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Omni-Channel Industry: The Changing Retail Model

Bernie Hogan, Senior Vice President, Emerging Capabilities and Industries, GS1 US, shares his views on this retail industry game-changer.



The global retail forum is about change. Actually, it's already changing.

As customers shop in stores, on Amazon and on their smartphones, the lines between online and offline shopping continue to blur. Consumers want what they want when they want it at the price they want, and they don't care how, or by which channel – phone, Internet, cash register – they buy it.

This is the very definition of omni-channel retailing: "providing an immersive and superior customer experience regardless of channel," according to IDC Retail Insights. Essentially, omni-channel retail focuses more on the customer than the channel of commerce.

Case in point: currently, 51 percent of consumers research online, and then visit stores to make their purchases, according to Ipsos OTX/Google. On the other hand, 44 percent both research and buy online. Thirty-two percent do product research

online, visit stores to examine the item, then go back online to buy it at competitive prices. Only 17 percent visit stores first, and buy online later.

Individually, each of these channels generate adequate sales. Together, the sales – and marketing – potential is incredible. Omni-channel shoppers spend up to 30 percent more than multi-channel shoppers and show stronger brand loyalty, says IDC Retail Insights.

That said, omni-channel retailing has global implications. As the exploding presence of smartphones and social media sites enhance network connectivity, customers are more knowledgeable about



merchandise, causing trading partners to intersect in different ways.

Take eBay.com and Amazon.com., for example. eBay alone has more than 100 million active buyers and sellers worldwide, with 300 million concurrent item listings in more than 50,000 categories, accessible through social media, other websites and apps. With interconnectivity like this, merchants of all sizes must reach buyers in new ways to keep up. In fact, traditional department store retailer Macy's has publicly and proactively embraced omni-channel commerce, even partnering with eBay and Amazon to sell products and

74% of consumers think it's important that product information is trustworthy. 35% would never use an app again if it had bad data.

enhance brand value. Terry Lundgren, Macy's CEO has said, "We are using technology in our stores to mirror the online shopping experience, and adding functionality and content online to provide customers with additional assistance in product selection."

In short, modern technology provides consumers with a consistent shopping experience, whether in a brick and mortar store or online.

So how do we embrace interconnectivity in an effective way to enhance efficiencies and improve customer service?

Our current setup doesn't support this inevitable, necessary move toward omni-channel retailing. Right now, we're focused primarily on B to C. But our new reality is B to B to C. Years of bad data, labour costs and risk (losing customers over dissatisfaction or missed opportunities), just doesn't work anymore. Point-to-point, proprietary solutions do not adequately support the omni-channel consumer's need for enhanced data and fulfillment. A scalable, repeatable, industry-wide solution for global partners is required. So how do we get there?

Enter GS1 Standards. GS1 Standards make it possible for companies to speak the same language and connect with each other by identifying, capturing, and sharing information about products, business locations, and more - across all channels and countries. Without these global standards, non-standardised solutions will emerge, threatening more bad data, loss of efficiency and confusion in the marketplace. If we don't proactively work with omni-channel platform providers like eBay and Amazon, they will develop their own ways to solve the problem.

When it comes to omni-channel retailing, there are three clear benefits of using GS1 Standards 1) consistent product identification across all channels using Global Trade Item

Numbers (GTINs); 2) enhanced, accurate product data, and 3) better inventory management.

As customers demand a simpler search process, GTINs support market needs to aggregate, store, and deliver data in a consumer-friendly way for online product search and discovery. In other words, your product – and accurate information about it – will show up across more commerce platforms; you can literally be everywhere your customers are.

More than half of consumers today research products online first, and then buy them in stores.

When it comes to enhanced product data, consumers want more choices in price and fulfillment. They need data they can trust, but most of the current digital information about products is incorrect. In fact, 74 percent of consumers consider it important that product information is trustworthy, and 35 percent would never use an app again if it contained incorrect product information.

Finally, GS1 Standards improve inventory management, a requirement for omni-channel retailing. Imagine buying a product online and two days later the company says that product is no longer available. You're now a very unhappy customer.

"Omni-channeling" is inevitable on the global scale, but it is also an opportunity. A unified and coordinated approach will be our strongest asset in that embrace. Let's not just adapt, let's lead.



The B to B to C "Ecosystem"



The Next Chapter for EPC-Enabled Item Level RFID

Below is an excerpt from an article written by Patrick Javick of GS1 US for Apparel Magazine, a leading business/technology trade publication for apparel manufacturers and retailers:



The most recent and significant change in the apparel industry is the shift among brands to move their deployments of item level tagging with Radio Frequency Identification (RFID) back to the point-of-manufacture. As the majority of apparel products are now being tagged at the source and not at the distribution centre, industry leaders expect to see this trend continue.

The main driver behind adoption and implementation of EPC-enabled item level RFID continues to be inventory accuracy, with up to 99 percent accuracy in inventory counts. RFID also creates 70 percent to 80 percent more efficiency in physical labour, from inbound and outbound receipt in warehouses to physical cycle counts in stores. For example, Lord & Taylor, a leading U.S. specialty-retail department store chain, achieved 75 percent labour savings on shoe scans and improved customer service through this tagging.

EPC-enabled item level RFID can improve inventory accuracy and labour savings by 70 to 80 percent.

Brand Authenticity

The next chapter for EPC-Enabled RFID focuses on loss prevention, as companies are able to track what walks out the door, paid and unpaid, and match that against point-of-sale data. Fixed RFID infrastructure has also improved tracking for high-value items such as jewellery. This supports brand authentication and helps mitigate counterfeiting.

Omni-Channel Retailing

With more brands using “omni-channel retailing,” EPC-enabled RFID tagging helps increase efficiencies and grow operations. U.S.-based Macy’s is a leader in this type of retailing, which aims to provide a consistent experience for customers whether they shop in the store, online, on a mobile device, or through a catalogue. EPC-enabled RFID enables retailers like Macy’s to gain supply chain visibility across their whole network of suppliers and distribution centres, not just one facility. It also improves customer service. For example, if an in-store customer is looking for an out-of-stock item, it’s up to the retailer to make sure that shirt gets delivered the next day – just as quickly as if the order was placed online.

The Future of Retailing

Senior executives are more aware of EPC-enabled RFID than they were six months ago, and this has opened up new opportunities for merchandising teams. As a result, retailers may begin asking for enhanced performance around item-level tagging. It’s up to the industry at this point to not only collaborate to define and harmonise those requirements across global players in the form of core standards; but also to adopt those standards to realise the full benefits of the technology.

To read the full story, visit here:

<http://apparel.edgl.com/tech-insights/The-Next-Chapter--for-EPC-Enabled-Item-Level-RFID85504>



Hong Kong-Based Companies Learn the Value of Track-and-Trace Capabilities

In the ever-changing supply chain landscape, end-to-end traceability enables visibility, addresses costly, dangerous recalls, and builds trust among consumers. A recent case study released by three Hong Kong companies shows how GS1 Standards can improve supply chain traceability.

More information:

http://www.gs1.org/docs/traceability/traceability_case_study_hongkong.pdf

Two out of three of these companies plan to further implement GS1 Standards to enhance traceability. Using the GS1 Global Traceability Assessment tool also helped them identify traceability gaps following costly recalls.

Learn more about the GS1 Global Traceability Programme:

<http://www.gs1.org/traceability/programme>



GS1 Global Traceability Assessment for Hong Kong Business Partners

The value of track-and-trace capabilities in the food & produce supply chain



**Transport & Logistics:
Achieving Visibility in Transport & Logistics**

Nowadays, many different actors may take part in the transport of goods between a seller and a buyer.

To optimise the management and reduce the costs of these complex global supply chains, shippers and logistic service providers need to be able to determine exactly where their shipments are at any given time. This helps ensure good – and timely – business decisions based on accurate, up-to-date information.

Discover how the GS1 System of standards provides true supply chain visibility and is delivering value to all transport and logistics processes, including:

- Shipping & Receiving
- Warehouse Management
- Transport Management
- Border Procedure Management (Customs)
- Asset Management

For more information:

- **Watch the video GS1 Standards in action in Transport Management:**

<http://www.youtube.com/watch?v=DTj94F13Mf0&feature=youtu.be>

- **Read the paper “Achieving Visibility in Transport & Logistics”:**

http://www.gs1.org/docs/transportlogistics/GS1_Achieving_Visibility_in_Transport_Logistics.pdf

- **Get inspired by the business cases and the value the GS1 Standards is delivering to industry:**

http://www.gs1.org/docs/transportlogistics/GS1_Delivering_Value_in_Receiving_and_Shipping.pdf



SAFETY

U.S. Government Agency Releases Food Safety Traceability Recommendations

The U.S. Food & Drug Administration is currently accepting comments on two new proposals for food safety legislation. GS1 will offer final recommendations in collaboration with other industry players.

In the United States, companies doing business in the food industry, especially in fresh food categories, are following with great interest the Food Safety Modernization Act (FSMA). FSMA was signed into law by President Obama on January 4, 2011 after an increase in consumers’ demand for accurate and complete information about the food products they consume, and the need to enhance traceability processes that can aide in the prompt and precise withdrawal of potentially harmful products from the supply chain. In order to develop traceability rules for the food industry, the Food and Drug Administration (FDA) contracted with the Institute of Food Technologists (IFT) to conduct several food tracing pilots with industry representatives. As a respected expert on traceability, GS1 US was also invited to participate on the pilot panel that set out to help IFT to make traceability recommendations to FDA, in support of FSMA.



On Monday, March 4th 2013, FDA announced the public release of IFT’s pilot report and

traceability recommendations on how to improve product tracing in a way that benefits all stakeholders: for regulators to minimise the effects of foodborne illness outbreaks earlier and for the food industry to respond to them quicker.

At this important step in the traceability rule-making process, several industry segments (produce, meat & poultry, seafood, dairy, deli and bakery, consumer packaged goods), trade associations, and individual organisations, are preparing comments for submission to the FDA on the IFT recommendations that include:

- Uniform record keeping requirements
- Support of industry-led traceability initiatives
- Reporting of Critical Tracking Events (CTEs) and Key Data Elements (KDEs) by food growers, manufacturers, processors, transporters, wholesalers, distributors, retailers, etc.
- Development of food tracing plans by all members of the food supply chain companies, and
- Creation of a standardised, structured, electronic mechanism to collect traceability data for food safety investigations

While these recommendations are important, they represent only one of several steps in the rule-making process. GS1 US is currently preparing formal comments to communicate its alignment with the recommendations that support product traceability processes based on unique identification and a standardised mechanism for capturing and sharing traceability data among trading partners.

Once FDA reviews the comments on the IFT recommendations, they will submit a report to Congress, which will initiate the creation of the proposed traceability regulations referenced in FSMA. At that time, GS1 US is likely to provide further input based on its extensive industry experience and knowledge about traceability processes that can be adopted by industry to the benefit of all stakeholders.

- **Read the IFT pilot report:**

<http://www.fda.gov/downloads/Food/GuidanceRegulation/UCM341810.pdf>

- **For more information, contact Angela Fernandez, Vice President, Retail/Consumer Packaged Goods, GS1 US:**

afernandez@gs1.us



The 2013 Global Food Safety Conference

Géraldine Lissalde-Bonnet, GS1 Public Policy Manager, reports from this year's conference in Barcelona, Spain.

Nearly 800 delegates from 53 countries descended on Barcelona, Spain in March for *The Consumer Goods Forum's Global Food Safety Conference* addressing "Food Safety in a Global Economy." I was there with several of my GS1 Global colleagues and representatives from GS1 in Europe, France, Sweden and the US.



From left to right, at our GS1 Booth: Geraldine Lissalde-Bonnet (Public Policy Manager - GS1 GO), Camille Dreyfuss (GS1 in Europe Coordinator - GS1 in Europe), Pierre Georget (CEO - GS1 FR), Diana Carrillo (Sustainability & B2C manager - GS1 FR).

Food Fraud and Visibility

Recent news that several food products sold in Britain contained horse meat instead of beef was a hot topic at the event. You could say that the issue of food fraud or "economically motivated adulteration," had come to the surface.

"We can do better – NO, we must do better"
- Michael R. Taylor, Deputy Commissioner for Food and Veterinary Medicine at the FDA on food safety and traceability.

"If you don't know what is in your product, you don't know whether it is safe," said Yves Rey, Corporate Quality General Manager for Danone, and chairperson of the Global Food Safety Initiative.

Re-tracing of the horse meat revealed that *nine* middlemen had handled the product, from the slaughterhouse to the consumer, said John Spink, Assistant Professor at the Anti-Counterfeiting and Product Protection Program of the Michigan State University's School of Criminal Justice. He stressed the need to understand where our food comes from. This is the basis for better visibility of our food supply, and for preventing foodborne illness. Food fraud also involves mislabeling, substitution, counterfeited products and contamination due to unapproved additions.

Food Safety and the GFSI

Food safety is a growing concern in regards to the 356 billion pounds of food consumed in a year in the U.S. alone (PulseNet). One in six Americans (about 48 million) get sick from contaminated food every year, and 3,000 of them die every year, according to the U.S. Centers for Disease Control (CDC).

The Global Food Safety Initiative (GFSI), an industry-wide collaboration among leading retailers, manufacturer and food-

service companies, has worked on better safety and product integrity since 2000.

The pre-conference GFSI stakeholder meeting asked a critical question: Just how successful has the Initiative been in improving food safety on the global level?

Some companies have managed to measure their success, but many lack a common, harmonised approach to data collection and trend analysis that can demonstrate GFSI's efficiency concretely. GFSI therefore launched an "efficiency study," which is expected to be completed by the end of 2013, and made public in February 2014. This study will continue to evaluate the continuous improvement of food safety management in global food industries on a yearly basis.

Food Safety and Public Policy

"We can do better – NO, we must do better," said Michael R. Taylor, Deputy Commissioner for Food and Veterinary Medicine at the Food and Drug Administration (FDA), in the session "New Public-Private regulatory paradigms for the 21st century."

For years, the U.S. FDA has advocated for global food safety. "Prevention must be the goal to protect both industry and consumers," said Taylor, referring to food recalls and outbreaks of foodborne illness.

This requires a shift in how we think of public policy – from a reactive to proactive, building strategies on science. The U.S. Food Safety Modernization Act (FSMA) was enacted to do just that – develop relevant tools to not only prevent, but act in real time.

Dr. Angelika Tritscher, of the World Health Organization, said at the "Reducing the Global Burden of Foodborne Disease" session, that factors such as global demographics, communications, climate change, economic loss, food security and healthy nutrition all have an impact on this issue. The key elements needed to strengthen food safety globally, according to Dr. Tritscher, include: strengthening food systems, a harmonised cross-industry approach, and an international commitment to reporting and minimising outbreaks.

Next year's Global Food Safety Conference, "One World, One Safe Food Supply" will be held in Anaheim, California, USA, February 26-28, 2014.

The need for Global Standards and Solutions To Combat Counterfeiting

In this new white paper, you will discover key emerging trends and best practices to secure global supply chains against the threat of counterfeit goods through greater visibility, traceability and transparency.

Read the paper:

http://www.gs1.org/docs/GS1_Anti-Counterfeiting_White_Paper.pdf



The Global Food Safety Initiative plans to complete a study on food safety and supply chain efficiencies by the end of 2013.



Cappgemini Publishes Report on Future of Standards



Consulting firm Cappgemini has released a report entitled: "The Future of Standards in the Consumer Goods & Retail Industry: Cut costs and meet new consumer needs." The report is both a strong endorsement of the existing value of standards in the retail sector and a call to make standards meet the needs of consumers.

"The Cappgemini research sheds light on an important issue: as an industry we need to put more work into making sure standards are well-adopted throughout our business networks. We are fortunate to have dynamic organisations like GS1 and The Consumer Goods Forum to help us with that," explained José Lopez, Executive Vice President, Operations & GLOBE, Nestlé.

A key theme for all interviewees was changing consumer behaviour. Executives are aware that the retail landscape is changing dramatically as consumers adopt new technology and that while existing standards provide a great foundation to meet the evolving retail model, new standards may also be needed. Specifically, they see challenges in:

- Providing product information across multiple channels
- Increasing consumer focus on product safety and recall
- Ensuring the quality of business-to-business and consumer-facing data

"Standards have a fascinating past and an exciting future. On the one hand, they are foundational to the way we do business, driving down the cost of our operations. On the other hand they are helping us to get closer to our consumers and meet their ever-changing needs, particularly in the digital world," commented Mike McNamara, Chief Information Officer, Tesco.

The report concludes with a set of 8 recommendations to support the future evolution of standards including

introducing simplified programmes to help users embrace and deploy standards while enabling provision of standardised product data to consumers.

Download the report:
http://www.gs1.org/future_of_standards

Collaborative Packaging Artwork: Improving design time, quality and efficiency

Creating artwork and copy for retail packing has its challenges. From keeping up with ever-changing government regulations, to multiple languages on a single pack, to manual copy/paste workflows – it is a process that is hampered by errors.

Manufacturers and artwork/print vendors need to exchange information relevant to a product's packaging. During development, information is passed back and forth between the various parties, as it is edited and refined. Only once the final version is approved can the print vendors begin production.

That is why a standard process and message flow was needed for managing packaging artwork content and communicating information between brands and studios. This collaborative packaging artwork solution has now been enabled by GS1 in the form of the GS1 XML Intelligent Packaging Standard.

Through the adoption and usage of GS1 Standards, there is an opportunity to reduce the time and cost of this process, while increasing data accuracy.



Find out more about the GS1 XML Intelligent Packaging Standard:
http://www.gs1.org/docs/ecom/GS1_Collaborative_Packaging_Artwork_brochure.pdf

GS1 Apparel, Fashion & Footwear Workshop Inspires Item Level EPC Tagging

Standards-based Radio Frequency Identification (RFID) is changing the way the apparel industry does business and will soon become as ubiquitous to the sector as the barcode is today. Leading retailers and brand owners from around the world are leveraging Electronic Product Code (EPC)-enabled RFID to manage their supply chains like never before.





This was the inspiration for the first-ever global GS1 Apparel, Fashion & Footwear Workshop which was held in March at the GS1 Standards Event in Dallas (TX), USA.

Over 50 participants representing retailers, brand owners, manufacturers, solution providers, and academia joined GS1 experts from around the globe in building awareness of the benefits of EPC-enabled RFID implementations and encouraging industry-wide collaboration through the

adoption and use of global standards.

Real-life EPC deployments were presented by retailers and brand owners. These industry leaders shared their companies' business cases and item-level tagging implementation "roadmaps."

Standards-based Radio Frequency Identification (RFID) will soon become as ubiquitous to the apparel industry as the barcode.

Presenters focused on:

- Use of EPC-RFID from supplier to retailer, enabling full inventory accuracy and Electronic Article Surveillance (EAS)
- Enabling maximum efficiency in multi-channel business models
- Upstream and downstream collaboration processes through enhanced visibility with Electronic Data Interchange (EDI)/ EPC Information Services Standard (EPCIS)
- Manufacturer/supplier education and support

The workshop concluded with a retailer store visit at the Galleria Dallas shopping mall, where participants witnessed first-hand a demo of RFID-use at the store level, and how it enables a better shopping experience for customers, while enhancing company-wide business processes.

For more information, contact Enzo Blonk, EPC Director, GS1 Global:

enzo.blonk@gs1.org

GS1 Joins Industry in EU Privacy Standardisation Debate

At the end of last year, GS1 joined the Industry Coalition on Data Protection (ICDP), a group of over 15 trade associations representing a broad spectrum of European, American and Asian businesses - including Internet service providers, ICT manufacturers, and online publishers/advertisers - to engage more effectively in the debate on the reform of the EU privacy legislation.

The European Parliament and Council are currently reviewing proposals for new, standards-based privacy legislation.

The central proposal for EU privacy legislation aims to create a single set of privacy standards for use in the EU's 27 countries. This new set of standards would override the often divergent national rules and represent a major effort to bring the existing EU framework - which dates back to 1995 - up to speed with today's Internet economy. Currently, this legislative proposal is under discussion in the European Parliament and the Council.

After the EU Parliament Plenary completes the first reading of the proposal in May, the proposal will then be examined by the Council of the EU - with Member States represented through their relevant Ministries. If the two institutions agree on a common text, the new regulation will be adopted. Otherwise, a second reading will be necessary, at the end of which the final legislation will be approved or rejected if there is no agreement.

Commissioner Viviane Reding has demonstrated a strong commitment to see the reform approved by the end of her term of office (mid-2014).



The two key points on which GS1 focused its contribution to the debate include the following: a) how unique identifiers are treated in the definition of personal (and personally identifiable) data, and b) what the newly introduced Data Protection Impact Assessment will look like, and how Privacy by Design will be defined.

This reform of the EU data protection legislation is a complex and lengthy process, with much at stake for industry and society as a whole. GS1 will continue to play an active role in this ongoing debate.

Unified Fresh Foods Industry Takes Unified Standards to the Fish Sector



One-third of the world's fish is incorrectly identified, according to a recent report by Oceana, an international organisation focused on seafood conservation. In the U.S. alone, DNA testing found seafood fraud in all states, with rates as high as 52 percent in California. Sushi restaurants had the most instances at 74 percent, followed by non-sushi restaurants at 38 percent and grocery stores at 18 percent.

One-third of the world's fish is mislabeled, according to Oceana

In the wake of increased seafood mislabeling, the GS1 Fresh Foods Industry Group is expanding its scope to the fish sector to enhance identification and traceability. If you are interested in participating in this new Working Group to help develop and deliver implementation guides to improve supply chain efficiencies in the fish sector, please contact your local GS1 Member Organisation at: www.gs1.org/contact.

Outside of food fraud – food waste, recalls and outbreaks account for 1.3 billion tons of lost food and countless costs, according to the United Nations' Food and Agriculture Organization (FAO). These mistakes also sicken more than 75 million people a year, according to the U.S. Centers for Disease Control and Protection (CDC). As consumers demand to know more about their food, where it comes from and if

it is safe, retailers and brands will require access to better product information.

Leading food producers, retail suppliers, end-users, trade associations and others are collaborating through the GS1 Fresh Foods Industry Group to develop a unified standards-based approach for improving item-level identification, product information, supply chain visibility and data synchronisation. This will, in turn, enhance food safety, traceability and business processes across all sectors of the fresh food industry, not just the fish sector. Current projects also include the development of a Master Data Implementation Guide for the fruit and vegetable sector as well as guidelines for data synchronisation.

EU Regulation pushes food information online

In November 2011, the European Union (EU) published a new food information regulation, which will take effect in December 2014. The goal of this regulation is to ensure that consumers have access to the information they need.

Companies need to start planning now to meet the EU's new requirements for food information, taking effect in December 2014.

As well as changes to on-pack labeling, the regulation sets out new requirements for information that should be provided to the consumer before they purchase food online. If the pre-purchase information is not available, the pre-packed food cannot be sold on a website.



This places a clear responsibility on those involved in the food supply chain to make the same information that is available on the physical package also available to the consumer when they buy online. So companies need to start planning now if their information is to be available by December 2014.

GS1 is helping industry to meet these regulation requirements by making digital product information easy to share. We've developed the GS1 Source framework so that:

- Brand owners can share relevant product information easily, thus building trust with consumers
- Online retailers can ensure they are delivering authentic data

- Consumers can feel confident that the digital product information they access is accurate, no matter how or where they engage with products

The framework is already being piloted in a number of EU countries and will become fully operational by the end of 2013.

More information about sharing your product information via GS1 Source:

<http://www.gs1.org/source>

More information about the EU Food Information Regulation:

http://www.gs1.org/docs/b2c/EU_Regulation_1-pager.pdf

SAVE THE DATE!

ECR Europe Forum & Marketplace 2013

Date: 14 May 2013 - 15 May 2013
Brussels, Belgium

View website:

<http://www.ecreuropeforum.net>

TCGF Global Summit 2013

Date: 12 Jun 2013 - 14 Jun 2013
Tokyo, Japan

View website:

<http://tcgfsummit.com/>

GS1 Connect Conference 2013

Date: 10 Jun 2013 - 13 Jun 2013
San Antonio (TX), United States

View website:

<http://usconnect.gs1us.org>

RFID Journal LIVE! Europe 2013

Date: 15 Oct 2013
London, United Kingdom

View website:

<http://www.rfidjournalevents.com/uk/>



For more information about any of these events, contact your local GS1 Member Organisation: www.gs1.org/contact

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