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South African Council of Shopping Centres



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MULTI-CHANNEL RETAILING **SOUTH AFRICA**

IS FAR BEHIND AND WILL HAVE TO CATCH UP

Dr Dirk A Prinsloo | July 2013



**Shop
online**



nurturing

south africa's retail network



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Online shopping reduces the need to always touch and feel, retailers have a mammoth task to create trust and comfort for online shoppers.

South Africa is currently five to seven years behind the UK, USA, Europe and Australia in terms of online shopping. This backlog will force online retailers and shopping centres to catch up with the rest of the world much quicker. The next three to five years will therefore be very hectic for retailers to develop the right products and infrastructure to offer world class online shopping as an additional retail outlet channel.

This will also lead to shopper education, new marketing concepts, the creation of trust and comfort of online security, reducing the need to always touch and feel products, as well as to streamline delivery services.

Online shopping is only the beginning of further social media development as well as the maximum utilisation of smartphones and tablets. Store and product apps will derive more marketing campaigns from these two devices than any other media in future.

Retail brands will have to embrace tablet marketing because influential customers will spend less time on PC's and print media. Pinterest will become a new photo and video clipboard for retailers. This type of social media offers many very useful opportunities for retailers and should be implemented as one of the new display windows for retail stores.

Click-and-collect is also a new concept which will have an impact on future store design and layout of retail stores. Will this facility overcome delivery problems and what will the impact be on store design?

The UK is one of the most advanced countries as far as online shopping is concerned with 14% of all retail sales already online. 25% of total UK retail sales are estimated to go to online channels by 2020 driven by m-commerce because of the high levels of smartphone penetration (BCSC, 2012:5).

There are three very important questions that must be answered through this market research:

- How should online shopping be implemented by retailers and especially shopping centres?
- What is the future impact of online shopping on floor space requirements, the design and layout of stores, the future role and function of a store as a showcase, a collection point, a warehouse or small showroom style retail outlet?
- What is the current amount spent on online retail products in South Africa and where will the market be in two to three years' time?

Multi-channel retailing is the merging of retail operations to enable the customer to transact via numerous channels. These channels include physical stores, online facilities, smartphones (mobile), telephone sales, mail orders, TV, social media and door-to-door sales. The essence of multi-channel retailing is that customers dictate the route they take to transact; multi-channel retailing equals true customer convenience (BCSC, 2012:12).

Multi-channel retailing is one of the most fundamental changes ever to have taken place in retailing. The impact of these changes is so drastic that some industry leaders are bold enough to state that "shopping as we knew it is dead" (BCSC, 2012:12).

Today's store front is a building of concrete, brick, glass and doors that customers visit to conduct sales transactions. The store of today is also an electronic browser and virtual showroom that support internet sales (e-commerce). It is also where social networks host social interaction, advertising, publishing, movies, finance, payment, entertainment, television and retail all bundled into one mobile device (The New Borderless Marketplace, 2012:5).



GROWTH IN ONLINE SALES

The UK is one of the leading online retailing countries in the world. In 2006 e-tailing represented 4.5% of sales. In 2012/13, 14.3% of sales are now online (BCSC, 2012: 13). After topping \$200 billion for the first time in 2012, it is expected that online retail sales in the US will reach \$327 billion by 2016. The overall share of the retail online market in the USA is also expected to increase from 7% to 9% during the same period.

More consumers are shopping online every day. 53% of the US population (167 million people) purchased online during 2011. Consumers are also purchasing a wide variety of product categories online. In 2001 mainly three of 30 retail categories were bought online, compared to eight in 2011 with an expected increase to 14 categories by 2016 (Lauren Indvik, <http://mashable.com>, 2012/02/27).

Online retail sales in Australia have risen to \$12.3 billion in the year ending October 2012, which takes online to 5.6% of total retail spending. Growth in Australian e-commerce is very positive at 26% year on year (Power Retail.com.au. Retail Sales, Oct 2012).



TABLE 1

Proportion of retail sales already online for selected countries 2012

COUNTRY	ONLINE SALES AS % OF TOTAL RETAIL SALES
UK	14.3
USA	8.0
Australia	5.6
Germany	10.0
France	9.0
Spain	4.1
Italy	1.6

Various sources used – See Reference List

In the light of all the above mentioned, the following facts are critical: Retailers that successfully fulfil the challenges of multi-channel retailing will help to ensure their survival, while those missing the challenge will likely face severe problems. There is no middle ground in the new commerce transaction or the distribution and retail industry.

How will South Africa catch up with the rest of the developed world? This report is the first to benchmark the current status of online shopping and to track the progress and changes for the next five years.

The research is based on the studying of various reports and websites to understand the impact and the challenges of multi-channel retailing. The latest trends will also be highlighted for South African retailers to follow.

In total 600 shoppers were interviewed at five super-regional and regional shopping centres in the four metropolitan areas. The focus was on shoppers in the LSM 6 - 10+ categories. Interviews were conducted during weekdays and weekends in April 2013. The main objective was to understand the online shopper and to distinguish them from shoppers not buying online.

TABLE 2

METROPOLITAN AREAS	NUMBER OF INTERVIEWS
Sandton	200
Johannesburg	100
Cape Town	100
Durban	100
Pretoria	100
TOTAL	600

The sample is not representative of the total population and must be seen as a “snapshot” at a particular point and time. There is however a very strong consistent reaction as far as the use of online shopping amongst the five different areas used in the survey, is concerned. The results also correspond very closely with studies undertaken earlier in the UK.

The reaction from 14 South African retailers already offering online facilities, as well as a number of retailers not online yet was very disappointing. None were prepared to share information at this early stage of development and implementation. This will hopefully improve in future benchmark studies. The latest press releases and annual reports were used to get some understanding of the state of online shopping amongst South African retailers.

An online mystery shopper survey was conducted to evaluate the different websites, the effectiveness of their deliveries and to evaluate the whole experience. This must be seen as a broad evaluation and will become a more detailed evaluation in future.

The last section of this report concentrates on new online ideas, marketing trends, the importance of Pinterest, experiential shopping and experiential marketing as well as recommendations to improve the online shopping experience in South Africa.

There has been very little formal research conducted in South Africa to measure the use of online shopping, the attitude of online shoppers versus non-online shoppers, as well as the

METHODOLOGY

possible impact of online shopping on shopping centres in future. No formal statistics exist regarding the volume of online sales, the different retail product categories bought online, future usage and how the market will change over the next three years.

The number of people with access to the internet is increasing and will definitely accelerate in future. This will have implications on the number of people using the internet to shop versus physically visiting shops in future. This survey amongst shoppers is the first to set a certain benchmark and to measure the increase in online shopping on an annual basis.

One of the biggest challenges for retailers and property owners in the near future is to get a much better understanding of online shopping and the impact on shopping centres, shopping





The research objectives were the following:

- To distinguish between users and non-users of online shopping;
- To focus on the users to identify the frequency of buying retail products online, money spend online and how online shopping is conducted;
- To identify the main reasons for online shopping and to identify the main disadvantages;
- To identify the support for retail stores already offering online shopping facilities;
- To indicate further needs and how online shopping can further be improved;
- To establish from non-online shoppers their reasons for not shopping online and future propensity to do so.

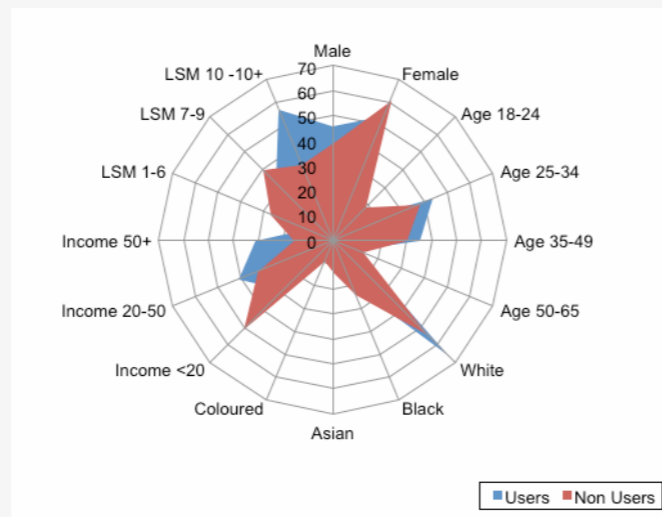
All this will be used as a benchmark for further research to highlight changes in online shopping over the next three years.

The highest proportion of online shoppers is in the age categories 25 – 34 years as well as 35 – 49 years. A large number of young people between 18 and 24 years have not yet started buying online. This could also be related to the fact that this age group does not yet generate any income.



There is a very strong correlation between income and shopping online. For individuals earning less than R20 000 per month, the proportion of online shoppers is much lower. There are a substantially higher proportion of online shoppers among people in the income categories above R20 000 per month. The highest proportion is in the category earning >R50 000 per month. The median income of online shoppers is R38 000 per month, while the median income for non-users is R22 000 per month. The LSM 10 and 10+ segments of the market clearly indicate a much higher propensity to do online shopping compared to all the lower LSM segments.

DIAGRAM 1 - DEMOGRAPHIC PROFILE: USERS VS NON-USERS OF ONLINE SHOPPING



In total, 42% of the respondents are online shoppers with slightly more male users, mainly in the age category 25 – 49 years, earning >R30 000 per month, and forming part of LSM 10 and 10+. This profile correlates with the findings in a recent survey in the UK. Their proportion of online shoppers at that stage was already at 52%. The group conducting online shopping in the UK are male shoppers, between 25 and 44 years with a higher income.

Source: Future of Retail Property: Online Retailing. The Impact of Click on Brick, 2006:35. British Council of Shopping Centres

The rest of the report is firstly divided into a detailed analysis of the online shoppers and secondly to give a good understanding of non-users.

42% of the online shoppers conduct online shopping at least once a month. A further 47% do research online and then buy in a store. Only 11% of this group can be regarded as heavy users with at least an online transaction every second week. This is already an indication of high adaptability and propensity to use.

The regular monthly users of online shopping will accelerate from the current 42% to levels of between 65% and 75% in the next two to three years.

GRAPH 1 - FREQUENCY OF BUYING ONLINE

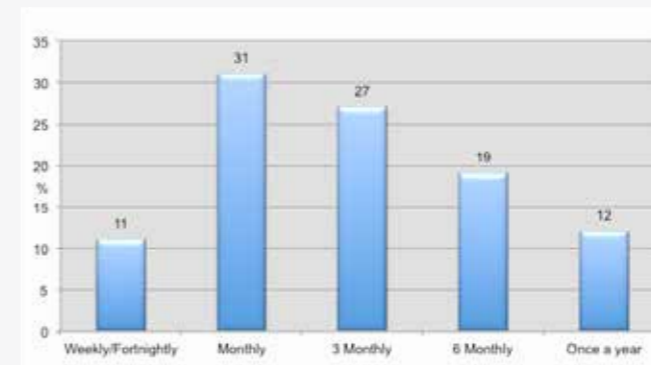
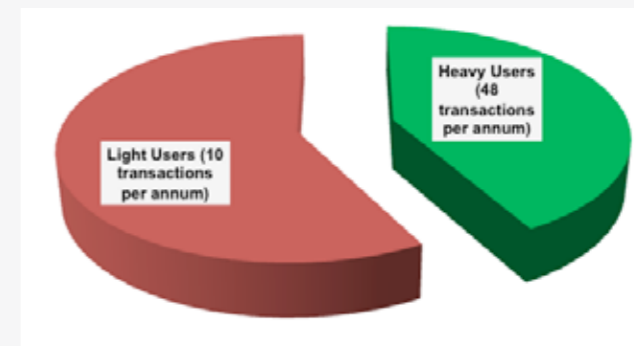


DIAGRAM 2 - AVERAGE NUMBER OF ONLINE TRANSACTIONS



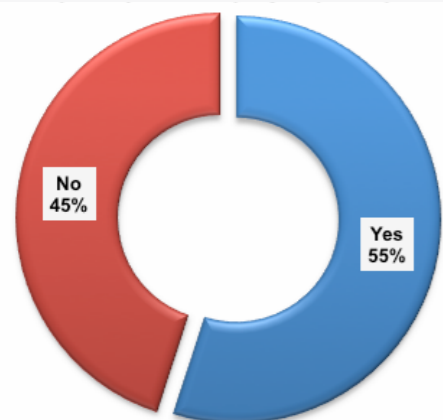
Heavy online shoppers already conduct on average 48 transactions per annum, while light users conduct on average 10 transactions per annum.

Currently four transactions are conducted by heavy users on a monthly basis, and ten transactions by light users on an annual basis. The average number of transactions is still very low. This is also a reflection of the availability of South African retail stores providing online shopping. All this clearly indicates that online shopping in South Africa is still in its infancy stage. However, the majority of existing online shoppers indicated that their number of online transactions has increased during the last three months. This already indicates how this could accelerate in future.

“All this clearly indicates that online shopping in South Africa is still in its infancy stage.”



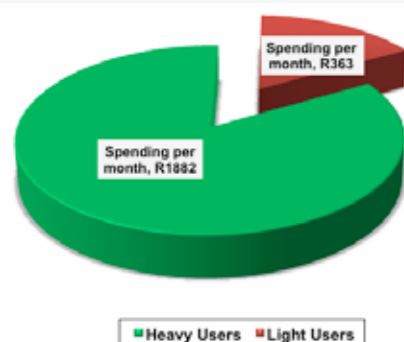
DIAGRAM 3 - INCREASE IN ONLINE TRANSACTIONS DURING THE LAST THREE MONTHS



Of online shoppers 55% have already increased their online transactions during the past three months.

Heavy online shoppers already spend on average R1 882 per month. The rest of the online shoppers spend ±R4 356 per annum on online shopping. This also confirms the difference between heavy and light users. The majority of the online shoppers also indicated that they expect to spend more on online products in future.

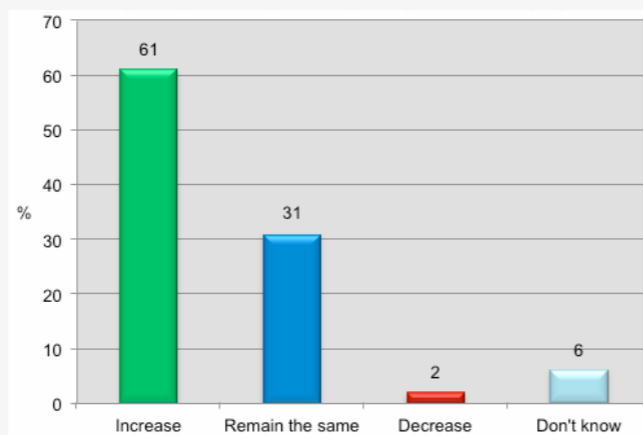
DIAGRAM 4 - AVERAGE SPENDING PER MONTH ON ONLINE TRANSACTIONS



Heavy users are already big online spenders while light users still spend less than R400 per month.

The heavy online shoppers are currently conducting four transactions per month. This has already increased during the last three months. On average R1 882 is spent on online shopping and this will also increase in future.

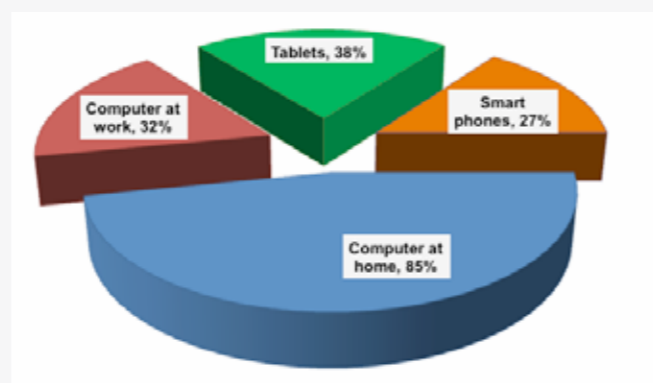
GRAPH 2 - INCREASE IN MONEY TO BE SPENT IN FUTURE



This gives an indication of the early adapters as well as the growth potential for this particular retail channel.

85% of the online shoppers make use of their computers at home, followed by tablets, computers at work and smartphones. It is also expected that the usage of smartphones and tablets will increase over the next three years.

DIAGRAM 5 - DEVICES USED FOR ONLINE SHOPPING



The most popular websites are still those well-known names selling online products and 65% of the online shoppers make use of these particular websites. 56% already support websites of specific stores. Shopping centre websites are used on much lower levels.

42% mentioned that Facebook also plays an important role in the decision making to buy specific products online.

The dominant reason for shopping online is the convenience and comfort of buying from home (49% mentioned this as the most important reason). 11% indicated that it is cheaper to buy online, 8% that it is faster, a wide variety of choices exists, and online shopping can be conducted worldwide. The same first five reasons for online shopping were also mentioned in the UK Study (Future of Retail Property: Online Retailing: The Impact of Click on Brick, British Council of Shopping Centres, 2006:35).

TABLE 3

MOST IMPORTANT REASONS FOR SHOPPING ONLINE	%
Convenient/comfort of my own home	49
Cheaper	11
Faster	8
Can shop worldwide	7
Wide variety of choices	7
Not restricted to business hours	5
Can compare products	4
Avoid shopping centres	3
Other	3
Free delivery	2
Can make price comparisons	1

One of the most important disadvantages of online shopping is the fact that you cannot touch or see the product. There are also concerns regarding the security and safety of credit card information. Some of the shoppers feel that there is no guarantee about the quality and there are problems associated with the delivery of online products. The return policies of the different stores are still unclear. The same four disadvantages of online shopping were mentioned in the UK Study (Future of Retail Property: Online Retailing: The Impact of Click on Brick, British Council of Shopping Centres, 2006:35).

TABLE 4

DISADVANTAGES OF SHOPPING ONLINE	%
Cannot touch or see product	25
Security of credit card	22
Slow delivery and non-delivery	13
Not certain about the quality of the product	13
Fear that the product cannot be changed/exchanged	10
Cost of delivery	5
Lack of human interaction	5
Right size not delivered	3
Other reasons	3
Prices not necessarily cheaper	1

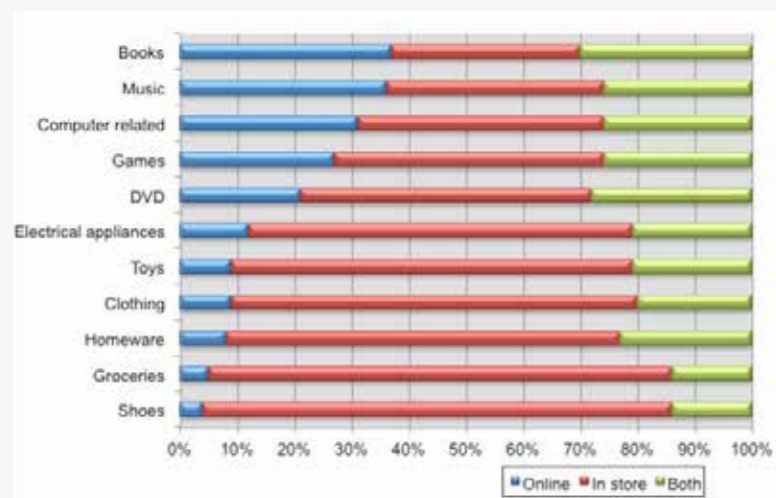


Shoppers feel that there is no guarantee about the quality and there are problems associated with the delivery of online products.



The most important products bought online are books, music, computer related items, games, DVDs and electrical appliances. In-store purchases are still the highest for electrical appliances, toys, clothing, homeware, groceries and shoes. There are already a number of shoppers combining online shopping with that of a physical visit to the store. Doing research online and then shopping in store is done by 47% of shoppers.

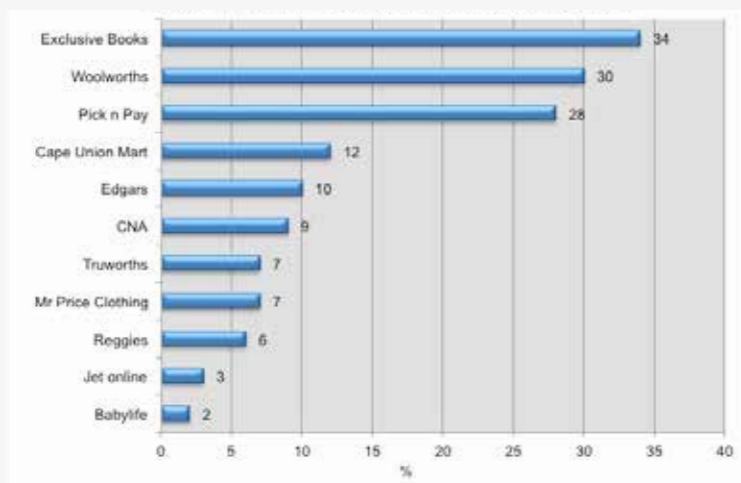
GRAPH 3 - PRODUCTS BOUGHT ONLINE



This buying behaviour clearly indicates that some products are still very low on the online shopping list. Growth opportunities are associated with clothing and shoes, homeware and groceries.

The online shoppers were asked to indicate whether certain retailer websites had been used. The highest support level currently is for Exclusive Books, Woolworths, Pick n Pay, Cape Union Mart, Edgars and CNA. Truworths, Mr Price Clothing, Reggies, Jet Online and BabyLife are still in the beginning phase.

GRAPH 4 - BOUGHT FROM THE FOLLOWING RETAIL WEBSITES



Click and collect is a new concept where products are bought online, and instead of being delivered, the products are collected in store, at a specific store, a central point or at a centralised warehouse. The majority of the online shoppers indicated that to click and collect, a trip must still be made to the store. 28% of the respondents were positive. It is also expected that once the online shoppers become aware of the advantages of click and collect, this method of online shopping will increase in popularity. In total 58% indicated that they will make use of click and collect in future.



The click and collect method is increasing in popularity

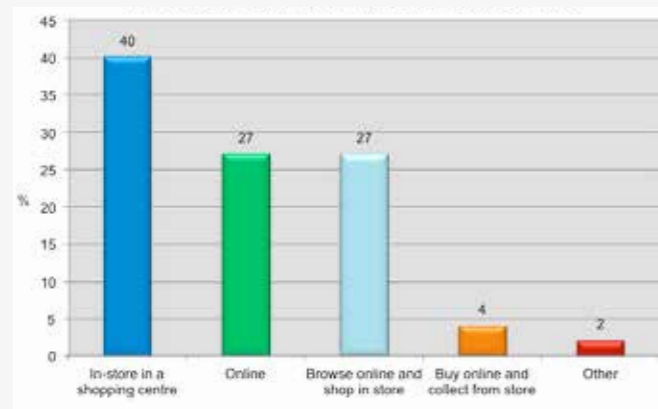


TABLE 5

IEWS ON CLICK AND COLLECT	%
I can just as well buy in store	35
It works well	18
Not convenient enough	15
Sounds like it could work	10
Takes too long before I can collect parcel	4
Card security could be a problem	4

All these online shoppers indicated that in-store shopping will still be their most preferred method of shopping in future (40%), while 27% indicated that online shopping is already their most preferred method of shopping. To browse online and shop in store is also an important future variation, with 27% of online shoppers preferring this approach.

GRAPH 5 - TYPE OF SHOPPING MOST PREFERRED IN FUTURE



At the moment, 73% of the products bought online are still delivered by courier to the home or work address of the shopper. Registered post is used by 12%, while delivery by the company is only at 8%.

Online shoppers were asked to indicate how online shopping could be improved in future. The majority asked for a better and wider variety of products, more retailers to offer online products, and to control credit card security.

The need was also expressed for better product description and displays on the websites, and 8% asked for more and updated reviews and comments by other buyers of the same product.



GRAPH 6 - RECOMMENDATIONS TO INCREASE FUTURE ONLINE SHOPPING

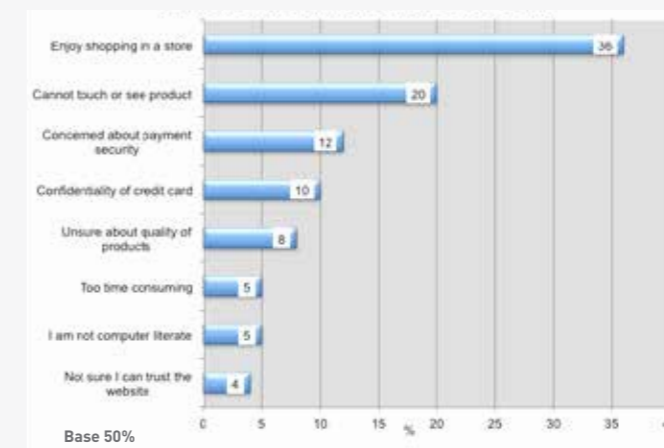


27% of these online shoppers are already dedicated to this new channel of retailing. The rest will still focus on a combination between online and in store shopping. The whole concept of click and collect is still new and should be further promoted and explained.

ALMOST 50% OF PEOPLE NOT SHOPPING ONLINE WILL SWITCH TO ONLINE SHOPPING IN FUTURE

58% of the total respondents indicated that they are not shopping online. The focus of this section is to understand this segment of the market as well as their propensity to become online shoppers. The main reasons why they are not online shoppers are because they enjoy shopping in-store, they still prefer to touch and see the product, they are also concerned about credit card security, and they are unsure of the quality of the products bought online. These findings once again correspond with findings in the UK. (Future of Retail Property: Online Retailing: The Impact of Click on Brick, British Council of Shopping Centres 2006:36).

GRAPH 7 - REASON WHY ONLINE SHOPPING IS NOT DONE

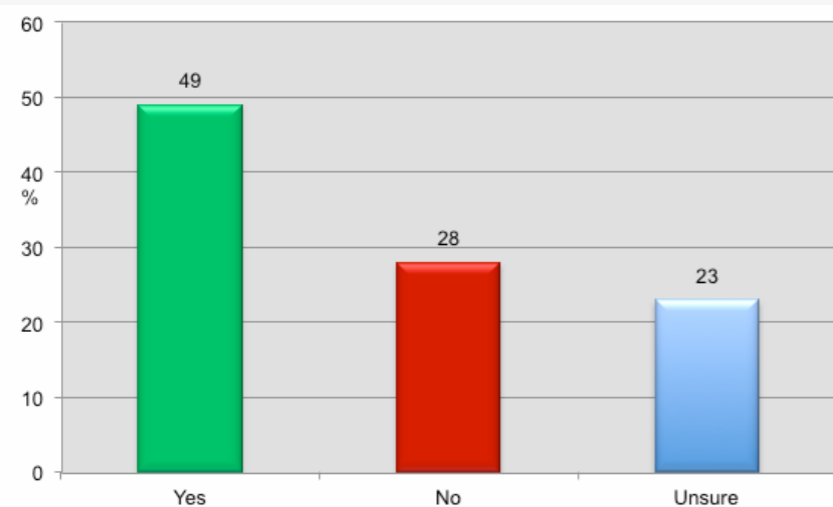




TOUCH AND FEEL IS STILL THE MOST IMPORTANT ASPECT THAT WILL DELAY ONLINE SHOPPING.

A large portion of this non-user group will however consider using online shopping facilities in future. 49% of the respondents were very positive in this regard, 28% indicated that they will never use online shopping, while a further 23% were undecided.

GRAPH 8 - USE OF ONLINE SHOPPING IN FUTURE



49% will consider using online shopping in future while 28% are convinced that they will never buy online.

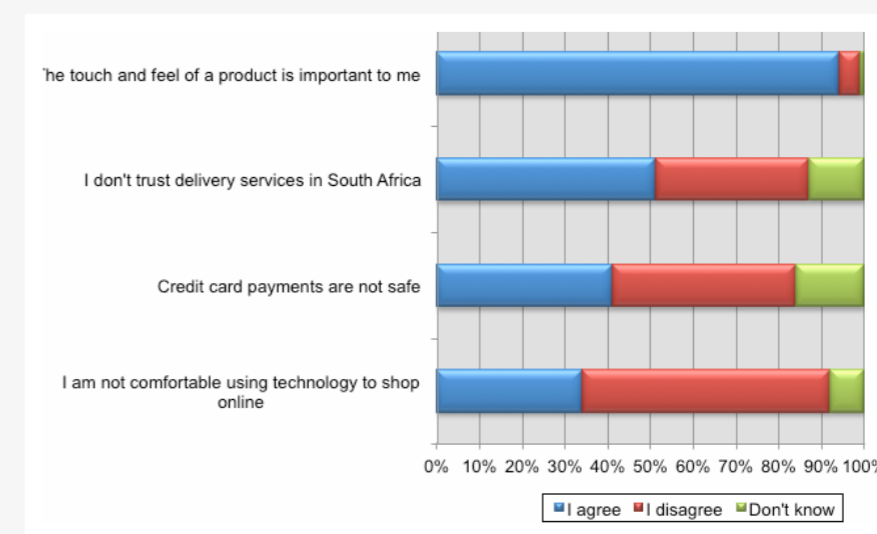
Most shoppers who do not buy online are already connected to social media. 77% are on Facebook, 33% on Twitter and 16% on LinkedIn. 18% of these shoppers indicated that social networks will definitely influence them to become online shoppers, while 23% indicated that this might be the case.

Of all respondents interviewed, 58% indicated that they will not be influenced by social media and will probably not become online shoppers.

Better product display online through various tools will help overcome this problem.

95% of all shoppers interviewed clearly indicated that the touch and feel of a product is still important and that they feel comfortable with new technology to shop online. They were also of the opinion that the delivery services in South Africa cannot be fully trusted. Fewer are concerned about credit card safety.

GRAPH 9 - NEGATIVE ASPECTS REGARDING ONLINE SHOPPING



These issues are amongst the most important drivers in implementing online shopping.

The survey indicated the following future trends:

- The 42% of respondents already conducting online shopping will increase in future;
- Of the 58% non-users, 50% will switch to become online shoppers;
- The focus in future will be on searching online and then shopping in store;
- 27% of the total market indicated that they will only use online shopping in future.

It is clear that the market is in a very strong growth phase and retail stores should focus on attracting customers back into the store through the click and collect concept, better advertising and the creation of experiential shopping.



The benefits on online shopping outweighs the disadvantages.



SOUTH AFRICAN ONLINE RETAILERS ARE ALL IMPROVING AND EXPANDING THEIR ONLINE FACILITIES.

Retailers not offering online shopping yet - better wake up soon.

There are mainly three large online retailer groups namely those operating worldwide like Amazon and eBay. South Africa already has a very strong growing group of online operators or stores like Kalahari, Zando, Oneshop, Takealot and Yuppiechef.

During 2012, Amazon had a turnover of \$61 billion. This represents an annual increase of 36% since 2009. Amazon offers over 30 different retail categories and already delivers everything from toothpaste to a television to your doorstep. They are currently planning a major expansion of AmazonFresh, the home delivery service of meat, dairy and other fresh foods. The strategy behind this is to give Amazon the opportunity to connect with customers on a more frequent basis and to offer ultimate convenience.

The latest trend in the US is where more retailers only trading online also recognising the value of physical stores in shopping centres. These stores are either pop-up stores or temporary spaces, while some are opening actual stores in shopping centres (Back to Bricks: More Online Retailers are recognising the Value of Physical Stores. Shopping Centres Today, April 2013:16).

Kalahari has established itself over the years. A number of new online stores are also flourishing, with new local players popping up every month in South Africa. Zando, an online

fashion store has exploded onto the local market. They offer free delivery for orders over R250 and have a full refund period of 14 days. Their main focus is attractive presentations, easy to use, good merchandise solutions, good stock control and reliable deliveries (Alistair Fairweather, Mail and Guardian, 22 Nov 2012).

Local online stores like Takealot.com offer a very wide range of products, but no clothing yet.

South African retailers already offering products online like Mr Price, are expanding their products worldwide and are adding more product brands to the local market (Beeld, 23 May 2013:26).

Edgars is also expanding their online shopping by adding Red Square to their offering a year after CNA was introduced to online shopping. They are planning to open a Boardmans online store and to expand the CNA online products (Beeld, 5 June 2013:24).

The strategy focus of Woolworths will be to enhance their website, to improve mobile compatibility, to move to nationwide delivery, and to introduce click and collect in store facilities (WHL, Strategic Focus, 2013:9).

In an evaluation of the existing retailer online facilities, the results range from average to very good. The most important aspects are reflected in the Table below:

TABLE 6

DIFFERENT ASPECTS	COMMENTS REGARDING ONLINE SHOPPING
Websites	<ul style="list-style-type: none"> • Easy to operate • Good layout • Takes long to open • Only for account holders • First have to sign in • Very easy to register • Difficult to order
Products	<ul style="list-style-type: none"> • Confusing product categories • Very poor product displays, look outdated • Limited variety of online products • Products offered online not available
Security	<ul style="list-style-type: none"> • Extra money went off credit card after purchase was made • Unsure of website security identification

TABLE 6 CONTINUED

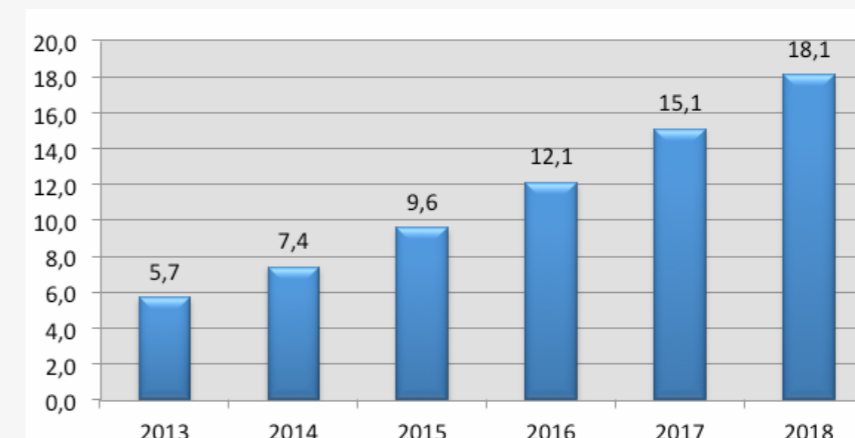
DIFFERENT ASPECTS	COMMENTS REGARDING ONLINE SHOPPING
Delivery	<ul style="list-style-type: none"> • Cost varies from free to R90 • Free deliveries for purchases >R250 • Delivery period ranges from next day to 15 days • Excellent delivery service for some stores
Return Policies	<ul style="list-style-type: none"> • You have to take it back to the closest store • Very easy and flexible • Return of product at own cost • Confusing in some cases
Prices	<ul style="list-style-type: none"> • Different to in-store price
Problems	<ul style="list-style-type: none"> • Standardisation of sizes. No measurements / indication of sizes (i.e. Europe, USA or UK) • Receive a lot of junk mail after the order was placed

The development of online shopping in South Africa is clearly in its infancy stages with some retailers much further advanced than many non-starters. The key aspects are the development of a very easy-to-use website, to offer the widest possible product range, to make sure that products offered online are available, to improve the photos and displays on the website, to have delivery and return policies in place, and to repeat the importance of website security identification. Retailers of online stores should realise the strength and the growing importance of non-retail online offerings. Those retailers not offering online shopping - better wake up soon.

WHAT IS THE MARKET POTENTIAL FOR ONLINE SHOPPING IN SOUTH AFRICA DURING THE NEXT FIVE YEARS?

Online shopping in South Africa is estimated at 0.8% of the total retail sales. This proportion is still small but already represents R6 billion per annum. It is expected that this volume will increase to over R18 billion by 2018 - 2020. The proportion of online shopping of the total retail sales will then increase to 2% - 3%. This is still well below the current 5% of online shopping as part of the total retail sales of Australia and the 14% of the UK.

GRAPH 10 - ONLINE RETAIL SPEND RAND (BILLION)





REFERENCE LIST

The growth in online retail sales will follow the same trend as in other countries and increase by an estimated 30% per annum during the initial growth phase. It is also expected that the market will offer many more opportunities and that the market profile of online shoppers will broaden over time. Customers will also start spending more on online shopping. The market might grow quicker than what is currently projected.

TABLE 7 - PROJECTED ONLINE SPEND AS % OF TOTAL RETAIL SPEND

YEAR	2013	2014	2015	2016	2017	2018
Online spend as % of total retail spend	0.82	1.03	1.26	1.50	1.78	2.04

WHAT SOUTH AFRICAN RETAILERS SHOULD FOCUS ON IN FUTURE

To offer multi-channel retailing in future will require very good planning. Online shopping will influence in store shopping and in store facilities will also have to promote online shopping. Multi-channel retailing will also require effective multi-channel marketing.

Brand consistency is critical across all the channels. Some retailers are displaying products online that are not in correspondence with their image and brand as experienced in store.

It is expected that online shopping in the UK will result in a large surplus supply in retail floor space because of the downsizing of stores. The emphasis in future will be on how the existing space is being utilised. South African retailers are however very far from this point where online shopping will impact on floor space.

Opportunities for online stores exist, once they have become successful and more in demand to start taking space in shopping centres. This will also happen in the distant future.

Experiential shopping and experiential marketing will have to ensure that customers are coming back to stores. Many retailers are already very successful in offering a brand experience.

It is also important not to overflow your online shopper with spam. Look for ways to add value in your e-commerce and website marketing campaigns.

As indicated in the customer survey, most of the non-online shoppers are already on Facebook. Plan your social media marketing to promote online and in store shopping. Social media gives your customers the ability to bond with your store or brand and to share their experiences with their friends. The social side of shopping will always remain very important. New social media concepts like Pinterest are ideal for retailers to offer an additional channel of retailing.

Desktop computers and tablets are very important as online devices. The future growth of online shopping will however depend more and more on the growth in smartphones. Amazon, Wikipedia and Facebook all agree that about 20% of their traffic is from smartphone-only users. In future, shoppers will turn more to store apps for products and information. If a retailer does not have a good store app they will not even be considered by customers during their purchase decision.

Store size and layout planning will also become very challenging in future. Is the store a warehouse, a showroom, a distribution centre or a place where the experience is the main draw card or is it primarily an online player with a bricks and mortar presence? Stores can also become 'brand pavilions' to showcase their products.

Multi-channel retailing is all about optimising connections, improving the experience and offering higher levels of convenience. There are major opportunities to develop multi-channel retail strategies. This is one of the most significant retail trends that will continue to have a great impact and positive outlook into the future.

- Beeld, 23 May 2013 and 5 June 2013.
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