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Adapting for Access

Retailers Master Head-Turning Merchandising

4th Quarter 2012 - 15th ANNUAL MYSTERY SHOPPING STUDY

February 26, 2013

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THE DETAILS

In the spirit of the season, retailers have made clear choices about how to deliver customer experiences that best suit their brand. The e-tailing group's review of the 192 merchandising metrics finds retailers taking a status quo approach to their business as many of the tactics evaluated see little change year-over-year. Our interpretation of these findings combines an ecommerce maturity where retailers better understand today's shoppers sticking with tried-and-true classics that drive both conversion and the bottom line. Simultaneously, there appears to be a streamlining where only content that transcends channels remains desirable while superfluous features fall by the wayside. This release highlights findings from our most recent study with a look at two of our four head-turning trends that have been adapted for consumer accessibility via omni-channel customer experiences.

- Attention Seekers
- Head Turners
- Social Climbers
- Channel Connectors

A second edition will address the social climber and channel connector initiatives. The e-tailing group's 15th Annual Mystery Shopping Study, conducted during 4Q'12, benchmarks 314 metrics on 100 ecommerce websites across 13 consumer product categories.

What merchandising is mandated in 2013?

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THE TRENDS

Attention Seekers

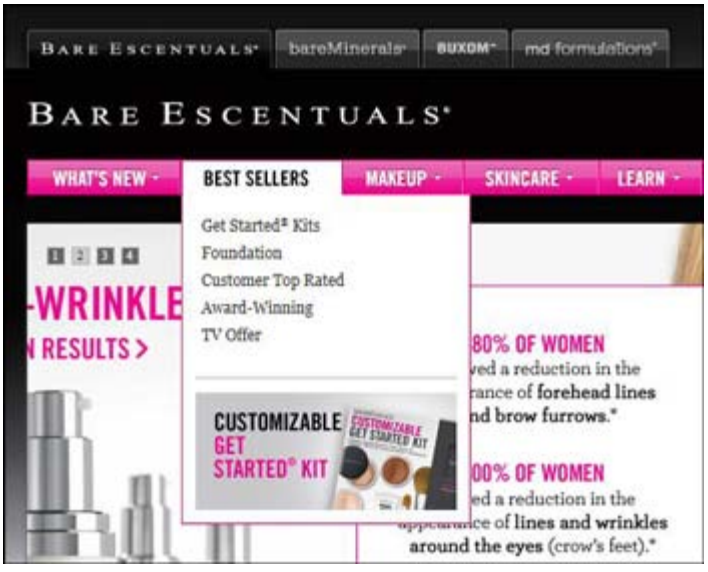
Catching the attention of a consumer can be challenging in today's competitive landscape. Retailers have turned to tactics that allow for greater assortment exposure in locations that are sure to be seen. **Navigational flyouts** quickly direct shoppers to products/themes of interest and, more importantly, 86% take advantage of this real estate, up from 81% year-over-year to show off a range of merchandising from top product and customer favorites to top-of-mind promotions. The **slide show** has also proven to be a perfect tool to better expose one's assortment where a broader range of product or promotions are being put in play as 72% of retailers have employed up from 53% in 4Q'11.

Videos continue to make inroads as consumer viewership grows exponentially. Retailers are making

investments at the product page level where 79% of retailers, up from 69% in 2011, have evolved the shopping experience to engage today's consumers. Retailers have also extended that **video presence via social** means with 70% encouraging shoppers to "take a look" at products via their Facebook pages.

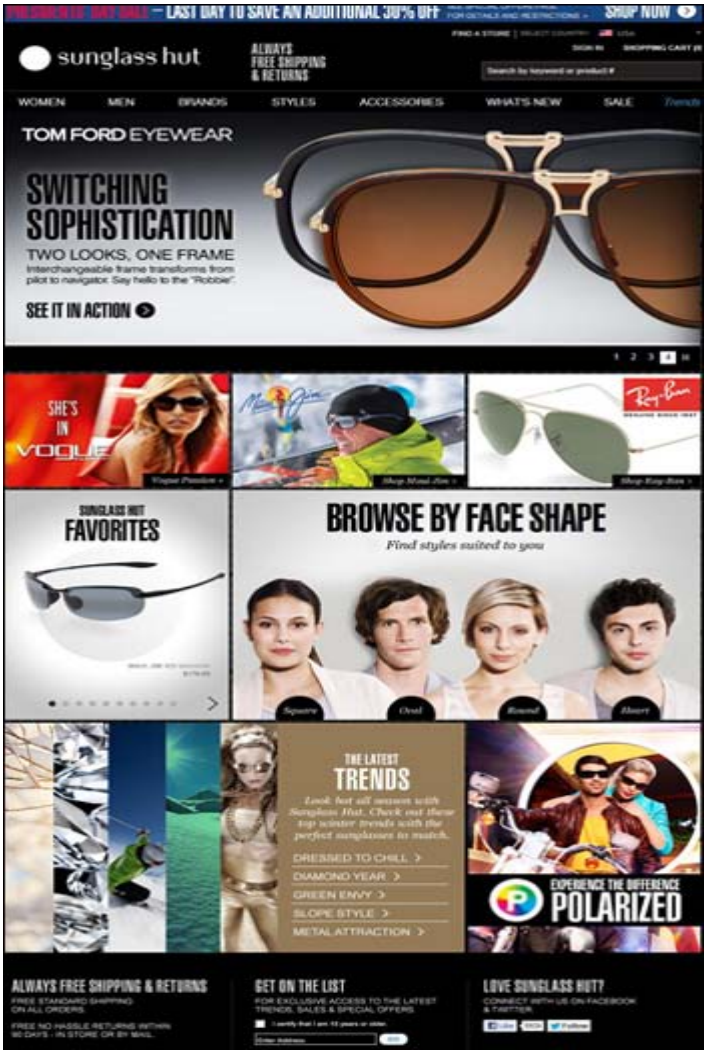
Attention Seekers	EG100 2012	EG100 2011
Navigation Flyouts	86%	81%
Navigation Flyouts with Merchandising	85%*	77%*
Slide Show of Featured Items/Promotions on Home Pages	72%	53%
Product Page Videos	79%*	69%*
Facebook Page Product-Oriented Videos	70%*	56%*
the e-tailing group 15th Annual Mystery Shopping Study * Subset of metrics		

Bare Escentuals takes advantage of their **home page navigation** to move beyond the standard category format. Incorporating what's new in beauty combined with best sellers serves as a springboard to merchandising tactics that will resonate with their shoppers. They adeptly merchandise **navigation flyouts** visually presenting their Customizable Get Started Kit, while also providing links to Foundation, Customer Top Rated, Award-Winning and TV Offer product.

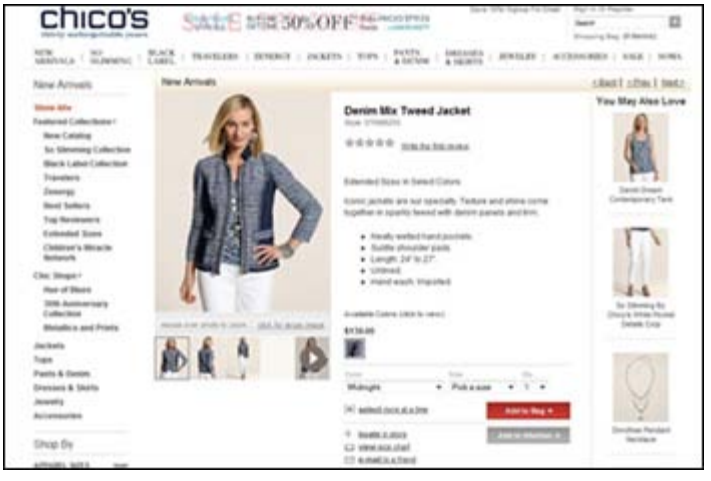


With real estate tight on the home page taking advantage of technology through techniques such as **slide shows** allows Dick's Sporting Goods to visually display more categories. They are able to expose seasonal businesses that are critical to their spring selling season including baseball and golf while highlighting the UA NFL Combine Technical Gear coming off the NFL Season. Scrolling arrows alert shoppers to this option ensuring they are in play.

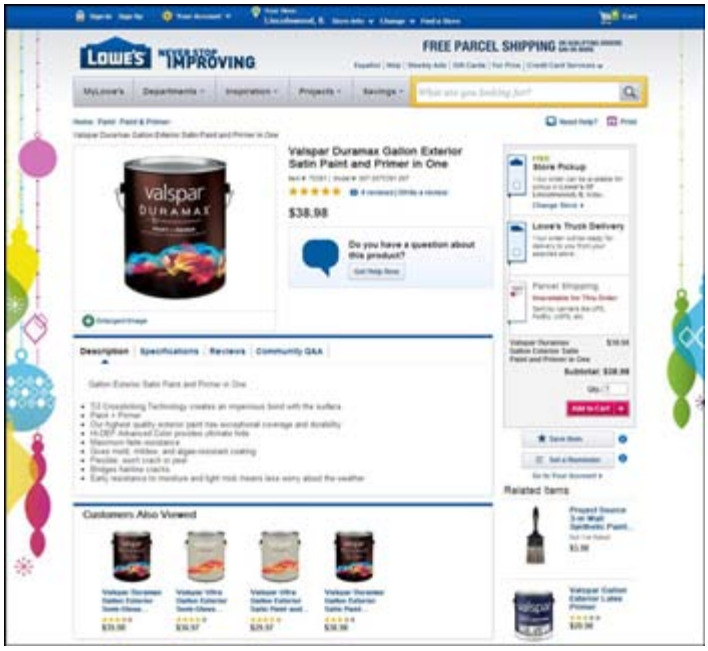
Sunglass Hut hones in the elements that make a strong **category page**. All of their tactics are sure to gain the attention of visitors to their site highlighting key items, customer favorites, showcasing the latest trends and presenting a “browse by shape” **interactive tool** that aides the shopper in making the right selection. While delivering significant functionality they manage to present it in a very streamlined fashion.



Chicos packs a powerhouse product page and complements this Denim Mix Tweed Jacket with supporting **video.** Shoppers are able to secure a sense of how the jacket moves and drapes taking this product beyond the standard zoom and alternative views. Such merchandising serves as a confidence builder to drive conversion while ideally minimizing returns on the back-end.



Retailers have many objectives in play in order to achieve their omni-channel goals as can be seen on this **Lowe's product page**. They include the standard fare but introduce community elements with **Q&A** and **Reviews**. Simultaneously, they have dedicated prime real estate to **Store Pickup** and **alternative delivery options** to support driving customers to retail where additional products will likely be purchased.

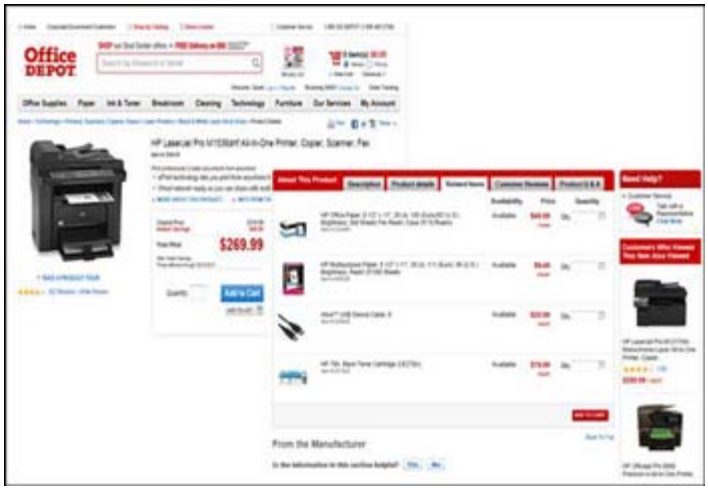


Head Turners

Gaining exposure also is accomplished through personalization where retailers continue to show **recently viewed** product (55% vs. 45%). Universally they deploy **product page recommendations** and have refined those experiences to be even more relevant (4.57 vs. 4.40). The **shopping cart** also helps make the right products more visible despite the drop in use of this tactic from 87% in 2011 to 79% in 2012. Those retailers are using this real estate to suggest more, averaging 5.74 products, up from 3.79 in 2011.

Head Turners	EG100 2012	EG100 2011
Recently Viewed	55%	45%
Product Page Recommendations	99%	99%
Product Recommendations Relevancy	4.57*	4.40*
Shopping Cart Product Recommendations	79%	87%
# Products Recommended	5.74*	3.79*
the e-tailing group 15th Annual Mystery Shopping Study * Subset of metrics		

The **product page** is the ultimate destination for **personalization** where strategy selection should be category-centric. Office Depot presents a page that is comprehensive where both margin-building accessories (related items) for this HP Laser Jet Printer are showcased in their tabbing format while also highlighting alternative products under the umbrella of “Customers Who Viewed This Also Viewed.”



Taking the shopping cart one step further, we have seen the relevancy for **product recommendations** rise at this critical juncture. With a goal of increasing one's basket size, Lego lovers see a top-scoring **shopping cart** that incorporates two head-turning tactics, first showcasing 4 product favorites with **quick view** access followed by **recently viewed** to keep that product top-of-mind in hopes of seeing an impulse purchase.

THE CHECKLIST

1. Ensure that the merchandising tactics you have selected receive optimal visibility throughout the shopping experience.
2. Utilize technology to facilitate assortment exposure through slide shows, scrolling and navigation.
3. Revisit the home page and the category page delivering "head-turning" merchandising that inspires your shoppers.
4. Leverage frequently visited navigation for functional search and optimized merchandising.
5. Prep shoppers with a comprehensive product page that showcases the best in imagery, copy and content to drive conversion.
6. Test video in strategic locations, particularly the product page to engage and educate visitors.
7. Enable cross-channel experiences that connect customers seeking product availability and retail store information.
8. Personalize shopping experiences from the product page to the shopping cart in hopes of driving AOV and customer satisfaction.

THE COMPANY

The e-tailing group, inc. serves as the multi-channel merchant's eye, bringing a merchant's sensibility to evolving the multi-channel shopping experience. A Chicago-based consultancy, they provide practical strategic perspectives and actionable merchandising solutions to merchants selling online as well as to enabling technology firms.

For more background about this research study, including a list of merchants surveyed or for

additional information on the e-tailing group, inc. please contact Lauren Freedman at LF@e-tailing.comor visit the e-tailing group website www.e-tailing.com.

THE STUDY

A report detailing benchmarks from *the e-tailing group's 2013 Annual Mystery Shopping Study* is available to purchase and download at www.e-tailing.com for $395.

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