

# Retail CEO's New Imperative: Winning the Omni-Channel Fulfillment War

We surveyed 410 CEOs in 8 markets.

## THE RESPONDENTS



36%  
HARD GOODS



23%  
SOFT GOODS



14%  
CPG



13%  
ECOMMERCE



12%  
GROCERY



1%  
OTHER

TOP 250 RETAILERS  
Revenue of \$5b+

22%



TOP 251 - 1,000 RETAILERS  
Revenue of \$250M - \$5b

51%



## THE RESULTS



71% OF CEOS SAY OMNI-CHANNEL FULFILLMENT IS A TOP PRIORITY



## CAN PROFITABLY DELIVER OMNI-CHANNEL DEMANDS

Retailers 16%

Top 250 Retailers 19%

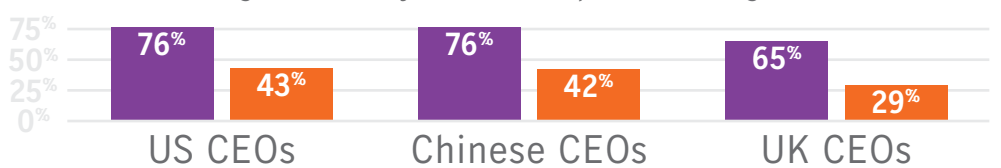
## Q: WHAT KEEPS RETAIL & CONSUMER GOODS CEOS UP AT NIGHT?

A: Online and traditional retail giants offering same-day, next-day delivery options

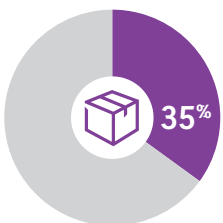


66%  
OF CEOS  
RANKED IT  
AS THE  
TOP THREAT

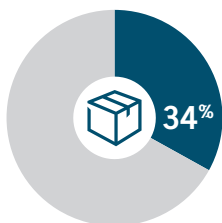
Agree Say it would impact their organization



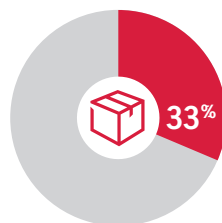
## TOP 3 INTERNAL THREATS



Failing to meet all of their customer expectations across multiple channels



Failing to re-engineer their business to align with the changing role of the store



Failing to manage costs of serving customers by fulfilling omni-channel expectations

33%  
Failing to re-engineer your business to align with the changing role of the store  
AUSTRALIA

63%  
Failing to break the silos and integrate physical stores with e-Commerce  
CHINA

47%  
Failing to maintain sales due to poor inventory visibility and out of stock management  
FRANCE

23%  
Failing to maintain sales due to poor inventory visibility and out of stock management  
GERMANY



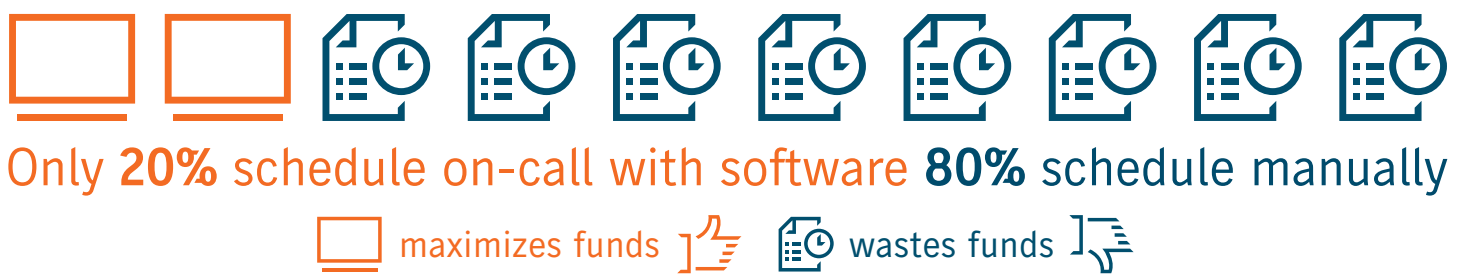
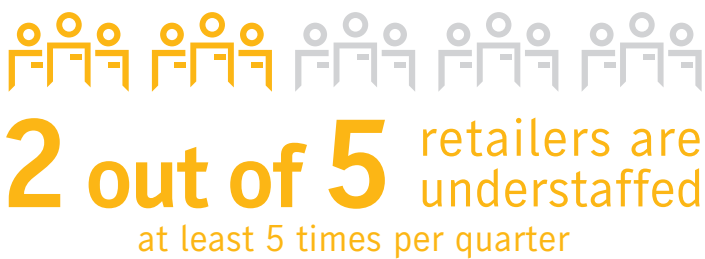
67% of CEOs agree that the costs to fulfill are increasing

# The perfect labor storm is brewing for retailers

Results from Voice of the Store Associate survey of 250+ U.S. store managers by JDA Software



## ON-CALL CONTROVERSY



## CLEAR SKIES AHEAD WITH BETTER WFM SOLUTIONS



# Black Friday: Boom or Bust?

Find out if you're poised to capitalize on retail's biggest day!



**50%**

of shoppers who experienced an issue with an online order during the year will not shop with that retailer during the holiday season!



**1 in 4 shoppers**

had an issue in the past 12 months!

## IS BOPIS HURTING YOU?

**60%** of those who buy online and pickup in-store (BOPIS) did so to avoid delivery charges



**1 in 2**

experienced an issue at pickup!



Are your delivery fees costing you customers?

## IMPORTANCE OF RETURNS



**88%**

say ease of returns is a key factor in where they shop

**62%**

say paying for return postage is their biggest frustration



**30%**

of online shoppers regularly order 2 or more of the same item and return the ones they don't want

## BLACK FRIDAY AND THE BOTTOM LINE



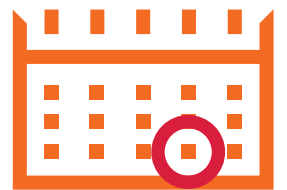
**57%**

say they'll take advantage of Black Friday deals this year



**11%**

up from last year



Black Friday shoppers say they will primarily shop at stores

**13%**



Black Friday shoppers say they will primarily shop online

**29%**



**58%** of online shoppers want their orders delivered to their homes—an expensive option for retailers



With 50% of disappointed shoppers avoiding them and expensive delivery costs, is hope for Black Friday success already over for some retailers?