

Making the Digital Connection: Why Physical Retail Stores Need a Reboot



Executive Summary

Shopping in physical stores offers consumers something unique and valuable compared to the digital domain: a social experience and a tactile experience. But, our latest research shows that shoppers are now seeing less value and pleasure in this core element of the physical retail experience. Our global survey – spanning 6,000 consumers and 500 retail executives – found that one-third of consumers would rather wash dishes than visit a retail store.

A key reason for this declining value is that consumers now expect a physical user experience that rivals what they find online, from expecting goods to be in stock to being able to choose from multiple delivery options. Consumers wish to use technology to help them engage with the store at every step of the shopping journey.

Unfortunately, these new expectations are not being met, and as a result consumer satisfaction for retailers is worryingly low. Nearly one in two retailers in our survey were given a negative NPS by consumers. While many retailers are taking steps to remedy this through combining the virtues of physical stores with new technologies, over half of retail executives in our survey feel that the digitization of their stores is moving too slowly as they struggle with a range of challenges, from adequate training for store associates to difficulties in measuring the ROI of digital investments.

More concerning, many retailers are not implementing the digital initiatives that consumers want, achieving significant scale, or delivering a return. We only found a minority of Digital Leaders who have implemented relevant digital initiatives in the majority of their stores and realized significant benefits.

The winners of the future will be those that are transforming the customer experience through new technologies, digitizing operations, and putting in place the right people capabilities. In this report, we provide a framework for retailers to diagnose where they are in terms of becoming a Digital Leader and the strategic priorities for ensuring they do not just match fast-changing consumer expectations, but have the agility and vision to stay ahead of what consumers want from the physical store.

Introduction

The way we shop and buy has undergone a fundamental revolution, with consumers armed with more knowledge, power and choice than they have ever had. As consumer expectations have changed and demands intensified, the physical retail experience needs to keep up. Consumers are bringing their online expectations – personalized and hassle-free shopping – into the store. However, our

research shows that stores are struggling to meet these heightened expectations:

- One third of consumers would rather wash dishes than visit a retail store
- 40% see in-store shopping as just a chore to undertake. In one country – Sweden – this has even reached more than 1 in 2 consumers (see Figure 1).

One-third
of consumers would rather clean dishes than visit a retail store

Figure 1: Percentage of Consumers Who See Shopping in Stores as a Chore and Would Rather Wash Dishes or Clothes than Go Shopping in Stores



Source: Capgemini Future of Retail Store Survey

In this Future of Retail Store Survey, we examine the causes behind this trend and the solutions that retailers can put in place, drawing on research involving 6,000 consumers and 500 retail industry executives in 9 countries (the research methodology is outlined in detail at the end of this report). In this paper, we examine five key questions:

- How are digital trends affecting consumer habits and expectations?
- Why are consumer expectations from stores not being met?
- Are retailers responding with enough firepower and speed to this challenge?
- What does the future of the store look like?
- What path do we take to the store of tomorrow?

How are digital trends affecting consumer habits and expectations?

Consumers expect a similar user experience from physical stores as they find online.

Shopping online offers a rich user experience and expectations for physical stores are therefore changing. As online makes price comparison easy, consumers are transferring those expectations to physical stores. According to a UK store manager we interviewed, “There has been an influx of customers challenging our prices for being higher than the prices online. They expect us to do some sort of price matching, but oddly enough it’s against ourselves and not our competitors.” In our survey, 30% of consumers said they had experienced lack of consistency in discounts in-store versus a website or app. Such an experience can eventually drive the customer toward online channels, and potentially to online-only competitors. Expectations around information on stock levels are changing too. As one retail store manager told us, “Consumers now have high expectations around stock levels and service. They expect the products they are looking for to be available when they need it just as easily as online. But since they are also making the effort to come to the store, there had better be good service to accompany the product.”

Consumers want more delivery options from physical stores. The home delivery service offered by pure-play ecommerce firms is affecting expectations of physical retail stores: 73% of

consumers find same-day delivery of products purchased in-store useful (see Figure 2). Physical stores opened by digital-native retailers, such as Bonobos, ship the product to consumers’ home after an in-store purchase.

Consumers want a retail store+. Today, stores cannot function only as a space for buying products. Over half of consumers in our survey (57%) want stores to serve a higher function than simply selling the product. In China, almost 80% of consumers want other activities in a store. One store manager we spoke to summed it up by saying: “Consumers want to be entertained in the store; stores need to engage the five senses.” For certain categories, purchase behavior is also changing. One electronics store manager told us how customers buy online from the store’s website but then want to come in-store for setup or device support.

Consumers want to check product availability. Three out of four consumers would find it useful if they could check product availability before visiting a store. But this feature is not correspondingly high on priority lists of retail executives. Only half of them have implemented this capability in a majority of their stores. Having the right systems and processes in place to meet consumers’ expectations around stock availability is still out of reach of many retailers.

“
Consumers want to be entertained in the store; stores need to engage the five senses.”



- A Store Manager

Figure 2: What do Consumers Want from a Store?

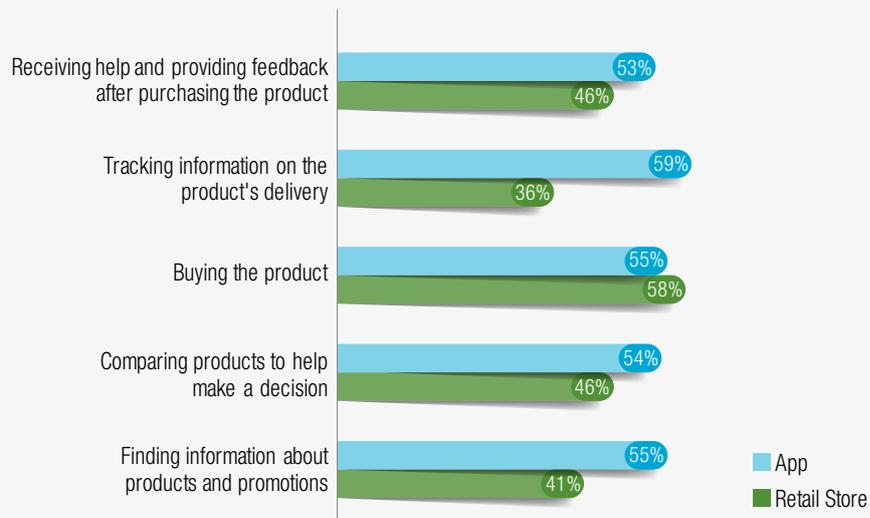
Consumer Expectation from Store	Consumer Preference
Ability to check product availability before visiting a store	75%
Same-day delivery of products purchased in-store	73%
Need products quickly	70%
Need to touch and feel products	70%
Loyalty points for spending time in store and revisiting	68%
Prior appointment with store experts to fulfill your needs	62%
Lower prices with store membership (Like Amazon Prime)	61%
Social experience with friends/family	60%
Additional activities in-store	57%

Source: Capgemini Future of Retail Store Survey

The Store is Becoming...an App

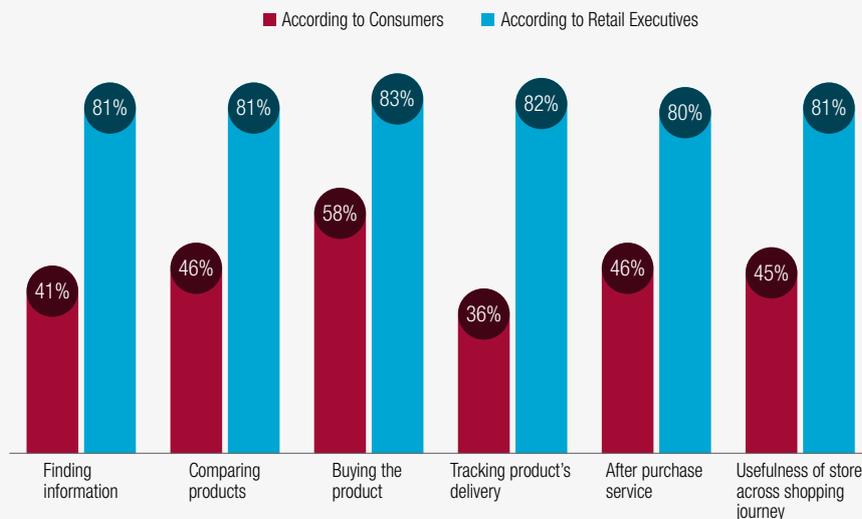
Tech entrepreneur Marc Andreessen famously said that “software is eating the world”, and while this claim was made in 2011, it is increasingly apt for retail today. We found that less than a third of consumers around the world prefer a store to an app, and for many the two channels are at best equal. Increasingly, the mobile app is seen as more relevant. Consumers find mobile apps more useful than stores for finding information about products and promotions (55% vs 41%), comparing products (54% vs 46%) and providing feedback (53% vs 46%). There is also a strong disconnect between retail executives’ perception and consumer sentiment: while 81% of retail executives see the store as important, this drops to 45% for consumers.

Figure 3: Usefulness of Retail Store and App over a Purchase Journey



Source: Capgemini Future of Retail Survey

Figure 4: Usefulness of Store According to Consumers and Retail Executives



Source: Capgemini Future of Retail Store Survey

Source: Wall Street Journal, “Why Software is Eating the World”, August 2011

Why are consumer expectations from stores not being met?

Overall, the 6,000 consumers we spoke to are not satisfied with their in-store shopping experience, with very low Net Promoter ScoresSM (NPS[®])¹:

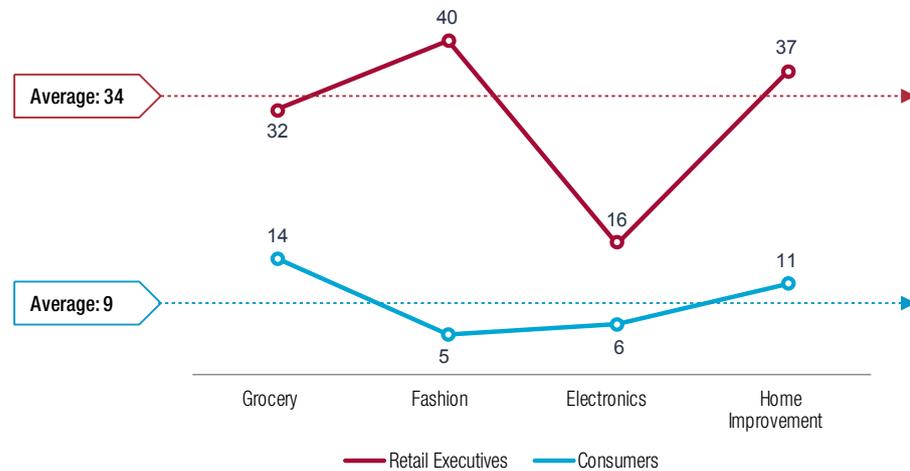
- 48% of brands were given a negative NPS by consumers and we found a significant disconnect between consumers and retailers. We evaluated the retail executives' perception of NPS by asking them if they thought their customers would recommend their store. While

the average NPS score by retail executives is 34, this drops to 9 for consumers (see Figure 5). It is clear that retailers vastly underestimate customer dissatisfaction in stores.

- The crucial 18-24 demographic yielded a negative NPS score of -3. This is the demographic that is most attracted to online shopping (see Figure 6).

48% of brands received a negative NPS from consumers

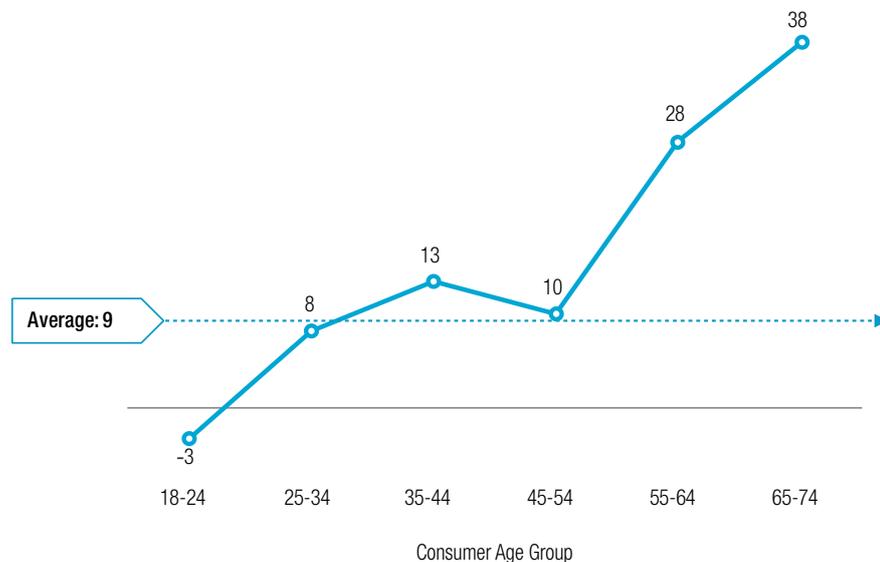
Figure 5: Net Promoter ScoresSM comparison between Consumers and Retail Executives



Source: Capgemini Future of Retail Store Survey

-3 NPS from the 18-24 demographic group

Figure 6: NPS by Consumer Age Group, select countries, 2016



Source: Capgemini Future of Retail Store Survey

¹Net Promoter Score measures the loyalty that exists between a provider and a consumer. It is calculated based on responses on a 0-10 scale to a single question: How likely is it that you would recommend our company/product/service to a friend or colleague?

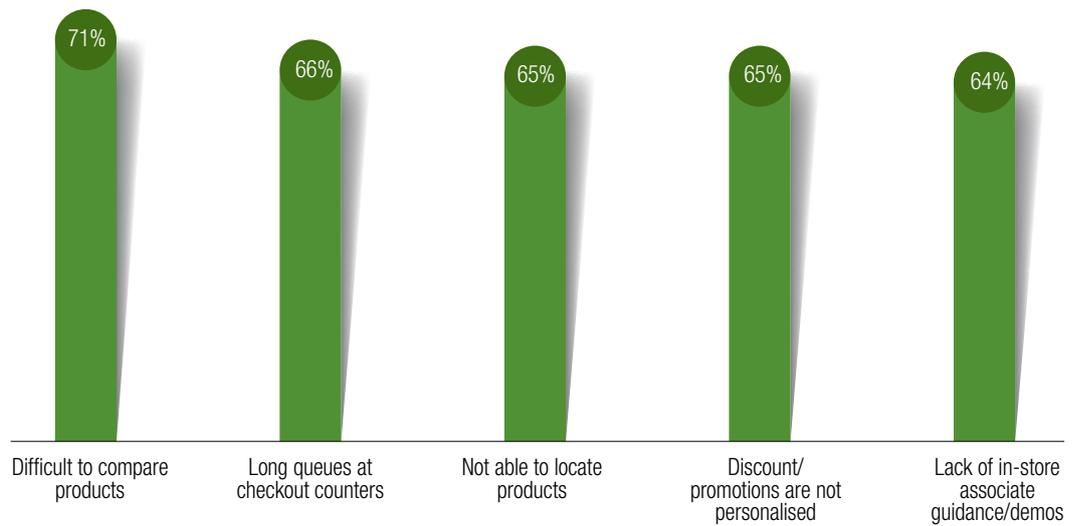
Net Promoter, NPS, and the NPS-related emoticons are registered service marks, and Net Promoter Score and Net Promoter System are service marks, of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld

2 in 3
consumers see
long queues
at checkout
counters as
their main
frustration

In our survey, consumers pointed to a wide variety of reasons for their dissatisfaction. They include difficulty in comparing products, long queues at checkout counters, not being able to find products,

and non-availability of store employees. These frustrations are common across sub-sectors, as Figure 7 shows.

Figure 7: Top Frustrations Consumers face in Retail Stores

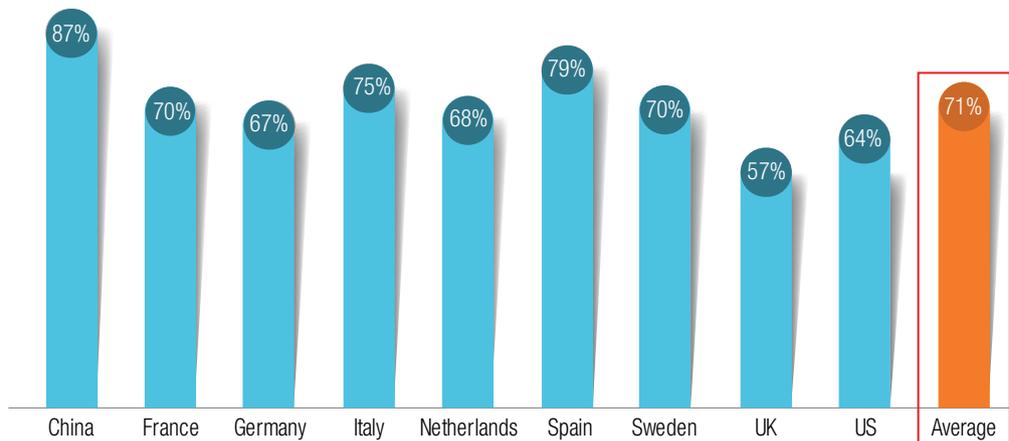


Source: Capgemini Future of Retail Store Survey

This dissatisfaction is a significant threat, particularly for large-format retailers. Our survey found that 71% of consumers would be willing to bypass traditional retailers to buy directly from manufacturers or large internet players in the future, such as Google

(Google Express), Apple, or Facebook if these players partnered with local retailers that handled the last-mile delivery. This trend would essentially disintermediate the traditional large-format retail store (see Figure 8).

Figure 8: Consumers who will bypass traditional retailers to buy directly from manufacturers or online giants



Source: Capgemini Future of Retail Store Survey

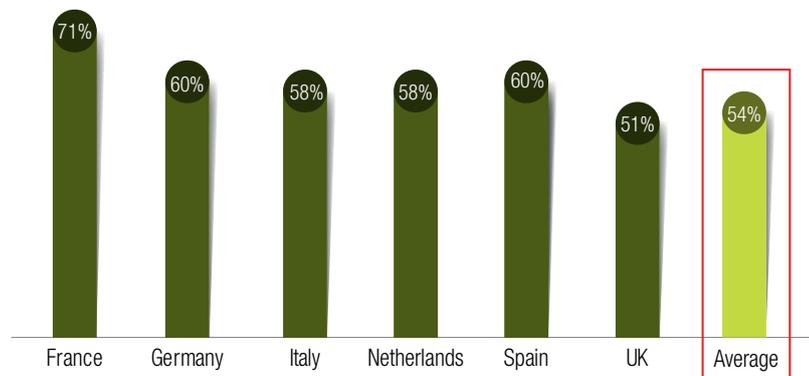
Are retailers responding with enough firepower and speed to meet this challenge?

Introducing technology into the overall consumer experience for physical stores will be key to addressing these falling satisfaction levels. Among consumers who visited stores offering digital technologies, 59% found them useful and 50% use them frequently. And this was true not just in-store, but in the overall purchase cycle, extending

to delivery. Retail professionals clearly understand that this is critical, with 78% saying that their C-level executives classify in-store digitization as a top management priority. At the same time, however, 54% of retail executives agree that the digitization of their stores is moving too slowly (see Figure 9).

54%
retail executives
who believe that
the digitization
of their stores
is moving too
slowly

Figure 9: Percentage of Retail Executives Who Believe that Digitization of Physical Retail Stores is Too Slow



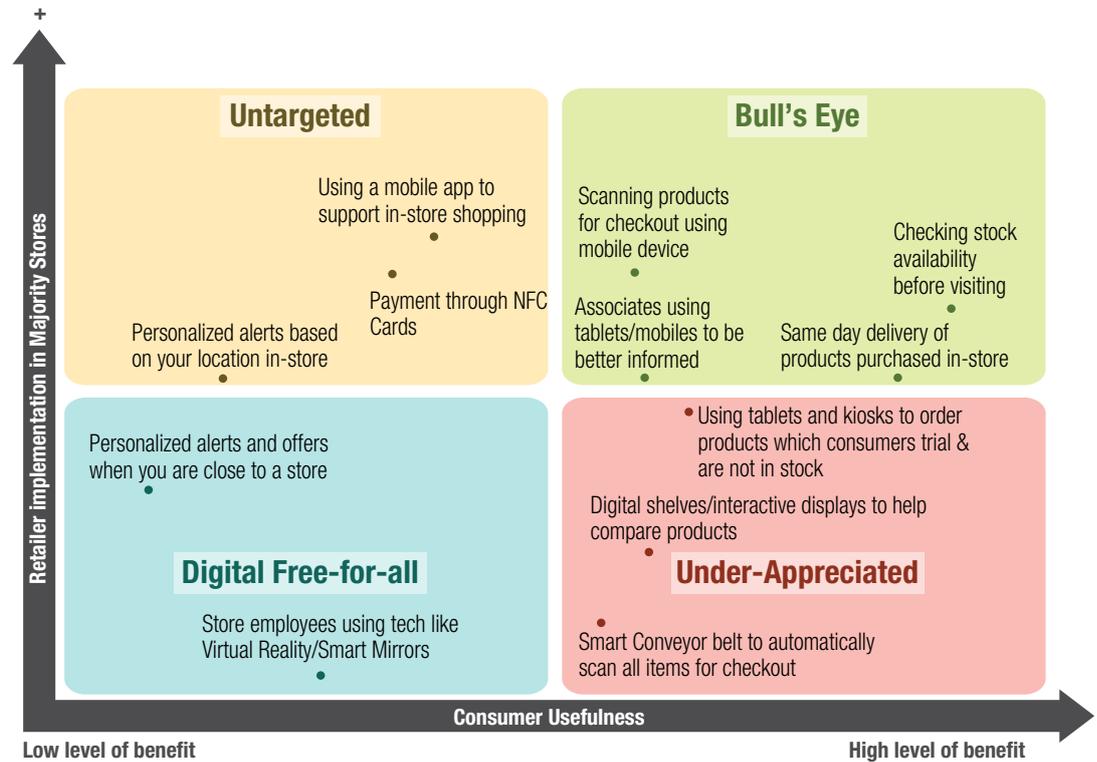
Source: Capgemini Future of Retail Store Survey

Retailers are not implementing the right in-store digital initiatives. We found a mismatch between the in-store initiatives that retailers are implementing and what consumers find useful. In Figure 10, the technologies in the “Bull’s-Eye” quadrant are those that have been implemented in most retail stores and are also rated as useful by consumers. But as the figure shows, retailers are also investing in technologies that are less relevant.

Retailers suffer from an inability to measure return on investment. When we asked retail executives why digitization efforts were moving too

slowly, 43% pointed to the inability to measure the benefits from what has been implemented (see Figure 11). This resonates with Douglas Baldasare, CEO of ChargetSpot, a customer engagement startup, who said: “I think one of the key challenges is retailers getting comfortable with investments in new technology that are not yet proven. It’s easy for retailers to put new technology into a few stores. It’s easy for them to try cool, fun innovations in a store of the future. But what may not be so easy and obvious is how to prove the ROI on those various investments they make. What’s needed is a trusted outside partner to lead an analytical ROI study.”

Figure 10: Retailer implementation in Majority Stores Vs Consumer Usefulness of In-Store Digital Initiatives



Source: Capgemini Future of Retail Store Survey

Figure 11: Top Reasons for Slow In-Store Digitization



Source: Capgemini Future of Retail Store Survey



Technology is only useful if people know how to use it. That includes both the employees and the customers.



A store manager

Retail executives think store associates are not doing enough – store managers think otherwise.

Many retailers are behind the curve in digitizing the physical store. However, the reasons for this failure differ depending on who you are talking to. In our research, 40% retail executives who stated in-store implementation is slow think store managers and associates are not promoting in-store digital initiatives. Healey Cypher, CEO, Oak Labs, a startup providing interactive fitting rooms, sympathizes with this point of view, saying: “Associates not adopting technology is the primary reason that new in-store technology fails.” But store managers point to the need to ensure their people are properly trained on new tools. One store manager at a leading retail chain in London told us: “Technology is only useful if people know how to use it. That includes both the employees and the customers. We have to do employee training whenever new things come in”. Digital sprinters – those that have implemented digital technologies widely and generated significant benefits – embrace this need. In our survey, 97% of Digital sprinters’ executives say they train store associates compared to 58% of laggards. See “Understanding digital sprinters” section for more background on these successful digital retailers.

Retailers lack a solid technology foundation and data integration.

The top technology challenges facing retailers are difficulty in integrating legacy retail systems to in-store digital initiatives (58%) and lack of real-time product inventory data across stores (59%). Over 40% retail executives say they are still implementing foundational capabilities to enable digital, such as in-store Wi-Fi, store data collection, aggregation and visibility, point of sale with mobile capabilities. On the data front, organizations are still struggling with siloed information. Artem Mariychin, CEO of Zodiac Metrics, a startup applying predictive analytics to customer behavior, believes that “The biggest challenge for retail companies is that data assets are not consolidated.” Without this integrated view, retailers cannot meet the core expectations that consumers have today: that the products they want to buy will be available, as they invariably are when they shop online.



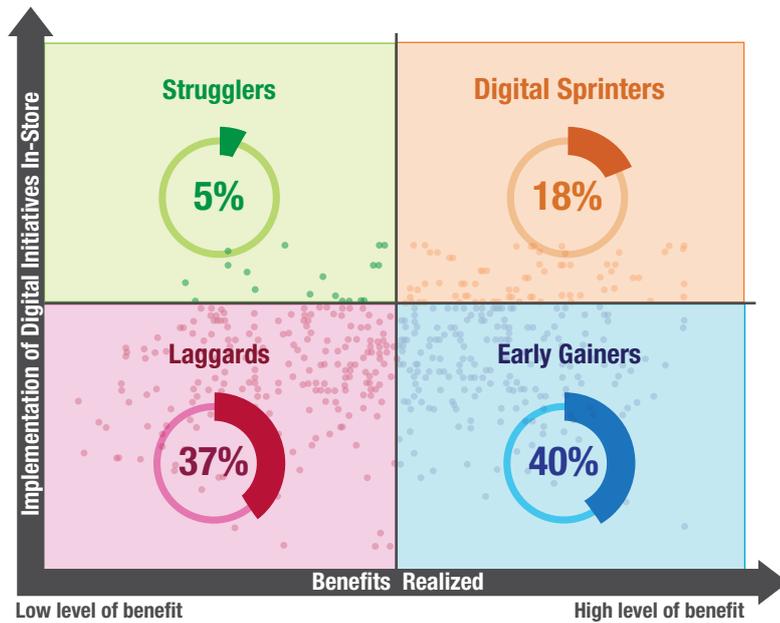
Understanding Digital Sprinters

Digital Sprinters Combine Digital Initiatives Implemented in Majority of Stores and Strong Benefits

Digital initiatives are implemented in majority of stores

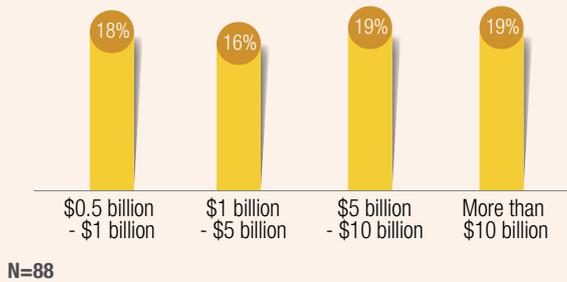
Digital initiatives are not implemented/ Implemented in few stores

N=500

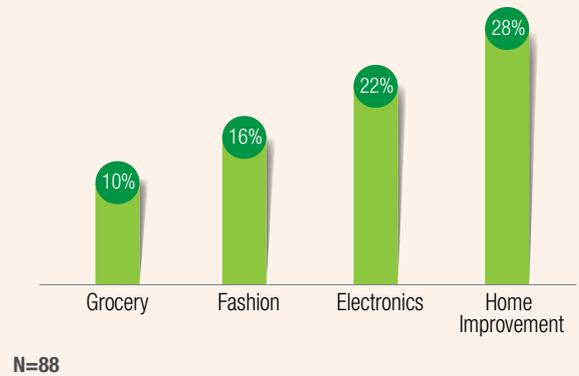


Where are Digital Sprinters found?

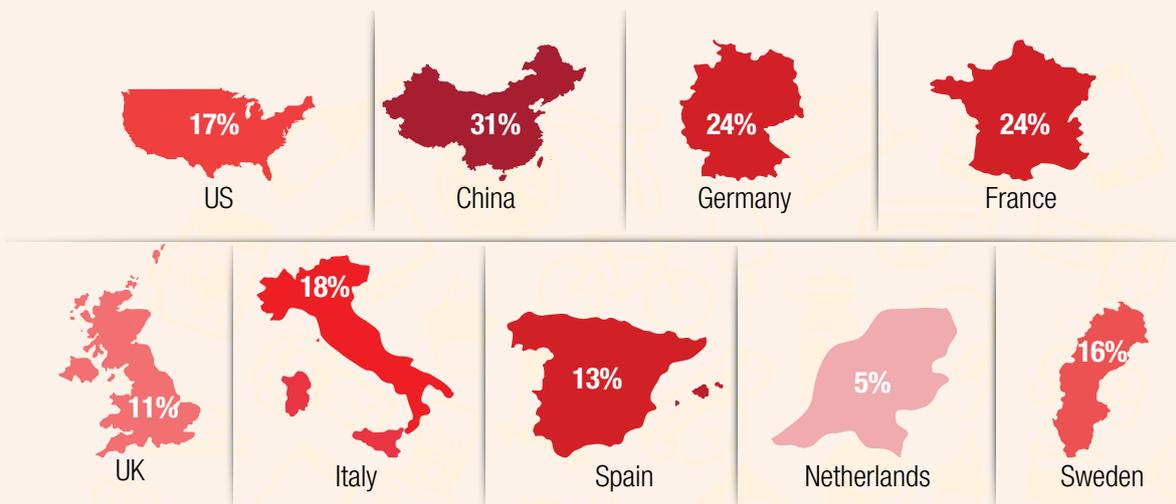
Digital Sprinters by size



Digital Sprinters by sub-sector



Digital Sprinters by country

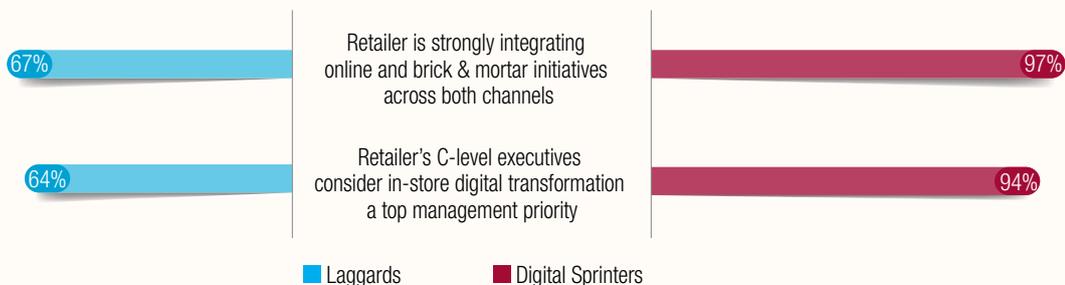


DNA of Digital Sprinters

Digital Sprinters have Clear Vision of the Future of Retail Store



Digital Sprinters have Strong Governance Practices



Digital Sprinters Make Better Use of Data



Digital Sprinters keep their Store Associates Engaged to Enhance Customer Experience



What does the store of the future look like?

The store of the future will be one that successfully meshes the physical with digital.

Consumers are increasingly comfortable using digital devices and technologies in-store. Our survey found that when technologies are available, 68% of consumers use in-store tablets and kiosks to order a product after testing it in-store or if it is not

immediately available in stock. However, only 47% of retail executives in our study have implemented these technologies in their stores. This is in stark contrast to leaders who are not only implementing new technologies, but doing so in an integrated and strategic way across the entire customer experience, avoiding a piecemeal approach.

Figure 12: An integrated approach to digital

Target	Lowe's
<ul style="list-style-type: none"> Has a mobile app that shows consumers where products are located in the store, using a pin feature similar to navigation maps, as well as the deals that are available. Has launched a pop-up store in New York, Target Wonderland, which uses personalized RFID tags to scan items and add them to a virtual shopping cart. Consumers can checkout and pay for the items at the end of their visit, removing the need to carry their products around. Is testing the usage of robots inside stores to assist with inventory from shelves to carts to track misplaced, mispriced products and low inventory. Is rolling out RFID "smart labels" on price tags that will help improve Target's accuracy on in-stock position. It will help consumers identify correctly if a product they want is available at a store before they get to it. 	<ul style="list-style-type: none"> Has augmented reality showrooms that let consumers design an ideal kitchen or bathroom and visualize what the outcome would look like in real life. Its "Virtual Room Designer" allows consumers to create what they want from home and then go to a store to have it finalized. Is experimenting with an in-store robot to help consumers find products and show relevant advertisements and coupons along the way. Is working to personalize the consumer experience with 3D printing capabilities. Consumers can customize or scan items and print them in-store to see the right color shade or replace difficult-to-find parts.



In the post-Amazon era, retail cannot compete on proximity, selection and price - experience is the only way to win.



- Healey Cypher, CEO, Oak Labs

Source: Company Press Releases and News Articles

A range of start-ups are developing technologies for the store of the future, and a review of their capabilities points to some of the features that could define tomorrow's physical-digital store:

Visual experience: SaaS and cloud-based device management solution provider, Moki, installs tablets in aisles that help to create an interactive digitally-driven, in-store visual experience. The company claims that these tablets have helped retailers increase sales by 40% year on year².

Convenience: The technology itself does not need to be highly complicated to have an effect. For instance, installing cell phone charging kiosks can have a tangible impact. According to Douglas Baldasare, CEO of customer engagement startup ChargeItSpot, "We put cell phone charging stations into retail stores that are free for consumers to use. When shoppers charge their phone, it's proven that they spend 2.15x the time in store, 29% more dollars, and they convert at a 54% higher rate³."

Internal Navigation: Point Inside, a startup that provides services on product search, recommendation, store maps and analytics, says, "Customers that interact with our services (including interactive store maps) are buying 22% more per trip⁴."

Personalized Messaging: Seed Digital Media, a data-driven loyalty marketing startup, outlines the impact this approach had for a supermarket client. "When people walk into the supermarket chain they receive a personalized message on SMS. We got a 14% increase in the basket size, and also higher visit frequency⁵."



Transformation for a physical retailer happens when you transform the store associates who service customers.



- Ali Asaria,
CEO, Tulip Retail

The Store of the Future...From the Ecommerce Leader of the Present?

72% of the consumers in our survey told us that long queue at grocery checkout counter can drive them to online shopping. While traditional retailers are addressing the problem of long lines and tedious barcode scanning through initiatives such as self-checkouts, click and collect and same-day delivery; online tech giant, Amazon has created a checkout-free store, Amazon Go.



Customer scan their smartphones when they enter the store and with a combination of cameras, microphones, machine learning and aggregation of data from different sensors, Amazon's "Just Walk Out Technology" automatically detects when products are taken from or returned to the shelves charging a customer's Amazon account as they walk out with the items.

Source: Amazon press release

Social and inspiring experiences are at the core of the store of the future. Consumers want a retail store that goes beyond product sales and creates a social and inspiring experience. In Boston, office supplies firm Staples is partnering with a startup to use a portion of their stores as communal workspaces, where subscribers can access desks and conference rooms for a monthly fee. The aim is to drive up store traffic and increase sales⁶. Reebok FitHub stores include a gym⁷ to drive fitness enthusiasts into the store. As Healey Cypher, CEO of Oak Labs, a startup providing interactive fitting rooms, says: "In the post-Amazon era, retail cannot compete on proximity, selection and price—experience is the only way to win."

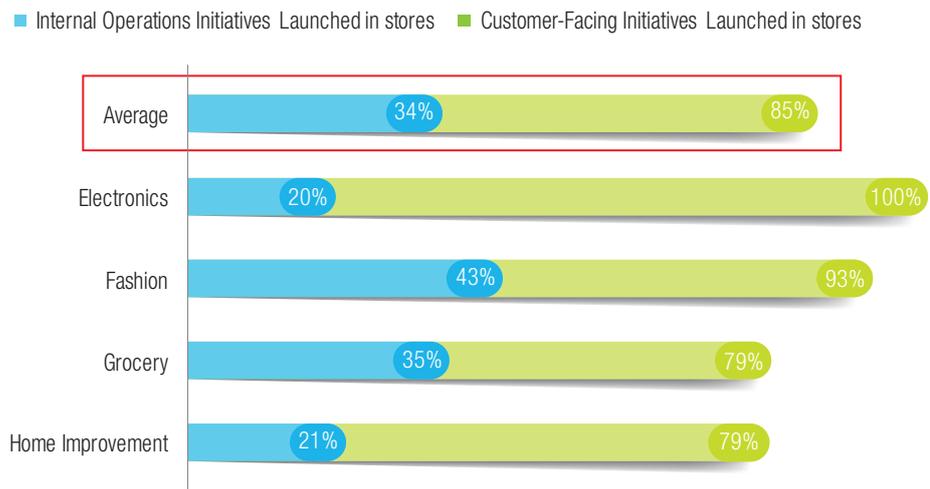
The role of the store associates is re-imagined. Digital stores need digitally-enabled sales associates. This means a sales associate who is fully trained to use digital technologies to bring value to customers. As stores expand their delivery models, such as click-and-collect, this need for tech-savvy associates grows. Ali Asaria, CEO of Tulip Retail, a startup that empowers store associates

through mobile platforms, says: "Transformation for a physical retailer happens when you transform the store associates who service customers. By investing in people and giving them better tools, you are going to see experiential transformation that we are all looking for."

The store is a physical entity supported by digital operations. Retailers also need to focus on the operations that enable an enhanced customer experience. We found that over 85% of retail executives have focused on launching consumer-facing digital initiatives in-store compared to only 34% retail executives who have launched internal store operations initiatives (see Figure 13). Eric Johnson, CEO of Moki, a SaaS and cloud-based device management solution provider, feels that many are struggling in the operational domain: "I think a lot of retailers are far behind on the operational side. It is very hard for them to change as well, because unless they can show any initiative is going to drastically reduce cost, it is hard for them to implement it. In operations you don't fix it if it is not completely broken."

250
hours Vs
2-3 hours
Time taken
for humans
Vs a robot
every week for
auditing, as per
Simbe Robotics

Figure 13: Retailers by Type of Initiatives Launched (Customer-Facing vs. Internal Operations)



N = 140

Source: Capgemini Analysis

Digital technologies can enhance back-end operations, building better connections with the consumer. Areas include:

Robotics for stock inventory management. Brad Bogolea, CEO of Simbe Robotics, a robotic shelf auditing and analytics startup, says: "Today a large-format mass-market retailer may spend 250 human hours per week auditing. We can do the same job in that store in about 2-3 hours⁸."

In-store analytics. According to Bridget Johns, Head of Marketing and Customer Experience at in-store analytics company RetailNext: "Our retail customers typically see 6-8% increases on conversion from implementing ecommerce style in-store analytics. Another 6% increase when they align staff to consumer traffic. For instance, for a multi-category retailer just focusing on the shoe department, we see 20 to 30% lift in sales through a combination of staffing initiatives, merchandising initiatives, and marketing initiatives⁹."

Visibility. The digital store of the future will have a digital back-end operation that gives managers and associates full visibility of inventory across channels, connecting to the supply chain. A number of startups have developed technologies that auto-alert consumers who have a click-and-collect order when they are in proximity to a store. If the customer opts to collect, it sets in motion a process whereby the parcel is ready to be collected when the customer walks in-store.

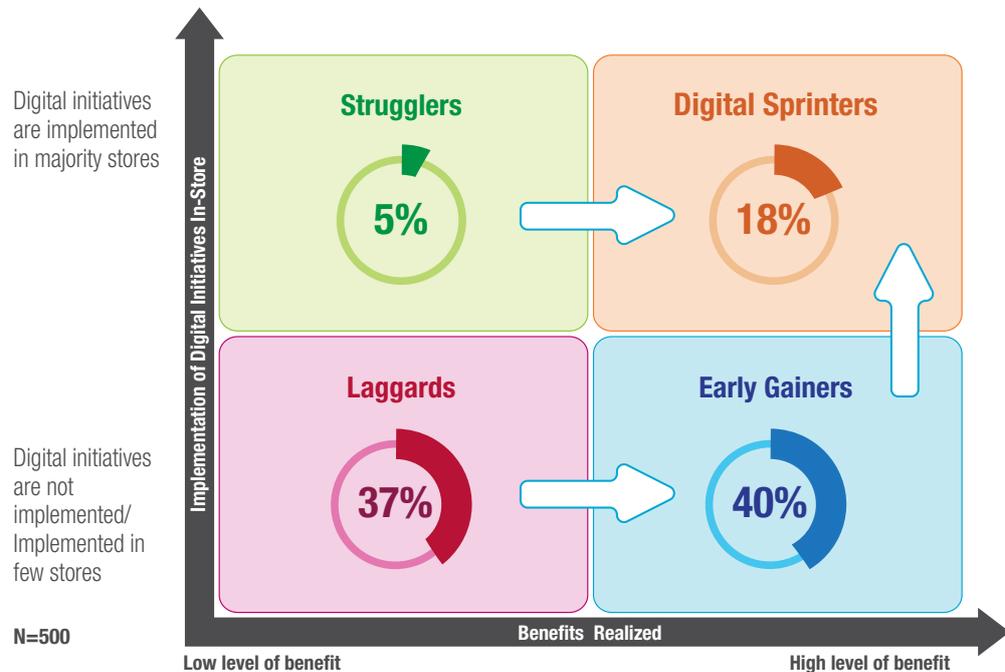
Associate-focused solutions. A number of startups have developed solutions that help tie store associates to where consumers are. By deploying beacons throughout the store, retailers are able to take that data and match it to video feeds of the physical store. Retailers therefore understand where consumers are versus their store associates, moving associates in real-time to where they are needed to serve consumers.

What path do we take to the store of tomorrow?

The road to the store of the future will be different depending on the digital maturity of each organization. Drawing on our research data, we

see four main groups (see Figure 14), with Digital Sprinters the most advanced.

Figure 14: Path to a Digital Sprinter



Source: Capgemini Future of Retail Store Survey

Early Gainers need to scale fast. Early Gainers have got one thing right – they have focused on digital initiatives that deliver value. But Early Gainers cannot just understand what works, they must also scale those initiatives, with many having not yet delivered across a majority of stores. This means addressing some of the key challenges of Early Gainers, such as their limited ability to use consumer data from online or in-store to improve the consumer experience and store operations. One way forward is dedicated data labs. US-based retail chain Nordstrom, for instance, has set up the Nordstrom Data Lab to develop new offerings backed by data-driven insights¹⁰.

Strugglers should invest in sound governance mechanisms. Strugglers have implemented digital initiatives in a majority of their stores but are failing to derive the desired benefits. Poor governance is a likely factor in this: Strugglers fare even worse than Laggards in having a clear view of where to invest in new technologies and digital initiatives. One way forward is to carve out these responsibilities to a standalone unit. In 2010, Walmart established its

Walmart Global eCommerce division. It did so by consolidating its eCommerce activities around the world, setting the stage for an organization-wide effort to build a digital footprint and integrate it with physical shopping experience¹¹.

Laggards Need to Inject a Dash of Aggression in their Digital Initiatives. Laggards perform poorly in areas that include digital governance, store associate empowerment, inventory data and consumer data usage. They have also limited implementation to a small subset of their stores. Laggards need better governance, more use of data to increase in-store personalization, and a transformation in associate empowerment. Laggards also need to have a greater level of involvement from their C-level executives in store transformation. While over 94% of digital sprinters' executives considered in-store digital transformation as a top management priority, only 64% of laggards thought so.

CONCLUSION

Over the next decade, stores will face more change than they have experienced in the past half century as they race to meet customer expectations. Retailers should see these heightened expectations as an opportunity to accelerate their ongoing digital transformation. The importance of the physical store is evidenced by the increasing number of ecommerce players who are opting for physical spaces. Stores are relevant in our technology-enabled age, but only if bricks-and-mortar retailers make a digital connection with their consumers.

Research Methodology

The research for this study was conducted in the following phases:

Consumer Survey

This phase involved conducting a survey of 6,000 consumers across the US, the UK, France, Germany, Italy, Spain, Sweden, Netherlands and China in November 2016.

Survey of Retail Executives

This phase involved conducting a survey of 500 senior retail executives across the US, the UK, France, Germany, Italy, Spain, Sweden, Netherlands and China in November 2016. The retail executives surveyed were part of the retail operations or strategy teams. 47% of retail executives surveyed belonged to organizations that had revenues of more than \$5 billion.

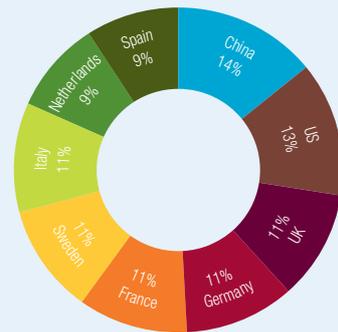
Focus Interviews with Retail Tech Startups

We interviewed 24 startups focusing on retail technologies to understand how the upcoming retail innovations could transform stores.

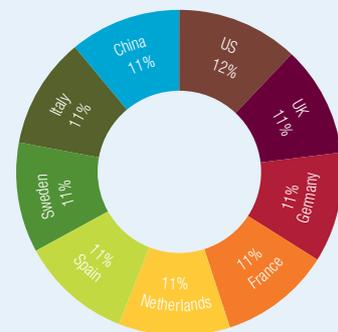
Focus Interviews with Store Managers

We interviewed select store managers for international brands with stores in London to understand the level of implementation, benefits and challenges for in-store digitization initiatives.

Split of Consumers by Country



Split of Senior Retail Executives by Country



Unlock the True Value of Retail with The Smart Digital Store from Capgemini and Intel

Capgemini's Smart Digital Store framework and platform offers a breadth of services, tools and accelerators, which can help retailers kickstart their store transformation journey, regardless of where they start.

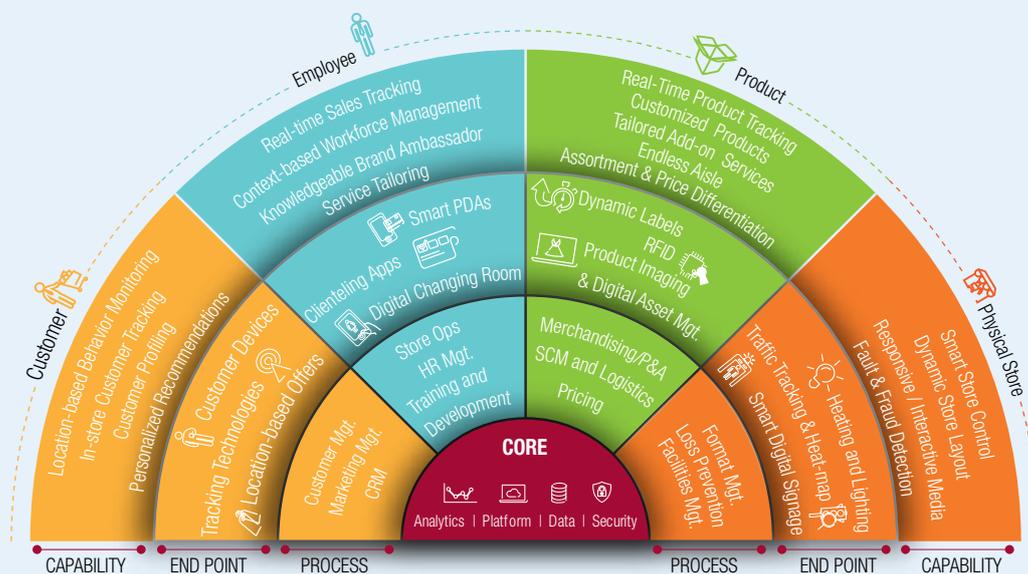
Our capabilities include:

- Vision and strategy definition
- Road mapping
- Standard architecture, components and integration to leverage both new and existing solutions
- Real-time analytics
- Developing innovation agenda for retailers, including discovery, deployment and scale, through our Applied Innovation Exchange Network
- Specific ready-made solutions include:
 - Digital kiosks and endless aisles
 - Smart digital wall and connected tablet
 - Client-assist tablet and service tailoring
 - Context-based workforce management
 - Connected Bag (including facilitating cross-sell/ up-sell opportunities and streamlined checkout)
 - Point of Sale (POS) solutions

Why Us? Our priority is to create measurable business value for our retail clients. Our integrated approach within the Smart Digital Store framework ensures that we tailor the right solution to suit each retailer's specific needs while ensuring that initiatives don't operate in isolation. We help retailers shape their unique brand vision for what success looks like today and tomorrow and provide the connective tissue between the key ingredients in the retail store experience – the customer, the store associate, the product and the physical store itself.

Our partnership with Intel enables our clients to gain competitive advantage, through the latest, reliable and scalable technology, along with real world industry experience. Together, Capgemini and Intel are building the Future of Retail. Wondering where to start? Get in touch with us now.

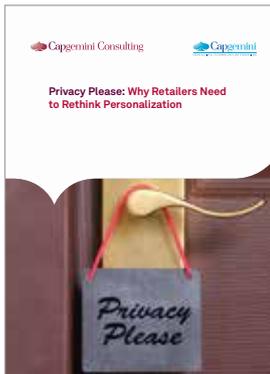
Capgemini's Smart Digital Store Framework



References

- 1 Net Promoter Score measures the loyalty that exists between a provider and a consumer. It is calculated based on responses on a 0-10 scale to a single question: How likely is it that you would recommend our company/product/service to a friend or colleague?
Net Promoter, NPS, and the NPS-related emoticons are registered service marks, and Net Promoter Score and Net Promoter System are service marks, of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld
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 - 6 WSJ, "Staples Finds New Use for Its Stores: Office Space", April 2016
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 - 11 For more details refer to Capgemini Consulting's Digital Masters research paper on "Walmart - Where Digital Meets Physical"
<https://www.capgemini-consulting.com/walmart-where-digital-meets-physical>
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About the Authors



Kees Jacobs

Vice President, Capgemini
kees.jacobs@capgemini.com
[@kees_jacobs](#)

Kees is an industry recognized practitioner with Capgemini's global sector for consumer products and retail, with more than 25 years of experience in these industries. Kees is responsible for Capgemini's strategic relationship with The Consumer Goods Forum and has co-authored many research reports on the consumer products and retail industry



Peter Lindell

Head of Consumer Products, Retail, Distribution and Transportation Sector, Capgemini
peter.lindell@capgemini.com
[@peterlindell](#)

Peter is a leader of Capgemini's Consumer Products, Retail, Distribution and Transportation sector in Europe and globally responsible for Innovation in the sector. With his 15+ years of experience in management consulting and IT, Peter is a key adviser to global retail and consumer products companies.



Marc Rietra

Principal Consultant, Consumer Product & Retail, Capgemini
marc.rietra@capgemini.com

Marc has more than twelve years in retail working with leading brands in Europe. Marc leads Capgemini's consumer products and retail team in Germany.



Melissa Davison

Principal Consultant, Capgemini
melissa.davison@capgemini.com
[@melissaldavison](#)

Melissa is a principal consultant in the Retail Operations capability of Capgemini Consulting UK. She has deep experience in retail consulting with grocery, clothing, homeware retailers in the UK and Internationally.



Jerome Buvat

Head, Digital Transformation Institute
jerome.buvat@capgemini.com
[@jeromebuvat](#)

Jerome is head of Capgemini's Digital Transformation Institute. He works closely with industry leaders and academics to help organizations understand the nature and impact of digital disruptions.



Subrahmanyam KVJ

Senior Manager, Digital Transformation Institute
subrahmanyam.kvj@capgemini.com
[@Sub8u](#)

Subrahmanyam is a senior manager at the Digital Transformation Institute. He loves exploring the impact of technology on business and consumer behavior across industries in a world being eaten by software.



Sumit Cherian

Senior Consultant, Digital Transformation Institute
sumit.cherian@capgemini.com
[@SumitCherian](#)

Sumit is a senior consultant at the Digital Transformation Institute. He is an avid follower of industry innovations and how digital technologies disrupt the business landscape.



Digital Transformation Institute

dti.in@capgemini.com

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For more information, please contact:

Global

Kees Jacobs

kees.jacobs@capgemini.com

Adgild Hop

adgild.hop@capgemini.com

Peter Lindell

peter.lindell@capgemini.com

Ruurd Dam

ruurd.dam@capgemini.com

Michael Petevinos

michael.petevinos@capgemini.com

Marc Rietra

marc.rietra@capgemini.com

France

Olivier Trouvé

olivier.trouve@capgemini.com

Eric Masson

eric.masson@capgemini.com

UK

Melissa Davison

melissa.davison@capgemini.com

Germany, Austria and Switzerland

Ralph Becker

ralph.becker@capgemini.com

North America

Bill Lewis

bill.a.lewis@capgemini.com

Sweden and Finland

Hakan Erander

hakan.erander@capgemini.com

The Netherlands

Arnoud Maas

arnoud.maas@capgemini.com

Asia

Julien Bourdinier

julien.bourdinier@capgemini.com



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