Beyond every horizon, new horizons always rise  

(Michael Ende)

Given how things are, it may seem out of place to talk about retail innovations this year. Yet we think the subject is still worth discussing, albeit this time with a different outlook. The gamble that companies face today is increasingly tied to their ability to establish a two-pronged strategy: that is, to tackle the immediate situation with rapid and enlightened tactics, while not neglecting the strategic dimension of what lies further ahead, nor overlooking the signals that will guide us out of the present turmoil. When this “crisis” has blown over, the strategies adopted to overcome the difficulties will be decisive. Retail businesses will re-emerge strengthened only if they have managed to hold fast to their positioning, and have continued to demonstrate their willingness to invest in new ideas.

Innovation trends

- Socialtailing
- "I trust you"
- Pro-client efficiency
- Globalism
- Accessible dreams
- Greentailing
- Liquid retail
- Emerging retail territories

Cases

- Wal-Mart, super-ecostore
- Umbra, brand store
- Alice Delice, concept store
- Chronodrive.com, “click-to-store” concept
- Geologic Village, concept village format
- Fresh’n’Friends, convenience store
- KaDeWe, department store
- Real Future Store, hypermarket
- Toyon, DIY concept
- Dover Street Market, designer concept store
- Hotel Chocolat, chocolate shop concept
- Skin, skin care clinic
- Karoukh, RankQueens, “top ten” store
- Agenzia TU, banking agency
- KidZania, entertainment centre
- Desigual, brand store
- House of Bols, experiential brand store
- Selexyz Dominicanen, bookstore
- Meydan, shopping square
- Kohler, retail outlet+health spa
- Ridemakerz, workshop store
- Asos.com, e-tailer
- Elationsortial.com, e-tailer
- Threadless.com, multichannel retail community

Ebeltoft is a Retail Business Alliance, which was founded in 1990 in Ebeltoft, a little seaside village in Denmark. It is comprised of 16 firms that have a common, strong focus on the retail and service business, and provide consulting and a wide range of services to help retailers and suppliers in the retail sector remain competitive and achieve their goals. Ebeltoft members work worldwide both for many market leaders and for important or emerging local players.

The Ebeltoft Business Alliance has been studying trends and innovations in Retail since it was founded, and since 2005, has published a yearly report entitled Retail Innovations that focuses on emerging trends and the most interesting cases worldwide.

In 2009 Ebeltoft launched a new research program on the strategic issue of the “Trust Factor” into the Retail Brands. A survey was conducted in 11 countries with about 200 chains and more than 10,000 customer interviews to understand which companies are the Trust World Champions, how they achieved this leadership, and the key drivers to increase Trust and retain customers.

To get a copy of Retail Innovations 5 and/or for a presentation of the results of the “Trust Factor” survey, please contact your local member of Ebeltoft: www.ebeltofgroup.com
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Here we are once more with the 2009 report of international trends. As always, this publication is a handy overview of the in-depth reports that we make available to our clients to help orient them better in the complex situation under way and to seize the market opportunities more rapidly despite the current “crisis”. We prefer to put this kind of word in quotes, as a reminder that among the companies caught up in the “crisis”, there are some – as many of those we have analyzed below – that keep growing regardless. In the United States of America, nearly all of the 600 outlets of the second largest electronic retailer Circuit City are slated for closure, and 55% of its customers declared that they would defect to Best Buy.

Looking back at the twelve months that have just passed, we can see a year packed with events that affected and continue to affect our lives directly, along with the markets, individual countries, and indeed the entire world. Something that was hanging in the air for some time finally became a reality thanks to the domino effect of the global interconnectedness in which we live today at all levels.

If we were to halt the undeniable impact of the present recession at its current stage, there would not be much to worry about, given that crises are part of the economy’s life cycle. The challenge today is how to steer through this phase of uncertainty, and how to fathom just to what extent the “crisis” will envelop the economy. When will we come out of it? Even the most authoritative forecasts undergo increasingly sudden changes, usually for the worst. The result is widespread disorientation in the business world and among the public. What is needed are new tools for acquiring ones bearings in this evolving situation, but those tools are hard to find, and the occasional positive signal is not always received.

True enough, the present challenges have definitely endorsed a principle that is culturally new to us, namely that progress does not only entail quantitative growth. The “crisis” offers an opportunity to reassess our models – models of development, consumption, and lifestyle – and seek out new and more balanced solutions. We have the resources to get through this phase, and to avoid the present disorientation turning to fear or, worse, to panic. In a nutshell, we must “take advantage of this opportunity”, as Barack Obama declared, to re-establish a set of more transparent rules, more efficient

Research methods

- Analysis of national and international retail scenarios, pinpointing over 150 cases of innovative retail on the international market
- Definition of emerging trends
- Selection and analysis of 24 innovative cases that most typify each trend
- Analysis of the processes of transfer of possible innovations to individual markets
controls, and mechanisms to guarantee a more equal world. Given how things are, it may seem out of place to talk about retail innovations this year. Yet we think the subject is still worth discussing, albeit this time with a different outlook. The gamble that companies face today is increasingly tied to their ability to establish a two-pronged strategy that is, to tackle the immediate situation with rapid and enlightened tactics while not neglecting what lies further ahead, nor overlooking the signals that will guide us out of the present turmoil. When this “crisis” has blown over, the strategies adopted to overcome the difficulties will be decisive. The retail chains will re-emerge strengthened only if they have managed to hold fast to their positioning and have continued to demonstrate their willingness to invest in new ideas.

Our analysis of these scenarios and the signals that have emerged in the course of the year have revealed the following innovation trends. Some of these, such as socialetailing, have been identified for the first time in our monitor; others introduced in earlier reports have become more consolidated.

**Socialetailing.** The markets are starting to reveal a new mode of retailing that indicates a genuine orientation not only toward the consumer and client, but also toward the individual per se. This approach underpins what may be the most radical and successful innovation we have noted this year, exemplified by *Threadless*, in which the true protagonists are the members of the online community, who play a strategic and multiple role whereby fans, professionals or first-timers contribute new T-shirt designs for the site. Other players include “advisors” who provide opinions on others’ designs, where requested; a members’ voting system to award prizes for the most popular designs; a pre-order system for testing the feasibility of a design and to determine the right quantity to produce; and finally, those who actually purchase the designs online. The players are in turn rewarded when their design goes into production, first by the money from sales, and second when their name appears in the annals of Threadless. But, since this virtual population is not content with an online exchange alone, the idea came to provide an opportunity for members to meet each other and see the T-shirts and their designers in the flesh, hence the first physical store in Chicago, which has quickly become a venue where established designers and artists contribute to organized events. This way, entrepreneurs bring people together, foster group encounters, and promote events, while ensuring that the initiative continues with the same liveliness and transparency that characterized the project from the outset.

“I trust you.” Trust is an increasingly critical factor for the success of any project that involves innovation. Earning the customer’s confidence is a vital driving mechanism, which successful retailers have learned to keep focus on over the past decades. This can also be concluded from our Ebeltoft consumer research project about Trust in Retail Brands, which was presented this May at the World Retail Congress in Barcelona. The French chain retailer Decathlon, which now has outlets in 14 different countries, has grown its customer loyalty first by carefully building up a personnel composed of

sports enthusiasts. Alongside, it has meanwhile complemented its brand with sidelines such as the Trocathlon, a bazaar organized twice a year in which people can buy and sell used sports gear. This year we have pinpointed yet another creative gamble taken on by French giant Geologic Village, a wholly innovative concept that incorporates a store and a vast green “playground” that enables customers to try out the equipment and follow technicians as they test new products. They can go fishing with designers, and provide feedback on the prototypes and suggest new types of fishing rods, for example. In this way, the customer develops greater trust in the brand products, while the designer think-tank receives a steady flow of ideas and stimuli.

Trust is a decisive ingredient in the food industry too, and the organic products sector has provided an authoritative response toward safeguarding the health of the average customer, and not just those already involved in environmental concerns. Berlin’s Fresh‘N‘Friends has combined a tight policy on product selection with colourful and modern styling to create venues where people can socialize with fellow customers; the name itself references online social networks such as Facebook, and the place draws a clientele of predominantly young singles.

On Italian soil, areas that have shown strong innovative drives include the banking sector, where trust and reliability have become the key to success. Tuning into its clienteles needs is the UniCredit Group with its *Agenzia TU* project targeted to foreigners who live and work in Italy, a segment of the population that was hitherto overlooked despite their excellent potential. The groups new “friendly brand” format offers information in several languages, an open ambiance, and a more empathic approach through the presence of non-Italians among the staff, plus a closer rapport with the ethnic groups in the host city or even in the specific borough.

**Pro-client efficiency.** This trend was discussed in our previous yearly reports. Time is an ever-diminishing resource, and customers show notable appreciation for new concepts in streamlining shopping times and creating fluid procedures. To address the issue, a subsidiary of the Auchan Group has introduced a very compelling concept, *Chronodrive*, which combines online shopping with drive-in collection points where,
within a maximum of 3 minutes from when you place your order, an assistant loads it into your car without you even having to step out of the vehicle. This scheme neatly bypasses one of the enduring hurdles to online shopping for groceries, namely the personal delivery (trust and logistics) and pre-payment (distrust).

Glocalism. Lately, the impulse to merge modern with tradition has been generating a variety of fascinating new projects. Notable examples include the Selexyz bookstore in Maastricht, in which a bold modern installation has been deftly levered into a 14th-century deconsecrated church. Another example is the Desigual store in Barcelona, with its creative style and innovative collections, but also its clever way of evoking the feel of an outdoor market through the display systems, overtly referring to the Boqueria market on Las Ramblas. Similarly, the renowned Dutch distillers Bols, established in the 16th century, has launched a new concept that dovetails past and present by means of historical references, such as pictures by Rembrandt and original cash registers, set amid a high-tech environment that offers customers a multi-sensory interactive experience with the brand’s famous cocktails.

Accessible dreams. These days, what is perceived as “luxury”, and is perpetually changing, and the public’s aspirations – particularly among the younger generations – are strongly influenced by celebrities and public figures. The American retailer Eimittations has launched a line of accurately designed clothing and accessories at accessible prices, styled on what celebrities are wearing. Customers can browse the online catalogue by brand or type of product, but also by celebrity. Another way of making dreams accessible is through complete personalisation, a service offered by Ridemakerz, which enables kids and adults alike to customise model cars and build a unique exemplar of their own proud design. At a more traditional level comes the dream concept offered by Hotel Chocolat, whereby customers are introduced to the world of chocolate and can taste a huge variety of products, and they may even take an eco-tourist trip to the Caribbean and visit the company’s cocoa plantations to see the fair-trade policies at work for themselves.

Greentailing. One new complex issue is how the public’s buying patterns are influenced by a retailer’s perceived impact on the environment, how it handles its energy consumption, and whether it uses non-renewable resources. The adoption of “green” policies by retailers is discussed in depth in a new book by Neil Stern and Will Ander (two of E beto’s partners), but the conclusions are drawn to open interpretation. One strong signal has come from the retail giant Walmart, which is progressively investing in energy-saving plants, an approach that looks more like a marketing policy than a repositioning as a “green” retailer, as seen from the superstore opened in Brazil. Meanwhile, the Metro Group has just launched its new “outdoor” mall Meydan in Istanbul, which utilises geothermal energy as a means of addressing the public’s hopes for a shopping venue with greater liveability and respect for the environment.

Liquid retail. Since our observations in earlier reports, the question of flexibility in retail has been gaining momentum, by which greater choice in how to move around the store is offered to an increasingly “situationist” clientele. This year the most evolved example of this concept is represented by Future Store, which this time the Metro Group has developed as a hypermarket. Here, new technology is applied to give greater fluidity to the individual’s shopping experience, and allow for differentiated types of shopping—from the “speedy” type, to one that becomes interactive thanks to a wi-fi system by which the shopper can connect via his mobile phone, which can even be used to scan bar-codes and top up his shopping ready for self-checkout.

Emerging retail territories. From our study we note that the world of retailing continues to explore new concepts and formats. Koiher, a chain of DIY stores, has opened a new flagship store targeted at women, which includes a wellness area for relaxing trying out a range of special treatments, and the chance to test the equipment on sale in the store. In Great Britain, Sk:n has become the leading chain of beauty-care centres thanks to its well-gauged innovative retailing approach and an offering that integrates products with services, all presented in pleasant surroundings situated on a major pedestrian traffic route. KikZia, which started in Mexico and just reached Europe, is a highly successful edutainment venture, by which kids and youngsters learn about the adult world in an interactive child-size replica of a city, emulating an adult job, and taking their earnings to the bank, or going shopping. Dover Street Market in London has become a benchmark for the skill of mixing retail with art, building a strong and unique personality Retail concept, with “an ongoing atmosphere of beautiful chaos”.

Searching for new horizons in the storm. In 1876 American painter John Singer Sargent painted an intensely expressive seascape of a storm under way, which he managed to capture by venturing personally out into the ocean on a fishing vessel, rather than picturing it from his terrace at home. The painter had himself tied to the ship’s bridge so that he could commit the scene accurately to the canvas. This painting is an apt metaphor for what is currently taking place in the world of retail, and illustrates the importance of not merely looking on, but instead of taking courage and navigating through the situation, to discover that “beyond every horizon, new horizons always rise”. (M. Ende).
International Cases
Wal-Mart Ecostore

The new frontier of Wal-Mart’s drive to achieve eco-compatibility focuses on design choices that guarantee energy efficiency, economy, and speedy returns on investment outlay.

Although the first pro-environment campaigns of the American retailer Wal-Mart might have looked like a publicity stunt aimed at recouping favour they had lost through numerous contentious cases, now the “green” approach of the American retail colossus is more explicitly steered by the economic logic of energy efficiency and saving.

The creation of the giant’s 3,000th superstore abroad, in the district of São Paulo in Brazil, gave the company the chance to build a new environmentally-friendly prototype, with a design that has involved all aspects of the superstore, from the parking lots to the architecture, and even involved a change in product assortment, with the enlargement of their offering of whole-foods and other organic product lines. From the outside the superstore boldly announces its new bio-friendly approach with a thick overgrowth of greenery that shields part of the building from the sunlight, thereby lowering the temperature inside the building and cutting back on the costs of air-conditioning. Meanwhile, in the car-park the paving is all completed in porous concrete, which also uses recycled car-tires, to absorb the heat better and avoid the overflow of water. Wal-Mart has also envisaged a green enclave around the complex and kept most of the trees present on the site, adding another 170 examples of local species of tree.

To compensate for the trees cut to clear the site, an equal number of trees were planted in a protected site elsewhere. The enormous façade of reflecting glass, besides the aesthetic impact, is a source of energy saving because in part the glass reflects the heat of the sun, thereby reducing...

Key data
- Format: super-ecostore
- Launched: 2007
- 6,000 sq.m
- 17% energy saving
- 12% water saving
Key points of innovation
- Integrated and coherent project
- Reduction of energy consumption
- Water collection and recycling
- Functional and aesthetic use of “green” philosophy
- Innovative solutions for the parking lot and building architecture
A leading retailer of accessible and exclusive design dreams up a space that offers an interactive and stimulating shopping experience, and becomes a new landmark in the Toronto cityscape.

Created in 1970, Umbra is a brand of designer objects and interior accessories that has gained a reputation for its exclusive selection and the design of its product range. The company’s success is attested by its diffusion across some 75 countries worldwide and turnover of 160 million dollars. The company’s latest strategic watershed came in 2007 with the launch of a mono-brand store in Toronto’s upmarket fashion quarter. The over 600 square metres of the Umbra concept store, designed by the architects studio Khon Shiner, stands out markedly from its surroundings. With its unusual glowing ambience of transparent pink panels, the store has rapidly become one of the city’s new architectural landmarks.

The interior design follows a set of refined minimalist criteria to give ascendancy to the characteristic, brightly coloured Umbra products. As pointed out by the chairman and co-founder, Les Mandelbaum, the “company’s design philosophy is illustrated through the exterior and interior of the store,” which “breathes innovative, inspiring, and functional design.” The assortment spans from the complete Umbra line of household objects to kitchen gadgets, furniture, furnishing accessories, window decorations, and sundry cult products. The offering in each category is continually updated – with a renewal of no less than 400 new items from

**Key data**
- Format: brand store
- Launched: 2007
- 650 sqm on two levels
- 6 employees
- 1,500 products

CANADA - Toronto
a total of 1,500 – and boasts an excellent price-quality rapport that makes design “democratic” and affordable. An increasing quota of shelving space is given over to eco-friendly items made from recycled materials and with low environmental impact. There is also an exclusive high-end range, entitled U+Studio Collection, which includes limited-edition works of art, such as the Strass Stool by Michelle Ivankovic; and the Umbra Garbino, a tulip-shaped basket that became a cult-object and is now on permanent exhibition in the MoMA in New York.

According to the founding members, the assortment at the sales outlet reveals a “sense of humility, a sense of art, a sense of fun. It’s not overly serious stuff.” The target group includes people attracted by design, the younger crowd, and people who love modern and contemporary style, along with designers and interior designers. The store allows for interaction at various levels: numerous design books are made available to anyone with a mind to explore the history of design up until the very latest innovations; alternatively visitors can browse original sketches of noted designers posted up on the wall, or admire rendered 3-D diagrams displayed on the numerous computers ranged through the store. Visitors may also drop by the Design’s Corner and watch

and interact with members of the Umbra team developing their ideas. Meanwhile, special space upstairs is set aside as an “open concept” lounge that hosts the launch of new products, along with various events, seminars, and exhibitions.

Thanks to its exclusive product policy, and its educational and dynamic outlook, Umbra Concept Store received the Design of the Year accolade in September 2007, awarded by the Association of Registered Interior Designers of Ontario (ARIDO).

**Key points of innovation**

- Cult store
- Accessible designs and exclusive lines
- Constant updating of wide assortment
- Interactive engagement with customers
Alice Délice is a small store completely devoted to the kitchen as a place for the preparation and enjoyment of food. With the financial backing of the Auchan Group, the first outlet was opened at the end of the 2002 in Lille by a manager who had migrated from Decathlon and developed the idea after travelling extensively through Japan and the United States. The range offered by Alice Délice includes only original quality products, and covers various food-related categories, including kitchen utensils, accessories, recipe books, and delicatessen produce. Furthermore, the shopping experience is enhanced throughout a busy calendar of events and by the particularly well-gauged, stimulating environment offered by the store.

The seduction starts right from the entrance, with its blackboard announcing the calendar of events held in the store. Once inside, the customer is greeted by a bright and colourful decor; a lively product range, intelligent packaging, and appealing installation. The message is made clear via series of outsize graffiti on the walls, reading “taste, smell, touch, discover, share”. It is no wonder that the centre of the store is dominated by a fully working kitchen where each day a special “rendez-vous avec Alice” is staged, in which cooks prepare several recipes in full view of the customers.

Some of the outlets hold regular seminars for groups of between 8 and 12 applicants. The visual identity of the store is of outstanding quality, and has been designed with utmost precision for all details, including the colour scheme, visual

**Key data**
- Format: concept store
- Launched: 2002
- 9 stores
- 2008: first franchise outlet in Brussels
- 200/300 sqm
- 2,000/3,000 SKU
- 7 employees per store
Alice Délice - France

Key points of innovation
- Concept applied coherently at all levels
- High level of interaction with customers of all ages (courses, demos…)
- Innovative assortment of ideas and good focus on new trends
- Original and welcoming environment

Merchandising, displays, in-store communication, fixtures and fittings, materials, and lighting. The careful use of the brand ID factors establishes a harmonious, welcoming environment that stimulates the visitor to explore.

The store’s offer is divided into four sectors:

Kitchen utensils and equipment. A broad range of manageable kitchen accessories and cooking utensils, along with kitchen robots, pots and saucepans, all made by the top brands. In addition, a series of video demonstrations provide an uninterrupted visual guide of how to use products.

Delicatessen. An ample selection of specialist foodstuffs, such as herbs and spices, pasta, preserves, syrups, sweets, chocolate, oil and vinegar, coffee and tea. Also available are gift packets containing a selection of products.

Accessories. Chef’s aprons, oven mitts, etc., containers for storing utensils and conserving food, kitchen decoration, trash separation units and articles for washing dishes. Lots of bright ideas and tools to make work in the kitchen easier and more fun.

Bookstore. Over 500 titles ranging from traditional French cuisine to how-to recipes for Thai cooking, plus a section of more specific guides, such as “Expert guide to making plum jam” or “How to organise and improvise a picnic”.

The range of special services provided includes home-deliver, wedding-lists, and special orders.

The store’s special focus on children includes a kids’ corner with a range of books and products especially selected for them, and a space in which they can try their hand as chefs and learn to cook pastries and pies, pasta dishes, or just experiment as they please with flavours and colours.
Chronodrive is the first concept store in France that mixes online shopping with the classic drive-in for goods collection, and aims to cut out some of the main hurdles that have so far deterred people from buying their groceries online, mainly caused by: privacy concerns; inflexible, intrusive and costly delivery service; and customers’ distrust in online payment. Other retailers, as Auchan (Auchandrive) and Leclerc (Express Drive), are testing the same kind of concept but most of them on a hypermarket’s parking which seems less relevant for client. Launched by the Association Familiale Mulliez retail group in the town of Lille in 2004, Auchan’s home region (also owned by the same Association), the store addresses the needs of a growing bracket of people who choose to keep their grocery shopping simple, swift, and flexible. From the first outlet that was opened, Chronodrive chose locations at important trunk road crossings to exploit the steady flow of commuter traffic. Store locations also show preference for residential areas with families of middle-to-high income, and logically with an above average quota of families with an Internet connection.

Shopping with Chronodrive is very simple. The website is like any classic online store, with product icons to click on and save to the “shopping basket”. Over 7,000 products are listed, mostly food products, both fresh and packaged, subdivided into 25 sections, including discount lines, new products, and special offers. The assortment comprises the value prices, private brands, national brands, and typical regional products; the prices average higher than those of a hypermarket, but are

**Key data**
- Format: “click-to-store” concept
- Launched: 2004
- 9 outlets (2008)
- 300 workforce
- 1,500 sqm: warehouse
- 4,000 sqm: parking and loading area
- 7,000 SKU
- 2’30” average waiting time to receive shopping
Key points of innovation

- Convenience concept store that facilitates online shopping
- Smooth and efficient processing of orders, swift and simple
- User-friendly website full of handy shortcuts
- Guaranteed flexibility of timing and payment
- Chance to purchase certain goods directly from the drive-in kiosk

Shopping of over 450 items – especially if heavy or cumbersome – can be ordered directly from the interactive kiosk in the car-park.

lower than the standard supermarket. Orders start from 1 euro and are paid online; those who do not trust the secure servers can pay upon collection directly from the interactive kiosks or at the service desk. The site is user-friendly and offers numerous quick-step procedures to reduce time, such as consulting a preference list of the 80 most frequently ordered items, or simply recalling the previous order. To whet the customer’s appetite there are also recipe suggestions, with a complete list of ingredients that can be dropped into the shopping cart in one go.

The shopping is ready within two hours after confirming the order, and remains available for the ensuing 24 hours. When the customer wants to collect his shopping, he simply enters the drive-in, parks beside one of the interactive kiosks, and types in his client code into the keypad, which is designed ergonomically so as to avoid contortions. Having done this, the customer drives to a numbered parking space in the receiving area and within five minutes a worker arrives with the goods and loads them into the boot of the car. To provide maximum flexibility, customers can add last-minute items to the list, right up until collection time.
Geologic Village
Decathlon

A unique concept developed by Decathlon for fans of hunting and fishing: a megastore with vast in-store areas plus outdoor areas for practising sports, and a department for developing brand products to be designed in tandem with those practising sports.

Decathlon has chosen Bordeaux as the site of the new “Geologic Village” concept store specialised in the world of hunting and fishing. This region of France boasts the highest number of hunters and anglers, owing to its highly varied natural environment, which combines the ocean with numerous lakes and woodlands, and not least the passage of migrating birds.

An estimated 3.5 million people in France are devoted to hunting and angling, but the market of products and equipment for these sports is still largely dominated by brand products sold in small specialist outlets. The challenge that Decathlon took on, involves the difficult task of convincing customers that the products manufactured under its own label are equally valid, or even an improvement, in as much as they are designed in close collaboration with people who practise these sports.

The peculiarity of the Geologic Village is that it is indeed a specialist village with hunting and fishing facilities as well as archery, alongside a megastore of 3,500 sq.m, a company headquarters, and a vast park in which customers can try out the products. Thanks to this integration of functions, the 55 product managers working on-site can study.

Key data

- Format: concept village format
- Launched: 2008
- Surface
  - 3,500 sqm: sales area
  - 2,500 sqm: workshop
  - 18 hectares of natural park
- 3 categories: hunting, fishing, and archery
- 100% private brands
- 65 employees
The customers as they practise the sports and evaluate their needs and wishes, in order to design together new products that address their expectations. The Geologic Village offers its own engineers the chance to test out the new products immediately in the prototype stage, in real conditions of use, and enables the store managers to experiment with furniture, displays, and merchandising, before replicating these throughout all the other sales outlets. Both outside and inside the store the customers find numerous areas where they can follow demonstrations of the products, or try them out directly themselves.

There is a pond of one and a half hectares populated with various species of fish for anglers to try out fishing-rods, reels, and tackle. For testing shotguns one can shoot at fake boars or clay-pigeons, while archers have their own standard target area. Inside the store there is a pool 10 metres long where anglers can try out types of bait and all kinds of fishing gear, such as chest-high waders. There is even an extreme climate simulator to test out the resistance of special high-tech gear. Thanks to all these unusual features, the Village has a similar atmosphere to a fun-park, and consequently attracts a diverse range of people.

The mission of this flagship store goes far beyond its principal mission to endorse the Decathlon corporate image and boost sales, which only compensates in part for the heavy outlay.

The main goal of the Village’s strategy is to consolidate Decathlon’s customer-oriented corporate culture by designing products alongside the end-users, thereby reinforcing the Decathlon label’s unique and distinctive lead over its competitors.

Key points of innovation
- Concept involving the integration of experience-sales-workshop
- Contact with clients “in action” as co-designers of new products
- Concrete development of a customer-oriented corporate culture
- A stimulating, fun-filled atmosphere
- A solid boost to Decathlon’s overall corporate image
Fresh ‘N’ Friends

An organic food-store open 24/7 and all year round targeted at a broad swathe of Berlin’s public. It features convenience and organic-only products sold in a modern environment that takes its cues from the digital community.

The Fresh ‘N’ Friends environment instead boasts modern styling with a fresh, bright colour scheme of pink and green, and is fitted with steel fixtures rather than the usual wooden shelving. The company logo itself proclaims its orientation with the kind of visual cues found on FaceBook and the like, attracting younger shoppers and anyone interested in eating healthily, while also tapping into new trends and uses of technology.

The product positioning is particularly valid for a city like Berlin, with its singular vocation as an incubator and crossroads of cutting-edge trends at both social and cultural levels. Moreover, the chain’s founder Anton Kerfer located each store after carefully examining the available demographic data for each area. The store in Prenzlauer Berg, for example, lies in a neighbourhood with a high density of young adults, in which 51.8% of the residents are between 25 and 45 years old, against the average 31.9% for Berlin, and 28.5% for Germany as a whole. Given the unconventional lifestyle and shopping patterns of the target group, Fresh ‘N’ Friends has opted to remain open around the clock, 365 days a year, marking a drastic change to the opening hours that German retailers generally offer. Moreover, given that a high quota of residents in the areas chosen by

Key data
- Format: convenience store
- Launch: 2007
- 4 outlets in Berlin
- 80–150 sqm
- 100% organic SKU

RESH’N’FRIENDS is a new chain of small convenience food-stores specialising in organic products whose style differs greatly from the classic wholefood outlet we are accustomed to, which usually convey a kind of “alternative”, post-hippie identity.
FreshN'Friends are single, the chain has tailored its range of products to address this target and to deal with the growing trends in non-traditional eating patterns. Hence a large section of the premises is appointed for single-portion packages for both groceries and ready meals – including sushi, pasta, soups, sandwiches – to take home or be heated up for consumption sitting at tables placed outside the store.

The assortment is plentiful and includes the occasional high-end product such as champagne and non-food categories for body-care, so as to cater to one-stop shopping needs as far as possible. FreshN'Friends offers an interesting example of differentiation based not on the assortment itself – which does not differ much from the offering found in most small health-food stores – but on the uncomplicated positioning of merchandise without any ideological undertone, a formula that has proved very successful with this growing “elective” stratum of consumers who often felt alienated by the “back to nature” hype of traditional wholefood stores.

The philosophy of the chain is straightforward: to make organic food modern and accessible, along with its respect for the environment and policy of sourcing foods locally.

**Key points of innovation**
- Modern positioning of organic foods
- All-round 24/7 convenience
- Target focus on small market niches
- Wide assortment that includes non-food goods
A new metropolitan concept for revitalising established department stores: outstanding architecture, modern interior design, and a mix of high-quality brands.

Karstadt AG is a German chain retailer that commands 92 department stores across the country, together with 28 specialist Karstadt Sport outlets. In 2008 the company opened a new concept department store in the city of Essen aimed at addressing the evolving needs of its clientele.

For some 100 years the city’s central Limbecker Platz has been one of the most popular shopping venues in Germany. In a bid to bring the cosmopolitan style to the capital of the Ruhr district, Germany’s leading contractors for shopping malls tendered a radical proposal that was accepted by the local authorities for revitalising Essen’s historic downtown.

The pre-existing commercial buildings were demolished and the lot cleared to make way for the new complex, which provides 20,000 square metres of floorspace for the new Karstadt store distributed over four storeys, plus another 4,000 for the Karstadt-Sport outlet, while the remaining spaces is shared out among numerous leading brands of clothing, body-care products, bookshops, and so forth. For the outside of the building, the architect Gunter Henn took inspiration for his design from Marilyn Monroe’s famous swirling dress to create a...
Karstadt AG sees Limbecker Platz as a kind of workshop to try out future marketing strategies in more upmarket lines of product positioning, and is planning to insert leading brands like Hugo Boss among its assortment.

The assortment focuses on clothing and accessories: a broad selection of 130 German and international brands cover a variety of price-ranges and different styles, displayed in classical shop-in-shop situations. Completing the product offering are eight own-brands by Karstadt itself, which range from classical to trendy and are endorsed by such top models as Eva Padberg. The setting of this vast central department store offers Karstadt an excellent complement of mixed shopping that features various facilities such as relaxation areas, a varied food court, along with a tourist information centre and a calendar of events such as performances, concerts, and fashion shows held in designated areas within the complex. Families are also catered for with a crèche run by qualified assistants, strollers for hire, and kids’ shows. Meanwhile screens in the floor and on the walls relay news of events in the centre and job opportunities on site. The completion date for the centre is Autumn 2009, and when finished will cover an area of 70,000 square metres, becoming the largest downtown shopping mall in Germany, with a flow of up to 50,000 visitors per day.

Key points of innovation
- Striking architectural setting
- Wide-ranging choice of merchandise
- Excellent quality-price ratio
- Integration within Germany’s largest downtown shopping mall
- Family marketing

The stylist and seductive atmosphere allows for a sophisticated presentation of the products, underscored by the use of quality materials and finishes, such as the floors in fine parquet and granite.

The new eye-catching landmark amid the urban context of the square. Inside, the new Karstadt boasts a clean linear design and bright and airy spaces, elements that are matched by the creative display apparatus and the visual merchandising.
The Metro Group continues its journey into the future, this time with a hypermarket, opened in May 2008, that utilizes cutting-edge technology to address the needs of its customers, offer greater comfort, and easy access to information.

Five years after the opening of the first Future Store (the Extra supermarket analyzed in our first Retail Innovations report), the German group Metro has now devise a second updated version of “the store of the future”, this time using the hypermarket format, designed in collaboration with the Gruppe Nymphenburg, a member of Ebeltoft. The main aim of the design is to make shopping ever more straightforward, eventful and informative and able to address the huge range of needs and expectations of the customer. The layout is divided into three sections: one geared to providing a simple, practical, and speedy service; the second providing a multi-sensory and interactive experience; and the third offering information that is easy to access and is focused on consumer needs.

The numerous technological innovations introduced here begin straightaway at the entrance: a notice suggests customers entering to activate their Bluetooth devices so as to receive tips on special deals, or download a ringtone designed especially by the hypermarket. While shopping, customers can take advantage of the MSA or Mobile Shopping Assistant, a sort of mobile phone device which reads barcodes and provides information on the product, the subtotal, the savings from special offers, the physical location of product categories in the store, etc. Special attention is also given to the fresh-food area, which has a large counter for tasting products, and also an internet café. The fish department boasts a system for simulating a Mediterranean environment with the scent of Provencal herbs with lemon and the sound of waves in the background. Similarly, the meat counter is different from the typical...
Key points of innovation

- Layout by area: Convenience, Experience, Information
- Technology for the service of the customer
- Multi-sensory experience
- Cutting-edge tools and applications: MSA, RFID, speaking robots
- Flexibility of checkout and payment methods

German butcher’s, with its emphasis on full display of produce and extensive use of the RFID reader at the Smart Freezer, stating the quality assurance of each packed fresh meat article and providing real-time inventory of purchases. To address the quest for convenience there is a special menu-for-two at euro 6.99, by which customers can mix and choose between meats, side-dishes, vegetables and sauces. In the beauty and body-care department the approach is based on “self-service consultancy” with special interactive systems that supply information on cosmetic products and provide a photographic rendering of the outcome of different make-up solutions. The wines & spirits section offers no less than 650 different products, plus special services such as a tasting counter, and a device for cooling bottles to the desired temperature. The usual set of facilities – such as the multimedia column for listening to CDs or watch videos, and the kiosk providing fitness tips and local events – are complemented by high-tech gadgets like the speaking robots that interact with customers, and the cylindrical 360º digital display. The route through the store is highly flexible, and no fewer than four different modes of payment are allows, from the traditional cash-desk, to a self-checkout, and self-scanning of goods with an MSA, and even with a fingerprint payment solution.
Toom BauMarkt is one of Germany’s leading DIY and gardening chain-stores, and now has nearly 400 outlets across the country.

In 2006, the company launched a new concept store that quickly garnered various prestigious accolades. It was devised to target areas of the buying public that have hitherto been overlooked, namely, women and people with no prior experience in home improvement. A market research project revealed that of the 23 million Germans DIY-amateurs, only 5.7% were “doing their own thing” so to speak, and these were mostly males following a traditional approach to DIY shopping. The rest of the clientele has a different objective, as their purchases are family-oriented or they are looking for inspiration for some home-decoration.

Many of these customers go to the DIY store only occasionally, and usually with a precise idea of what they intend to buy. This very practical approach leaves little leeway for imagination and inspiration, making it hard to prompt the shopper to buy on impulse. So the German company launched a new scheme aimed directly at this target group, and adjusted its retail practices to take advantage of the new potential. After a period of analysis and trial-runs, the company started the new Toom concept store Bad Säckingen, which announces its intentions to surprise the visitor with a gigantic “Wow!” emblazoned on the façade.

One of the chief innovations is how products are arranged. The layout offers 13 “theme

Key data
- Format: DIY concept
- 6,000 sqm average
- Launch of new concept: 2006
- 13 separate thematic areas
- About 50 outlets with the new format
- 385 outlets belonging to the chain
Key points of innovation

- Focus on emerging target groups (women, and DIY beginners)
- Covers the purchase of the products to the mix of solutions and inspiration
- Broad and far-reaching portfolio of specialist services
- Display of products by theme, but also across categories

The store nevertheless does not overlook the classic DIY customers who do their own thing, and therefore includes a route for more traditional purchases, though such customers are prompted to find out ways of making better use of what the store offers, starting with the campaigns set up near the entrance. The keen balance achieved between drawing in an entirely new bracket of customer while catering for the traditional clientele has ensured the new format’s success and its replication in about 50 venues.
Dover Street Market

A contemporary market that continues to be recognised as one of the coolest places to shop in London, with its fluid spaces, mixture of brands and clothes with a strong identity, and crossover between culture and art.

On their website, Rei Kawakudo gives this description of DSM: “I want to create a kind of market where various creators from various fields gather together and encounter each other in an ongoing atmosphere of beautiful chaos; the mixing up and coming together of different kindred souls who all share a strong personal vision.”

Given the present era in which fashion labels employ guerrilla marketing tactics and temporary stores to take their customers by storm, Kawakudo decided instead to create an imaginative, fluid retail venue in which the garments are arranged on displays devised like stalls in a street-market. The range includes various luxury labels, however, such as Lanvin, Nina Ricci, Azzedine Alaia, and Givenchy, alongside the offering of younger designers like Hussein Chalayan, Christopher Kane, Giles Deacon, and not least the work of lesser-known newcomers. Each brand is chosen according to its personality and its ability to “express something with meaning”.

Some areas are assigned to the temporary presentation

Key data
- Format: designer concept store
- Launched: 2004 in London
- Launched: 2006 in Tokyo
- 1,200 sqm
- 6 floors
Key points of innovation

- A unique and distinctive identity
- A “fluid” retail area in constant evolution
- Range guided by the idea of “fertile chaos”
- Selection and inclusion of new fashion talents
- A strong media attraction
In 1993, Angus Thirlwell and Peter Harris set up a company with the intention of offering the British public chocolate that would stand out from all the other types present on the market. From the outset, the aim of Choc Express was to dovetail cultivation with production, alongside a streamlined logistic network with direct sales, which at first was only developed through a product catalogue. In 2003, Choc Express was repositioned by placing more emphasis on rapid delivery, and by playing on the exotic and sensual connotations of chocolate.

The upshot was the launch of the Hotel Chocolat outlets. The concept behind the new venture was to evoke a genuine chocolate “sanctuary”, and the setup had the advantage of the vertical integration of its operations from plant to store, starting with the 140 hectares of cocoa plantation on the island of Saint Lucia in the Antilles and the farm business that processes the cocoa seeds. In this way, for the first time a retailer could show its customers the very places in which the chocolate they eat is actually grown and processed, and the methods used for achieving the final product.

In each of the outlets the “chocolate experience” is explored through pictures illustrating the myriad pleasures of chocolate and the exotic places where the prized cocoa beans are grown and processed, involving customers in the tale of how the company came into being. The style of the stores’ fittings and lighting is more typical of a luxury jeweller than a food-store, which is fully in keeping with the product.

**Key data**
- Format: chocolate-shop concept
- First outlet opened in 2003
- 2007 online sales began in USA
- 33 outlets
- 80 sqm average
- 30 seats in café
- 200 products
- 6–7 staff per store
- £950 for membership to chocolate-tasting club
- 2008: ranked emerging store in Retail Week

Hotel Chocolat

The multi-sensory experience of chocolate: from production to retail, a wealth of services, including eco-tourist trips to the cocoa plantations and factories in the Antilles.
positioning and the multi-sensory experience offered by the Hotel Chocolat brand. Like the décor, customer service is also attentively gauged with special formulas, such as the Concierge gift-selection presented in an elegant carrier that offers umpteen different combinations for personalising the gift (from the types of product, to the way they are packed, to the message written on the packaging). Alternatively, the Bespoke selection allows firms to customise their chocolate boxes with their own logo. The Hotel Chocolat brand's renown for its customer care has opened up new opportunities for broadening the offering, with new entries, such as nutrition and energy-boosting lines that have less sugar and a higher content of pure cacao. Forthcoming developments include building a processing centre next to the plantation, and use a local workforce and raw materials, such as sugar and milk, thereby keeping all these assets closely linked to the company's expansion.

Other imminent changes include eco-tourism, with the construction of a hotel in Saint Lucia to host people who wish to take a closer look at the world of chocolate. Today the chain boasts 33 outlets distributed all over Great Britain. The original order catalogue is now flanked by an online store, which since 2007 also ships orders to the United States.

**Key points of innovation**
- An integrated company spanning cultivation, production, multichannel retail, and eco-tourism with tours of plantations and factories
- A retail area that conveys the multi-sensory experience of chocolate
- A luxury shopping experience communicated convincingly through the store
- Storytelling to enhance interest in product
- High personalisation options with both B2B and B2C
GREAT BRITAIN

Sk:n

Specialist skin and body treatments have become accessible to all: a chain of innovative centres that has won over customers with its modern retailing approach.

Sk:n is a chain of centres specialising in the care of the skin and the body with long-standing expertise in the application of non-invasive laser surgery for hair and skin blemish removal. In 1990 the company launched its activities under the brand name of Lasercare, practising in clinics and hospitals around the country. In 2005 came the turning point with a re-branding to Sk:n and the opening of the first retail-focused outlet in a high street location. This was done to emphasise the full range of services which complement the laser treatment, including a wide range of highly specialised skin treatments and operations which cross the line between medical practice and beauty therapy. The excellent results obtained in the fields of aesthetic and curative treatments are sustained by a programme of constant innovation at both medical and technological levels.

Since being re-branded the chain has grown rapidly, and has developed an innovative location strategy, opening new outlets directly in accessible and prominent positions in the centres of major UK cities, presenting their range of treatments in stylish and modern environments. In this way they successfully attract a large number of casual passers-by, who can drop in for advice on skin care. By targeting impulse buyers directly on the city's principal shopping streets with outlets that resemble the boutiques nearby with striking window displays, shelving and visual merchandising techniques, Sk:n marked a departure from the traditional beauty clinic with its austere, often intimidating décor and fixed appointment scheme. In the Sk:n centres the retail areas, where customers can browse and pick out products as they please, serve both as a lounge where people

Key data
- Format: specialist skin-care centres
- Launched: 2005
- 31 centres
- 40 sqm average retail floorspace
- 100 sqm average treatment area
Key points of innovation

- Retail approach to beauty and bodycare centres
- Convenient locations that draw in the casual passer-by
- Accessible prices
- Strategic deployment of multiple channels

Thanks largely to word-of-mouth today Sk:n provides treatment for 24,000 customers per month, and now boasts over 30 centres around the country, becoming Britain’s leader in the sector. The company’s ambitious plans for expansion envisage opening 150 new centres in the next five years.
In a city like Tokyo the buying public is undeniably spoiled for choice by the sheer abundance of alternatives for every possible type of product, ranging from toothpicks to the latest generation of mobile phones. This boundless choice has some serious snags, however, starting with the consumer’s disorientation as he is faced with such a bewildering range of goods and too little time to choose. In order to address the need for greater simplification, the chain-store RanKing RanQueen has been using an efficient system for streamlining the choice by showcasing the finest products in each category, and ranking them as “royalty” purchases, which are dubbed “Kings” and “Queens”. Each week the sales figures are gathered from the city’s big department stores and are integrated with independent market research data to create a shortlist of hot products, from which the prime scorers are given a place in the RanKing RanQueen outlets. Depending on the category, only the top 3, 5, or 10 SKU actually make it to the stores, where they are featured in the display windows and on the main shelves. This cherry-picked assortment comprises of 250 categories.

Key data
- Format: “top ten” store
- Launched: 2001
- 12 outlets
- 50 sqm average
- 1,000–1,500 SKU

A case of “mass-market meets glamour”: at RanKing RanQueen the assortment is updated each week on the basis of the top-ten best-sellers of each category.

RanKing RanQueen

In Japan - Tokyo
of merchandise and numbers over 1,000 SKU in all, most of which are non-food goods such as razors, bath-salts, books, DVDs, stationery, and pharmaceutical products. Food is represented by a selection of popular products such as pasta, rice, soups and tea. The RanKing RanQueen concept was developed by the Tokyu Corporation, which operates in various segments of retail, alongside varied services and transport. Drawing on their long-standing experience, the corporation has chosen to locate their stores at metro stations or in the neighbouring area, by which they were able to develop the concept around their target group of mainly women between 20 and 30 years of age – the dynamic modern metropolitan woman who is fashion-conscious but is short of time. The arrival of RanKing RanQueen offers a snapshot of the going trends in Japan, even in terms of mass consumption. Thanks to this weekly turnaround of the assortment on offer, the corporation’s outlets have become a favourite haunt of young fashion-conscious women who take advantage of their lunch-break to check out the latest shopping trends in all areas of merchandise. As the founder Kazuyuki Tada points out: “RanKing RanQueen offers assurance to Japanese shoppers, who prefer to avoid making overtly original choices, or ones that are not shared by a broad swathe of the buying public.”

### Key points of innovation
- Maximum convenience with vast assortment
- Fast-fashion policy for mass-market products
- Streamlining of customer choice options
- Mass-trendy boutique
- Narrowing selection down to best-selling items
The number of foreigners in Italy will soon hit the figure of 4 million, and increases by an estimated 20% per year. These people constitute communities that create wealth, accrue savings, and their rate of consumption is constantly on the rise: nearly 100% of foreigners possess a mobile phone, and around 15% are buying a house.

To address the specific needs of these new citizens, and the non-European foreigners in particular, UniCredit Banca has launched a network of made-to-measure branches that offers a carefully integrated and innovative “welcome banking” program.

The idea is to encourage the client to feel at ease in an area that so far has largely been closed off to foreigners. Each branch has at least one foreign member of staff, in most cases a person from one of the majority ethnic groups of the neighborhood itself, so as to foster two-way trust and comprehension. The choice of the name “Agenzia TU” expresses the bank’s mission clearly, namely, to put the client in charge of his own banking experience. The entire project was designed by Crea International, and involves fluid, multifunctional spaces that encourage confidence between the client and the clerk. The bank has done away with physical barriers such as the teller counter, preferring an open encounter with desks and chairs. In the case of waiting, instead of standing clients can take a seat in an information area equipped with full online facilities at workstations to enable them to check their account status, monitor payment deadlines, and keep track of operations. In this way they are encouraged to take advantage of the option to use the online accounting
**Key points of innovation**

- "Welcome banking" strategy
- Two-way trust by having foreign members of staff
- Dedicated banking services (comprehensive data in several languages)
- Range of financial services tailored to the needs of the foreigner
- Simplification of communications (guide to "banking jargon")
- Fluid ambience design
- Extended opening hours

The marketing program of the branches pivots on a joint strategy of special events organized directly with the associations and cultural mediators of the various communities, or by word-of-mouth, which is a fundamental means of passing news around among this type of customer, as demonstrated recently by recent research carried out by the ABI (Associazione Bancaria Italiana). This steady stream of information by word-of-mouth is fostered both by the bank itself and by its foreign workers, who become a symbol for self-realization and success among their respective communities.
KidZania

An edutainment centre designed to help kids learn while having fun, and where companies can lay the groundwork for a positive rapport with young consumers.

KidZania is an edutainment centre that offers youngsters ways of acquiring skills and learning through a variety of games and play activities. The concept was launched in 1999 in Mexico City with immense success, and recorded 760,000 visitors in the course of its first year of activity.

KidZania was the first major centre devised to involve children in realistic gameplaying and allow them to test out the professions and occupations of adults. The centre is a reconstruction of a city in reduced scale, with streets, buildings, offices, a university, a bank, a supermarket, a factory, a hospital, a radio station, TV studios, a theatre, and even a Formula 1 track.

KidZania has its own currency, the KidZo, which participants can earn through the work they do in over 60 different types of job to choose from: doctor, policeman, ...
connections, reading rooms, and table games; alternatively they can participate in the tour and meanwhile learn something about their own kids during the visit, which lasts a maximum of five hours. The context is devised to prompt children to think, act, and raise their social awareness.

One of the underlying philosophies of the project is to give youngsters greater understanding of the world around them, the realities of adult life and hence of their own parents. In 2006 a franchise operation was launched, which involves adapting to local contexts and involving partner companies in each of the host countries.

The first European centre, developed in Lisbon, will comprise 30 partnerships, including the multinationals Unilever and Nestlé, but also Portuguese firms such as Galp Energia, and the retail giant Sonae.

Key points of innovation
- Edutainment focused on children
- Interaction between brands and consumers
- Intelligent and proactive family marketing
- Development of social awareness in each activity
Desigual

A creative brand developed on all fronts from design, communication, events, and stores that evokes the atmosphere of a street market.

The name means ‘different’ and the slogan is “Desigual, it’s not the same”: from its inception the brand’s market positioning of originality and creativity was part of the style of the first collections (original and atypical Spanish high-quality wear at accessible prices). In 1998 the company began investing in retail, opening a series of distinctive mono-brand outlets that convey a strong brand identity as well as offering an excellent real-time barometer of shifts in customer tastes and demands.

Founded by Thomás Meyer, Desigual is a fashion label that produces clothes and accessories for women, men, and children, and since its launch in 1984 the brand has followed a holistic expansion strategy that works coherently at all levels.

Key data
- Format: brand store
- 1998 first mono-brand store
- 2006 first Market Store
- 100 stores
- 250 corner stores, and shop-in-shop

Company key data
- Launched: 1984
- 6 million clothing items sold in 2008
- 1,000 designs in each collection
- 4,500 multi-brand outlets
- Present in more than 50 countries worldwide

The Desigual shops offer a spacious, informal ambience designed to engage the visitor. While maintaining a clear identity, the brand has created various types of store, each one strongly characteristic with its own distinctive layout, displays, and visuals. Taking its inspiration from the famous Boqueria market in Barcelona, the “Market Store” typology greets its visitors with a rather unusual display of garments hanging from the ceiling, while inside the mood is determined by the unique arrangement of market-type stalls on which the clothes are loosely arranged. The walls are decorated with paintings, collages, and creations in vinyl. Each stall is completely redecorated every season, thanks to the flexibility...
The last store-concept is called “Neon”, based on a new lighting concept which highlights the most representative garments: a powerful blue light is used to frame clothing displays. Desigual’s approach to advertising matches the unconventional positioning of its merchandise, and includes sponsoring the environmentally friendly "Trixis" (rickshaws) that are found all over the city. One of the year’s most fun-filled events is the renowned marathon public kiss-in entitled “Desigual Kiss the World” held in Barcelona in 2007 and in Madrid in 2008, in which some 10,000 people took part.

The Desigual stores have fast become a vital focus of urban life thanks to the numerous events held on the premises, such as the Friends & Family evenings, which are parties with live performances with DJs, music and buffet, during which the store applies special offers to their most loyal clients. This kind of initiative is typical of Desigual’s approach to its customers and its ongoing efforts to involve them, to swap ideas and cater better to their needs, expectations, and preferences.

Key points of innovation
- Coherence between brand, product design, and store identity
- Uninhibited and impactful design
- Fluid and flexible retail spaces
- Fun-filled shopping experience
- Unconventional marketing approach
**House of Bols**

The re-launch of a historical brand of spirits thanks to a multi-sensory Brand Store that guides the customer on a journey through space and time, through modernity and tradition.

The Dutch distillery Bols was founded in 1575, and is the world’s oldest producer of distilled spirits. In 2006 the company returned to Dutch hands with a new marketing strategy that pivoted on the creation of the House of Bols, a multi-sensory experience dedicated to the brand’s product range, which boasts superior quality for its age-old recipes and brewing processes, while not overlooking the development of new taste trends.

With its site fortunately situated right opposite the Van Gogh Museum in Amsterdam, the House of Bols has quickly become one of the major tourist attractions of the city. The space itself has been painstakingly designed in every detail, and is devised as a gallery with a pre-set route that takes the customer from the company’s early history, including a seventeenth-century painting that appears to have been given as payment for debt by none less than Rembrandt van Rijn, who at the time was an assiduous frequenter of the distillery.

Ample floor space is assigned to one of the traditional ingredients of the Bols spirits range, namely, juniper extract: a section introduces the plant’s characteristics, and offers various samples, enabling the customer to touch and smell. All this happens inside a wisely orchestrated environment that is enhanced by the presence of several original 17th-century cash-registers. Those interested may also learn how to identify certain tastes and aromas by following a specific sensory course that allows one to learn further about the special properties of certain spirits.

**Key data**

- Format: experiential brand store
- Launched: 2007
- 700 sqm, on two floors
- Admission age limit: 18
- Admission fee: €11.50 including a cocktail
- 25,000 customers in first year
- 85% foreign customers
- 2007: winner of Dutch Design Award

**Lucas Bols**

- Founded 1575
- €95mln turnover
- Present in 110 countries worldwide

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**THE NETHERLANDS - Amsterdam**
At the bar proper, acrobatic bartenders dexterously create cocktails from the wide range of Bols spirits, but customers can also try out their own concoctions with the help of touchscreen stations that guide them through possible combinations. An area devoted to sales presents the entire range of Bols spirits, some directly on tap, or in special stone bottles. Also available are numerous accessories, including a professional barman’s kit, and certain exclusive items such as a shaker in silver or gold dotted with 480 diamonds. The merchandise on display ranges from select clothing items to a refined line of “bottles” in the form of Delft-porcelain houses, hand-painted, and created exclusively with the Dutch airline KLM. Among other gimmicks is the chance to created personalized labels to stick on bottles.

The upper level is occupied by the Bols Bartending Academy, which organizes courses in Bartending, Barmanagement and Flairbartending, which is training for acrobatic juggling with bottles and shakers. Bols has established certain special techniques and ways of improving one’s grip on the bottle, and meanwhile in a special room customers can try their hand at juggling techniques, film themselves and email the video to friends.

Bols is keen on encouraging people to choose their high-quality products in moderation, both for customers directly and also for barmen. For this reason admission to the House of Bols is for 18+, even if accompanied by an adult.

Key points of innovation
- Concept of a multiple sensory experience
- A mix of tradition and high-tech
- High level of interaction with the customer
- Targeted variously to attract tourists as well as professional barmen
- Keen to encouraging responsibility and moderation
Selexyz is a Dutch chain of bookstores which over the years has applied a very unusual location strategy for its stores by choosing each site on the basis of the architectural qualities or history of the building, occasionally opting for premises that lie outside the more trafficked shopping areas. As a result of this process each Selexyz store has a distinctly different character while maintaining an overall coherence in the style and quality of its retail design which has made the store identity instantly recognisable.

A fourteenth-century church is converted into a bookstore with a bold but intelligent makeover that deftly combines design, lighting, and perspectives to merge the site’s history with its new identity.

Selexyz Dominicanen

The chain’s latest entry stands out from its predecessors, however, because the new outlet is housed in a fine old church built by the Dominican Order in 1360, long ago deconsecrated. When in 2004 the Maastricht council gave permission for the building to be used as a bookstore, the chain’s holding company BGN assigned the design to the architect’s studio Merkx+Girod. The first challenge was to figure out how to effectively adapt

Key data
- Format: bookstore
- 1,200 sqm
- Launched: 2007

Selexyz Dominicanen
- 42 bookstores
- 25,000–275,000 SKU
- 11 million visitors per year
Given the huge glass windows, the quantity of daylight entering the building varies greatly according to the time of day or the weather. The perceptive solution applied was to build a mezzanine along one side only, which includes elevator access for people with mobility impairment. The shelving and fittings are all in black-painted metal, and the new structure is rendered less obtrusive by creating gaps in the fixtures to allow visitors unimpeded views of the original construction, thereby ensuring a constant dialogue between the building and its new identity. The new store’s winning feature is how it manages to attract no only both its pre-set target of intellectuals and avid readers, but also the kind of person who does not often visit a bookstore. The upper levels of the new structure also allow visitors to appreciate and explore the church’s many different perspectives. On the third floor one can view the entire vessel of the building along the nave, and even study the painted vaults close-up. One of the most important features of the design is the lighting.

**Key points of innovation**
- A unique setting
- A design that establishes a dialogue between ancient and modern
- Targeted to both the avid and the occasional reader
- High media profile based solely on the project investment
In light of the steadily dwindling numbers of people visiting traditional shopping malls, the Metro Group decided to investigate the cause of the decline, and discovered that this particular kind of environment induced feelings of fatigue, largely due to the sustained exposure to artificial lighting and the lack of fresh air. As a result of these findings, the German retail giant chose the Meydan centre in Istanbul for their new retail concept, which boasts a total floorspace of 70,000 square metres, with its inner frontage fanning out around an open pedestrian plaza appointed with fountains, shrubbery and assorted amenities.

In this way the centre has become a place where people meet up to take a stroll or to sit together in pleasant outdoor surroundings. Furthermore, Meydan has rapidly become a venue for various kinds of sports and cultural events.

The Meydan Shopping Square, as it is known, was designed by the British FOA studio led by the Spanish architect Alejandro Zaera Polo and the Iranian Farshid Moussavi, whose visually captivating design is matched by cutting-edge green technology which involves one of the largest geothermal plants in Europe. Heat from the earth itself is tapped via 200 conduits driven deep into the ground that channel energy up to the heating and air-conditioning plants. Furthermore, the 30,000 square metres of lawn covering the centre’s roofs provide further thermal efficiency by reducing the energy needs of the building complex. This system is calculated to save some 1.3 million K/h while supplying safer energy, which is accumulative and avoids...
Key points of innovation

- Shopping square developed around an outdoor pedestrian plaza
- Intensive integration of building with natural environment
- Innovative eco-friendly design technology
- Modern, functional and stimulating architecture
- Social uses of the complex

Shopping square developed around an outdoor pedestrian plaza.

Intensive integration of building with natural environment.

Innovative eco-friendly design technology.

Modern, functional and stimulating architecture.

Social uses of the complex.

labels such as Koton.

In one year the centre has already won several national and international design awards, and its easy accessibility from one of the main thoroughfares from Istanbul near the second bridge over the Bosphorus has helped trigger new residential investment in the neighbourhood, with both local and foreign real estate investors.

harmful gas emission and the release of 350 tons of CO₂ into the atmosphere per year. The energy is renewable because the Earth’s crust contains enough spare energy to power the world for the next 100,000 years.

The Metro Group had already begun to adopt low-energy air-conditioning systems in their retail buildings, but Meydan was the first they had ever constructed with a complete geothermal plant for both heating and cooling.

Alongside the cafés, restaurants, movie theatres, and places to meet or sit outdoors, the centre include many international labels such as Ikea, Real, Mediamarkt, Gap, Mango, Nike, Adidas, among others, but also Turkish fast-fashion labels such as Koton.

Thanks to the pleasing mixture of greenspace, shopping and eco-friendly amenities, Meydan has become one of the favourite gathering points on the Asian side of Istanbul.

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Transfer of Kohler brand quality to a store format, where products are arranged by function and placed at the disposal of the customer, complemented by an integrated health spa.

**Kohler Store & Spa**

Kohler is a historic company that has produced bathroom and kitchen accessories for 135 years. Over time Kohler has progressively expanded its product range, branching out into furniture and fittings, while also augmenting its business activity by shifting into the real-estate market and hospitality sector.

Despite these new subdivisions, the Kohler Group has nevertheless managed to keep its signature quality, while evolving a healthy interchange between its heritage and these new activities, for instance by creating a chain of health spas with its own products within the framework of the Kohler hotels.

The most recent Kohler retail outlet is sited in an upmarket complex in the suburbs of Chicago that boasts a blend of residential real estate, offices, and retail areas. The outlet’s commitment to providing high-quality content follows an approach that replaces the renowned do-it-yourself self-management with a more “do-it-for-me” style. In-store communications (“Tons of alternatives, so little time: ask for advice”) prompt visitors to seek help, and all members of staff are trained to provide expert counselling on purchases, and to assist the customer in their choice of kitchen or bathroom fittings and Kohler products most suited to their needs.

Many of the accessories on show are connected to the building’s plumbing system and so customers can test them out on-site.

The store’s advanced experimental format includes:

- **Key data**
  - Format: retail outlet + health spa
  - Launched: 2008
  - 300 sqm of retail floorspace
  - 850 sqm of health spa
Key points of innovation
- Store integrated with the health spa
- Health treatments designed and “signed” by the brand
- Products and accessories that can be tested directly at the spa
- A move from do-it-yourself to do-it-for-me
A workshop-store in which kids and adults alike can explore their passion for model cars and build personally customised designs – with nearly 560 million different combinations!

Ridemakerz is an American chain of workshop-stores in which customers can purchase model cars they have fully customised themselves. The idea comes from the highly successful Build-A-Bear chain for personalised soft-toys, who are also partners for the present enterprise. In this way, customers become customizers and design their own fantasy automobile or truck, with prices ranging from 13 to over 100 dollars depending on the bodywork and paint-job, and on such optional accessories as crash-guards, wheel-hubs, and chassis, etc. Also available are kits for special models, such as the “Turbo Kit” with a combustion engine, spoilers, side exhausts, special silencers, and folding-back bonnets. For an additional 25 dollars customers can add a remote-control. The design process comprises seven separate stages: the customer chooses a body for their model, then the sound of the engine, which is run by a microchip; then he decides on the wheels and grille guards, and can add other accessories before fixing the licence plates and baptising the new vehicle with a model name. At that point he pays the total of all the individual components. There are 36 basic models to choose from. The company currently holds licences for the reproduction of Dodge Challenger, Dodge Ram, Ford F-250 Super Chief, Ford Mustang, Dodge Viper, Mini-Cooper, and the Scion xB. The “Ridez” are all on a scale of 1:18 and consequently measure between 25 and 30 centimetres in length. Customers can purchase online directly from Ridemakerz.com, choosing

Key data
- **Format:** workshop-store
- **Launched:** 2007
- **12 outlets**
- **200 sqm average**
- **649,000,000 possible combinations**
Key points of innovation

- Customers personalise their own product
- Utmost attention to quality and detail
- Process integrated with the website
- Collaboration with local communities

Ridemakerz - USA

from either the vast range of complete Ride kits, or from the catalogue of accessories, in both cases the products are unassembled so as not to ruin the thrill of building one’s kit at home.

The website also provides a “build-your-Ride” facility for customising your order, a section devoted to the history of the automobile, and chapters on renewable energy and alternative forms of fuel.

The company has created a brief five-point guide that has proved particularly useful in standardising the Ridemakerz outlets’ sales code, and for orienting the approach of the stores’ personnel.

- Choice. Customers are given free rein to explore the myriad combinations
- Creativity. Fosters the customer’s natural creativity
- Trust. Customers are either assisted or left to themselves to choose, a format that has ensured success
- Co-operation. The personnel work shoulder-to-shoulder with customers as they build their models
- Community awareness. Ridemakerz sponsors local communities and non-profit organisations in each location

Testifying to this last point is the fact that as each new store opens, the company donates 1,000 dollars to the local office of the “Big Brothers Big Sisters” non-profit organisation which runs a variety of mentoring projects and volunteer work campaigns (www.bbbsa.org) for young people.

In 2008 Ridemakerz won the first prize for best retail concept under 500 square metres, awarded by the leading retail magazine Chain Store Age.
An acronym for “As Seen On Screen”, ASOS is an online fashion store that markets garments and accessories, and soon rocketed to sector leader in Great Britain behind Next, even taking account of the various multichannel outlets. The ASOS offering is targeted to young people who keep close track of how the stars and public figures are dressed, and proposes the same look at affordable prices. The offering began with women’s apparel, but soon broadened to include clothing and accessories for men too (menswear now accounts for 15% of the company’s turnover), then extended to shoes, various accessories, jewellery, and beauty and cosmetic products. The average receipt comes to £53, with 2.5 items per order: while the own label accounts for 70% of sales, this is complemented by 250 other brands including Balenciaga, Gucci, Chloé, and YSL, with numerous premium-brand garments of up to £1,000 lending a note of glamour to the house brand items.

The resounding success of ASOS.com stems from its determinedly creative approach to the market, which is endorsed by numerous initiatives running in parallel and a watchful eye on the evolving trends and patterns in the buying public’s behaviour. In September 2006, the company launched its magalogue, which two...
sometimes delivering orders by 4 p.m. the next day. This streamlining cut the number of returns too, containing them within 21% - a record for the sector. Since the end of 2008, ASOS has addressed the market demand for an online bargain factory outlet with its “ASOS Red”, a dedicated designer discount website where buyers can browse items from 300 brands with 75% reductions on list prices.

Key points of innovation
- Dynamic offering targeted to media-conscious wannabes
- Constant alignment of offering with media and star trends
- Development of high-end brands
- Innovative marketing tactics
- Vast range
In an era of growing desire for inspiration in our day-to-day drudgery, Emitations enables you to dress up in luxury designer clothes worn by stars and celebrities.

In 1999, an enterprising student of economy Au-Co Mai noticed some possible attractive openings in the sector of designer jewellery based on certain luxury pieces worn by celebrities, whose status automatically guaranteed the pieces’ ever-increasing high-profile exposure. Realising that to start up would require a tiny initial outlay, Au-Co Mai decided to launch her idea on the web, which was only just beginning to attract online retail. The gamble paid off handsomely, and now this e-tailer has cut herself a fair slice of the international market.

The Emitations concept is based on consumers’ fervent interest in celebrities – how they dress, what they are buying, and all the gossip on their lives. The brand has zeroed in on this aspiration-driven niche of style and consumption, and has found a way to grant these celebrity wannabes their dreams at accessible prices.

Most of the company’s publicity comes by word of mouth or from members of their online community, who exchange titbits of gossip and provide feedback that helps the company choose new products, along with the constant market research effort.

To encourage this exchange, the site produces a lively newsletter that keeps track of new trends in celebrity spheres and has become a vital vehicle for the company to promote its own high-end line of jewellery. The formula deployed involves tuning into the latest trends in fashion and aligning the company’s new product lines with these fashion forward celebrity looks.
always keeping the offering within reach of the target’s purse. Emitations keeps its customers involved in the marketing process by allowing them to vote on the items listed in the catalogue, leave comments with a picture option, and to share opinions on the product range, with links to personal profiles on the many growing social networking websites. This kind of interactive, “infectious” marketing enables customers to feel part of a community of decision-makers that can in turn influence emerging trends.

Emitations is a selection of specific jewellery. Emitation’s success shows in its current leap of 40% over last year’s turnover, thanks to a sharp rise in overseas buyers, whose numbers have just doubled.

Key points of innovation
- Luxury items available online
- Mix-and-match kit
- Innovative product search system by TV series, celebrity, etc.
- Wide multi-target range
- Excellent value for price ratio
- Growing overseas clientele
Threadless.com

A brilliant example of “democratic innovation” in which an online community creates its own T-shirt designs, and allows users to vote on the designs to decide which ones to actually produce and sell, with the proceeds going to the designers.

Threadless is a revolutionary concept that produces and markets T-shirts with designs proposed and chosen by an online community composed of designers, customers, and fans that can join the site for free. The idea came to Jake Nickell in 2000 after he won a T-shirt design competition, and decided with his two partners from skinnyCorp, Jacob DeHart and Jeffrey Kalmikoff, to run the competition again. Since then the system has been developed further and perfected. The “creatives” (including non-professionals) upload their designs to the website using the digital kit made available online. The broad palette of possible colours includes special details like light-sensitive dyes that only appear under sunlight. After the designer’s proposal is put online, the community has a week’s time to vote and to leave comments. If a designer is not fully satisfied with the idea, he or she can opt to display it online and ask for advice and feedback, before submitting it officially for the vote. The final shortlist is vetted by the site managers at Threadless using criteria that has been steadily evolved in the course of the site’s activity. Interestingly, even designs that have divided opinion among the community members are sometimes put into production, given that often where opinion differs.

Key data
- Format: multichannel retail community
- 2000: launch of the site and community
- 2007: first store opens in Chicago
- 700 design entries sent in per week
- 4–6 new models chosen per week
- $18–9 per T-shirt
- US$30 mln turnover for 2007
Key points of innovation

- Business run by the community
- The entrepreneur guides the production process and acts as guarantor
- Specialised but with vast assortment
- Sales estimated on the basis of pre-orders
- From e-commerce to multiple outlets such as stores and galleries
Ebeltoft is a Retail Business Alliance, which was founded in 1990 in Ebeltoft, a little seaside village in Denmark. It is comprised of 16 firms that have a common, strong focus on the retail and service business, and provide consulting and a wide range of services to help retailers and suppliers in the retail sector remain competitive and achieve their goals. Ebeltoft members work worldwide both for market leaders and for important or emerging local players.

The Ebeltoft Business Alliance has been studying trends and innovations in Retail since it was founded, and since 2005, has published a yearly report entitled Retail Innovations that focuses on emerging trends and the most interesting cases worldwide.

**Main Services**
- Retail Branding
- Strategic Analysis and Planning
- New Concept Development
- Multi-channel Strategies and Management
- In-store Insight and Customer Surveys
- Shopper Category Management
- Retail Tours

**Members**
- A.S. Louken, Singapore
- Dia Mart Group, France
- Eurosis Consulting, Turkey
- Frontline Strategies, Australia
- Fuhrer & Hotz, Switzerland
- GIRA, France, Switzerland
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- Kiss Retail, Spain
- Mc Millan Doolittle, USA
- Pragma Consulting, Great Britain
- RAMMS, India
- Retail Institute Scandinavia, Denmark, Sweden and Norway
- Honorary Members: Bill Webb (London College of Fashion) and Raffaele Miraglia

www.ebeltoftgroup.com
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Photos have been supplied by Ebeltoft members or directly by the retail firms.

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Fabrizio Valente, founder partner of Kiki Lab and founding member of the Ebeltoft Business Alliance, has coordinated the 2009 research.
Beyond every horizon, new horizons always rise

(Michael Ende)

Given how things are, it may seem out of place to talk about retail innovations this year. Yet we think the subject is still worth discussing, albeit this time with a different outlook. The gamble that companies face today is increasingly tied to their ability to establish a two-pronged strategy, that is, to tackle the immediate situation with rapid and enlightened tactics, while not neglecting the strategic dimension of what lies further ahead, nor overlooking the signals that will guide us out of the present turmoil. When this “crisis” has blown over, the strategies adopted to overcome the difficulties will be decisive. Retail businesses will re-emerge strengthened only if they have managed to hold fast to their positioning, and have continued to demonstrate their willingness to invest in new ideas.

Innovation trends

- Socialtailing
- “I trust you”
- Pro-client efficiency
- Gloctalism
- Accessible dreams
- Greentailing
- Liquid retail
- Emerging retail territories

Cases

- Wal-Mart, super-ecostore
- Umbra, brand store
- Alice Delice, concept store
- Chronodrive.com, “click-to-store” concept
- Geologic Village, concept village format
- Fresh’n’Friends, convenience store
- Kastad, department store
- Real Future Store, hypermarket
- Room, DIY concept
- Dover Street Market, designer concept store
- Hotel Chocolat, chocolate shop concept
- Skin care clinic
- Ranking Rank Queens, “top ten” store
- Agenzia TU, banking agency
- KidZania, entertainment centre
- Desigual, brand store
- House of Bags, experiential brand store
- Selexyz Dominicanen, bookstore
- Meydan, shopping square
- Kohler, retail outlet+health spa
- Ridemakerz, workshop store
- Asos.com, etailer
- Emirates.com, etailer
- Threadless.com, multichannel retail community

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In 2009 Ebeltoft launched a new research program on the strategic issue of the “Trust Factor” into the Retail Brands. A survey was conducted in 11 countries with about 200 chains and more than 10,000 customer interviews to understand which companies are the Trust world champions, how they achieved this leadership, and the key drivers to increase Trust and retain customers.

To get a copy of Retail Innovations 5 and/or for a presentation of the results of the “Trust Factor” survey, please contact your local member of Ebeltoft: www.ebeltoftgroup.com

Ebeltoft International Retail Experts

Retail Innovations 5
Research coordinated by Fabrizio Valente - Kiki Lab and Ebeltoft founder

2009

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(Michael Ende)