



# 360° of Marketing: *The Retail Revolution*

Michelle Fenstermaker  
FITCH

# Agenda

- **Who is FITCH?**
- **3 Retail trends and their implications**
- **Experience Signature**
- **Cases in point:**
  - **PIRCH**
  - **Starbucks**
- **Key takeaways and recommendations**

# JOIN THE Join convo CONVERSATION

#FITCHRetailRevolution

@insightsgirl

@FITCHdesign

# GLOBAL EXPERIENCE DESIGN FIRM

14 Offices

9 Countries

	Moscow
	London
New York	Paris
	Delhi
Columbus	Beijing
	Dubai
Phoenix	Mumbai
	Doha
L.A.	Singapore
Atlanta	



**We do this work in a  
world other people  
call Omnichannel.\***

...which implies seamlessness – even  
though the reality can be anything but.



**FITCH**

We call it ***CONTINUOUS***

and in our version of this world these things have to be in harmony, are "always on", and need to be singing from the same song sheet.



# A world our retail roots make us a perfect fit for

and it's that DNA that lets us  
create solutions for shoppers  
and the brands that serve them.

MARKS THAT CREATE PROGRESS AND  
MARKS THAT HAVE NEVER BEEN  
THAT ARE AS UNIQUE AS EACH ONE



AR REACHING - AND CLOSE TO HOME.  
MARK FILLED WITH ENDLESS POTENTIAL  
SURROUNDED BY THEM DAY-TO-DAY.

**FITCH**



**We are naturally  
curious. We find  
inspiration  
where others  
don't.**



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A modern retail interior with a pink wall. A man in a plaid shirt is looking at the back of a woman in a dark top. The woman is walking away from the camera. In the background, there is a glass display case with a sign that says "Glitterati Life" and "Discover the power of metallics". A woman in a dark suit is standing behind a counter, smiling. The counter has a sign that says "Welcome". The overall lighting is warm and pinkish.

Step on a colour

Retail will change more in the  
next **5 years** than the last **50 years**.



**So, what will this world look like  
and how do thrive in it?**

1

**The ways in which we speak to  
customers will shift dramatically.**



# By 2020, absolute transparency will be table stakes.

## WHERE IT'S FROM

### Purified Water

Pharmaceutical-grade purified water makes up at least 97.9% of the liquid found in Amazon Elements Baby Wipes. The process starts with drinking water from the underground White Lick Creek Aquifer in Mooresville, Indiana. After the water is collected, it's purified in several stages—sedimentation, charcoal filtration, deionization, and ultraviolet disinfection. The end result? A wipe that's safe and gentle on a baby's sensitive skin. *(And yep, that's really a photo of White Lick Creek.)*

*Example: Amazon Elements*



The future will be all about  
dialogue not broadcast.

25%

Advertising

70%

Strangers  
with product  
experience

90%

Friends with  
product  
experience

Source: Edelman Trust Barometer, 2014

# 277 ideas

— BROUGHT TO LIFE —

More than  
**150,000**  
ideas submitted over  
the past five years



**2,000,000**  
votes have been cast on  
My Starbucks Idea - more  
than the last mayoral  
election in Chicago



Find ways to connect with the crowd.  
And then engage it in-store.

Idea #3  
**Free Wi-Fi**  
**7,500**



Starbucks in the  
Wi-Fi that can be  
accessed with just  
one click

**New  
Flavors**



Idea #144  
**Mocha  
Coconut  
Frappuccino**



Idea #275  
**Hazelnut  
Machiato**



Idea #233  
**Pumpkin Spice  
Latte VIA**

Idea #19  
**100,000**  
customers celebrated their birthday with a  
free treat over just **2 days** last March 2-3

Idea #34  
**Happy Hour**



**San Fernando, California** is  
the happiest city with the most  
Frappuccinos created during  
**Frappuccino Happy Hour**

Idea #202  
**Mobile Payment  
Through Drive Thrus**

Now you can just **roll  
down your window and  
use your phone** to enjoy  
your favorite cup of coffee



Idea #128  
**Cake Pops**

More than  
**5,800,000**  
cake pop treats enjoyed  
each year; with Friday  
being the most popular day



2008 2009 2010 2011 2012  
**25 28 64 70 73**

More is happening every day. **17 ideas launched so far this year!** Keep the ideas coming.

**FITCH**



smither77

FOLLOW

bmoroney12, mamamuniz, kellebell17, mandiepiece, Joymadison, kimberleigd, svelez919, mwomeld and nellroy79 like this

smither77 In case any one wondered why I spent so much time at my parents house...@melinsmith @kellebell17 #winedelivery

kellebell17 I'll be right over! Mmm... #etfille

bmoroney12 I'm coming over @melinsmith!



from The Daily Meal  
10 Coolest Wineries to Visit Slideshow

Lopez de Heredia (La Rioja, Spain)  
55 78 4

The Daily Meal  
Food Travel & Tips



Tana Henley Wino

Hall Winery's private tasting room off the Silverado Trail. The chandelier is stunning. by maryann  
55 9 1



Sasha Souza Events  
Sancho & The Bear



This Italian winery resembles a luxurious modern home, but maintains the spirit of a factory, with each compartment performing its individual task in making wine. The browns of the building blend with the green grounds, as do the horizontal and vertical lines leading to the



L'Imaginarium Winery - Tasting Room Info - Sparkling wines, the Imaginarium in Nuits-Saint-Georges in Burgundy  
55 1

Diana Diller  
Europe Trip



Market and Tasting Room...  
www.stlwinemarket...  
55 41 16



Jennifer Biermann  
Random, but importa



Antinori Chianti Classico Cantina which is mostly underground has a restaurant, winery, & tasting room. Italy... 30min from Florence  
55 8 1



Heather Turner  
Travel

Controlling the message is not as important as embracing that it's often owned by others.



rachelschlather

FOLLOW

42 likes 35w

rachelschlather My new favorite vino! #treatyoself #cheers  
asugark Umm my new favorite shoes!!!! Where from?!  
Isn'titdarling  
rachelschlather @asugark Dillard's! \$10  
fashion\_bling\_girlythings Wine and cute shoes are a winning combo!!



rachelschlather

FOLLOW

42 likes 67w

rachelschlather #latergram new fave place doing my always fave thing  
rachelschlather #clefashionistatravels

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# Implications:

**Never underestimate the power of good, “differentiated” story telling.**

**Harness the power of recommendations by bringing those to life in store.**

**Brainstorm new ways to redefine what “advertising” means to the next generation.**

**Embracing beta vs. perfection is ok– test often, fail and repeat.**



# 2

**The entire concept  
of convenience and  
value will shift.**



**Convenience** for the guest will not be defined in traditional terms of **time and ease**.  
We believe the highest currency for these new consumers will be **RELEVANCE**.

TR TASTING ROOM  
Home Your Account Your Wine Profile Your Shipments

Red Wine Profile White Wine Profile

Eric,  
Golden Child  
is your wine profile.  
**WinePrint™**

Share this White Wine Profile Print this page

You love rich, dense white wines. The fuller-bodied, richer - and perhaps *oakier* - the better.

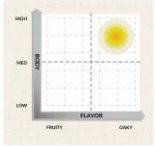
You like ...

... intensely ripe, full-bodied, oak-aged white wines that coat your palate with flavor that lingers.

Your tasting graph ...

Here's how your rating choices map out.

- Larger circles = strongly like
- Smaller circles = like
- Blank areas = not preferred




Grapes to start with ...

- Chardonnay
- Merlot

Drink these sorts of wine with ...

- butter-poached salmon
- roasted chicken
- steamed lobster



How to order wine ...

“I love, love, love *full-bodied* white wines like California Chardonnays. Bring... it... on.”

The wine-nerdy info ...

Look to regions known for producing rich, full-bodied white wines. The warmer and wetter the climate, the more grapes get to ripen, and the more sugar they get to accumulate. That's why, in the warmer, wetter climates of California and Australia, you'll find more full-bodied white wines.

Regions to start with ...

Where you'll find great value for the money ...

Since Australia is still flying under the radar with its excellent Chardonnays, there's great value to be found there. Also look to Chile and South Africa for super Chardonnays.

# Kristi, Big Red is your wine profile. **WinePrint™**

Share this Red Wine Profile Print this page

You love bold, fruit-flavored red wines with significant *body* - wines exploding with *flavor*. You enjoy meek wines about as much as an Enya album on slow speed.

You like ...

... wines that pack a punch, but aren't so *tannic* and dry-feeling in the mouth that you need to cellar them until Halley's Comet returns before they're drinkable. To you, the *Old World* is old school.

Your tasting graph ...

Here's how your rating choices map out.

• Larger circles = strongly like  
• Smaller circles = like  
• Blank areas = not preferred



Drink these sorts of wine with ...

- barbecued pork
- brisket
- crisp, roasted duck
- grilled steak
- lentil stew



How to order wine ...

“I like New World wines, like an Australian Shiraz, or a similarly fruit-driven wine that is *full-bodied*.”

Microsoft Outlook  
The wine-nerdy info ...

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## A shift from locating products to locating the best products for me

# Implications:

**Adopting a shopper centric path to purchase focusing on how they want to buy rather than how you want to sell ensures RELEVANCE.**

**Explore new and unique ways to bring curated, personal experiences to your customers (physical, human and digital).**



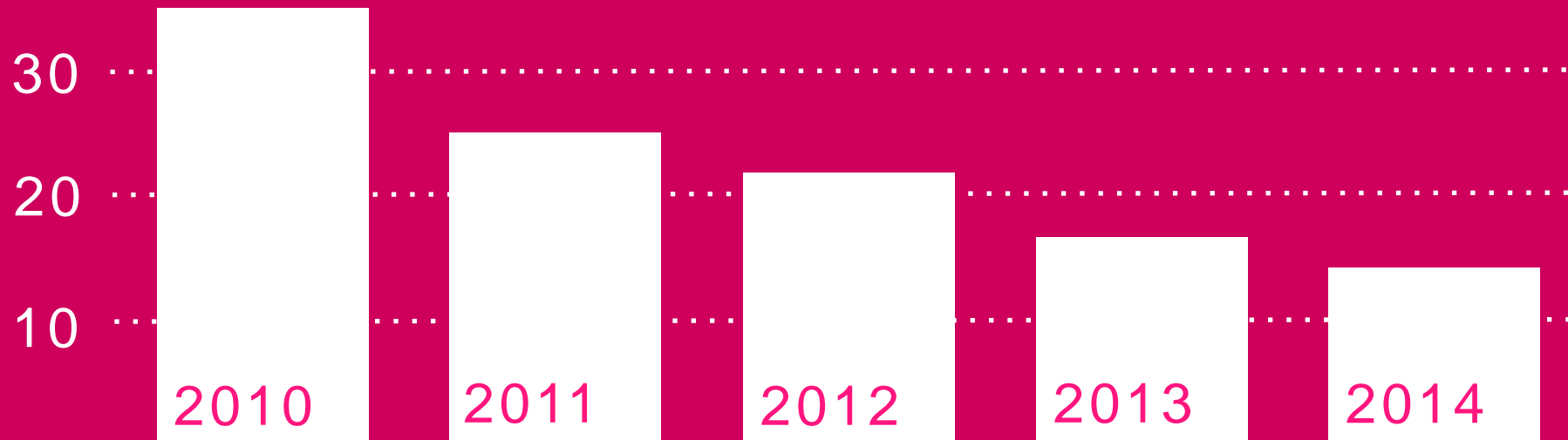
3

**Experience will remain king.**

# Foot traffic is down.

Nov/Dec Foot Traffic

40 Billion Visits



*Source: The Wall Street Journal, 2015*



Only in stores delivering truly unique experiences  
do we see increased visits and footfalls.

THE PATIO

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# Implications:

**Only way we can increase traffic is if we make the whole experience worthwhile and differentiated enough that customers can't wait to visit and tell others about it.**

**Create an Experience Signature.**



**SO, WHAT IS AN  
EXPERIENCE  
SIGNATURE?**

**An Experience Signature is a higher order,  
unifying principle of retail branding.**

**It informs, rationalizes and influences the ways in which a retail business presents itself to the world.**

**A unique combination of brand-led touchpoints  
that exist between a retailer and the people that  
shop its stores.**



And **every retailer**, simply by virtue of being in business, already has touchpoints between **itself and its customers.**

Literally any **point** that shoppers **touch** the retailer, whether through physical, digital or human interactions.

**PEOPLE**

**TOOLS**

**EVENTS**

**PLACES**

**GUEST**

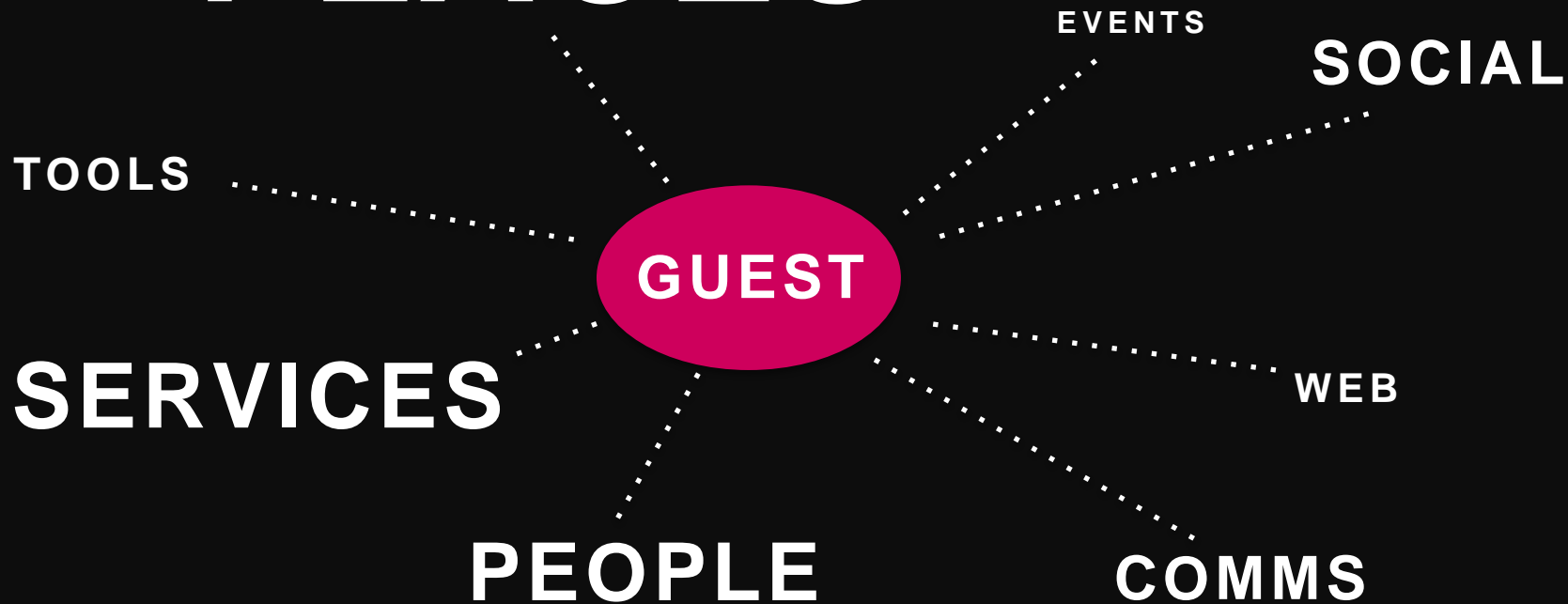
**WEB**

**SERVICES**

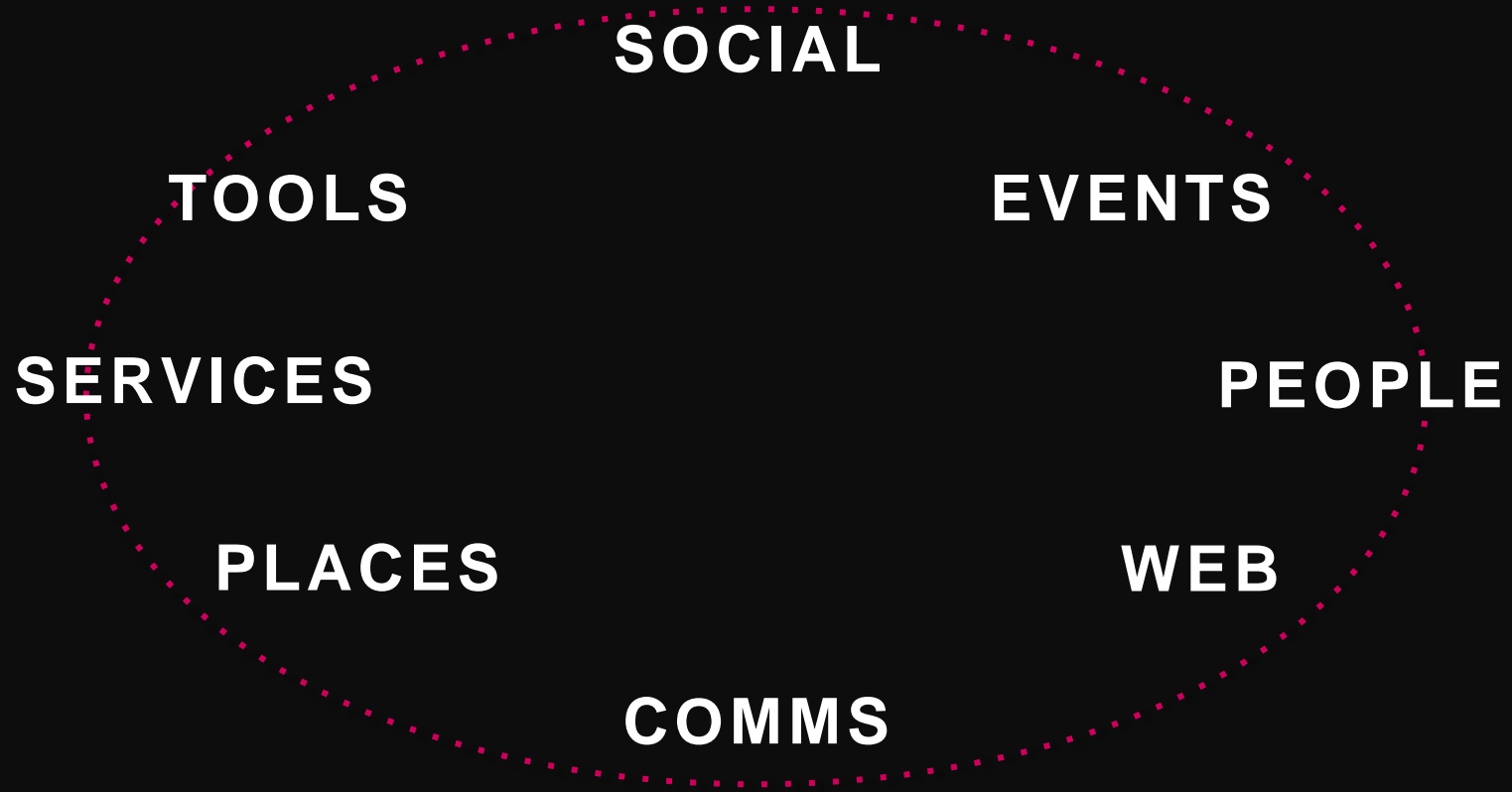
**COMMS**

**SOCIAL**

# PLACES











Only with **touchpoints** working in harmony, and infused with the **brand's DNA** can we be said to have achieved an **Experience Signature**.



A way to express yourself to the world that  
both **feels intuitively right** and which simply  
**could not be someone else's.**

**WHAT AN  
EXPERIENCE  
SIGNATURE  
ISN'T.**



**NOT YOUR BRAND**

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Your **BRAND** is who your are,  
what you stand for...it's your story.




If your brand is your **essence**, your  
Experience Signature is your **presence**.



**NOT YOUR PRODUCT**

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A man with a grey beard, wearing a straw hat and a plaid shirt, is shown in profile, carefully harvesting a bunch of white grapes from a vine. The scene is set in a vineyard with many other grapevines in the background, all bathed in the warm, golden light of late afternoon or early morning. The leaves are a mix of green and yellow, suggesting the start of autumn.

**BRAND** is who you are, **PRODUCT**  
is what you sell.

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**Your Experience Signature enhances  
your products, reinforces why they exist,  
brings them to life and adds meaning to them.**

**WHY DO EXPERIENCE  
SIGNATURES MATTER  
TO US IN OUR BUSINESS.**



Because they lie at the heart of why **one winery differs from another** in the minds of the people who visit, shop, and experience us.



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**An Experience Signature encapsulates all the things that we can be famous for.**





It encompasses the reasons we  
come back for more.







Find tacos, cheap dinner, Max's

Near San Francisco, CA



Sign Up

Home

About Me

Write a Review

Find Friends

Messages

Talk

Events

Log In

# PIRCH

★★★★★ 37 reviews

Details

★ Write a Review

Add Photo

Share

Bookmark

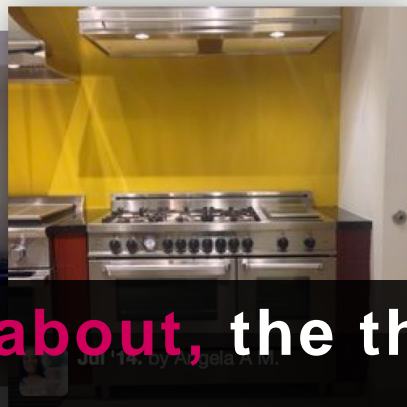
\$\$\$\$ · Home Decor, Kitchen & Bath, Appliances

Edit



101 S Brand Blvd  
Glendale, CA 91205  
Glendale

Edit



See all 58 photos

The things we tell stories about, the things we tweet, blog and post.



"I'm looking forward to attend one of their **cooking classes** soon."  
in 4 reviews



"Amazing concept, beautiful showroom, great traffic flow through the store, and best of all they start your tour with a **complimentary beverage** freshly made from a barista!" in 3 reviews



Today 10:00 am - 9:00 pm  
**Closed now**

\$\$\$

Price range **Ultra High-End**

A

Health score **A**

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Most of all, an Experience Signature  
creates retail that is **truly defensible**  
over a **lasting period** of time.



Or put another way, retail's **Holy Grail.**



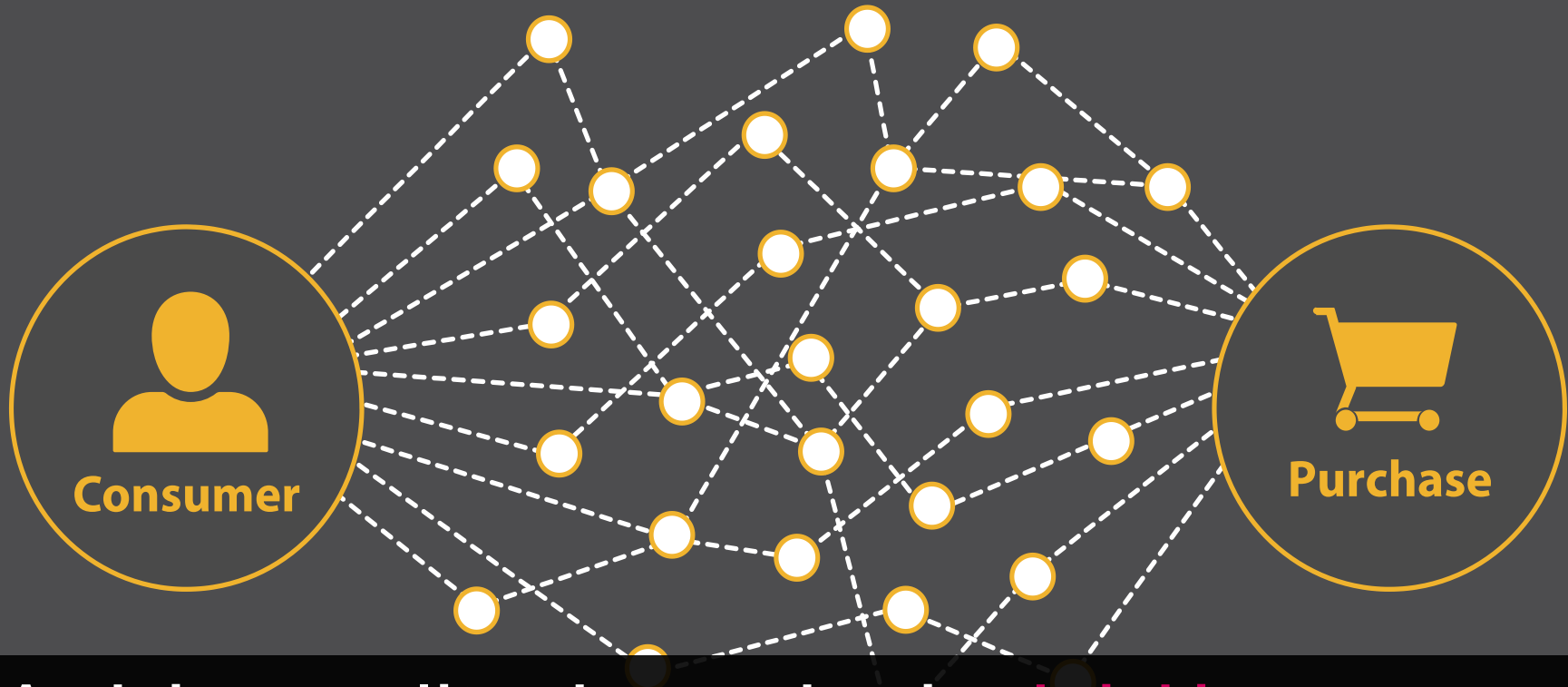
**SOUNDS GREAT  
RIGHT?**

Except for **one thing.**

**OTHERWISE  
KNOWN AS,  
THE PROBLEM.**

The **number of retailers** today who have achieved an Experience Signature is **very small**.





And, in actuality, the number is **shrinking** as retail becomes more **fragmented** and **complex**.



In certain categories Experience Signatures  
are not merely a **rarity**, they may be in danger  
of actually **becoming extinct**.

# THE OPPORTUNITY...

To tell shoppers **who** you are, **what** you are selling,  
**why** you exist and **what** you believe in.

Most of all **WHY YOU ARE  
DIFFERENT FROM THE  
OTHER GUYS!**

And to do it at **every touchpoint** you have  
with your customers, **every single day.**

**SO, WHO IS  
DOING IT WELL?**



The first things to say is that **non-retailers** are, for the most part, doing this much better than **retailers**.



virgin atlantic

Flying in the face of ordinary



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HOTELS

WORLDWIDE



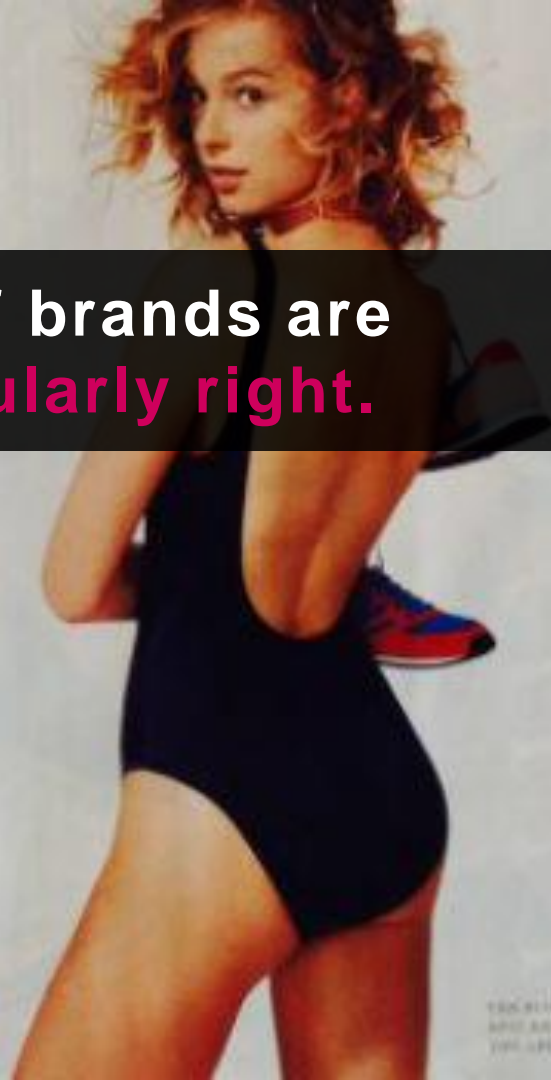


When it comes to retail, lots of brands are doing bits and pieces **spectacularly right.**

Dear Ms. Avinger,  
your wish is my command...  
within reason -

*To Jemma*  
J.CREW

JCRCW.COM

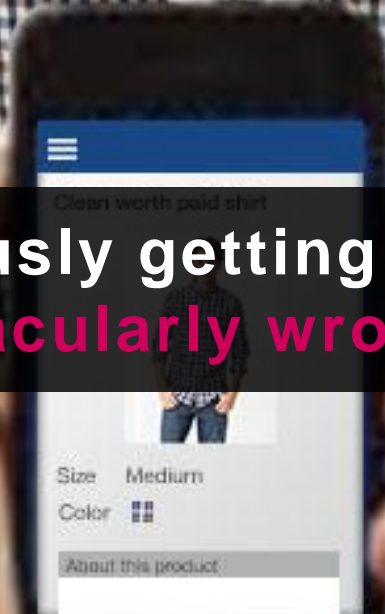


THE BROWNS & TANG  
AND ARE THE  
THE OFFICE

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While simultaneously getting  
other parts **spectacularly wrong.**







Or just **kind of wrong.**

But there are retailers which own  
**best in class Experience Signatures**  
- perhaps unsurprisingly they also  
represent **best in class retail**. Period.



**A BETTER  
EVERYDAY LIFE  
FOR THE MANY  
PEOPLE.**

**FITCH**

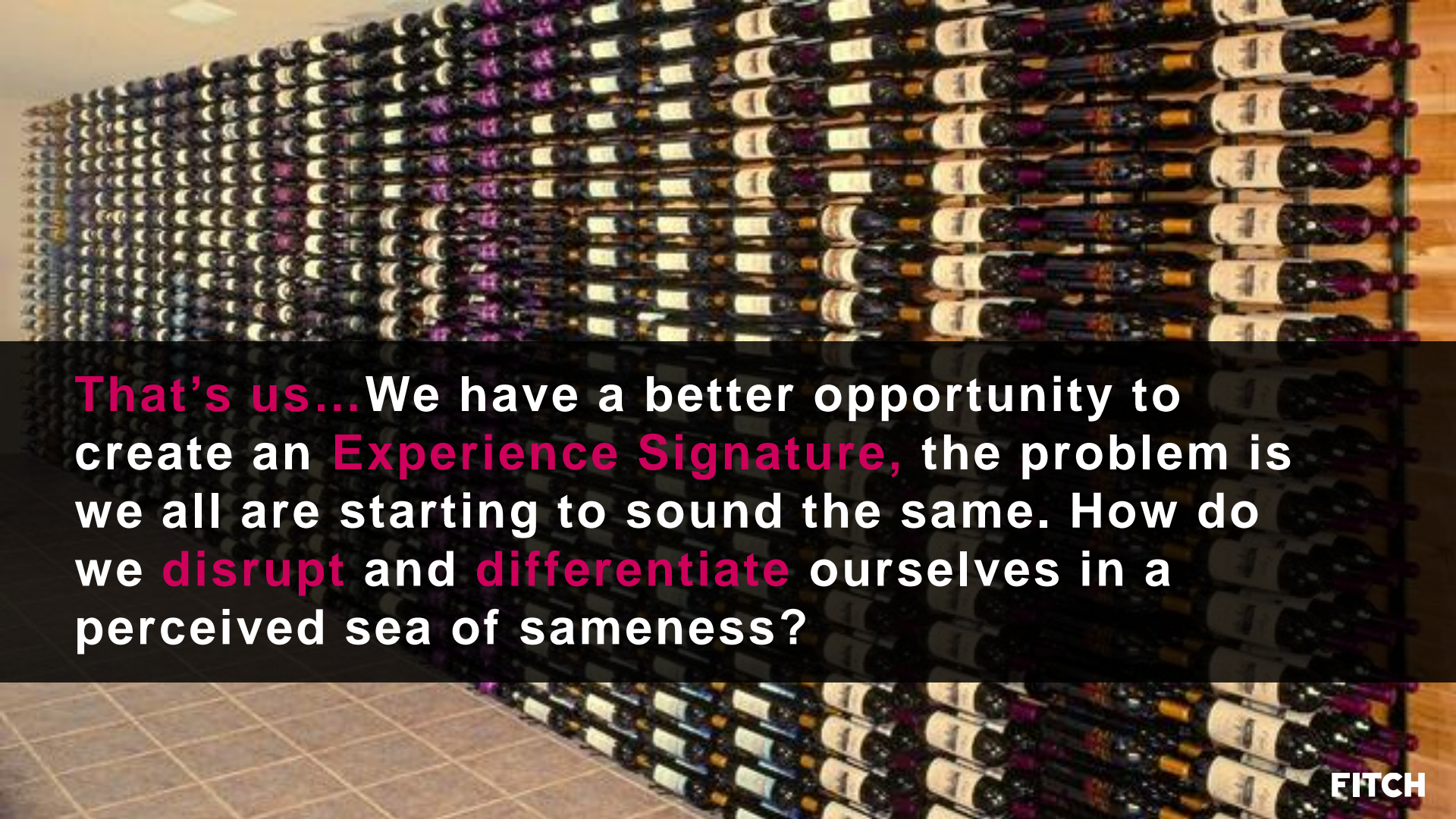




OK, SO WE  
SHOULD JUST  
GO BE IKEA?

Only sells its own **products**.  
Which they also **design** and **manufacture**.  
It only has one **voice** – its own  
And it only sells in its own **stores...**





**That's us...** We have a better opportunity to create an **Experience Signature**, the problem is we all are starting to sound the same. How do we **disrupt** and **differentiate** ourselves in a perceived sea of sameness?



**SO, HOW DO WE  
GET THERE?**

To achieve an Experience Signature you literally have to activate every touchpoint and infuse it with **purpose, meaning, and character.**

**And while an Experience Signature isn't the same thing as your brand, developing one begins with your brand.**

If you **don't know who** you are or **what**  
you stand for, **nothing** else will work.

We believe the strongest retail brands have evolved **beyond touchpoints** to achieve what we call an Experience Signature.

**It also begins with knowing your customers. At FITCH we plot the touchpoints leading to an Experience Signature against 4 shopper mind states.**

# Mapped across 4 consumer mind states

Dreaming, Exploring, Locating, and Experiencing



**Dreaming**

No Specific purchase intent



**Exploring**

Purchase intent in the category



**Locating**

Specific product or service



**Experiencing**

Post-purchase using product or service

# We create these signatures

Through Physical, Human  
and Digital experiences

## Physical

Immersive  
Immediate  
Tactile



## Human

Empathetic  
Approachable  
Kind



## Digital

Infinite  
Interactive  
Storytelling





	D	E	L	E
P				
H				
D				

**PHD/DELE WORKSHOP**

TO CONSIDER    TO DO    TRY & DECIDE    MAKE IT HAPPEN    HAPPEN

**P**

T05 EZYCOLOUR

T1 COLOURIDEAS

T2 COLOURWORLD

**H**

**D**

**FITCH**



# PIRCH

The reinvention of a category



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## CHALLENGES:

**Evolve the store experience to keep pace with changing consumer dynamics**

**Develop branded signature experiences**

**Creation of new merchandise categories**

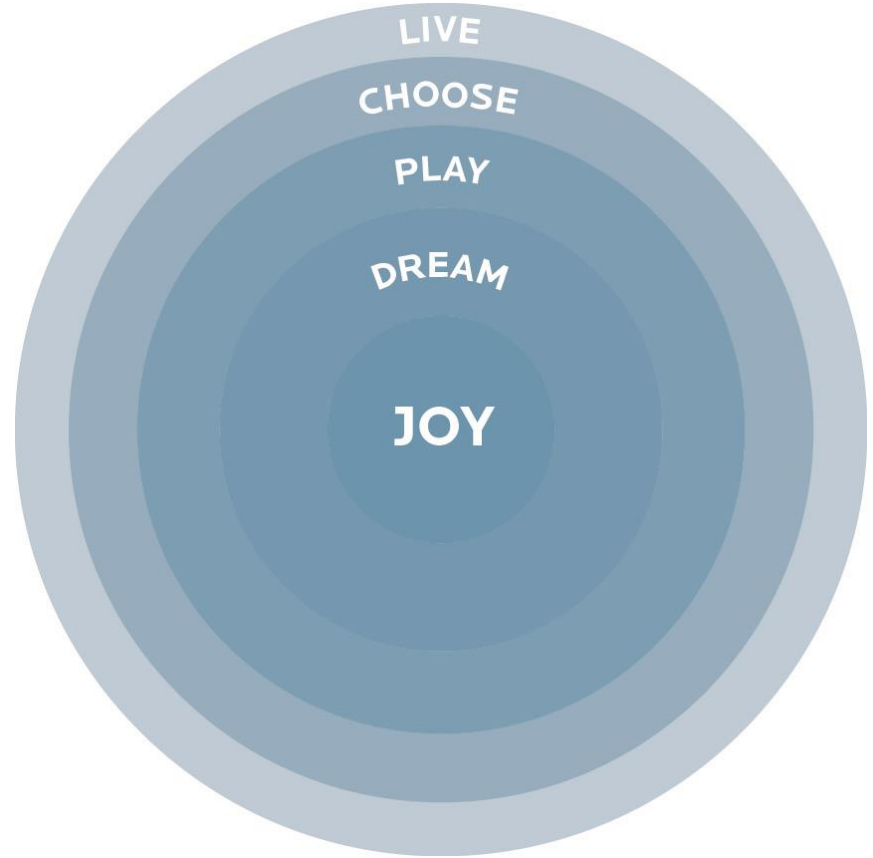
**Scaled for site adaptability**

**Take an experiential store from concept to build**

**OUTPUT OF DISCOVER**  
**The Strategic Brief**

# JOYFUL JOURNEY

Joyful Journey describes the fact that this is not a journey “into” joy. Rather it begins with joy and is continuous at every step and beyond. That each phase of the journey we provide enhances the lives of our guests in some way, whether this might be through experience, education or simple hospitality.





**EXPERIENCE SIGNATURE**  
Concept Design Development

**EXTERIOR**  
**BLISS CAFÉ**  
**SAVOR**  
**THE SANCTUARY**  
**DREAM ROOMS**  
**HOME SWEET HOME FOR THE Y CHROMOSOME**  
**ANYTHING, EVERYTHING DESK**

# EXTERIOR



# BLISS CAFÉ





# SAVOR

BRIDGET'S

Appliance stores don't have executive chefs — much less kitchens named after them. And yet, here we are, inviting you in. (So really, it's just an "appliance store.")

Bridget's is a place to learn and discover. To experiment and evolve. To perfect and to...well, occasionally burn stuff. Part classroom, part playroom, part sandbox and lab, this space exists to inspire you — much as Bridget's has inspired so many others — to discover your own personal recipe for joy.



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# THE SANCTUARY



FITCH



# DREAM ROOM



FITCH



# HOME SWEET HOME FOR THE Y CHROMOSOME






# ANYTHING, EVERYTHING DESK



## ANYTHING. EVERYTHING.

No request shall ever be too large.  
No request shall ever be too small.  
(And, just to be clear, no request shall  
ever be too medium-sized, either.)  
Because that's how we roll, here at  
The Department of Yes. From  
consultation and purchase to  
installation and service, we're with  
you all the way. Step right up for your  
fresh helping of Joy!

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## 2014 Chain Store Age Store of the Year

"The unique alliance between PIRCH and FITCH has created a new 'Camelot' within our industry, transforming a mere showroom concept into an unforgettable, experiential journey towards joy. We simply could not have asked for a more like-minded visionary partner."

Jeffrey R. Sears, CEO

**FITCH**



# RESULTS

## SANCTUARY

Sales per square foot higher than Apple across 25,000 sq.ft.

Ranked #25 on Forbes' Most Promising Companies.

...and 750 people in an appliance store on New Years Eve.

# Starbucks

Refining the brand story



## **Global Storytelling audit**

### **City visit & Desk research**

**Challenge:** Intuitively infuse Starbucks passion for coffee through effective storytelling within the retail environment.

**Plan of Action:** Explored retail trends and opportunities by visiting and investigating a wide range of cafes, bars, restaurants and stores across the globe.

**Uncovered:** 3 opportunities supported by key building blocks to enable a seamless navigation within a workshop scenario.

- **Back of house is the new front of house**
- **Community networks**
- **A sense of wonder**



# Back of the house is the new front of house

*Tell the Story — engaging the customer with a compelling narrative.  
Sharing stories of process and production.*

## Product Journey

- Establish feelings of trust and transparency
- Create distinctive perception of quality

## Worker Theatre

- Hero the craftsmanship and expertise of staff; creates personal brand connections

## In the know

- Revealing trade secrets highlight brand innovation and fosters dialogue with customers



# Community Networks

*Share a story- a great narrative is shared and retold many times.  
Blend in with local communities while also highlighting global reach.*

## A Sense of Place

- Engaging locals in wider projects

## Hybrid Hospitality

- Implement mixed-use spaces to access broader lifestyles

## Conviviality culture

- Implement communal spaces with innovative layouts to create convivial atmosphere



# Sensorial Wonder

*Experience the Story – memorable narratives inspire emotion and empathy.  
Immersing consumers in rich, multi-sensory environments to build stronger, enduring memories and deeper emotional connections with brands.*

## Evocative

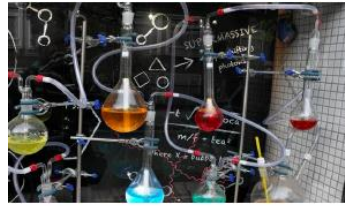
- Influence customers with theatrical or inspirational cues resulting in immersive playgrounds

## Just for you

- Offer consumers a unique experience with personalized services and increased interactivity

## Product centric

- Make products more human by giving unique personalities making them the central focus of store design



# Key takeaways and recommendations.

Key takeaways and recommendations:

Care less about the size of  
your operations and more  
about what you stand for  
and how you behave.



Key takeaways and recommendations:

Embrace and promote  
storytelling.

Key takeaways and recommendations:

Multisensorial  
experiences are the  
most memorable.

Key takeaways and recommendations:

Appoint an internal  
“Experience Signature  
Champion”.

## Key takeaways and recommendations:

# Get Busy With Your Own DELE/PHD

1. Audit your most admired competitor and fill up the matrix
2. Repeat exercise for yourself
3. Identify gaps and opportunities
4. Brainstorm ways to improve it
5. Pass ideas through filter of your brand
6. OWN THEM!!!