

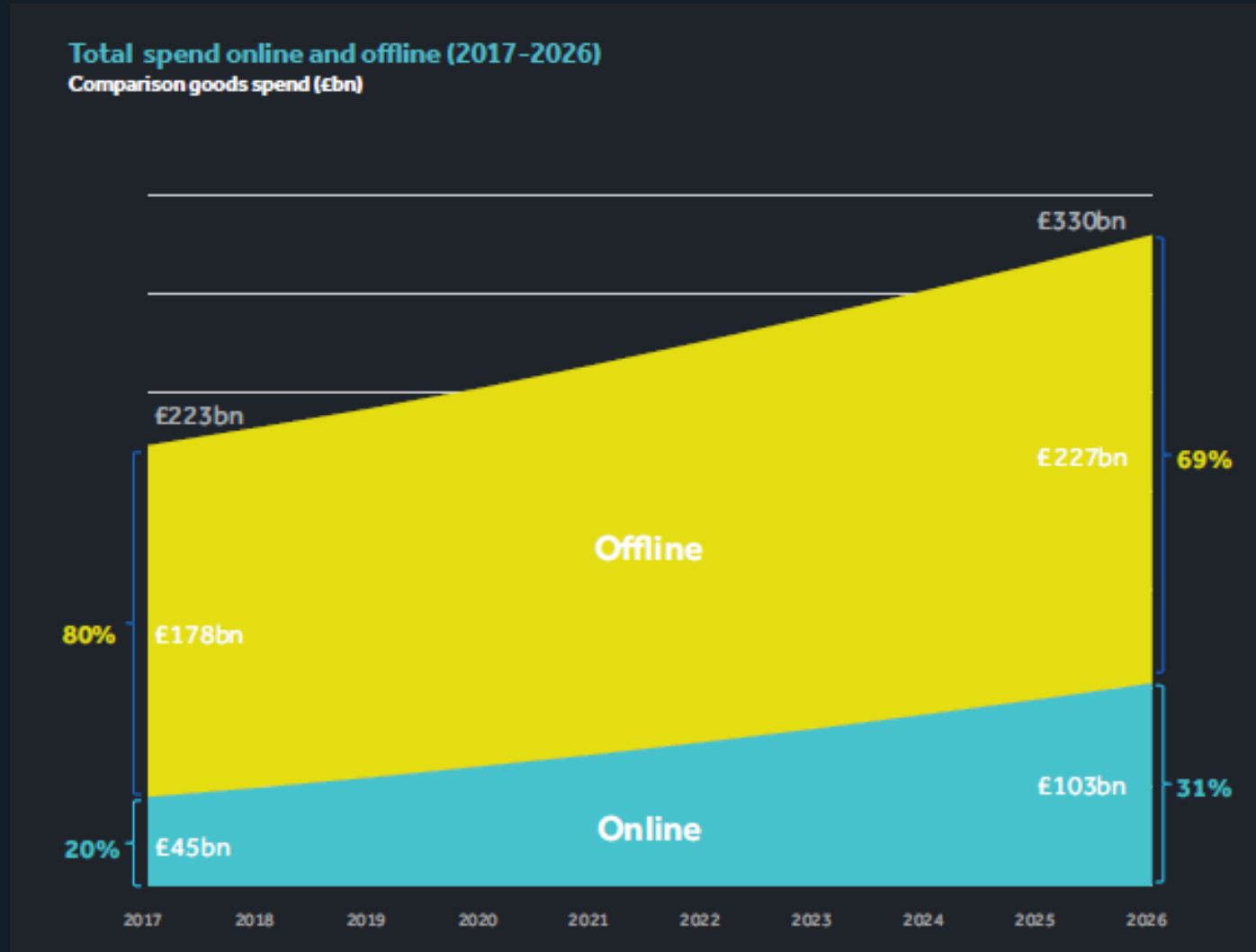
# The Physical Store in the Omnichannel World



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## The value of physical and digital retail



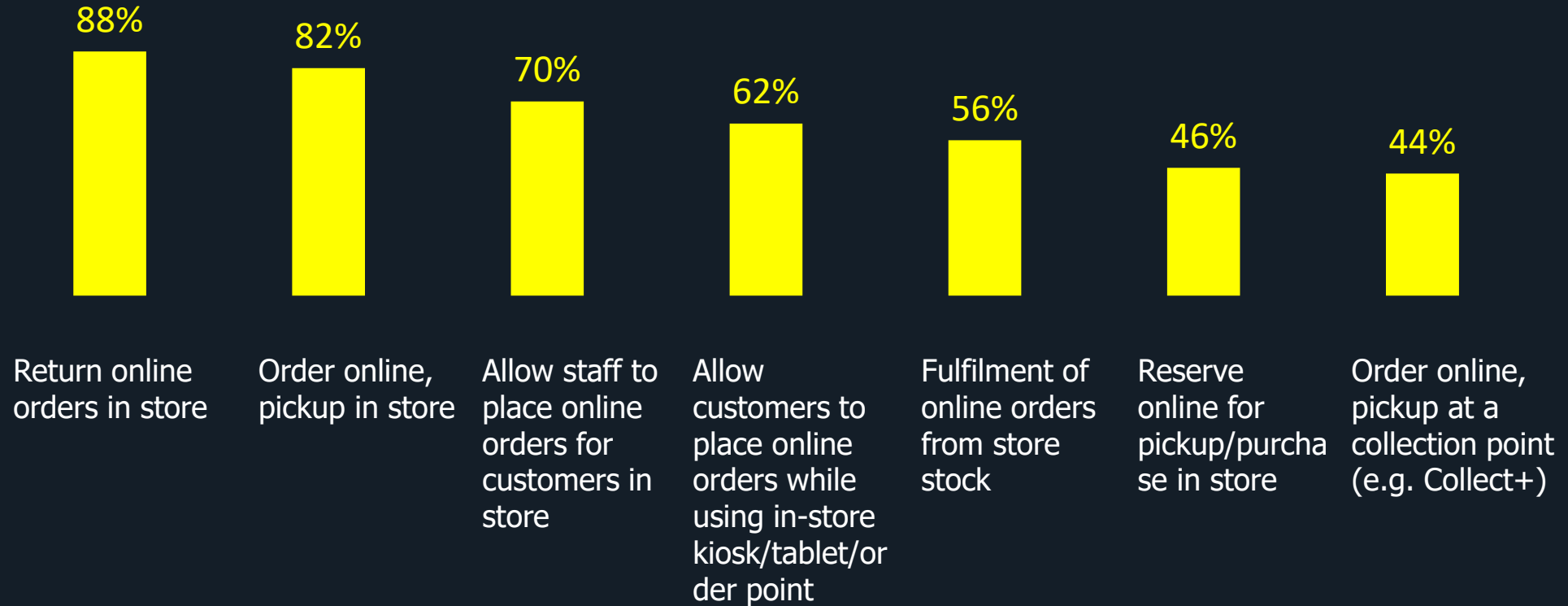
Source: CACI

- **86%** of the comparison goods spend touches the physical store
- 29% of online purchases touch the store
- The physical store is and will remain in coming years the dominant sales channel
- Customers do not differentiate between the channels, but expect a seamless experience

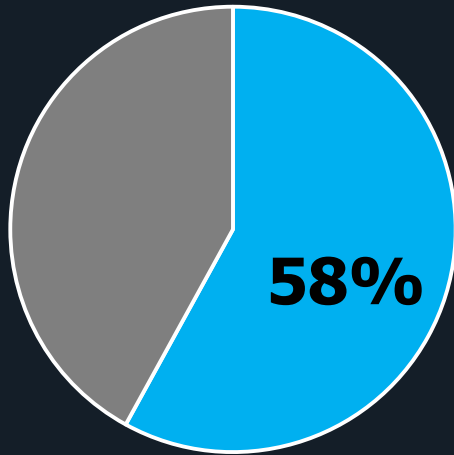
### **What retailers say**

“Everything we do to make it easier and more seamless for customer makes it more complex and difficult to understand for us as a business. We are doing what is right but it is making it more and more of a challenge to control our business operationally and strategically.”

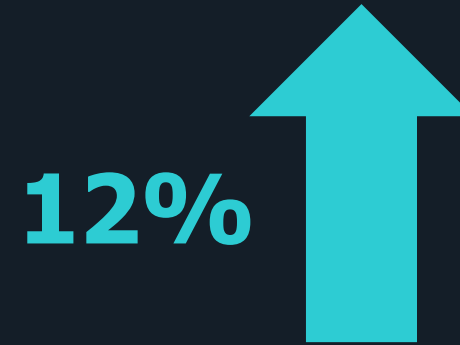
### How are retailers using their store?



### Blending of channels



58% of online sales have been influenced by store



On average, retailers have recorded 12% in online sales in the catchment area after opening a store

In the next 5 years we will see increase in retailers:

- Using separate P&Ls or sales lines for each allocation solely on where the order was placed
- Using shadow P&Ls
- Partially crediting online sales back to stores
- Allocating sales to where the order was picked up

- More customer choice means more complicated operations for retailers.
- Retailers expect more flexible approach to stores and more non-selling space in physical stores
- Retailers forced to take proactive approach to attract customers to physical store
- How this can be achieved and what role can the landlord play in this transition?



# Panel discussion and Q&A

**Chair:** Mark Williams, Director, Hark Group and Revo President

Ben Dimson, Head of Retail Business Development, British Land

David Kozack, Head of Real Estate, Ocado

Sophie Ross, Director of Strategy and Business Transformation, Hammerson



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Thanks for coming, we hope to see you  
again soon!



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