM for groceries” Walmart has been testing kiosks that provide customers with the option to pick up their groceries any time of the day or week. The technology allows customers completing online grocery orders at the store to select self-service as a pick-up option. Customers arriving at the kiosk provide a confirmation code on a screen, after which bay doors open, making available the assembled order in less than 60 seconds. The unit is 20-feet-wide by 80-feet-long and can hold 30,000 items, including chilled and frozen products. It supports five jobs, but can operate unstaffed, allowing 24-hour access. There is a \$30 spending threshold for orders, which must be placed during store hours. There are no extra fees or other limitations.



### ► Scanning for speed

Scan-and-go technology allows customers to skip checkout lines and pay for purchases using smartphones. The company announced that it is launching a number of updates to its app that will speed up trips to the pharmacy and money-services department. With the changes, customers will be able to refill prescriptions through the Walmart app and skip the line when they arrive at the store to pick them up. There will be a new express line at the pharmacy, where customers can scan a code on their app that notifies pharmacy staff of their arrival. Then, a store associate delivers the prescription to the customer.

### ► Low-cost convenience for customers

Roll-out of free two-day shipping to compete with Amazon on 2 million items for orders over \$35. All Walmart customers qualify for free two-day shipping. There are no fees and enrollment in membership programs is not required. The concept offers better and more personalized solutions and recommendations going forward.



## Ebeltoft Group Expert Comment

Walmart isn't letting major players like Amazon get in its way and is continuing to test new and innovative lab-developed technology, like automated pick-ups, to reach more customers. The company is focused on rebuilding and updating its brand in a very progressive way. Walmart has started to reinvent the future of shopping by empowering customers to shop smarter.

U.K. and 9 other countries in Europe

# Pepe Jeans

Pepe Jeans is a lifestyle-apparel brand established in London in 1973. Its new flagship store at 59-61 Regent Street was opened to deliver an innovative retail experience to its young customer base by integrating tech features into the in-store shopping journey. The new flagship was designed by Martin Brudniziki and is the first in Pepe Jeans' estate to use the concept. The 1,500-sqm space showcases the brand's full complement of women's wear, menswear, denim range, accessories and footwear.

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## KEY DATA

**Country:** U.K. and nine other countries in Europe

**Retailer:** Pepe Jeans

**Category:** Apparel

**Format:** Online + physical stores

**Website:** [www.pepejeans.com](http://www.pepejeans.com)

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## WHY IS IT INNOVATIVE?

### ► Customization for individualization

In-store and online custom studio allows shoppers to add bespoke graphics, text, rips and studs to Pepe products.

### ► Smart tech helps customers make decisions

Changing rooms with interactive screens, powered by RFID technology, allow consumers to see full-scale images based on a product and link the customer to sales assistants, so they can request different sizes without leaving the changing room.

### ► Playful use of technology

LED art installation provides a “wow” factor. Also, its live Twitter wall display and campaign visuals link online impressions to the real world.



## Ebeltoft Group Expert Comment

London was Pepe Jeans' birthplace and, therefore, a natural location to showcase its cutting-edge innovation alongside its rich heritage. It's interesting that this concept is positioned as the first of many to be rolled out across the business. This concept creates multiple digital experiences that both engage consumers and improve their shopping experience, which incorporates a product-customization area, interactive changing rooms and LED art installations. The aim of the store is to create an innovative, experience-led environment for its primarily younger customer, increasing consumer engagement and aligning in-store with online activity.

U.K.

# Unmade

Unmade is a technology and manufacturing platform that creates customized, knitted garments. While the business integrates with partner brands, it also has launched its own concept store, Unmade, where shoppers can customize designer patterns in knitted garments for on-demand production.

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## KEY DATA

**Country:** U.K.

**Retailer:** Unmade

**Category:** Fashion

**Format:** Online

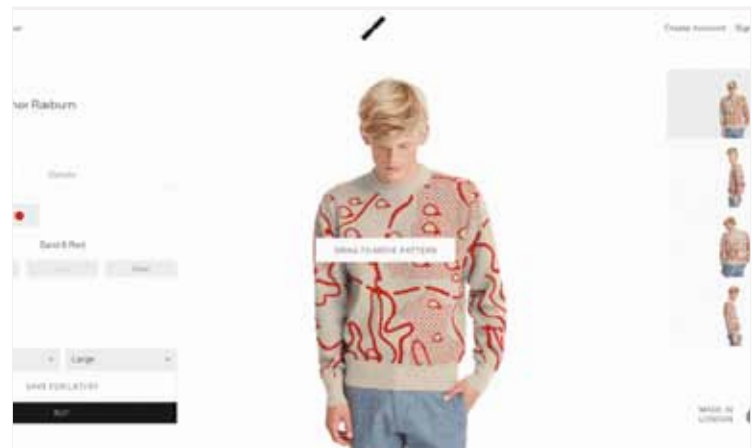
**Website:** [www.unmade.com](http://www.unmade.com)

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## WHY IS IT INNOVATIVE?

- ▶ **Putting the consumer at the heart of the making process**  
Giving the consumer such control of the process creates a closer bond with the brand, as well as a unique and personal product. When the technology has been used in pop-ups, the knitwear machinery is on view in-store, allowing consumers to see how their product is manufactured. This takes the consumer right to the heart of the making process, creating a memorable, interesting and unique in-store experience
- ▶ **Online-offline**  
Smart technology is often limited to one format, but this technology can be accessed by shoppers both in-store and online.
- ▶ **Efficient and sustainable supply chain**  
On-demand production using small machines means that garments can be made quickly, efficiently and locally, achieving the same cost and speed as mass production.



## Ebeltoft Group Expert Comment

Unmade is a powerful concept that disrupts the traditional production process by bringing consumers into the making process. Focusing (for now) on designer collaborations, the platform adds extra layers to the standard premium experience, creating both a unique experience and end-product for the consumer to own. Commercially, Unmade's opportunity is twofold; while pursuing its own brand concept, both online and in pop-ups, the system is also able to integrate into the e-commerce platforms of third-party brands. While the production process is customized, its on-demand nature means that it is highly efficient and can be produced locally.

# Australia

## eBay Myer

eBay and Myer have collaborated for an award-winning virtual reality shopping experience. As an extension of the existing Myer online store (on eBay), now, with “shopticals,” customers can participate in the in-store shopping experience from the comfort of their own home. This saves time – especially in geographically remote locations – and is an exciting new shopping format for adaption of VR technology.

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### KEY DATA

**Country:** Australia

**Retailer:** eBay Myer (partnership)

**Category:** Virtual reality shopping experience

**Format:** Virtual reality-assisted retail

**Website:** [www.vr.ebay.com.au](http://www.vr.ebay.com.au)

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## WHY IS IT INNOVATIVE?

### ► Productive partnership

Using the latest technology in a partnership between two of the most successful retailers in Australia.

### ► The best of both worlds

Taking the power of omnichannel online to the next level. You can browse, sort and purchase items, like you do in the physical store, yet this format also offers all product information, specs, etc., like online stores.

### ► Extreme shopping

It's the future of shopping: VR taking the retail industry and online shopping to an extreme. This helps expose more products to more customers by making information and products accessible online.



## Ebeltoft Group Expert Comment

eBay Myer is the first step into the future of retail. At the moment, omnichannel caters to these customers, but doesn't offer all aspects of the shopping experience. Partnership between the two biggest retailers has allowed fast delivery and offers customers the real shopping experience from the comfort of their home.

## Trend #2

# Interaction

As a result of globalization and a world increasingly merged on every level, (e.g., economically, culturally), consumers have evolved to strive for personalization in all aspects of their lives, including of goods and services, and unique lifestyle choices. In a mainstream world, we want to feel special. In retail, the interaction between customers and staff sets the scene and tone for a personal shopping experience. Due to the rise of e-commerce, when consumers decide to shop in brick-and-mortar stores, they seek the personal experience that the online world cannot provide. The interaction in the store between products, staff and brand is essential, as it allows for more accurately identifying customer needs, building relationships and loyalty and personalizing the shopping experience.

### SHOP SOCIALIZE

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**Shop Socialize** differentiates the experience by providing a social dimension through interaction with staff and other customers. Establishing the store as a provider of social experiences, or a community hub, where customers come to form social relationships, as well as buy products, ties customers emotionally to the brand. This also can be accomplished through anchoring the store in the local environment, e.g., bringing in the local hairdresser or bookshop. Mash-up concepts connect shopping with socializing.

### EXPERTISE

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**Expertise** is driven by the employees of the store. With the ever-increasing devotion to e-commerce, personnel must fill a new role and offer customers what neither machines nor e-commerce can provide: engagement and relationships. By leveraging their expertise to educate, guide, train and entertain, personnel create a sense of presence and a personal experience.

## #2 INTERACTION :

Shop Socialize // Expertise



// On demand

#4 R

France

# L'appart de Leroy Merlin

L'appart is not a store, but a place for meeting and learning. Leroy-Merlin, a European leader in home improvement, is known for its very large stores located in suburbs. L'appart aims at bringing the brand downtown, focusing on services and customer relations above products and purchase. Customers can define their projects with the support of "roommates" (staff) and 3D technology and participate in training and workshops. The product range in-store is very limited (some decorative or basic products), but customers have access to the whole range through digital devices.

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## KEY DATA

**Country:** France

**Retailer:** Leroy Merlin

**Category:** Home improvement

**Format:** 200 sqm

**Website:** [www.lappart.leroymerlin.fr](http://www.lappart.leroymerlin.fr)

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## WHY IS IT INNOVATIVE?

### ► Catering to customers

Only 20% of the space is transactional and product-oriented. The rest of the store is dedicated to training sessions, workshops and customer relations. Digital capabilities are available, but the heart of the concept is human-based.

### ► Education and application

The concept is, above all, about teaching skills, which makes sense. The more self-confident customers are, the more ambitious their home-improvement projects will be.

### ► Community

The concept is also about communities, conveying to customers that the place is “yours.” It can also be used by private associations or groups of customers.



## Ebeltoft Group Expert Comment

Many believe that stores of the future will be venues for engagement, more than for transactions. L'Appart is a radical and credible example of this trend. It brings the brand downtown, creates new connections with customers and a wider ecosystem and improves customers' skills, which helps them launch more ambitious improvement projects. The test is too recent to assess the payback for Leroy-Merlin, but L'Appart is definitely a great example of a retail format R&D.

Switzerland

# Mini-Migros

Migros is one of the biggest Swiss supermarket chains. With Mini-Migros, Migros introduced a play (and playful) format of its supermarket. From exclusive products to branded cashiers and shopping carts, everything is designed just like the regular Migros supermarket, but in a small format. Located within Swiss shopping centers, Mini-Migros invites children and parents to interact with each other and the Migros brand.

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## KEY DATA

**Country:** Switzerland

**Retailer:** Migros

**Category:** Food/community-building

**Format:** Shops within shopping centers

**Website:** [www.migros.ch](http://www.migros.ch)

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## WHY IS IT INNOVATIVE?

### ► Future target group

Mini-Migros targets the youngest generation, allowing kids to interact with the Migros brand in a playful setting. In the recreated Migros supermarket, children are able to take different roles, all associated with the day-to-day business of a real Migros supermarket. For example, they can pretend to be cashiers, refill shelves with inventory, “bake” bread in the dedicated oven in the bread aisle, or simply pretend to be a customer pushing his or her shopping cart around. In other words, they pursue activities that will make them identify with the Migros brand, before becoming a paying customer.

### ► Brings together people with similar interests

Mini-Migros attracts families with children. While the children are playing together, their parents can chat about subjects they have in common. In this way, Mini-Migros enables people from different backgrounds, but with shared interests, to interact with each other, forming a temporary, pop-up community.

### ► Provides interaction that the online world can't offer

Playing in a meticulously recreated Migros supermarket is an experience for children the online world cannot offer. Children can explore the supermarket, stroll around with their shopping carts and select and touch the recreated Migros products.



## Ebeltoft Group Expert Comment

The concept specifically taps into the interaction trend. First, it enables children to interact with the Migros brand, enjoying the play format of the Migros supermarket. Also, identification with the brand is encouraged, as children can take on the role of Migros employees, such as cashiers and inventory staff. Secondly, Mini-Migros promotes the interaction of children and parents. Parents can exchange child-related information; children can play with each other and find new friends. Meanwhile, Mini-Migros forms and supports a temporary community.

Germany: Bocholt

# ROSE Bikes GmbH

ROSE Bikes, a German manufacturer and retailer of bicycles and bike accessories, with roots in the mail order business, modernized and rebuilt its 6,000-sqm store in Bocholt, aiming to link the off-line and online experiences and create an interactive customer-experience venue. The result is a flagship store supporting maximum customer interaction, as well as brand and product experience.

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## KEY DATA

**Country:** Germany: Bocholt

**Retailer:** ROSE Bikes GmbH

**Category:** Bicycles/bicycle accessories/  
clothing

**Format:** Flagship experience store

**Website:** [www.rosebikes.de](http://www.rosebikes.de)

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## WHY IS IT INNOVATIVE?

### ► Smooth omnichannel customer journey

The integrated shopper journey of customers of ROSE BIKETOWN can begin either online or offline. Prospective customers can start configuring their future bike in the online shop and finish it in the physical store by transferring the online data saved on their loyalty cards to in-store devices, or can start configuring in the store and finish their bike at home.

To make sure customers are fully satisfied with their choice, expert advice is available when the bike is handed over to the customer. When the ordered bike is picked up, it is presented to the customer in a private room.

### ► Digital in-store features with real customer benefits

In addition to the iPad stations beside several bikes, there are three big configuration screens where the created bike can be seen in full scale. Other features include a foot-measurement service and virtual shoe fitting. Also, a perfectly fitted saddle can be customized to make sitting and riding as comfortable as possible.

### ► Enhancing the shopping experience through interaction

In addition to the offer of digital in-store features, customers are able to interact with products, staff and even other customers. ROSE Bikes developed several testing stations, such as a pump station for testing air pumps, a GPS station for demonstrating different navigation systems and a dark room for testing bike lights in real darkness conditions. Even glasses can be tested and perfectly fitted in a wind tunnel.

The flagship store also offers service workshops, a coffee bar/community lounge and free in-store WiFi.

The visual merchandising in the sales area and product presentation communicate great passion for cycling and bikes.



## Ebeltoft Group Expert Comment

In its updated flagship store, ROSE Bikes developed a new standard for the in-store shopping experience for bicycles and bike supplies. The store is highly innovative when it comes to digital signage, as well as customer experience and personal interaction. The link between the off-line and online retail world is seamless.

ROSE BIKETOWN in Bocholt received the Store of the Year Award 2017 in the category "Out of Line" and the EuroShop Retail Design Award 2017.

U.S.A.

# Barnes & Noble

In efforts to regain relevance and attract customers, Barnes & Noble, the bookselling behemoth, has redesigned four prototype stores featuring café areas offering wine, beer and an expanded food menu. The kitchen concept store is 20% smaller than traditional locations and integrates technology and food into the customer experience; however, inventory is only slightly reduced.

Barnes & Noble installed iPad kiosks around the store to assist customers looking for books by title or genre through a store-mapping tool. Customers can also text questions and comments to store staff to receive guidance. Employees are equipped with mobile pay devices for virtual checkout. This new concept of the future represents a local focus on community.

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## KEY DATA

**Country:** U.S.A.

**Retailer:** Barnes & Noble

**Category:** Books/music/gifts/café

**Format:** Stand-alone store

**Website:** [www.barnesandnoble.com](http://www.barnesandnoble.com)

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## WHY IS IT INNOVATIVE?

### ► An evolved store

The focus is on “books as the hero” and reinventing the traditional bookstore. The entrance to the store is all about books and the store features a minimalist décor. Barnes & Noble is taking a cue from Apple by equipping staff with electronic scanners to locate titles, place orders and collect payment. Gone are the bargain aisles. Magazines are neatly lined along one wall, rather than in multiple aisles.

### ► Variety

There’s an area devoted to under-the-radar books and dedicated “rooms” for specific topic areas.

### ► Ease

The store is no longer a treasure hunt, but now features shop-in-shops of book categories with experiential settings.



## Ebeltoft Group Expert Comment

This store is a full makeover to bring relevancy back to the brand. The store is one of the first in the country to get a total makeover, complete with concrete floors, a wired community table and a full-service restaurant offering wine and local craft beer. The goal is to deliver an experience you can't get on Amazon.com. The hope is that customers will come more frequently and stay longer. Barnes & Noble knows how to create a place where customers really want to spend time. This is an example of brick-and-mortar maintaining relevancy and an opportunity for retailers who focus on creating an experience in-store to better serve their customers.

Australia

# Blackmores

Blackmores Wellbeing Centre is the ultimate destination for well-being, designed to empower and inspire guests to live a healthier, more natural life. The store offers the complete well-being experience, with rooms for private consultations with qualified naturopaths, a Wellbeing Bar for food and drink sampling, as well as a comprehensive product range. Featuring high-touch and high-tech experiences, the flagship store is a unique prototype that takes retail into a new health space, representing the next generation of interactive retailing, where consumers are treated to an integrated offer of products and services.

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## KEY DATA

**Country:** Australia

**Retailer:** Blackmores

**Category:** Health and well-being

**Format:** Health foods

**Website:** [www.blackmores.com.au](http://www.blackmores.com.au)

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## WHY IS IT INNOVATIVE?

### ► All products in one place

One-stop shopping at the ultimate destination – a wellness center – for the health-conscious. Private rooms help consultants get to know their clients and a Wellbeing Bar for food and drink allows customers to sample the product range.

### ► Driving good health decisions

The center also provides personalized experiences for customers to take control of and further invest in their health. The store helps Australians on their journey to well-being through advice and education.

### ► Products and services in a new format

Featuring digital and tactile experiences, the new flagship store is a unique prototype that takes retail into a new health space, offering the next generation of interactive retailing, where consumers are treated to an integrated offering of products and services.



## Ebeltoft Group Expert Comment

The wellness industry can be overwhelming, with so much information about which vitamins and supplements are right for your body. This center wants to be a venue where staff get to know customers in order to provide the right information and products to help them achieve their goals. Through innovation and interaction with their customers, wellness centers are raising the bar and may become the next go-to place, instead of the traditional pharmacy.

Norway

# Barnas Lekeland

The online Norwegian supermarket Kolonial opened its first physical store in 2017. Instead of replicating a traditional format, Kolonial.no asked children what they want in a grocery store. The result was a children's playcenter (without shelves and products), Barnas Lekeland (The Children's Playcenter), where children can play while parents enjoy a cup of coffee and order their groceries online for pick up in the same store, at another pick-up point, or for home delivery.

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## KEY DATA

**Country:** Norway

**Retailer:** Kolonial.no

**Category:** Grocery

**Format:** Online + 1 stand-alone store/  
showroom

**Website:** [www.kolonial.no](http://www.kolonial.no)

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Photos: Kolonial.no

## WHY IS IT INNOVATIVE?

### ► Children's ideas driving retail for adults

Many online retailers have realized the importance of a physical presence, but instead of simply opening a traditional grocery store, Kolonial.no tapped into the trend of social interaction in the retail space by allowing children to design it. This makes it the obvious choice of a place for parents to bring their kids and, maybe, do some online grocery shopping while they're there.

### ► Time well spent

By removing all products from the store, Kolonial.no allows the retail space to be used for other purposes, tapping into the trend of shoppers wanting to spend their time on other experiences they value, e.g., children's playtime and coffee breaks for adults. Families with children feel great pressure when grocery shopping, which is why they want it to be fast, simple and seamless. Barnas Lekeland enables them to both handle the shopping seamlessly, as well as spend time with their children.



## Ebeltoft Group Expert Comment

Kolonial.no, together with Barnas Lekeland, is breaking the boundaries for what a grocery store is and can be. The online supermarket is giving grocery shopping a social dimension by providing customers with a physical space for social interaction, while showing parents that a trip to the grocery store can be a pleasant experience, even with children in tow.

While the children play, parents can enjoy a cup of coffee and shop for groceries via the Kolonial.no app on their smartphones. The order can be picked up in the store, at one of Kolonial.no's pick-up places the next day, or be delivered to the customer's home.

Denmark

# Beauty by Boozt

The online fashion player Boozt.com has made a move into the beauty industry by opening a physical beauty store with a large selection of international brands. The decoration is feminine, with pink interior, brass details, green velour sofas, chandeliers and dark-red velvet curtains, inspired by the hotel industry to create a cozy atmosphere. This online-going-off-line retailer is unique in its focus on creating an “experience center” with a strong focus on expertise and service, rather than being just a place to showcase and sell products.

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## KEY DATA

**Country:** Denmark

**Retailer:** Boozt.com

**Category:** Beauty

**Format:** Online + 2 stand-alone stores

**Website:** [www.boozt.com](http://www.boozt.com)

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Photos: Magnus Omme

## WHY IS IT INNOVATIVE?

### ► **Transitioning from online to in-store**

Online player Boozt is now focusing on the physical aspect of retail and provides only a few digital tools, mainly tablets, in-store for customers. For the online player, it's important to create a beauty experience that provides customers with knowledge and information; in the store, service and expertise are emphasized.

### ► **Shopping as a journey of personal discovery**

The store is built around small "experience spaces" that customers can explore individually, at their own pace, creating a relaxed and inviting environment. The store is equipped with tables, chairs and mirrors, so customers can try and interact with products under the guidance of store employees. There are very few check-out counters; cashier equipment is built into the counter to create a cozier, at-home feel.

### ► **Fostering comfortable relationships**

The employees, called "hosts," are evaluated based primarily on customer-experience metrics, rather than sales numbers. They are equipped with hand-held POS terminals, so all transactions can be completed on the floor.



## Ebeltoft Group Expert Comment

The beauty industry is undergoing big changes with players like Sephora bringing digital to the physical store. Boozt has, however, chosen to go in another direction and created a universe contrasting online with a strong focus on aesthetics, design, expertise, service and creating a unique beauty experience. Customers, called "guests," are spoiled, and all of their senses are engaged through an experience that invites customers to explore the beauty universe, while feeling at home.

## Trend #3

# Emotional Retail

Consumers do not choose a product based solely on its functional value, but rather on what it represents and the expressed/demonstrated values of the brand. Emotional retail is all about creating emotional ties and strengthening brand awareness through intensive storytelling and strong content. Being a retailer or a brand is more than selling products or services, it's about creating identification and connections. Consumers who identify with a brand tend to commit to it more strongly. The functional value of the product or service is subordinate to the added value that comes with it representing the consumer. Consumers' perception of and identification with the brand is essential for creating a loyal, long-term relationship.

### DISCOVERY

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**Discovery** is about opening doors to the brand universe for customers so they can "discover" the brand, its history, values, etc. This can happen in a showroom, where customers go on a "journey," where brand values and identity are revealed. Storytelling is an important part of this identification process. Online retailers going off line often choose this solution in order to give customers the full brand experience, with a focus on its impact on the physical senses.

### PASSION

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**Passion** about the brand among employees makes it more credible with consumers. Creating appealing and mesmerizing stores and showrooms with strong content and storytelling is great, but without employees who are passionate about the brand acting as its ambassadors and advocates, the effort can be lost on the customers.

// On demand



#3 **EMOTIONAL RETAIL** : Discovery // Passion



#4 R

Germany: Tegernsee

# Tegernsee Arkaden

The 300-sqm Tegernsee Arkaden opened its doors in 2015 next to the tourist hot-spot restaurant Bräustüberl at the Tegernsee. Known as the “regional relish location” in the center of Upper Bavaria, the retail focus is on fine quality and regionality.

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## KEY DATA

**Country:** Germany: Tegernsee

**Retailer:** Tegernsee Arkaden

**Category:** Local delicatessen/fine food/  
gastronomy

**Format:** Local delicatessen + store +  
relish bar

**Website:** [www.tegernsee-arkaden.de](http://www.tegernsee-arkaden.de)

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## WHY IS IT INNOVATIVE?

### ► Close cooperation with outstanding local manufacturers

The Tegernsee Arkaden is an association of local manufacturers in the Tegernsee region, located one hour from Munich. Some of these manufacturers are shareholders in this special retail location. Promoting local craftsmanship and lifestyle, Tegernsee Arkaden pledges to sell only products produced within a 25-kilometer radius. The curated assortment consists of multiple delicacies, chocolate, coffee from a local roaster, spices and herbs, cheese, smoked ham and spirits, including real Bavarian whiskey. High quality and superior flavor are imperative to the operators of the Tegernsee Arkaden.

### ► Shopping and lingering

The retailer is known as the “regional relish location” in the center of Upper Bavaria. In addition to the large, light retail area, there is a café with a menu of delicacies from the store, varying daily. Customers can enjoy and experience the offer on a beautifully designed terrace, on the shore of Lake Tegernsee.

The Tegernsee Arkaden also hosts unique events, including a fashion show of traditional costumes, evenings with visiting manufacturers and Saturday tastings.



## Ebeltoft Group Expert Comment

The Tegernsee Arkaden is a great example of how to strengthen a retail and tourism location. Local manufacturers joined forces to create a new version of a marketplace, where local products are offered to a broad audience. Customer experience and excitement are critical for this retail format. Customers enjoy the purchase process and consumption of the high-quality products sold at Tegernsee Arkaden.

## Germany: Dusseldorf and Cologne

# ALDI SÜD

### **ALDI Meine Weinwelt (My World of Wine)**

ALDI SÜD – one of Germany’s biggest wine retailers – operated a wine pop-up store for five days similar to the one at the international wine fair ProWein, in Dusseldorf, in 2017.

### **ALDI Bistro**

As part of the “Simple is more” campaign in Germany, ALDI SÜD operates a moving pop-up bistro offering industrial upcycling charm. Visitors can choose among several dishes selected by well-known TV chef Robert Marx, made solely with ingredients from the ALDI SÜD assortment. After three months in Cologne, the ALDI bistro’s next stop will be Munich.

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### **KEY DATA**

**Country:** Germany: Dusseldorf and Cologne

**Retailer:** ALDI SÜD

**Category:** Food and beverages

**Format:** Pop-up concepts (wine retailing/dining)

**Website:** [www.einfach-ist-mehr.de/sued/bistro](http://www.einfach-ist-mehr.de/sued/bistro)

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## WHY IS IT INNOVATIVE?

### ▶ ALDI Meine Weinwelt (My World of Wine)

#### Discounter shows expertise in one special product group

Presented by world-renowned sommelier Markus Del Monego, a selection of 12 exclusive wines was offered at the wine pop-up in central Dusseldorf to showcase the mostly underestimated product competence and wine selection of ALDI SÜD. In addition, well-known vineyards and winemakers who collaborate with ALDI SÜD had the opportunity to present their portfolios.

While sampling the limited range of wines, visitors were guided to identify their personal preferences. Social media activities, wine brochures and give-aways complemented the offer.

With this pop-up, ALDI SÜD created a meeting point for both experienced wine connoisseurs and new aficionados not yet familiar with its high-quality wine portfolio. For those who wish to know more about its assortment, the discounter offers consultation, a magazine, recipes with suggestions for suitable pairing and a short film series via a stand-alone online presence.

### ▶ ALDI Bistro

#### Newly interpreted grocery discount

ALDI SÜD opened a 90-sqm, two-level bistro pop-up distinguished by industrial upcycling charm. Located in central Cologne, the pop-up bistro was built to reflect the slogan of ALDI's campaign, "Simple is more," emphasizing its down-to-earth, simple, stylish qualities. The exceptional bistro was created from eight containers and a wooden interior.

The pop-up operated for three months, featuring special wine-and-BBQ and fitness-and-health events. Underlining ALDI's principle of simplicity, only one menu is offered at €7.99 per day. Guests could choose a starter meat, fish or vegetarian main dish and dessert. All ingredients were part of the ALDI product range and guests received free copies of recipes from the featured meals.

In addition to simplicity, the core values of flavor and high quality are also represented by the concept.



## Ebeltoft Group Expert Comment

With both pop-up concepts, ALDI SÜD maximizes customer satisfaction and brand experience by reinterpreting its discount positioning. The grocery discounter locates in high-traffic, inner-city locations, reaching large numbers of both existing and prospective customers. The perception that discounters sell only cheap, average-quality products should be reversed by this concept. ALDI SÜD offers simplicity, flavor and high standards at a very competitive price. By maintaining this marketing flow, ALDI SÜD will be able to boost brand awareness and strengthen customer loyalty, in both the short and long terms.

Germany: Mannheim

# BUTIQ

The concept store in Mannheim is the second store, after Stuttgart, for the multichannel retailer BUTIQ. BUTIQ offers outstanding, creative and innovative living accessories, lifestyle and food products with unique stories, as well as event space in a café and bar. BUTIQ received the Store of the Year 2017 award in the category “Innovative and Creative Store Concepts.”

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## KEY DATA

**Country:** Germany: Mannheim

**Retailer:** BUTIQ

**Category:** Living accessories/  
lifestyle/food

**Format:** Concept store

**Website:** [www.butiq.de](http://www.butiq.de)

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## WHY IS IT INNOVATIVE?

### ► Changing constantly portfolio and events

Visiting the BUTIQ concept store is a veritable discovery tour. Every product in the portfolio is chosen with great care, and exciting stories behind the products are a must. The store does not specialize in one product field, because the founders want to offer an eclectic range within a melting pot of regional and international products, such as colorful socks made in Germany, slow and fine food, lifestyle accessories, jewelry, inventive gifts, car care or e-bikes. The founders are challenging themselves to include at least two new products per week to make BUTIQ an inspired destination, worth visiting regularly.

In addition, BUTIQ hosts special events, such as wine tastings with different vineyards, gin and tea tasting, a pop-up bakery, as well as events where customers can customize their own jewelry. The customers get to know designers and producers and experience the unique stories behind the assortment.

### ► Intelligent store layout with exceptional interior design

The concept store is designed with generous room to showcase the

uniqueness of every product, enhanced by special lighting effects for emphasis. The wall was painted by the well-known street art duo HERAKUT. In the rear, a café serves soft drinks, regional wines and outstanding beers. The bar links the store and café area.

### ► Use of retail technology with added value for customers

A highlight in the BUTIQ concept store is the huge LED-lit wine rack featuring a selection of fine local wines. Customers can select their menu or indicate the occasion via a touch-screen terminal for wine recommendations. The appropriate wine lights up in the rack and can be easily taken off the shelf. Another feature of the store is the 3D body scanner and printer, where customers can create their own 3D "mini-me" character.



## Ebeltoft Group Expert Comment

The BUTIQ concept store is a shopping destination worth visiting regularly. The assortment changes week to week in an environment further enhanced by diverse pop-ups, events and gatherings. Customers are surrounded by exquisite products spotlighting local, as well as international, offers, and enjoy socializing in the bar and café. BUTIQ exemplifies the future of brick-and-mortar retailing.

# Brazil

## Reserva

The Brazilian youth-clothing brand, which has 65 owned stores, eight franchises and 1,400 multi-brand stores across the country, recently opened a new concept store.

usereserva.com is more than a brick-and-mortar shop, promoting a business model beyond the traditional scope of a clothing store. It is a physical concept of e-commerce, not a point of sale, but a showroom and gathering place, with no inventory, offering digital access to Reserva's entire collection, as well as more than 20 partner brands. Purchases in-store are delivered within three hours to a customer's address, by bike – a 100% green delivery, preventing 350kg of carbon dioxide from emitting into the atmosphere.

The physical store is a sustainable, casual space, featuring areas to get together with friends, play pinball, enjoy free beer, dine in a fresh-food restaurant offering coffee, cake, savories and snacks, or be groomed by an on-site barber.

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### KEY DATA

**Country:** Brazil

**Retailer:** Reserva

**Category:** Fashion

**Format:** Brick-and-mortar + e-comm + experience store

**Website:** [www.usereserva.com/fashionmall](http://www.usereserva.com/fashionmall)

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## WHY IS IT INNOVATIVE?

### ► Omnichannel experience

Reserva stores have centralized, digitalized stock management, enabling a fully integrated omnichannel strategy. Customers have access to the complete e-commerce inventory from the store, which is delivered in a fast and eco-friendly manner.

### ► In-store services and amenities

This store was designed to make customers feel at home. Reserva.com benefits from different business partnerships, such as with Ze (barber shop) and Verdin (coffee shop), as well as a lounge with pinball and amenities.

### ► Conscious consumption

The brand philosophy promotes conscious consumption and sustainability. This store was designed to be fully sustainable. The timber floor is rustic and the front door maximizes natural light.

### ► “Give affection to people”

Reserva’s social program 1P5P addresses the problem of 52 million Brazilians not knowing whether they will have food on a given day. In partnership with NGOs, for every product sold, Reserva donates five meals to the hungry in Brazil. This program is responsible for picking up and delivering food where it is needed. Since 2016, this program has donated more than 7 million meals.



## Ebeltoft Group Expert Comment

Reserva has been one of the most innovative brands in Brazil since its founding in 2004. The business expresses a goal to “Give affection to people,” and has a consistent approach to the market. More than a clothing brand, Reserva is a brand of individuals who sell clothes.

Reserva embraces social causes, and its employees have a sense of ownership reflected in every store operation.

The reserva.com store is part of a new movement that reinforces brand positioning and sustains its innovative path.

## Canada

# Indigo

Indigo, Canada's largest books-and-music retailer, is uniquely inspired by the art gallery concept. Part bookstore, part cultural-experience department store, it exemplifies the emotional trend in retail. Indigo's innovation was a transformation from books and music into differentiated branded shops within a store, featuring stationery, flowers, American Girl, Starbucks, Fitbit and Rifle Paper & Co.

Because Indigo in Sherway Gardens (Toronto, Ontario, Canada) has been a huge success, showing strong revenue, the company will roll out this concept to other stores. For the first quarter, ended July 1, 2017, Indigo saw a 6.8% increase in revenue over last year. Total comparable store sales, including online, increased by 5%. In 2016, online sales grew by 15.3% and the company turned a \$28.6-million profit.

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### KEY DATA

**Country:** Canada

**Retailer:** Indigo

**Category:** Books and music

**Format:** Stores and e-commerce

**Website:** [www.indigo.ca](http://www.indigo.ca)

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## WHY IS IT INNOVATIVE?

### ► Partnership

Partnership with American Girl to bring American Girl shops into Indigo stores.

### ► Big ideas

Focusing on big ideas and developing products around those big ideas. For example, Indigo sees coding as a big idea for the children's department, and is launching products such as littleBits, electronic building kits teaching kids how to code.

### ► Variety

A wide range of assortments not typically found in a traditional bookstore, e.g., fresh flowers, dishes, candles, gingerbread thins, cushions and throws.

### ► Interests

Compartmentalized store design with separate sections for different interests/topics (e.g., "A Room of Her Own" section, art and photography section) provides customers with an art gallery—or museum-type shopping experience.



## Ebeltoft Group Expert Comment

Ideas come first, then products. Big ideas include unplugging, early literacy and eating real food. Books and music follow.

Spain

# IKEA temporary

IKEA tested a new city-center concept store in Spain, created after interviews with many customers who visited two city-center pop-ups over 10 days in October 2016.

This is a 900-sqm store on a top commercial street of Madrid. The store's temporary focus during its first six months of operation was on bedrooms; followed by another product theme.

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## KEY DATA

**Country:** Spain

**Retailer:** IKEA

**Category:** Home furnishings

**Format:** New city-center store

**Website:** [www.ikea.com/ms/es\\_ES/campaigns/tienda-serrano/](http://www.ikea.com/ms/es_ES/campaigns/tienda-serrano/)

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## WHY IS IT INNOVATIVE?

It's a different IKEA. The company wants to test a new relationship with customers and discover the right ingredients for the IKEA of the future.

### ► Experiential shopping and inspiration

Visual merchandising is based on surrealism in dreams, supporting the bedroom theme. Window displays are created by different local artists and changed monthly.

### ► Customization

Pillows and sheets can be instantly embroidered with initials or five pre-set phrases that change monthly. The iconic furniture can be customized with vinyl designs or lacquered in different colors. The signature PAX wardrobe system is customized for specific spaces.

### ► Higher interaction

Workshops are held in the store's coffee shop and customers can ask for expert interior-design advice. A customer can ask a question in a digital booth and will receive an emailed solution, or can schedule an appointment with an interior designer via the web, in the store, or at home.

### ► Product range

Although only 300 in-store products are available to take home, every IKEA product can be bought online and delivered.



## Ebeltoft Group Expert Comment

IKEA is not just opening a store in the city center, as are many other outskirts retailers in Spain, but is developing a new way to engage with customers. The new concept offers more experiential shopping and exciting new features, so a trip to the city-center store adds to - and does not eliminate - a trip to the traditional IKEA. The company is delivering the new format as a continuous testing concept, until it identifies what best suits customers, both in the city-center concept and as new elements to enhance the traditional outskirts concept.

South Korea/U.S.A.

# LINE Friends

LINE Friends is the first Asian character brand to open an official large-scale store in the U.S., marking the one-year anniversary of LINE's listing on the NYSE, after piloting a pop-up store to gain traction. LINE Friends are sticker characters created for its top mobile messenger app, which has 220 million users globally. LINE boasts more than 5,000 products, including animations, mobile games, cafés, hotels and theme parks around the world. In March 2015, LINE Friends began establishing independent stores and since has opened 84 around the world, implementing aggressive strategies based on stable sales in Shanghai, Beijing, Chengdu, Hong Kong and Seoul. LINE Friends has collaborated with well-known brands, such as LAMY, UNIQLO, L'occitane, Brompton, Samsung Electronics, Swarovski, Moleskine, Bearbrick, and more. With success across Asia, the Seoul, South Korea-based brand opened its first U.S. outpost in New York's Times Square, emboldened by its growing global popularity. The 4,628-sq. ft. store drew more than 30,000 people during pre-opening week and hopes to grow as a character brand that crosses physical international and cultural barriers.

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## KEY DATA

**Country:** South Korea/U.S.A.

**Retailer:** LINE Friends

**Category:** Local delicatessen/fine food/gastronomy

**Format:** Stand-alone store

**Website:** [www.linefriends.com](http://www.linefriends.com)

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## WHY IS IT INNOVATIVE?

### ► New revenue

The original LINE sticker brought a new revenue stream and the company leveraged it with retail stores created to sell virtual character stickers in plush form and create a whole brand around them.

### ► Push to grow

Though it is pushing to grow, LINE Friends has experienced stagnant growth outside its core markets in Japan, Thailand, Taiwan and Indonesia. With the Times Square store, LINE hopes to grow the characters for global expansion and to increase the number of app users.



## Ebeltoft Group Expert Comment

This is a key example of how brands are going retail and changing traditional formats to create an experience beyond selling products.

U.K.

# Fabled by Marie Claire

Marie Claire has been a publishing-industry leader for decades. Now, the company has entered a new domain: the world of retail. Fabled by Marie Claire, in partnership with Ocado, is a test-and-play boutique in London, bringing forward a brand that aligns off-line and online shopping experiences.

A reflection of the changing ways in which women consume beauty content, as well as buy products, Fabled targets beauty-savvy consumers. Building on Marie Claire's reputation as an influential voice on beauty, each counter promotes The Edit, a carefully curated selection of items recommended by the magazine's editors. By enabling shoppers to swipe and browse, Fabled blends an interactive and digital experience with in-store shopping.

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## KEY DATA

**Country:** U.K.

**Retailer:** Ocado and Marie Claire

**Category:** Beauty retail

**Format:** Digitalized in-store

**Website:** [www.fabled.com](http://www.fabled.com)

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## WHY IS IT INNOVATIVE?

### ► The beauty experience

The main aim of the store is to create an experiential customer journey. Customers can test and experiment with beauty products within a Fabled Edits area dedicated to seasonal recommendations, based on an editorial concept from Marie Claire magazine. There is also a fragrance room and an entire mezzanine level for skin-care products.

### ► Interactive

The seamless digital experience enables shoppers to swipe and browse, bringing an interactive element into the store experience.

### ► A hybrid model

As women look for new ways to explore and express themselves through beauty, Fabled brings a fresh and unique approach to the beauty retail marketplace that perfectly combines the solid brand authority and influence of Marie Claire with the e-commerce expertise of Ocado.



## Ebeltoft Group Expert Comment

As brands re-vision their concepts and innovate for the future, Marie Claire has built a multifaceted retail experience based on the magazine.

U.S.A.

# Nike Soho

Nike is leading the transformation of sports retail and redefining the purpose of brick-and-mortar evolution in a time of ever-ascending e-commerce. Nike has created a retail format that is part store, part brand museum. The five-story, 55,000-sq. ft. space is loaded with technology, from 3D decorations to a kinect-powered basketball court. One display features 20 female mannequins clothed in different Nike ensembles, recreating 20 individual athletes. Vintage sneakers, such as the 1986 Nike Dunk High, are displayed in glass boxes, presenting an abridged history of the company's footwear, and an interactive feature allows shoppers to engage with a timeline of the company and its sneakers. Each floor of the store is devoted to departments, including running, menswear, women's wear and basketball. The basketball floor even includes a half court, where customers can try new sneakers before they buy. The Nike Soho store template is being rolled out in tourist locales around the world, with recent additions in Miami, Moscow and Beijing. Rather than attempting to drive profits in the traditional retail model, these stores' primary role is as a marketing vehicle.

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## KEY DATA

**Country:** U.S.A.

**Retailer:** Nike Soho

**Category:** Sports retail and experience

**Format:** Stand-alone

**Website:** [www.news.nike.com/news/nike-soho-first-look](http://www.news.nike.com/news/nike-soho-first-look)

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## WHY IS IT INNOVATIVE?

### ► High-tech, high-touch

Encourages test and play. The tech inside the store isn't meant to be the main attraction; instead, the features are designed to make the shopping experience more personal. In the hoop/basketball area, the kinect sensors capture movements from the consumer's body and display them on a massive screen. These areas are created as a place to test products and try on shoes.

### ► Experience performance

Powered by immersive digital trials and in-store experts, this store is about elevating every athlete's potential. Whether training for a marathon, shooting hoops, doing drills on the in-store court, or indulging a passion for sneakers, Nike Soho will help raise the customer's game. It's more than a store — it's a personal sports experience.



## Ebeltoft Group Expert Comment

Designed to deliver the best of Nike's personalized services, from exclusive trial spaces to product customization, the store creates a seamless link between Nike's digital and physical platforms and is leading the transformation of sports retail. The store defines innovation of the brand and sets the stage for major brands, while continuing to expand its store presence to create an immersive experience.

Italy

# LAGO

LAGO was founded in the late 1800s by a single craftsman. Today, it is an international design company operated by three brothers.

The company is active in the interior design of domestic, public and business spaces, including homes, offices, hotels and commercial spaces.

The LAGO philosophy is expressed in a 10-point manifesto that outlines its key elements.

**No. 1:** Immediate and simple. **No. 2:** We design interiors for your interior life. **No. 3:** We believe in the atoms and bits of human relationships. **No. 4:** We have a compass: head, heart, courage.

**No. 5:** We plan solid objects to fill empty spaces beautifully. **No. 6:** Beauty lies in the vision of the whole. **No. 7:** The essentials, enduring over time. **No. 8:** You are the design, we provide the tools.

**No. 9:** Creativity comes when you do what you love. **No. 10:** Never stop.

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## KEY DATA

**Country:** Italy

**Retailer:** Lago

**Category:** High-end furniture manufacturer that evolved into retail + interior design services

**Format:** 30 mono-brand worldwide + 400 shop-in-shop. Turnover 2016: 30 mln € (70% Italy and 30% international)

**Website:** [www.lago.it/en](http://www.lago.it/en)

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## WHY IS IT INNOVATIVE?

### ► Values driving design

LAGO sees design as a discipline that produces both products and meanings, to improve people's lives. For LAGO, design is a tool for social transformation, facilitating interactions that generate meaning and culture. In 2014, the LAGO DESIGN NETWORK launched a series of public and private spaces conceived with distinctive design and connected by a powerful communication engine.

### ► A diversified retail network

LAGO's distribution network includes different retail outlets: 30 mono-brand LAGO stores (in major cities, including Rome, Milan, Madrid, Paris and London, with a store inside Harrods), 400 multi-brand stores and alternative retail, like APPARTAMENTO LAGO. All stores are created with an intimate ambiance, so that customers feel at home within an evolved and involving shopping experience.

### ► Engaging experience

The Talking Furniture project comes from research on the Internet of Things. Its goal is to establish interactivity with furniture, amplifying the experience of the product, which becomes a vehicle for content. Through the use of NFC technology, a chip integrated in the furniture interacts with smartphones and tells stories. Customers will enjoy more engaging experiences (e.g., saving memories about a piece of furniture), or read additional content, such as recipes in the kitchen and fairytales in the bedrooms.

### ► Greentailing

LAGO products have received many prizes and awards, such as for the Air kitchen, winner of the "2016 Salone del Mobile Milano Award" for best kitchen.

The company is very conscious of green issues. With its Air sofas, LAGO introduced environmental parameters in its production for the first time, thanks to the LCA (life cycle assessment). LCA describes the quantitative assessment of a product's or service's carbon footprint throughout its life cycle, from the selection of raw material to its disposal. Also, the extremely lean production cycle aims at waste reduction through a corporate structure that rewards maximum efficiency in industrial production processes.

### ► APPARTAMENTO LAGO

APPARTAMENTO LAGO is an example of horizontal retail. The project involves a partnership with people passionate about design who use their own homes, designed and furnished with LAGO items, as showrooms. They agree to schedule open days for visitors and to organize and host cultural events. LAGO promotes these activities through its website and social media in order to create connections and business.

The project was launched in Milan in 2009, during the Salone del Mobile, and then exported to other Italian and foreign cities.



## Ebeltoft Group Expert Comment

LAGO is a constantly evolving company with projects related to environments and spaces, including private apartments, hotels, offices, public spaces, buildings, bars, restaurants and commercial spaces. The expanding enterprise promotes productive connections. All projects aim at creating a better experience for customers based on the belief that if people spend most of their time in better-quality environments, the quality of their lives will be enhanced.

U.K.

# Dr. Martens

Dr. Martens is a globally recognized footwear, clothing and accessories brand, known for its trademark yellow-stitch boots and AirWaves soles. The iconic boots have been visibly associated over time with diverse groups in British culture, galvanizing people who are proud of their authenticity and self-expression.

Dr. Martens' newest flagship store is located in a 4,000-sq. ft., grade-II-listed building in Camden Market and features interactive elements conceived to personalize an entertaining shopping experience.

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## KEY DATA

**Country:** U.K.

**Retailer:** Dr. Martens

**Category:** Footwear

**Format:** Stand-alone stores online

**Website:** [www.drmartens.com/uk](http://www.drmartens.com/uk)

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## WHY IS IT INNOVATIVE?

### ▶ Investing in entertainment

Entertaining customers is key for the Dr. Martens brand, which aims to create spaces where customers interact as a community. This concept incorporates a performance stage – The Boot Room – featuring regular acts, and a GIF booth, giving up potential sales space to benefit the overall experience.

### ▶ Programmed environment

The store also offers customized events and exclusive products. Guest artists personalize both newly purchased and beloved old boots with distinctive designs.



## Ebeltoft Group Expert Comment

Consistent with its strong commitment to diversity, rebelliousness and uniqueness, rather than designing an overtly commercial environment, Dr. Martens has, over time, created spaces where dedicated customers gather for shared and personalized experiences, which generate sales, cultivate an unusually loyal consumer base and foster a strong emotional connection to the brand. The new store in Camden is further energized by programmed, in-store activities that infuse the customer experience, including innovative entertainment (e.g., a GIF booth and music on stage) and personalized products.

The Netherlands

# De Balkonie

Most urbanites in The Netherlands don't own a car; instead, they get around by bike and enjoy a balcony, instead of a garden, as their outdoor living area. At the same time, most Dutch garden centers are located outside city centers and focus on a garden assortment.

Recognizing the potential in this niche, De Balkonie launched the first store specialized in "everything for your balcony." This format merchandising urban balcony decoration helps city residents to optimize their (relatively) small balcony space.

This store offers a focused assortment, innovative products and personal advice. It sells sustainable plants and inspires people via social media every day.

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## KEY DATA

**Country:** The Netherlands

**Retailer:** De Balkonie

**Category:** Garden

**Format:** City-concept balcony store

**Website:** [www.debalkonie.nl](http://www.debalkonie.nl)

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## WHY IS IT INNOVATIVE?

### ▶ A new demographic

De Balkonie is the first store in The Netherlands that focuses on the needs of an increasing number of urban residents with (small) balconies.

### ▶ More ideas

De Balkonie inspires and educates customers on how to optimize their limited space creatively.

### ▶ Enhancing life

De Balkonie organizes in-store events to share its passion with customers, as well as contribute to a better living environment.



## Ebeltoft Group Expert Comment

De Balkonie is the smart answer to the trend of urbanization combined with the need for green space, contributing to the creation of a pleasant living area. The store educates people to help them optimize their limited outdoor space. At the same time, customers' experiences are enhanced by events that highlight their shared passion for green urban space. Because of the urbanization trend, we believe this concept is scalable and could be successful in other parts of Amsterdam, in other cities and even other countries.

The Netherlands

# Foodmarkt City by Jumbo

Foodmarkt City by Dutch supermarket Jumbo is a new, contemporary convenience store with a focus on homemade meals and products, fresh every day. The store is also the destination for fast grocery shopping. In this new concept, Jumbo combines elements from Jumbo stores, food market and restaurant chain, La Place. The concept reflects the current demands and lifestyle of urbanites. Customers can quickly and easily find fresh, tasty meals and products from Foodmarkt's local kitchen and bakery for breakfast, lunch and dinner to make, take away or eat on the spot.

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## KEY DATA

**Country:** The Netherlands

**Retailer:** Jumbo and La Place

**Category:** Food

**Format:** Convenience food store  
in the city center

**Website:** [www.foodmarktcity.com](http://www.foodmarktcity.com)

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## WHY IS IT INNOVATIVE?

### ► Solutions

Foodmarkt City distinguishes itself by providing solutions for urban residents seeking fast, convenient shopping experiences, healthy products and competitive prices where and when the customer needs them.



## Ebeltoft Group Expert Comment

Foodmarkt City is a unique format combining a supermarket, food market and restaurant. This inspired concept offers a “real food experience,” featuring healthy, fresh meals to make, take away or eat on the spot. Foodmarkt provides a food solution for every moment. In addition, Foodmarkt City is a food solution for busy downtowns, making it easy to get good, healthy food. And, there’s an app for people in a hurry, enabling consumers to check the available assortment in real time and easily order breakfast, lunch or dinner. Within 35 minutes, the meal will be delivered to GPS coordinates, and can be paid for via the app. Also, consumers can indicate eating preferences, which will generate a relevant, customized assortment.

# Germany: Dusseldorf

## Orsay

The vertical multichannel fashion retailer Orsay converted its 400-sqm store in Dusseldorf into a bright and welcoming omnichannel store reflecting its motto, "My Fashion Connection." The new store concept is the right answer to declining foot traffic and progressive digitalization in retail. Transmission of the new concept to existing stores is planned.

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### KEY DATA

**Country:** Germany: Dusseldorf

**Retailer:** Orsay

**Category:** Fashion

**Format:** Omnichannel store concept

**Website:** [www.orsay.com/de-de](http://www.orsay.com/de-de)

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## WHY IS IT INNOVATIVE?

### ► Purchasing fast fashion in a premium environment

Orsay places customers in the center of the entrepreneurial environment to “democratize the service.” Orsay wants to provide all services that customers expect in a premium fashion segment, such as personal shopping, events, one-to-one contact with a favorite shop assistant, styling advice, click-and-collect, club loyalty program, and more. Customers can try on apparel in a 40-sqm fitting room. In addition, events in a dedicated area on the first floor enhance the brand experience.

### ► Smooth online-off-line mashup

Orsay emphasizes the online/off-line mashup, including digital features, moving images and several touchpoints, via the Orsay app and web shop. The design and layout of the new brick-and-mortar store was inspired by the architecture and palette of the corporate online shop. The new Orsay store is also referred to as “Omni-Orsay.”



## Ebeltoft Group Expert Comment

The new omnichannel store concept of Orsay in Dusseldorf interprets retail technology as very feminine and emotional, satisfying the needs of the Orsay target group - young, fashionable women looking for outfits that turn heads. The transformation of the online shop to the brick-and-mortar retail world was a success and concept recognition is very high.

## Trend #4

# Responsibility

Consumers care, and so should you. They care about the environment – both locally and globally, they care about people and social responsibility, they care about themselves and what they put in and on their bodies, they care about production conditions, etc., and, therefore, we quite often see consumer outcry when businesses are discovered to be violating social norms. Consumers have never been more socially conscious and brands and retailers should, therefore, incorporate social responsibility into their brand identity. Consumers want to feel that they are part of something greater when buying a brand, meaning that brands must provide them with an opportunity to support a good cause.

### CARING

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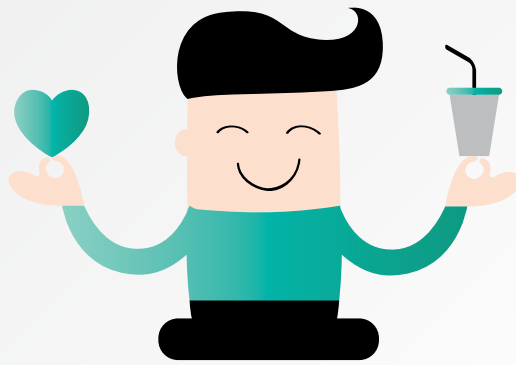
**Caring** is about demonstrating social responsibility and highlighting an ethical, honest and responsible business concept. It is about making the world a better place by encouraging solidarity and making an effort to preserve and protect what is natural. Demonstrating caring is offering consumption in good conscience, by producing environmentally sound and responsible products and services. Sustainability, animal welfare and fair trade are in high demand.

### PURPOSE

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**Purpose** is closely related to caring. Here, you offer the consumer the opportunity to be part of something even greater than buying products in good conscience. When buying the product or service, the consumer is provided with a purpose. Both consumers and employees must see themselves reflected in company values, or be able to support a good cause through the purchase.

#4 RESPONSIBILITY : Caring // Purpose



// Passion

Romania

# UpsideDown

UpsideDown is an original and highly responsible alternative to recycling materials. Called “upcycling,” the concept was introduced in Romania by three creative young people who are transforming street banners and old trucks’ tarpaulins into unique pieces, such as wallets, handbags and book and laptop covers.

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## KEY DATA

**Country:** Romania

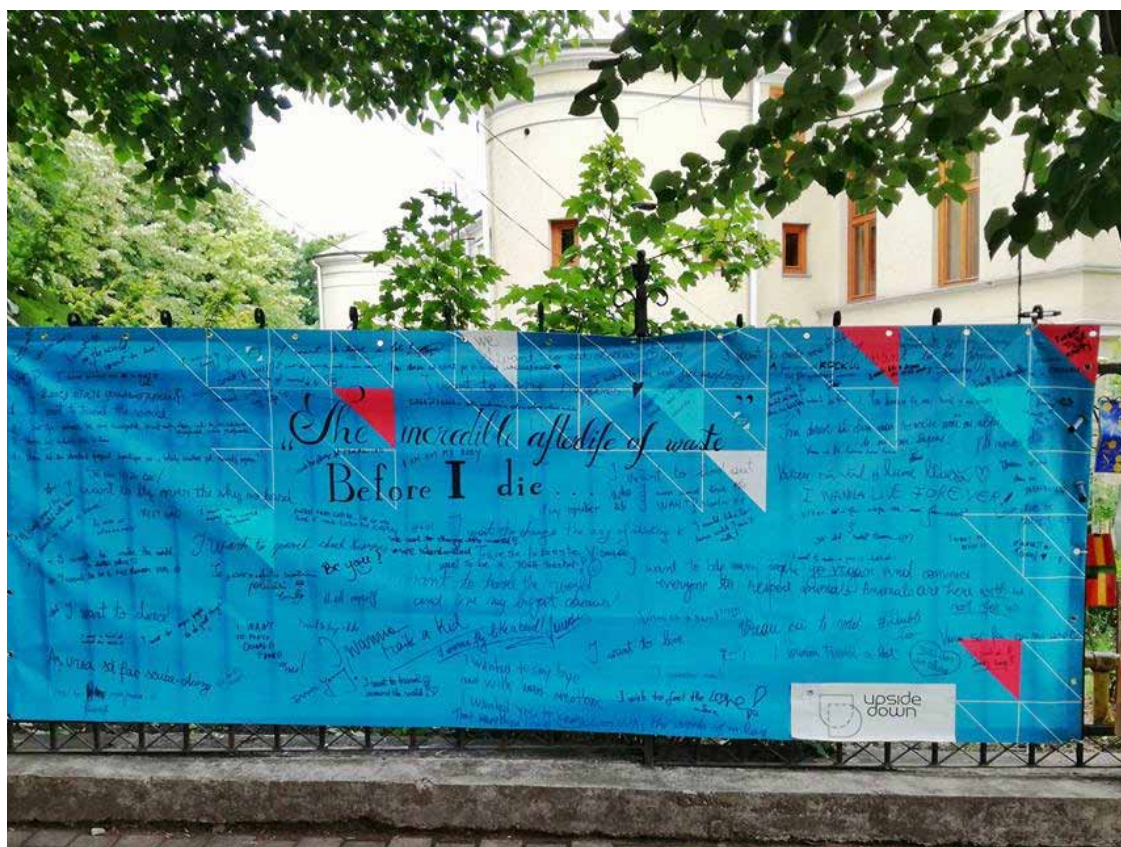
**Retailer:** UpsideDown

**Category:** Upcycling

**Format:** Producer and online

**Website:** [www.upside-down.ro](http://www.upside-down.ro)

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## WHY IS IT INNOVATIVE?

### ▶ India turned them UpsideDown

The young founder of UpsideDown first conceived of upcycling while in India for a six-month marketing internship. There, she was responsible for an environmental project requiring communication strategies and implementation of innovative ideas. She was inspired by Indian culture, where even the poorest people act responsibly and creatively – from the woman on the street asking for money, while wearing a handbag made from rice, to merchants selling glasses made of beer bottles. Newly aware of the impact people can have on nature, she came up with the idea of creating objects from recyclable materials.

Once back in Romania, she gathered a small team, started a business and won the Social Impact Award, a social entrepreneurship competition. UpsideDown quickly became a small, unique, but fast-growing business, manufacturing new objects for personal use from old materials.

### ▶ Quality products with a long lifecycle

These products are not interesting just because they are produced from unconventional materials, they are also high quality, valued by customers for both their durability and quality of materials. From tetra rubber, street banners, truck tarpaulins or used mesh, the UpsideDown team creates wallets, handbags and covers, with a strong personality and individual

name, such as Messenger, Box, Bob Marley Wallets, Mythical Morning, Slim, Freedom of Colors, or Puzzle.

Through this concept, the founders encourage people to act and choose products responsibly, promoting the philosophy of “The incredible afterlife of waste.” This philosophy implies that waste should not be discarded, but recycled and transformed into a whole new product, even better than the original one, thus extending the life of the materials.

Thanks to strong partnerships, the UpsideDown team collects street banners from advertising campaigns and old tarpaulins, which are cleaned and disinfected. Each piece of material is manually cut, so the products are unique and original. Their sewing machines transform the materials into practical products, while also being efficient, with approximately 100 bags and wallets produced from 25 meters of street banners and 28 meters of tarpaulins.

### ▶ Business model

UpsideDown is, for the moment, a pure online player and can virtually reach any city in Romania from its production plant in Iasi. Already a supplier for many cultural events, banks and bookstores, UpsideDown plans to extend the range of products and expand with production plants and exhibitions into new cities, touching more and more people with its philosophy.



## Ebeltoft Group Expert Comment

UpsideDown success is based on the perfect combination of social responsibility, creativity and youth, values transmitted by each object. Consumers feel like they are part of something great when buying the products and tend to slowly adopt the habit of being more responsible about the environment, thus improving their own, and everybody else's, quality of life.

Its positive attitude, the UpsideDown team leaves a powerful mark on every product it spotlights.

France

# Coeur Paysan

Coeur Paysan is a concept launched by 35 local French producers who established a cooperative store to sell their products directly to customers. The range covers most fresh products, including meat, fruits and vegetables, cheese, and more.

The objective is to provide customers directly with fresh local products, eliminate intermediaries and, thus, offer a fair price, fixed by the producers.

For customers, it's the opportunity to both contribute to local producers' success and access the best products at fair prices, with superb flavor and authenticity guaranteed.

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## KEY DATA

**Country:** France

**Retailer:** Coeur Paysan

**Category:** Food/fresh fruits and vegetables

**Format:** 400 sqm

**Website:** [www.coeur-paysan.com](http://www.coeur-paysan.com)

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## WHY IS IT INNOVATIVE?

### ► Fair prices

The products are less expensive, thanks to the direct go-to-market channel, which allows producers to fix their own prices.

### ► Sales on the spot

The store maintains a margin of between 22% to 32%, far lower than in regular stores. To make that possible and meet the authenticity promise, producers commit to being present in-store at least two days per month to sell their products.

### ► Good advice

Farmers are in direct contact with their customers and can provide advice and information.



## Ebeltoft Group Expert Comment

Concepts offering fresh, locally sourced products have been successful for years. What makes Coeur Paysan special is the cooperative model between local farmers and producers, who combine resources. The future will tell how manageable this organization proves to be and how scalable the model is.

Germany: Berlin

# ADIDAS – Knit for You

ADIDAS operated a pop-up store, Knit for You, at Bikini Berlin, a concept shopping mall based in central Berlin, from December 2016 to March 2017. There, customers were able to create their own merino wool sweater, knitted in the pop-up shop within a few hours. ADIDAS plans to evaluate the opportunities of digitalization for reinventing the in-store customer experience and apparel production.

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## KEY DATA

**Country:** Germany: Berlin

**Retailer:** Adidas

**Category:** Apparel production/fashion

**Format:** Pop-up store

**Website:** [www.adidasknitforyou.com](http://www.adidasknitforyou.com)

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## WHY IS IT INNOVATIVE?

### ► Knit for You as a milestone in the Storefactory research project

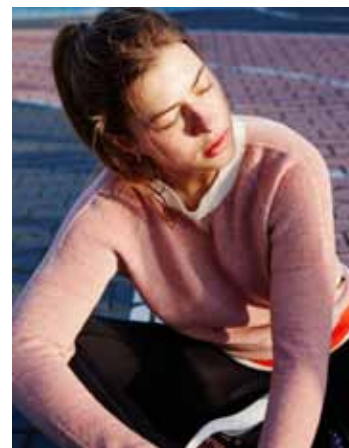
The Knit for You pop-up store was part of the German research project Storefactory, launched in September 2015 and continuing through May 2017. To bring this project to life, ADIDAS cooperated with Friedrich Alexander University Erlangen-Nuremberg (LGDV), RWTH University Aachen (ITA), Uedelhoven Studios Ingolstadt and F.G. Meier GmbH. This joint venture, galvanizing experts from both academic and industrial environments, was developed to achieve a deeper understanding of how flexible production can facilitate digital in-store technology and customization for customers.

### ► Innovative digital features to design custom-made sweaters

The innovative in-store digital architecture enables customers to create and design their own knit sweater. To ensure the perfect fit of a merino wool sweater, ADIDAS offered a body scanner. A private room with motion-responsive projections on the wall inspired customers' design ideas. Consumers were guided through and part of every single step in designing and producing a unique, bespoke, high-quality garment.

### ► Shaping the idea for more sustainable apparel production

ADIDAS demonstrated what garment manufacturing and retailing could be like in the future, with minimal time to market and maximum customer involvement. The wool sweaters were designed with digital in-store technologies and all made to order. The machine knitting, hand finishing, washing and drying takes only a few hours. The production process is efficient, fast and features a high level of personal interaction with the future product, enhancing the customer's appreciation for the new garment.



## Ebeltoft Group Expert Comment

ADIDAS ran an innovative project with its Knit for You pop-up store in Berlin to gauge opportunities for digitalization by reinventing the in-store customer experience, as well as apparel production. The store concept enabled customers to co-create a sustainable, unique and fashionable garment. Retail technology was only there to support the design and production process. This initiative redefined the concept of "fast fashion."

Spain

# Feeding Spain

A concept born from a simple idea: “For every meal you buy, another meal will be provided to someone in need,” Feeding Spain started as a meal-delivery club in 2016. In 2017, it opened a casual restaurant in Barcelona. Prices are affordable and in line with competitors who don’t promote social responsibility.

---

## KEY DATA

**Country:** Spain

**Retailer:** Feeding Spain

**Category:** Meal delivery and restaurant

**Format:** Online club for delivery and small, casual restaurant for dining

**Website:** [www.feedingspain.com](http://www.feedingspain.com)

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## WHY IS IT INNOVATIVE?

### ► Online convenience

In order to commit to the number of meals provided to different collaborating nonprofit organizations, a customer needs to commit to a minimum monthly payment of 45 Euros. Ordering is online, with prepaid credit and next-morning delivery. Prices are per dish and range from 1€ to 8€, including snacks, starters, mains and sides.

### ► Social responsibility

Beyond giving food to those in need, Feeding Spain also employs socially vulnerable people. (Feeding Spain's social responsibility promise does not mention environmental issues or sustainably resourced food.)

### ► Quality food

Meals are prepared from only natural, fresh ingredients and cooked slowly at a low temperature, a culinary technique allowing food to cook in its own juices, preserving flavor. Then, they are sealed and pasteurized, and should be edible for from six to 20 days. Each meal comes with custom instructions on how to best prepare it for consumption. Recipes are mainly traditional Mediterranean and include vegetables, rice, fish and meat.

### ► Restaurant

Recently, Feeding Spain opened a casual restaurant in Barcelona, on a central neighborhood side street, away from crowds and tourists. The concept offers a set three-course menu that changes daily, to eat in or take away in a bento box. A meal costs 12 Euros, which is average for a set menu price in the city. For every set menu or bento box purchased, a meal is donated to a selected nonprofit organization.



## Ebeltoft Group Expert Comment

Similar initiatives seem to be working in the Spanish market, where traditional food is important and current lifestyles do not allow people to slow-cook at home daily. Feeding Spain has a strong social responsibility component that others lack, but the monthly commitment may put people off. The company needs to counteract this with a wide and constantly changing variety of dishes and great service. It also needs to improve publicity, boosting the use of its Facebook feed as a primary tool for visibility.

Spain

# OBBIO

OBBIO is a healthy-living facilitator. More than a supermarket, with 8,000 items, ranging from organic fresh food to chemical-free cosmetics, OBBIO offers healthy meals to eat in or take away all day. The company wants to be customers' healthy-living partner and help them successfully transform their daily habits into healthier ones.

---

## KEY DATA

**Country:** Spain

**Retailer:** OBBIO

**Category:** Healthy living

**Format:** Supermarket and coffee shop

**Website:** [www.obbiofood.com](http://www.obbiofood.com)

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## WHY IS IT INNOVATIVE?

### ► Food philosophy

OB BIO believes healthy living is a commitment to oneself and the environment and wants to prove "healthy" doesn't mean a compromise on variety or flavor. In the 700 sqm of organic products offered, 90% of the fresh produce is local. The most important rule: It has to be tasty.

### ► Coffee shop philosophy

It's a place for everyone, not just hippies and health fanatics, for trying different ingredients in prepared dishes and discovering that healthy eating is also tasty. Meals are cooked on site with ingredients sold in-store, and are priced by weight. Options change every three days.

### ► Cosmetic philosophy

The skin needs healthy nutrition and supplements, so OB BIO carries the widest range of chemical-free cosmetics and natural supplements in Barcelona.

### ► Expertise and teaching philosophy:

All employees are healthy-eating experts and advise on seasonal products and supplements. Members of the loyalty program can meet with a nutritionist or attend an event/workshop covering topics such as "Know your superfoods and their benefits" and "Ketogenic diet and cancer." There also is a healthy-living library.



## Ebeltoft Group Expert Comment

They bring healthy eating and living to new customers who may have an interest, but lack knowledge, through familiar concepts:

- a supermarket with expert advice and a full range of products and services
- a coffee shop where you can spend time and try new foods
- a loyalty program with informational events and workshops.
- 360° health, accessible for everyone.

U.S.A.

# Reformation

Reformation started in 2009 with limited-edition collections made in Los Angeles. It sources sustainable fabrics and vintage garments, while incorporating better practices throughout the supply chain, thus causing a fraction of the environmental impact of conventional fashion brands. It is spearheading and inspiring a sustainable way to be fashionable. The majority of fashion is designed 12-18 months before it is released, but, at Reformation, a sketch becomes a dress within a month. Designing eco-friendly fast fashion and making what customers want to wear right now supports its mottos: “Make killer clothes that don’t kill the environment” and “Making sustainability and self-confidence cool again.”

Reformation is building its business by expanding on its mission to make eco-friendly fast fashion. Since its inception online and opening its first privately owned factory in Los Angeles in November – a 120,000-sq.ft. space converted to be sustainable - Reformation has moved 80% of its production there, producing the other 20% offshore or at surrounding L.A. manufacturers. As a result, the brand is able to get items from development to both online and brick-and-mortar locations in as little as four weeks.

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## KEY DATA

**Country:** U.S.A.

**Retailer:** Reformation

**Category:** Fashion

**Format:** E-commerce/stand-alone shop

**Website:** [www.thereformation.com](http://www.thereformation.com)

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## WHY IS IT INNOVATIVE?

### ► Making the old new again

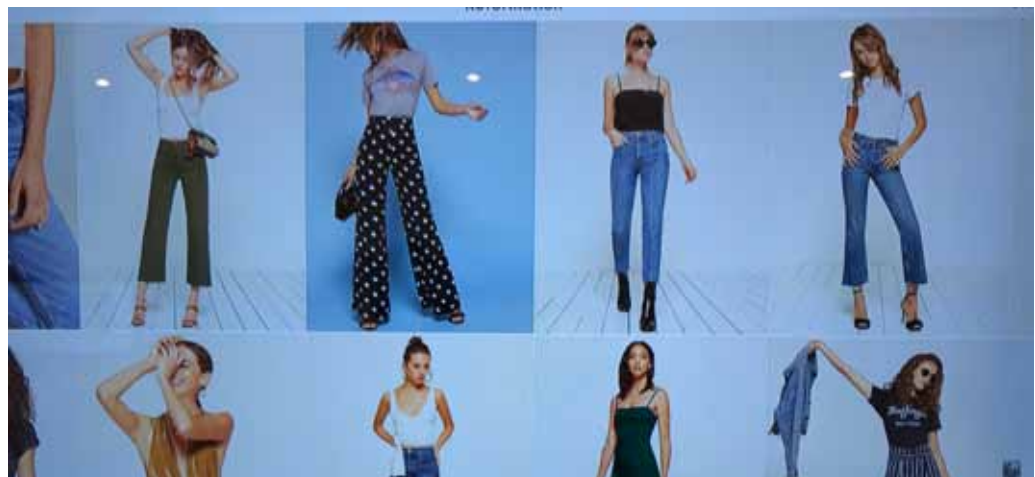
Bringing innovation and sustainability to clothing: All pieces are made from super-sustainable materials, rescued deadstock fabrics and repurposed vintage clothing.

### ► Abracadabra!

From clicks to bricks: In addition to stand-alone stores, Reformation opened its techy store concepts in California and New York, incorporating digital screens reflecting the brand's e-commerce store, as well as a "magic wardrobe" feature that enables the brand to sort its assortment on the sales floor based on product performance.

### ► Doing it right

The brand's ethos is to combine ethical clothes, really great value and dramatic improvement related to sustainability, sometimes a rare find in the retail market.



## Ebeltoft Group Expert Comment

Reformation takes an empowering and eco-friendly approach to reaching consumers. Its mottos are: "Creating a killer clothing line, that doesn't kill the environment" and "Making sustainability and self-confidence cool again." Reformation eliminates retail markups by exclusively selling online and at its own boutiques, creating a natural buzz to purchase new products when they launch.

U.K.

# Farmdrop

Farmdrop is a disruptive, online food-delivery company that distributes food from local farmers, fishermen and food producers directly to consumers. It was founded in 2012 and currently serves the London market, with ambitious plans to open more city hubs. Its model aims to return a better price to smaller, local producers by removing complexity (and the major supermarkets) from the supply chain. At the same time, Farmdrop's click-to-harvest model, combined with its zero-emissions fleet, offers high efficiency and sustainability, moving produce to the consumer five times faster than a supermarket.

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## KEY DATA

**Country:** U.K.

**Retailer:** Farmdrop

**Category:** Grocery

**Format:** Online

**Website:** [www.farmdrop.com](http://www.farmdrop.com)

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## WHY IS IT INNOVATIVE?

### ► Sustainable stewardship

The producers that Farmdrop selects are primarily smaller and practice sustainable methods, such as frequently rotating crops and preserving hedgerows and wildflowers, to support the natural ecosystem. This sets it apart from more aggressive agricultural practices that work the land more intensively to improve yield and profitability in a supermarket-led supply chain.

### ► Click-to-harvest model from local suppliers

The majority of the produce Farmdrop sells comes from within 150 miles of London. Harvests are performed only after an order is placed, so there is no need to store fresh food and none wasting in distribution centers.

### ► Sustainable values throughout the supply chain

As well as working with sustainable suppliers, Farmdrop uses zero-emissions vans and reusable packaging. That, in addition to the fast-moving supply chain, reduces emissions and food miles. It also means that the food delivered to customers is fresher, which reduces waste at the user end.



## Ebeltoft Group Expert Comment

Farmdrop combines consumers' growing desire for grocery home delivery with a clear answer to the industry's growing pressures around sustainability, prices fair to food producers and waste reduction.

The company was established with a clear mandate to "fix the U.K.'s food chain." Farmdrop's new approach to food retailing cuts out middlemen and shares the benefits with customers, who enjoy fresher, healthier food at lower prices, and smaller-scale producers, who enjoy better trading terms, receiving 70-75% of the retail price, rather than 25%-50%.

At a time when supermarkets' value proposition remains in question, Farmdrop provides U.K. consumers with an attractive alternative that rebalances transaction to be fair to the environment, producer and end-consumer.

The Netherlands

# Happy Tosti

Happy Tosti is a socially responsible lunch restaurant that aims to make everyone happy, just as the name implies, including customers and employees. Happy Tosti serves sandwiches made and served by employees who have disabilities.

This concept offers work opportunities to a vulnerable population. Thus, the restaurant serves a socially responsible mission, as well as creates a positive social environment. In addition, the menus incorporate many organic, healthy, high-quality products.

---

## KEY DATA

**Country:** The Netherlands

**Retailer:** Happy Tosti

**Category:** Food

**Format:** A sociable, socially responsible lunch restaurant

**Website:** [www.happytosti.nl](http://www.happytosti.nl)

---



## WHY IS IT INNOVATIVE?

### ► Plenty of happiness to go around

Happy Tosti combines aspects of commerce and social responsibility in a unique and successful way.

### ► Fun ambiance

Happy Tosti distinguishes itself by its appearance, as well as its hiring philosophy. The decor and open kitchen connect guests with employees. Art made by employees adds another fun element to the restaurant, which evokes the curiosity of passersby.

### ► Making the world better

The founders of Happy Tosti inspire other companies to contribute to a better – more socially positive and socially responsible – world.



## Ebeltoft Group Expert Comment

At Happy Tosti, it's all about food made and served by a happy staff, whose members have disabilities that make them "different." Employees train each other, knowing how to bring out the best in similar people. The combination of high-quality products and enthusiastic, friendly service brings customers an unforgettable experience. By clearly explaining its story, the restaurant gives customers a reason to specifically choose Happy Tosti when they're hungry. A visit to Happy Tosti makes you happy too, even when something goes wrong or takes a little longer. The growing number of stores shows that this concept works.

The Netherlands

# Bellamy Gallery

Bellamy Gallery returns to the essence of retail: the best product for the best price. No mysterious margins, just complete transparency about price structures on the price tags. No extra channels, but direct from producer to consumer.

Bellamy Gallery wants to make quality available to as many consumers as possible. It does so by combining high-quality key pieces with discounted retail prices: smart, affordable luxury.

Transparency goes beyond price. The price tag features a picture of the connected supplier. All suppliers are from Europe, which guarantees quality, as well as a contribution to the European economy.

---

## KEY DATA

**Country:** The Netherlands

**Retailer:** Bellamy Gallery

**Category:** Fashion

**Format:** Smart, affordable luxury

**Website:** [www.bellamygallery.com](http://www.bellamygallery.com)

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## WHY IS IT INNOVATIVE?

### ► **Make an impact by making less impact**

Bellamy Gallery stimulates sustainability. One of its most important functions is to inspire people to use their garments longer and minimize their personal impact on the planet.

### ► **Make it last**

Bellamy Gallery urges people to buy higher quality, buy less and use garments longer. It does so by making people aware that when they wear their clothes twice as long as they used to, they are reducing CO<sub>2</sub> emissions by 24%.

### ► **Make it obvious**

Bellamy Gallery is completely transparent about price structure and shows the margin model on the price tag of every single product.



## Ebeltoft Group Expert Comment

Transparency has become more important. We believe Bellamy Gallery is a great example of how transparent a brand can be about its prices and suppliers. By combining pop-up stores with permanent stores and the online channel, it is present at the right time, at the right place. This concept proves that two women experienced in retail can implement a new concept that both fits customer demand and contributes to sustainability.

Denmark

# Veras Copenhagen

Veras Copenhagen is an online circular clothing concept, where customers basically share their closets with each other. For a monthly membership fee, customers are free to swap and exchange clothes, shoes and accessories as much as they wish. They can bring in their own clothes, for which they receive points that function as currency to buy other items. Points can also be bought, if customers do not have enough for a certain item.

---

## KEY DATA

**Country:** Denmark

**Retailer:** Veras Copenhagen

**Category:** Clothing

**Format:** Online + 1 stand-alone store/  
showroom

**Website:** [www.verascopenhagen.dk](http://www.verascopenhagen.dk)

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Photos: Veras Copenhagen

## WHY IS IT INNOVATIVE?

### ► Easy to do

With the slogan “Your online wardrobe – just at your fingertips,” Veras Copenhagen is making responsible consumption smart by digitizing the secondhand shopping process through a subscription service at a very low cost (only 59 DKK/month or 9 USD/month). The clothing exchange concept sets new standards for the sharing economy by enabling Danes to swap clothes through a simple point system.

### ► Low cost

Ensuring a very simple shopping experience, Veras also offers free delivery and shipping. Once per month, members can receive up to 5 kg via delivery service GLS and ship the same amount themselves to Veras for free. Customers can also drop and pick up clothes at the physical store that functions as a showroom. They are free to choose whichever option is more convenient for them.

### ► Customers trade up

Veras brought the concept to Denmark’s biggest music festival, Roskilde, where members could swap their dirty rags for new clothes in a pop-up shop – a good way to bring in new members. Festival-goers also had the opportunity to buy a membership valid for the duration of the festival.



## Ebeltoft Group Expert Comment

Veras Copenhagen conceptualized a contemporary way to buy clothes with a clear conscience. Every aspect of the process takes place online. Veras makes it easy and manageable for consciously-responsible consumers to buy and swap secondhand clothing.

Veras Copenhagen is an excellent example of how responsible clothing consumption can be modernized and made easy, eliminating having to spend hours searching messy secondhand stores for the next vintage bargain, or spending valuable time trying to sell it through user-to-user platforms.

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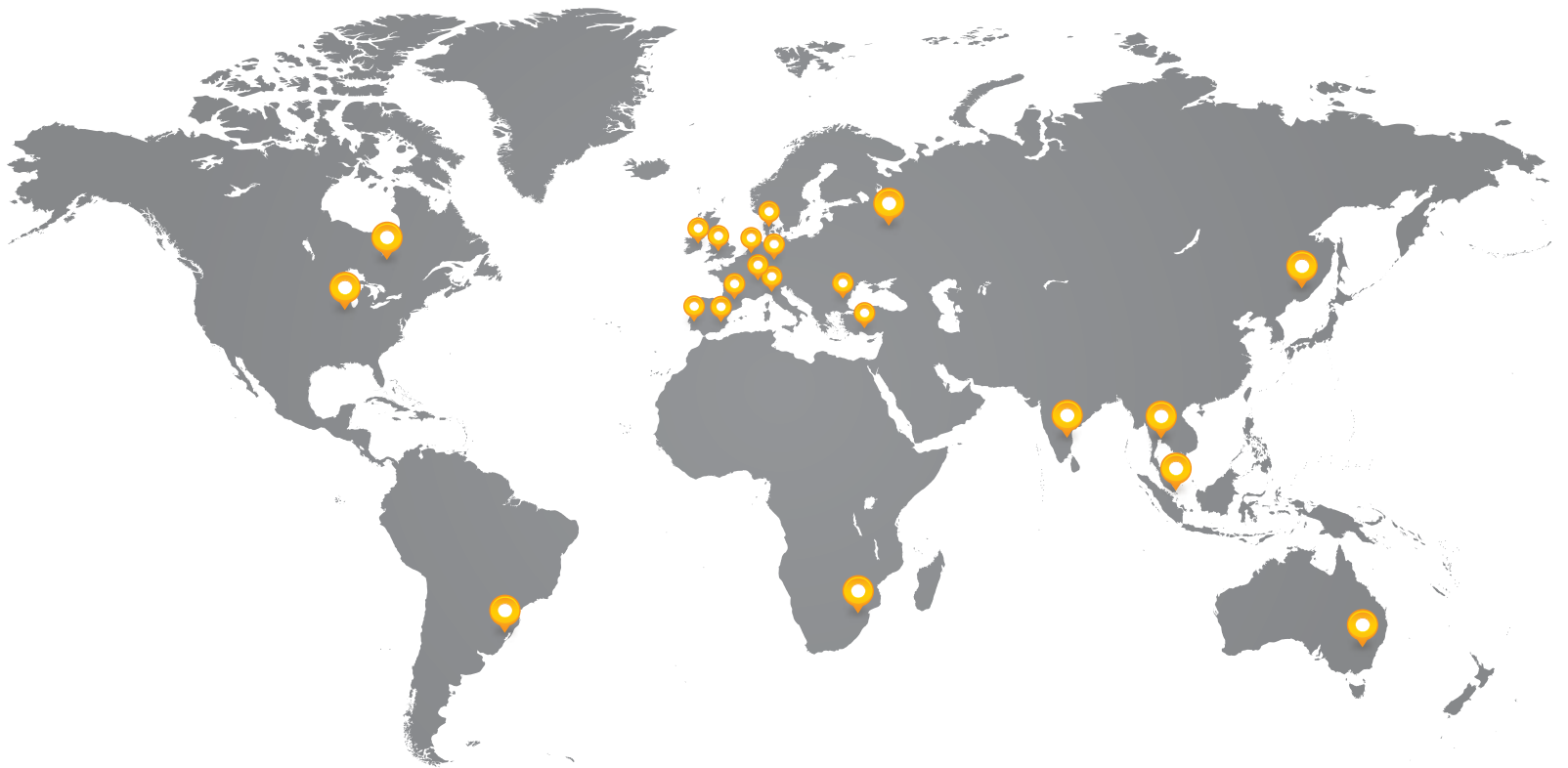
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# 2018

## Global Retail Trends & Innovations

### INNOVATING FOR CUSTOMERS

For the past 13 years, Ebeltoft Group has been tracking innovative retail concepts across the globe. Many factors are pushing retailers to accelerate the rhythm of their reinvention: digitalization and retail-tech creativity; new, more horizontal relationships between brands and customers; and the surge toward radical differentiation in stagnating markets.

In addition to new game-changing retailers developing disruptive formats, more traditional retailers have launched reinvention as well. The 26 member companies of Ebeltoft Group witness this through consulting projects across all regions, formats and industries. Retailers are racing to create new formats, offer new added values and explore new frontiers. Global Retail Trends & Innovations highlights a selection of these bold initiatives.

What Global Retail Trends & Innovations also does is demonstrate the intimate involvement of the customer in the innovation process. If technology remains a major driver for innovation, it must be applied usefully to serve consumer needs. Most of the innovations showcased in this issue rely on a deep, intimate understanding of how people live, dream and shop.

What if the next retail revolution is...the customer?

Vive le commerce!

### Ebeltoft Group International Retail Experts

We are a global alliance of retail consulting companies with member companies in more than 25 mature and emerging retail markets.

Since 1990, we have been helping retailers and their suppliers remain competitive and achieve their goals by blending global retail expertise with members' local insight. Ebeltoft Group serves 36 of the top 100 retailers and 29 of the top 50 manufacturers worldwide.

Ebeltoft Group's global studies and publications include Horizontal Retail (2017), Services at Retail (2017), Global Cross Channel Report (2014), Retail Internationalization (2013), NeoConsumer (2011), The Trust Factor (2011) and Environmental Sustainability (2010).

For a personal presentation about current retail innovations, trends and cases, or information about our latest global publications, research and services, please contact Ebeltoft Group or visit [www.ebeltoftgroup.com](http://www.ebeltoftgroup.com)

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