ADAPT OR FAIL

MEETING CUSTOMER NEEDS IN THE NOW

A 2021 consumer research whitepaper by
K3 Business Technologies

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ADAPT OR FAIL: MEETING CUSTOMER NEEDS IN THE NOW

In just twelve months the retail sector has changed beyond recognition. Online retail spend rose from 20% of all sales in January 2020 to 36% in November 2020 as the pandemic reshaped our buying behaviour. High street stalwarts such as Topshop and Debenhams went under while independent stores innovated to maintain sales or raise funds during repeated lockdowns. This has caused media, analysts and retailers themselves to speculate on the future of the sector. However, focusing too much on the future can be detrimental.

Retail is an industry constantly in flux.

Everything from the way payments are taken, to how and when people shop, can change overnight.

While the last year has delivered extraordinary conditions, they have only reinforced the fact that retail is constantly evolving. **To be successful, retailers need to focus less on an uncertain future and more on meeting the needs of their customers in the now.**

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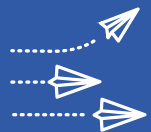
BEING READY FOR THE NOW

Consumers can be fickle. That creates a huge challenge, even without a global pandemic shifting buying behaviour. Retailers must fully understand the wants and needs of shoppers now, in order to meet their demands and ultimately survive in the future.

In fact, **a third of consumers (33%) would stop using a retailer who didn't offer the services they want to see in 2021.** Failure to listen to shoppers' needs is high risk in an environment where no retailer can afford to lose customers.

This research by K3 Business Technologies explores what retailers need to get right to retain customers, drive loyalty and increase sales – now. It considers issues from customer service to technology and how these must be adapted to help retailers survive. More than 2,000 UK consumers were surveyed to generate insight into three key areas:

MEETING CUSTOMERS IN THE NOW

- Getting to grips with exactly what customers want

GETTING RETAILERS READY FOR THE NOW

- Understanding the gaps between what customers want and what retailers are offering

USING TECHNOLOGY THAT SERVES THE NOW

- Using a simple, safe and adaptable technology stack to keep pace with changing customers' needs

METHODOLOGY

The survey was conducted among 2,004 consumers in the UK. The interviews were overseen by Sapio Research in December 2020 using an email invitation and online survey.

CONTRIBUTORS
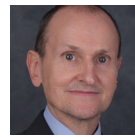
Prof. Dr. Phil Klaus
Leading global CX Strategist and Advisor

Dr. Kerli Kant Hvass
Circular Economy Researcher and Consultant

Andy Howell
Global Marketing Director
K3 Business Technologies

A third of consumers

33%

would stop using a retailer for not offering the services they want to see in 2021.

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KEY FINDINGS

+50% More than half of consumers have tried new online events, web consultations and DIY kits.

56% of city dwellers surveyed are considering moving abroad, or somewhere more rural.
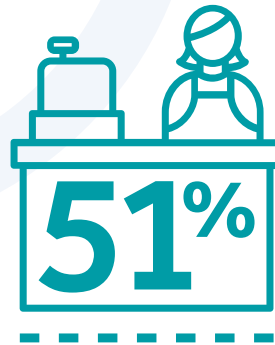
51% of customers wish to avoid interactions with store assistants.

In the last year, **30%** of customers have boycotted a retailer due to lack of environmental awareness.

56% of consumers have relied on Amazon more since the start of the pandemic, with convenience cited as the main reason.

Nearly half of consumers want to see more circular solutions such as product repairs, upcycling initiatives, second-hand goods or renting and leasing services.

MEETING CUSTOMERS WHERE THEY ARE NOW

CONVENIENCE IS KING

We now live in a world where we can order anything and have it delivered within hours. Just a decade ago this would have been unthinkable. Amazon has raised the bar when it comes to providing a frictionless shopping experience. Unsurprisingly, **56% of consumers have used Amazon more since the start of the pandemic, with convenience cited as the main reason.**

In today's rapidly changing market, retailers may think they need to throw time and effort into developing gimmicks intended to 'surprise and delight' customers. However, Prof. Dr. Phil Klaus, leading global Customer Experience Strategist, says *"We make most of our choices based on, first and foremost, who upsets us, not who delights us.* So, before you throw all your budget and time into delighting customers, first ask them 'What needs fixing?' Then, fix it."*

The message from shoppers is clear; **to avoid negative customer experiences and retain their business, retailers must get convenience right.** But how can other retailers follow Amazon's lead without its resources?

The key is pinpointing exactly what needs fixing. Retailers must take time to understand what drives the shopper away and how to innovate to prevent it.

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Over half of consumers have used Amazon more since the start of the pandemic (56%).

Have you used Amazon more or less since the start of the COVID-19 pandemic?

I don't use Amazon	3%
Much less	3%
Slightly less	4%
The same amount	34%
Slightly more	31%
Much more	25%
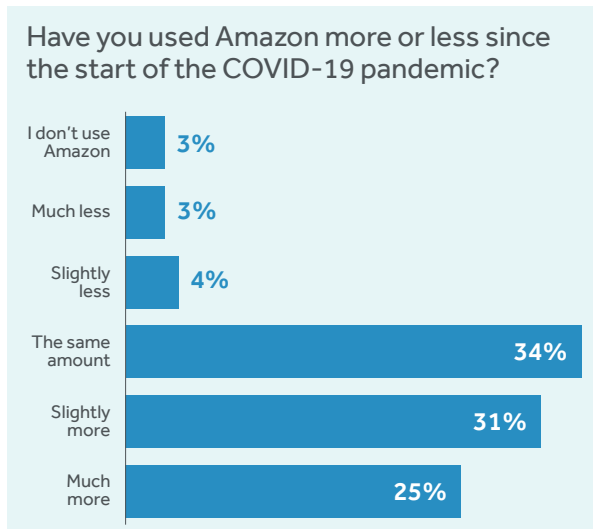
44% of those who have used Amazon more since the pandemic, have done so out of convenience.

What has increased your use of Amazon since the start of the pandemic?

Its convenience	44%
Its reliability of service	21%
Its speed	16%
Its competitive prices	13%
Its intuitive service	6%
Other	1%
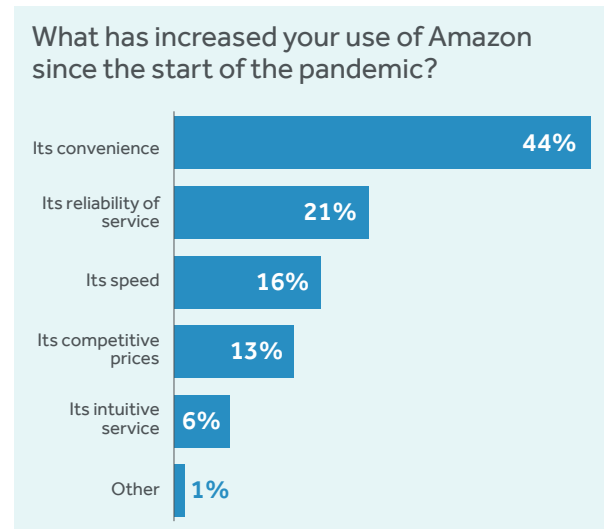
"We make most of our choices based on, first and foremost, who upsets us, not who delights us.

Prof. Dr. Phil Klaus
Customer Experience Strategist

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FIX WHAT NEEDS FIXING

To help retailers navigate the complexities of convenience, we explored the frustrations that cause shoppers to abandon a physical or online store. Price is still a huge factor when it comes to customer expectation and **43% would avoid shopping with a retailer if they believed it overcharged for items.** However, this doesn't necessitate a race to the bottom on price. There are other factors at play.

Price and poor customer service are overall the most influential deterrents, but these considerations change significantly by demographic. **Over 65s skew much higher when it comes to the impact of overcharging and poor customer service;** 55% and 50% respectively gave these as reasons to abandon a store. Our research also discovered an increasing opportunity to impress with ethical practices among the 18-24 demographic, who are less concerned about price, but more likely to abandon a retailer on ethical grounds.
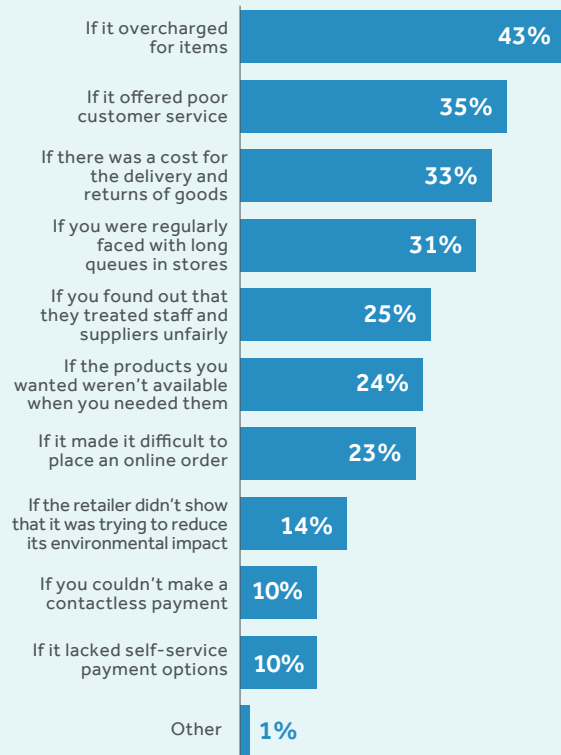
For shoppers under 65, convenience factors have a much more powerful impact. These customers have become so accustomed to convenience that they won't tolerate anything that interrupts a seamless shopping experience. **Costly deliveries and returns (33%), difficulty in placing orders online (25%), or items being out of stock (24%) are no longer mere annoyances.** They are now disincentives that will cause customers to actively avoid a retailer.

Convenience isn't just an online issue. **The top in-store frustration is long queues (31%). Whether online or instore, customers expect an experience that fits seamlessly around their busy lives.** Retailers who get it wrong risk losing customers to those that get it right. No brand is immune; the downfall of Topshop shows us that even retail giants can fail if they don't keep pace with their customers.

31% would avoid shopping with a retailer when faced with long queues. A quarter would do so if they discovered the company mistreated staff and suppliers (25%).

What is most likely to make you avoid shopping with a retailer?

If it overcharged for items	43%
If it offered poor customer service	35%
If there was a cost for the delivery and returns of goods	33%
If you were regularly faced with long queues in stores	31%
If you found out that they treated staff and suppliers unfairly	25%
If the products you wanted weren't available when you needed them	24%
If it made it difficult to place an online order	23%
If the retailer didn't show that it was trying to reduce its environmental impact	14%
If you couldn't make a contactless payment	10%
If it lacked self-service payment options	10%
Other	1%

Respondents were asked to select three

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HUMAN CONTACT MAY BE A THING OF THE PAST

In the past, human connection lay at the heart of the in-store shopping experience. But times have changed; today, shoppers are keen to avoid store assistants in favour of a more autonomous shopping experience.

More than half of shoppers surveyed avoid interaction with staff when visiting a store (51%). Shoppers in Wales and London are the most likely to avoid contact with staff, with 61% and 60% respectively preferring an interaction-free experience.

51% don't want any interactions with human staff when visiting a store.

Do you avoid interactions with staff when you visit a physical store?

Yes
51%

No
49%
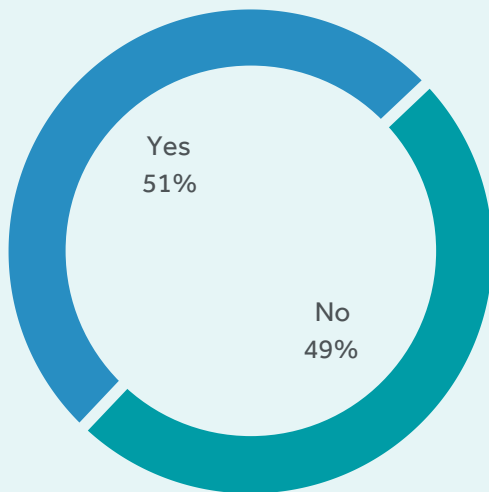
There is no doubt that COVID-19 has accelerated a trend towards minimal contact experiences. However, it is unlikely that we'll see this preference reverse post lockdown. There are other factors driving this shift.

We have already seen that long queues are a core frustration for shoppers. Therefore, it is no surprise that **2 in 5 people (41%) would like to see more self-service tills introduced.** In fact, one in ten shoppers would completely avoid a retailer if they didn't have self-service options. But this is just the tip of the iceberg.
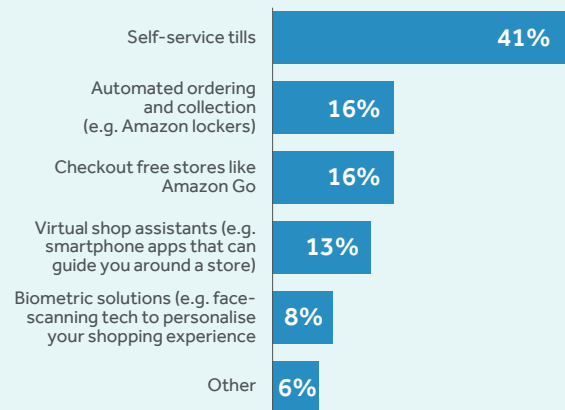
There are many ways in which customers want self-service to be delivered. **16% of shoppers want the introduction of checkout-free stores** like Amazon Go. The same percentage would most like to see automated ordering and collection - a model popularised by Amazon's click and collect lockers. More than one in ten shoppers (13%) demand virtual shop assistants to guide them around stores. A further 8% of shoppers' first preference is for biometric technology like face scanning to unlock a more personalised shopping experience.

Many retailers will look at these findings and focus on implementing self-service options to reduce human interaction. However, self-service is only part of the shift in how people want to shop; they are looking for a wider digital overhaul of bricks and mortar stores.

At its core, we are witnessing a demand for a seamless, convenient shopping experience across all channels. Retailers need to bring all the functionality of online to real-world retail. The in-store experience needs to be digitised, integrating loyalty, concierge, merchandising and payments into one mobile-based experience. This is the key to alleviating shopper pain points and delivering the smarter experiences that customers demand.

2 in 5 would like to see self-service tills introduced by more retailers (41%).

Which of the following self-service tech that reduces human contact in stores would you most like to see from a retailer?

Category	Percentage
Self-service tills	41%
Automated ordering and collection (e.g. Amazon lockers)	16%
Checkout free stores like Amazon Go	16%
Virtual shop assistants (e.g. smartphone apps that can guide you around a store)	13%
Biometric solutions (e.g. face-scanning tech to personalise your shopping experience	8%
Other	6%

THE ROLE OF THE STORE ASSISTANT IS CHANGING

Retailers are facing a paradox: more than half of people don't want any human interaction in stores, but customer service is still a leading consideration for shoppers. This begs the question of how to deliver 'good' customer service in the now.

Poor customer service is the second most deadly disincentive (35%), and forms part of the explanation as to why customers wish to shop autonomously. While self-service is a critical tool to address this in the short-term, we also need to consider a more fundamental issue here.

Customers see store assistants as an obstacle.

Prof. Dr. Phil Klaus, Leading global CX Strategist and Advisor explains, *"The fact that 51% of retail customers would prefer to avoid human interaction speaks to the level of customer service being offered."*

"In retail, human beings are not considered an asset. My question to retailers is, why are the most important people in the company for delivering a good customer experience also the least educated, worst paid and most under-appreciated in the entire company?"

*"My advice is simple: **hire people trained in empathy and treat them well. This is what the most profitable companies are already doing, so what is stopping you?"***

"Hire people trained in empathy and treat them well. This is what the most profitable companies are already doing, so what is stopping you?"

Prof. Dr. Phil Klaus
Customer Experience Strategist

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If all your touchpoints are connected by a pool of customer data, but your store assistants aren't able or willing to make good use of that information, then they are going to be the weak link in the chain. This could explain why store assistants read as an obstacle to shoppers.

Again and again, we're seeing the leading retailers creating powerful experiences by giving store assistants the training and tools to better understand where a customer is in their journey. A great example of this is Nike's Paris-based House of Innovation, which beautifully blends the physical and digital. Within Nike's app, shoppers can scan barcodes to select items which will be sent to their fitting room for them to try on. However, those who want more human interaction can use an in-app text to set up a session with a Nike expert, who will be equipped with data on the shopper's style and preferences to deliver a value-add experience.

The Nike example highlights the potential of connecting store assistants to the right information. **Having a truly omnichannel capability that draws from one source of real-time data is critical to delivering this elevated customer service.** When in-store staff know what a customer might need at that specific moment, they can deliver a much smarter human interaction.

Takeaways:

- Shoppers want convenience. If they don't get it, they will walk away. A third of consumers (33%) would stop using a retailer for not offering the services they want to see in 2021.

- Perceptions of what makes for good customer service are changing. More than half of shoppers want to avoid any interaction with staff when visiting a store (51%).

- 2 in 5 people (41%) would like to see self-service tills introduced by more retailers.

- However, the role of the humble shop assistant should not be eliminated. Poor customer service is a powerful disincentive for 35% of customers, but when enhanced by training and technology, can provide an important differentiator.

- Lack of usability within the insights from tech means data is not manifesting in better customer experience. This needs to change - now.

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GETTING RETAILERS READY FOR THE NOW

RETAILERS NEED TO INTRODUCE NEW SERVICES TO SURVIVE

Customers expect retailers to introduce new services, but it can be difficult to know exactly what these should look like. This is why agility is so important. Topshop was a high street icon that failed because it didn't innovate in line with customer expectations, or the competitive landscape which shaped them.

As an example, **50% of consumers we surveyed would most like to see retailers introduce free delivery and returns.** This is something digitally native retailers such as ASOS and Amazon are widely regarded to offer as standard. However, the reality is that even ASOS and Amazon charge for an annual 'free' delivery option - but Topshop was unable or unwilling to implement a similar service.

Brands like ASOS have also been quick to adopt buy now, pay later options such as Klarna. This investment was a smart move; more than 7 million consumers have now used Klarna in the UK, and **15% of our respondents said not enough retailers are currently offering a buy now, pay later option.** The likes of Topshop, Warehouse and Oasis did not keep pace and this ultimately led to their collective demise.

Our respondents also said that not enough retailers offer Click and Collect services (15%) or notifications when products are restocked (18%). However, a more powerful incentive than these conveniences is a loyalty scheme, which 30% of customers don't feel enough retailers are offering. **Shoppers are keen to build more complex relationships with the brands they buy from. However, too many retailers have internalised a belief that the customer journey ends at the point of purchase.** This completely ignores the fact that the majority of revenue comes from loyal customers who continually return. Retailers must remember that it's far more expensive to win back a customer who has left than it is to retain a customer.

The simple truth is that customer expectations are in flux. In order to survive, retailers need an excellent understanding of their customer's demands and the agility to adapt quickly. Even high street stalwarts can go under for failing to acknowledge this. **No business is immune to the need to deliver what customers want in the now.**

Half of consumers list free delivery and returns as one of their top wishes for more retailers to introduce in 2021 (50%).

What are the top three things you feel not enough retailers are offering?

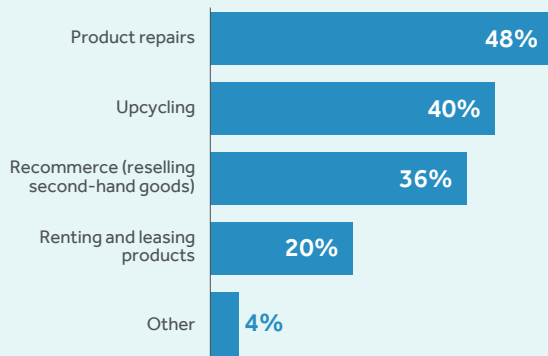| Category	Percentage
Free delivery and returns	50%
Loyalty cards	30%
Excellent customer service	23%
Products that have little to no impact on the environment	19%
Notifications when products are restocked	18%
Buy now pay later services	15%
Click and collect	15%
Improved hygiene	13%
Ability to purchase via an app	13%
Contactless payments	12%
Increased personalisation of products	7%
Trying products using AR	6%
Ability to purchase on social media	6%
Subscription services for the products I regularly buy	6%
Other	3%

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SUSTAINABILITY MATTERS

One of the biggest shifts we're observing is a move away from mass-consumption and towards sustainability. For example, **almost half of consumers want retailers to offer more product repairs (48%) while 2 in 5 want more upcycling initiatives (40%).** Additionally, 36% want to see second-hand goods and 20% wish to see more renting and leasing services offered. These last two trends have been especially prevalent for fashion, with sales of second-hand clothing set to grow 69% between 2019 and 2021. However, even outside of fashion, a focus on reusing, recycling and sustainability should be top of mind when adding services.

Besides being an ethical necessity for an increasing number of customers, **a circular approach to retail is an excellent opportunity to foster customer loyalty.** The circular model extends the association between retailer and customer beyond the payment, creating a much more complex and reciprocal relationship than one based purely on transaction.
A good example is Looop by H&M which is the world's first in-store recycling system based in Stockholm. For around £10, Looop shreds an old garment and knits a new one from the fibres. This creates an engaging customer experience as well as a shared commitment to sustainability for both the shopper and retailer.

Almost half want retailers to offer more product repairs (48%), and 2 in 5 want more upcycling initiatives (40%).

The demand for circular value propositions is there. Now retailers need to embrace this fact, and the technology that can support more diversified and sustainable customer experiences.

"Retailers think the consumer is king, but in the era of circular economy it's a symbiotic relationship," says Dr. Kerli Kant Hvass, a circular economy researcher and consultant.

"If retailers can bring solutions like take-back schemes or rental models to the market in an attractive and convenient way, they can make these options more accessible for existing customers, while attracting new customers.

"The call for sustainability is pushing retailers out of their comfort zone. Their role in our economy today is to sell a product – the more they sell the better it is. But this needs to evolve.

A sustainable approach might not show direct ROI from the beginning, but retailers need to critically evaluate the value proposition they offer today and how it fits into a future economy and circular context.

*Its important to pay close attention to the sustainability trend, understand your consumer and be there on time, because **consumers are changing. The world is changing. Retailers have a responsibility to facilitate sustainable consumption and transition of a circular economy."***

Which of the following sustainability initiatives do you want more retailers to offer you?

Initiative	Percentage
Product repairs	48%
Upcycling	40%
Recommerce (reselling second-hand goods)	36%
Renting and leasing products	20%
Other	4%

CUSTOMERS ARE MORE CONSCIENTIOUS

1 in 4 customers list unfair treatment of staff and suppliers as a main reason to avoid shopping with a retailer. This is a new battleground on which retailers need to win over customers.
Boohoo learned this the hard way when the mistreatment of workers in their Leicester factories made headlines. Within two weeks, the value of their shares had nearly halved.

> "In the last year, 30% of customers have boycotted a retailer due to lack of awareness for the environment."

Retailers may have got away with turning a blind eye in the past, but internet activism has mobilised customers to vote with their feet. Brands are now much more accountable for actively ensuring visibility and ethical practices across their entire supply chain. Anything less could prove to have disastrous results. What's more, consumers' ethical scrutiny extends beyond treatment of staff.

**In the last year, 30% of customers have boycotted a retailer due to a lack of environmental awareness.** This figure is expected to grow considerably with just less than half (49%) of respondents ready to boycott retailers who aren't championing sustainability in 2021.

It's worth noting that the perceived importance of sustainability differs according to age. A staggering 54% of 18 - 25-year-olds boycotted a brand last year due to environmental issues. This compares to only 5% of over 65s, but the older demographic is increasingly keen to show support for the environment with 37% planning to boycott unsustainable retailers in the next 12 months. This is a potentially significant increase in a short amount of time, and one that retailers cannot ignore.

Retailers risk losing just under half of their customer base if they over-price (43%) or if they don't show their environmental credentials (49%). The difficult question is, how do they do both? This presents a challenging conundrum for retailers. A critical part of the solution will come from understanding the top disincentives for their shopper demographic and optimising accordingly. In the longer-term, retailers need to create total visibility in their supply chains, so that they can carefully optimise operations to meet expectations around both value and ethical practices.

In the last year, 30% have boycotted a retailer due to lack of awareness for the environment. In the next 12 months, 49% believe they will do this.

Would you boycott a retailer based on its lack of awareness on environmental and sustainability issues?

| Environment and sustainability | 30% |
| | 49% |

■ Yes, I have done this in the last 12 months
■ Yes, I will do this in the next 12 months
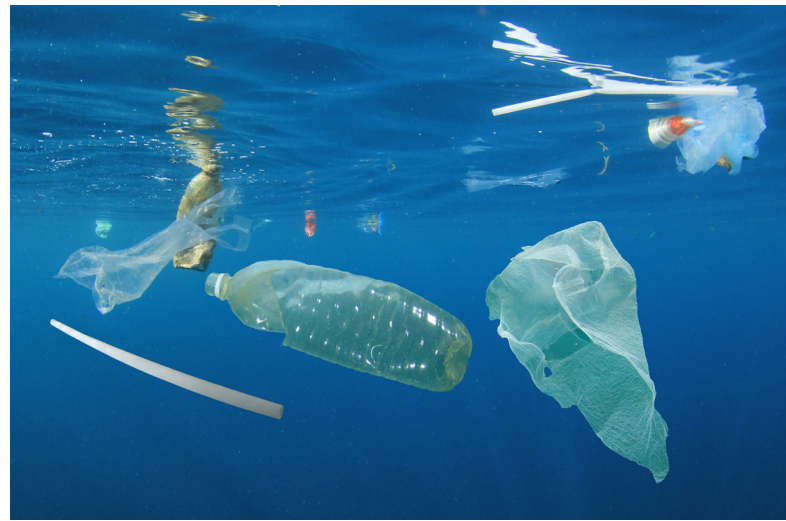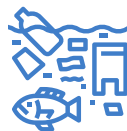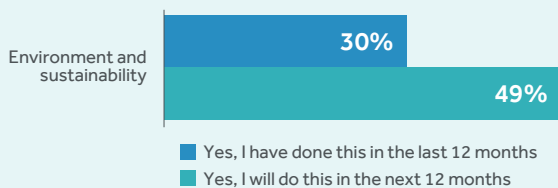
Takeaways:

Customers are making new demands and retailers must adapt or they will fail. In the now, customers are asking for:

Free delivery and returns: 50% of shoppers demand this service but the cost can cripple a retailer. Paid 'free' delivery models such as Amazon Prime and ASOS are worth considering.

Sustainability and ethics: These are no longer nice-to-haves; nearly half of customers are prepared to boycott brands that don't care about the environment or their workers. Customers want more circular initiatives. Retailers need to seriously consider how their model fits into a more sustainable future.

However, customer expectations are constantly in flux; the goalposts are continuously changing. In order to survive, retailers need an excellent understanding of their customer's demands and the agility to adapt quickly.

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TECHNOLOGY THAT SERVES NOW

GETTING CREATIVE WITH TECHNOLOGY ENABLED EXPERIENCES

While retail titans have been brought to their knees for lack of customer knowledge and agility, plenty of high street players have showcased remarkable resilience. In fact, for some, this sudden necessity to adapt has fast-tracked opportunities within their customer experience which they thought were years down the line. For example, New York-based cult cosmetics brand Il Makiage responded to lockdown by developing a PowerMatch Quiz to help shoppers find the perfect foundation online.
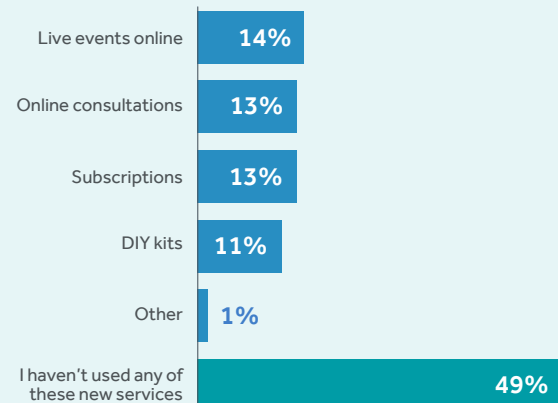
COVID-19 has prompted brands to get creative with technology and create compelling, personal experiences outside of their bricks and mortar stores. Lockdown has seen the introduction of interactive, digital retail experiences with a focus on live online events and online consultations. **The fact that retailers have managed to get more than half of consumers to try these new experiences during the pandemic is very promising.**

These experiences have been most popular with younger age groups, with 70% stating they had used at least one of them, compared to just 20% of over 65s. **The most popular at home experiences included live events online (14%), online consultations (13%) and subscription services (13%).** Online consultations were most popular amongst ages 35-44 with 21% saying that they have used them, compared to just 5% of over 65s.

As our research has shown, retail business models need to change in line with what customers are demanding in the now. Retailers will need to continuously reinvent how they engage with consumers as lockdowns ease and shopping patterns change yet again. A connected tech strategy is key to facilitating this change, as it will provide a seamless connection between existing services and new initiatives.

51% of respondents have tried new retail experiences during lockdown, with live online events (14%) being the most popular format.

Which has been your favourite new retail experience during lockdown?

Experience	Percentage
Live events online	14%
Online consultations	13%
Subscriptions	13%
DIY kits	11%
Other	1%
I haven't used any of these new services	49%

CITIES ARE GOING TO CHANGE COMPLETELY

One of the biggest changes facing retailers is a metamorphosis of the modern city. **56% of city dwellers we surveyed are considering moving,** with 32% dreaming of somewhere more rural, and 24% considering living abroad. The attractions that city life once held have been curtailed by the pandemic, and with opportunities for remote work growing, many have become frustrated with life in the modern city. Over the next year, we'll see the density of footfall from high earning city workers trickle out of UK cities. **Retailers will need to rethink strategies when it comes to location.**
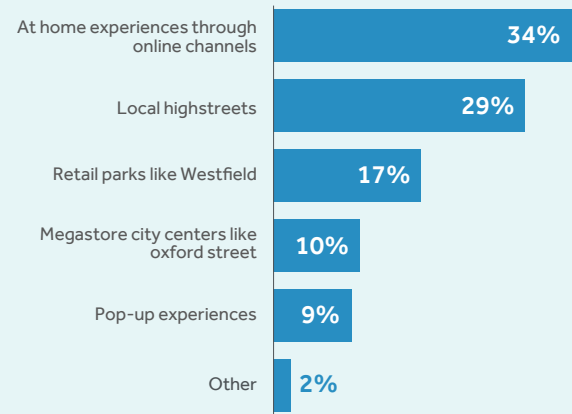
"With more than half the urban population considering moving away from their cities, along with more people than ever working from home, we could see a real resurgence of the local high street over the next 10 years. Large flagship stores will make way for smaller footprint, connected stores designed with the local population in mind," said Andy Howell, Global Marketing Director, K3.

Nike's Community Store initiative provides a compelling example of how this trend could play out. In addition to providing local retail experiences, these stores are designed to create a relationship with the community via volunteering, mentoring and grants for grassroots initiatives. The combination of this local approach with some of the digital-first services seen in Nike's House of Innovation stores shows us what the future of the high street should look like.

Finally, our research has found that the most popular shopping experiences for the coming decade will be online (34%) and on the local high street (29%). This will come at the expense of **large footfall stores found in retail parks such as Westfield and megastore city centres like Oxford Street.** These stores will continue to struggle, with only 17% and 10% respectively expecting to interact most with these over the next 10 years. Retailers that fail to act on this insight could end up overcommitted on the high-cost retail centres of the past and unable to invest in a local strategy.

A third expect to interact more with home experiences through online channels over the next 10 years (34%).

Which of these retail models do you expect to interact with most in the next 10 years?

Retail model	%
At home experiences through online channels	34%
Local highstreets	29%
Retail parks like Westfield	17%
Megastore city centers like oxford street	10%
Pop-up experiences	9%
Other	2%

Takeaways:

More than half of consumers have experimented with new experiences during the pandemic. The most popular at-home experiences included live online events (14%) and online consultations (13%). Retailers need to monitor whether these deliver long term value post lockdown.

56% of shoppers in cities are considering a mass exodus. This will lead to a resurgence of the local high street, especially in rural areas. Retailers need to invest in a personalised local strategy that seamlessly connects online and offline.

Over the next 10 years, a third of customers expect to interact most with brands online, while 29% of shoppers will stick to the local high street. Large footprint stores will struggle. Retailers need to act on this insight now, and **create a compelling offering on local high streets.**

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CONCLUSION

Shoppers need to be met where they are now, and the only way to achieve this is by connecting to your customers, and delivering what they want, now. Depending on the demographic, sustainability, price, or good corporate citizenship could be the most important factors for retaining shoppers. Fail to understand or adapt and you could face lose a third of your customers.

While each retailer needs to take a deep dive into what their particular demographic wants in the now, there are also some wider trends that we have identified across the board.

Accelerated by COVID-19, one of the biggest cultural shifts is shoppers wanting less interaction with staff. This is something that all retailers – both big and small – need to consider in the immediate future. In order to achieve this, retailers need to really understand their customers so they can offer a digitally enhanced, omnichannel approach that meets their needs and keeps them coming back.

Shoppers now, more than ever, expect retailers to align with their beliefs. This is especially true when it comes to sustainability. Unless they look at offering sustainable services and are considering a sustainable supply chain, they risk losing customers. Something no retailer can afford.

However, the environmental impact isn't the only factor that retailers have to consider. Overpriced goods and poor ethics will also trigger customer loss over the next 12 months. Ultimately, retailers have lots of balls to juggle, and dropping one could spell their demise.

Technology is the lifeblood, helping retailers adapt both now and in the future.

Whether it's exploring sustainability, delivering self-service options or showcasing ethical practices, the right technology is the key to being ready for the now.
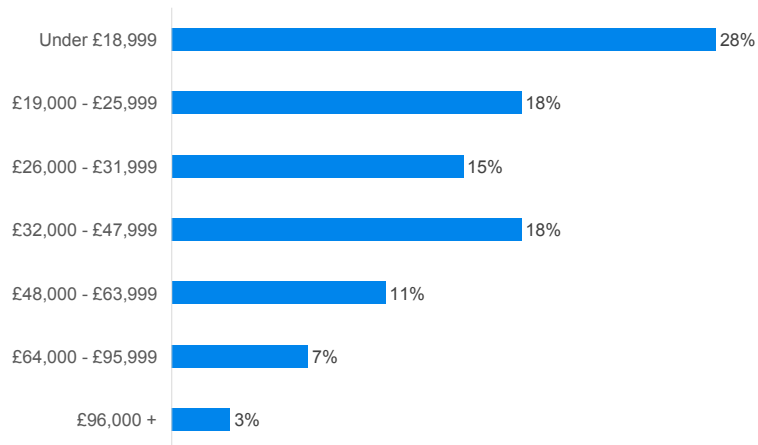
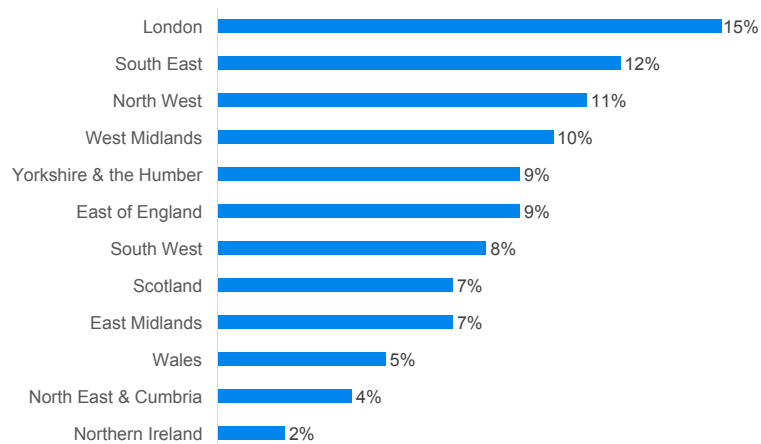Technology is the lifeblood, helping retailers adapt both now and in the future.

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APPENDIX

Household income

SAPIO
RESEARCH

Under £18,999	28%
£19,000 - £25,999	18%
£26,000 - £31,999	15%
£32,000 - £47,999	18%
£48,000 - £63,999	11%
£64,000 - £95,999	7%
£96,000 +	3%

S4. What is your household income? Select one   Base: 2004

Region

SAPIO
RESEARCH

London	15%
South East	12%
North West	11%
West Midlands	10%
Yorkshire & the Humber	9%
East of England	9%
South West	8%
Scotland	7%
East Midlands	7%
Wales	5%
North East & Cumbria	4%
Northern Ireland	2%

S3. What region are you in? Select one   Base: 2004

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APPENDIX

Gender

- Male 47%
- Female 52%

S2. Are you...? Select one — Base: 2004

Age

Age	%
18 - 24	16%
25 - 34	19%
35 - 44	21%
45 - 54	18%
55 - 64	14%
65+	12%
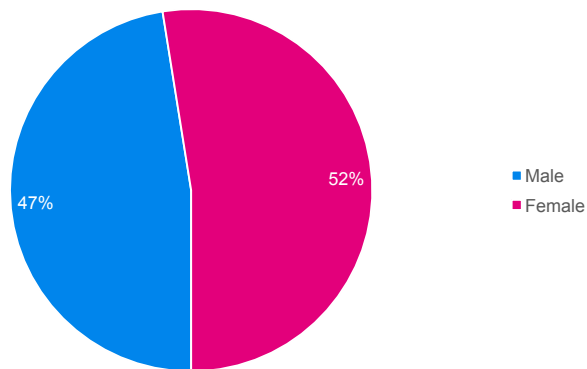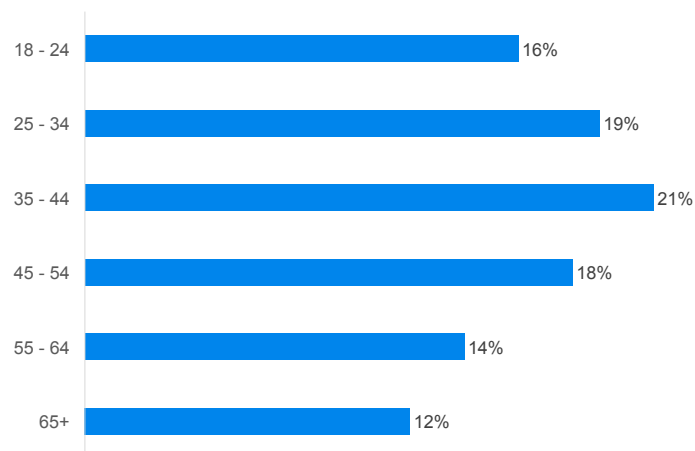
S1. How old are you? Select one — Base: 2004

K3 has been at the forefront of the retail technology industry
for the last 30 years. As a leading supplier of software
solutions, we have serviced countless clients across the globe.

We blend our own IP with third-party solutions and leverage
the flexibility of our future-facing K3|Imagine platform to
create an indispensable end-to-end IT infrastructure for
businesses of all sizes.

K3|Imagine is a flexible, adaptable and extensible foundation
from which our customers can holistically build
and integrate boundless areas of connected interaction,
intelligence and services.

In a world full of uncertainty, K3 provides an absolute resolution
to today's biggest challenges and empowers businesses to be
ready for the now.

We are truly fundamental to a healthy business.

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