

## Home Shopping - UK - July 2012

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"The days when home shopping was distinct from store shopping are over. It's only analysts who try to make the distinction. For everyone else it is just shopping. And shopping is changing rapidly. If there is one clear message of this report it is that home shopping and store shopping are now fully integrated. Successful retailers have to be good at both. Those that are not are at a major disadvantage and many fail (eg, most recently, Clintons.)"

– Richard Perks, Director of Retail Research

### In this report we answer the key questions:

- Why have the old market leaders not succeeded in the new environment?
- Is there a limit for pure plays?
- And what about all this new technology which is coming on stream?
- So how important is price?
- Isn't it becoming rather difficult to distinguish between online and store based shopping?

This report aims to look at the whole spectrum of home shopping, even though it is, increasingly, dominated by online sales. The point is that it is artificial to make too much of a distinction between channels – the important fact is that the order is placed away from a shop. Does it really matter if it is made over a mobile, the phone or through the post?

The key, we believe is that retailers must make it as easy as possible to buy their brand.

And if you take that view then any retailer that ignores a channel is putting itself at a major disadvantage relative to the competition.

That sounds simple. But the distinctions are becoming more and more blurred. For example:

- Click and Collect: Is that an in-store or an online sale? One could argue it either way. But for the purposes of this report we treat it as an online sale.
- Someone who researches in-store and then buys online may well not have made that purchase if he or she had not seen the goods in-store in the first place. Yet that also counts as an online sale.

The distinction between the two sides is increasingly artificial and increasingly blurred.

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