

## **The Future of Retail**

A Unified Channel Strategy  
To Drive Brick & Data Retail

# Welcome To A New Retail Reality

The research findings presented in this report tell a new story. They tell us of a kind of rebirth for brick-and-mortar retail and we should all be left energized and motivated after reading every page.

We're not going to say that old ways will suddenly reappear: opportunity might be presenting itself but we still all need to change to meet the needs of the new shopper. Malls and shopping centers will never function the same, stores will provide a different experience, and mobile tools will provide a complementary service.

Blended retail is a single channel vision that mixes real world experience with dynamic data to allow retailers and brands to connect with the needs of the customer—and it ultimately drive sales. Leverage the contents of the **Future of Retail 2018** report as a framework to guide your innovation strategy to rebuild a rich and effective brick-and-mortar retail approach today.



**Piers Fawkes**  
Founder & President  
PSFK

## About PSFK Future Of Retail 2018

PSFK's Future of Retail 2018 report outlines how companies can transform their stores into experience centers that extend their supply chain and digital commerce platforms, creating mutual value with a focus on shopper experience.

The report will help brands, retailers and technology partners understand:

- Emerging consumer attitudes and market forces that are driving change
- Important trends shaping the future of physical stores, malls and offline retail
- Key strategies that retailers and brands should adopt to succeed
- Perspectives and forecasts from Fortune 500 retail leaders



*PSFK is the world's leading business intelligence platform for customer experience innovation.*

# Introduction

**After a tumultuous few decades that saw the world introduced to new terms like e-commerce, m-commerce and multichannel, the marketplace may have finally settled on a new reality—*that all retail is digital*. Just ask consumers.**

Today's highly connected shopper doesn't think in terms of physical, online or mobile. They simply want to shop with their preferred store or brand how and when they want and enjoy the best experience possible when they do. Which means that retailers and brands must break from the siloed approach that assigned different teams and strategies to each of its channels and take an integrated view of its customers, operations and stores. With our latest report, we apply this unified vision to the reinvention of offline retail, exploring how the best of digital—convenience, personalization and data-rich insights—can transform and enhance the brick-and-mortar experience.

By starting with a foundation of digital intelligence, retailers and brands can activate (and monetize) the physical store in entirely new ways. Now shoppers can benefit from the same level of recognized service they receive online, and companies, in turn, can monitor their behaviors to constantly refine merchandising and marketing. Common points of friction—checkout, stock availability and fulfillment—become streamlined, ensuring customers always get exactly what

they want in the most convenient way possible and businesses benefit from increased efficiencies.

With this digital infrastructure in place, retailers and brands can focus on amplifying the qualities that make physical stores so special—human connection, tactile experiences and product curation. Freed from the need to display endless aisles of inventory, smaller footprint showrooms can present products as part of an aspirational lifestyle, educating shoppers on optimal use cases and helping them achieve their broader goals. With the addition of one-on-one attention, partner services and events programming, companies can return greater value on their customers' investment in time, while simultaneously creating more incentives to visit.

Despite the recent struggles of traditional incumbents amidst the growing reach of digital-first juggernauts, we no longer see the future of retail as an on- and offline divide. The organizations who not only survive, but thrive, in this landscape will prioritize strategies that are channel-synergistic and customer-first.

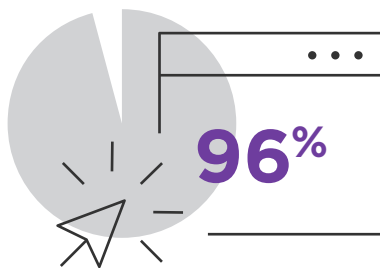


**Scott Lachut**  
President of Research &  
Strategy  
PSFK

# The End Of The Digital-Offline Divide

While there's a lot of doom and gloom in the brick-and-mortar marketplace, there exists a silver lining: brands such as Warby Parker and the b8ta Store are investing in offline because offline experiences enhance the customer experience beyond what a screen or digital assistant can deliver. However, digital integration—within the store and along the larger supply chain—is required for retailers to be efficient and effective at scale.

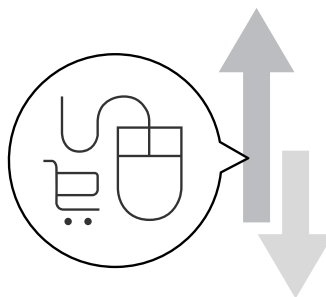
## Offline retail is struggling to compete head-on with e-commerce



96%

of Americans now do at least part of their shopping online.

Omni-Channel Retail Study. BigCommerce, 2017



# 2017

will be the first year that people expect their online holiday purchases will outweigh their in-store spending.

Retail Holiday Survey. Deloitte, 2017

## But offline has an opportunity to connect with consumers where e-retail cannot...



in consumer spending on experiences and entertainment this year



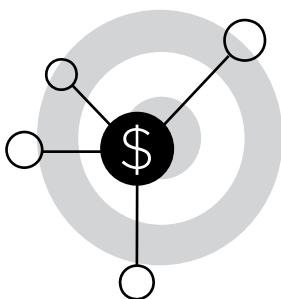
conversion for retailers who have invested in a variety of experiences



planned investment increase in retail experiences in the next 2 years

Barclaycard, 2017

## While integrating with digital for data-sharing and logistics

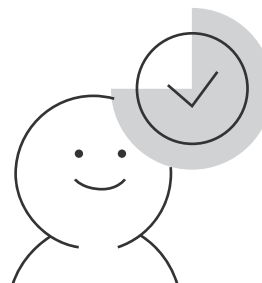


Target is investing

# \$7 billion

in capital to revamp stores, digital channels and supply chains to "work together as a smart network."

"Retail Logistics Bets on E-Commerce." Inbound Logistics, 2017



# 75%

consumers expect a consistent experience wherever they engage with a brand.

2016 State of the Connected Customer Report. Salesforce, 2016

# Consumer Insights: New Offline Expectations And Behaviors

"I believe the increasing space between the value and quality-driven mindsets of consumers will continue to grow. When a customer is seeking value, he or she will more likely compromise his/her retail experience standards. When that same customer is seeking quality, service and personalization will increasingly become the differentiator. Getting to that kind of understanding of your customer's priorities sooner will increasingly inform the luster of your lure."

Meghan Bush, Business Director of Experience Design, Eleven, Inc

## *Trends-Led Conclusions About What Customers Anticipate At Brick And Mortar*

### **Consumers see brick and mortar as a playground, not a point of sale**

- Want to learn more about a brand or product in a low-pressure environment
- View retail primarily as a destination for exploration and fun—hassle is not tolerated
- Are open to exploring new or niche players if curated through a trusted brand

### **Shop for an identity, not a product**

- Expect a brand to offer them the tools for product customization or modification; purchases are no longer commodities but tools for self expression
- See purchase as a gateway to an aspired lifestyle or community
- Value a brand's purpose, membership and experiences above its product offering

### **Don't want to save time, but to add value during their visit**

- Categorize convenience and immediacy as table stakes
- Don't want to spend less time at the store, but want to get more (in the form of experiences or content) during their store visit
- Approach stores as double-duty centers to make purchases and fulfill interests in education, community and self improvement

### **Expect brands to invest for the long run**

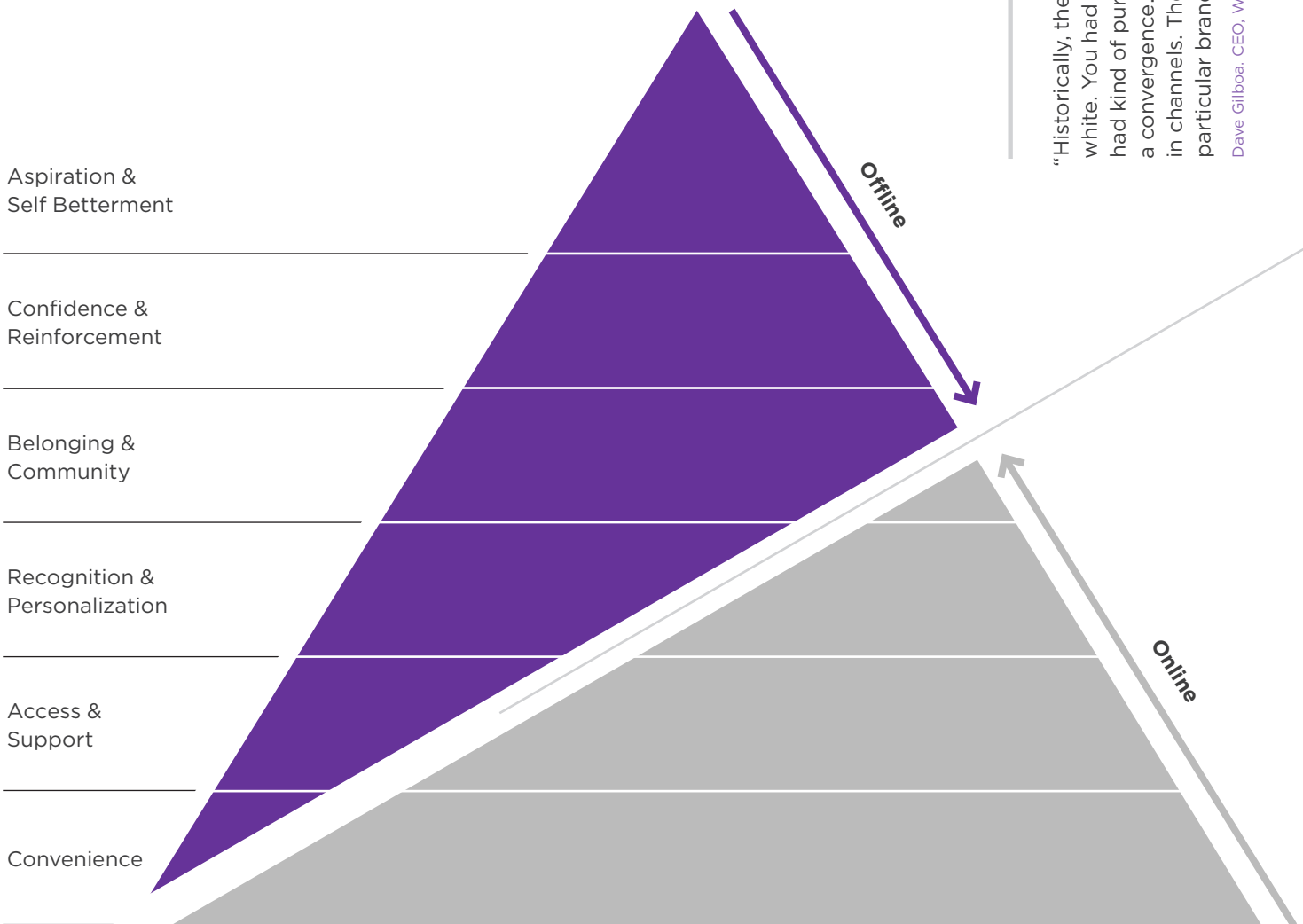
- Offer to share explicit and implicit data in exchange for a better experience and brand relationship
- Expect to be consistently recognized by a brand or retailer across channels
- Are frustrated when they have to start a relationship over, or are not recognized when they re-engage a brand or retailer

# Reuniting Retail Channels

*Consumers don't see a brand or retailer by its channels; they choose their preferred channel in the moment and expect a seamless and highly-quality execution. By creating a blended retail strategy that marries multiple platforms, companies can centralize best practices to address all of a customer's retail needs, from convenience to aspiration.*

“Historically, the world's been viewed as pretty black and white. You had e-commerce companies like Amazon, or had kind of pure brick-and-mortar retailers. You're seeing a convergence. Most consumers don't think of the world in channels. They think about their relationship with a particular brand or retailer.”

Dave Gilboa, CEO, Warby Parker



*Businesses have traditionally siloed their retail strategies, distribution networks and even financial reporting by channels—store, ecommerce, DTC, wholesale and others. Blended retail unlocks logistical and data expertise from digital teams and relationship-building from brick-and-mortar departments.*

Retailers and brands expect brick-and-mortar share of revenue to decline by 10% by 2020 and revenue from mobile sales to rise by 14%. Meanwhile, retailers expect share of revenue from desktop sales to drop 7%.

PSFK Future of Retail 2018 Survey

# 5 Key Pillars Of Blended Retail

*As the shift away from big box stores and endless sales racks intensifies, brands, merchants and shopping centers are asking the question—what will the future of the store be? PSFK's research shows that offline retail will be smaller and dedicated to experience and service. Stores will be less burdened by inventory and more focused on their depth of engagement, as well as data collection.*

## Stores won't necessarily drive purchase

Physical locations help address a shopper's desire to touch or try on an item, receive hands-on education and support, or build a deeper relationship with the brand. Rapid deliveries are processed through online or backend channels for near-instant gratification.

## Will be focused on a smaller footprint

Smaller format locations reduce a retailer's capital investment, allow associates to deliver more focused attention and create a more exclusive experience for the shopper.

## Will log in customers as they shop

Facial recognition and mobile syncing allow brands to recognize opted-in loyal customers—empowering associates to deliver tailored service while syncing purchases, preferences and browsing behavior on- and offline.

## Will be part of a distributed inventory network

Leveraging the fulfillment networks of e-retail or specialized partners, stores will be relieved of carrying their own inventory, while tapping into other stores or warehouses for products at a moment's notice. 'In stock' becomes 'in network.'

## Will iterate on visitor data

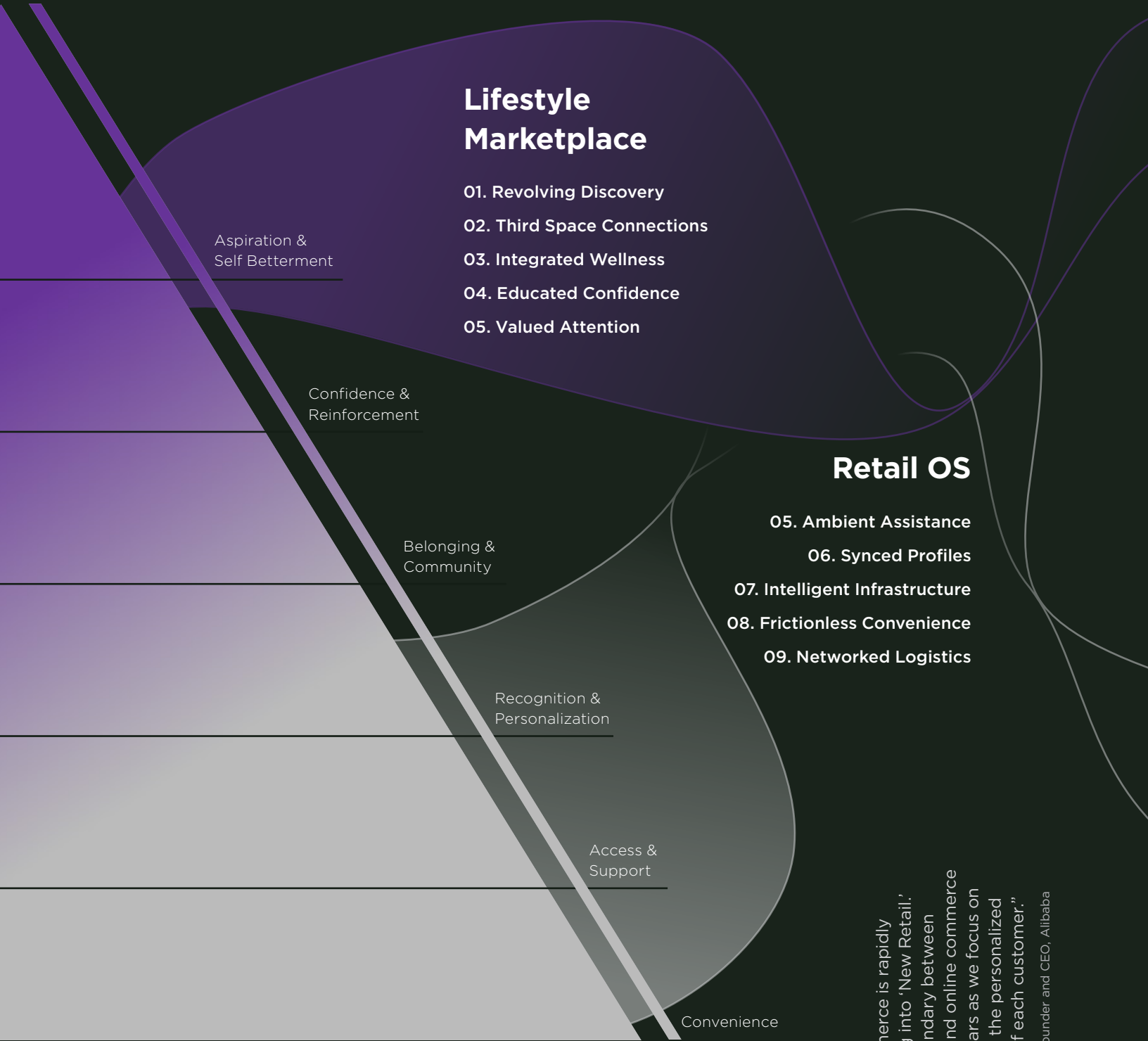
By measuring the browsing and conversion behaviors of in-store visitors, retailers will not only tailor 1:1 relationships, but also gather actionable data for rapid iteration of design, merchandising and marketing strategies.

## Top 5 Areas Retail Executives Are Investing In For 2020

1. Data Tracking, Collection & Management (**68%** of retail professionals)
2. In-Store Experiences (**55%**)
3. Delivery Systems (**52%**)
4. Loyalty Programs & Customer Relationship Management (**42%**)
5. Flexible Purchase & Returns (**32%**)

# A New Framework For Blended Retail

*While offline retail's opportunity lies in providing value beyond the transactional moment, brick-and-mortar locations must still fulfill the foundational role of delivering products and services to a consumer in a quick and immediate way. A blended retail framework builds brand experiences atop an necessary intelligent foundation that gathers insights and streamlines operations.*



## Lifestyle Marketplace

- 01. Revolving Discovery
- 02. Third Space Connections
- 03. Integrated Wellness
- 04. Educated Confidence
- 05. Valued Attention

Aspiration & Self Betterment

Confidence & Reinforcement

Belonging & Community

Recognition & Personalization

Access & Support

Convenience

## Retail OS

- 05. Ambient Assistance
- 06. Synced Profiles
- 07. Intelligent Infrastructure
- 08. Frictionless Convenience
- 09. Networked Logistics

“E-commerce is rapidly evolving into ‘New Retail.’ The boundary between offline and online commerce disappears as we focus on fulfilling the personalized needs of each customer.”

Jack Ma, Founder and CEO, Alibaba



# A New Framework For Blended Retail

## Lifestyle Marketplace

**Creating opportunities for exploration and identity-building**

Leveraging content, education and experiential activations to close the confidence gap and align the shopping experience with customer lifestyles and aspirations

## Retail OS

**Building an intelligence foundation**

Building a baseline level of data collection and connected fulfillment platforms that analyze and respond to customers' micro needs and deliver shopping experiences at scale, while improving backend efficiency

01

### Revolving Discovery

Programming locations with a constant overhaul of brands, products and experiences to reinvigorate customer interest and introduce shoppers to the new and the next

04

### Educated Confidence

Using hands-on workshops and immersive learning activities in-store to build confidence around purchases, optimize the ownership experience and offer ongoing support

02

### Third Space Connections

Creating communities that bring people together around the halo of a brand and offer new occasions to visit outside of the shopping trip

05

### Valued Attention

Transforming previously frustrating shopping moments into luxurious experiences that add value to a retail visit

03

### Integrated Wellness

Capitalizing on the continued growth of the wellness marketplace by making spa, fitness and healthy lifestyle experiences a core part of retail offerings

06

### Ambient Assistance

Utilizing IoT-enabled infrastructure and chat-based tools to provide shoppers and associates with access to always-on information, support and navigation assistance

09

### Frictionless Convenience

Using a mix of automation and expedited services to remove friction from in-store browsing, transactions and returns

07

### Synced Profiles

Designing log-in experiences within physical environments that trigger tailored service, recommendations and in-store activations, while simultaneously syncing customer experiences both on- and offline

10

### Networked Logistics

Transforming supply chains and logistics streams from linear to disintermediated models for immediate access and delivery at scale

08

### Intelligent Infrastructure

Approaching retail floors as data-rich environments to review behavior and feedback, as well as sales and merchandising strategies

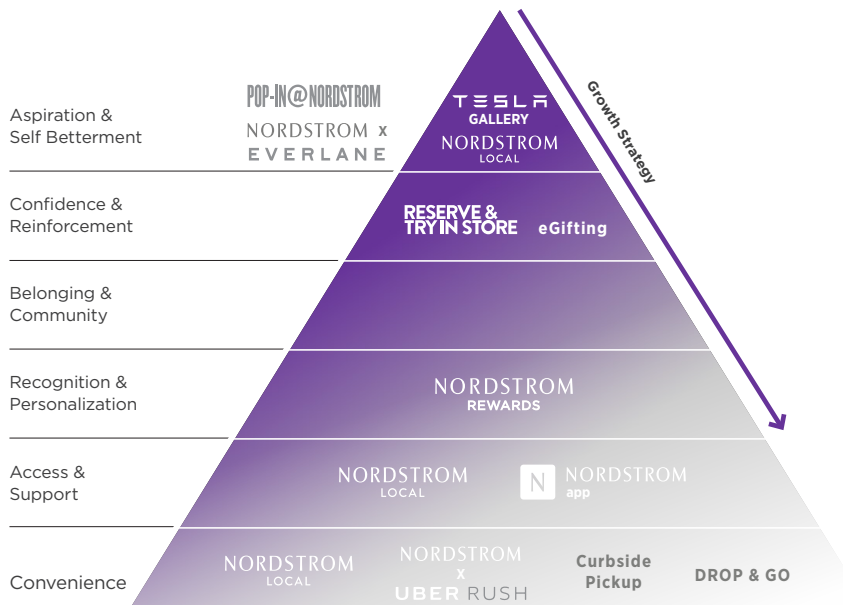
In the age of mobile Internet, the merging of online and offline [retail] is a trend. Consumers don't distinguish between online and offline as long as it fulfills their needs."

Jianzhen Peng, Secretary General, China Chain Store and Franchise Association

# Nordstrom: Underpinning The Shopper Experience With Data

*As department stores bear the brunt of retail industry shifts, high-fashion player Nordstrom is among the first and most efficient in blending hallmark stores with digital capabilities; the company now earns 26% of its sales online, while other industry players only earn about 18%.*

*At Nordstrom, digital has driven improvements in personalized experiences and efficient fulfillment, shoring up overall business growth and impacting brick-and-mortar strategy—driving the company to invest heavily in building a foundation of cross-channel integrations, and offering digitally-enhanced experiences that rely less on store infrastructure.*



## Nordstrom’s Core Drivers of Success:

- **Tailored** - A commitment to personalized service and styling drives Nordstrom to invest in systems that log and cater to each customer’s profile and preferences
- **VIP** - Democratized access to services such as curbside pickup and fitting room reservations make every consumer feel like the retailer’s top priority
- **Elegant** - To maintain a luxury shopping experience, tech integrations must work seamlessly and blend into the background
- **Curated** - Strategic pop-up partnerships with Goop, Tesla and new-luxury brands keep Nordstrom relevant and drive in-store traffic

“Shopping today may not always mean going to a store and looking at a vast amount of inventory.”

Shea Jensen, Senior Vice President of Customer Experience, Nordstrom

“It’s reasonable to assume that we could probably be doing half of our business online in the next five years.”

Peter Nordstrom, Co-President, Nordstrom

## Building A Digital Layer Beneath Brick And Mortar

### Aspiration & Self Betterment:

- Nordstrom Local locations offer in-store pampering to encourage holistic care and luxury
- Pop-In@Nordstrom rotating pop-ups introduce shoppers to brands that align with the new luxury lifestyle
- Tesla Gallery at Nordstrom aligns and introduces both brands to new audiences
- Nordstrom is an access point for online-only brands: Everlane, Black Tux

### Confidence & Reinforcement:

- Customers using Reserve & Try In Store can reserve products online to try on in-store; 80% of shoppers who tried the service have used it multiple times
- e-Gifting program allows recipients to choose whether to receive the item, exchange it for something else or take the value on a gift card

### Recognition & Personalization:

- Expanded Nordstrom Rewards loyalty program tracks shopper behavior and offers perks across in-store and online channels

### Access & Support:

- Nordstrom Local is a physical hub for placing online orders and making returns
- Nordstrom App allows shoppers to scan products in-store and order online for different sizes or colors

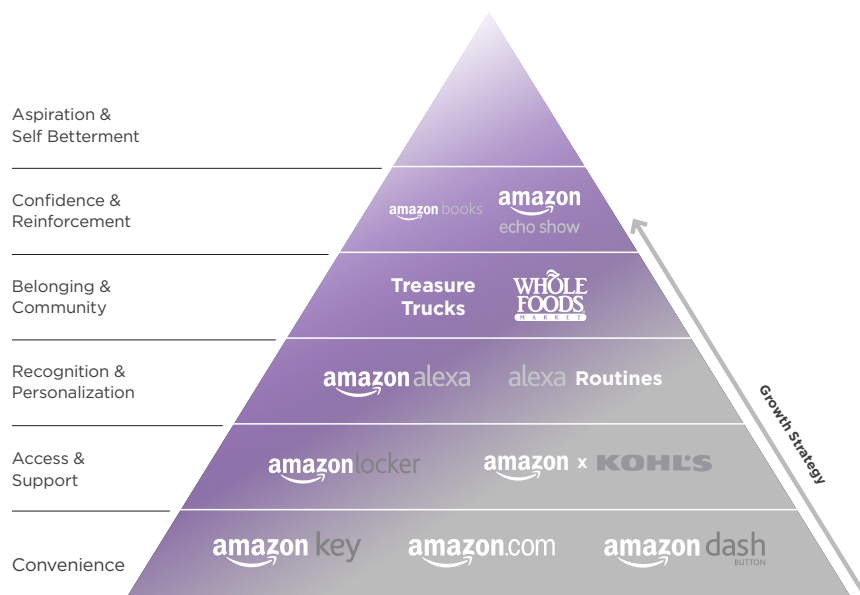
### Convenience:

- Nordstrom Local sources inventory from network of stores and delivers to customers same-day
- 24/7 Curbside Pickup at store locations for online orders during holiday season
- Nordstrom x UberRush partnership offers same-day delivery in cities
- Drop And Go service for returning online orders in-store

# Amazon: Building Experiences Atop A Digital Infrastructure

*By upending the purchase and delivery experience across most retail markets, U.S. e-commerce leader Amazon has solidified its position as the industry’s digital benchmark with a market value that exceeded \$450 billion and \$136 billion in revenue in 2016.<sup>54</sup>*

*While continuing to perfect its convenience core, Amazon has invested in offline experiences—Treasure Trucks, Amazon Bookstores, Amazon Go, and most notably, its acquisition of Whole Foods—that help the retailer to establish a tangible relationship with shoppers that encourages them to identify with the brand. Amazon’s relationship-building initiatives are supported by effective use of existing data-collection and logistical processes, while always driving back to their core sales channel, online.*



## Amazon’s Core Drivers of Success:

- **Seamless** - Prime memberships reduce friction to make shopping easy, integrated and even automated
- **Brandless** - With the shift to voice, the default becomes Amazon brands and preferred partners
- **Boundless** - Rapidly growing commerce and fulfillment ecosystem that runs across industry and product category
- **Relentless** - Constant innovations and acquisitions expand its reach and efficiency, but failures are embraced

## Other Players To Consider:

- Alibaba
- Casper
- Glossier
- Harry’s

## Evolving Into Offline Retail:

### Convenience:

- Amazon.com
- Amazon Dash replenishment buttons let users order specific items with the touch of a button or automatically replenishes them when they run out
- Amazon Key facilitates in-home deliveries of products and services

### Access & Support:

- The Amazon Experience allows customers to buy and return Amazon purchases at partner stores
- Amazon Lockers deliver orders to convenience stores, gyms and smaller retailers for those without a convenient home address

### Recognition & Personalization:

- Amazon Alexa AI-enabled device suite interacts with and learns from consumers in their homes
- Amazon Alexa Routines learns daily routines and schedules regular tasks and deliveries around them

### Belonging & Community:

- Whole Foods connects Amazon to an established community of wellness and sustainability-minded consumers
- Treasure Trucks deliver tailored deals while visiting regional communities

### Confidence & Reinforcement:

- Smart Home consultations help customers feel confident in their Amazon IoT purchases
- Amazon Echo Show offers reinforcement for consumers on their outfit selections
- Physical locations of Whole Foods and Amazon Bookstores allow customers to touch and trial products before purchase

# Adapting To The New Definitions Of Convenience

*Amazon Prime, third-party delivery and mobile wallets have all, in their own way, shifted the definition of retail convenience—creating different expectations for access, purchase and delivery based on the product, its use ease and the intersecting consumer touchpoint. Brands and retailers must understand convenience in the context of their products and services, or risk building systems that are more frustrating than they are helpful.*

## Time

- Implementing systems that save time during a visit (i.e. shorter checkout lines, easier try-on)
- Housing related purchases or processes in a central location to eliminate multiple trips
- Incorporating value-add services and tools that help individuals make the best use of their time during a visit

## Access

- Operating stores and platforms that shoppers can access any time to make and receive a purchase
- Tapping into fulfillment partners to offer a broader inventory of products that are just as easy for shoppers to acquire

## Anticipation

- Remembering shoppers' preferences and making informed recommendations of what they might like or need
- Maintaining a log of current household inventory, inferring future purchases and offering to arrange them on a consumer's behalf

## Proximity

- Positioning retail environments close by or offering services that make deliveries to (or within) an individual's home environment
- Garnering a hyperlocal understanding of a regional community and its specific product and service needs

## Synchronization

- Learning and working around a customer's lifestyle and routine
- Scheduling services to meet shoppers, rather than having them go out of their way (i.e. offering meal kits on the commute home from work)
- Understanding the needs and routines of multiple household members and working around them
- Proactively coordinating offers, services and drop-offs that simplify day-to-day living

# Key Technology Investments For Blended Retail

*Whether building experiences or connecting digital systems, today's retail evolution requires strategic investments in technology. PSFK's Future of Retail 2018 survey asked over 400 retail professionals to share their near- and long-term investment plans to gauge the pace of retail tech adoption—identifying first-mover opportunities and noting where others must catch up.*

“Retailers will succeed when they can add value at every touchpoint in the retail evolution, reach customers where they are and deliver on personalized experiences. Embracing the digital economy will be key to creating this vision.”

Jen Peel, Executive Director of Product Innovation, The Garrigan Lyman Group

## Top 10 Retail Technologies That Experts Are Investing In:

Source: PSFK Future of Retail 2018 Survey

<b>01</b>	<i>Personalization</i>	<b>06</b>	<i>Augmented Reality</i>
<b>02</b>	<i>AI &amp; Cognitive Softwares</i>	<b>07</b>	<i>IoT &amp; Sensors</i>
<b>03</b>	<i>Data Collection &amp; Analytics Tools</i>	<b>08</b>	<i>Voice</i>
<b>04</b>	<i>Mobile Website Experience</i>	<b>09</b>	<i>Robotics &amp; Automated Systems</i>
<b>05</b>	<i>Social Media Retail</i>	<b>10</b>	<i>Programmatic Advertising</i>

### Retail Investments For Today: Quick Win Initiatives

#### Opt-In Data Tracking

Survey respondents are prioritizing data tracking capabilities and technology. Because data collection is the backbone for 1:1 customization and large-scale analytics, this investment lays a functional foundation for modern and future personalization software.

#### Offline/Online Syncing

Customers' expectations for omni-channel shopping are driving retailers to offer seamless engagement and transactions across store, mobile and desktop—syncing profiles, inventory and account history.

#### Flexible Logistics

Shoppers' propensity to browse from one channel, buy at another and return to a third is forcing brands and retailers to implement adaptive fulfillment and return platforms that can meet customers at any location.

### Retail Planning For Tomorrow: Long-Term Opportunities

#### Biometric Recognition

Integrating biometric cues, such as facial or voice recognition, into offline retail will provide a more seamless system of recognizing regular shoppers, tracking their behavior and activating at their moment of intent.

#### In-Store Augmented Reality

As augmented reality software becomes increasingly available to every consumer through their mobile devices, retailers and brands can integrate AR into the customer journey to for specialized experiences, like adaptive pricing or product customization.

#### End-To-End Personalization

Although retailers can enable personalization at different points in the path to purchase now, the possibility of a fully personalized service customer journey will grow by combining data collection tools to seamlessly tailor content across their mobile, in-store, desktop and home experiences.



# 5 Retail Lessons For Creative Agencies

*As the playing field changes for retail clients, creative agencies can leverage their strengths and adopt new strategies to build more effective engagements. PSFK's Future of Retail 2018 Survey explores the new strategies for agency playing in retail: mobile and AI to offer convenience along the path to purchase, while experience building and personalization make retail special for every customer.*

## Adopt A Mobile-First Mentality

As sales from brick-and-mortar decline over the next few years, desktop as a proportion of revenue is poised to drop too. Help your clients divorce from the desktop website and adopt a mobile-first mentality that can more easily be synced to other technologies or in the store.

## Win Clients On The Customer

The PSFK Future of Retail 2018 Survey showed that, while consultancies focus on business needs, agencies are naturally more focused on understanding the customer. Use this customer-centricity to your advantage by rooting proposals and campaigns in helping brands align with a customer's lifestyle and aspirations.

## Get Cognitive

Read up on artificial intelligence and start recommending how to apply it along the purchase path as soon as possible. In PSFK's Future of Retail 2018 Survey, less than 14% of agencies prioritized cognitive computing investments compared to 24% of consultancies. Prioritize AI early to stay ahead of creative competition.

## Bonus: Remember The Time Horizon And Take It Step By Step

Remember that retailers and brands work at mass scale. New technologies garner excitement, but lag in boardroom adoption. Watch big ideas that fail to get impact, and consider incremental steps—such as forgoing a high-risk immersive experience for mixed-reality experiences that are easily accessible for consumers through mobile.

## Help Brands With IRL Surprise & Delight

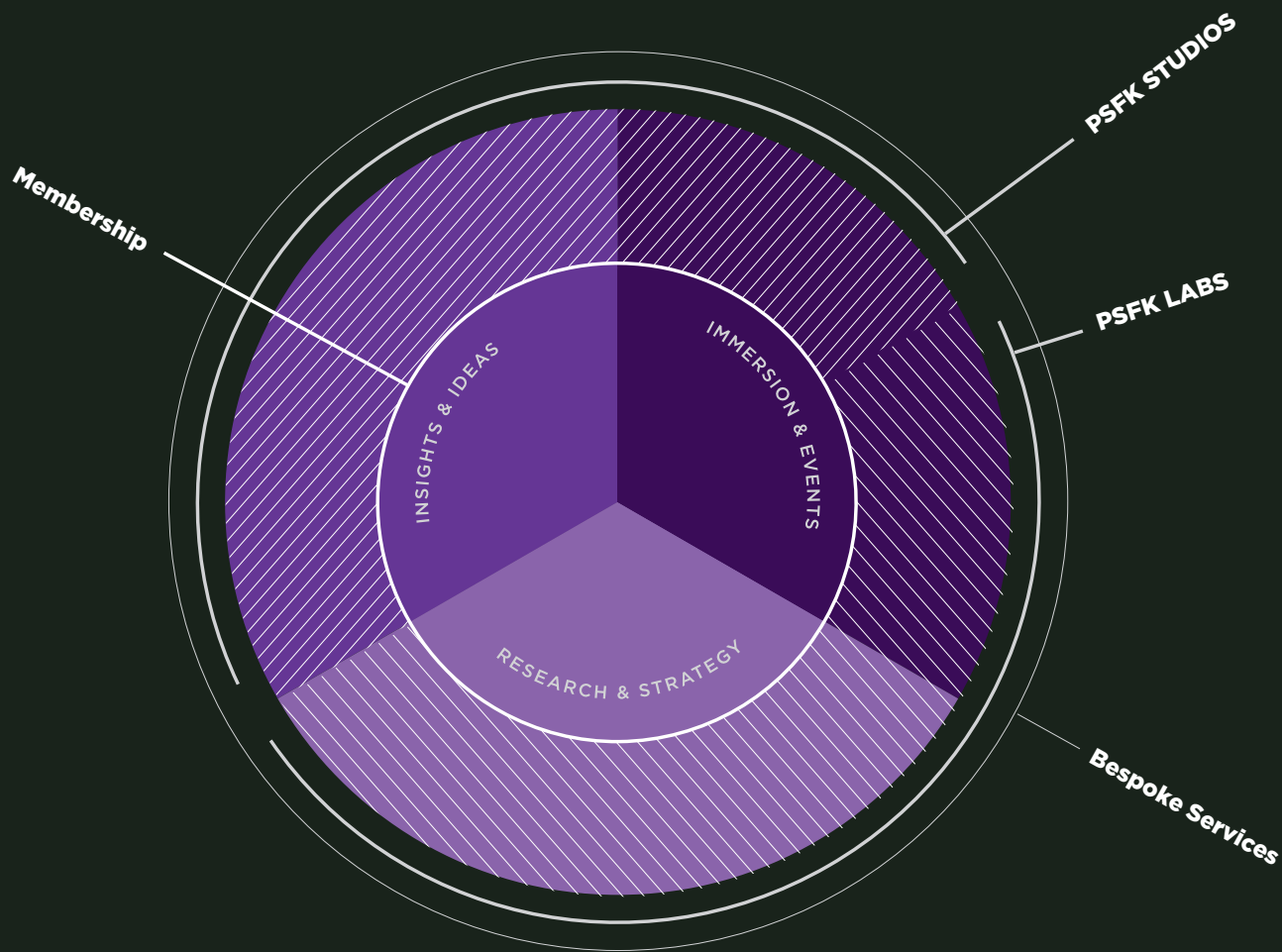
Brands understand that they need to provide more reasons for shoppers to engage with them; they want to build in-person experiences for shoppers, and agencies are the perfect creative and production partners. Help clients focus their experiential ideas by advising retailers on the best moments to create surprise and delight along the customer journey.

## We Need To Talk About Maria And Marley And Mika Too

If there's one thing agencies, brands, consultancies and retailers agree on, it's the importance of personalization. Customizing the shopper experience is the most critical strategy over the next few years, and agencies need to understand how to make every brand experience feel special so that customers are driven happily to purchase.

# About PSFK

*PSFK is the world's leading business intelligence platform for customer experience innovation. Across every industry vertical, we help the most progressive brands identify and leverage opportunities across retail, brand and product experience through a mix of trend reports, immersive events, insight-rich content and on-demand research & strategy services.*



## Membership Overview

PSFK provides a cultural intelligence service for brands and agencies:

- On-Demand Research
- Extensive Report Library
- Daily Feed Of Insights
- Weekly Vertical Newsletters
- Immersive Events

## Bespoke Services

Since 2007, our NYC based team has helped brands leverage emerging trends through a mix of consulting services.

### PSFK LABS

- Research & Strategy
- Concepting & Consumer Journeys
- Workshops & Trend Tours

### PSFK STUDIOS

- Branded Content
- Newsletters
- Partner Events

## Bring The Findings Of This Report To Life For Your Business

PSFK leverages its research findings, strategic recommendations and other conceptual work to develop 1-day workshop sessions. These sessions are structured as a collaborative discussion to present the team with research and encourage new and broader thinking. By the end of the session, we will identify at least 3 blue sky strategies and 8-12 quick win initiatives.

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## About The PSFK 2018 Retail Survey

The Future of Retail 2018 report includes insights collected from the PSFK 2018 Retail Survey, conducted in November 2017, in which over 400 retail, brand and agency professionals within the retail industry offered their perspectives on the future state of the industry and the convergence of offline and online retail. These perspectives informed quantitative and directional insights within this document.

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## Contact

For more information on our services:

### Membership

Jeff Weiner  
Jeff.Weiner@psfk.com

### Bespoke Services

Piers Fawkes  
Piers.Fawkes@psfk.com

### PSFK

42 Bond Street, 6th Floor  
New York, NY 10012 USA  
+1 646 520 4672

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## Team

### Project Lead

Adriana Krasniansky

### Strategy & Research

Conner Dial  
Avery McCaffrey  
Emily Wasik

### Design

Sasha Zwiebel  
Nini Lin

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Download the full report at: [psfk.com/Future-of-Retail](https://psfk.com/Future-of-Retail)

#FutureofRetail

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