



e-commerce
PARIS 2013
THE CROSS-CHANNEL EVENT



avec

Réussir son e-commerce européen



Susanne Czech, Secretary General, **EMOTA**



Jean Rémi Gratadour, Délégué général, **ACSEL**



James Roper, Chairman & Founder, **IMRG**



Christoph Wenk-Fischer, Chief Executive, **BVH**



Johan Eriksson, Business Developement, **Svensk Distanshandel**



Thierry Petit, fondateur, **Showroomprivé**



Jörgen Bødmar, Founder, **Scandinavian Design Centre**



Le 26 septembre 2013



Johan Eriksson, Digitalist



Swedish e-tail Association

+19% 2013

Strategic

Industry development for

Swedish Digital Retail.

Business- Intelligence

E-tail barometer
Online Food
Industry KPI:s

Network

Ecommerce day
CxO-summit
B2B -konferens
E-fokus logistics

Industry Lobbying & PR

Payment & Security
Cross border trade and Roll-out
Logistics and sustainability
Competence development



Google?

Competence

Digital DNA

Compliance, Distance selling law

10 000 e-tailers

1 000 professional companies

100 Members

650 Trust mark members

130 Business Partners

e-asier!

Simplifying the online shopping eco-system.

Digital Revolution

← The Golden Age →

← The connected economy →



VoC - reach
10
people



VoC - reach
100
people



VoC - reach
1000
people

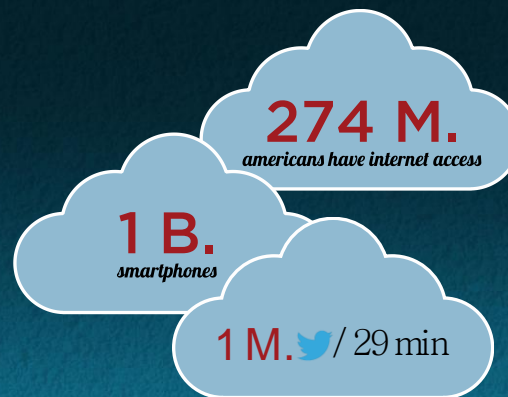
time

Manufacturing age
1900-1960

Distribution age
1960-1990

Information age
1990-2010

Customer age



power



Always
connected

Rise of
social media

Abundance
of merchandice



THE POWER
TO DISCOVER



THE POWER TO SHARE
VIEWS FAR AND WIDE



THE POWER TO SPEAK UP
AROUND THE CLOCK



THE POWER TO BUY FROM
ANYWHERE, ANYTIME



THE POWER
TO COMPARE



According to a recent Nationwide survey:
**MORE DOCTORS SMOKE CAMELS
THAN ANY OTHER CIGARETTE**

DOCTORS in every branch of medicine—113,197 in all—were queried in this nationwide study of cigarette preferences. These leading research organizations made the survey. The gist of the query was...What cigarettes do you smoke? (Page 1)



Your "C-Zone" Will Tell You...
If You Taste...

BE
authentic



BE
digital



FOCUS
on relations

Customer Decision Journey



Social media is an important channel/tool for conversion



54%

Of the consumers view social media as an important or very important source of information in a digital purchase.

41%

Consider friends and family as an important or very important source of information in a digital purchase.

Drivers of e-commerce?



Price transparency

Assortment

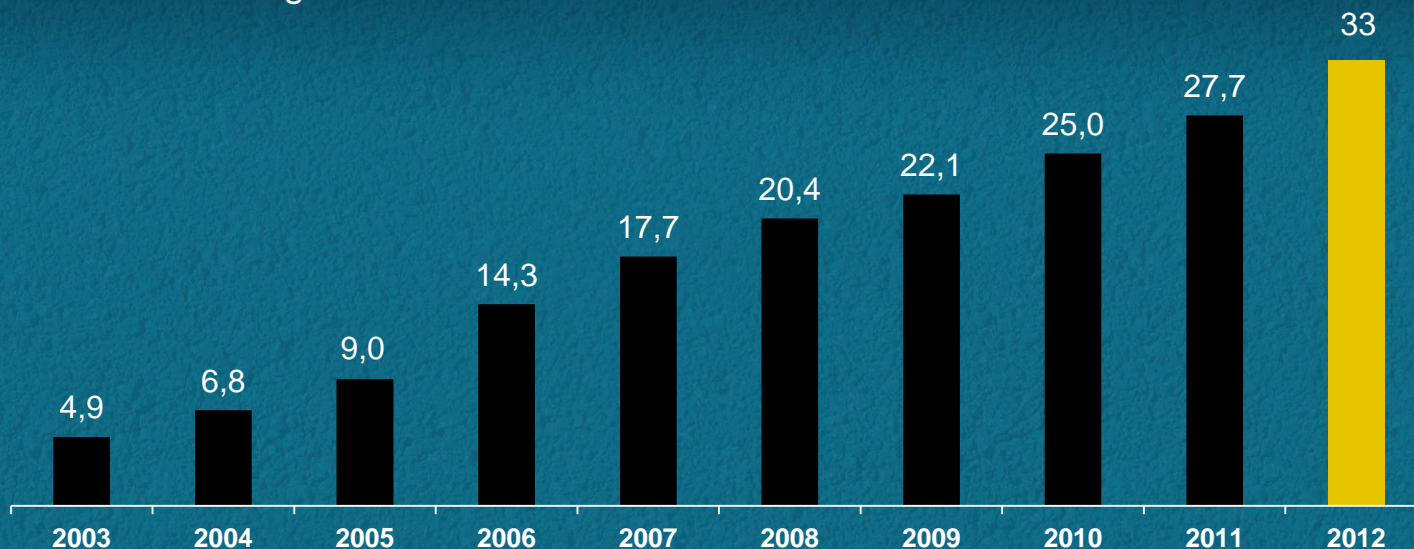
Convenience

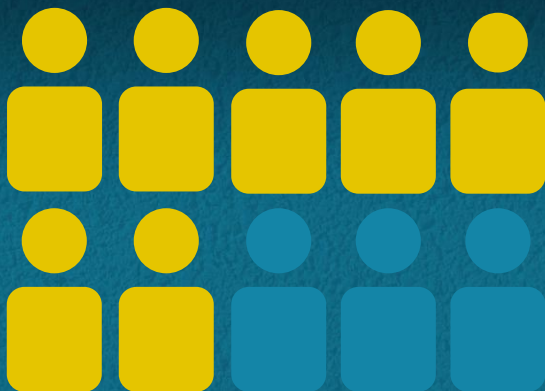
Anonymity/ Low engagement

No recession in the e-commerce sector!



Year on Year growth





7 / 10 consumers bought goods online during Q4 2012.

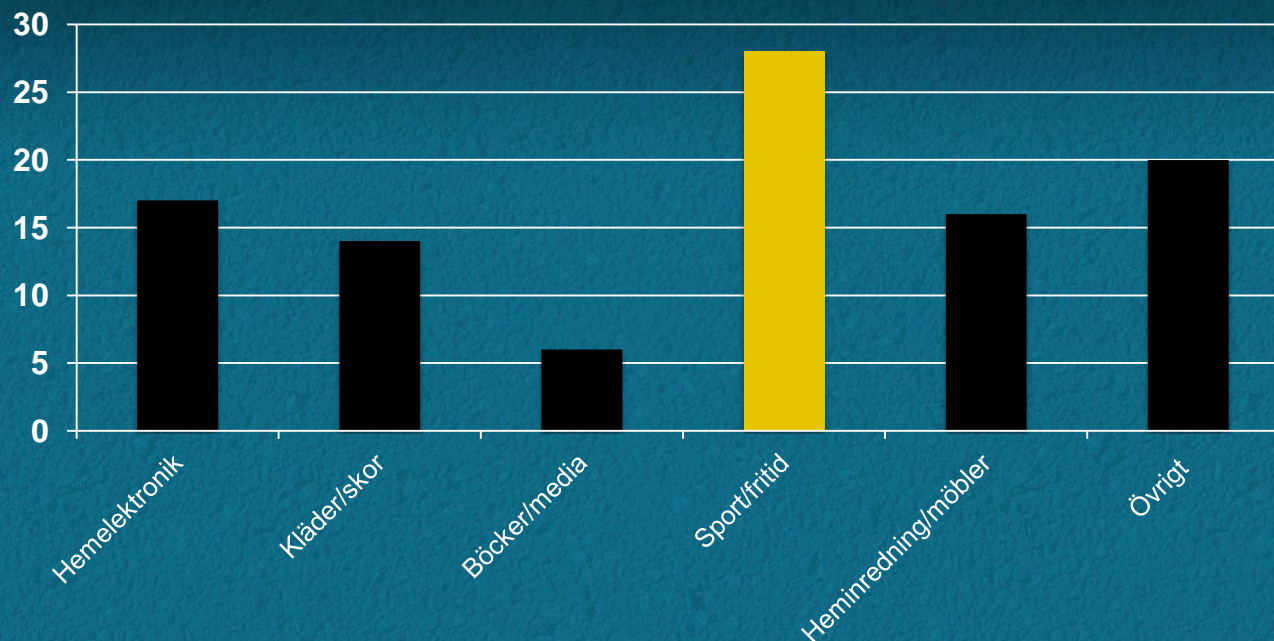
6/10

6 / 10 e-tailers handelsföretag grew their sales during Q4 2012 compared to 2011.

Sport & Leisure is growing the most



Growth Q4 2012



The Nordic people are shopping online



95

Billion spend the Nordic consumers.

8/10

Consumer were shopping online. 3 / 10 shop online each month.

6088

Is the average yearly spend the Nordic shoppers are doing.

30-49

Is the age group for the most spending.



What do we want to buy?



Home electronics

78%

Makes research
ONLINE before
purchase

47%

Makes the transaction
ONLINE

78%

Collects via pick up
network services

APPERAL

32%

Makes research
ONLINE before
purchase

19%

Makes the transaction
ONLINE

34%

Collects via pick up
network services

FURNITURE

32%

Makes research
ONLINE before
purchase

4%

Makes the transaction
ONLINE

45%

Collects via pick up
network services

What is store, what is communication?



Multi channels can be profitable



20%

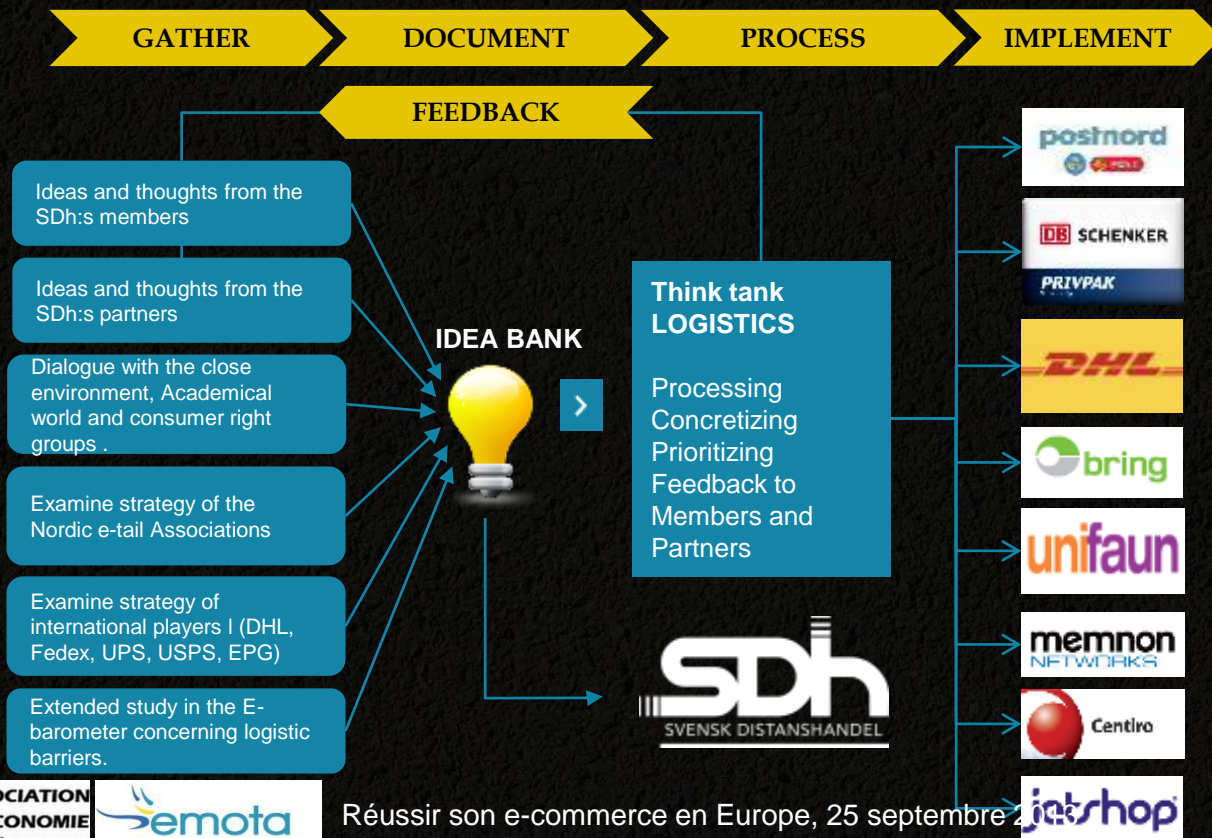
Would spend more with their favorite retailer if they would offer sales in more channels

35%

Makes impulse driven purchase online.

69%

Has sometimes bought a product online that they would have planned to buy inStore.



From 15% to 20% of the none food sector



**Last mile
driven by the
customer**

**Faster and
smarter
returns**

**Pick up and
delivery
Saturday &
Sunday**

**Higher
delivery
/receiving
Experience**

**Marketing the
E-commerce
Channel**

**Faster and
safer delivery
to Europa**

**Distribution
of
groceries**

**Home
Delivery**

**Better
infrastructure
with the
consumer**

**Sustainable
and climate
smart**

**Support to
companies
that adds e-
commerce
channel**

**Collect-in-
store**

**3PL
especially
for
E-commerce**

**Same day
delivery/
locally**

**Safer
Deliveries**

Faster and safer delivery to Europe

E-commerce becomes more international and the Swedish e-tailer needs better tools!



Issues

- The international e-commerce, primarily within Europe becomes a more substantial business for Swedish Ecommerce.
- Swedish ecommerce are perceived as high quality players in a international perspective- But is inhibited by poor logistic solutions.
- Swedish ecommerce players are experiencing that the logistic solutions aren't up to standard in order to compete with local market players .
 - a. Delivery takes to long time
 - b. Quality flaws and deficiencies
 - c. Track´n trace has deficiencies
 - d. Price levels outbound to Europe is high compared to inbound from Europe and to the Nordics.
 - e. **Return processes (if they exist) are none sufficient**

Solutions

- Restart building the international logistic networks
- Change local logistic partners which has insufficient performance within the larger networks
- Faster international mail/letters
- The logistic companies should have better local knowledge about the European services companies that already exists

Benefits consumer

- Swedish customer will benefit if the the Swedish e-tailers becomes more internationally competitive

Benefits e-tailers

- Many, especially niche players need the international volumes to reach economics of scale and better purchasing power.

Benefits logistic companies

- The logistic company that can be able to establish a solution for the European market that is comparable with the local quality of service will gain a substantial competitive advantage. And thereby avoid the global players getting foothold in into the Nordic market.

Critical success factors

- Technology standardization
- International clearing systems
- Should be able to use cheap capacity – Sweden is a net – importer
- Be able to work with direct link directly into Europe

Delivery and pick up during weekends

The offline stores are opened 7 days a week- so should the e-tailers be!!



Prio!

Issues

- The offline stores turn around high volumes during weekends.
- The Saturday is the day were most consumers are reachable at home
- Pick up places are normally open all days of the week.
- The logistic companies distribution systems and investments aren't fully utilized and thus creating higher price levels due to inefficiency.

Solutions

- A unbiased investigation should be commenced directly of the possibilities to be able to deliver Saturdays
 - a. To pick up places
 - b. Directly to door

Should be combined with retail deliveries to store during Saturdays((which is already a fact, Store replenishing)

Benefits consumer

- Orders made during the week can easily be gathered at the pick up point and be delivered during Saturdays when the consumer is mainly at home .
- Orders made in Friday have a relevance for the consumer to be picked up during the week end.

Benefits e-tailers

- Faster delivery
- Increased competitive advantage towards offline competition
- Smoother outbound flow over the whole week.

Benefits logistic companies

- Better use of resources
- Higher volumes can be managed by existing terminals and trucks.

Critical success factors

- Terminal and the distribution network has to be producing on Saturdays. Terminal- och distributionsnät måste producera även på lördagen