OMNI-CHANNEL CUSTOMER EXPERIENCE

An investigation into the level of omni-channel approach on the UK highstreet and insight into how and why brands should adopt an omni-channel strategy
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Executive summary

The significant growth in and access to technology such as smartphones has changed the way people behave and interact fuelling the ‘I want it now’ generation. If understood and harnessed the new habits of consumers potentially offer great opportunities for brands and businesses. However, it also poses a threat to organisations - competition is continuously increasing, brands try to adopt new technologies as soon as they arrive, individuals are more demanding in terms of the level of service and the level of noise that consumers are bombarded with daily makes communications and engagement increasingly difficult. This means brands need to do work harder and innovate to be successful.

Over the last few years, a number of approaches have arisen in an effort to keep abreast of all of the new technologies available to brands. Multi-channel and cross-channel strategies try to make sure that companies have a strategy for each type of technology or platform and go some way to linking them together. There is however a number of issues with these two approaches, including that they:

- Add silo’s to organisations that prevent a consistent brand experience that people are demanding
- Don’t consider that for consumers, the communications channels and technologies are transient and blurred
- Concentrate on the technology and not the user or customer

This report investigates the concept of omni-channel with ultimate goal of understanding if it’s another reactive strategy or a useful concept for brands to adopt to improve their customer experience, sales, loyalty and business success.

The findings in this report are combined Webcredible’s from a multitude of sources. Our experience from working with our clients, knowledge sourced from investigations with leading marketing and channel managers in facilitated forums, and expert reviews by Webcredible’s user experience consultants into the retail sector to benchmark the level of omni-channel initiatives to identify trends, best practices and pitfalls.

In its most simple sense, omni-channel can be defined as ‘doing multi-channel properly’. It is delivering a seamless experience to your customers, giving them a consistent brand, level of service and ability to choose any technology or communications channel they wish, at anytime, anywhere.

Omni-channel starts with understanding the needs and behaviours of your customers, then designing experiences that fit your brand into their natural habits and day to day lives. Finally, the right technologies are chosen and optimised to deliver the experiences in an efficient, enjoyable and consistent manner to the consumer.
Having an omni-channel strategy ensures that:

- The natural demands of the consumers are central
- Investment into technology isn’t just for technologies sake
- Brands have greater scope for innovation that drives business success
- The brand is more competitive in the long term, with improved sales and loyalty

This report delivers a set of findings, trends and strategic considerations that are key to implementing an omni-channel strategy:

1. Omni-channel is an important approach for businesses to strive for

2. Generally omni-channel is not being done well at the moment but omni-channel inspired initiatives and quick wins are currently being adopted and are a great way to start. Get there first and it could be a good competitive advantage for your brand

3. In the retail sector Burberry is closest to delivering an omni-channel experience. The focus is bringing an online experience in-store, and an in-store experience online, pulling the best attributes from both to fit with customers’ habits and desires.

4. The barriers to implementing omni-channel are significant but it's worth the effort – it will make your business more efficient internally as well as setting up for long term success.

5. Most companies will need to think differently and be organised differently internally.

6. The basis of a successful omni-channel strategy is a deep understanding of your target markets emotional and rational desires and habits.

7. Measure everything to see the RoI. Studies have shown that consumers engaged through many platforms are more lucrative, so the business case for heavy investment into omni-channel will become easier to write as you see the benefit of the omni-channel approach.
Introduction

Why investigate omni-channel?

It is evident that adapting to the changes in customer requirements can make the difference between being a highly successful and profitable market leader (see John Lewis and it’s Partnership brands that continue to strengthen) and ceasing to exist (see the closure of Virgin Megastores and Game as an example of how shifts to online purchasing continues to change the face of the retail market).

The sales and engagement opportunities for brands that exist through digital channels continues to increase massively. Since the boom in sales of smart phones and now the rapid growth of the tablet market, customers are being offered increasingly novel ways to engage and buy from their favourite brands.

The growth in mobile device engagement and sales is heavily documented:

- The government Department for Business, Innovation and Skills reported a 500% increase in m-commerce (or online sales through mobile, smart phone or tablet devices) since 2009
- IMRG m-Retail sales index showed a 320% growth in mobile (including tablet) sales from January to August this year alone REF 2

In terms of the importance of getting a digital strategy correct, the continuing advances in the sales of the technology has seen, according to Ofcom3 (Independent regulator and competition authority for the UK communications industries):

- Two fifths of UK adults now owning a smart phone
- Tablet ownership has jumped from 2% to 11% in 12 months (up to July this year)

Given this increase in adoption of digital device usage we see consumer’s habits changing at a rapid pace. Whilst last year our retail report4 recognised that merely having the ability for customers to complete purchases on different platforms needed refining, the market is now saturated with retailers offering a complex web of features and functionality to customers, giving them the choice to make a purchase on whichever channel they can access. The vast choice between these competitors now means that it is crucial to have a customer experience design in place that simplifies, enhances and maximises the pull for consumers to buy into your brand, and subsequently continue to make product purchases.

This is why the concept of an omni-channel strategy has been introduced, pulling together multi and cross channel concepts toward a more coherent and successful way of staying in line with developing consumer behaviours.
There has been a multitude of ‘digital channel’ strategies to try and keep up with these changing needs (by channel we mean the generic digital platform or device a product or service can be viewed on or accessed via, e.g. smartphone, mobile, laptop etc.). There is ‘cross-channel’, ‘multi-channel’ and now ‘omni-channel’ and this report investigates if omni-channel is simply the latest buzzword or a useful concept for brands to adopt to improve their sales and brand loyalty.

About this report & who is it for?

To investigate the concept of omni-channel strategy, if it’s important, how well it is already developed and what brands can do to adopt in their organisations, we used two types of research:

- We performed an expert review of the retail sector to measure and benchmark the level of omni-channel that already exists. We evaluated the digital customer experience of 10 well known UK high street retail brands from an omni-channel perspective including their websites, mobile sites and apps, tablet presences, social media & communications and in-store experiences. (For the full research results and scoring turn to Appendix 1: Research methodology and analysis)

- We then held roundtables with marketing and channel directors from some of the UK’s leading brands, shared our results and discussed the implications for a wide range of business types. From the knowledge gained through peer to peer discussions, we identified the key driving forces, barriers and steps to implementing an omni-channel strategy.

The aim of our research was to investigate how an omni-channel strategy can support changes and trends in the market place, including:

- New technologies, increasing uptake of current technologies & technologies being used in a new and innovative ways
- Increasing online competition and customer experience not just as a face to face activity
- More demand for a joined up brand experience and the ‘I want it now’ generation of consumers
- Brands with seamless experiences inclusive of all channels leading the way, unresponsive brands failing
- Increasing sales figures on an individual channel by channel basis alone isn’t always the best way to match customer needs and lead to an overall increase in sales

This report is useful for anyone looking to grow their business, improve customer loyalty through smarter marketing strategy and anyone involved with managing a brand and products or services in an integrated way across a variety of digital channels. This might include marketing managers, brand directors, user experience managers or interaction designers.
Although our analysis was focused on retail organisations, the guidelines and findings are highly transferable, and are more than useful to other industries.

The report assumes no prior user experience or technical knowledge.
1. What is omni-channel and why is it important?

Definition

Omni-channel is the next step for businesses and is essentially about doing multi-channel properly. Omni-channel can be defined as the overarching strategy that puts the customer first ensuring a seamless and consistent brand experience, no matter what technology or communication type they are engaging with.

What’s driving the push towards omni-channel?

Until recently, cross- and multi-channel strategies were the way brands were tackling the increasing communications channels and technologies that were available to customers. However, these simply advocate having an up to date presence on each of the different digital channels and communicating the presence of other available channels to make consumers aware they exist. These strategies lack an overarching vision into how customers:

- Shift sequentially between or simultaneously access channels to perform different tasks (e.g. find a product they like the look of on mobile, save it, then view in detail and purchase online)
- Expect a brand experience that is consistent across all platforms and communications channels, and the choice to use whatever platform they wish.
- Want to be offered benefits for using their devices in different contextual settings (e.g. an in-store discount for displaying a mobile app at the checkout) and don’t want to be stuck with single platform benefits.

So how does an omni-channel approach differ, and what does it suggest in order to meet the demands of customers hungry for enriched digital experiences? We take the ‘omni’ term to mean a strategy that requires thinking about all communications channels as a whole, it’s no longer good enough to say we need to think about ‘mobile and tablet’. It is a holistic approach that is about deploying a seamless and consistent customer experience that understands:

- The complex, real life, and day to day behaviours of the way people go about their lives and make decisions
- The natural interactions of consumers across numerous channels (online and offline) with a single brand
- The role of all communications channels and engagement, including online and offline
To date the emphasis has been on the technology and the platform, for instance a mobile strategy or a social media strategy. Omni-channel is driven by the needs of the customer and as such an omni-channel strategy looks at the customers’ behaviours and needs first and supports the choice of the right technologies to satisfy these requirements. The ultimate goal is to deliver a seamless experience with a brand, on whatever platform customers choose to use, at any time and for any purpose they wish.
2. A closer look: omni-channel & the retail sector

To understand the level of omni-channel that already exists, we researched a specific market to see if omni-channel had been adopted. We researched 10 high-street retailers from luxury to high-street, beauty to department store to get a cross section to analyse the extent of omni-channel implementation and if there are any significant trends.

The omni-channel criteria

Initial research showed that omni-channel in its true ‘seamless experience, no matter what the technology’ form wasn’t yet visible in the market but there were a number of initiatives across different platforms and communication channels that are showing a move towards omni-channel. We developed 10 guidelines (all of which had a number of weighted key checkpoints giving a score out of 100) to measure the level of omni-channel initiatives that already exist:

<table>
<thead>
<tr>
<th>Guidelines:</th>
<th>Channel:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Website design meets e-commerce usability best practice</td>
<td>Online</td>
</tr>
<tr>
<td>2. Website benefits from appealing layout and visual design</td>
<td>Online</td>
</tr>
<tr>
<td>3. Mobile app/site is usable and offers useful functionality</td>
<td>Mobile</td>
</tr>
<tr>
<td>4. Mobile experience &amp; visual design tailored appropriately for the device</td>
<td>Mobile</td>
</tr>
<tr>
<td>5. Site/app offers functionality and interactions optimised for tablet</td>
<td>Tablet</td>
</tr>
<tr>
<td>6. Tablet experience/s is fun and appealing</td>
<td>Tablet</td>
</tr>
<tr>
<td>7. In-store, physical, and smart TV complement the customer experience (inc. kiosks, tablets, smart TV apps)</td>
<td>In-store digital</td>
</tr>
<tr>
<td>8. Appropriate adoption of social media usage/email newsletter (E.g. Twitter, Facebook, Foursquare, Pinterest, Tumblr) strategy</td>
<td>Social</td>
</tr>
</tbody>
</table>
9. Digital functionality as a whole meets customer needs

10. Delivery across digital channel engages, complements, and enhances customer experience in a seamless and integrative way

We evaluated a total of 10 brands that represented a cross-section of sectors within the high-street retailing market.

The retail leader board

In summary the 10 retailers received the following scores in total (out of 100) in our assessment of how well they rated against the omni-channel checkpoints we identified (more information can be found in the Appendix 1: Research methodology and analysis section on page 37):

<table>
<thead>
<tr>
<th>Rank</th>
<th>Retailer</th>
<th>Omni-channel score (/100)</th>
<th>Omni-channel rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Burberry</td>
<td>75.4</td>
<td>Excellent</td>
</tr>
<tr>
<td>2</td>
<td>Waterstones</td>
<td>65.0</td>
<td>Good</td>
</tr>
<tr>
<td>3</td>
<td>Debenhams</td>
<td>62.5</td>
<td>Good</td>
</tr>
<tr>
<td>4</td>
<td>Topshop</td>
<td>60.9</td>
<td>Average</td>
</tr>
<tr>
<td>5</td>
<td>Harrods</td>
<td>57.5</td>
<td>Average</td>
</tr>
<tr>
<td>6</td>
<td>John Lewis</td>
<td>56.1</td>
<td>Average</td>
</tr>
<tr>
<td>7</td>
<td>Marks &amp; Spencer</td>
<td>55.7</td>
<td>Average</td>
</tr>
<tr>
<td>8</td>
<td>Boots</td>
<td>44.2</td>
<td>Average</td>
</tr>
<tr>
<td>9</td>
<td>Next</td>
<td>42.0</td>
<td>Average</td>
</tr>
<tr>
<td>10</td>
<td>Ted Baker</td>
<td>41.2</td>
<td>Poor</td>
</tr>
</tbody>
</table>

**Mean score:** 53.8 **Average**
Scoring highest in this year’s report, and the only brand achieving an ‘excellent’ score overall was Burberry, who have an obvious and dedicated investment into customer experience and in particular in digital technologies.

Most brands we investigated fall into the ‘Average’ category. This reflects the push toward multi and cross channel digital presences developed in recent years where:

- Traditional purchasing online via websites now delivers a consistently good experience
- The majority of retailers have an m-commerce presence on mobile or tablet
- Seamless interaction and ability to have an engaging and personalised experience between channels is often still an issue

Most retailers delivered at least one aspect of an omni-channel design, but on the whole there is still vast room for improvement before brands will reap the benefits of this approach.
3. Implementing an omni-channel strategy

Barriers

Considering the benefits of an omni-channel strategy, why aren’t more brands adopting it? From our research, we discovered there were a number of barriers to implementing an omni-channel strategy that might hold businesses back and will need to be addressed:

- **Organisational structure**

  As with many companywide initiatives, organisational structure was the most common concern when planning on how to implement an omni-channel strategy. However, it was more of an issue for larger, more mature organisations that find change challenging, more agile organisations would be able to use this to their advantage and compete quicker in an omni-channel manner.

  There were also problems around identifying who owns the omni-channel strategy. Allocating budget, responsibility for targets, management of implementation and system ownership were areas of concern that would need to be addressed early on in the process.

- **Company culture**

  Although omni-channel was seen as the right approach, it’s also viewed as a difficult job. Due to its strategic nature and overarching initiatives, it’s likely that the day-to-day running of a business and ‘how we have always done things’ would be difficult to change.

  To introduce an omni-channel strategy the culture of an organisation will need to be organised to allow for cross-team initiatives.

- **Management & business cases**

  Another area of concern is the problem with management teams and building business cases. Omni-channel initiatives will require investment, and the funding process internally in many organisations will require solid proof of Return on Investment. For a new initiative such as omni-channel where there is little hard data or understanding there is concern that the business case will be hard to build.

- **Internal processes**

  There are a number of tools and processes that will need to be set up or changed to facilitate the omni-channel approach to customer experience. These will need to be identified and a plan put into place to make sure an omni-channel strategy works. Often, internal processes are very difficult to adapt and are time consuming to follow. One of the key success factors of an omni-channel strategy is having a single view of the customer, so the CRM tools will need to be brought together to show all online and offline data. Similarly, to deliver a seamless omni-channel experience, management tools such as
stock management may need to be adapted to support staff and online tools to have accurate information.

Another worry is that trends are moving so quickly the internal processes may not allow for new technologies to be adopted fast enough.

**Approach**

With the above barriers in mind, there are a number of steps that we’ve identified that can help setting up and implementing an omni-channel approach.

1. **Boardroom buy-in**

Boardroom buy-in was identified as one of the key areas to conquer to get an omni-channel strategy off the ground. Here are some ideas to help with this:

   - A great way to get buy in is to get them to be a user, get your CEO on the shop floor acting as a customer and see what they wish they could do.
   
   - Identify the directors that are most supportive of an omni-channel strategy and get them to sponsor the initiative. Director sponsorship is a great way to get omni-channel in the business plan & at the front of their minds when making future decisions for the organisation.
   
   - Educate internally about user experience, branding, customer experience, the pitfalls of multi-channel and then educate on the topic of omni-channel. Ensure you include all management and key stakeholders, and get them to work on the omni-channel vision collectively.
   
   - One way that was identified to encourage buy-in from the board is to outsource research to external organisations. This will add ‘clout’ to your business case and eliminate resourcing issues balancing the long term omni-channel work and the short term business deliverables.
   
   - Gather evidence to help identify and plan the Roi. Bringing together case studies from competitors or leading industries and industry reports is a good place to start. Also, try to deliver some small aspects of an omni-channel campaign to show the value to the business on a small scale. It’s also worth delivering a mix of qualitative and quantitative research to prove the customer demand.

2. **Company culture, processes & team buy-in**

There are a number of cultural changes that may need to be introduced to the company culture, for instance the mentality of working for a whole company and brand, not just one department.

There are a few ways to do this:
• Many businesses start to tackle this by introducing trans-organisation ‘omni-channel’ champions and directors to help break down silos. Develop cross-functional “innovation” teams to take ownership of the approach.

• Restructuring to a flatter organisation based on the customer and not technology is another approach that we have seen some organisations undertake to become more efficient and successful. This should help reduce internal politics and ensures more collaboration through shared functions.

• You will need a good CRM system as the glue to deliver the ultimate customer experience, customer data management is key to success.

• Ensure all staff are knowledgeable enough to think omni, not single channel – start with basic UX/CX principals and move up. Then individuals need to be empowered to deliver omni-channel initiatives adapted to their local markets.

• Remove internal apprehension about sharing expertise / knowledge through staff training. Introducing omni-channel performance measures in job descriptions can help incentivise departments and individuals and gives objectives to engage in omni-channel initiatives

3. Understand your customers and audiences, investigate their underlying needs

An omni-channel approach is based on delivering to your customers’ needs and behaviours, so a successful omni-channel strategy needs to be based on a good understanding of your customers.

Ensure you look at the full journey for inspiration of your end-to-end omni-channel experience. This includes inspiration, shopping lists, purchase, delivery, after sales, advice and loyalty. Also, remember the subconscious - even when the consumer isn't actively looking or using your services you need to think about the experience your brand could deliver.

To find what would work best for your customers then you need to do research, and continue to do research.

Testing what you have now only tells you about what you have now so instead you need to do research - observe and listen. Qualitative is important to give the story behind the stats but needs to be significant to get a good view. You can do this through:

• Customer surveys and polls

• Analysing or utilising customer service routes including call centres, social and account teams, and centralise this feedback and commentary for continued analysis

• Making the most of market research samples and reports
• Performing diary studies and cultural probes to understand even what your customers wouldn’t be able to communicate.

4. Measure success

What outcomes show your omni-channel efforts are working? Depending on the focus of your business goals, the omni-channel strategy should improve loyalty, engagement, brand awareness and deliver increased revenue, an increased life time value of the customer and internal efficiencies.

It is important that a robust measurement process is put into place to see the returns and improve your omni-channel strategy over time. Quantitative measurement methods could include tracking directly with analytics across all platforms (carefully, in line with privacy laws), attribution based measurement, specifically made loyalty schemes to bring in data across channels or centralised login functionalities.

There are also qualitative methods of measuring the success of your omni-channel strategy, including benchmarking against competitors, measuring brand affinity by investigating engagement and sentiment, upgrading mystery shoppers to mystery brand experiencers or using user experience testing methods shaped around brand experience.

5. Get started

Finally, the best approach we discovered was the ‘you have to be in it to win it’ approach. The longer brands wait to start on an omni-channel journey the further behind they will be in terms of customer experience.

Start by finding strands of ‘omni’ to get started by pairing channels and building on cross-channel initiatives. These pilot campaigns should be measured using a few methods to show the RoI and help with funding and buy-in.

There are also a number of things that brands should ensure they do before they start, we analysed the retail sector and highlight some key recommendations in the next section of this report.
4. Quick wins on key platforms

From our research, it is apparent that omni-channel is an important strategy and a goal that organisations need to get themselves operating toward to deliver the best experience to their customers and in return be more successful as businesses. However, as we have seen omni-channel is not without its difficulties.

Based on our research into the retail industry, here are some examples of excellence that show omni-channel initiatives that can get brands going. Following this, there are some key recommendations that were found during the research, including examples of best and worst practice in a multitude of areas, including: online, mobile, tablets, in-store, social media & communications implementation.

Omni-channel initiatives

Our quick win recommendations for your omni-channel initiatives are:

1. **A consistent look and feel that reflects and enhances your brand**, particularly as mobile technology becomes more widespread customers will expect to be welcomed to whichever channel they access with a visual design that is in line and at a quality of the more established physical and in-store channels.

2. ** Seamlessness personalisation**, when shifting between channels customers who've performed activities such as placing items into a basket or adding them to a wish list will benefit from subsequently viewing results of these actions. This will be a technological challenge and may well require them to login for this information to be retrieved.

3. **Uniform and memorable experiences replicated on all channels.** When moving from between physical and digital stores a customer’s ability to navigate ‘departments’ and locate the products will be made easier by using common conceptual definitions and content or item structures (at a simple level this may mean constructs such as ‘homeware’ or ‘outdoor items’).

4. **Functionality which meets customers’ specific needs from your business and appropriate for the channel.** Make sure the activities you expect customers to perform on each channel match their requirements, and that across all channels their requirements are met. Where one channel offers its own unique benefits clearly demonstrate this to customers and make them aware of how this enhances their experience and allow them to fulfil all their shopping desires. A good example of how this is relevant in an ‘omni’ sense would be the notification of discounts or sales promotions; whereby discounts should be advertised on whichever channel the customer is using.
Some examples of campaigns or initiatives that deliver an omni-channel approach include:

- **A seamless experience**

  Burberry delivers a seamless omni-channel experience, which comes as close to a ‘perfect’ omni-channel strategy we could find because:
  
  - It incorporates use of the very latest technology
  - The brand look and feel is almost flawlessly consistent across the channels
  - Each channel’s technical limitations have been overcome by offering seamless access to alternative solutions
  - The experience across channels is personalised with your ‘My Burberry’ preferences following you wherever you go

- **Giving customers the choice**

  Browsing the customer service section of the Debenhams website gives a full range of information for a customer wishing to visit the store. The availability of ‘Free Wi-Fi’ also supports an omni-channel strategy of supporting mobile and tablet users in-store.
Online

Our quick win recommendations for websites and moving towards a more omni-channel approach:

1. **Get the basic usability right** – don’t try to confuse potential customers with cluttered pages, poorly designed checkout experiences or overly complicated product searches.

2. Where appropriate **take advantage of the latest developments in User Experience design** to offer customers content that has both increased functionality. For example the *John Lewis* jean guide and sleeker visual design of *Next’s* catalogue. Both deliver a heightened experience that better matches those of other touch-points, such as in-store.

3. Most importantly **design the functionality and look and feel of your website to complement and be consistent** to other channels, and customer touch-points.

Out of those we reviewed there were some examples that simply went beyond even our expectations. They included some novel (and useful) functionality or innovative designs that really enhance a seamless purchase journey, and importantly were consistent with the brand proposition and delivered excellent experience:

- **Bespoke features**

  Similar to the ‘create your own character’ feature in video games, Burberry’s **fully interactive web tool** allowing consumers to refine to the exact detail (including the type of buttons and cuffs) their own uniquely styled Burberry trench coat. Using this function is simple, enjoyable and links directly to other channels with the ability to share your designs via your social networks or arrange an in-store visit to collect and refine your garment.
### Product search

![Product search screenshot](image1.png)

Whilst the Waterstones home page is generally quite cluttered, the prominently placed product search not only matches books by title, but also thematically. In the example below the book ‘Thinking, Fast and Slow’ by Daniel Kahneman was searched for, not only was this book displayed as the top result but books that were thematically similar were also displayed.

### Product browsing

![Product browsing screenshot](image2.png)

Rather than simply allowing customers to select items to view in a very controlled criteria based manner (as is still the standard across the retail sector), **Next permits potential customers to view ‘collections’** – pleasing visual displays with hover over areas which allow the ability to see high level details on individual items or click through to investigate them further. These collections can be sorted by brand, or by style (e.g. sportswear or casual). The choice is down to the customer, and the classic select product via attributes (e.g. garment type or colour) is also retained for those wishing to shop online in a more traditional manner.
**Guidance online**

*Choosing Your Jeans* – the John Lewis guidance tool acts like an in-store personal shopper explaining the unique features and look define your jeans. It also gives tips on how to look after clothing and generally look better wearing them. It is an excellent example of how the extra functionality provided by designing for the web, can replicate and complement offline experiences.

**Identification of other channels**

*Website* included an identification of the existence of mobile, tablet or social channels. It seems the new de facto standard is to list a brand’s entire social presence in the footer of each webpage. Obviously this is not the case for those without mobile/tablet presence or pages on social networks, but appears to have become the norm (as in this example from Marks and Spencer below). This demonstrates the high level of cross-channel strategy in the industry but needs to be taken further with other activities to meet the requirements of an omni-channel approach.

It’s worth noting that sometimes having no presence or simplistic functionality matches customers’ requirements better than extraneous or confusing content and features. However, here are some online examples of elements that were found to cause particular problems in completing our purchases and were detrimental to the wider customer experience:
Checkout processes

Mobile

Our recommendations for your mobile presence to help you move towards a more omni-channel approach:

1. **Make items added to wish lists, baskets, and checkouts on mobile devices available across all channels.** The ability to select or save products that have been viewed on mobile is likely to be one of the most common actions consumers perform when making product searches on mobiles.

   Equally it might be worth re-considering the relationship between wish lists, gift lists, baskets, bags and checkouts to provide consumers with a much simpler way to save items they are interested in viewing again or purchasing at a later date.

2. **Ensure customers log-in to an app early on to receive a personalised experience.**
   
   In the course of our investigation the only way to 'save' product selections for viewing at a later date was through logging in with an account first. Ideally as soon as the app or site is opened customers should be asked to log in, this way instantly saving them a record of what they’ve done or retrieving their previous activities they’ve performed (whichever the channel).

3. **Send your customers to a mobile site if you don’t have an app, and vice versa but don’t make them access both.**

4. **Consider whether an app is really necessary or whether a mobile site would be more appropriate.** If the app has benefits which a customer can recognise from the
start, or it is explained to them exactly why an app may be enticing they’ll be more likely to start and continue using it.

5. **Develop ways to distinguish your mobile presence, yet maintain an integrated customer experience.** As seen in the examples of excellence, making sure your mobile presence takes advantage of the platforms unique features is the best way to increase adoption rates and raise awareness of your brand. Simply having a mobile presence for its own sake is not a good way to succeed in a highly competitive retail market - you’ll need to make sure your mobile proposition is developed to match the reasons why people know and love your brand.

Examples which meant retailers were given good to excellent scores were those which gave shoppers some unique or tangible reason to use the app or mobile site, particularly where they facilitated use of the website or a visit in-store. Examples of retailers exhibiting features to achieve these scores are as follows:

- **Notifications**

Out of all the mobile apps downloaded for the investigation Debenhams was the only that retailer to use **push and text notifications**. Over the four week period notifications were sent out roughly once or twice a week and highlighted reductions, new products or limited time events. The design of the mobile app was often updated to reflect the offer that was currently on, delivering a consistent experience.
- **It doesn’t have to be a mobile app**

  ![Image of a mobile app](image1)

  Mobile sites: Boots who recognise that a simplistic mobile site serves customers perfectly well, and that an app couldn’t reasonably deliver anything this site already provides. Next transfer you to their desktop site whilst their Android app is under development (and advertise the fact).

- **Directions to store**

  ![Image of store finder](image2)

  Rather than displaying a list of nearby ‘pins’ the store finder used on Burberry’s mobile site gives automatic access to Google maps to give directions from your current location of how to get to nearby stores.
‘Zoom-able’ product views.

Mobile isn’t the ideal platform to get an in-depth look at the intricate lines and details that can often make a product that little bit more desirable. Even with this is in mind, particularly in the case of clothing retailers, customers must be given the opportunity to get as much information on the look and feel of a product as possible. This will at least enable them to decide whether or not they will wish to look into viewing it online or in-store. Online customer reviews discussing actual fit and materials of garments for instance is a great way to enhance this.

There were a number of areas that the brands investigated could have done much better with their mobile implementation:

- Image quality

The Burberry leaves a lot to be desired (in terms of image quality and clarity) when it comes to replicating the exclusivity of their brand. Whilst it’s obviously important to give potential customers the ability to access each product line in a manner that reflects the glossy, image heavy online experience, replicating this on mobile has technical constraints that mean it’s difficult to get the look and feel of the main site across.
- Basic optimisation

The lack of any optimisation on mobile raises a number of issues for Harrods. The new website is obviously built to take advantage of the latest web technologies, but is not optimised for mobile, and when on 3G fails to load at all (as in the image here). Even when connected to Wi-Fi the navigation does not work correctly and the existence of a mobile app is not recognised and communicated when on the mobile site.

- Banner ads and your brand

The M&S app is supported by banner advertisements at the bottom of the page. For such an iconic brand it seems out of place to be promoting ‘Top online games’ alongside the purchase of clothing goods. As can be seen in the image below, the mobile site (on the right) renders very similarly, and it seems an obvious choice to direct customers here rather than let them suffer an ad laden experience on an app.
Full purchase journey

Here are a number of tablet related recommendations:

1. Take advantage of the unique and cutting edge experiences that can be provided on tablet devices. Customers with tablets will likely belong to the 'early adopters' category of digital users, and are generally more tech savvy. For this reason presence on a tablet will most likely come under the greater scrutiny of customers within this demographic. It is therefore of utmost importance to give them an experience that takes this fact into account.

2. Design websites that incorporate touch gestures into the interface. To cater for the increased expectations of tablet users it need not be necessary to provide a full tablet app. In this case it is recommended that the design of websites are either:

   - Responsively designed so as to render in a manner that is optimised for tablet, the content automatically resizes or takes a tablet friendly layout
   - Inherently designed with touch and tablet in mind, whereby functionality (whether viewed on tablet or online) makes it easy for customers to navigate and interact with the site whether using their fingers or a mouse

Whilst the John Lewis mobile app is clean, crisp and provides a good customer experience in terms of both functionality and visual design but there is no ability to buy, or add items to your basket to continue a purchase. When the buy stage is reached a notification occurs directing the customer to the mobile site, which whilst providing increased functionality, lacks the quality of the design found in the app, and offers reduced functionality. Presumably customers are expected to move along this journey to access the additional purchase functionality, but this is not a good customer experience and will likely impact on the customer’s desire to complete a purchase.
- Tablet optimisation

Burberry’s tablet optimised website specifically instructs the customer of online features which cannot be accessed when using the browser on the iPad. Functionality such as the ‘bespoke’ garment creator cannot be viewed, and certain promotional areas of the site take the user to an alternative tumblr site to display a different version of this campaign more suitable for the platform.

- ‘At home’

M&S’s ‘at Home’ iPad app is the perfect example of a well thought out tablet presence. This app makes full use of the enhanced touch interactions and visual capabilities of the device to provide a simple and enjoyable experience allowing customers to browse its home wares in a similar fashion to how you would ‘in store’.
Apps as magazines

There were plenty of areas that could be improved upon to pull tablet into an omni-channel strategy:

**Boots, Topshop, Ted baker and John Lewis** all rely on customers to access either the iPhone app or the online website. Neither of which are optimised for tablet. In terms of shopping through the website on the tablet, the use of drop down menus, and reduced link sizes (requiring a customer to zoom on the page) make for a clunky and less enjoyable customer experience.

In-store

An important area to remember when looking at omni-channel is ‘offline’. Here are a few recommendations for your in-store or bricks & mortar presence:

1. **Make customers aware of the digital channels available** to them with sign-posting in-store. Also ensure staff are knowledgeable on and willing to demonstrate the full potential of the in-store digital presence.

2. **Improve the design of online, mobile and tablet functionality** intended to be accessed in-store to:
   
   a. Better notify customers of its existence

   b. Provide handy examples or quick guides as to how, why and what benefits can be gained by using these features

**The Harrods magazine app** appears in the ‘newsstand’ of the iPad sitting alongside other regular publications customers have downloaded. The latest issue automatically downloads, and is a digital representation of the in-store promotional catalogue. There are a wealth of articles and the design reflects a smart and intuitive attempt to make full use of a tablet presence for purely promotional means in a drive to keep customers engaged with the brand and encourage in-store visits. It also offers links to add products to a ‘wishlist’ and instructs customers where they can find items in-store.
3. **Give consistent brand personality**, customers are now routinely accessing brands digitally, reflect these experiences both physically, and in-store.

Some examples of good implementation include:

- **The online experience in-store**

  **Burberrys new flagship store** on Regent Street is currently the best example of truly omni-channel in-store approach. The design of not only the garment displays, but also the way in which customers interact with the staff is purposely aimed at replicating the at-home online shopping experience (see below).

  - **Staff whom carry iPads** to allow customers to login and access their ‘My Burberry’ account to remember which items they’ve previously viewed online and retrieve personalised recommendations based on their previous browsing behaviour.

  - **The removal of tills** and the need to queue, with plenty of ‘break out’ comfort area (such as sofas, and comfy chairs) means customers can enjoy browsing their own or staff’s digital devices to complement their purchasing habits whilst being treated to light refreshments. Again this is intended to replicate how consumers might buy online from the comfort of their own home.

- **In-store kiosks and help points**

  **Boots in-store kiosk** that links with their Advantage Card scheme means loyal customers visiting in store can quickly find out how many loyalty points they’ve earned, and what current offers they might be entitled to. Whilst not the most integrated approach (as no purchasing can take place, and there are no links to online accounts) this simple functionality meets a recognised customer demand and enhances their experience by removing the need to queue to discover this information.
- **In-store Wi-Fi.**

  A more recent development is high street stores trying to entice customers to visit their stores with in-store Wi-Fi. In the case of the retailers mentioned above the reasons for this may be twofold:

  - Waterstone’s will soon be selling Amazon Kindle devices and people entering the store will want to buy and download content to their new devices immediately, whilst receiving the in-store recommendations the Waterstone’s brand is famous for (and quite possibly buying a paper back or two).

  - Debenhams’ mobile and tablet apps both contain features that customers may wish to use in store and by providing them with Wi-Fi connectivity to do so they’ll aim to attract customers in store.

  There were brands that had a long way to go in integrating their in-store experience with digital platforms, let alone an omni-channel approach.

- **Website access in-store**

  In theory the idea of **allowing customers to scan items bar codes in-store** using their mobile or tablet seems like a novel and engaging activity. In practice there are two difficulties identified with this functionality:

  - Customers are still not comfortable trying out new functionality unless it can be demonstrated to be useful (see the poor usage rates of QR codes for example)

  - The facility to add items to wish or gift lists does not always integrate well with then going and purchasing items online (as described earlier in this report).
Social

Here are some key recommendations to think about for social and communications:

1. **Tailor social media strategies to attract your target audience.** If your customers use you to learn about the latest glitz and glamour provide them with a means to do that with regular Facebook updates to blogs and style articles. Alternatively if your customers are looking for practical guidance, possibly in the form of video, focus your social strategy on providing this sort of content.

2. **Invest in new social channels** but be prepared for the risk of initially low adoption rates, and intangible returns on investment for your brand.

3. **Smart TV technologies are still in their infancy** but offer brands the chance to give their customers an extended and novel experience.

4. **Coordinate messaging from your social platforms and email** communications to support the omni-channel approach, and maintain a consistent tone of voice.

Here are some good examples of social and other communications media crossing into omni-channel initiatives:

- **Use of video**

  Boots have understood that the most effective means of reaching their audience through the use of video is by offering practical guidance on how to use beauty products (reflected in number of views on YouTube – compared to their other content). This has also been successfully embedded into the Boots website for seamless access to this content.
Facebook

Taking full advantage of their global popularity amongst probably the most active users of Facebook, Topshop aren’t reluctant to show their popularity on the network and are willing to remind potential customers of this fact, with over two million followers they have clearly tapped into a means of ensuring their potential and existing customers are reminded of the latest trends that will advise them of this season’s essential look.

Twitter

With a loyal following (and a busy social media team) John Lewis performs well in using this particular medium to:

- Publicise in store events
- Communicate directly with customers queries about brand activities (rather than simply customer service requests)
- Provide links to online articles and other public relations materials to reinforce the strong image of their brand.
Areas of social and other communications that could be improved on:

- **Smart TV apps**

  Whilst a novel expansion into the Smart TV app market, considering M&S’ target demographic it is difficult to understand why their target audience will access this channel and therefore feel engaged with the brand. This, however, is an interesting example of how hard brands are willing to compete by developing a presence on novel digital channels.

- **Foursquare**

  Though commonly used by only the most savviest of mobile customers it is interesting to see that Debenhams have given page space (that is hidden away) to an offer that promotes users of foursquare to enter the Oxford Street store. However, even for fans of this app it is hard to understand why such a promotion exists given the minimal benefits.
Conclusion & recommendations

Fully developed omni-channel experiences (such as Burberry’s) are only currently feasible thanks to innovation and budget that can be justified in flagship stores for exclusive brands. Yet whilst a full omni-channel approach may be difficult to achieve, retailers need to recognise the increases in customer loyalty that are gained by updating current digital experiences beyond providing simple purchase mechanisms on individual channels. In true omni fashion this can easily be augmented and enhanced by social, and mobile/tablet channels in ways that give more enjoyable experiences and reflect the expectations that customers have from their favourite brands.

Therefore whilst retailers must approach the design of their digital presence in an omni-channel way, this may not require fully optimising each particular channels (e.g. in-store, mobile or tablet). It may not even mean encompassing a full ‘multi-channel’ approach – omni-channel is cleverer than that. Think of the likes of Harrods and Ted Baker who strongly emphasise digital to simply promote their brand and in-store visits – rather than full ‘multi-channel’ shopping.

Technical and budgetary limitations will always reflect what can and can’t be achieved. Whilst not being truly ‘multi’ or ‘cross’ channel might seem counter-intuitive, in the case of Boots and (at the other end of the spectrum to Burberry) ‘going omni’ means providing a level of functionality and access to features that truly reflect what their customers need and desire, even if this meets only basic requirements.

For this reason, at a higher level we recommend retailers adopt unique omni-channel strategies that best reflect the unique and individual requirements of their customers.

Finally it is important to remember that the driver behind any purchase on a particular channel will require detailed analysis of customer’s true requirements and expectations. Focussing not only on an intention to create sales through a particular channel, but increase sales by strategic design at a macro level; keeping customers engaged both on individual touch points and as they move between them. Most importantly, and what distinguishes an appropriate omni-channel strategy is one that must appropriately include channels in a complementary and seamless way to:

- **Drive new custom** – attract more customers with digital presences that make best use of the specific capabilities of each channel whilst at the same time complement and recognise the presence of other channels

- **Consistently engage customers** - enough to maintain a relationship with your brand after they’ve first encountered or used new and dynamic technology, remember that it will initially be an alien experience to them, and may well need encouragement to return

- **Retain loyal customers** – via targeted social media, e-mail newsletters, and exciting features that make them want to return to your store again and again

- **Maximise long term potential** – offering the availability of new lines and clearly demonstrating new ways for them to purchase
- Refer colleagues, friends and family – with appropriate experiences that provide the wow factor you will give them a real reason to recommend your brand first over that of your competitors

- Increase sales – deploy an omni-channel strategy that best meets the requirements of your customers so that in whatever means they choose to browse, search or buy from your brand it matches their individual expectations.

To round-up a well thought out customer experience strategy is the key to a successful digital presence in the retail sector. For brands wishing to achieve this goal, customer research establishes insights into the latest trends and likely adoption rates of a full range of digital products and services. Knowing exactly how customers wish to interact with and between different digital channels will help retailers to successfully develop award winning omni-channel presences. These will be those experiences that match customer’s true needs and desires, and can be developed through a strategic customer experience design approach that examines both:

- At a macro level the interactions and holistic experiences customers have with your brand across all digital channels

- At a micro level the individual journeys that customers take on a daily basis when buying goods

For more information about establishing customer experience strategy, call Webcredible on 020 7423 6320 or email info@webcredible.co.uk.

For advice and other general user experience guidelines visit www.webcredible.co.uk/blog or book a place on a Webcredible user experience or digital marketing courses at www.webcredible.co.uk/training.
Appendix 1: Research methodology and analysis

The report is based on an investigation into a number of elements that represent key aspects for a successful omni-channel approach using an expert review process performed in August and September 2012. The research was based on:

- Analysis of 10 UK high-street brands from different sectors from beauty to book stores, and fast moving high-street fashion to luxury brands
- 10 guidelines were used to rate tangible and emotional aspects of user experience
- Each guideline is split into a number of checkpoints that each brand is scored against (with between 0 – 2 points) to make up the final scores

The retailers analysed were specifically broad in order to give the best view of the retail market as a whole, and included:

<table>
<thead>
<tr>
<th>Retailers</th>
<th>John Lewis</th>
<th>Debenhams</th>
<th>Topshop</th>
<th>Burberry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boots</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Waterstones</td>
<td>Marks &amp; Spencer</td>
<td>Next</td>
<td>Ted Baker</td>
<td>Harrods</td>
</tr>
</tbody>
</table>

After an exhaustive series of mock purchases across the digital devices, in-store visits and detailed market investigation encompassing the best part of a month, the 10 retailers were rated against 10 guidelines (on page 10) that cover both rational user experience criteria and emotional responses to design in-line with behaviours and needs.

The guidelines were developed from the experience we have gained working with our clients over the past 12 months who have shown increasing requirements for omni-channel strategy. As our initial research showed omni-channel was not highly implemented, these guidelines were also drawn from desk research (see the references section) and building on our previous work include (as a baseline) factors that make up good multi-channel and cross-channel customer experiences that could lead to a more omni-channel approach.

Over the course of a four week period which included visits to flagship stores across the country and the purchasing of dozens of items we made over 500 ratings against our 50 checkpoints awarding between 0 to 2 points for each. When performing these ratings we:

- Documented the rationale behind the decisions
- Gave notes to provide evidence to the ratings given to each retailer
- Included the source of the original guideline

The final results were documented in an exhaustive evaluation spread sheet to enable our consultants to fully analyse the findings, the average scores for each brand against each guideline can be viewed below.
## Table of results

<table>
<thead>
<tr>
<th></th>
<th>Waterstones</th>
<th>Boots</th>
<th>John Lewis</th>
<th>Debenhams</th>
<th>Marks &amp; Spencer</th>
<th>Next</th>
<th>Topshop</th>
<th>Ted Baker</th>
<th>Burberry</th>
<th>Harrods</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online (website) (/20):</strong></td>
<td>13.0</td>
<td>11.5</td>
<td>13.5</td>
<td>14.0</td>
<td>14.0</td>
<td>14.5</td>
<td>15.0</td>
<td>11.5</td>
<td>14.5</td>
<td>15.0</td>
</tr>
<tr>
<td><strong>Mobile (/20):</strong></td>
<td>15.0</td>
<td>12.0</td>
<td>12.5</td>
<td>15.5</td>
<td>11.5</td>
<td>8.3</td>
<td>16.0</td>
<td>11.5</td>
<td>13.5</td>
<td>10.0</td>
</tr>
<tr>
<td><strong>Tablet (/20):</strong></td>
<td>11.1</td>
<td>0.0</td>
<td>6.5</td>
<td>12.5</td>
<td>15.0</td>
<td>7.8</td>
<td>7.5</td>
<td>6.0</td>
<td>15.5</td>
<td>12.5</td>
</tr>
<tr>
<td><strong>In-store (/10):</strong></td>
<td>7.5</td>
<td>6.5</td>
<td>5.0</td>
<td>5.0</td>
<td>0.0</td>
<td>0.0</td>
<td>4.5</td>
<td>1.0</td>
<td>9.5</td>
<td>5.0</td>
</tr>
<tr>
<td><strong>Social (/10):</strong></td>
<td>5.4</td>
<td>4.2</td>
<td>5.8</td>
<td>6.0</td>
<td>4.2</td>
<td>7.5</td>
<td>5.0</td>
<td>4.2</td>
<td>5.4</td>
<td>5.0</td>
</tr>
<tr>
<td><strong>Omni-channel (/20):</strong></td>
<td>13.0</td>
<td>10.0</td>
<td>12.8</td>
<td>9.5</td>
<td>11.0</td>
<td>3.9</td>
<td>12.9</td>
<td>7.0</td>
<td>15.0</td>
<td>15.0</td>
</tr>
</tbody>
</table>
The overall scores were recorded numerically (see full numerical results see above) and converted to ratings to show how well each retailer adheres to the guidelines:

- **Non-existent** – there was no evidence of a presence on the channel investigated
- **Poor (0-25%)** – there were presences but their designs were poorly thought out and offered no real benefits to the customer
- **Average (25-50%)** – offerings were generally what might be expected given our findings from last year, and were on a par with that of those outside of the retail industry
- **Good (50-75%)** – The channel strategy stood out and provides useful or enjoyable functionality for customers
- **Excellent (75-100%)** – Awarded in cases where there were consistent examples of market leading innovation

**Breakdown of results by platform:**

**Online**

**Average score 12.5 out of 20**

Since last year’s cross-channel report many of the usability issues we identified have been fixed and overall it appears that in terms of web usability the market gaining maturity. However, it also means that competition amongst online retailers is now greater than ever and there is still plenty of room for improvement of the overall customer experience (beyond fixing general usability issues).

On average each retailer has an online sales proposition that is good at meeting customer’s online requirements but flaws in designs and poor choices in functionality (even with their best intentions in mind) ruin the omni-channel shopper experience.

**Overall online scores**

<table>
<thead>
<tr>
<th>1. Website design meets e-commerce usability best practice</th>
<th>Overall finding (Good)</th>
<th>2. Website benefits from appealing layout and visual design</th>
<th>Overall finding (Good)</th>
</tr>
</thead>
</table>

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<table>
<thead>
<tr>
<th>Easy to use product search/browse</th>
<th>Good</th>
<th>Good first impressions</th>
<th>Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identification of other channels e.g. mobile, social, in-store</td>
<td>Good</td>
<td>Visual design is appealing</td>
<td>Good</td>
</tr>
<tr>
<td>Well-designed check-out</td>
<td>Good</td>
<td>Site is intuitive</td>
<td>Good</td>
</tr>
<tr>
<td>Navigation is simple and easy to follow</td>
<td>Good</td>
<td>Products are well displayed</td>
<td>Good</td>
</tr>
<tr>
<td>Good use of product reviews/product info/availability</td>
<td>Good</td>
<td>Experience matches brand expectations</td>
<td>Good</td>
</tr>
</tbody>
</table>

**Mobile:**

**Average score: 11 out of 20**

There is a split in the numbers of those brands with dedicated mobile apps and those with mobile optimised/responsive sites. Generally on this channel we see a mix of those:

- who are focussed on simply providing a mobile purchasing platform
- offering **functionality to seamlessly shop, and interact across a range of channels** (as well as buy).
Functionality such as ‘wishlists’ or ‘gift lists’ are common, where these allow customers to save a record of items they might want to purchase in future (but without placing them in a ‘basket’). Surprisingly transferring product selections to the online shop (either through the wishlist or basket/checkout) was not always possible (as one might expect, though is probably due to technical limitations).

As well as the ability to purchase on mobile most retailers’ apps tended offer store finders and bar-code scanners as the links to physical or in-store experiences. The suitability of product views on mobile devices varied from brand to brand and device to device meaning consistency of the experience was difficult to rate.

In reality apart from the ability to provide customers the opportunity to make a purchase, currently there seems little incentive for high street retail customers to regularly use dedicated apps or mobile sites, either in isolation to buy or conjunction access other channels. Without explicit reasons to do so it is unlikely the casual shopper will change their current habits to open and check each retailer’s app or mobile site:

**Overall mobile scores:**

<table>
<thead>
<tr>
<th>3. Mobile app/site is usable and offers useful functionality</th>
<th>Overall finding</th>
<th>4. Website benefits from appealing layout and visual design</th>
<th>Overall finding</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Choice between a mobile site/app is suitable</td>
<td>Good</td>
<td>✓ Images/visual displays render well and are optimised for mobile</td>
<td>Good</td>
</tr>
<tr>
<td>✓ Standard shopping functionality is appropriate and works well</td>
<td>Average</td>
<td>✓ Look and feel of the experience matches expectations of the brand</td>
<td>Good</td>
</tr>
<tr>
<td>✓ Additional features are more than just gimmicks</td>
<td>Average</td>
<td>✓ Site/app is appealing and encourages return visits</td>
<td>Good</td>
</tr>
<tr>
<td>✓ Design + usability/responsiveness is appropriate for the device</td>
<td>Good</td>
<td>✓ Customer’s use of mobile complements/encourages appropriate use other channels</td>
<td>Average</td>
</tr>
<tr>
<td>✓ Appropriate cross platform availability</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Investment by retailers into tablets specific apps is still in its infancy. Out of those brands we investigated less than half had dedicated iPad apps. Those who’ve invested are Debenhams, Next, Harrods, Waterstones, and Marks and Spencer. Though interestingly even out of these retailers a number of the apps were less m-commerce directed and more focussed on showcasing the brand, or a particular aspect of the brand’s offering (for example the M & S Home app, see example of excellence below). Those without a dedicated tablet presence are reliant on customers accessing their mobile apps on the tablet (which generally render quite well) or using their browser to visit the retailers’ websites.

Some brands have excelled in providing experiences perfectly tailored for tablet (either because of an app, or simply because the web browsing experience has been optimised for tablet) others simply lack any noticeable strategy for design on this medium. From an omni-channel perspective creating a rich and well-designed app is a brilliant opportunity for retailers to engage their customers and immerse them in a novel experience that will demonstrate the virtue of their brand.

**Overall tablet scores:**

<table>
<thead>
<tr>
<th>5. Site/app offers functionality and interactions optimised for tablet</th>
<th>Overall findings</th>
<th>6. Tablet experience/s is fun and appealing</th>
<th>Overall findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Touch gestures &amp; interactions appropriate for device</td>
<td>Average</td>
<td>✓ App has made use of optimised resolution (e.g. retina display)</td>
<td>Average</td>
</tr>
<tr>
<td>✓ Functionality adequate and</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In-store:

Average score: 4 out of 10

Over the past year or so there has been a big hype over the use of in-store digital, yet bar a few exemplary cases (in flagship stores) the presences of integrated digital experiences that combine in-store was found to be lacklustre at best. The average ratings given against the checklist below reflect a general tendency by brands to acknowledge a requirement to provide at least minimal in-store functionality such as mobile bar code scanning, floor plans and online ordering kiosks. Such basic functionality offers the following problems:

- Awareness and uptake of these channels is likely to be low
- Unless mobile in-store functionality integrates with other channels it stands to not be adopted
- Customers generally use physical signage as a means to navigate in-store so digital needs to enhance or hit on natural behaviours that aren’t already satisfied

The few brands (examples given below) that have given real thought into why customers might use digital in store have realised that it is not about simply having a presence. Instead they have either innovated, or offered useful functionality to:
Provide novel and exciting experiences which replicate the ease of purchase and general comfort attained by shopping online

- Simplify the ability to access rewards for being loyal customers

- Combine the benefits of in-store shopping (e.g. the ability to see and touch products) with digital services (such as Wi-Fi) to access location specific downloads or the ability to check levels of stock

Overall ‘in-store’ scores:

<table>
<thead>
<tr>
<th>7. In-store, physical and Smart TV complement the customer experience (Inc. kiosks, Wi-Fi, tablets, smart TV apps) are used to enhance the customer experience</th>
<th>Overall retailers’ rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Experience is appropriate given the format/context</td>
<td>Average</td>
</tr>
<tr>
<td>✓ Experience enhances a customer's interaction with the brand</td>
<td>Average</td>
</tr>
<tr>
<td>✓ Experience is enjoyable</td>
<td>Average</td>
</tr>
<tr>
<td>✓ Experience integrates with digital channels</td>
<td>Average</td>
</tr>
<tr>
<td>✓ Experience gives a tangible benefit e.g. reduces queuing/gives loyalty rewards/in store information</td>
<td>Average</td>
</tr>
</tbody>
</table>

Social:

Average score: 7 out of 10

With the popularity of Twitter, Facebook, and YouTube a social media presence for retailers is now mandatory for successful brand awareness, customer service and interaction. However the
popularity and the efficacy of campaigns, and the levels of customer service on the social channels vary greatly. A number of retailers have basic strategies that simply involve having a basic presence (and thus lack popularity), whereas others have well curated content and broadcast to their fans information that is popular and received. The most notable examples of well deployed social strategies are where the tone of voice, nature of conversation and the aim of the engagements most closely match what the audience wants to see and hear. In terms of an omni-channel strategy whilst not directly asking customers to complete purchases, a good social strategy can demonstrate not only highlight retailers’ latest offers and products, but also retain loyal customers.

Overall social & communications scores:

<table>
<thead>
<tr>
<th>8. Appropriate adoption of social media and communications strategy</th>
<th>Overall finding</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Twitter</td>
<td>Average</td>
</tr>
<tr>
<td>✓ Facebook</td>
<td>Good</td>
</tr>
<tr>
<td>✓ E-mail newsletter</td>
<td>Good</td>
</tr>
<tr>
<td>✓ YouTube/Video/Smart TV</td>
<td>Average</td>
</tr>
<tr>
<td>✓ Other: pinterest foursquare etc.</td>
<td>Average</td>
</tr>
<tr>
<td>✓ Overall strategy</td>
<td>Good</td>
</tr>
</tbody>
</table>

Omni-channel:

Average score: 8 out of 10

The level of omni-channel success was evaluated by looking into each aspect of the retailers’ digital presence identifying distinguishing features that reflected an ‘omni’ style approach. The following are a set of criteria that give an indication into how well individual brands, and the retail sector as a whole had adopted a truly omni-approach.
Overall, although digital presences have generally improved in a ‘cross’ channel sense, both in terms of functionality (e.g. ways to buy) and brand look and feel. Though there is a distinct lack of a higher level strategy that has deeply thought about which channels customers will use, and how and why they might wish to use them in different ways and seamless move between them.

Generally there has been thought given into the overall channel strategy, particularly retailers ability to meet customer service requirements and provide a consistent brand look and feel. What could be done much better is make sure to design for:

- The likely transitions customers will make across channels and platforms (e.g. are they likely to go from mobile to in-store or in-store to mobile), and making sure experiences match expectations in this respect
- Visits to an individual channel where they will hope to receive an enhanced consistent experience

**Overall omni scores:**

<table>
<thead>
<tr>
<th>9. Digital functionality as a whole meets customer needs</th>
<th>Overall findings</th>
<th>10. Digital brand delivery engages and enhances the customer experience in an appropriate way on all channels</th>
<th>Overall findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ At a macro level is there an appropriate amount of functionality provided through all channels?</td>
<td>Average</td>
<td>✓ Websites/mobile sites/apps have made use of the unique benefits come from accessing the individual channels e.g. offers/features that give benefits</td>
<td>Poor</td>
</tr>
<tr>
<td>✓ Are there notable examples of new and useful features/functionality?</td>
<td>Average</td>
<td>✓ Better than similar retailers/the competition?</td>
<td>Average</td>
</tr>
<tr>
<td>✓ Does the functionality of each channel adhere to a consistent omni-</td>
<td>Average</td>
<td>✓ Omni-channel strategy is reflected in the design of each channel e.g. customer is</td>
<td>Poor</td>
</tr>
<tr>
<td>Channel Strategy</td>
<td>Average</td>
<td>Good</td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td>---------</td>
<td>------</td>
<td></td>
</tr>
<tr>
<td>✓ Changing channel is a seamless experience</td>
<td>✓ Personalisation across channels</td>
<td>✓ Brand's visual look and feel is deployed appropriately on all channels</td>
<td></td>
</tr>
<tr>
<td>✓ Customer service requirements are met</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Average

Good
References & further resources

References


2. IMRG Capgemini m-Retail Sales Index: September 2012: [http://www.imrg.org/ImrgWebsite/User/Pages/IndustryStatistics.aspx?pageID=58&isHomePage=false&isDetailData=false&itemID=0&pageTemplate=9&isAllRecords=true&isArchiveData=False&parentPageID=0]


Further reading & best practice guidelines

Webcredible: ‘The Online High Street: Ecommerce usability for UK high street retailers in 2010’ [http://www.webcredible.co.uk/user-friendly-resources/white-papers/ecommerce-usability-2010.shtml]


http://www.cmo.com/channels/omnichannel-marketing-your-next-challenge


http://itcrossroadsblogs.xerox.com/2012/08/21/5-directives-for-omni-channel-retailing-what-it-really-means/#.UDziCMFITvY

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http://corporate.marksandspencer.com/aboutus/our_plan

http://internetretailing.net/2011/11/ms-brings-online-fashion-instore/

http://www.marketingweek.co.uk/news/ms-in-digital-store-overhaul/4003111.article
About Webcredible

Webcredible is a pioneering customer experience agency delivering strategy, research and design services. We create and perfect digital platforms and interfaces that deliver on the business challenges, goals & KPIs you're working to.

Working across websites, mobile devices, intranets and applications, our joined-up consultancy service creates a consistent user experience across all channels for our clients.

Webcredible was launched in 2003 as one of the first specialist user experience agencies. We’re comprised of true digital and user experience experts & enthusiasts that are passionate about optimising customer experiences.

Our work results in measurable improvements, for example:

- 44% conversion improvement and a 168% uplift in leads for Countrywide
- 36% increase in made-to-order online revenues for Laura Ashley
- 50% reduction in mobile homepage drop-offs for Macmillan Cancer Support
- 80% increase in hotel ‘look-to-book’ conversions for Thomson

Highly respected in the digital community, Webcredible is regarded as one of the most collaborative, innovative and respected user experience agencies in the UK. 50+ people attend our training courses monthly, our 200+ research articles and reports have been re-published on 100s of websites and we receive 250,000 visitors to our website each month.