



L2

DIGITAL IQ *INDEX:*

Specialty Retail

September 6, 2012

SCOTT GALLOWAY
NYU Stern

In partnership with:



SapientNitro™



STELLAService

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What's Old Is New Again

The brave new world of social media has simmered as it appears that (thus far) hype has trumped impact. Meanwhile, 15+ years on, e-commerce has become the disruptive force first envisioned in the late 1990s. In the first quarter of 2012, online retail spending in the United States reached \$44.3 billion, up 17 percent YoY.¹ E-commerce is expected to grow at a 13.3 percent

CAGR, reaching \$361 billion in the U.S. by 2016.² With brick and mortar retail flat or declining, the percentage of sales (and growth) traditional retailers register online could become the arbiter sorting winners from losers. Many traditional retailers now register more than a quarter of their sales online.

Size Matters

Scale is beginning to translate online. For the first time, there is a significant relationship between the size of a retailer's business and Digital IQ. The relationship strengthens when looking at the size of retailers' online businesses.

Department Stores: Rumors of Our Death Are Greatly Exaggerated

Department stores have found sanctuary in the digital domain. Building on the successes from 2011 for the first time, the average Digital IQ for the category outpaced children of the medium, the e-tailers. The top two spots in the 2012 *Digital IQ Index®: Specialty Retail* were (decisively) captured by Macy's and Nordstrom, respectively.

Amazon.com: The Great White Shark of Retail

A peerless e-commerce experience coupled with a 37 percent share of U.S. m-commerce³ make Amazon.com the force reshaping retail. The most recent victims are other e-tailers who can't compete. Amazon now has brick and mortar peers squarely in its cross hairs. As Amazon reinvests cheap capital in a supply chain marching to same day delivery, it eats away at one of the few remaining advantages of terrestrial retail—immediacy. Amazon is the retail ocean's lone Great White Shark, broadening its prey from slow fat seals to ... everything that swims.

Specialty Retail Video [Click to Play](#)



1. "comScore Reports \$44.3 Billion in Q1 2012 U.S. Retail E-Commerce Spending, Up 17 Percent vs. Year Ago," comScore Press Release, May 9, 2012.
2. "Apparel Drives US Retail Ecommerce Sales Growth," eMarketer Press Release, April 5, 2012.
3. "Amazon To Book \$2 Billion In M-Commerce This Year," Steve Smith, Media Post, September 29, 2011.

Mobile: "I Can't Believe How Much You've Grown!"

What was supposed to take ten years took three. Everyone, including Facebook, has been caught flat-footed by the adoption rate of smartphones, which has reached 165 million users in the U.S. alone.⁴ M-commerce is now the fastest growing retail channel in history, and mobile devices are likely influencing more on- and offline purchases than traditional broadcast, let alone an in-store salesperson. E-commerce is now m-commerce. Social media is now consumed via mobile app. Digital marketing is now centered on mobile search and mobile-optimized email.

Digital IQ = Shareholder Value

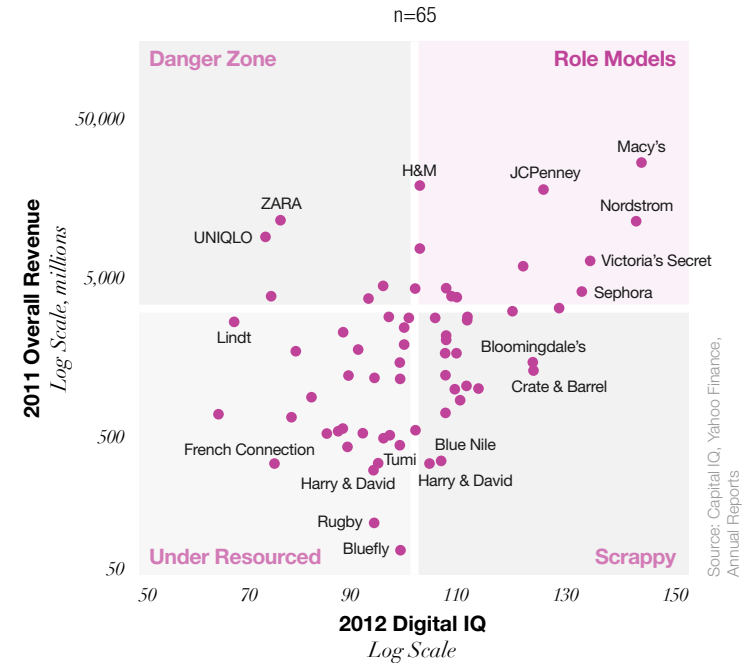
This study attempts to quantify the digital competence of 76 global retail brands. Our aim is to provide a robust tool to diagnose digital strengths and weaknesses and help brands achieve greater return on incremental investment. We have modified our methodology, increasing the weighting of a brand's site from 30 percent to 40 percent and decreasing the weighting of social media from 20 percent to 10 percent. In addition, with the help of partner STELLAService, we measured each retailers order and return fundamentals, purchasing and tracking from three distinct locations. Similar to the medium we are assessing, our methodology is dynamic and we hope you will reach out to us with comments that improve our methodology, investigation, and findings. You can reach me at scott@stern.nyu.edu.

SCOTT GALLOWAY

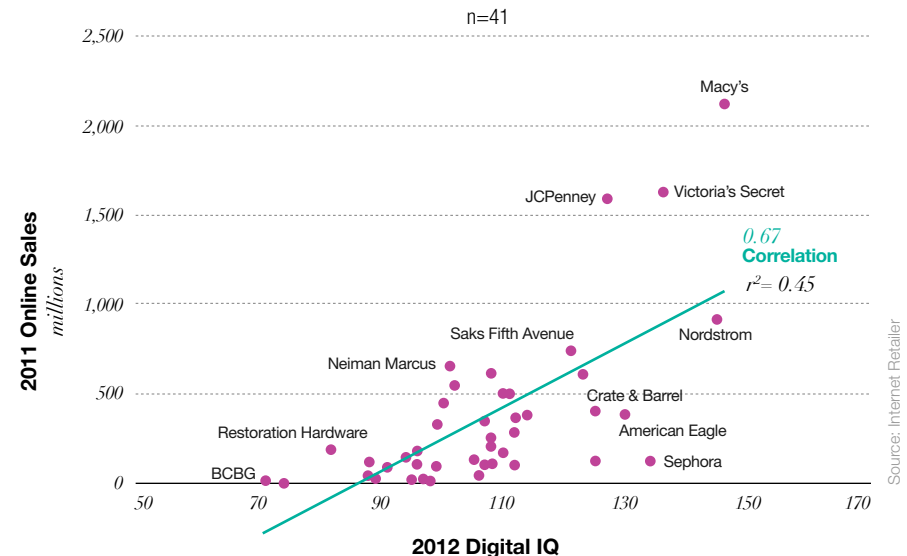
Clinical Professor of Marketing, NYU Stern
Founder, L2

4. "Smartphone Adoption Rate Fastest in Tech History," Stephanie Miot, PC Magazine, August 27, 2012.

2012 Digital IQ vs. 2011 Overall Revenue



2012 Digital IQ vs. 2011 Online Sales



ABOUT THE RANKING

The Methodology

20% *Mobile*

Compatibility, Optimization, & Marketing on Smartphones, Tablets, & Other Mobile Devices

Mobile Site

- Compatibility
- Functionality
- Transaction Capability

iOS Applications (iPhone & iPad)

- Availability
- Popularity
- Functionality
- iPad Differentiation

Android

- Availability
- Popularity
- Functionality

Innovation

- SMS
- Geolocal
- Recent Brand Initiatives

10% *Social Media*

Brand Presence, Community Size, Content, & Engagement

Facebook "Likes", Growth, Tabs & Apps, Responsiveness, Interaction Rate

Twitter Followers, Growth, Frequency, Online Voice

YouTube Views, Number of Uploads, Subscriber Growth, Viral Videos, YouTube Search

Emerging Social Media

Instagram, Google+, Pinterest, Tumblr

Twitter Customer Service Responsiveness

PROVIDED BY STELLAService

40% *Site*

Effectiveness of Brand Site & E-commerce Operations

Functionality & Content – 90%

- Technology
- Navigation & Product/Site Search
- Social Media Integration
- Customer Service & Store Locator
- Product Page
- Checkout
- Account/Registry
- Order/Return Timing & Logistics

PROVIDED BY STELLAService

Brand Translation – 10%

- Aesthetics
- Messaging & Visuals

PROVIDED BY SapientNitro

30% *Digital Marketing*

Search, Display, & Email Marketing Efforts

Search

- Traffic
- SEM
- SEO
- Web Authority

Advertising & Innovation

- Display
- Retargeting
- Brand Initiatives

Blog & Other User-Generated Content

- Mentions
- Sentiment

Email

- Frequency
- Content
- Social Media Integration
- Promotions

Digital IQ Classes

Genius 140+

Digital competence is a point of differentiation for these retailers. Brands have user-friendly sites, m-commerce, robust social campaigns, and strong SEO/SEM. Digital is built to last.

Gifted 110–139

Brands are experimenting and innovating across their site, mobile, and both traditional and emerging social media platforms. Digital presence is strong, complementing brand image and larger marketing efforts. Primed to make a move.

Average 90–109

Digital presence is functional yet predictable. Uninspired efforts are often siloed across platforms and not always consistent. Middle of the pack.

Challenged 70–89

Inconsistent adoption of digital platforms and a lack of vision. Platforms lacks inspiration and utility. On the outskirts.

Feeble <70

Investment does not match opportunity. Losing ground.

DIGITAL IQ RANKING

Rank	Brand	Digital IQ
GENIUS	1 MACY'S	146
	2 NORDSTROM	145
GIFTED	3 VICTORIA'S SECRET	136
	4 SEPHORA	134
	5 AMERICAN EAGLE OUTFITTERS	130
	6 JCPENNEY	127
	7 BLOOMINGDALE'S	125
	7 CRATE & BARREL	125
	9 GAP	123
	10 SAKS FIFTH AVENUE	121
	11 WILLIAMS-SONOMA	114
	12 BANANA REPUBLIC	112
	12 RALPH LAUREN	112
	12 LULULEMON ATHLETICA	112
	15 ANTHROPOLOGIE	111
	16 URBAN OUTFITTERS	110
	16 STEVE MADDEN	110

Rank	Brand	Digital IQ
	16 TIFFANY & CO.	110
	19 NINE WEST	109
	20 EXPRESS	108
	20 COACH	108
	20 NET-A-PORTER	108
	20 LACOSTE	108
	20 WHITE HOUSE BLACK MARKET	108
	20 POTTERY BARN	108
AVERAGE	26 BARNEYS NEW YORK	107
	26 BLUE NILE	107
	28 GUESS	106
	29 A X ARMANI EXCHANGE	105
	29 WEST ELM	105
	31 H&M	103
	31 SWATCH	103
	33 ABERCROMBIE & FITCH	102
	33 JUICY COUTURE	102

Rank	Brand	Digital IQ
	35 NEIMAN MARCUS	101
	35 SHOPBOP	101
	37 AEROPOSTALE	100
	37 J.CREW	100
	39 L'OCCITANE EN PROVENCE	99
	39 CHICO'S	99
	39 BLUEFLY	99
AVERAGE	39 LUSH	99
	43 ALDO	98
	44 BEBE	97
	44 BATH & BODY WORKS	97
	46 CARTIER	96
	46 BROOKS BROTHERS	96
	46 7 FOR ALL MANKIND	96
	49 TUMI	95
	50 TALBOTS	94
	50 RUGBY	94

GENIUS
Macy's
Nordstrom

GIFTED
Victoria's Secret
Sephora
American Eagle Outfitters
JCPenney
Bloomingdale's
Crate & Barrel
Gap
Saks Fifth Avenue
Williams-Sonoma
Banana Republic
Ralph Lauren
Lululemon athletica
Anthropologie
Urban Outfitters
Steve Madden
Tiffany & Co.

AVERAGE
Nine West
Express
Coach
NET-A-PORTER
Lacoste
White House | Black Market
Pottery Barn
Barneys New York
Blue Nile
GUESS
A|X Armani Exchange
west elm
H&M
Swatch
Abercrombie & Fitch
Juicy Couture
Neiman Marcus
Shopbop
Aeropostale
J.Crew
L'OCCITANE en Provence
Chico's
Bluefly
LUSH
ALDO
bebe
Bath & Body Works
Cartier
Brooks Brothers
7 for All Mankind
Tumi
Talbots
Rugby
Harry & David
Swarovski
Bergdorf Goodman
Zales

CHALLENGED
Gymboree
Lucky Brand
American Apparel
Ann Taylor
Club Monaco
Dean & DeLuca
Cole Haan
Diesel
Toumeau
Restoration Hardware
Lord & Taylor
The Body Shop
Godiva Chocolatier
ZARA
French Connection
Stuart Weitzman
UNIQLO
Intermix
BCBG

FEEBLE
Lindt
Ethan Allen

DIGITAL IQ RANKING

	Rank	Brand	Digital IQ
AVERAGE	50	HARRY & DAVID	94
	53	SWAROVSKI	93
	54	BERGDORF GOODMAN	92
	55	ZALES	91
CHALLENGED	56	GYMBOREE	89
	56	LUCKY BRAND	89
	58	AMERICAN APPAREL	88
	58	ANN TAYLOR	88
	60	CLUB MONACO	87
	61	DEAN & DELUCA	85
	61	COLE HAAN	85
	63	DIESEL	84
	63	TOURNEAU	84
	65	RESTORATION HARDWARE	82
	66	LORD & TAYLOR	79
	66	THE BODY SHOP	79
	68	GODIVA CHOCOLATIER	78

	Rank	Brand	Digital IQ
CHALLENGED	69	ZARA	76
	70	FRENCH CONNECTION	75
	71	STUART WEITZMAN	74
	72	UNIQLO	73
FEEBLE	73	INTERMIX	71
	73	BCBG	71
	75	LINDT	67
	76	ETHAN ALLEN	64

GENIUS

Macy's
Nordstrom

GIFTED

Victoria's Secret
Sephora
American Eagle Outfitters
JCPenney
Bloomingdale's
Crate & Barrel
Gap
Saks Fifth Avenue
Williams-Sonoma
Banana Republic
Ralph Lauren
lululemon athletica
Anthropologie
Urban Outfitters
Steve Madden
Tiffany & Co.

AVERAGE

Nine West
Express
Coach
NET-A-PORTER
Lacoste
White House | Black Market
Pottery Barn
Barneys New York
Blue Nile
GUESS
AIX Armani Exchange
west elm
H&M
Swatch
Abercrombie & Fitch
Juicy Couture
Neiman Marcus
Shopbop
Aeropostale
J.Crew
L'Occitane en Provence
Chico's
Bluefly
LUSH
ALDO
bebe
Bath & Body Works
Cartier
Brooks Brothers
7 for All Mankind
Tumi
Talbots
Rugby
Harry & David
Swarovski
Bergdorf Goodman
Zales

CHALLENGED

Gymboree
Lucky Brand
American Apparel
Ann Taylor
Club Monaco
Dean & DeLuca
Cole Haan
Diesel
Touneau
Restoration Hardware
Lord & Taylor
The Body Shop
Godiva Chocolatier
ZARA
French Connection
Stuart Weitzman
UNIQLO
Intermix
BCBG

FEEBLE

Lindt
Ethan Allen

KEY FINDINGS

The Return of E-commerce

Brand sites continue to be the primary revenue-generation engine online, however significant low-hanging fruit remains. Only 50 percent of brands incorporate conversion-enhancing user reviews. Similarly, the Facebook "Like" API, a valuable source of incremental traffic, is employed by only 65 percent of retailers. Most notably, adoption of live chat fell to 26 percent, bucking the nationwide trend⁵ and suggesting that prestige retail brands are not seeing ROI on the technology. However, brands are investing more on their sites than in mobile or social platforms.⁶

Site investments appear to pay off—Genius brands keep users on their sites two and a half minutes longer than Feeble brands do.



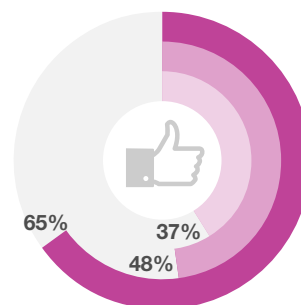
"Straight e-commerce sites serve a purpose, but to compete in a digital space a brand's web presence needs to be more than pictures and a shopping cart. To compete in today's retail world, the brand needs to create that personalized, one-of-kind, unique online experience, presenting consumers with options they didn't know they had."

— **BILL KANARICK**
WORLDWIDE CMO, SapientNitro

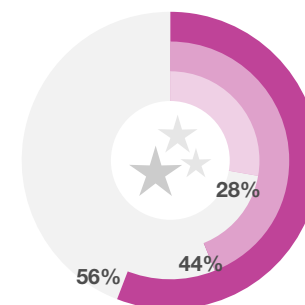
5. "Live Chat Effectiveness: A Survey of Internet Shoppers 2012," Bold Chat Research Report.
6. "Website investment still key for online retailers despite the rise of social and mobile," Maria Wasing, Econsultancy, September 3, 2012.

Site Feature Adoption % of Sites with the Following Tools July 2010–2012

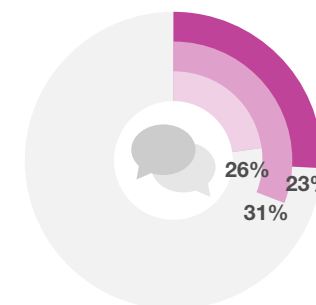
2010 n=84 2011 n=64 2012 n=76



Product Facebook "Like"

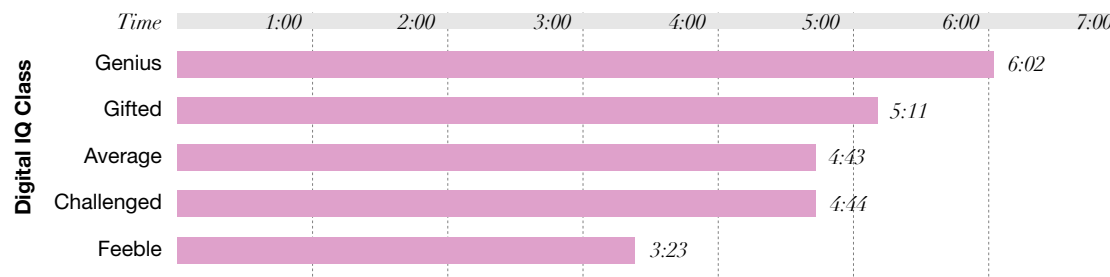


User Reviews

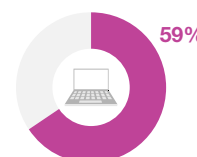


Live Chat

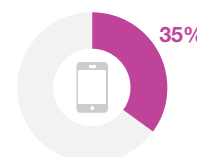
Site Visit Duration 3-Month Average Time on Site per User by Digital IQ Class Minutes, July 2012, n=76 brands



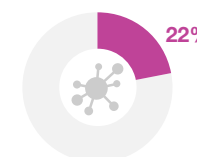
Where Retailers Are Investing⁶ % of Retail Executives Prioritizing Investments in the Following Media n=100



Site



Mobile



Social Networks

KEY FINDINGS

Red Light, Green Light

While Facebook's stock price may be down, the platform is not necessarily losing importance. Once again Facebook is a key traffic driver of users to retailer sites, representing 10 percent of upstream traffic. Conversely, Twitter does not represent any reportable upstream traffic, suggesting the medium is not a major e-commerce driver. Pinterest has emerged as a notable source of both upstream and downstream traffic.

Analysis of traffic to and from Amazon.com and other third party e-commerce sites reveals higher rates of downstream traffic than upstream, reinforcing the threat of the e-tailer. Facebook and Amazon together is an even bigger challenge to retailers. Last year, 14.5 percent of Amazon.com's 22.3 million hits⁷ on Black Friday came from social sites, up from 9.0 percent in 2010⁸—a powerful force. Overall traffic to retailers fell 7.1 percent year over year while Amazon.com's already massive traffic rose 13 percent, suggesting it feasts on the traffic cookie while everyone else fights over increasingly small crumbs.

Referral and Destination Sites for Specialty Retail Sites Upstream and Downstream Traffic to and from the Following Sources

July 2012



7. ["Retail traffic on Black Friday up 2%,"](#) Experian Hitwise Blog, November 26, 2011.

8. ["Social media helps big retailers drive traffic during the holidays,"](#) Internet Retailer, January 30, 2012.

KEY FINDINGS

Back to Basics

Email enjoys the highest conversion to traffic (4.25 percent in Q2 vs. 2.49 percent from search and 0.59 percent from social media)⁹, reinforcing its role as a crucial element of the marketing mix.

Although email open rates have fallen on PCs, the number of emails from retailers opened using a mobile device doubled between the fourth quarter of 2010 and the second half of 2011. While almost 70 percent of mobile users delete emails that do not render well,¹⁰ but only 42 percent of brands sent emails optimized for mobile. Email frequency actually fell year over year in our research, suggesting that retailers are getting better at segmenting their customers.

Just 16 percent of brands have a pop-up soliciting email signup on their sites, and only 36 percent are sending abandoned-cart emails (a powerful conversion enhancing tactic). Some brands, including Juicy Couture, have taken the abandoned cart email a step further, and include product suggestions. French Connection offers free delivery in its abandoned-cart communications to entice purchase.

9. "Social still can't beat search in online shopping," Donna Tam, CNET, August 10, 2012.

10. "Email Marketing Benchmarks: Key Data, Trends and Metrics," Lauren Fisher, eMarketer, August 2012.



Weekly Email Frequency by Category

Average Number of Emails per Week

July 2012

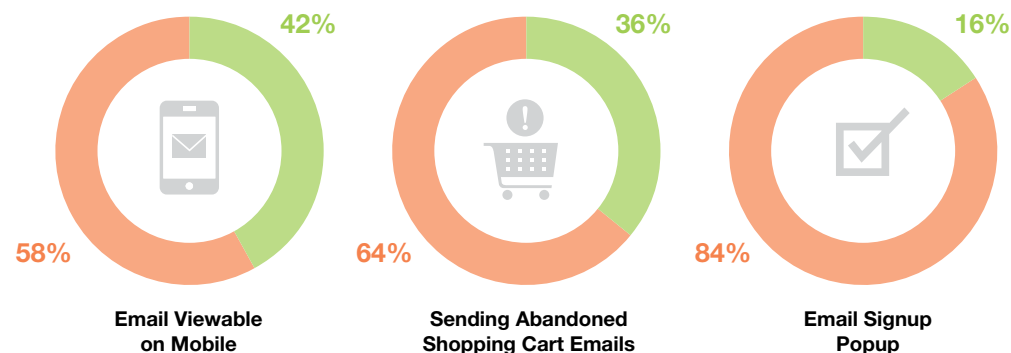


Advanced Email Functionality

% of Brands Implementing

July 2012, n=76


With Without



KEY FINDINGS



Twitter Service

 STELLAService sent one tweet to each retailer every day during the month of July, totaling 2,294 tweets. Each tweet asked a customer service question that required a response from the retailer.

Best Practices:



1 Respond Quickly.

Shoppers who ask a question over Twitter expect a response 100 percent of the time. Prioritize the response to these shoppers over others who may be making a statement about your brand.



2 Provide Recommendations.

Go the extra mile by recommending items to your shoppers and provide relevant links.



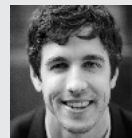
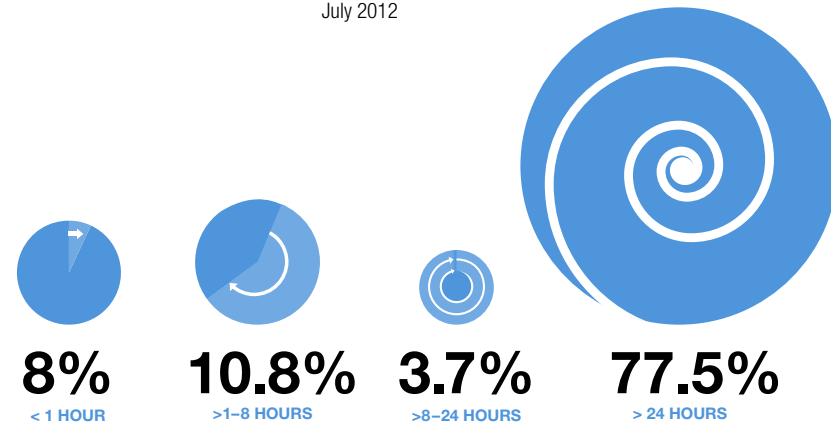
3 Recommend Connecting Over the Phone.

Shoppers like when their issues are elevated. Suggesting a phone conversation makes a customer feel more important

Brand Responsiveness on Twitter

% of Tweets Replied to Within Specified Time Periods

July 2012



"In comparison, during July the country's largest 25 retailers responded to 47.3 percent of tweets within 24 hours and 28.1 percent within one hour. Specialty retailers that have a presence on Twitter should ensure adequate engagement with shoppers. It's interesting to note that Amazon has made a conscious decision to not use Twitter as a service medium."

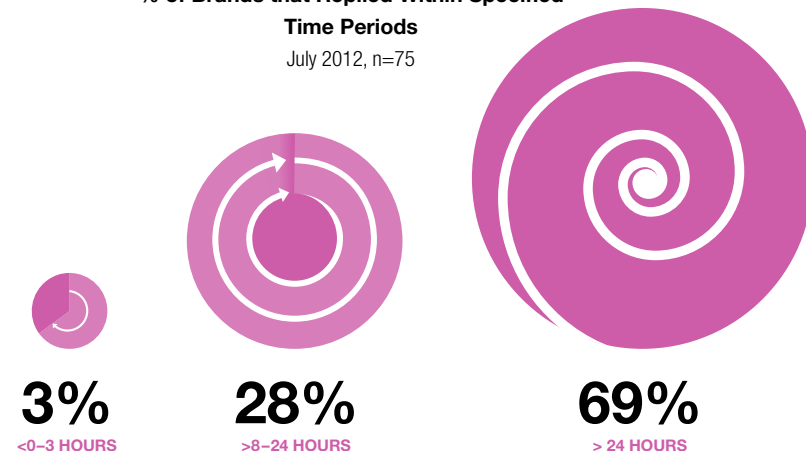
— JOHN ERNSBERGER | CO-FOUNDER & VP OF BUSINESS DEVELOPEMENT | STELLAService

Brand Responsiveness on Twitter

% of Brands that Replied Within Specified

Time Periods

July 2012, n=75



KEY FINDINGS

The New Girl

Pinterest reached 10 million unique visitors faster than any platform in history¹¹ and 86 percent of brands now have a presence on the visual site. Although Pinterest has yet to monetize this traffic, 32 percent of online shoppers have made a purchase based on what they've seen on Pinterest and other image-sharing sites.¹² In addition, the incorporation of the platform appears to increase email open and click rates.¹³ Purchases by Pinterest users average \$80, twice what Facebook users spend.¹⁴

Although presence on Pinterest is strong, utilization and strategy still lag. Only 23 percent maintain a board featuring user-generated content, and only 14 percent display prices on pins. This may soon change with New York City-based competitor The Fancy on the horizon. Having already surpassed a million members,¹⁵ this startup unites the visual elements of Pinterest with an upfront flash-sale e-commerce model.

11. "Pinterest Hits 10 Million U.S. Monthly Uniques Faster Than Any Standalone Site Ever," Josh Constone, TechCrunch, February 7, 2012.

12. "Pinterest leads to sales," Zac Stambor, internet Retailer, April 25, 2012.

13. "Pinterest Functionality Significantly Increases Email Open and Click Rates," Cynthia Boris, Marketing Pilgrim, June 26, 2012.

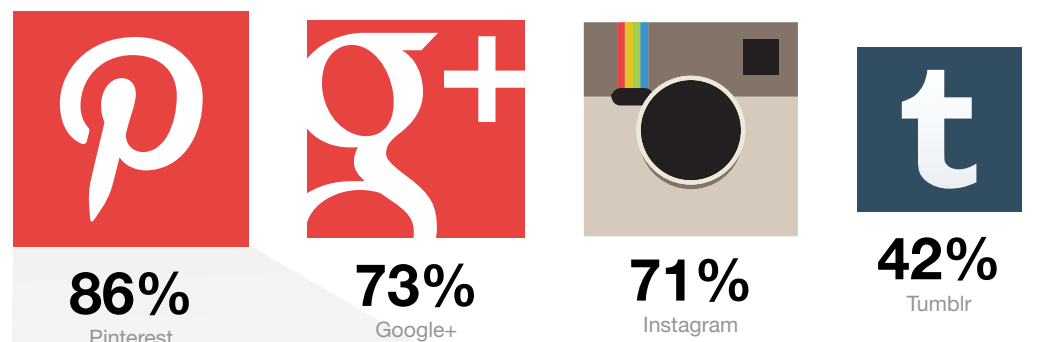
14. "How Pinterest Drives Ecommerce Sales," Mark Hayes, shopify, May 16, 2012.

15. "Can The Fancy Fulfill the Dreams of Pinners?," Scott Gillum, Forbes, August 7, 2012.

Social Media Penetration—Emerging Platforms

% of Brands on the Following Platforms

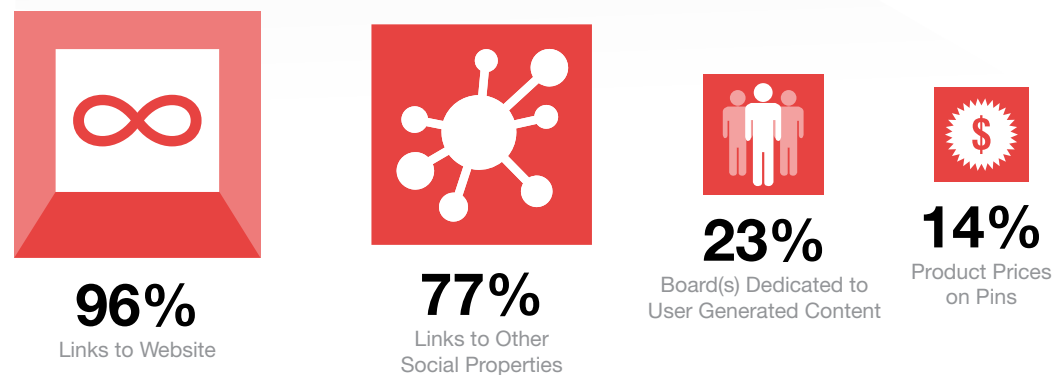
July 2012, n=76



Pinterest

% of Pinterest Pages with the Following Features

July 2012, n=69



KEY FINDINGS

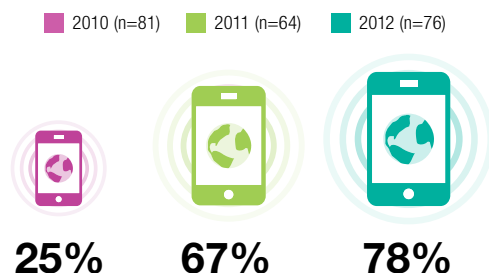
Movin' On Up

Smartphone penetration is almost 40 percent,¹⁶ and tablet adoption skyrocketed from zero to 25 percent in only two years.¹⁷ 69 percent of mobile users have used their device to get product information, and 82 percent of smartphone owners use devices to help with shopping in-store.¹⁸ All signs point to a future built around mobile. Seventy eight percent of brands in the 2012 index have a mobile-optimized site, up from a quarter two years ago.

Brands are building apps for iOS and Android, however iPad app adoption dropped from 39 percent in 2011 to 29 percent this year. Many retailers demonstrate higher conversion from their site on the tablet and likely don't want to obfuscate sales by having an app in the equation. Nine brands removed their 2011 iPad applications: Abercrombie & Fitch, Banana Republic, Bath & Body Works, bebe, Bergdorf Goodman, Bluefly, Diesel, Tiffany & Co., & Williams-Sonoma.

Mobile Site Adoption

2010–2012



16. "Smartphone penetration in the U.S. from 2010 to 2016," Statista, 2012.

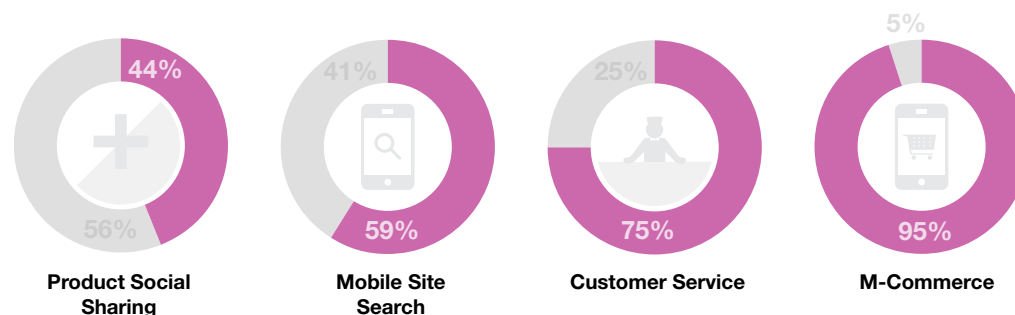
17. "Tablet Shopping Growing, but Retailers Must Keep Up," eMarketer, June 15, 2012.

18. "The Retailers Definitive Guide to m-Commerce Success," Cheryl Sansonetti, 5th Finger, May 2012.

Mobile Site Features

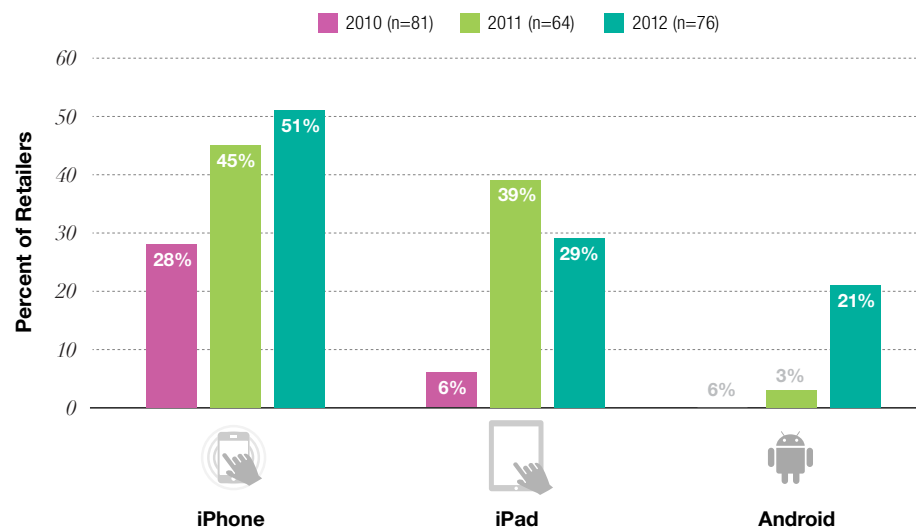
% of Mobile Sites with the Following Features

July 2012, n=59



Mobile Application Platform Adoption Rates

2010–2012



INSIGHTS



Insights 2013 Research Findings

L2 partner, SapientNitro, conducted an adjacent study ("In-Store Digital Retail: The Quest for Omnichannel") on the state of in-store digital retail, and if/how brands are building links between digital and physical stores. Visiting one location at each of the 71 retailers, SapientNitro gathered 500 data points across categories such as cross-channel inventory fulfillment, digital in-store marketing touch points, mobile in-store experience, and cross-channel sharing integration. They found in-store digital experiences (when they exist) often do not support in-store goals and activities.



"Over the past decade, retailers of all sizes have been driven by disruptive technologies and the changing consumer to make major investments in digital channels: eCommerce, smartphones and digital in-store. The

connected consumer's push for an omnichannel experience is inspiring retailers to introduce new ways to extend aisles, create adaptive environments, and deliver augmented packaging experiences."

— **HILDING ANDERSON**
DIRECTOR OF RESEARCH, SapientNitro

Selected Highlights from SapientNitro Insights Report:

Digital In-store Displays Are Powerful Tools—But Often Poorly Executed.

40 of the 71 retailers evaluated had no visible digital displays. Most focused solely on branded content, lacking interactivity.



The Right Tools Generate Positive ROI.

While the capital costs of implementing in-store digital are significant, those who have report a significant increase in ROI—on the order of 10 to 40 percent additional in-store sales—relative to other stores.

Retailers Should Focus On Supporting User Tasks

Well-designed, task-based tools emerged as being few and far between. 43 percent of brands had some sort of functionality supporting in-store tasks. However, often these efforts were anemic—static iPad kiosks and broken mobile apps.



Download the full SapientNitro *Insights 2013* report: sapient.com/insights

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50 ABOUT L2

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L2 is a membership-based think tank serving luxury and prestige brands, and agency, product, and platform partners. Our proprietary research provides benchmarking, analysis, and case studies on digital innovation.

To obtain the full report and learn more about L2 Membership benefits, contact membership@L2ThinkTank.com.

L2 is a think tank for digital innovation.

We are a membership organization that brings together thought leadership from academia and industry to drive digital marketing innovation.



RESEARCH

Digital IQ Index®: The definitive benchmark for online competence, Digital IQ Index® reports score brands against peers on more than 350 quantitative and qualitative data points, diagnosing their digital strengths and weaknesses.

L2 Collective®: Series of benchmarking reports designed to help member brands better understand resources, human capital, budgets, and priorities supporting digital strategies.



EVENTS

Forums: Big-picture thinking and game-changing innovations meet education and entertainment. The largest gatherings of prestige executives in North America.

300+ attendees

Clinics: Executive education in a classroom setting with a balance of theory, tactics, and case studies.

120–180 attendees

Working Lunches: Members-only lunches led by digital thought leaders and academics.

Topic immersion in a relaxed environment that encourages open discussion.

40–80 attendees



CONSULTING

Advisory Services: L2 works with brands to garner greater return on investment in digital initiatives.

Advisory work includes Digital Roadmaps, Social Media Strategy, and Organizational Strategy engagements.



MEMBERSHIP

For membership info and inquiries: membership@L2ThinkTank.com

Upcoming Events

L2 CLINIC: COMMERCE

September 13, 2012 • Paris

September 27, 2012 • New York City

L2 LUNCH: SPORTSWEAR

September 25, 2012 • New York City

L2 LUNCH: BEAUTY

October 4, 2012 • New York City

L2 LUNCH: SPECIALTY RETAIL & SPORTSWEAR

October 18, 2012 • San Francisco

L2 FORUM: INNOVATION 2012

November 6 & 7, 2012 • New York City

Upcoming Research

DIGITAL IQ INDEX® REPORTS:

<i>Sportswear</i>	<i>Beauty</i>
<i>Fashion</i>	<i>Automotive</i>
<i>Watches & Jewelry</i>	

L2 100® REPORTS:

China IQ
Asia Pacific IQ

L2 COLLECTIVE® REPORTS:

Media Mix
Social Media
Omni-Channel Commerce



L2 A THINK TANK
for DIGITAL INNOVATION

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