

## European eCommerce assessment Maturity of top 200 European e-retailers

R. van de Hoef  
Bussum, 8 maart 2012



# Deloitte. Online Business Innovation



Strategy



Operations



Assurance

---

[www.onlineinnovation.nl](http://www.onlineinnovation.nl)  
[www.werkenbijdeloitte.nl](http://www.werkenbijdeloitte.nl)



Raoul van de Hoef  
Deloitte Consulting

# Agenda

Who leads the European landscape?

What are top performers in each sector?

Are clicks outperforming (online) bricks?

What about Mobile?

State of Dutch e-Retail?

# Our benchmark includes top 200 online retailers from 8 European countries



# Webshops in 8 sectors were assessed on 17 dimensions and 140 criteria

## Storefront

User management

Catalog

Product search

User experience

Shopping cart

## Fulfilment

Place orders

Manage orders

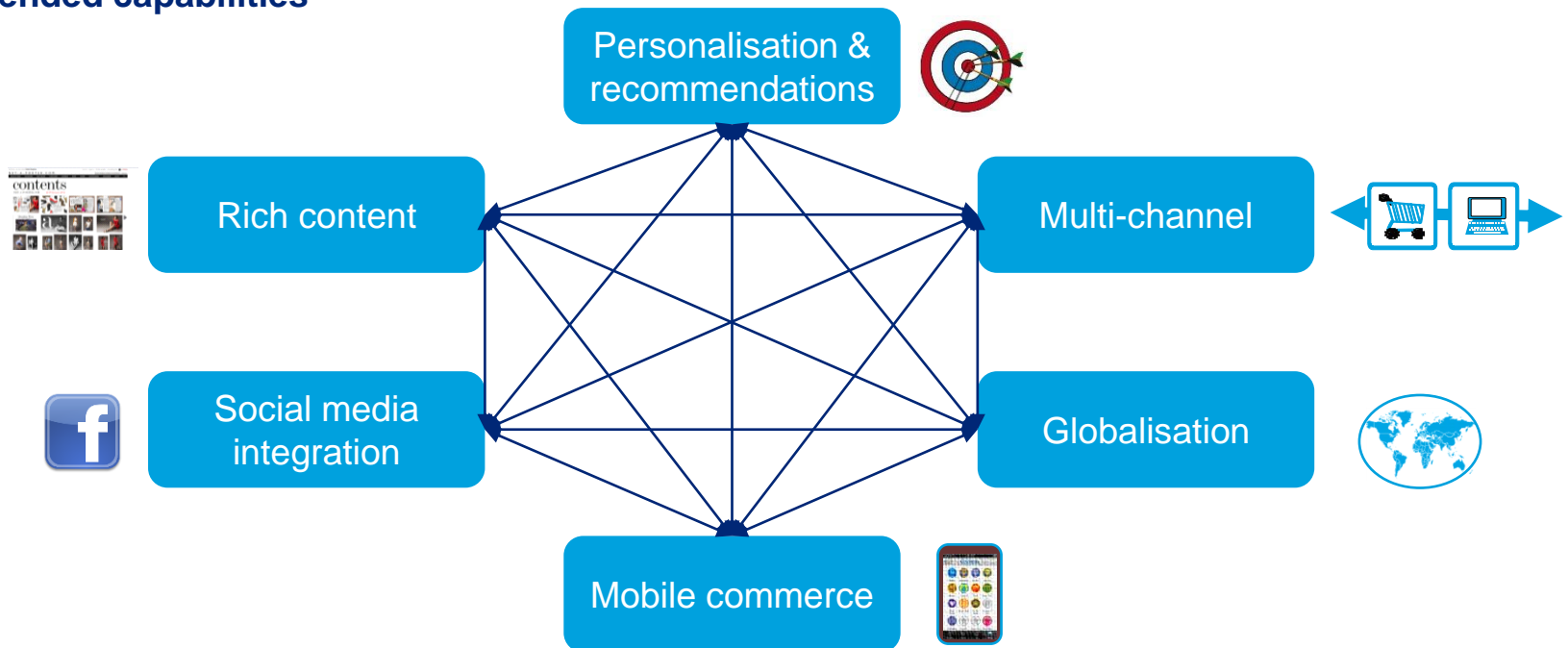
Payments

Shipping details

Shipping & fulfilment

Customer service

## Extended capabilities



Who leads the  
European landscape?

# Southern Europe is strongest on most capabilities, closing in on the US

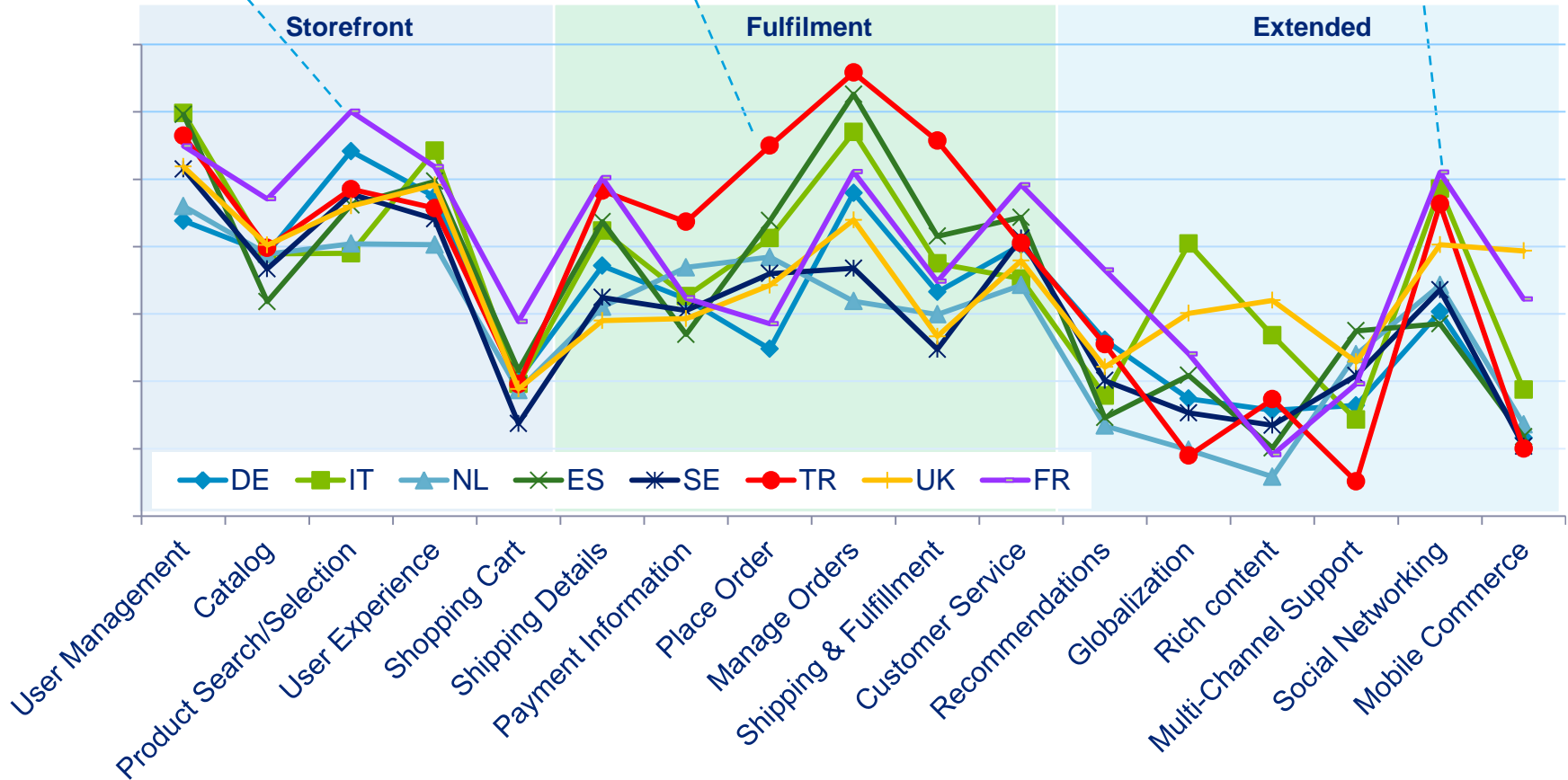
**+** Product search



**+** Order & Fulfilment



**+** Social



# Examples from the leading countries

## Alternate (DE) - Search & Recommendations

The screenshot shows the Alternate (DE) website interface. At the top, there is a banner for '20 JAHRE ALTERNATE seit 1992'. Below the banner, there are navigation tabs for 'Hardware', 'Notebook & PC', 'Software', 'Gaming', and 'TV & A'. A search bar contains the text 'ipad'. Below the search bar, there is a dropdown menu with the following items: 'iPad', '10-W-USB Netzteil für iPad', 'Access Folio Standfuß für iPad2', 'Bamboo Stylus für iPad', 'Bluetooth Tastatur Apple iPad', 'Bluetooth Tastatur f. Apple iPad2', 'ClearScreen Schutzfolie für iPad 2', 'Corium Serie für iPad 2', and 'CallMe'. To the right of the search bar, there is a 'Topseller' button and a 'PC-Konfigu' button. Below the search results, there is a section titled 'Sicherheit & Zahlung' with sub-items: 'Datensicherheit', 'sicher bezahlen', and 'Widerruf & Rückgabe'. At the bottom, there are logos for 'DEUTSCHER PREIS' and 'Sicher zahlen mit PayPal'. The main content area shows a product image of a Corsair GeIL DIMM 16 GB DDR3-1333 Kit with a price of € 79,90\* and two product recommendations: 'LG CH10LS28' and 'Acer Aspire 5560G-8204G50Mnkk'.

## Istanbulism (TR) - On-site track & trace

The screenshot shows a shipping tracking banner for Yurtiçi Kargo. The banner features the Yurtiçi Kargo logo, a truck icon, and the text '1000 LERCE ÜRÜNDE 24 SAATTE KAPYA TESLİM'. Below the banner, there is a text box that reads: 'Tom Gönderileriniz %100 Risksiz, Koşulsuz ve Güvenli Bir Şekilde... 1000lerce Üründe 17:00'a ve 600 Km'ye Kadar Olan Siparişleriniz ERTESİ GÜN EVİNİZDE!'. The banner also includes a small image of a truck and a package.

Mücbir sebepler (Hava, yol muhalefeli vb.), kargo tarafından adrese teslim hizmeti verilmeyen veya belirli gün adrese teslimat yapılan yerler hariç, 1000'lerce üründe 600 Km'ye kadar olan adreslere 1 Günde teslimat yapılmaktadır.

Kargo Takip Numara Sorgulaması:

Müşteri/Alıcı Adı:\*

Ara

\* Aramayı sadece Müşteri ya da Fatura isminden yapabilirsiniz. Lütfen Sipariş numarasından arama yapmayınız!

## Bimeks (TR) – What's up Box

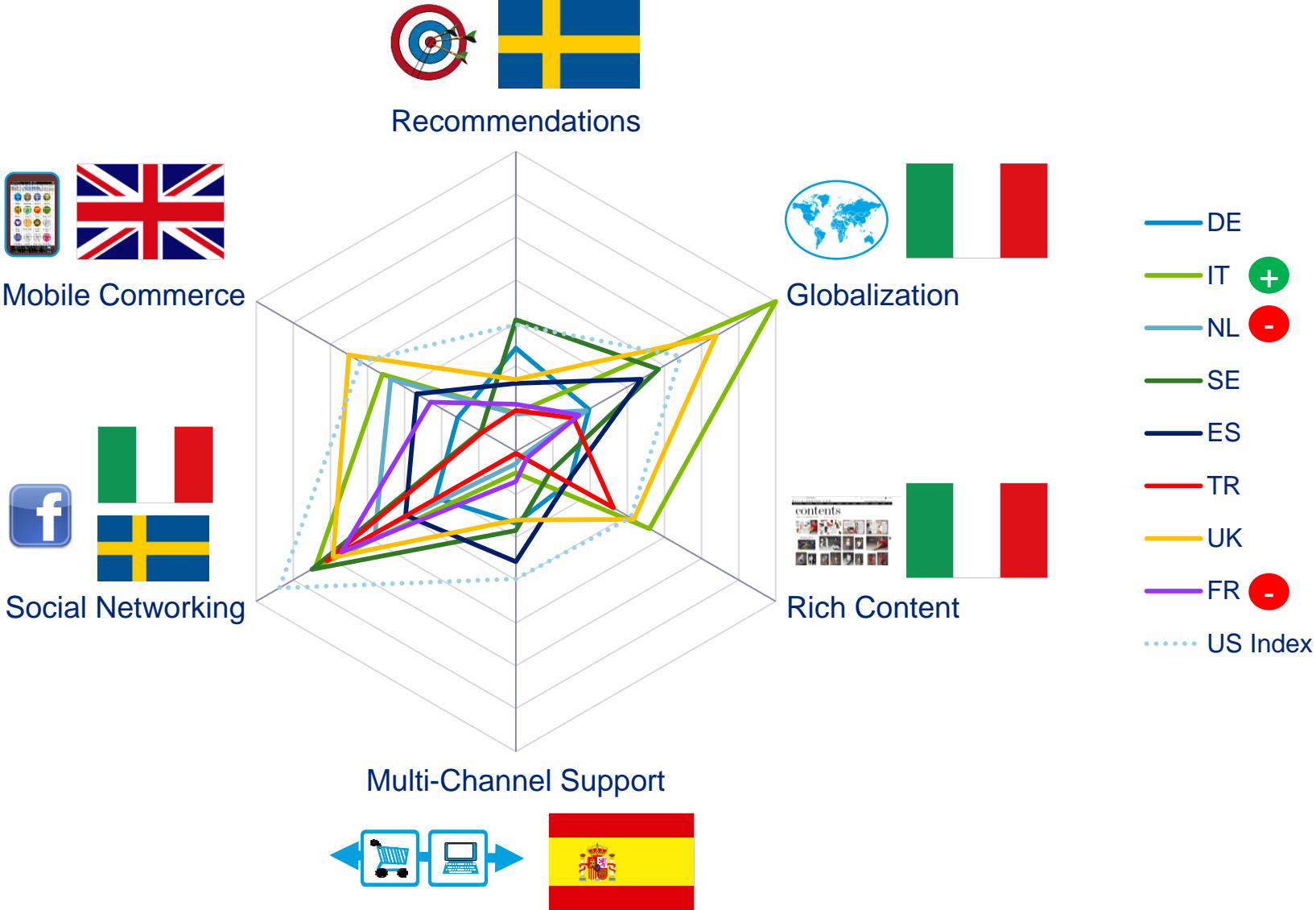
### Bimeks Web'de neler oluyor?

- Oktay K. Sunny SN022L 56 Ekr... satın aldı.
- Naci Ç. 1 saat 54 dakikada siparişini teslim aldı.
- Faruk B. Next 5720 5.0" Navi... satın aldı.
- Burbant L. 2 günde siparişini teslim aldı.
- Erdeniz B. 5 günde siparişini teslim aldı.
- Savaş U. 3 saat 58 dakikada siparişini teslim aldı.
- yasin Jameson USA 6004 Oto... için yorum yaptı.
- Özge K. 1 saat 11 dakikada siparişini teslim aldı.



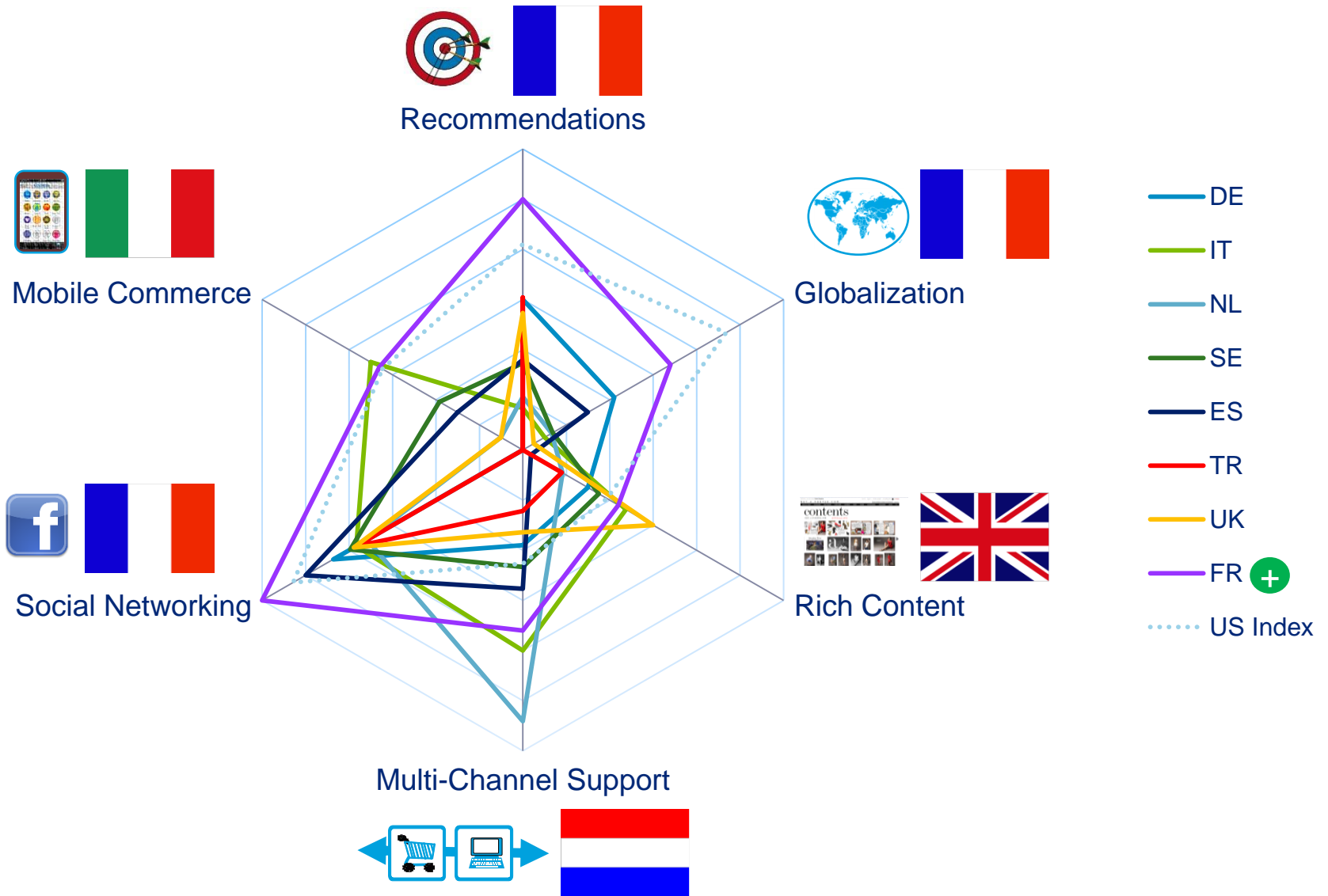
What are top performers  
in each sector?

# Fashion: Italy is (co)leading on 3 of the 6 extended features





# Consumer electronics: Netherlands is leading in multi-channel support



# Best practices in Consumer electronics



## MyCom – Availability in store(NL)

**MyCom Zeist**

Slotlaan 233  
3701GG Zeist  
030-6916959  
zeist@mycom.nl

**Beschikbaar**  
Morgen (dinsdag, 6 maart)

**Winkelvoorraad**  
2 stuk(s)

**Openingstijden**

maandag	13:00 - 18:00
dinsdag	9:30 - 18:00
woensdag	9:30 - 18:00
donderdag	9:30 - 18:00
vrijdag	9:30 - 21:00
zaterdag	9:30 - 17:00
zondag	Gesloten

**Wanneer kan ik het afhalen?**

- Direct
- Morgen (12:00)\*
- Over 2 - 4 dagen\*
- Over 4 - 10 dagen\*
- Onbekend\*

## Price Minister (FR) - Up-sell from shopping cart

**Ajoutez une extension de garantie** [Fermer la fenêtre](#)

**Fujifilm Finepix S2950**  
Fujifilm  
Photo Numérique  
151,11 €  
Produit Neuf

En complément de votre article, PriceMinister vous propose une extension de garantie :

- 23 mois **20,11 €**
- 11 mois **17,60 €**
- 6 mois **15,09 €**
- Aucune

**Continuer**

Achetez tranquille, PriceMinister étend votre garantie !  
- Réparation : Changement des pièces et main-d'oeuvre compris  
- Transport : Frais d'enlèvement et de retour couverts

Pour en savoir plus sur les conditions générales de ventes des extensions de garantie, [téléchargez la notice d'utilisation au format PDF.](#)

## Internity (SP) – Interactive bundling

**Crea tu Pack Internity de Electrónica y/o Accesorios**

Si compras productos de electrónica, accesorios, o electrónica + accesorios, obtendrás importantes descuentos

**Electrónica**

CONSOLA NINTENDO 3DS AZUL AQUA

Elige productos de electrónica (Máx. 4)

**Accesorio/s**

ADAPTADOR DE CORRIENTE Y USB DERTECH PARA 3DS

Elige accesorios (Máx. 4)

**Resumen y Precio del Pack**

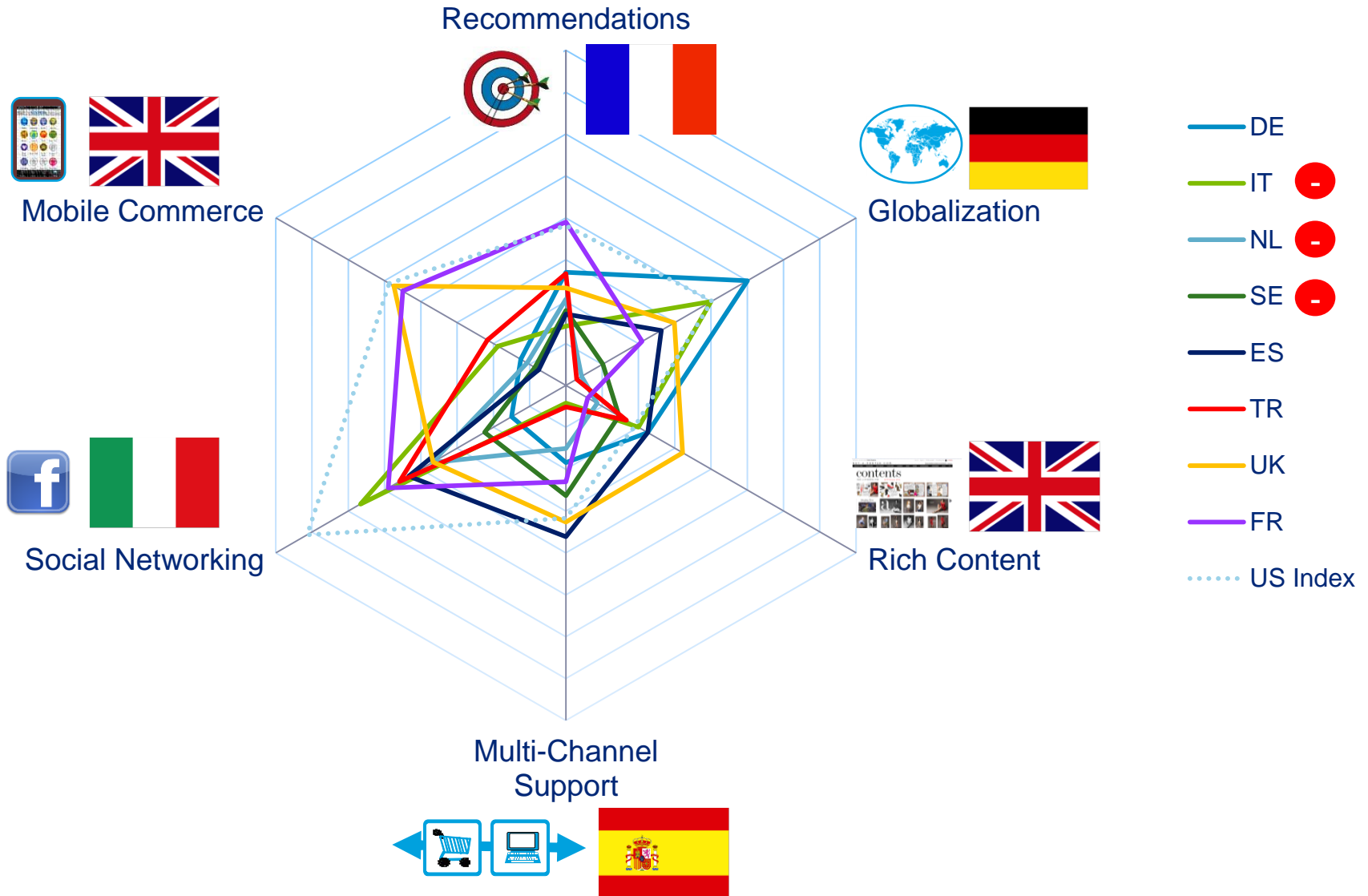
Tu selección actual:  
CONSOLA NINTENDO 3DS AZUL AQUA  
Adaptador de corriente y USB Dertech para 3DS

**185<sup>90</sup>€**

**Te ahorras 3.00 €**

[ayuda para crear tu pack](#)

# General merchandise: UK is strongest on extended features





# Best practices in General merchandise



## Tesco (UK) – Rich content & Offers

**TESCO** baby & toddler

Go to Tesco.com

Offers Pregnancy Baby Toddler All about you Recipes Mums' Choice About the Club Log in Join

Home > Pregnancy

Browse section

- + Getting pregnant
- + Pregnancy
- + Birth

Join Mums' Choice

Rate, review and test products, plus have your say!

Find out more

Help, support and advice for mums

**Pregnancy & birth**  
Everything you need to know about having a baby!

This month:

**What to pack in your hospital bag**  
Read article

Most read

**Offers**

Save £1.98, Was £9.98 now £8  
Pampers New Baby Total Care Mini 62

Any 2 for £8 now £4.40 each  
Huggies Pure Baby Wipes Quads 256

## Debenhams (UK) – Mobile commerce

DEBENHAMS

Use the guides above to line up the barcode.

Home Cancel

DEBENHAMS

Barratts  
Grey Mid High Casual Boots  
£30.00 (was £55.00) ★★★★★

Product Details Wish / Gift List

Range Items View Reviews

Home Share Add To Bag Bag

DEBENHAMS

Showing your nearest stores

Great Yarmouth	134 miles
Norwich	152 miles
Ipswich	159 miles
Broadstairs - Westwood...	163 miles
Colchester	171 miles
Bury St Edmunds	176 miles

Home Local Stores All Stores Bag

DEBENHAMS

comfy  
★★★★★  
lovely comfy boots especially for people who have trouble with their feet. i wore these boots all day and with no sore feet.BRILLIANT!!!! highly recommend them.  
Pleased with purchase  
★★★★★  
Very comfy flat boots, highly recommended  
Good Boots  
★★★★★  
Just what i have been after to replace my old ones. They fit well and are comfy.  
Maria  
★★★★★  
Very nice, warm and comfortable

Close









Home Share Add To Bag Bag



Are clicks outperforming  
(online) bricks?

# Pure players versus Traditional retailers



Country	Pure play % in top 25
TR 	58%
NL 	52%
UK 	33%
FR 	33%
DE 	31%
IT 	25%
SE 	21%
ES 	13%

## Pure play more advanced



- Catalog & product search
- Payments
- Recommendations
- Social
- Mobile



## Traditional retail (online) leading



- Catalog & product search
- Extended features
  - Social (DE)
  - Mobile (FR)
  - Recommendations (UK)



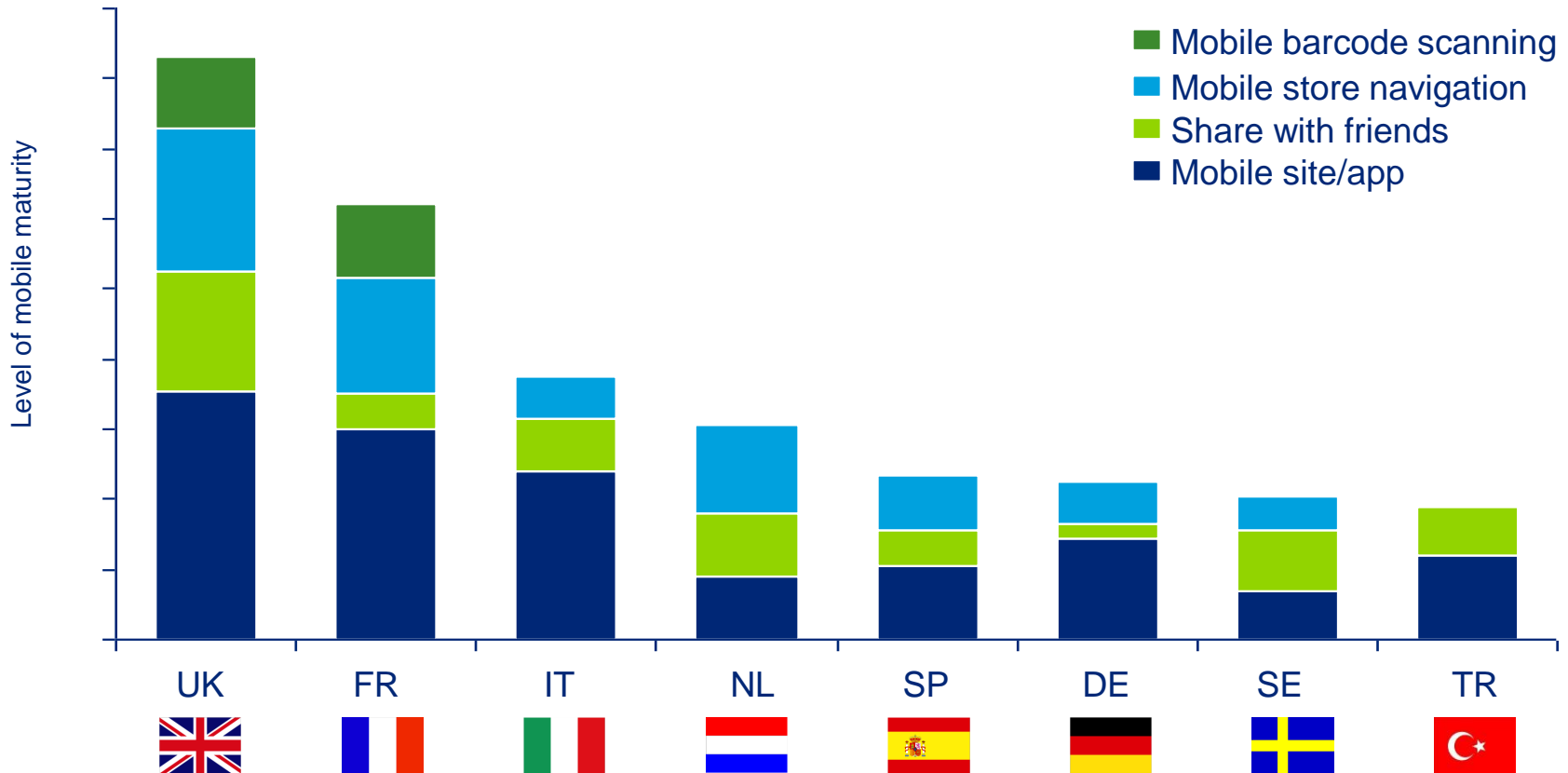
What about Mobile?

# Mobile commerce is most mature in UK and France











General merchandise and Fashion have the most advanced adoption

Consumer electronics falls behind in mobile capabilities



# Top performers in mobile per sector



Consumer electronics	Fashion	General Merchandise
<b>FNAC</b> France    	<b>Topshop</b> UK    	<b>Debenhams</b> UK    
<b>Siba</b> Sweden   	<b>Zara</b> Spain   	<b>Tesco</b> UK   
<b>Mediaworld</b> Italy  	<b>H&amp;M</b> NL   	<b>Argos</b> UK   

 Mobile site/  
app

 Mobile barcode  
scanning

 Mobile store  
navigation

 Share with  
friends

# Mobile best practice

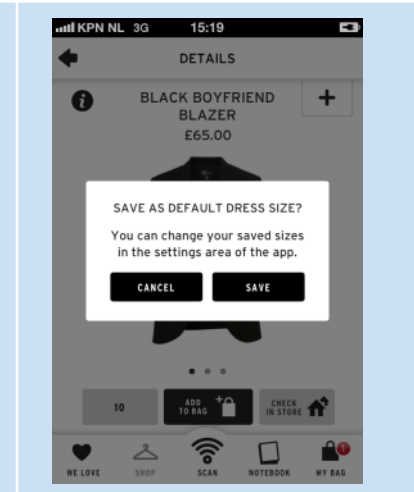
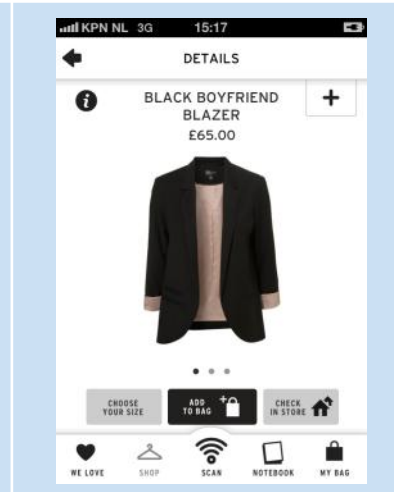
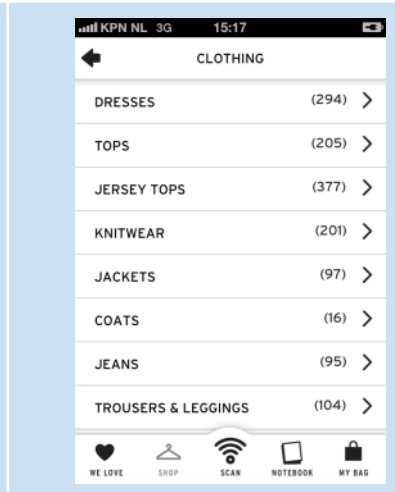


## Topshop (UK)

## Browse catalog

## View products

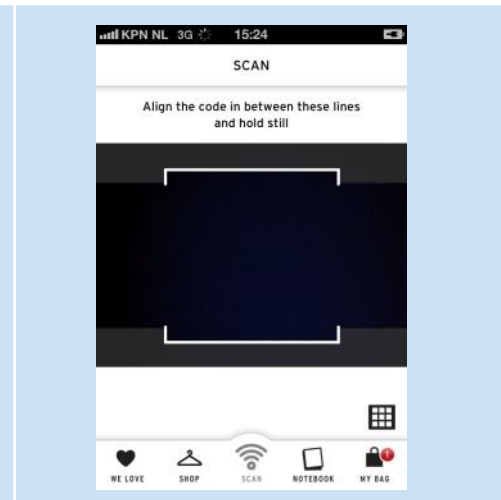
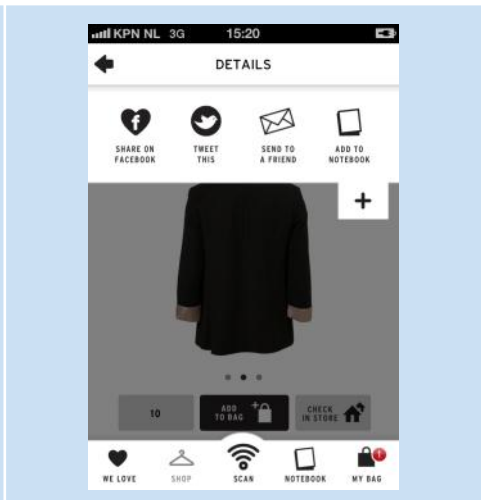
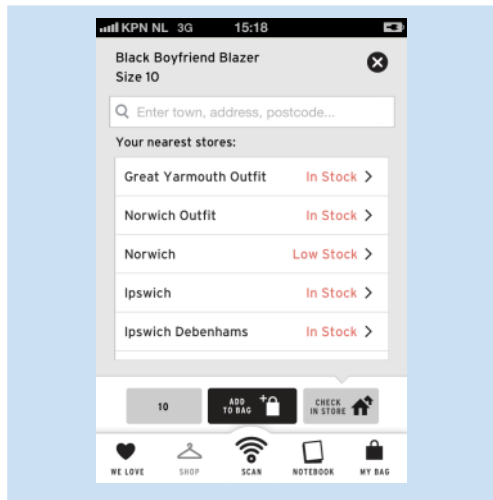
## Remember your size



## Buy or check stock

## Social sharing

## Barcode scanning



# State of Dutch e-retail



# Netherlands – Current state versus European average



**Payment options**  
**Social networking**  
**Mobile commerce**



**Product search & Catalog**  
**Order tracking & shipping**  
**Rich content (virtual models)**  
**Recommendations**  
**Multi-channel**



**Multi-channel**  
(reserve online, pick up, ship to,  
return items to stores)



**Product search**  
(keyword and feature search)  
**Recommendations**  
**Customer service**



**Product search & Catalog**  
(detailed product content  
often with promotions)

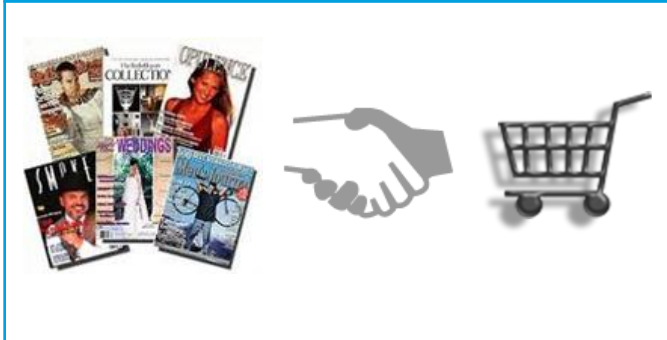


**Order tracking**  
**Rich content**  
**Mobile commerce**

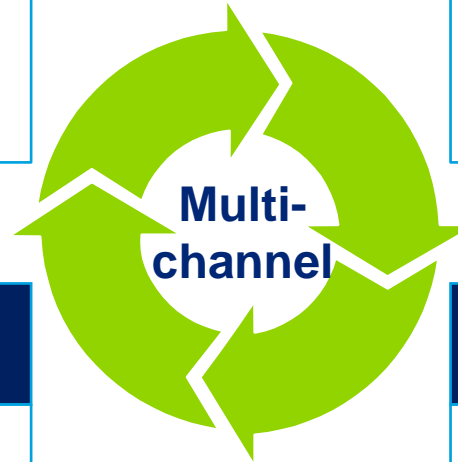
# What to expect – US and UK trends arriving in Europe



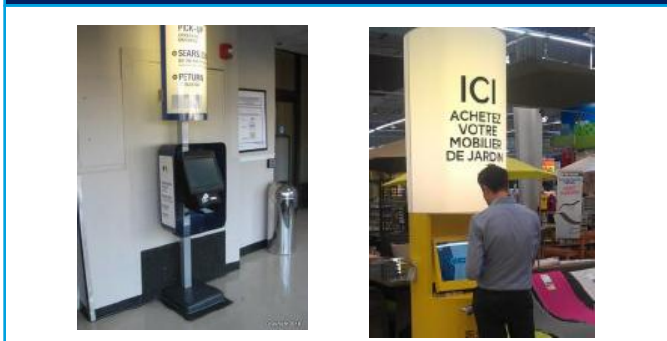
## Content as asset to drive experience



## Data analytics to target customers



## Digital in-store touchpoints



## Internationalisation





Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee, and its network of member firms, each of which is a legally separate and independent entity. Please see [www.deloitte.com/about](http://www.deloitte.com/about) for a detailed description of the legal structure of Deloitte Touche Tohmatsu Limited and its member firms.

Deloitte provides audit, tax, consulting, and financial advisory services to public and private clients spanning multiple industries. With a globally connected network of member firms in more than 150 countries, Deloitte brings world-class capabilities and deep local expertise to help clients succeed wherever they operate. Deloitte's approximately 170,000 professionals are committed to becoming the standard of excellence.

This publication contains general information only, and none of Deloitte Touche Tohmatsu Limited, its member firms, or their related entities (collectively, the "Deloitte Network") is, by means of this publication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser. No entity in the Deloitte Network shall be responsible for any loss whatsoever sustained by any person who relies on this publication.

# Appendix: Benchmark model overview

## Storefront

### User management

Login, user profile, loyalty program

### Catalog

Catalog views, product content, comparison

### Product search

Browse, sorting & filtering, feature search

### User experience

Site performance, security & privacy, accessibility

### Shopping cart

Product availability, backorders, wishlist

## Fulfilment

### Place orders

Order summary, express checkout, gift services

### Manage orders

Order tracking, order history

### Payments

Payment types, billing options, coupons

### Shipping details

Shipping options, shipping date, tax calculation

### Shipping & fulfilment

Delivery appointments, returns

### Customer service

Call center, FAQ, co-browsing, chat

## Extended features

### Rich content

Image search, virtual models, store blogs

### Recommendations

Targeted recommendations, cross/up-sell

### Multi-channel

Reserve online, pick up in store, return to store

### Social networking

Sharethis, Facebook, Twitter, user community

### Mobile commerce

Mobile app, store navigation, barcode scanning

### Globalisation

Localized content, multi currency, regional sizes