



2015

# The Movers & Shakers

## Multi-channel top 100 report

Glynn Davis | [RetailInsider.com](http://RetailInsider.com)



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“This year we saw so much dynamism in the industry, we had to expand the top 25 to the top 35...”

## What a year

Wow what a year it has been in retail both in the UK and internationally and I am so excited to be a part of the 6th edition of the Movers & Shakers 2015 report.

This year we saw so much dynamism in the industry, we had to expand the top 25 to the top 35! It was the only way we could reflect the incredible individuals who are really making an impact in the world of Multi-channel retail. It is also great to see some familiar faces back in this edition.

A massive thank you must again go to Glynn and the Advisory Panel of Experts who during the summer were locked away to debate who would be in the final report.

The final thanks must go to all of the named individuals within the report and the businesses they represent, the premise of the report when we started out 6 years ago was to seek out the most influential people who were shaping retail as well as highlighting those 'rising stars'.

Again this edition really does demonstrate the diversity of roles within the retail space and the significant contribution that makes the UK retail sector one of the most dynamic and exciting.

I look forward to some debate and discussion about who's in and who's out and welcome your feedback.

Tony Bryant

Business Development Director K3 Retail

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“What a year it has been. Multi-channel retail continues to evolve, innovate and disrupt.”

## Welcome

A very warm welcome to the sixth annual "Retail Insider Top 100 Movers & Shakers in Multi-channel Retail" report that continues with its primary objective of celebrating the achievements of the stars plying their trade in arguably the most interesting part of the retail industry.

What a year it has been. Stores have had a dramatic renaissance – helped by the rise and rise of click & collect, the sharing economy with the likes of Uber and Airbnb as primary drivers has taken off, and mobile is now the foremost digital channel of engagement for most people.

This tremendous level of dynamism in the industry is reflected in this latest Movers & Shakers report for 2015 with the Top 35 names including a tremendously varied mix of individuals from across the entire industry.

We are pleased to say that it includes some lesser known names from smaller retailers as well as investors and non-executive directors because they are all vitally important to ensuring Multi-channel retail continues to evolve, innovate and disrupt, and therefore stays relevant for today's (and tomorrow's) ever more demanding customers.

The methodology continues to evolve also and this year the number of ranked names has been expanded from 25 to a Top 35, which gives greater visibility of the individuals who are making a difference in the world of Multi-channel retail.

The diversity of the constituents of the Top 100 this year suggests the industry is in rude health in terms of how it is getting to grips with digital and Multi-channel. Yes, there is clearly lots of work still to be done but at least it looks like there is the right calibre of people around to make it happen.

I'd like to offer my wholehearted thanks to the hand-picked Advisory Panel involved in this year's report for the time and diligence they committed to this increasingly rigorous process.

And finally, of course, it's a big thank-you to K3 Retail for their much appreciated ongoing sponsorship of this definitive Multi-channel Movers & Shakers report.

Glynn Davis  
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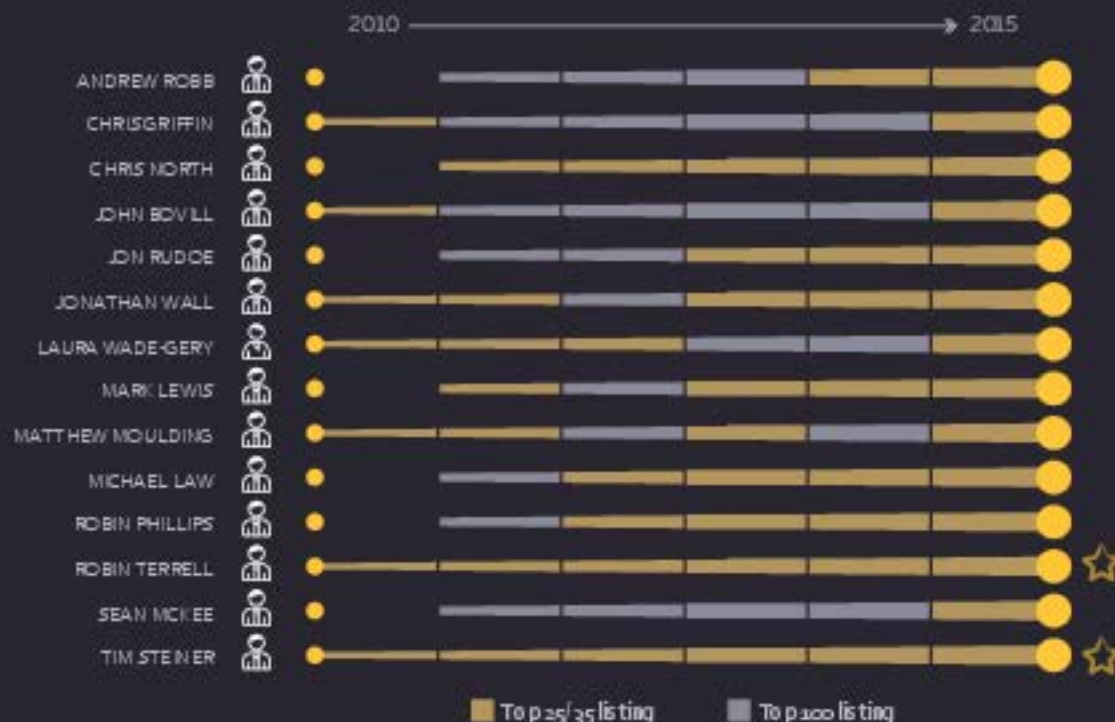


The **Movers & Shakers** all-stars regularly featured across 6 years

14

2010

2015



## The Key & Methodology

An initial long list of potential constituents of the Top 100 was drawn together over a 12-month period of consultation with a wide range of experts from across all disciplines in the retail industry.

These individuals comprised consultants, technology vendors, service providers, senior recruitment specialists, high-level retailers, advisors and City analysts whose expertise encompassed all aspects of the sector.

The carefully selected Advisory Panel then helped to reduce this long list down to the Top 100 names and to also select the Top 35 from within this list. The Panel is chosen on the basis of their combined knowledge and expertise covering every part of the retail industry.

The Top 35 names was then given to each of the Panel to score privately on a number of important criteria - innovation, performance over the last 12 months, potential future performance, customer engagement, future business leader potential, and Multi-channel strategy. By collating these scores a ranked Top 35 list was created.

To highlight the different skill-sets of the individuals in this year's report all the non-retailers have again been grouped under relevant headings: service providers/enablers, consultants/recruitment specialists, and investors/non-executive directors.



### Moving up

Where you see this symbol the entrant has plainly been applying themselves to the world of retail, moving up in position compared to the 2014 report.



### One to watch

Energy, excitement with a touch of the retail factor about them. Keep an eye on this entrant as we think they will be capable of greater things.



### New entrant

Say hello and welcome to this entrant who is obviously doing the right thing, ping-ponging into the Multi-channel retail top 100 movers and shakers report.



### Moving down

A change of role or commercial position? May be a change of environment? ...either way this entrant has slipped down the scales since 2014.



## The Movers & Shakers Top 100 Advisory Panel

**Andy Harding** |  
Chief Customer Officer  
HOUSE OF FRASER

Recently took the newly-created position of chief customer officer at House of Fraser as his responsibility at the group increased. This follows a number of positions held that have seen him amass a wealth of digital experience. This began at Carphone Warehouse in 2000 and took in the position of director of Multichannel and accounts sales at Ryman.



**Jonathan Wall** |  
Group e-Commerce Director  
SHOP DIRECT

Prior to joining Shop Direct in 2010 to head up its e-commerce function he held the CEO position at Flowersdirect.co.uk and before that he was marketing director at Dabs.com, which he joined during the dotcom boom in 1999.



**Alison Lancaster** |  
Interim Marketing Director  
BRAVISSIMO

She has held a number of interim positions in recent years following a career involving many Multichannel and digital roles in executive positions at an array of retailers including White Stuff, Feather & Black, Harrods, Charles Tyrwhitt and John Lewis.



**Vince Gwilliam** |  
Senior Partner  
BRIDGEPOINT

Having joined Bridgepoint in 1987 he is now a senior partner and a member of its consumer sector team with responsibility for the business's retail investments. He presently sits on the board of Pret A Manger and has been involved with Hobbycraft, Pets at Home and Adams Childswear.



**Steve Robinson** | CEO  
ACHICA

He has been CEO at Achica since April 2014, having accumulated vast digital experience while in senior executive roles at B&Q, Matala Direct and Tesco Direct, which he set up. This followed an early retail role at Argos where he was finance director.



**Christina Starkey** | Consultant  
ODGERS BERNDTSON

Joined the London office of Odgers in 2006 and now focuses on the recruitment of senior executives across a broad range of functions in the retail sector – with Multichannel roles increasingly prevalent. She previously worked within a family-owned private investment group.



### Additional special thanks to:

**Martin Newman** | Founder and CEO  
PRACTICOLOGY

**Orlando Martins** | Founder & CEO  
ORES.A EXECUTIVE SEARCH

**Will Treasure** | Director of Technology & Operations  
JAVELIN GROUP

**James Bilefield** |  
Non-Executive Director and Investor

As well as building a portfolio of early stage investments, he holds a number of advisory and board positions including McKinsey & Company, Farfetch, Ticketscript, The Cambridge School Company, and the London Science Museum. Prior to this he was president of digital at Condé Nast and earlier held managerial positions at Skype and Yahoo!



**Kate Walsh** |  
Head of Retail and Consumer Practice  
RIDGWAY PARTNERS

She set up the retail and consumer practice at Ridgway Partners in 2012 and built it up through appointing numerous senior executives in all disciplines of retail and providing ongoing advice to clients. Kate will be joining the retail practice of Russell Reynolds Associates, the global search firm, later in the year with the title executive director.



# The top 35 breakdown



Read on to discover more about our Retail Movers & Shakers of 2015

## The top 35 Movers & Shakers

What a year it has been, the tremendous level of dynamism in the industry is reflected in this latest Movers & Shakers report, so much so that this year the number of ranked names has been expanded from 25 to a Top 35, to give greater visibility of the individuals who are making a difference in the world of Multi-channel retail.

"The Top 35 names include a tremendously varied mix of individuals from across the entire industry, including some lesser known names from smaller retailers as well as investors and non-executive directors because they are all vitally important to ensuring Multi-channel retail continues to evolve, innovate and disrupt, and therefore stays relevant for today's (and tomorrow's) ever more demanding customers".

Glynn Davis





01



**Angela Ahrendts** |  
SVP - Retail & Online Stores

APPLE

It has certainly been an impressive career to date with Ahrendts making a name for herself in the digital world for her cutting edge work at Burberry where she melded the physical and virtual so well that it became the benchmark for retailers. She is bringing this to bear at Apple, which she joined in 2014, and one of the first examples of her efforts involve bringing the Apple Watch into the brand's portfolio.



02



**Chris North** | UK Managing Director  
**Ajay Kavan** | VP - Special Projects

AMAZON

Always on the move, Amazon has recently opened a glitzy fashion studio in London that signifies its intent with clothing and expectations grow about the launch of a food home delivery service. North continues to quietly lead efforts in the UK and is assisted by VP of special projects Kavan who has certainly been involved with developing the food side of the business since he joined the Amazon in 2011.



03



**Sebastian James** | CEO  
**Andrew Harrison** | Deputy CEO

DIXONS CARPHONE

When Dixons and Carphone Warehouse merged there were some doubters but there is no disputing the quality of the James and Harrison double-act in both driving synergies while also positioning the business for the future. It has undoubtedly benefited from being the last man standing but it is a much stronger man than previously envisaged now that James and Harrison have been kicking it into shape.



04



**Dan Heaf** | Senior VP - Digital Commerce  
**Sarah Manley** | CMO

BURBERRY

One year in the business and Heaf has helped keep Burberry at the front of the digital fashion pack. He is one of a number of quality executives bringing digital skills from outside retail (he is ex-BBC Worldwide) that is pushing the sector on. He will no doubt benefit from the skills of Manley who has been with Burberry since 2005 and has played a part in all its digital activities.



05



**Brian McBride** | Chairman  
 ASOS & WIGGLE

Former managing director of Amazon who helped build the business in its early years in the UK. McBride has parlayed this experience into multiple non-executive director roles that presently include the chairmanship of both Asos and Wiggle along with a senior non-executive position at AO.com and senior adviser to Scottish Equity Partners.



next

06



**Simon Wolfson** | CEO  
**Michael Law** | Group Operations Director  
 NEXT

There is no doubt that every activity in Next has the imprint of Wolfson on it. He has played a major role in championing the cause of the Directory business and helped it grow into the most significant online clothing operation in the UK. Half year sales to end-July were up 7.5%. Law has been his long-time adversary in helping Next deliver on its ambitious Multichannel objectives.



07



**John Roberts** | Founder  
 AO.COM

Roberts has found himself spending much time defending the business from its high valuation to flotation when he'd rather be spending it on customer service as this is at the heart of the company. As well as the personal touch he also uses technology to great effect - through social media and texts - to keep customers up to date on their deliveries, which means they enjoy a seamless experience.



08



**Simon Mottram** | Founder & CEO  
 RAPHA

Rapha is the creation of Mottram and it simply sells cycling clothes and accessories. But it does it in such a classy way. From the design of the goods, to the smart website, and the stylish stores with their in-store cafes it all suggests quality and provenance. He has committed on little and all the parts work extremely well together - just like a good quality racing bike.



09



**Anthony Fletcher** | CEO  
 GRAZE.COM

Using his experience at pioneering brand Innocent Drinks, Fletcher has really pushed Graze.com onto another level since joining in 2009. Moving over from marketing to running the business in 2011 he has made great strides in both broadening the product offer and successfully expanding into the US. The next big move involves stretching the brand from a box delivery scheme to having its snackled goods appear on supermarket shelves.





10

Federico Marchetti | CEO

YOOX/NET-A-PORTER

The merger between Yoox and Net-A-Porter has created a real European powerhouse of online luxury fashion that will undoubtedly make waves in the sector. Also not afraid of causing a few ripples is its CEO Marchetti (founder of Yoox) who seems to relish being a hard operator. This will no doubt cause some polarisation of opinions within Net-A-Porter, which will inevitably lead to some fall-out. Regardless of how much he rocks the boat, he is definitely one to watch.



12

John Walden | CEO

Bertrand Bodson | Chief Digital Officer

HOME RETAIL GROUP

There is no doubt that the digital stores concept has been a massive success for the group's Argos business and has given it a new lease of life. Integral to its future is the hub and spoke fulfilment model that Bodson and Walden are eagerly developing. Their earlier skills gained outside the retail sector are helping them redefine the company.



11

Nick Beighton | CEO

ASOS

With founder Nick Robertson stepping down in September to become a non-executive director at the company he founded, the top job has been given to former COO Beighton who has been with the business since 2006. His appointment has been widely welcomed as he has been closely involved in the key decisions at the business for some time. The question will be whether under Beighton Asos loses some of the entrepreneurial zeal that Robertson brought to it in bucket-loads.



13

José Neves | Founder and CEO

Andrew Robb | COO

FARFETCH

Another funding round (raising \$86 million) in March gave the business a valuation of more than \$1 billion, which is a pleasant affirmation of the strategy employed by Neves and Robb in building an online marketplace that brings together fashion products from boutiques around the world. The launch of a global click & collect service adds a bit of multi-channel to the mix.



#9 Anthony Fletcher | GRAZE.COM



14

Rowan Gormley | CEO

MAJESTIC WINE

Recently installed as CEO of Majestic Wine following its acquisition of Gormley's innovative Naked Wines business that has used the internet and social media to create a new model for selling wine that has expanded onto the international stage. With plenty of entrepreneurial character the hope is that he can use this to ignite the digital aspects of Majestic.





15

**Mark Lewis** | Retail Director  
**Paul Coby** | CIO

JOHN LEWIS

The company continues to experiment with the Multi-channel model and is not afraid to go against the flow as evidenced by its decision to charge for click & collect. Lewis has recently been promoted to a role that adds stores to his online responsibility. He has a willing collaborator in Coby who is a champion of innovation, which is seeing the group continue with its start-up incubator JLAB among other things.



16

**Andy Harding** | Chief Customer Officer  
HOUSE OF FRASER

Harding continues to drive a plethora of innovation at House of Fraser including using Beacon technology in mannequins, undertaking a tie-up with Caffè Nero for a click & collect store, and introducing a queue management system. None of this is to show as online is very much the growth engine at the firm as it expands overseas including into its parent company's base China.



17

**Andrew Livingston** | CEO - Screwfix  
**Michael Durbridge** | Director of Omni-Channel - B&Q  
KINGFISHER GROUP

Screwfix has been a major force online at Kingfisher with its initiatives feeding into the rest of the group and leading the charge there is Livingston who has been its CEO since 2012. Compatriot Durbridge is bringing about great change at key brand B&Q where he is part way through a comprehensive five-year Multi-channel overhaul that will give the business great digital capabilities to complement its store portfolio.



18

**Matthew Moulding** | CEO  
THE HUT GROUP

There have been some question marks in the past over the acquisition-hungry strategy of Moulding and The Hut Group but the last couple of years have been a period of consolidation that has strengthened the group. And there is no doubting the quality of the investor base and big names around the board room table that clearly recognize Moulding's capabilities and potential.



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**Mike Hancox** | CEO  
IDEAL SHOPPING DIRECT

With an extremely impressive pedigree in mail order Hancox brought these skills with him to Ideal Shopping Direct in 2008 where he has delivered a successful turnaround of the business. It is a leader in shopping via TV (though flagship channel Ideal World) and has melded this with sales over the internet to create a fast growing Multi-channel operation.



20

**Jonathan Wall** | Group e-Commerce Director  
**Alex Baldock** | CEO  
SHOP DIRECT

Wall relishes the challenge of innovating at Shop Direct and has benefited from an early call on a mobile-first strategy, the introduction of a user experience lab, and working with start-ups in the UK and Israel. His appetite for pushing the group forward is helped by the commitment of Baldock, the supportive CEO for the past three years, who has taken the business into profitability.







21

**Sean McKee** |  
Head of e-Commerce & Customer Services  
SCHUH

Just like the business itself, McKee is a low-key self-assured operator. There is great attention to details down by his team that ensures all aspects of the group's Multichannel model work. But the company is not afraid to try some interesting things as shown by its work with Google to create an augmented reality game for playing in its stores.



22

**Stan Laurent** | CEO  
PHOTOBOX

Long-standing CEO Laurent has doggedly carved out a strong position for Photo Box that now consists of a number of brands including Hofmann, Posterjack, Sticky and Moonpig, which the company acquired back in 2011. It has a commanding position in the personalised market and the opportunities for growth are evident in a category that clearly has long-term advantages for digital players.



23

**Tim Steiner** | CEO  
OCADO

Ocado certainly polarises opinion but there can be nothing but a universal view that Steiner is a formidable leader of the online grocery firm. It continues to be a pioneer and as such it has hit many bumps in the road. The latest involves the drive to secure another grocery partner in a deal similar to that it signed with Morrisons. Meanwhile, Steiner has always ensured the business maintains its tremendous customer service standards.



24

**Doug McCallum** | Chairman  
PHOTOBOX & THETRAINLINE.COM

McCallum has extensive experience dating back to Intel and Apple in the 1980s and taking in Capital Radio and eBay along the way where he helped turnaround its European business. Now with multiple roles he is non-executive director at Ocado and chairman of both The Trainline.com and PhotoBox.



“It has certainly been an impressive career to date with Ahrendts making a name for herself in the digital world”

#1 Angela Ahrendts | APPLE

“Knowing his way around the digital universe gives Harrow plenty of credibility in the market”

#35 Simon Harrow | ELEVAATE



25

Luke Kingsnorth |  
e-Commerce & Marketing Director  
CHARLESTYRWHITT

It's very much becoming a shirt-selling juggernaut that marries all the channels together in a coherent manner, helped by the work of Kingsnorth who has been with the business since 2000 having done a stint at John Lewis online. He has added the marketing director role to his earlier pure e-commerce responsibility that gives him plenty of control over the business in two key areas that are proving increasingly complementary aspects of Multichannel.



26

Tony Preedy | Marketing Director  
LAKELAND

Lakeland is very much about the products – which most people love. But as well as having a constant stream of new lines the company has also ensured that its Multichannel proposition works smoothly. Leading its activity in this area is Preedy who joined the firm in 2008 with solid experience gained from Otto UK and Shop Direct.



27

Robin Terrell | Chief Customer Officer  
TESCO

Tesco has continued to pile responsibility onto Terrell – who at one point was running the whole of the UK business. Now with a new title following his time as the group Multichannel director, which he took when joining from House of Fraser in 2012, his remit is broad and touches on all aspects of the business that engage with the customer. Much of this is now focused on the plumbing rather than glitzy add-ons.



28

Jon Rudoe | Digital & Technology Director  
SAINSBURY'S

With a remit that now covers technology and digital, Rudoe is perfectly placed to ensure the company uses IT to deliver real benefits to customers. This is manifesting itself in a move to enable shoppers to utilise their mobile phones more fully in-store. A payment option is likely to be added soon. The experience he gained at Ocado is still of value in guiding his strategy.



29

Danny Rimer | Partner  
Neil Rimer | Partner  
INDEX VENTURES

There are probably few digital investment opportunities that don't pass across the desk of the Rimer brothers at Index. Criteo, Nasty Gal, Just Eat, Etsy, Asos, Farfetch, LoveFilm, Metapack and PhotoBox are among the many businesses to have received funds from Index, which has over the years built up a terrific reputation in Europe and at the heart of its success are the Rimers.





30

**Laura Wade-Gery** | Executive Director - Multi-channel  
**David Walmsley** | Director - M&S.com  
 MARKS & SPENCER

Things have been picking up for M&S' online operation since its early issues when it moved off the Amazon platform. The focus on content online should be applauded as this is a real differentiator for brands like M&S. Wade-Gery is a forceful presence pushing through serious change at the company and with the well-respected Walmsley assisting then the relevant skill-sets are certainly in evidence for the business to be a truly strong Multi-channel presence.



31

**Siobhan Fitzpatrick** |  
 e-Commerce & Marketing Director  
 MAPLIN

Well regarded Fitzpatrick joined Home Retail Group where she was responsible for a growing amount of Multi-channel activity across Argos and latterly at the group's Homebase business where she was director of Multi-channel from 2013. From September she takes up a similar role at Maplin and is definitely one to watch.



32

**Robin Phillips** | Multi-channel Director  
 BOOTS

Phillips built the Waitrose online business and late last year joined Boots to reignite the organisation as a Multi-channel operation. He has the overarching role of evangelist that involves him in both the technology aspects of the business as well as the important cultural changes. He has two important lieutenants helping him in Tony Rhine and Kash Mahmood.



33

**John Bovill** | IT & e-Commerce Director  
 MONSOON ACCESSORIZE

Bovill has been a well respected operator for some time having spent a number of years at the innovative Aurora Fashions - within IT and business development roles. A move to Jacques Vert involved more operational responsibility and this led him to take a dual role at Monsoon Accessorize in 2013 that blends operational e-commerce with technology, which utilises his broad skill-sets.



34

**Chris Griffin** | Founder & CEO  
**Matthew Purt** | Director - Sales & Business Dev.  
 ANATWINE

Revolutionising the way fashion brands work with fashion retailers is the bold aim from Griffin who founded Anatwine in October 2013. He has already attracted the likes of Adidas, Next and House of Fraser to his integrated platform as well as investment from Zalando and a team of well known retail executives to its board. Purt has become an integral part of the Anatwine story since joining in mid-2014.



35

**Simon Harrow** | CEO  
 ELEVAATE

Knowing his way around the digital universe gives Harrow plenty of credibility in the market as he looks to grow Elevate and its proposition that gives retailers and suppliers more control over their digital shelf space. He is also an investor in Hach with some of the team from Kiddicare where he was COO before its purchase by Morrisons.



## A-Z The Recognised Retailers

Chosen from our long list and deservedly included in the Top 100 Movers & Shakers, these individuals have been recognised for

- their innovation
- performance over the year
- potential future performance
- customer engagement
- future business leader potential
- Multi-channel strategy

*They are listed here in alphabetical order by the organisation employing them.*

### Steve Robinson | CEO

ACHICA

Robinson is using all the skills he has gained - running M and M Direct, Tesco Direct and B&Q online - at flash sales site Achica where he is working hard using data analytics to bring more personalisation to the offer sent to customers. Despite the challenges he recognises the massive potential in the lifestyle category for the brand.

### Ken Ardali |

Director of International e-Commerce

ALIBABA GROUP

There is no escaping the presence of Amazon and it might well become the same with Alibaba Group, which is making a serious play beyond its home market of China. In charge of its European marketplace operations is Ardali who has experience with eBay and Grand e-Bazaar. Expect to see more of Ardali and Alibaba.

### Beth Butterwick | CEO

BONMARCHÉ



It has been something of a turnaround at Bonmarché under the guidance of Butterwick who joined the business in 2011. Developing the online operation has been an important part of the strategy she brought to bear, which resulted in the flotation of the firm less than three years after it had been acquired by Sun Europe Partners. Growth continues, with online sales jumping 31.4% in the quarter to end-June. She is one to watch for the future.

### Mahmud Kamani | Co-Founder & CEO

Carol Kane | Co-founder

BOOHOO.COM

After a rocky early period as a quoted company sales have picked up in recent quarters as the marketing campaigns have started to hit home. The two co-founders remain at the helm and will be looking to further push up the group's overseas sales as competition online intensifies.

### Richard Houlton | Director of Channels UK & ROI

Dave Elston | Head of e-Commerce

CLARKS

It plays the game quietly in the UK but Clarks is a brand with truly global appeal and this is helped significantly by its online presence. Both Houlton and Elston have been with the retailer for some time, which undoubtedly suits the style of Clarks that prefers to take a conservative approach rather than rocking the boat. This continues to work well for the brand and its increasingly Multi-channel strategy.

### Ross Clemmow | e-Commerce Director

DEBENHAMS

The challenges have continued at Debenhams but Clemmow has continued to push the e-commerce aspects of the business. Although there have been no major developments to report this past year his experience in the industry (chiefly at Argos) makes him a valuable player at the firm.

### Nick Dutch | Head of Digital

DOMINO'S PIZZA GROUP

Dutch plays a key role in the ongoing digital activities of Domino's which have made it one of the most progressive online operators, with a significant amount of its sales coming via PC and mobile. The latter now accounts for 52% of web sales and the Domino's app has been downloaded 20 million times. A key responsibility of Dutch is to personalise the marketing that is sent to these online customers.

### John Browett | CEO

DUNELM



There is no disputing the pedigree of Browett who has held a number of senior roles at Tesco, Dixons, Apple briefly, and Monsoon Accessorize. In each position his remit involved growing non-store sales. This will be integral to his new role at Dunelm as the company has recognised its need to develop a more Multi-channel model. Browett is regarded as the man to deliver this and he is without doubt one to watch.



## Angus Thirlwell | Co-Founder

HOTEL CHOCOLAT

Boundary-pushing retailer Hotel Chocolat continues to be led by its entrepreneurial founder Thirlwell who is very much the driver of its innovations and initiatives that ensure it stands out from the competition. He has created a vertically integrated Multi-channel brand that successfully straddles retail and leisure & hospitality. For sure, he will have other surprises planned for the future.

## Gillian Drakeford | Country Retail Manager

IKEA UK & IRELAND



Since returning to the UK to head up IKEA in this country (after seven years running IKEA in China) Drakeford has been tasked with developing the group's digital activities. She has hit the ground running with the opening of the first smaller IKEA store and is investigating alternative delivery options. Her successful initiatives in the UK will likely be rolled out around the world.

## Richard Longhurst | Co-Founder

Neal Slateford | Co-Founder

LOVEHONEY

After a blaze of publicity following the company's reality TV appearances and the go Shades of Grey publication things have settled down at Lovehoney. But sales continue to grow rapidly overseas with a 146% increase in 2014 to £5.1 million. Longhurst and Slateford are now looking to raise funds for expansion into the US.

## Chris Morton | Co-Founder

LYST



Lyst is one of the UK's hottest fashion stores, with its delivery of a personalised shopping experience that is made possible through its partnerships with leading brands and lots of numeric crunching. It is the brainchild of Morton who is pushing for global growth, helped by a recent fundraising of \$40 million from some high profile venture firms.

# 1<sup>st</sup> 14 23

The first female number one Mover and Shaker

All Stars who have consistently pushed the boundaries across the past 6 years

New entries who make their first appearance or a welcome comeback

## Ning Li | CEO

MADE.COM

The recent fundraising has put some wind in the sails of furniture retailer Made.com that is ably led by Li who has been enjoying some success with expansion around Europe. There has also been an increasingly Multi-channel approach taken that e-commerce showrooms being added that comfortably mix digital technology with physical products.

## Jonathon Brown | CEO

MANDM DIRECT

The online discount clothing website continues to benefit from the expertise of Brown who last year helped its private equity owners sell the business to Denmark-based Bestseller. With a price-focused approach Brown has had to work hard to differentiate the proposition in the marketplace but he undoubtedly has the necessary skillsets to deal with the task.

## Nitin Passi | Founder & CEO

MISSGUIDED

Since founding the company in 2009 Passi has built it into an online poster child with £50 million of sales. Although he is planning investment in new technology he is also now selling his clothes through stores (via Nordstrom in the US and Selfridges in the UK) to embrace a more Multi-channel approach. Overseas sales are increasingly important to the group and have grown 89% over the past two years.

## Mark Newton-Jones | CEO

MOTHERCARE



Having more than proved his credentials over 10 years at Shop Direct Newton-Jones took on the role of CEO at Mothercare in March 2014 during a troubled period for the group. Although it is still very early days in his turnaround of the company there is sufficient evidence of success for him to be one to watch in his new role.

## Simon Belsham | CEO

NOTONTHEHIGHSTREET.COM



Belsham unexpectedly moved from Tesco where he had been since 2002 (apart from a brief stint at Ocado) – latterly as online director. He has taken up the CEO role at Notonthehighstreet.com that will present him with many new challenges but his experience will stand him in good stead. He is one to watch in his new role.

## Sally Hopson | CEO - Home Vet Group

PETS AT HOME



One of the key growth areas for Pets at Home is its services division that comes under the responsibility of Hopson who joined the business in 2008 from Asda where she had been a senior executive for 14 years. She also handles store and format development that places her very much in the Multi-channel development aspect of Pets at Home – especially considering 40% of online sales were collected in-store over the past year.

## Top 100 Sector breakdown

Sectors that the top 35 and A-Z entries operate in



BEAUTY & HEALTH

DEPARTMENT STORES & MULTI-RETAILERS

FASHION

GROCERS & FOOD

HOME & DIY

LEISURE & SPORTS

SERVICES

TECHNOLOGY

TOYS & GAMES

TRAVEL

**Nish Kukadia** | CEO  
SECRETSALES

Kukadia co-founded Secrets Sales in 2006 and has had a busy past year in the CEO seat with losses narrowing by 40%, sales jumping 39% to £25 million, and the securing of an extra £3 million of funding that is being used to double the company's technology team. Improved customer targeting of offers and personalisation are high on his agenda.

**Jon Wragg** | e-Commerce Director  
SUPERDRY

Another escapee from the major supermarkets, Wragg moved across to Superdry in April 2014, and is busy building the group's significant online capability and the world that presents many challenges. He undoubtedly has the requisite skills and can call on clothing experience at George at Asda and Shop Direct to help.

**Clare Gilmartin** | CEO  
THETRAINLINE.COM

With contactless payments on the increase, train travel never been more popular, and digital ticketing taking off, these are exciting times for Thetrainline.com. Heading up the business for the past year has been Gilmartin who joined the business from eBay where she gained a lot of respect helping grow its operations in the UK and Germany. She is one to watch as she grows the ticketing firm.

**Tania Foster-Brown** |  
Marketing & Communications Director  
SELFRIDGES

It created something of a shock when Foster-Brown moved from Arcadia to Selfridges this year. Although she has a marketing director's title this will inevitably be closely aligned with the digital activities taking place at the department store so she will have a remit that crosses all channels. This makes her one to watch.

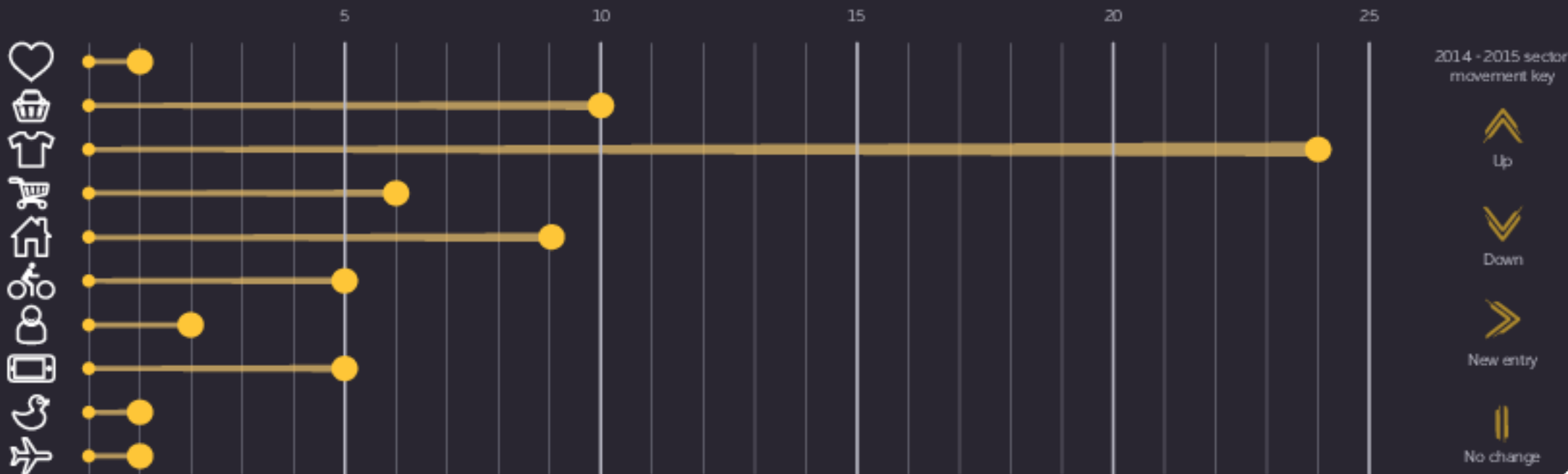
**Duncan Grant** | Director of Multi-channel  
THE ENTERTAINER

When it looked like there was trouble in the toy category Grant helped build The Entertainer into the UK's largest independent toy retailer. Mixing stores with a strong offer online and click & collect, along with go-minute delivery, has helped the business carve out a strong multi-channel presence.

**Dom McBrien** | Multi-channel Director  
THE WHITE COMPANY

Experienced digital practitioner McBrien pitched up at The White Company in late-2013 to develop the business's multi-channel proposition, which takes it from its traditional store-focused approach. He has brought skills from his time at Arcadia and M&S to the present role.





### Kate Walmsley | Digital Director TOPSHOP

With digital experience dating back to 2000 (when at pioneering online agency A&Q&A) Walmsley has employed her expertise to great effect at Arcadia's flagship brand Topshop where she moved up to the role of digital director in April 2013. The brand continues to play around with augmented reality and social media to engage with its young core shoppers.

### John Ashton | Multi-channel & Marketing Director TRAVIS PERKINS

Newly installed at Travis Perkins, Ashton brings a wealth of experience from his time at Clinks where he was head of Multi-channel retail and prior to that he held numerous e-commerce positions at Screwfix, Hamleys, Fagleaves and John Lewis. He is one to watch as he tackles the DIY sector.

### Stefan Barden | CEO WIGGLE

There is unprecedented growth in cycling in the UK at the moment but there is also plenty of competition so Wiggle has not had everything its own way. But it has maintained its position as leader through its extensive product offering online. Barden's remit remains focused on using his experience from Northern Foods to drive significant growth at Wiggle and part of this is its international expansion, with some early success being enjoyed in Australia.

### Neil Sansom | CEO WOOLOVERS.COM

He recently moved into the leader's role at Woolovers.com shortly after it was acquired by Langholm Capital, which will have aggressive growth plans for the business. Sansom is recognised here for his time at Moss Bros where he was initially head of e-commerce and he helped turn the retailer around to the point that it is now reporting impressive sales figures. Latterly he was promoted up to omnichannel director.

### Joe Murray | Co-Founder Richard Tucker | Co-founder WORLDSTORES

It has been a busy year for Murray and Tucker as they have raised £25 million in funding that is being used to develop their own next-day delivery service for bulky items via 300 vehicles and they purchased Kiddicare last September. As well as selling through numerous websites and the Worldstores site the pair have also been building Modern and Casafina as retail brands.

### Robert Schütze | Country Manager UK ZALANDO

Zalando is developing its online fashion business at a ticking pace across Europe and heading up its presence in the UK is Schütze who took on the role in early 2014. He brings consumer brand experience from Roland Berger consultants, Henkel and Bosch and is likely to play a growing role in the UK as evidenced by the stake the firm has recently taken in Anavim that confirms its presence in this country.



## Enablers Supporting & Inspiring UK Retailers

These individuals represent enablers that continue to thrive on the changing needs of consumers and in turn help the retailers included in this report to achieve success.

*They are listed here in alphabetical order by the organisation employing them.*

# Over 200

companies featured  
since 2010

### Ross Bailey | Founder

APPEAR HERE



Utilising the power of the internet Bailey is cleverly disrupting the landlord/retailer relationship by enabling retail space to effectively be booked in the same way as a hotel room. He has empowered small retailers looking for short leases and filled voids in shopping centres and high streets. He is definitely one to watch.

### Duncan Olby | Senior Director

APPLE PAY



Ahead of the launch of Apple Pay the company brought in the experienced Olby in September 2014 who has spent many years in the payments and loyalty world with Visa, PayPal, Lloyds TSB, Air Miles and British Airways. He looks to be just the person for the role of pushing the virtues of Apple's new payment solution in the UK market.

### Neil Ashworth | CEO

COLLECT+

Click & collect is still growing at a cracking rate and Collect+ is playing a major part in fuelling the success of this tried and trusted solution to the last mile issue. As Ashworth has been at the company for nearly three years and continues to use his logistics experience to add more convenience stores (currently around 5,600) and retailers to the Collect+ service.

### William Shu | Co-Founder & CEO

DELIVEROO



A recent \$70 million fundraising will have put the wind behind the mopeds delivering the thousands of take-away orders for customers of Deliveroo, which was co-founded by Shu in 2013. The service delivers for around 2,000 upmarket restaurants and expansion across the UK is underway as online transactions now account for 40% of all food delivery orders.



## Tim Robinson | CEO

DODDLE

Steeped in the rail and logistics industries Robinson is the perfect leader for Duddle that involves dedicated parcel shops located in train stations. They tap into the phenomenally successful click&collect concept combined with locations for collection at extremely convenient rail locations. With thousands of train stations Robinson knows the opportunity is huge.

## Dwain McDonald | CEO

DPD

DPD continues to set the pace with its initiatives and driving the train is McDonald who seems to relish bringing innovation into the problematic area of the last mile. Utilising smart phones its Follow My Parcel was a groundbreaking way to track deliveries and he reckons the next step will be to track the location of customers in order to complete the delivery.

## Sarah Calcott | COO

## Tanya Lawler | VP - Marketplaces

EBAY UK

Integral to taking eBay away from its auction site heritage to becoming a more traditional retailer are Calcott and Lawler. The former has been at eBay since 2010, which she joined from B Sky B, while Lawler joined the company in late 2012 from Sainsbury's in order to head up its marketplace business and she has cut some important deals including the tie-up with Argos.

## Nicola Mendelsohn | VP - EMEA

FACEBOOK

Mendelsohn joined Facebook in 2013 with the big job of running a hefty chunk of its non-US business. She comes with a stack of experience in the advertising industry including running her own business (Karmaama) and holding various board level roles (including Grey London and Diageo), which will come in very handy as she helps Facebook achieve its targeted advertising objectives.

## Martijn Bertisen | Director - Retail

GOOGLE UK

Long-time Google citizen Bertisen heads up the sales role within the retail sector division for the US online behemoth, which makes him an important player in the industry based on Google's broad spread of activities. The company took a knock with the failure of its Glass but the business is massively important and Bertisen is becoming the go-to man for retailers.

## Carole Woodhead | CEO

HERMES PARCELNET

Having worked at Grattan from 1987 to 2001 Woodhead is vastly experienced in mail order and she brought these skills to Parcelnet in 2003, which now operates as Hermes in the UK. Much of her recent attention has been around overseas expansion as she recognises this is where her firm's clients are heading. She also continues to grow the company's Parcelshops.

## Patrick Wall | CEO

METAPACK

Wall founded Metapack at the height of the dotcom boom and he still leads the business towards its aim of delivering vital fulfilment solutions (via its software-as-a-service model) to large retailers. A recent expansion into Asia pushes the firm's footprint beyond Europe and the US.

## Michael Ross | Co-Founder & Chief Scientist

ORDERDYNAMICS

Ross likes nothing better than to dig deep into the analytics of retail where many others fear to tread. An MA in Mathematics and formative experience at Fiegleaves prepared him for setting up eCommena that has since been rolled into OrderDynamics. He is as much respected for his advice and non-executive roles as he is for the day job.

## Cameron McLean |

Managing Director for UK & Ireland

PAYPAL

The recent split from parent company eBay will provide challenges and opportunities for PayPal and McLean, who has been with the company since 2005, as it looks to reinforce its position in the marketplace as newcomers like Apple Pay enjoy all the attention and start to gain some traction. If, and how, McLean's role will change remains to be seen.

## Graham Cooke | Co-Founder & CEO

QUBIT

Experience at Google was the perfect preparation for Cooke and other ex-Googleers to set up the analytics house Qubit, which has been expanding at a significant rate in the UK as well as in the US following a \$26 million fundraising. Growth hit 362% in the first half of 2015 as Qubit signed up some big time retailers to its data-first services.

## Jo Bertram |

Regional General Manager UK & Ireland

UBER

Hardly a day goes by without Uber appearing in the newspapers having caused some disruption or other. But taxi strikes aside, the business has major objectives with logistics and fulfilment that will undoubtedly affect retailers, and heading up the UK set up is Bertram who we will no doubt see more of in the future.

## Peter Keenan | CEO

ZAPP

It has been a bit of a waiting game for Zapp – the mobile payments solution that has some of the top banks signed up. Apple Pay has been taking all the publicity but Keenan has great confidence that when Zapp finally launches it will hit the ground running such is its simplicity and the big players it has involved.

## Consultants & Recruitment Specialists

These are the most influential consultants in the retail industry today, and the leading recruitment specialists working at the heart of the sector to make things happen in the world of Multi-channel.

*Listed alphabetically by their surname.*

**James Gurd** | Founder  
DIGITAL JUGGLER



As well as founding e-commerce and digital marketing consultancy Digital Juggler in 2011 Gurd has also taken on part-time roles at the likes of House of Fraser. His experience from Bette Wain and Robert Dyas has helped guide his consultancy's work with clients including Selfridges, The Wine Society and Sweaty Betty.

**Clare Johnston** | Founder & Joint-CEO  
THE UP GROUP

Founded in 2007 by Johnston, the Up Group specialises in global digital talent and aims to help retailers solve the many serious issues around Multi-channel. The group has worked with numerous big name clients and hosts the glitzy annual Digital Masters Awards.

**Alison Lancaster** | Interim Marketing Director  
BRAVISSIMO

Massively experienced player in the multi-channel world Lancaster is presently working with Bravissimo, which is the latest in a long list of retailers that have sought her counsel as they battle with embracing multi-channel. Her previous ports of call include Bonmarché, White Stuff, Morrisons, Feather & Black, and Charles Tyrwhitt.

**Martin Newman** | CEO  
PRACTICOLOGY

As the CEO of Multi-channel consultancy Practicology and a non-executive director of Conviviality Retail, White Stuff and Wiggle, Newman is a growing presence in the industry whose experience and expertise is in widespread demand. Practicology has continued to grow and is now a major consulting force since Newman founded it in 2009.

**Christina Starkey** | Consultant  
ODGERS BERNDTSON

Joined Odgers in 2006 as a researcher before quickly moving into the retail practice as an associate and then as a consultant where she specialises in recruiting senior executives across the full spectrum of retail disciplines – with e-commerce and Multi-channel now featuring prominently.

**Kate Walsh** | Head of Retail & Consumer Practice  
RIDGEWAY PARTNERS

Having set up the retail and consumer practice at Ridgeway Partners in 2012 Walsh has built up a strong franchise appointing numerous senior executives. A growing number of these involve Multi-channel and digital expertise and Walsh is busy building up great credibility in this part of the market.



## New Movers & Shakers for 2015

Welcome to all the innovators, thought leaders and retail experts listed for the first time, as well as those returning after a short break from the top 100.



## Investors & Non-Execs

A mix of private investors and specialists at investments firms along with influential non-exec directors with multiple roles.

This list comprises the most prominent figures currently investing in the retail industry and experienced directors who are helping retailers navigate the challenging digital journey.

Listed alphabetically by their surname

**Harry Briggs | Simon Calver | Rory Stirling**  
Co-Founders

BUSINESS GROWTH FUND

The recently created Business Growth fund has a 200 million dedicated to investing in early stage UK technology companies and managing the fund are three experienced practitioners. Calver ran LoveFilm before becoming CEO of Mothercare, while Briggs has latterly worked at Balderton where he invested in The Hut Group, Lyst and Tictail, and Stirling was an investor at MMC Ventures where he backed Reevoo, Hub bub and Appear Here.

**Bill Currie | Co-Founder**  
**Iain McDonald | Co-Founder**

WILLIAM CURRIE GROUP

It might be low-key but its investments have been anything but as former City retail analysts Currie and McDonald have backed some high profile names including Asos, and The Hut Group. Other investments include Eagle Eye, Occa-Do-me, Metapack, Big Dude Clothing and Anarwine.

**Mark Evans | General Partner**  
BALDERTON CAPITAL

Long-standing venture capital player, having joined Benchmark in Silicon Valley and moved to London with the firm in 2002 where it became Balderton in 2007, Evans is now general partner. He has had a hand in numerous investments and his present portfolio includes Appear Here, The Hut Group and Worldstates.

**Karen Hanton |**  
Private Investor

Having founded online restaurant booking service Toptable and selling it in 2010 for \$55 million, Hanton then began backing and supporting various internet start-ups. She is presently an investment partner in Profounder Capital and an investor in JustAddRed where her investments include Hii Space and Pets Pyjamas.

# “Harding continues to drive a plethora of innovation at House of Fraser”

#16 Andy Harding | HOUSE OF FRASER

## Brent Hoberman | Chairman FOUNDERS FORUM

With Lastminute.com long behind him, Hoberman has successfully co-founded and advised businesses such as Made.com as well as created Founders Forum, that is a mix of events that bring together entrepreneurs and investors, consultants, and executive search firms. He also exerts influence through sitting on a Government digital services board.

## Anders Holch Povlsen | CEO BESTSELLER

Made his name and fortune from fashion retailer Bestseller but Povlsen has influenced the UK market via his stakes in online clothing sites Zalando and Asos and the recent purchase of Matala Direct. As owner of a privately held company, Povlsen has the freedom to make further such investments that could see him have an even greater impact on UK online retail in the future.

## Jon Kamaluddin | Chairman ATTERLEY ROAD

Having spent a formative 30 years at Asos, half of which was spent masterminding its successful overseas expansion, Kamaluddin now has the financial and intellectual resources to invest and advise a variety of web-based companies. He is a board member at Atterley Road, Klarna, Peoplebox and The Secret Linen Store.

## Robin Klein | Partner Saul Klein | Partner THE ACCELERATOR GROUP

The Accelerator Group has been operating as an investor and adviser since 1995 when Robin Klein was a pioneer in backing internet businesses. With vastly experienced son Saul actively involved too, the pair operates an influential operation. Expect to see them take part in many deals including those of Index Ventures where they both remain involved.

## Lyndon Lea | Co-Founder LION CAPITAL

Highly respected, Lea passed through the halls of some hallowed private equity houses such as KKR and Hicks Muse Tate & Furst before setting up Lion Capital, which has gained a top notch reputation for enhancing the value of retail and FMCG brands. All Saints, Hema, American Apparel and Wagamama have been in the portfolio of late.

## Sir Terry Leahy | Private Investor

As CEO of Tesco, the story of Leahy's executive career is well documented. What is less well known is the prolific level of investment he has made in small digitally-focused start-ups. Often joining forces with William Cunniff Group, Leahy has stakes in Anavine, Stacount, Eagle Eye Solutions, and Metapac among others.

## William Reeve | Co-CEO HUBBUB

Reeve has a CV that is packed with internet-related experience, from co-founding LoveFilm to being head of operations at Paddy Power right through to his current activities that include non-executive chairmanship of Grace.com, an investor in and co-CEO of Hubbub, and a non-executive director at Dunelm.

## Alan White | Chairman HOTTER FOOTWEAR

Since retiring from the CEO role at N. Brown, where White took it on the early stages of its journey from mail order business to being a digital-first retailer, he has taken on a number of non-executive and investor roles including chairman of Hotter, advisor at Fruugo, and non-executive director at DirectWines.

## Peter Williams | Chairman BOOHOO.COM

One of the most experienced operators in retail – especially where it involves digital – having held executive roles including CEO of Selfridges and numerous non-executive positions at Asos, Rightmove, Mister Spex, and Boohoo.com where he presently sits as chairman. Williams' expertise and guidance is massively in demand from businesses of all shapes and sizes.



## Movers & Shakers 2015

Brought to you by retail experts



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