

Window On The Retail Apocalypse

June 20, 2018



Key questions facing the retail industry

- How quickly will in-store retail jobs disappear and what types of jobs will replace them?
- What factors may cause the transition from brick and mortar to e-commerce to accelerate?
- What strategies should retail firms adopt to provide more value to customers and successfully adapt to an omnichannel world?



Today's Presenters



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The “old and new” retail sectors consist of five industry groups

Old

- 1) Other non-store retailing
- 2) In-store retail

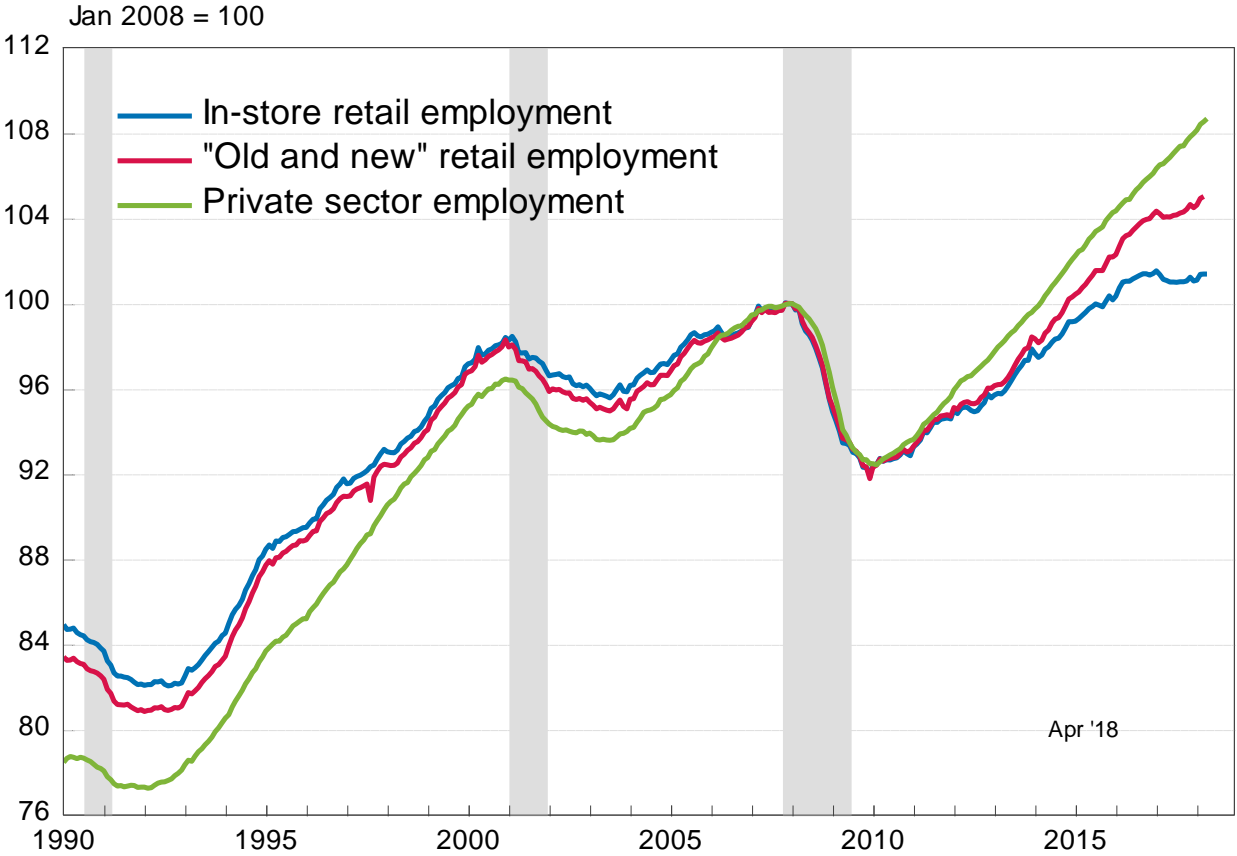
New

- 1) Couriers and messengers
- 2) Warehousing and storage
- 3) Electronic shopping and mail order houses

Source: Brian Schaitkin, *Retail Apocalypse Postponed Not Cancelled*, The Conference Board (<https://www.conference-board.org/blog/postdetail.cfm?post=6766&blogid=7>)



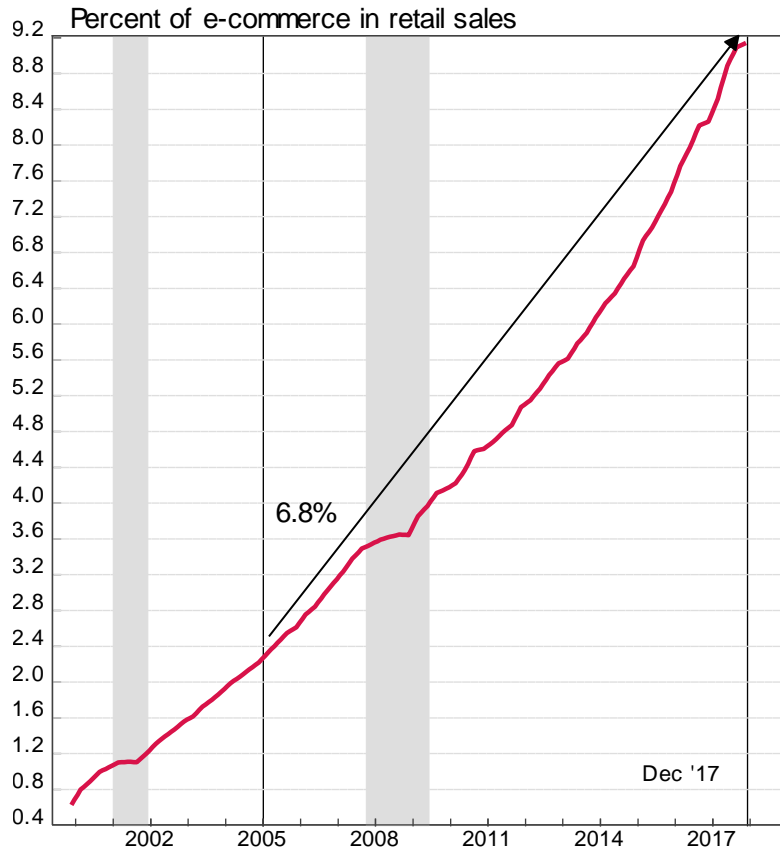
Employment growth in the “old and new” retail sector has stalled during the past year



Source: Brian Schaitkin, *Retail Apocalypse Postponed Not Cancelled*, The Conference Board (<https://www.conference-board.org/blog/postdetail.cfm?post=6766&blogid=7>)



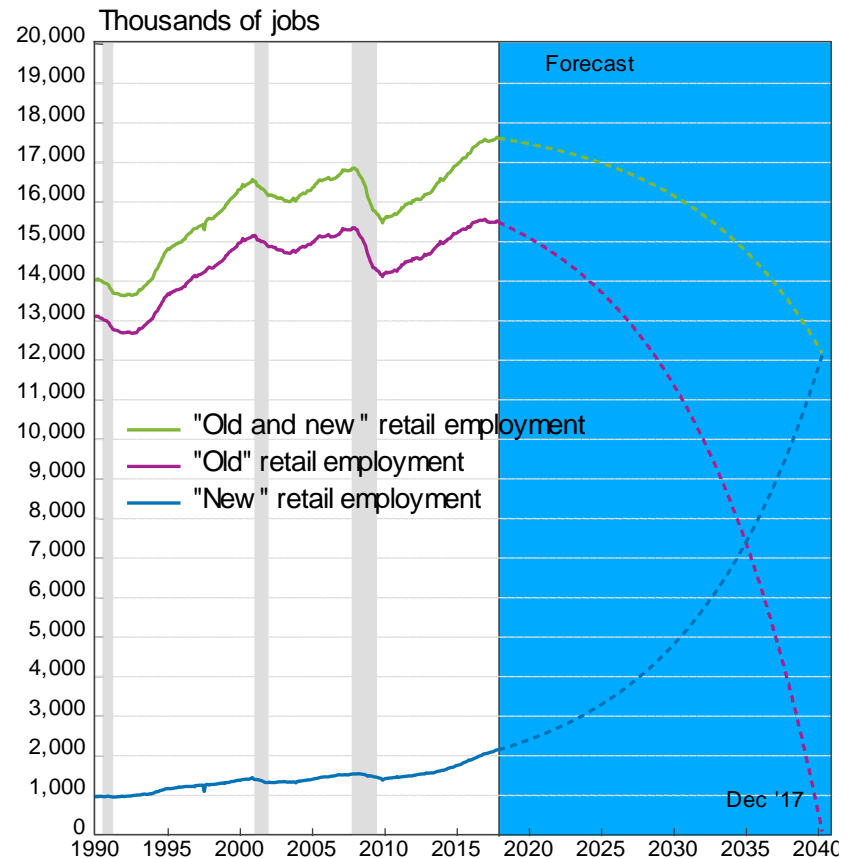
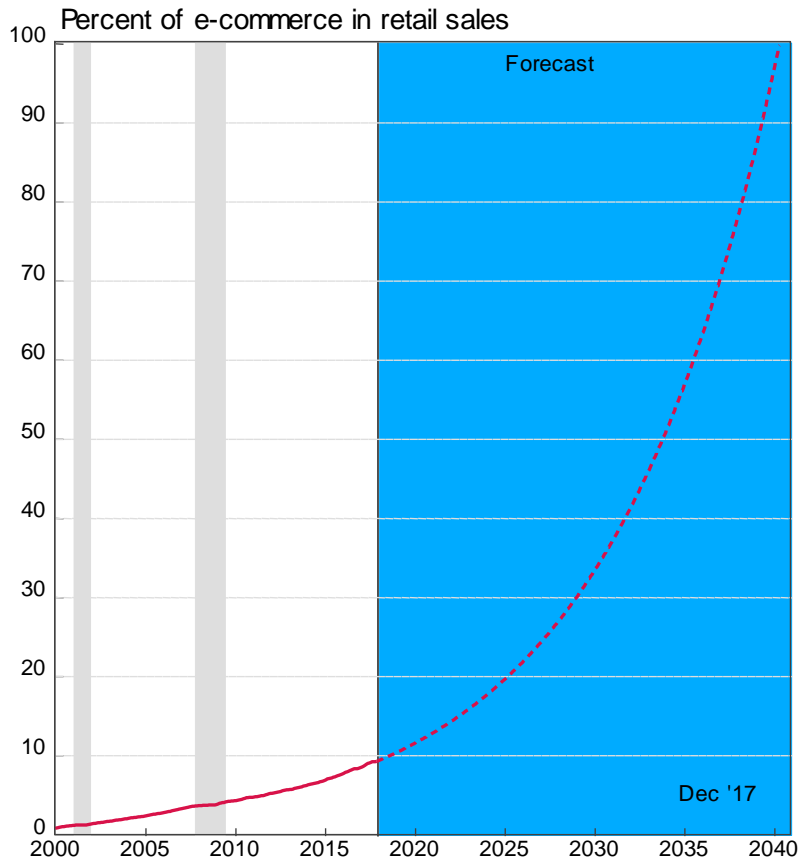
“New” retail created 749k jobs during that period and the share of e-commerce has quadrupled since 2005



Source: Brian Schaitkin, *Retail Apocalypse Postponed Not Cancelled*, The Conference Board (<https://www.conference-board.org/blog/postdetail.cfm?post=6766&blogid=7>)



In the “Apocalypse is Ongoing” scenario, ecommerce quadruples in share every 13 years through 2040



Source: Brian Schaitkin, *Retail Apocalypse Postponed Not Cancelled*, The Conference Board (<https://www.conference-board.org/blog/postdetail.cfm?post=6766&blogid=7>)



Network effects suggest that the apocalypse may arrive even faster

1. Faster productivity gains
2. Innovative frontier firms in e-commerce
3. Network effects create tipping point sector-by-sector and across economy in favor of e-commerce



Feedback? Suggestions? How Can We Help You?

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*Wednesday July 15th, 11.00-12.00 Eastern / 17.00-18.00 Brussels:
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Do you have suggestions for future topics? Please feel free to contact Bart van Ark at: bart.vanark@conference-board.org

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