



1

Today

Today
Don't believe everything you read



FANTASY FOOTBALL
LAST CHANCE TO ENTER
£150,000 TO BE WON
PICK YOUR TEAM TODAY 58

FILM ON FRIDAY
WEEPIE WITH
A TWIST
PAGE 29

The Daily Telegraph
BRITAIN'S BEST-SELLING QUALITY DAILY

Friday, August 14, 2008

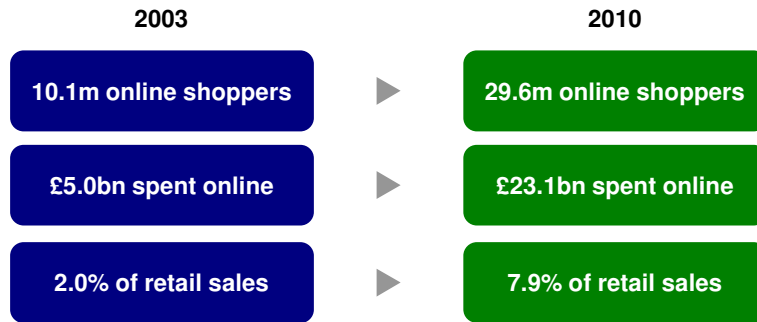
Shops to disappear in 10 years

4.7 million
The number of people aged 65+ is set to rise to 4.7 million by 2025

Misterton **Is this really what we want at London 2012?** **Sad, misterton's near**

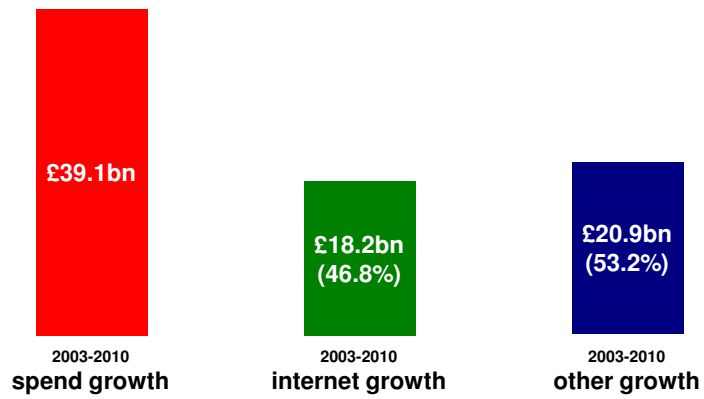


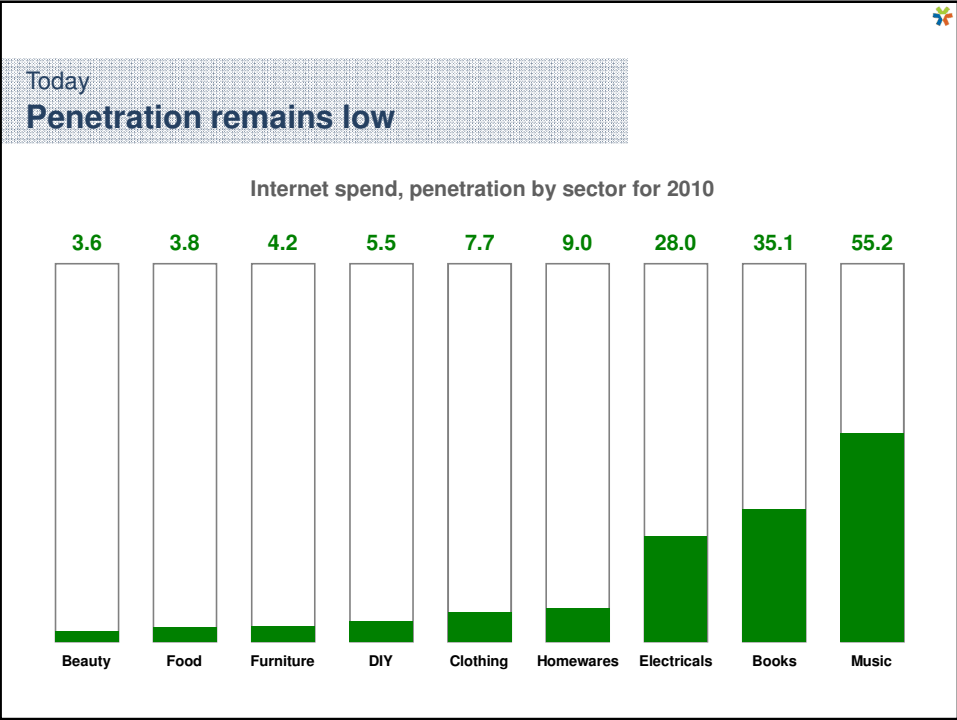
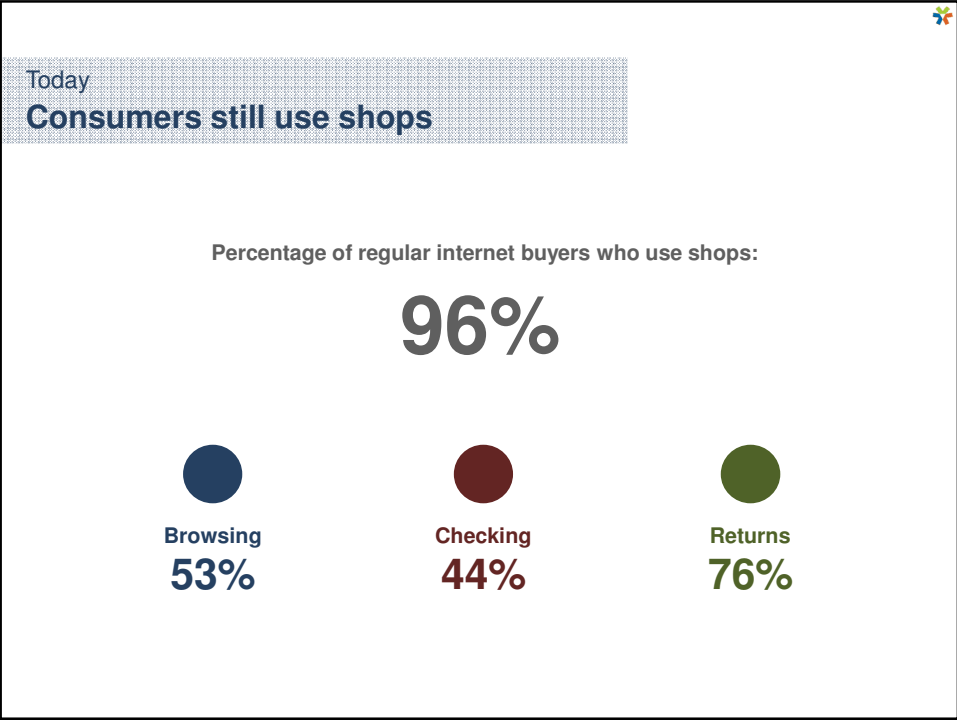
Today
We've come a long way



Today
But physical still grew

Retail spend cash growth over 2003-2010

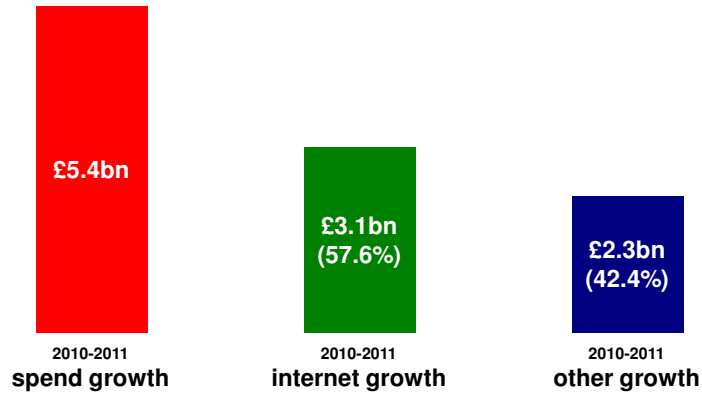






Today
The balance is tipping

Retail spend cash growth over 2010-2011



Today
The perfect storm

Retail spend cash growth over 2010-2011



**Rest of retail
-£3.2bn**



Today
Uneven impact



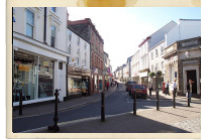
Swindon

-4.4%



Marlborough

-0.2%



Bodmin

-6.9%



Fowey

+2.3%

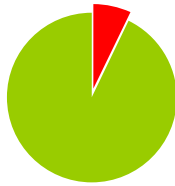


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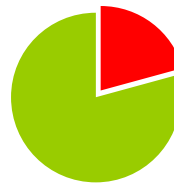
Tomorrow

Tomorrow
Growing share

2010
 7.9% of all retail spend
 (£23.1bn)



2020
 20.4% of all retail spend
 (£63.2bn)

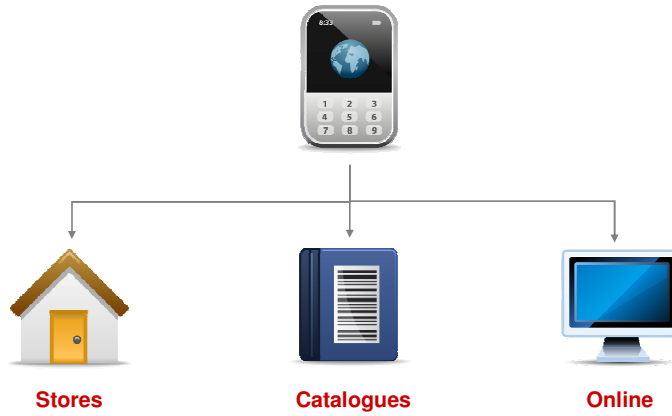


Tomorrow
Growth pattern

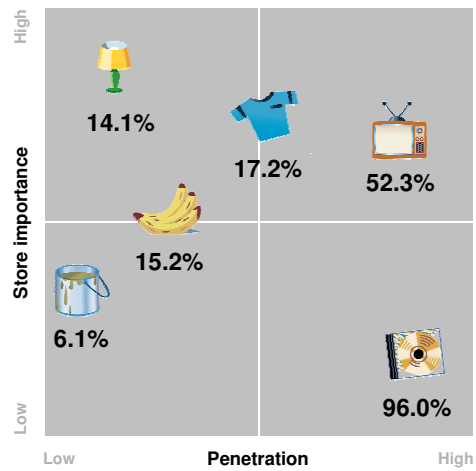
Online spending and growth rates 2010-2020



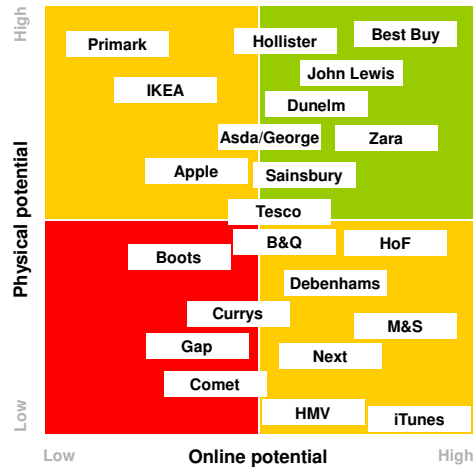
Tomorrow
The rise of mobile



Tomorrow
The sector view



Tomorrow
The retailer view



3

Implications



Implications

Less space, fewer stores

Shop floorspace

2010: 559m sq ft

2020: 527m sq ft

-6% over next ten years

Shop numbers

2010: 246,614

2020: 221,879

-10% over next ten years



Implications

Understanding the role

Physical

92.9%

Online

70.7%

Catalogue

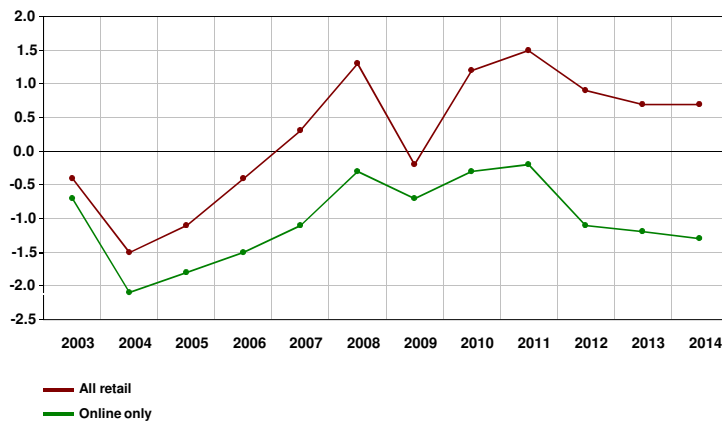
53.9%

Implications
Loss of power



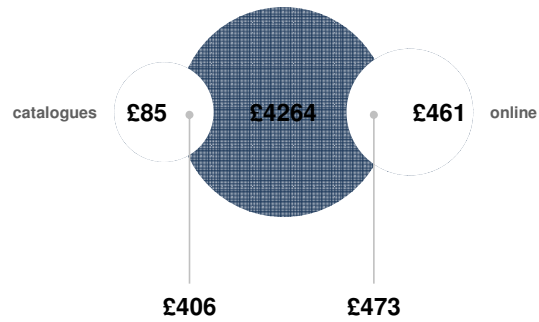
Implications
Price pressure

Overall rates of inflation in retail on and offline





Implications
Multichannel imperative



Cross channel consumers are **33.4%** more valuable to retailers



Implications
Retailer actions

Purpose

What does this do for me?

Holistic

How does it integrate?

Understand

How can I get a single view?

Selective

What should I back?

Culture

How do I unify my business?

