

International Multi Channeling

– Strategies and Trends –

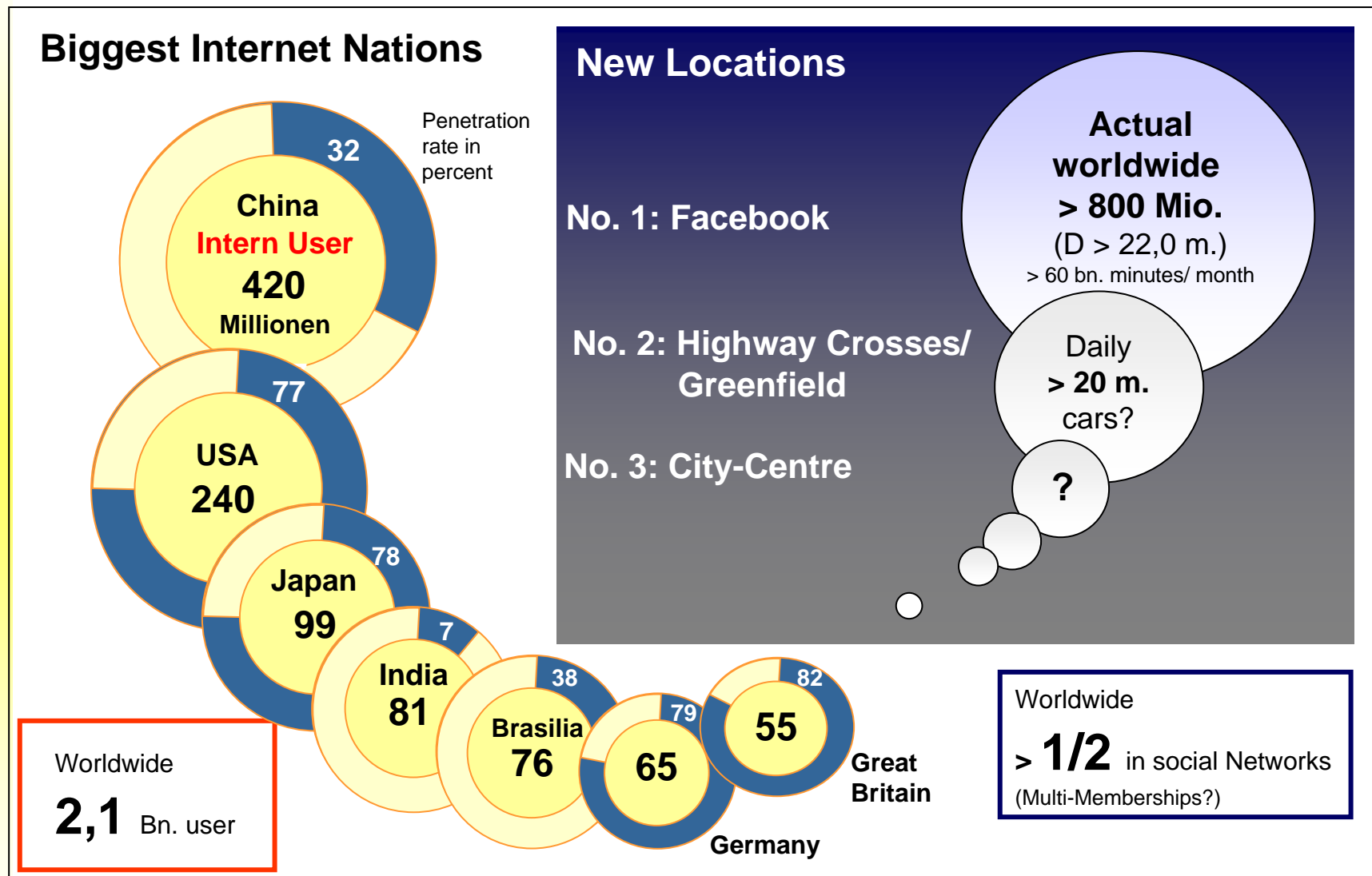
Paris
3rd November 2011

Prof. Dr. Gerrit Heinemann

Internet Usage

as key driver for
Multi Channeling

Unlimited Internet Potential

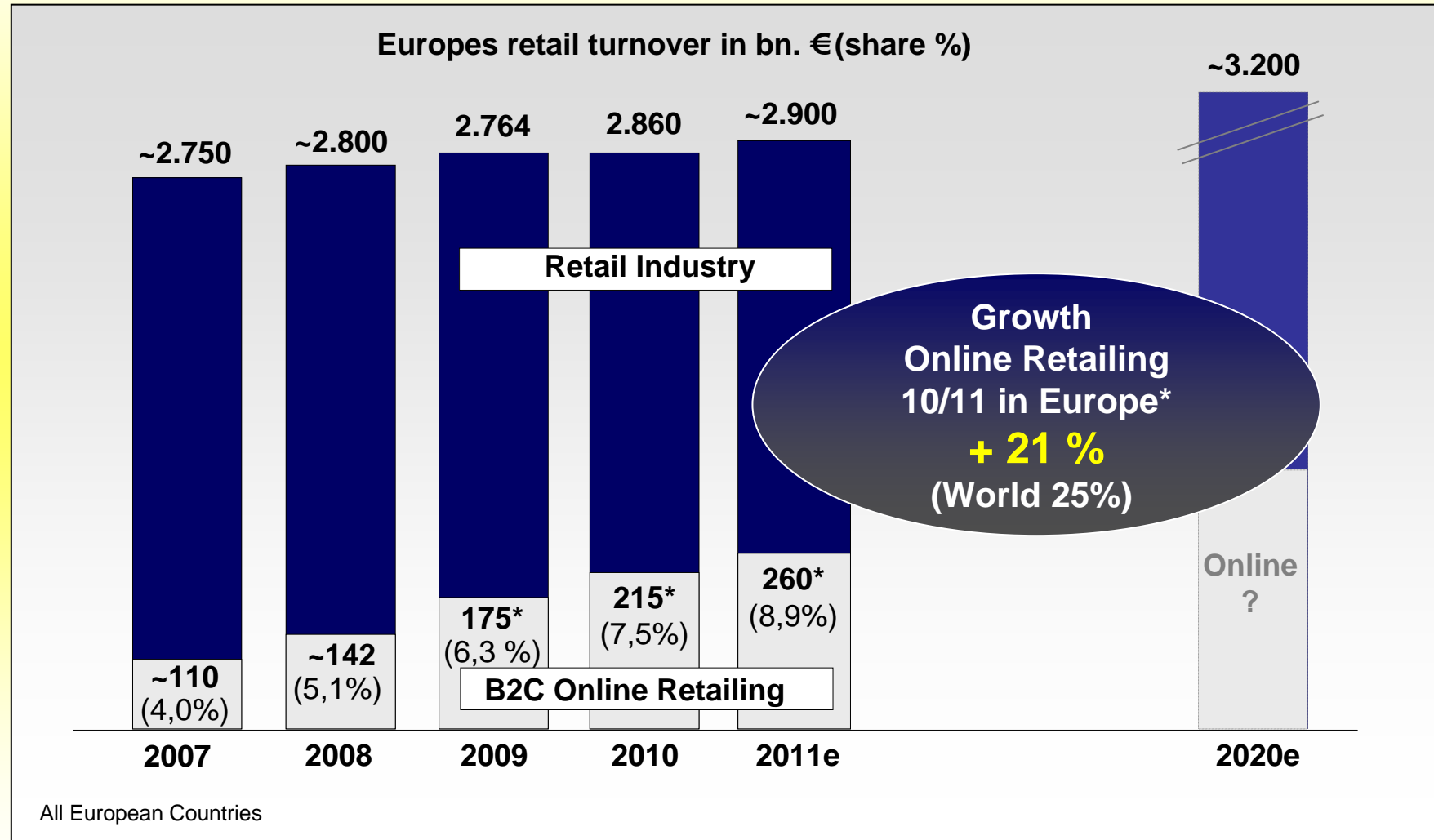


Quelle: Internet World Stats, updated June 30 2010

Quelle: Focus 4/2011, S. 85; Pressemitteilung Facebook 2010; FAZ 2010

Online Retailing Boom

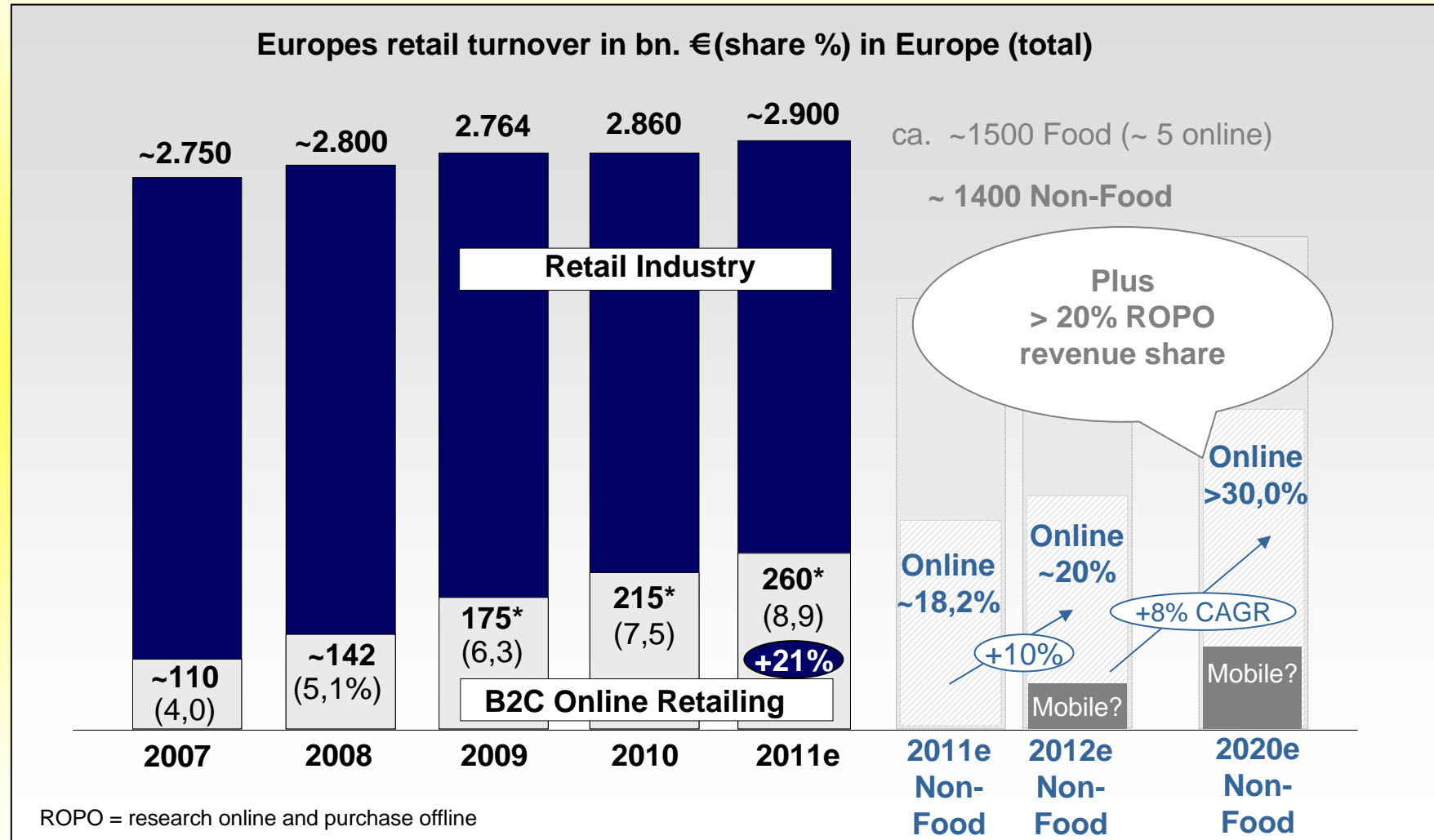
„Growth in the online business sector is not to be stopped in the next years“



Source: GfK GeoMarketing; *IMRWorld B2C global ecommerce overview 2011, www.imrg.org

Online Retailing Outlook

„Growth in the online business sector is not to be stopped in the next years“



Source: GfK GeoMarketing; *IMRWorld B2C global ecommerce overview 2011, www.imrg.org

European Online Growth

„Growth in the online business sector is not all the same in Europe“

Europe		2007	2008	2009	2010	2011e	09/10
	UK	52,605	55,005	56,121	68,501		22,1%
	Germany	19,400	23,900	26,900	30,000		11,5%
	France	15,600	20,000	25,000	31,000		12,0%
	Austria	1,350	1,900	2,700	3,500		29,6%
	Belgium	1,980	2,500	2,825	3,600		27,4%
	Czech Republic	464	882	1,059	1,307		23,4%
	Denmark	2,953	4,385	5,042	5,800		15,0%
	Finland	2,170	3,165	3,640	3,980		9,3%
	Hungary	179	238	356	490		37,6%
	Ireland	1,500	2,200	2,100	2,960		40,9%
	Italy	4,868	6,365	10,037	14,358		43,0%
	Netherlands	4,970	6,333	7,400	8,200		10,8%
	Norway	2,592	3,728	4,400	5,200		18,2%
	Poland	1,330	2,110	2,470	2,800		13,4%
	Portugal	400	560	650	780		20,0%
	Russia	2,371	3,020	3,400	4,400		29,4%
	Slovakia	40	66	96	300		-
	Spain	5,912	6,695	7,760	10,100		30,2%
	Sweden	4,000	6,840	7,866	8,880		12,9%
	Switzerland	1,737	3,698	4,250	4,500		5,9%
	Greece	250	450	800	1,400		75,0%
	Turkey	696	1,000	1,150	1,750		52,2%
	Romania	125	275	325	425		30,8%
	Ukraine	125	200	250	375		50,0%
		126,361	154,150	174,987	214,566	260,000	21,2%

Source: IMRWorld B2C global ecommerce overview 2011, www.imrg.org

Worldwide Online Growth

„Worldwide growth in the online business sector -
BRICI countries are taking the lead “

BRICI countries have fastest growth (Brazil, China, India, Russia, Indonesia)

	2009	2010	2011e	Growth 10/11
North America	€184bn	€214bn	€246bn	15%
Europe	€175bn	€215bn	€260bn	21%
Asia Pacific	€96bn	€124bn	€165bn	33% !!!
Latin America	€16bn	€23bn	€31bn	35%
Other Regions	€10bn	€16bn	€24bn	50%
World	€473bn	€592bn	€726bn	23%

Source: GfK GeoMarketing; *IMRWorld B2C global ecommerce overview 2011, www.imrg.org

Multi Channeling Has Highest Online Potential

„Multi channel retailing enables offline retailers to participate from the online boom“

Multi Channel Retailing

is considered as **Combination** of

(traditional) stational offline plus

electronical online channels as new format, whereas

Multi Channeling

describes their usage from customers side

What are the key trends in multi channeling?

Source: Heinemann 2008

Key Trends

in Multi Channeling

Key Trends in Multi Channeling

„Ten key trends will likely influence Multi Channeling during the next years.
Let's look at them in detail“

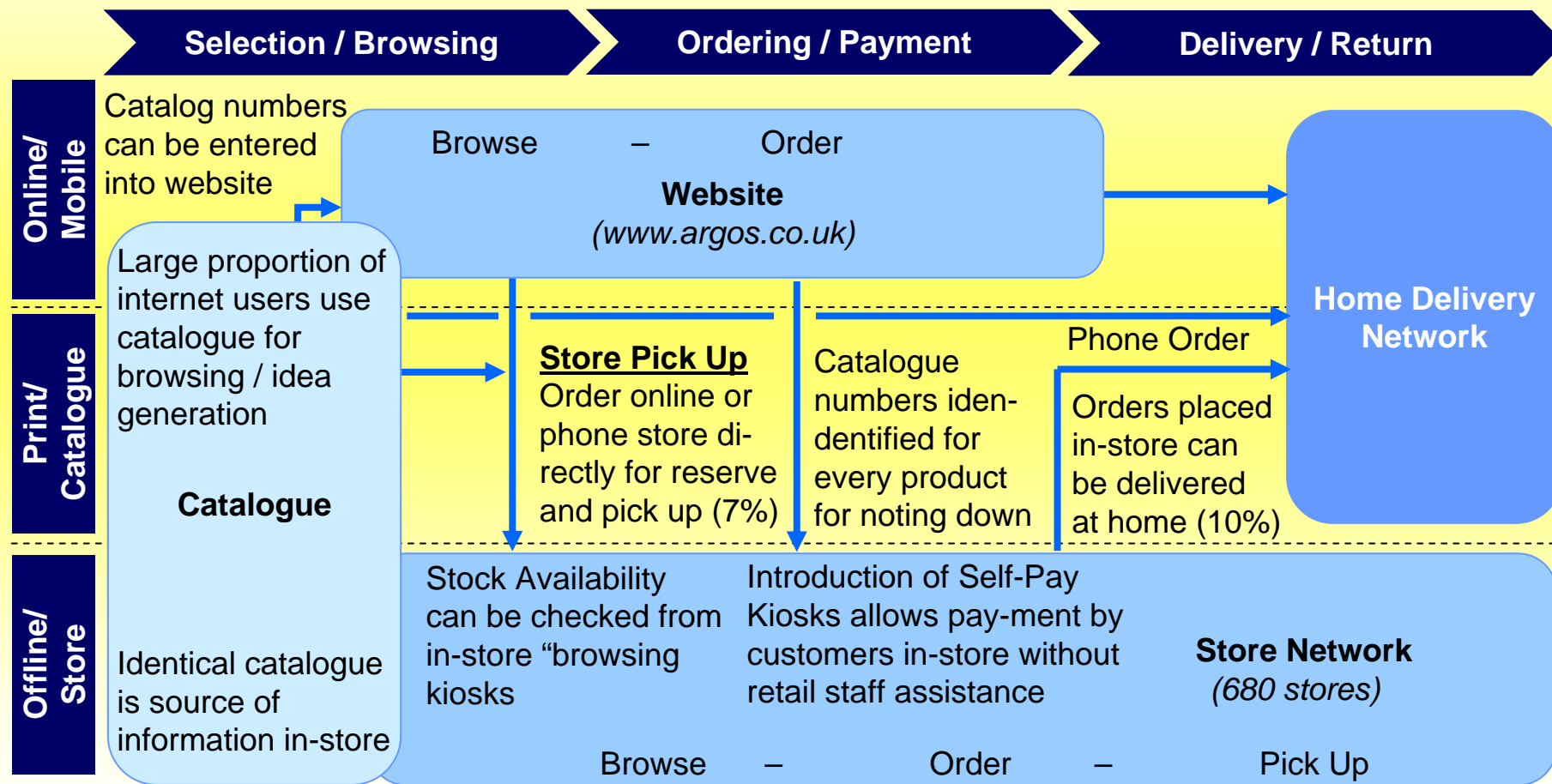
- ▶ **Social Media** – Socialization of e-commerce
- ▶ **Crowdsourcing** – Externalization of functions to customers
- ▶ **Mobile Commerce** – Penetration of cross technology platforms
- ▶ **Innovation&Gamification** – Pluralization of new e-business models
- ▶ **Traffic Platforms** – Accelerated adoption of open market places
- ▶ **E-Books&More** – Advanced digitalization of products
- ▶ **Cross Channeling** – Integration of channels to new no-line-worlds
- ▶ **Search Commerce** – Merging of search and commerce
- ▶ **Digital Splitting** – Emanzipation of digital natives
- ▶ **E-Christmas** – Key role of christmas season and gift buys

Key Trends and now?

From Multi Channel to Noline

„Multi Channel Retailing is changing to new forms of noline retailing“

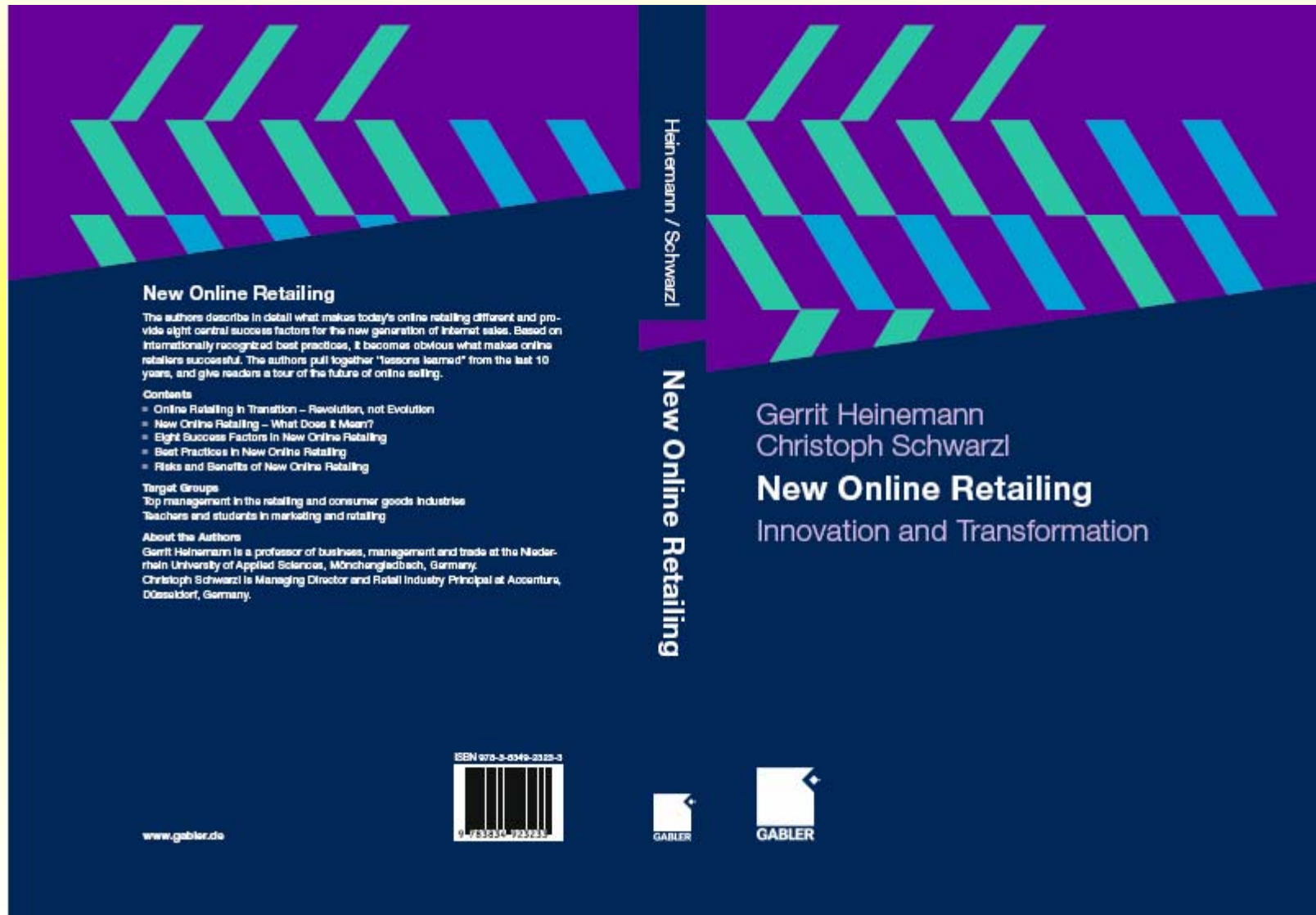
„Multi Channel Network Architectur from Argos“



Source: Heinemann 2008 in attendance an OC&C

New Online Retailing

„Common accepted Best Practices“



Thank you very much!