

Stores and Shoppable Media

How Personality, Purpose, and Publishing Create Unified Customer Experiences

More screens, more shopping

With the proliferation of desktops, laptops, mobiles, tablets, and smart TVs, there are more opportunities for people to shop anywhere and at any time.



Ecommerce



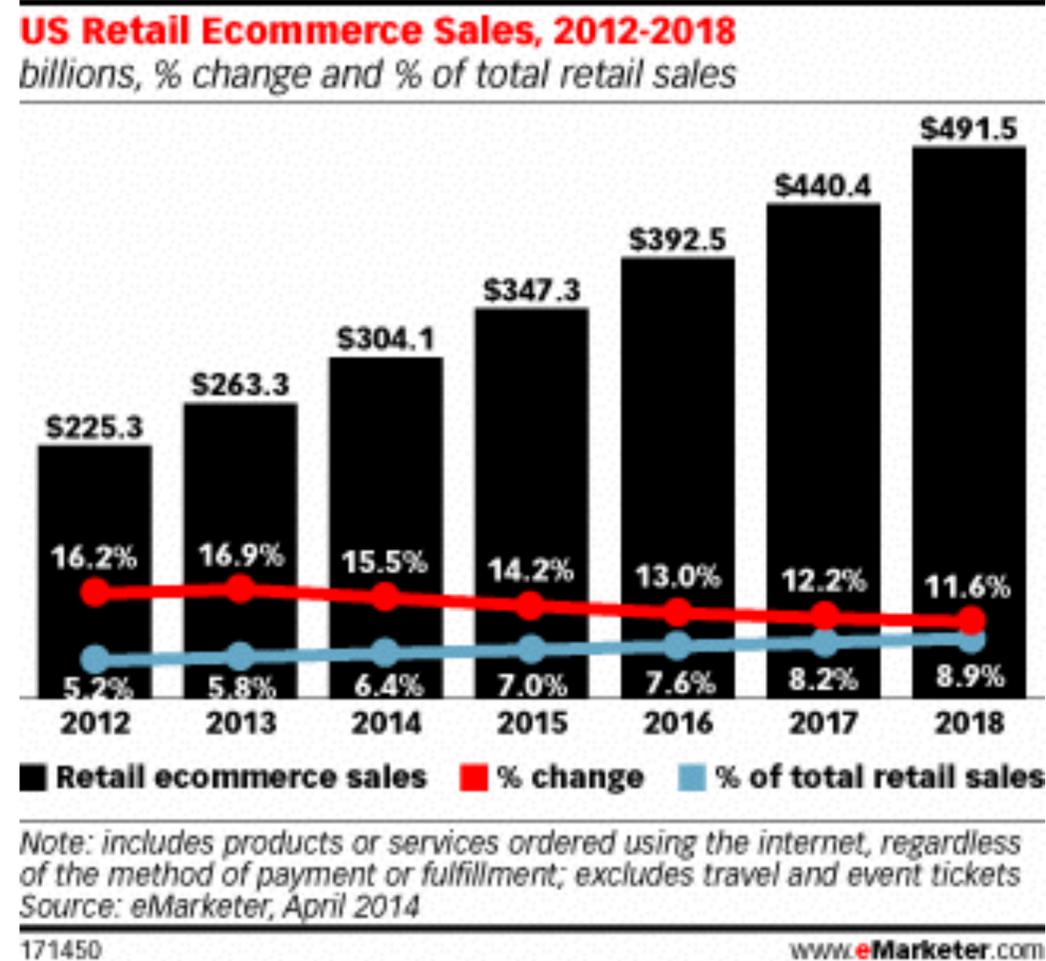
Mcommerce



Tcommerce

But ecommerce doesn't *have* to compete with brick-and-mortar

It's no surprise that ecommerce and mcommerce are growing, but brick-and-mortar stores aren't dead yet, accounting for \$4.27 trillion in sales in 2013.



US Retail Sales, by Channel, 2012-2017
billions and % change

	2012	2013	2014	2015	2016	2017
Ecommerce*	\$225.3	\$263.3	\$304.1	\$347.3	\$392.5	\$440.4
—% change	16.2%	16.9%	15.5%	14.2%	13.0%	12.2%
Non-ecommerce	\$4,125.0	\$4,269.5	\$4,428.2	\$4,588.5	\$4,740.7	\$4,898.2
—% change	4.6%	3.5%	3.7%	3.6%	3.3%	3.3%

Note: excludes travel and event tickets; *includes products or services ordered using the internet, regardless of the method of payment or fulfillment
Source: eMarketer, April 2014

171448 www.eMarketer.com

US Retail Mcommerce Sales, 2012-2018

	2012	2013	2014	2015	2016	2017	2018
Retail mcommerce sales (billions)	\$24.78	\$42.13	\$57.79	\$76.41	\$98.12	\$114.50	\$132.69
—% change	82.6%	70.0%	37.2%	32.2%	28.4%	16.7%	15.9%
—% of retail ecommerce sales	11.0%	16.0%	19.0%	22.0%	25.0%	26.0%	27.0%
—% of total retail sales	0.6%	0.9%	1.2%	1.5%	1.9%	2.1%	2.4%

Note: includes products or services ordered using the internet via mobile devices, regardless of the method of payment or fulfillment; excludes travel and event tickets; includes sales on tablets
Source: eMarketer, April 2014

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Successful retailers integrate points of sale to create a consistent customer experience

“With multichannel marketing comes new opportunities to move away from ‘pushing’ marketing messages, to encouraging true dialogue with consumers that promote greater brand awareness, deeper loyalty and higher returns on investment (ROI).”

- Experian

Retailers typically adopt one of “three P’s” across platforms

Points of Sale

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graph TD; A[Points of Sale] --> B[1 PERSONALITY: A persona that makes retailer appear more approachable and "human"]; A --> C[2 PURPOSE: An emphasis on functionality, efficiency, and convenience]; A --> D[3 PUBLISHING: A provider of rich content, such as videos and articles, which give more context to the products];
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1

PERSONALITY:

A persona that makes retailer appear more approachable and “human”

2

PURPOSE:

An emphasis on functionality, efficiency, and convenience

3

PUBLISHING:

A provider of rich content, such as videos and articles, which give more context to the products

Personality, purpose, and publishing in practice

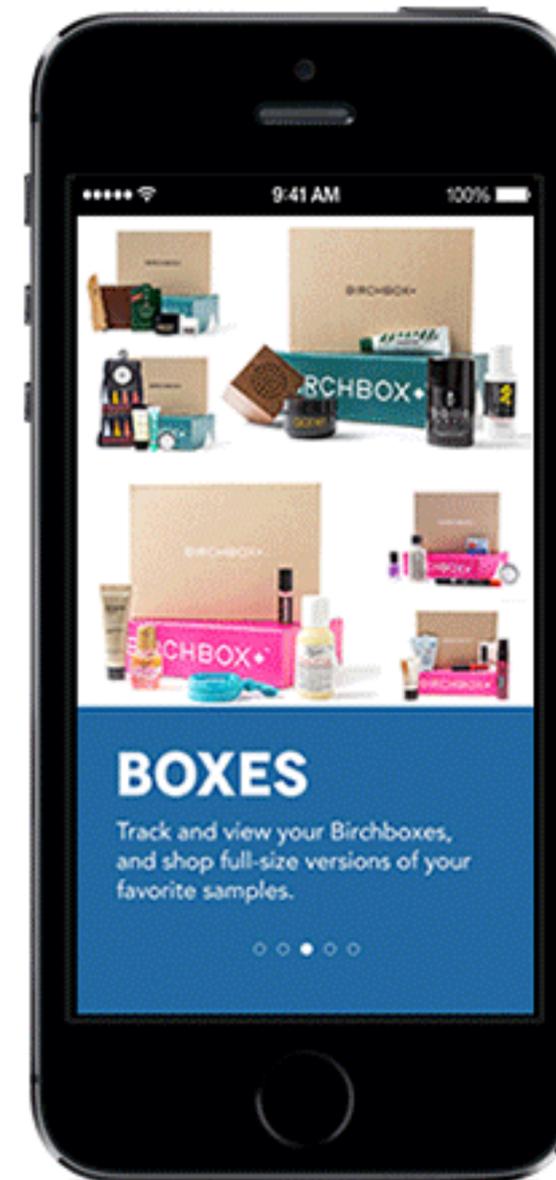
	RETAILER	ORIGIN	Online	Mobile App	Brick and Mortar	Television
Personality	BIRCHBOX♦	Online	✓	<u>✓</u>	✓ (1st NYC July 2014)	
	WARBY PARKER eyewear	Online	<u>✓</u>		✓	
Purpose	amazon.com®	Online	✓	<u>✓</u>	✓ (San Francisco Only)	✓
	Walmart Save money. Live better.	Brick and Mortar	✓	<u>✓</u>	✓	
Publisher	HSN	Television	✓	<u>✓</u>	✓ (Outlet Stores)	✓
	LOWE'S	Brick and Mortar	✓	✓	✓	

Birchbox acts as a makeup-savvy friend

Subscription-based makeup discovery company Birchbox infuses all its platforms with the personality of a friend who knows what you just *have* to have.

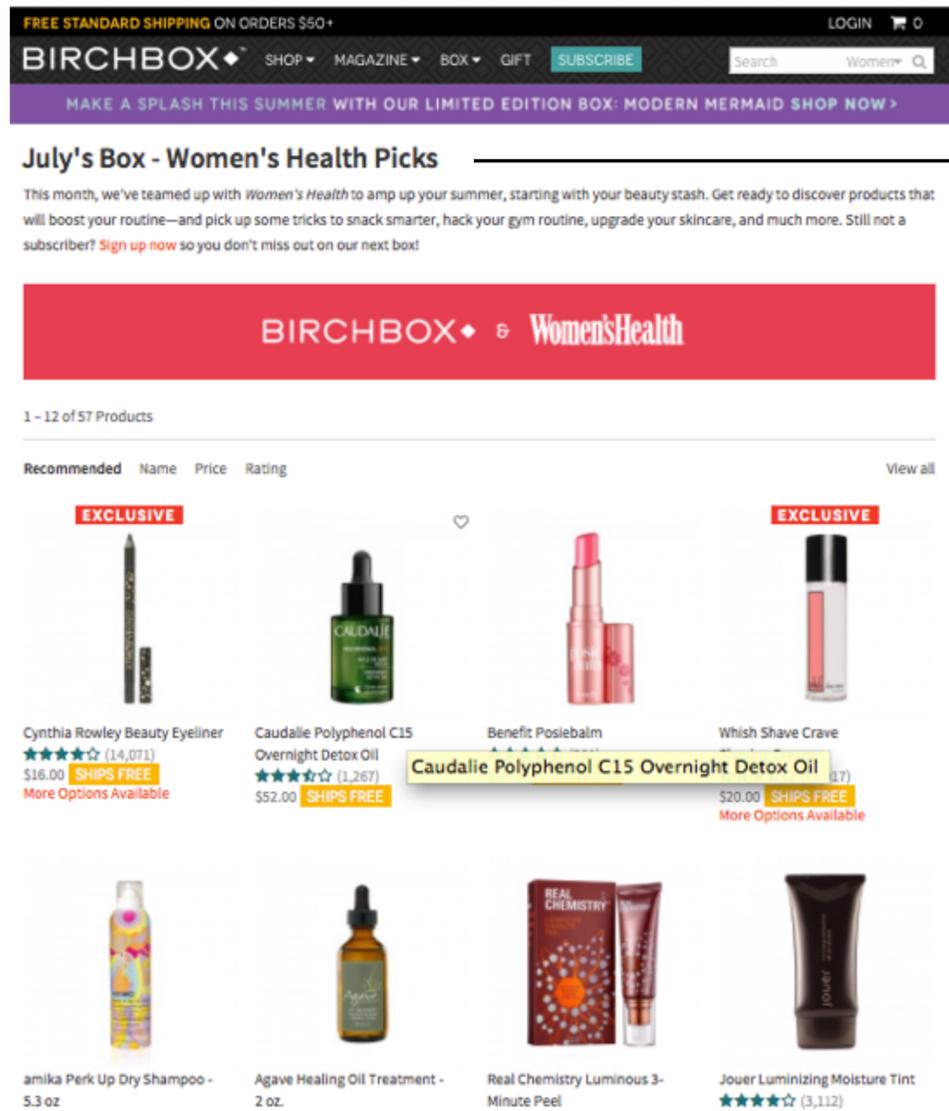
Shopping is always organized by type of product, not brand, giving the user more control over their experience. And both the website and app show a virtual representation of the customer's personalized box, streamlining purchasing.

In July 2014, Birchbox launched its first brick-and-mortar store in New York City. In addition to maintaining a product-first layout, it calls back to its online origins by incorporating iPads for reviews and real-life tutorials. The store will also help their online store conversions—heat mapping, cameras, and eventually, WiFi tracking will be used to help the company understand what people want to buy.

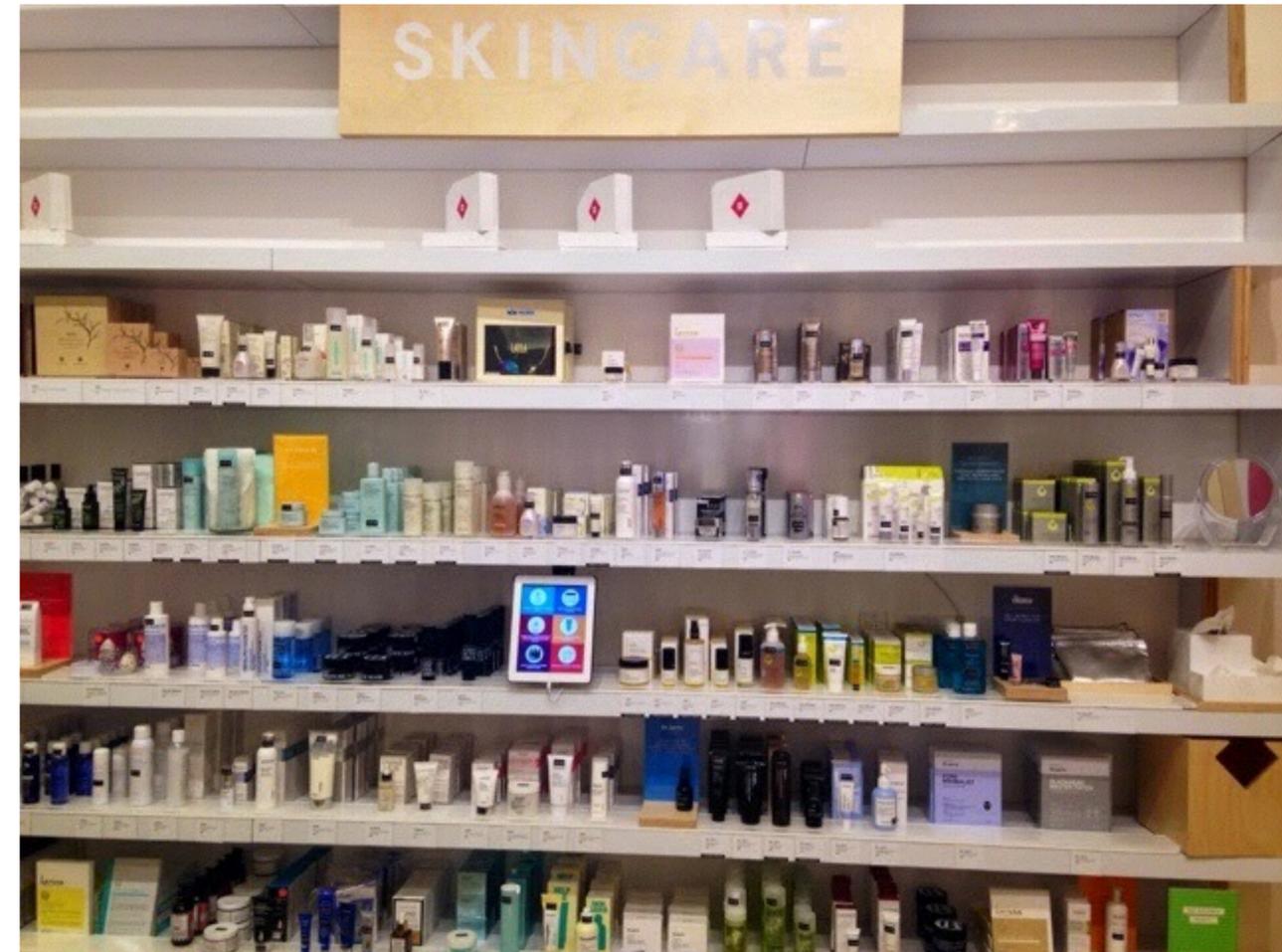
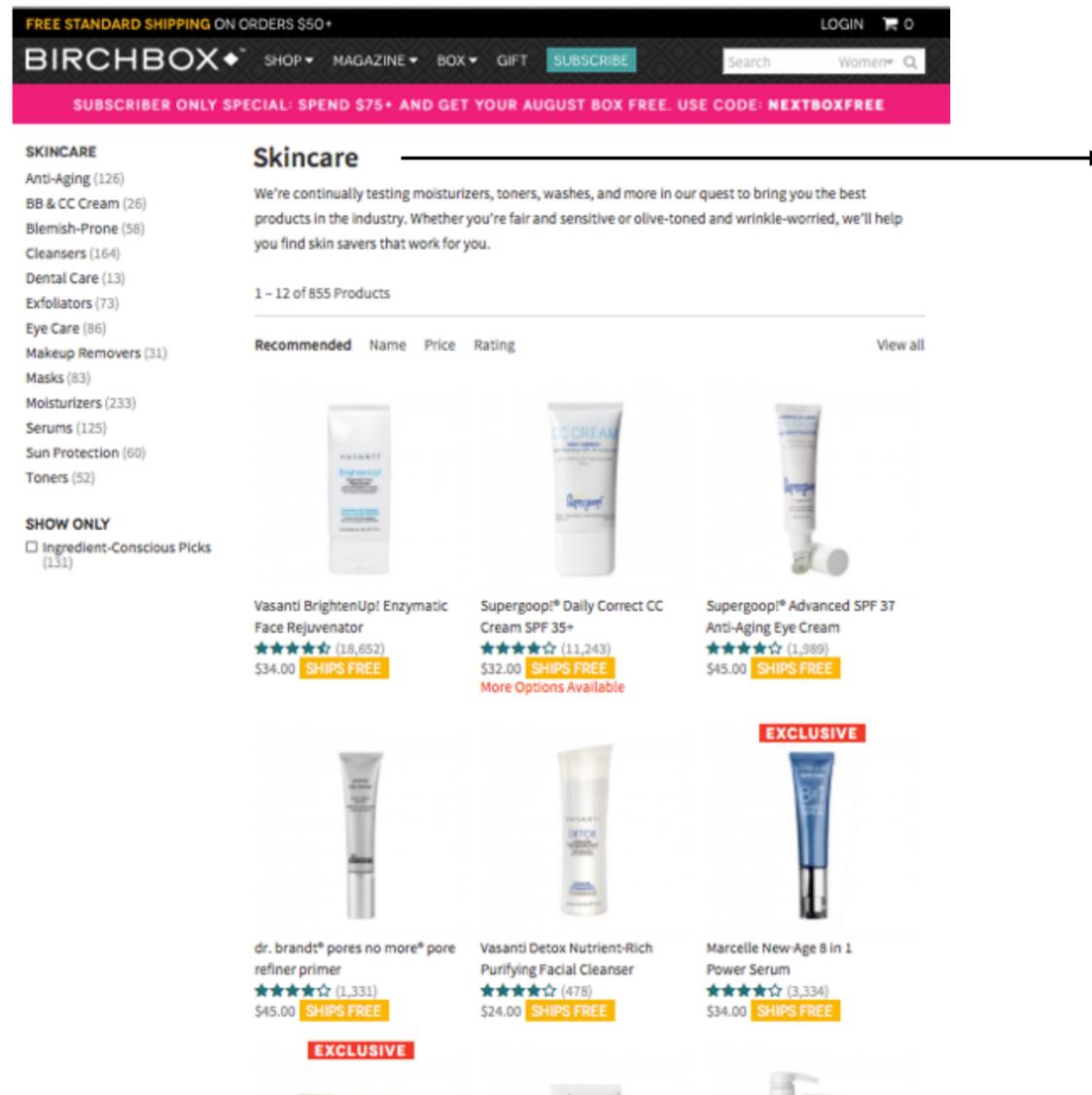


Source: Birchbox

The Birchbox store mimics the website layout



The Birchbox store mimics the website layout

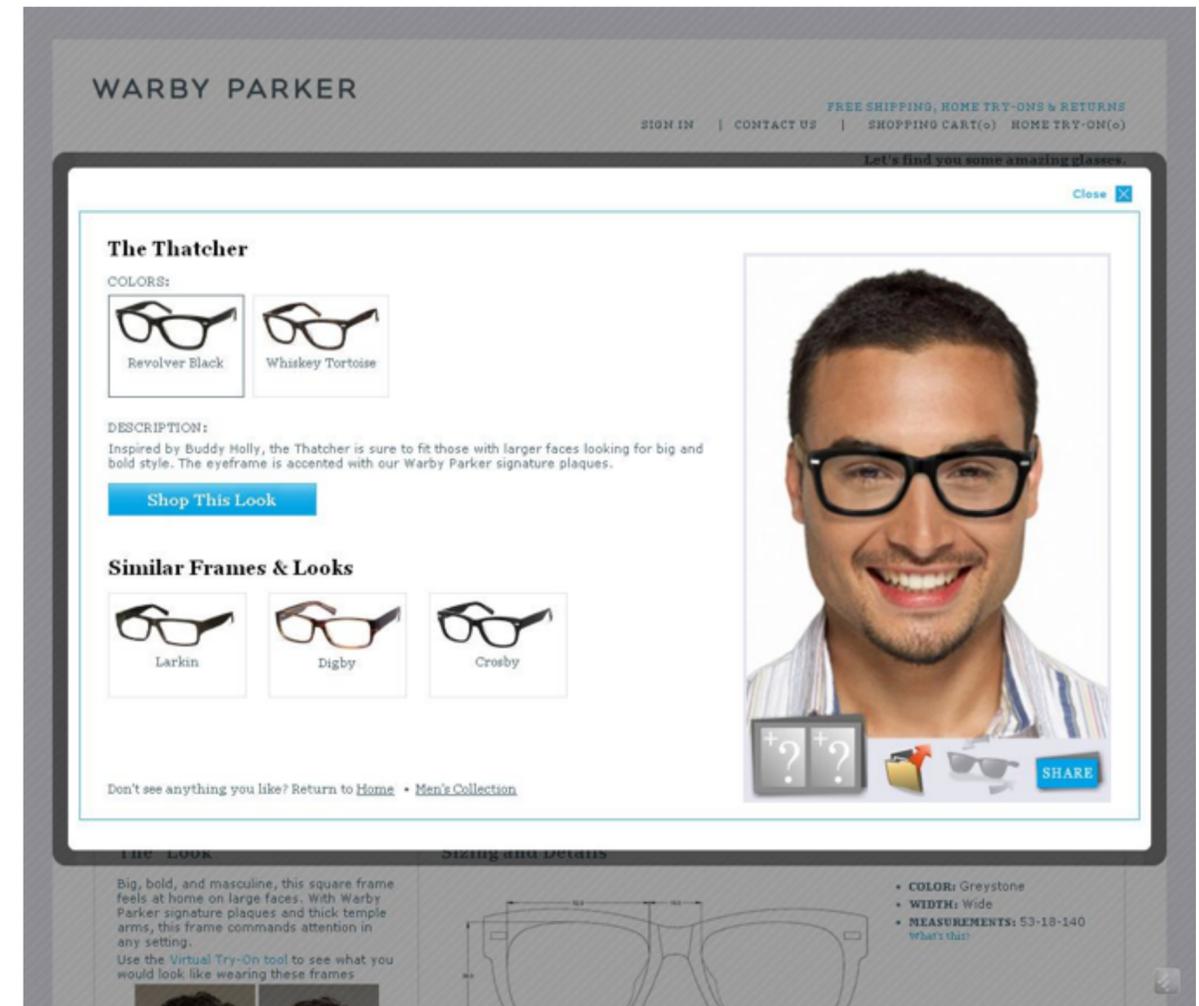


Warby Parker is the eyeglass-industry insider

Warby Parker simplifies the process of buying eyeglasses by acting as an ethical expert.

The ecommerce platform explains glasses production, why they should only cost \$95, and which frames look best on the customer. Visitors can also peek “behind the scenes” to see what the Warby Parker team is doing, contributing to its branding as a transparent company. Customers have the option to virtually try on glasses and are encouraged to send pictures to their friends for feedback before ordering.

Like Birchbox, Warby Parker has also moved into brick-and-mortar but retained its online personality. Customers can try on glasses in person, take pictures, and get feedback from friends, but (depending on the store) are directed to iPads or desktops to complete the purchase. This allows the company to better track consumer preferences, and provide a more personalized experience both in-store and online



Source: [Warby Parker](#)

Warby Parker directs in-store shoppers online

The screenshot shows the Warby Parker website homepage. At the top, there is a navigation bar with links for 'WARBY PARKER', 'MEN', 'WOMEN', 'LOCATIONS', 'OUR STORY', and 'BLOG'. A secondary navigation bar includes 'Free shipping, free returns', 'HELP', 'LOG IN', and 'CART (0)'. The main hero section features a large image of a woman and a man wearing sunglasses and glasses, respectively. Text overlays on this image include 'GOOD IN THE AIR. GOOD ON LAND.', 'INTRODUCING LIMITED-EDITION AVIATORS FROM WARBY PARKER x INTO THE GLOSS', and 'MEET THE FOUNDERS, SHOP THE COLLECTION >'. Below the hero image, there are three promotional tiles: 1) 'KARLIE KLOSS x WARBY PARKER' featuring 'MARPLE' sunglasses and a 'SHOP THE COLLABORATION' link. 2) 'Have a good look' featuring two pairs of glasses and a 'SHOP MEN'S OPTICAL >' link. 3) 'HOME TRY-ON' offering '5 days, 5 pairs, 100% free' with a 'GET STARTED' button. A 'DO GOOD' section states 'For every pair purchased, a pair is distributed to someone in need' with a 'LEARN MORE >' link. At the bottom, there are three icons with text: 'FIND A STORE' (We might be in your neighborhood), 'GIVE A GIFT CARD' (Everyone loves a present. Here's a good one.), and 'BROWSE THE BLOG' (What we're reading, writing, making, and doing.). A footer contains 'SUNGLASSES', 'EXPLORE HISTORY HELP', and 'CONNECT SIGN UP FOR EMAILS'.



Walmart focuses on frugality

Walmart has successfully applied their low-cost positioning across multiple media platforms, bringing “big box” shopping to smaller digital screens. Every point of sale (brick-and-mortar, website, and app) directly relates to maximizing the customer’s budget.

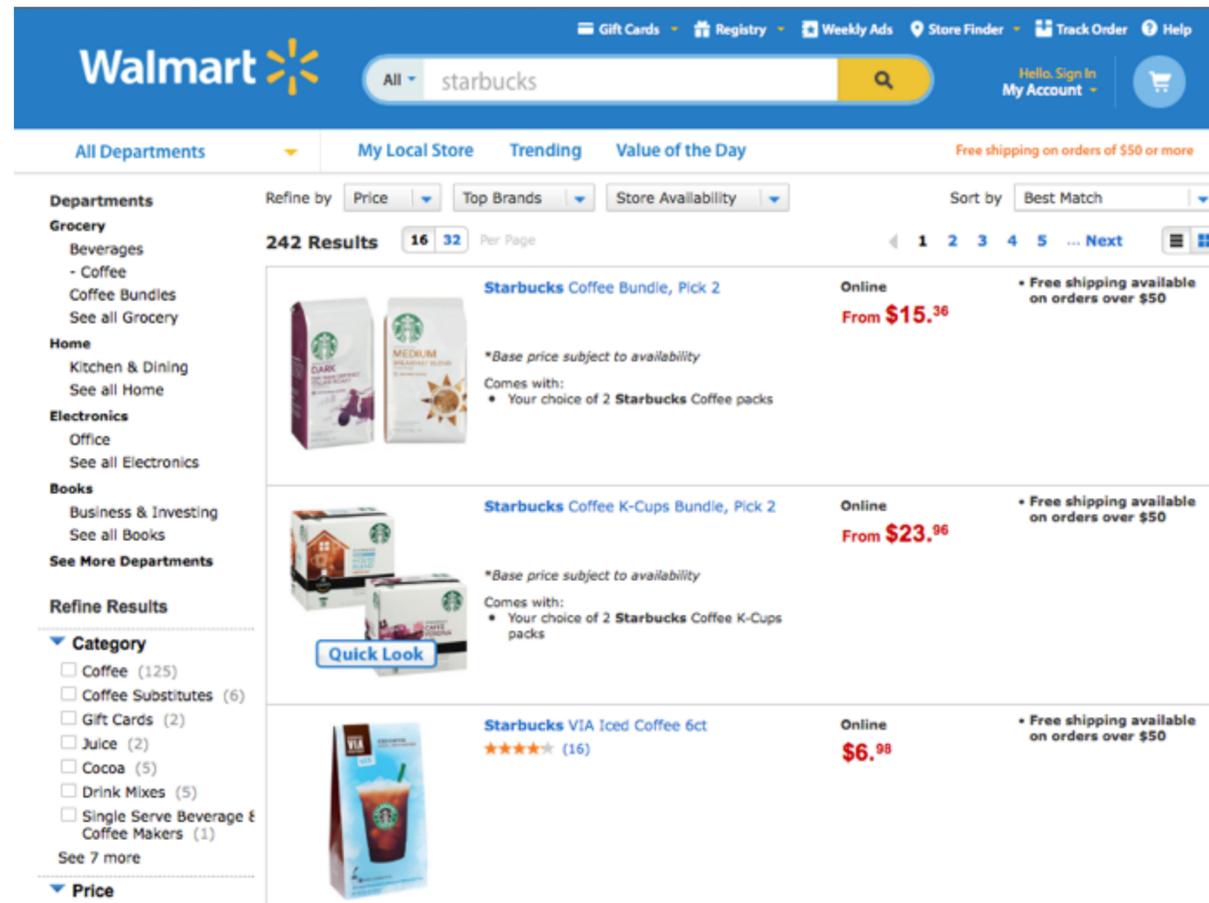
Saving starts before customers ever enter the brick-and-mortar store: the app and mobile site deliver early access notifications on deals at the user’s local store. Customers can then create a shopping list in the app, and compare pricing and availability in-store and online. Once in store, users can scan products for peer reviews to guarantee they’re getting their money’s worth.

Walmart is also taking steps to equip stores with iBeacon technology, which has the potential to alert customers to on-shelf deals.



Source: [Walmart](#)

Savings-oriented across platforms



Amazon makes purchase fast and frictionless

Amazon's goal is to deliver everything faster, making purchases as effortless as possible. Online, this has manifested itself as options such as 1-click check out and prime shipping, but has led to new opportunities as the company has expanded into devices:

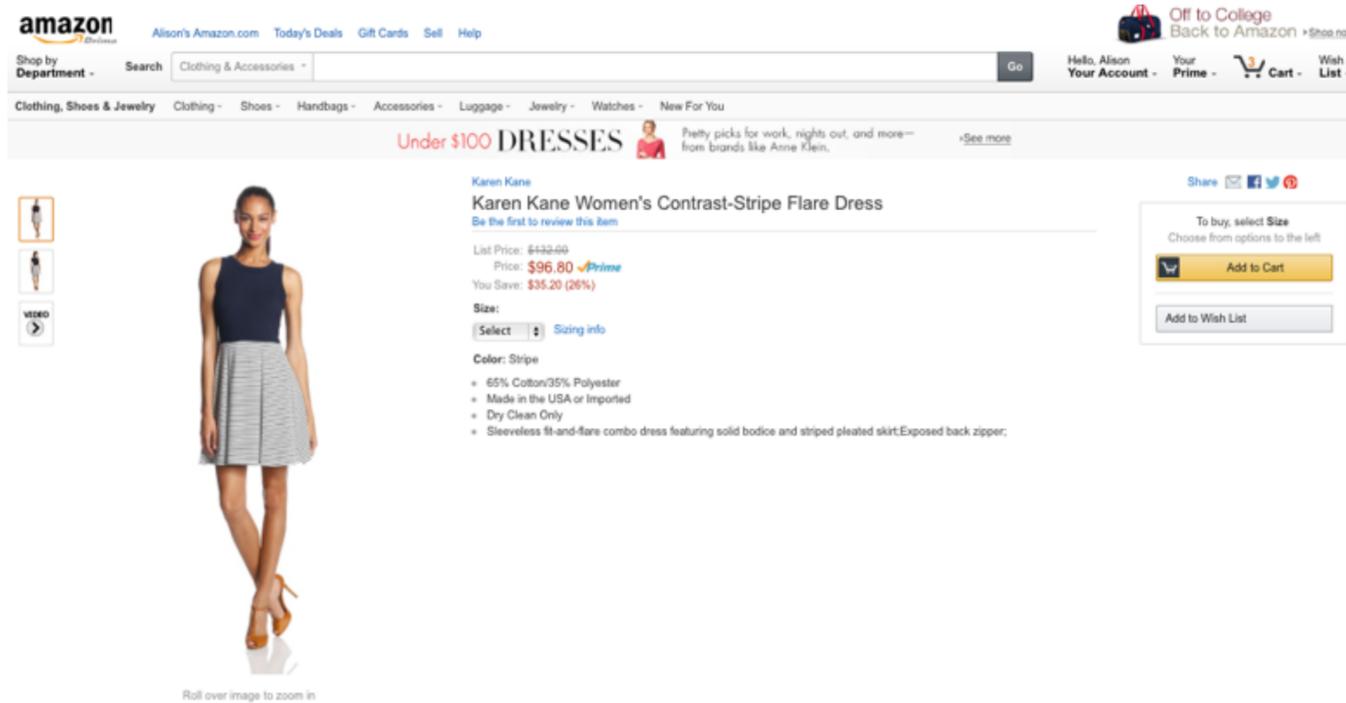
Amazon Fire TV is an over-the-top (OTT) device that brings subscription services, low-cost movie rentals, and gaming directly to the television. It arrives with the user's account already uploaded to so customers can start buying and consuming content immediately.

The Amazon Fire Phone isn't just an app; it includes Firefly technology, dynamic perspective and mayday assistance. Furthermore, when the user takes a picture via Amazon Flow, Amazon will bring up the product page for the item on their site.

Finally, Prime Air is a futuristic delivery system that envisions using drones to deliver packages within 30 minutes of ordering.



Moving ever closer to truly instant gratification



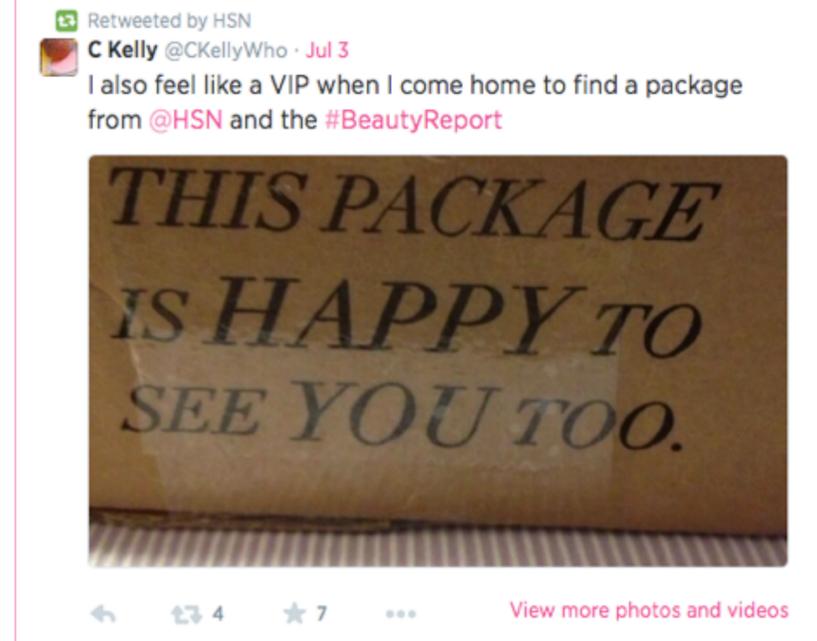
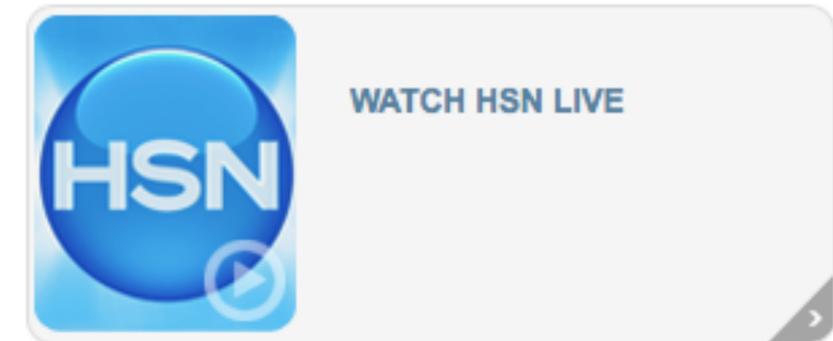
Choose your Prime delivery option:

- FREE Standard Shipping (3-5 business days)
- FREE Two-Day Shipping --get it Tuesday, July 22
- \$3.99 One-Day Shipping --get it Monday, July 21
- \$8.99 Saturday Delivery --get it tomorrow, July 19

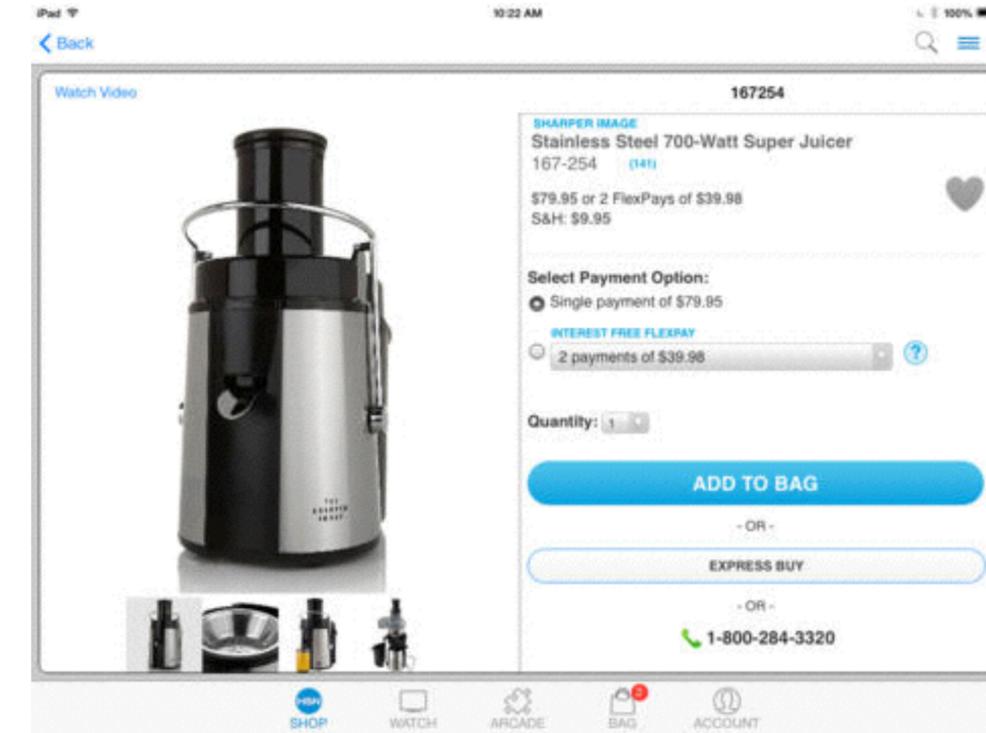
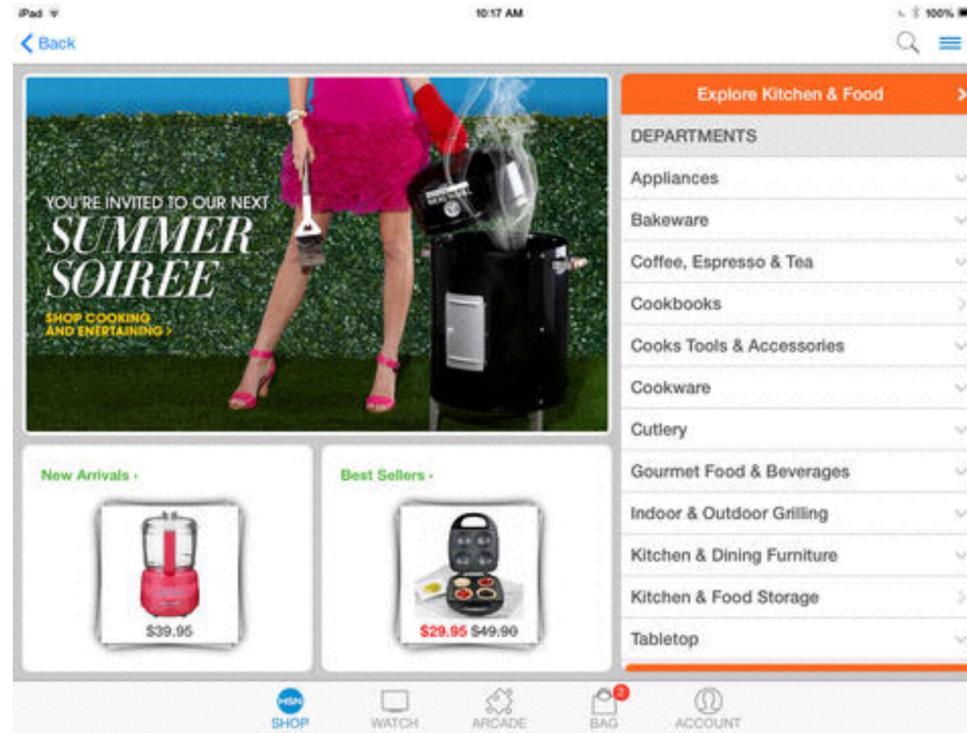
HSN drives back to live content

Home Shopping Network (HSN) illustrates how traditional media can remain relevant by creating content that lives across platforms: their shopping content is available via desktop and mobile, where viewers can stream content live or watch content that's recently aired. However, everything drives consumers back to the television network to make the actual purchase. By creating entertainment around the products, HSN can push content to a variety of devices, giving them greater flexibility in reaching consumers.

In addition, HSN's live feed and limited stock encourages immediate buying, which can be completed by calling or with a click of the remote. It's not difficult to imagine this capability expanding to smart TV or OTT ordering in the future.



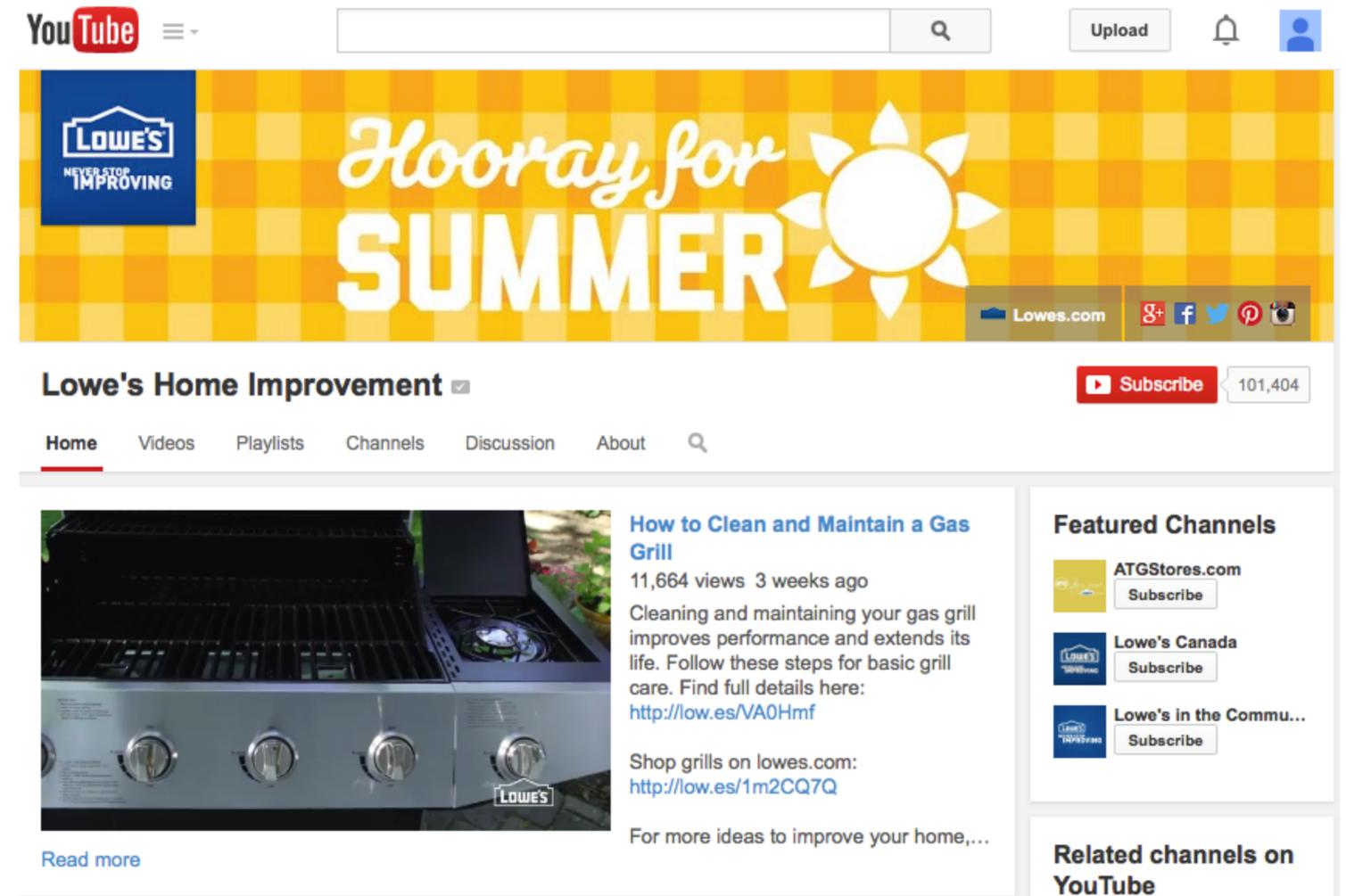
Live content lives everywhere



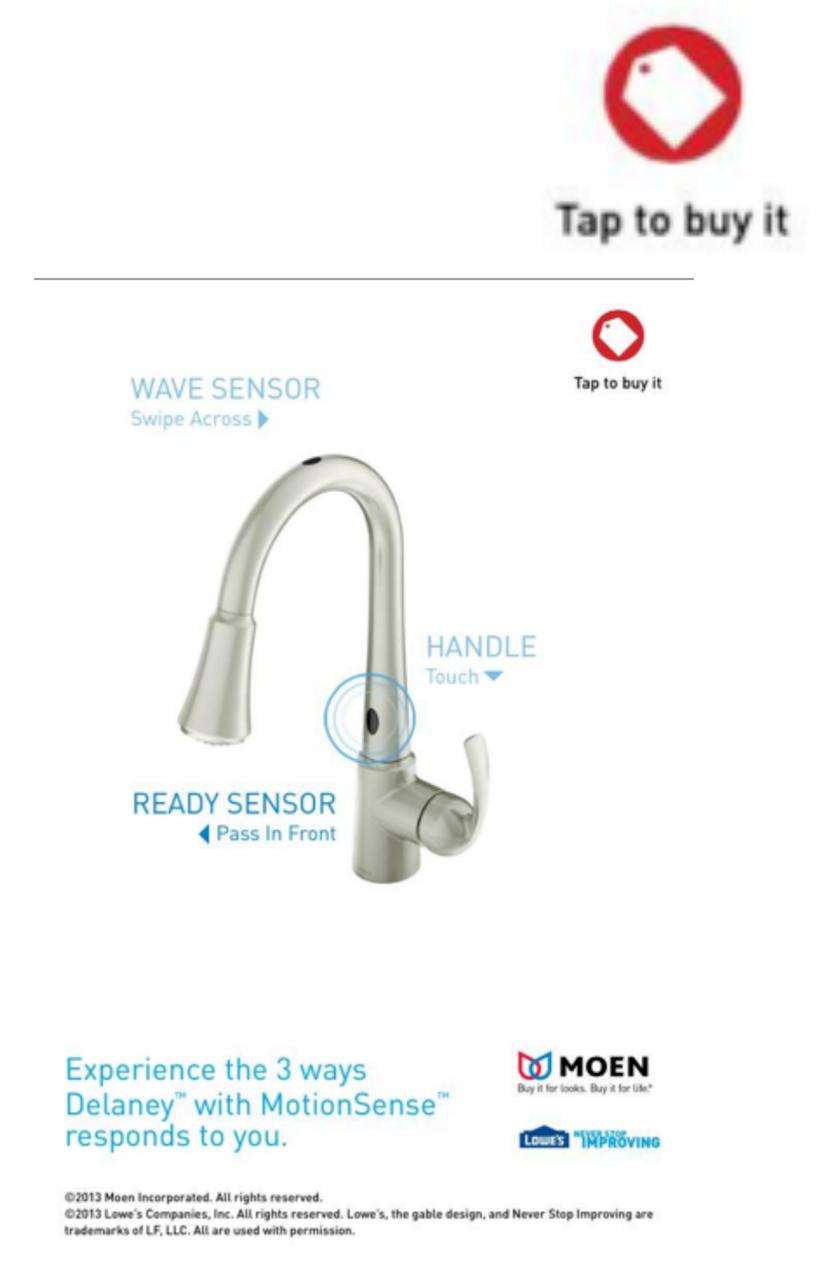
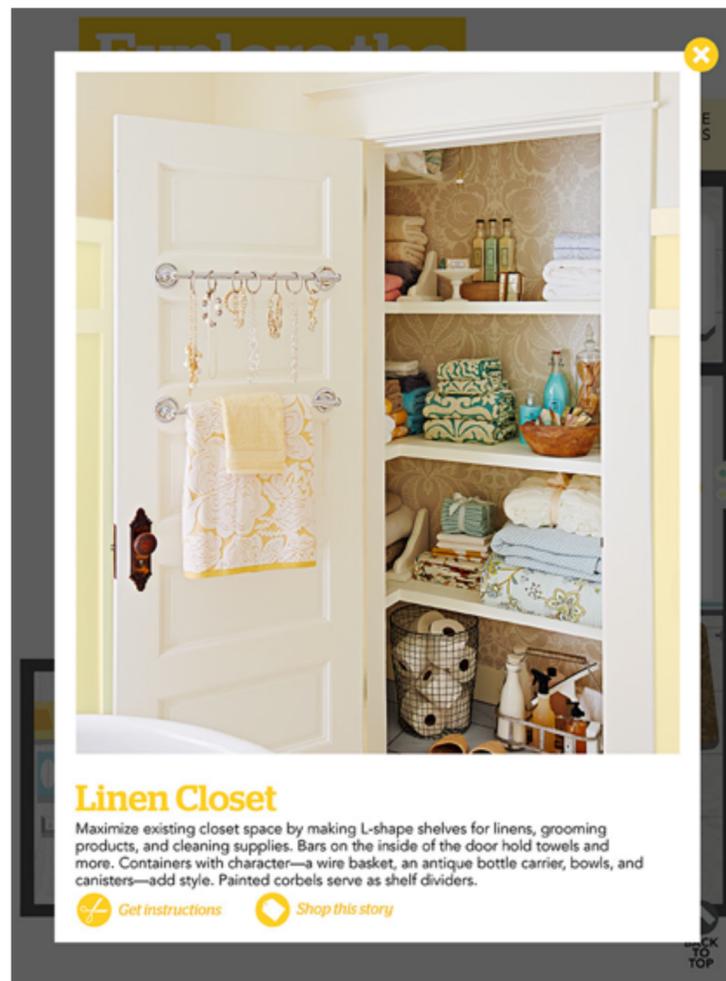
Lowe's makes DIY'ers buyers

Home improvement retailer Lowe's has differentiated itself from Home Depot partly due to their supporting content. In addition to the regular store website and shopping app, Lowe's features creative ideas on its website, as well as a dedicated [YouTube channel](#).

One of its more unique offerings is the [Lowe's Creative Ideas Magazine app](#) features videos and articles for DIY projects for your home using Lowe's products. It's organized like a magazine, but the products in all of the pictures are shoppable within the interface.



Lowe's creates shoppable editorial



What can your brand learn from these retailers?

1. Identify your brand's strength in terms of personality, purpose, or publishing
2. Maintain the customer experience across platforms
3. Incorporate elements of publishing to continue to retain and attract consumers

1. Identify your strength in terms of personality, purpose, or publishing

While ideally your brand will incorporate aspects of personality, purpose and publishing, it will naturally rely more heavily on one. Determining which is most relevant to your customer can help you focus your efforts. What your brand sells may not be as relevant as how many products you have to offer—Birchbox and Warby Parker, for instance, have a limited selection within a few verticals, while Amazon and Walmart have greater variety, making it more difficult to create a specific “personality.” And while brands built on personality may be “sexier,” brands that offer greater functionality or entertainment still have plenty of opportunities to engage and hold customer attention.

For your consideration:

- What keeps customers coming back, and why are they choosing the brand over a competitor?
- Currently, is there a personalized aspect to the ecommerce experience?
- What does “personalized” mean for your brand: recommendations? Feedback? One-to-one attention?

2. Maintain your experience across platforms

Now that desktops, mobiles, tablets, and even smart TVs are commonly found in the market, brands need to develop a smart strategy for which platforms they should use, and how. As HSN demonstrates, being on a platform doesn't mean it has to be shoppable; it can direct users back to another point of sale.

Brands shouldn't lose sight of the fact that brick-and-mortar retail will remain relevant for years to come. Even companies that start online, such as Birchbox and Warby Parker, have found that some physical presence can increase brand awareness and provide valuable consumer insights. As beacons and other tracking mechanisms enter stores, expect to see greater integration between online and in-store.

For your consideration:

- What platforms are “musts,” and which are “nice to have”?
- How can you connect the purchase channels?
- What insights from online can impact the brick-and-mortar location, and vice versa?

3. Incorporate elements of publishing to continue to retain and attract consumers

As shopping moves to multiple screens, retailers that act as publishers have an edge: they can push their content to any screen with minor modification. Keep in mind that “content” can cover a variety of topics and doesn’t have to focus on the product exclusively—it can also demonstrate how it fits into the consumer’s lifestyle, give them something to aspire to, or empower them to take action. Lowe’s efforts to inspire the DIY market are an excellent example of how to contribute to a cultural trend while still promoting their brand.

It’s also important to consider the format of the content itself, as different formats may work better for different devices. Mobile phones are great for watching six second videos on home improvement, but a tablet may be better for leisurely browsing ideas for redecorating a room. If publishing is the right decision for your brand, it’s essential to analyze the role of each device and what results can be expected.

For your consideration:

- What existing content do you have that could be repurposed?
- What is the lifespan of your content?
- What format is your content best displayed in—videos? Pictures?

Thanks!

We hope you've found this POV interesting and provocative. If you have questions or want to talk more about the future of media, please contact us:

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