A GUIDE TO E-COMMERCE
EUROPE

Book 1: Understanding the European market dynamics

Know How →

NEW ZEALAND
TRADE & ENTERPRISE
Te Taurapa Tūhono

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A GUIDE TO E-COMMERCE EUROPE

Book 1: Understanding the European market dynamics

Welcome to this guide

With over 500 million consumers, the European market is worth exploring and this guide provides New Zealand companies with an overview of e-commerce in Europe.

The European market is vast, with more than 300 online marketplaces competing for a share in its NZ$1 trillion-plus online retail market.

In this guide we take you through the key trends and introduce you to the main players in Europe's thriving digital marketplace.

This is the first of four books, produced with support from Eywa Consulting, designed to help you on your journey with e-commerce in Europe.

The next three books focus on:

- Book 2: The European consumer
- Book 3: The e-commerce customer journey
- Book 4: Improving e-commerce performance.

Author: Marianne Kopf

What's inside

Europe's e-commerce landscape

Introducing Europe

The EU formed
60
years ago

→

Home to
28
countries

→

More than
500M
consumers

→

CLUSTERS
of e-commerce maturity

Different consumer
EXPECTATIONS & HABITS

→

1
currency since
2002

→

2018
New data and e-commerce regulations

→

Single Digital Market
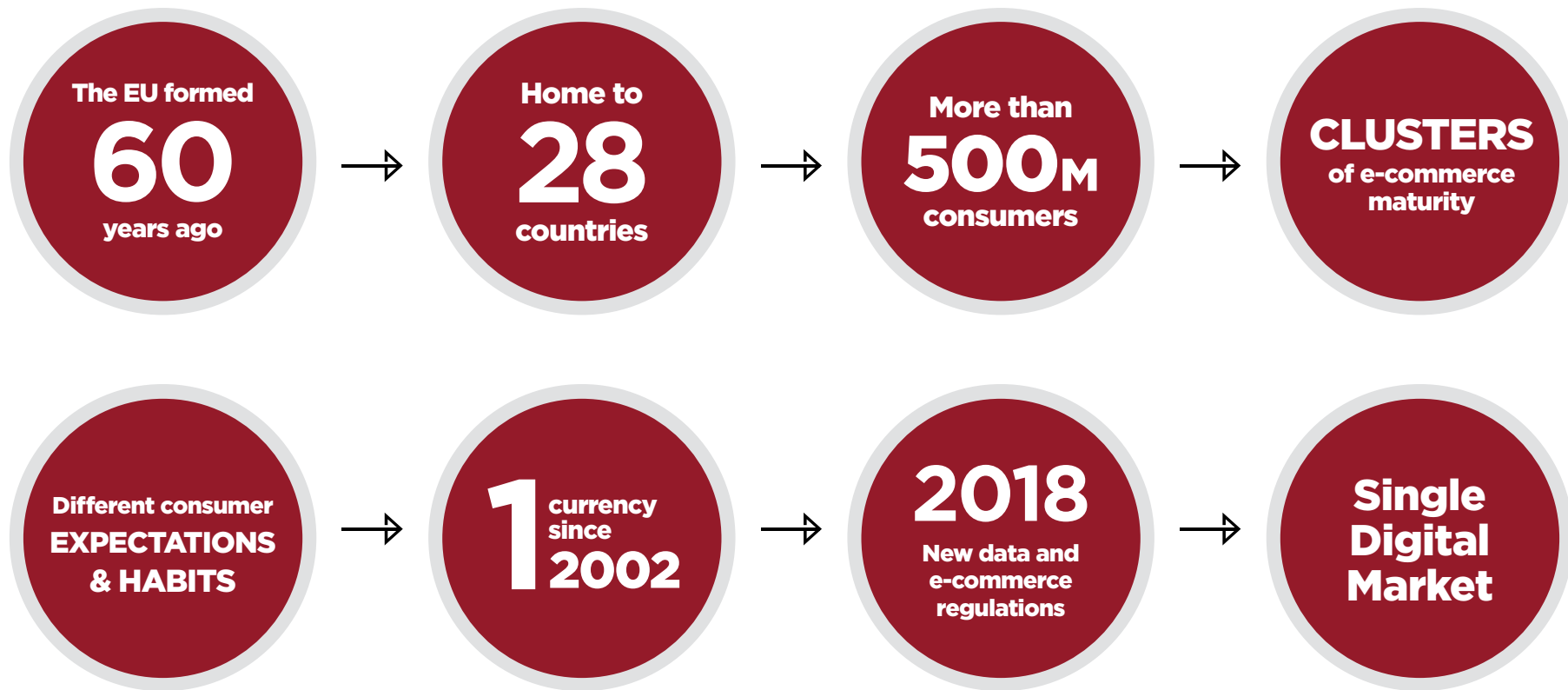
Europe's online buyers

Europe is made up of 28 different countries. Market clusters form according to shared languages, cultural similarities, historical immigration or technical standards. It's important to target markets where customers are active online buyers.

DACH
Germany, Austria & Switzerland

Nordic countries
Finland, Norway, Sweden & Denmark

Official languages: German, French, Italian.

64% of e-shoppers buy on foreign e-commerce sites.

Switzerland

Savvy online buyers

Amazon has **15M** users in Sweden

6
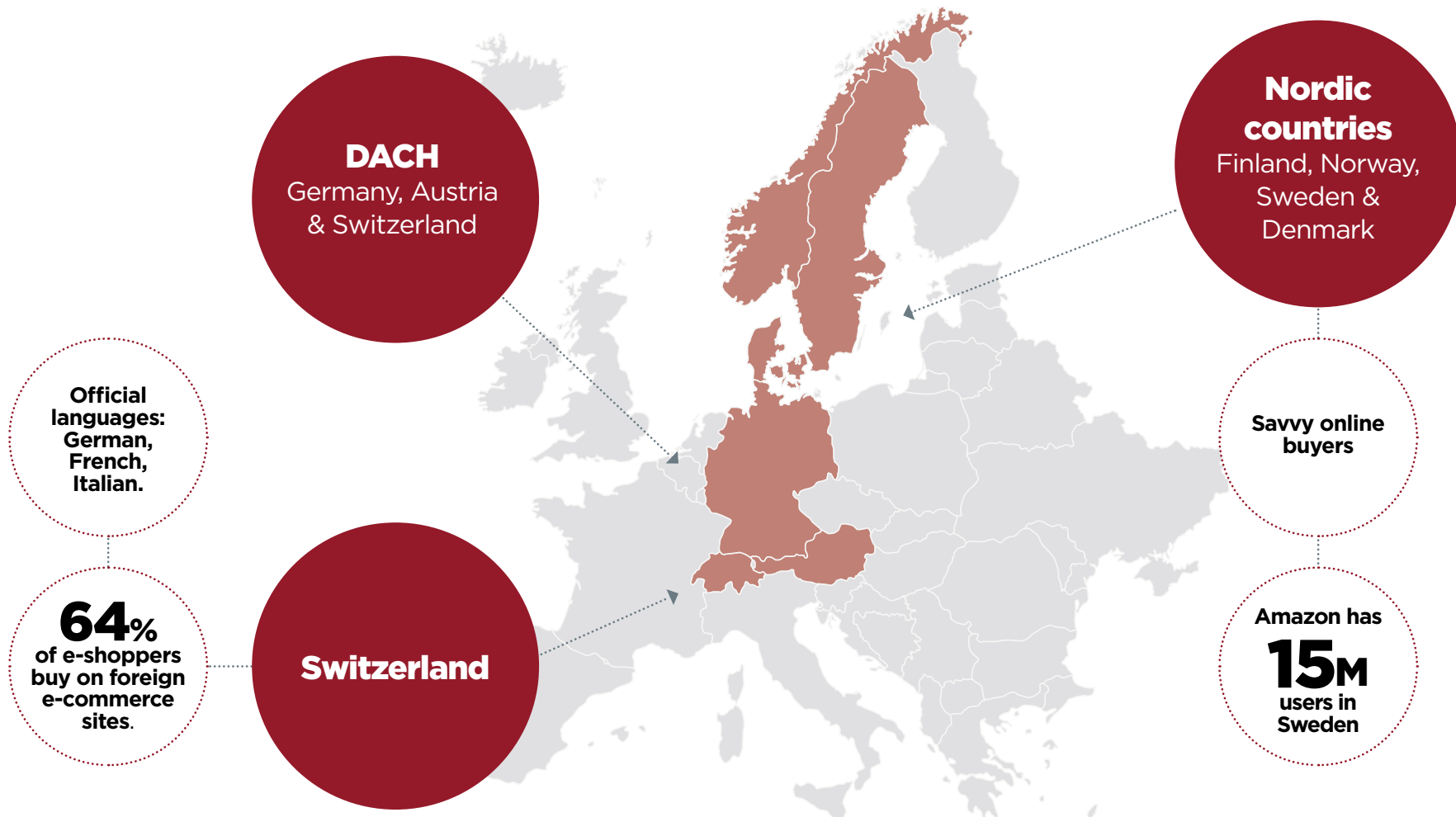
European Union (EU): a single digital market in 2019

A single digital market
The EU is working toward creating a single digital market to facilitate e-commerce while at the same time protecting European consumers.

Safer online transactions
The EU adopted new rules to make electronic payments in shops and online safer in November 2017.

Data protection regulation
The new EU General Data Protection Regulation came into force in May 2018, and is the most important change in data privacy regulation in two decades.

The end of geo-blocking
To support cross-border e-commerce, the EU is ending geo-blocking on websites by the end of 2018.

Compliance
Companies will have to comply with the rules and regulations of the Single Digital Market.

Key figures

Online Retail Industry

NZ$1 TRILLION

14%
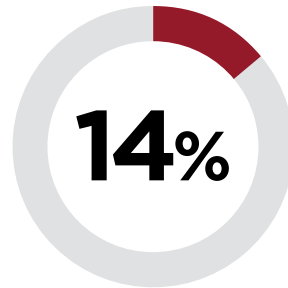
Average e-commerce growth

Turkey 31% Italy 26% Spain 25% France 21% Germany 18% UK 16%

75%
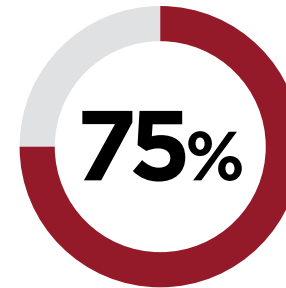
Of European e-commerce business are in UK, Germany and France

84%
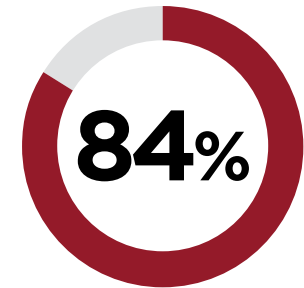
Internet penetration

UK 97% Germany 91% France 88% Spain 82%

58%
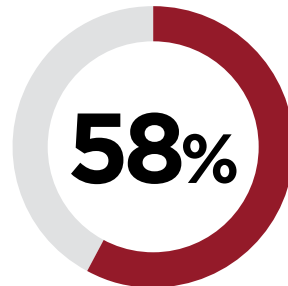
Of European consumers shop online (52% mobile)

8%
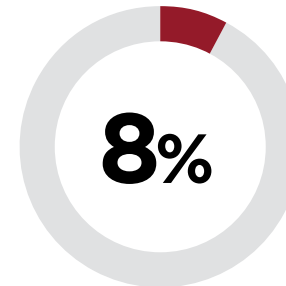
Average share of online shopping

UK 18% Germany 15% France 10%

86%
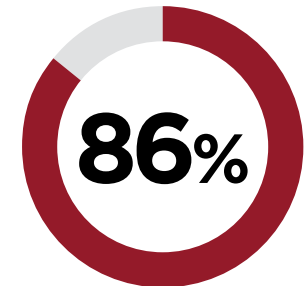
Of online purchases done by 1/3 of the shoppers (heavy buyers)

Know your competitors in a crowded arena

A thriving e-commerce market

Europe is a thriving market for e-commerce across all industries. The main players are active in these areas:

Large retailers

International brands

Houses of brand

Direct marketing companies

Concept stores

Disruptive online start-ups

The sharing economy

Local shops

Small businesses

B2B companies

Local and global marketplaces

Online disruption

Digital entrepreneurs

The market is being disrupted by pure online players and innovative start-ups that invent new business models. They are focused on their customer, and quickly adapt to change. Their DNA is digital and for them omni-channel means 'online, social, mobile'.

E-commerce made easy

For many entrepreneurs, e-commerce has become the first step in setting up shop – it's never been easier. Many small businesses, artisans and creatives are appearing on the web in a wide range of sectors, selling products and services spanning organic cosmetics to farmgate products and made-to-measure clothing.

Niche market success

Niche markets are benefiting from being online because the cost of entry is low and the potential reach is high. Some brands are succeeding with temporary online pop-up shops.

Large retailers are embracing e-commerce

Customer expectation

Europe's large retailers understand they need to offer online shopping in order to survive.

Customers choice

Large retailers are embracing online shopping alongside their in-store experience. They offer consumers the choice of choosing groceries online with delivery, or buying online and picking up in store.
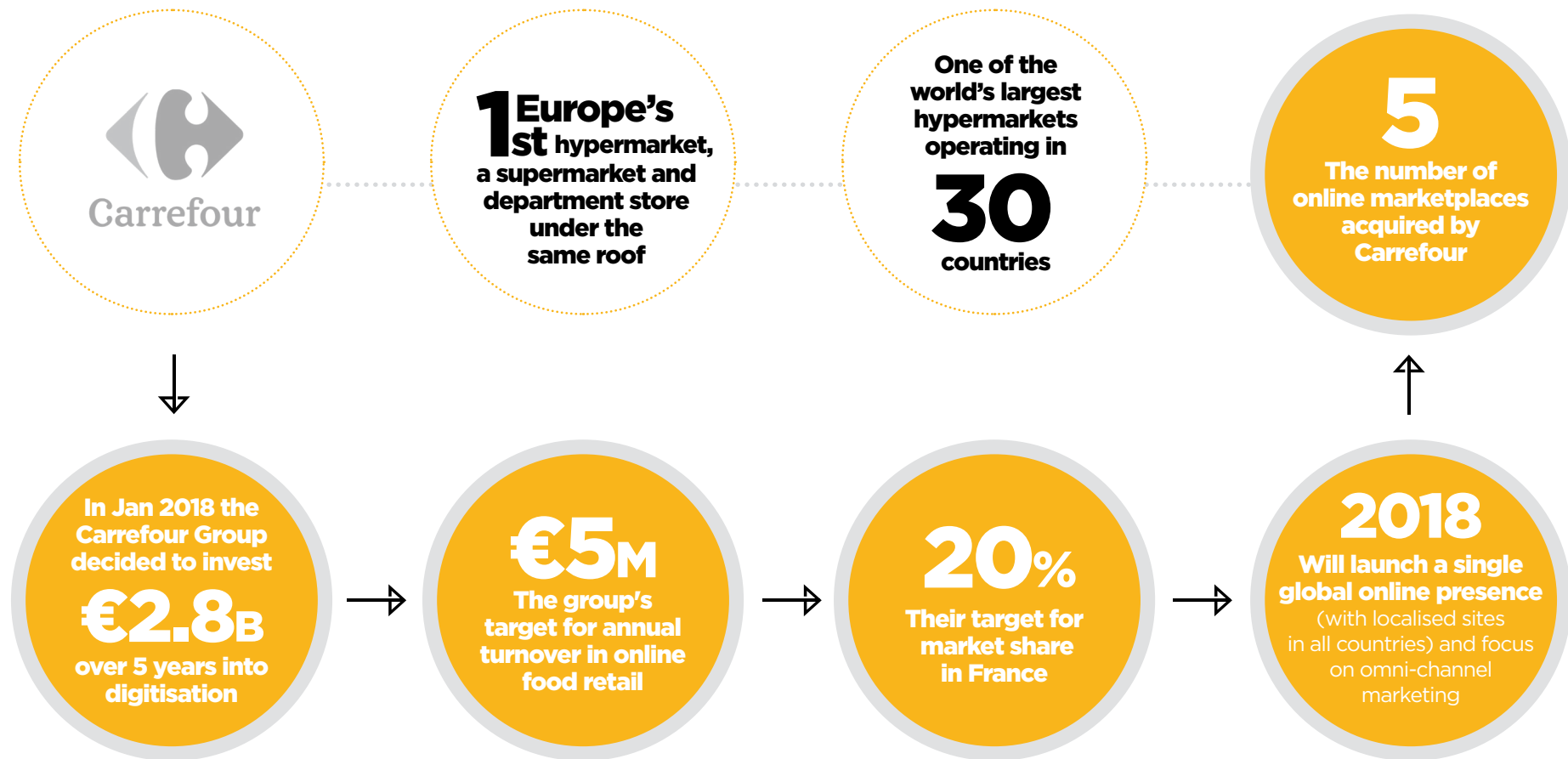
Channel diversity

Large retailers' online strategies are diverse. Some have created a dedicated e-shop in addition to their websites, while others have developed mobile apps.

Carrefour's online strategy

Carrefour, once the largest bricks and mortar retailer, is now rapidly and recently trying to upscale their digital capability in an attempt to compete with online retailers.

Carrefour

1st Europe's **hypermarket**, a supermarket and department store under the same roof

One of the world's largest hypermarkets operating in **30** countries

5 The number of online marketplaces acquired by Carrefour

In Jan 2018 the Carrefour Group decided to invest **€2.8B** over 5 years into digitisation

€5M The group's target for annual turnover in online food retail

20% Their target for market share in France

2018 Will launch a single global online presence (with localised sites in all countries) and focus on omni-channel marketing

B2C brands lead the way in e-commerce
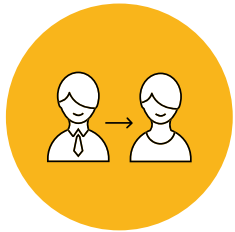
Multiple e-commerce channels
Businesses selling to consumers (B2C) brands are active in e-commerce, through websites, dedicated e-shops and, for some of them, online marketplaces.

Social sales
Some use social media not only to build a community of fans, but also for direct sales (s-commerce).

Seamless experience
They understand that customers expect a seamless shopping experience, from in-store to an online shop.

Distribution integration
E-commerce also gives these brands an opportunity to better integrate their various distribution channels.

The evolution of direct marketing companies

Otto used to be a physical mail order catalogue and is now an online store, as is La Redoute.

2016
Germany's Otto switches to digital

Direct marketing is changing as printed catalogues disappear or become digital.

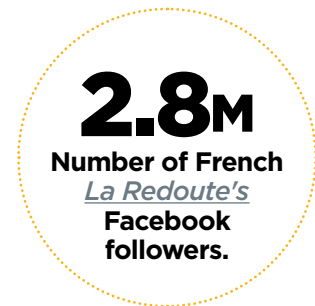Their client database easily transforms into a large online community.

The main European player, Germany-based *Otto*, switched to digital in 2016.

Otto offers its own products and those of other brands and retailers, acting like a one stop shop and a marketplace.

2.8M
Number of French *La Redoute's* **Facebook followers.**

La Redoute

Rise of the sharing economy and social enterprise

The rise of the sharing economy and social enterprise

Focus on responsibility

There is an increase in collaborative and responsible businesses in e-commerce.

These businesses want to build a more sustainable future and play an active part in the way products are made, sold, consumed. Local production and fair trade practices are essential.
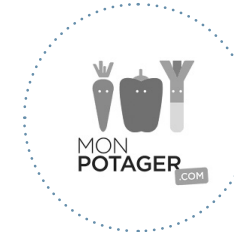
New models

La Ruche qui dit Oui (The Food Assembly) is an online sales platform for fresh and local products, launched in 2010.

In France, it employs more than 100 people, supported by a network of 1000 voluntary bee keepers and 5000 farmers.

It is now expanding across Europe.

100 Employees in France

500 Farmers

1000 Voluntary bee keepers

A collaboration

In 2014, a young French farmer offered people living in cities the opportunity of owning a veggie patch they could manage online, for less than €15 per month.

In just a few years the concept developed into *Mon Potager* – a local fresh food marketplace and a socially engaged community of 25,000 registered members around Paris, Lyon and Bordeaux.

The innovative start-up is now serving restaurants, expanding in other regions and offering various delivery options as well as a free currency system for its members.

Online marketplaces

Marketplace platforms

Online trading platform

A marketplace is an online trading platform for sellers and buyers. These marketplaces secure transactions, intervene in disputes and bring benefits including scale.
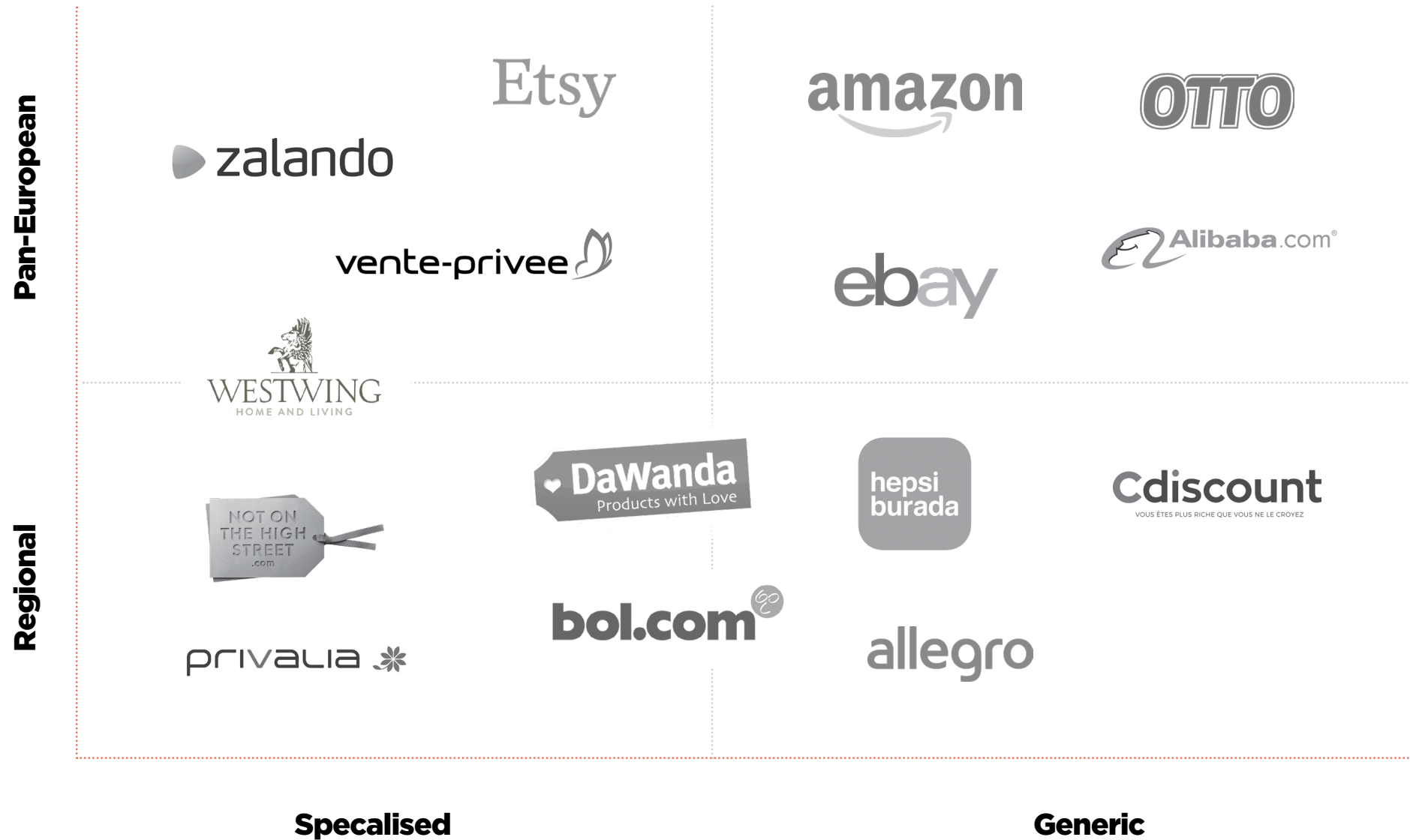
The marketplace model

A marketplace usually offers a large range of products, sometimes in limited supply, sold by different vendors. It is a digital reinvention of a shopping mall.

The full shopping suite

For the online shopper, advantages of marketplaces include a wide range of choice, payment security, data protection and attractive delivery and return options.

Major European online marketplaces

Pan-European

Regional

Specalised

Generic

Etsy

amazon

OTTO

zalando

vente-privee

ebay

Alibaba.com

WESTWING
HOME AND LIVING

DaWanda
Products with Love

hepsi burada

Cdiscount
VOUS ÊTES PLUS RICHE QUE VOUS NE LE CROYEZ

NOT ON THE HIGH STREET .com

bol.com

privalia

allegro

Amazon in Europe

Amazon has invested **€15B** in Europe since 2010...

...and has a European network of fulfilment **31** centres in seven countires

Amazon has **50K** permanent employees

In 2015, shipped over **1B** units to customers across Europe

Created **15K** full time jobs across Europe in 2017

In 2016, they saw a **16%** increase in units shipped to customers across Europe

amazon

Customer networks
Retailers who sell via *Amazon* can tap into the marketplace's vast network of customers, including those who receive free shipping.

Fulfilment management
Amazon, through *Fulfilment by Amazon*, takes responsibility for goods storage and delivery, and customer support.

Data management
Amazon also offers data storage and handling solutions.

Expanding reach
Amazon is continuing to expand its data centres in Europe, located in more than 20 countries to date.

Members only marketplaces

Members only

The German start-up *Westwing* is a members only online shop focusing on interior design. It belongs to the Rocket Internet Group, employing 28,000 people.

Exclusivity

Westwing's business model is based on product scarcity and the desire to get top brands at the best price.

Time limited

Every day a new selection of products appears for sale for a limited time, on Westwing's website and mobile app.

Other big players

Zalando Privé and *Ventes Privée* use the same business model and roll it out in multiple countries.

WESTWING
HOME AND LIVING

28k

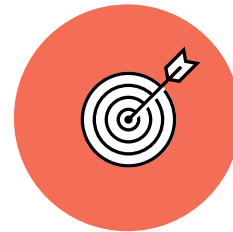No. of employees at German members only online shop Westwing

Marketplace opportunities

Selling your products on an online marketplace can help you quickly reach a wide range of potential customers, and learn about their preferences and consumer behaviour to build product visibility and a broad customer base.

Key advantages:

Fast search power

**Powerful
marketing strategies**

**E-fulfilment
logistics options**

**Innovations
in customer service**

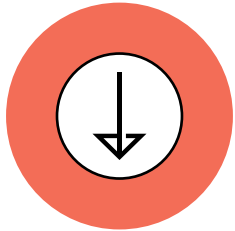i.e. parcel tracking, free returns,
customer reviews, mobile purchasing.

**Associating with
the strong reputation
of a marketplace**

**Ability to rapidly
test how customers
respond to a product**

Marketplace downsides

Removed from customers
Marketplaces retain the customer database and manage loyalty. Sellers get little information on the marketplace-client relationship.

Fixed terms and conditions
They dictate their terms and conditions for delivery and after-sales services. A seller who does not comply with the marketplace's requirements will simply see his account blocked or closed, often without notice.

Global and local terms
Sellers have to play by their rules in relation to the transaction costs applied to each sale and the infrastructure requirements. For example, Amazon insists that sellers have a local address within the market they are selling.

Product restrictions
Marketplaces may also define which products are worth selling. Amazon is tagging products with the acronym CRaP for products that Cannot Reach a Profit.

Cost of service
Although the entry fee can be attractive, the extra services add costs and reduce margin. Cash flow may also be an issue as the marketplace does not credit your account immediately.
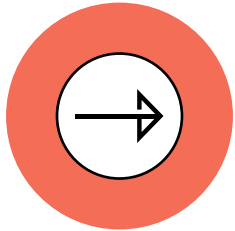
Advertising
Marketplaces will also strongly encourage sellers to buy advertising on their platform.

Brand alignment
For high end fashion or luxury brands, the marketplace must be chosen carefully, as its reputation or positioning will be associated with their own brand image over time.

Key recommendations

1 Market entry

You may benefit from the convenience, scope, and customer base of a marketplace when entering a new market or launching a new product online.

2 Fast track sales

If your pricing structure is clear and you can control it, your presence in a marketplace can provide a fast increase in sales.

3 Brand awareness

If you want to build brand awareness, it is better to run your online activity independently and enjoy customer loyalty in the long-term.

4 Mix the model

Some brands have developed a flexible strategy: they limit the marketplace sales to certain products or services and use it more as a test market.

5 Target niches

Another option is to choose one or two marketplaces, including members only shopping clubs, to leverage their marketing power, brand positioning and reach to a qualified customer base.

6 Develop a strategy

In summary, think carefully and strategically before offering your products on a marketplace. The decision needs to be examined and planned from the very beginning of your journey to e-commerce in Europe.

SECTION 5

Logistics and the last mile delivery

E-commerce impact on logistics sector

Disrupting the sector

The rise of e-commerce and cross-border trading is transforming the transport and logistics sectors.

Infrastructure investment

Storage space is in high demand and large logistic platforms are being built near traffic lines and big cities.

Provider consolidation

Major consolidations between transportation companies have occurred in Europe, as they refocus on e-fulfilment and omni-channel approaches.

Expanding for e-commerce

The main express delivery companies such as DHL and Fedex have joined the race to e-commerce. Some have specialised in pick and pack supply chain and shipping services.

Multi-partner solutions

E-commerce retailers in Europe need a number of different logistics partners, both global and local service providers, to optimise costs, shorten lead times and ultimately deliver the best customer experience.

The top European logistics hubs

Knowing which logistic hub to use is crucial to succeeding in Europe's e-commerce market.

Top 10 most desirable hubs

- Venlo
- Rotterdam
- Antwerp-Brussels
- Rhein-Ruhr
- Pan-Regional Romania
- Île-de-France
- Madrid
- Liège
- Frankfurt am Main
- Central Germany

Top 3 locations for logistics and storage hubs within Europe are in the Netherlands and Belgium.

Top 10 most desirable locations for logistics hubs are in Continental Western Europe.

These hubs provide immediate access to major population and consumption centres, and lower operational costs.

Excluding Madrid and Pan-Regional Romania

Venlo

Rotterdam

Antwerp-Brussels

E-fulfilment

The logistics of e-commerce can be provided by e-fulfilment businesses, from warehousing and delivery to order management and credit checking.
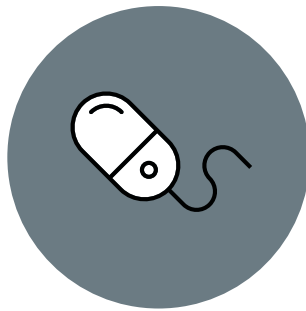
**Click & collect
Pick up locker**   →   **Parcel tracking
Delivery timing**   →   **Free delivery
Free return**

The last-mile delivery challenge

Timeliness
What happens during the time a customer waits for an online order is crucial to their brand experience. Online shoppers tend to be anxious about the final delivery.

Changing post model
In most European countries, the local postal services have changed their organisation to cope with increased parcel traffic generated by e-commerce.

Local innovation
Small start-ups have also emerged locally, such as those delivering fresh food into city centres by scooter or bike.

Full service
Most e-fulfilment operators offer parcel tracking systems, packaging and wrapping services, consistent delivery time and local follow-up contacts.

Amazon's latest innovations in e-fulfilment
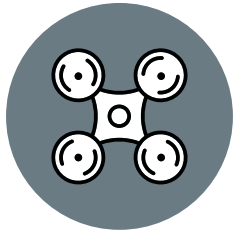
Speedy drone deliveries

Amazon introduced *Amazon Prime Air* in 2016 in the UK, Austria and France: a delivery within 30 minutes by unmanned drones.

Amazon Key innovation

Since 2017, in the US, Amazon's Prime Members can buy *Amazon Key*, a kit that includes a security camera, the Cloud Cam, and a compatible smart lock.

Instant pick-up

Amazon has installed a new instant pick-up service allowing customers to order supplies and to pick them up from a nearby pick-up locker often located close to shopping malls.

E-fulfilment recommendations
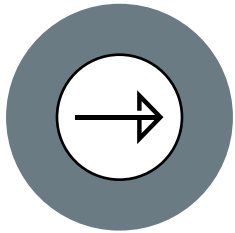
① Manage expectations

Any last mile delivery innovation is a competitive advantage for your brand. Listen to your customer's expectations to make their purchasing process as convenient as possible.

② Outsource to save

Reliable outsourced e-fulfilment services will help you save time and money – you avoid renting storage space, hiring people to fulfil orders, or managing inventories and logistics for single product returns.

③ Focus on partner selection

Before selecting your e-fulfilment partner, it is important to check the shipping guarantees and various delivery speeds they offer, as well as their shipping confirmation and communications processes. Make sure they also offer reverse logistics to handle individual product returns.
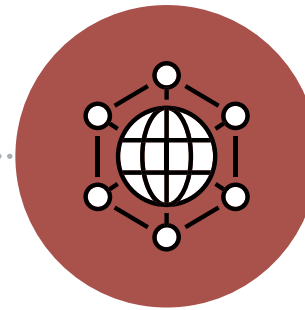
Customer tech experience

Technologies supporting e-commerce

Mobile payments
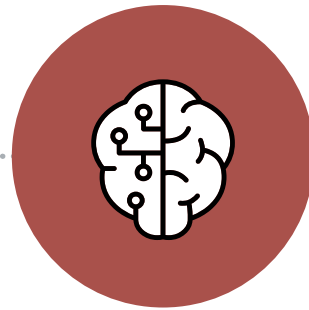
Artificial Intelligence

Internet of Things

Virtual Reality

Be mobile first

Fast growing channel

E-shop mobile visits make up more than 40% of the total traffic, and 86% of this mobile time is spent in apps like social media and messaging.

Benefits of mobile

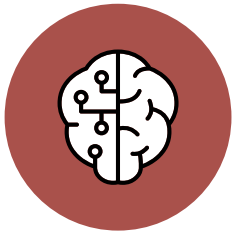Mobile payments increase sales and the speed of payment, and reduce the rate of fraud.

Improved payments

Apple Pay, Samsung Pay, and Android Pay are improving the mobile purchasing process.

Mobile transactions are on the rise

In the UK, more than 52% of all transactions are now done with mobile devices. France and Germany follow the same trend.

AI and e-commerce

Changing the shopping experience
Data, artificial intelligence, and machine learning methods are being used to efficiently connect shoppers to products.

Customer insights
Artificial Intelligence and big data provide a more precise understanding of the customer and enable the shopping experience to be personalised in ways that were never possible before.

Data driven predictions
Datasets can predict likely outcomes. Rich signals – such as sensor or machine data, social, and network data – are being blended with behavioural data to further improve accuracy.

Internet of Things (IOT)
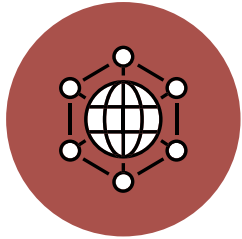
Game changing
Internet of Things refers to the physical devices working and processing information via the internet. IoT will transform e-commerce.

Driving innovation
It will offer new solutions for smart inventory and logistics management, enhanced website user experience, and product warranty management.

Automating shopping
Predictive systems will know when customers leave to go shopping, and the products will be pre-packed, ready to be picked up, based on a list sent to vending machines.

Personalisation
IoT also assists personalised advertising. It can recognise shopping patterns and search trends, allowing products and services to be tailored to customers.
IoT also improves customer service and reports issues before they are noticed.

VR, the next level shopping experience

Maximising customer experience
Experience is important for European online shoppers.

Meet new expectations
The younger generations grew up with mobile phones and video games. They expect retailers to enrich their customer journey with new ways to share their shopping experience.

Product immersion
Virtual reality creates immersive environments that make users feel like they have truly entered simulated environments.

Selling to businesses – a snapshot

Selling to businesses – a snapshot

Restricted access

B2B companies give limited access to their online platforms, making it difficult to get an overview on best practices.

Integrated e-procurement

Often understood as e-procurement, it used to be fully integrated with the business information systems and linked to private or sector specific marketplaces.

Digital management

Companies also use digital platforms to publish and handle their Requests for Proposals (RFP) from a broader scope of suppliers.

B2B e-commerce facts & trends

Led by search
Product preferences and buying decisions are determined via the web: 90% of B2B buyers use online search to find a product.

B2B buyers expect more
B2B buyers expect a broader selection, faster delivery, and more product information, through multiple devices (mobile, desktop, mobile apps) than B2C.

Opening the direct channel
Like in B2C, traditional B2B sales channels have evolved with new buyer's behaviour, taking out the middle men.

Removing the distributor channel
More and more manufacturers are selling online directly to the end customer, thereby bypassing distributors.

Rise of the grey market
Grey markets develop easily online, with the risk of counterfeit products.

Lack of e-commerce capacity
Many B2B brands (except those selling IT or e-learning services for instance) still do not have the digital commerce skills for direct selling and e-fulfilment.

B2B operations need improvement
Digital service providers see a great business potential in B2B as they deliver tools and online platforms. But B2B challenges are also in organisational change, customer journey and service improvement.

B2B marketplaces

B2B marketplace growth
Online marketplaces for professional buyers are driving the growth of B2B e-commerce globally. They offer a large range of products, enabling easy comparison.

From bricks and mortar to digital
Specialised and private marketplaces for B2B clients have existed for decades. Electronic, computer or mechanical components are a good example (Verical, Arrow, TheRobotMarketplace).
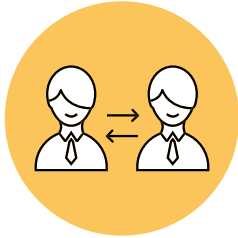
Opportunities in e-fulfilment
Some segments of B2B will benefit from the power of Amazon Business and its e-fulfilment solutions (launched in Europe in 2017-2018).

amazonbusiness

2017-18
Amazon Business launched in Europe

B2B by Amazon

Growing marketplace

Europeans are discovering Amazon Business, which was launched in the US in 2015, and has been adopted by one million businesses.

European expansion

Amazon Business has been in Germany and the UK since 2017, and started in France in February 2018.

Easy to start

The registration process is quick and easy.

Expanded customer reach

Gives access to Amazon's full client and products base (B2C) + businesses (B2B).

Personalised services

Offers additional services to professional buyers, to name a few - multiple user accounts and validation process, payment on invoice in 30 days, tailored pricing solutions and business analytics.

amazonbusiness

1M
No. of businesses using Amazon Business since 2015 US launch

43

SECTION 8

Summary

Questions to chart your progress

1

Do you have up-to-date and relevant market information on the European countries you want to target?

2

How may EU regulations and socio-economic dynamics affect your business development in Europe?

3

Who are the main players/competitors in your specific e-commerce arena?

4

Do you know on which marketplaces/platforms your customers are buying?

5

How do you best balance the risks and opportunities of selling on a marketplace?

6

How can you best handle the logistics side of e-commerce in Europe?

7

Which are the best solutions to deliver your products to the customer?

8

What is the next e-commerce innovation you should not miss?

Sources and references

··· .

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Consumer Barometer with Google - *www.consumerbarometer.com*

Myer, e-bay virtual reality e-store - *www.youtube.com/watch?v=yAuiXhJPnr8*

New Zealand Trade and Enterprise (NZTE) is the Government agency charged with a single purpose: growing companies internationally, bigger, better and faster, for the benefit of New Zealand.

We employ 600 people, have over 200 private sector partners and draw on a global network of thousands more. We have people based in 50 offices, working across 24 time zones and 40 languages to support New Zealand businesses in over 100 countries. Our global presence lets us deliver value to the businesses we support, through our unique know-how (knowledge and experience) and know-who (networks and connections).

Our know-how and know-who is expressed in our Māori name: Te Taurapa Tūhono. Te Taurapa is the stern post of a traditional Māori waka, which records valuable knowledge, and stabilises and guides the craft forward. Tūhono represents connections to people and an ability to build relationships.

We provide customised services and support to ambitious businesses looking to go global. We help them build their capability, boost their global reach, connect to other businesses and invest in their growth. We also connect international investors with opportunities in New Zealand through a global network of investment advisors.

We call on our Government network and work closely with our NZ Inc partners and the business community, to grow our national brand and help businesses to open doors in global markets.

nzte.govt.nz

NEW ZEALAND
TRADE & ENTERPRISE
Te Taurapa Tūhono

A GUIDE TO E-COMMERCE EUROPE

Book 2:
Meet the European consumer

Know
How →

NEW ZEALAND
TRADE & ENTERPRISE
Te Taurapa Tūhono

June 2018

A GUIDE TO E-COMMERCE EUROPE

Book 2: Meet the European consumer

Welcome to this guide

European consumers are tech-savvy and highly connected online shoppers, and this guide provides New Zealand companies with an overview of e-commerce consumers in Europe.

Research shows European consumers are likely to make purchasing decisions based on sustainability issues and other key trends related to their culture and values.

In this guide we explain the demographics, buying behaviours and expectations of digitally-driven European consumers, outlining different social groups and their influencers.

By understanding the trends and different e-commerce consumers, you will be well equipped to develop the best online customer experience.

This is the second of four books commissioned by NZTE to help you on your journey with e-commerce in Europe. The other three books focus on:

- Book 1: The European market dynamics
- Book 3: The e-commerce customer journey
- Book 4: Improving e-commerce performance

Author: Marianne Kopf

What's inside

Meet the European consumer

A snapshot of the European consumer

With over 500 million consumers, the European market is thriving and the online retail market is worth over NZ$1 trillion. Europe has many different cultures and economies with their own unique history.
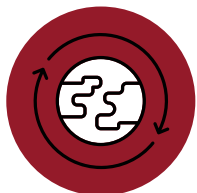
A snapshot of the European consumer:

Aging population
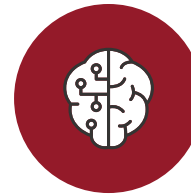In Germany and Italy, 52% of the population are over 50 years old.

Lost in translation
English is not their native language (except UK/Ireland). Europeans want websites in their own languages.

Global shoppers
Experienced e-shoppers who are used to shopping on foreign websites.

Early adopters
Tech savvy consumers who are easily influenced.

New breed of influencer
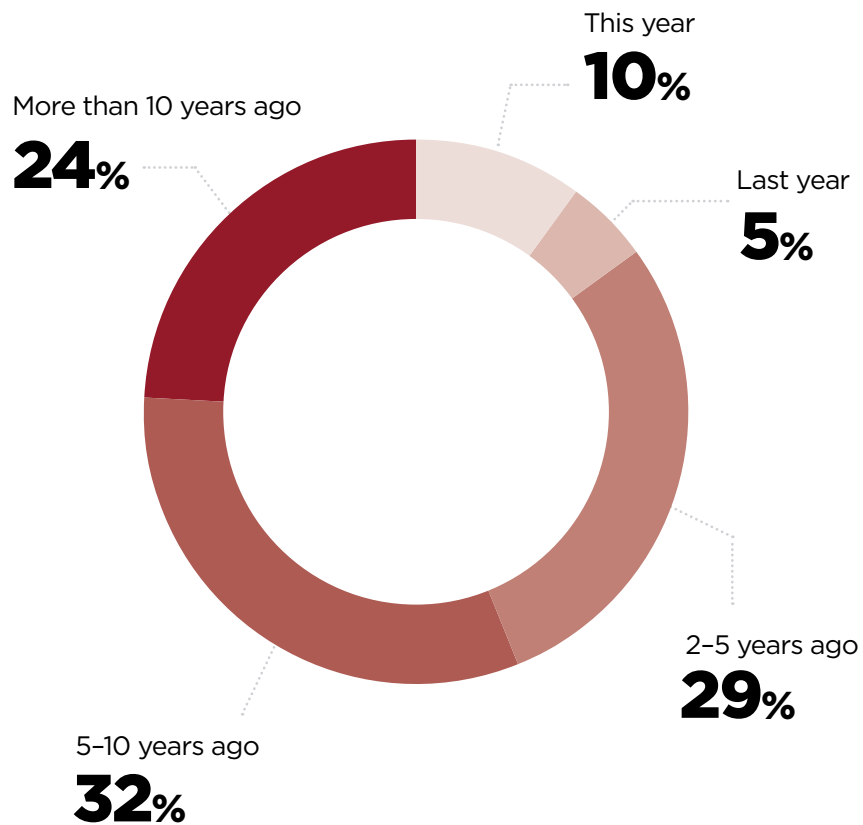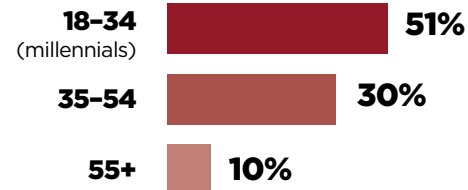Influential sub-cultures: youth, women and netizens can become brand advocates.

Eco Awareness
Sensitive to sustainability issues.

Europeans are experienced e-shoppers

Question: When did you start shopping online?

This year
10%

Last year
5%

More than 10 years ago
24%

2–5 years ago
29%

5–10 years ago
32%

Who are the frequent online buyers?

18–34 (millennials)	**51%**
35–54	**30%**
55+	**10%**

Share of annual online purchases by frequent online buyers

86%
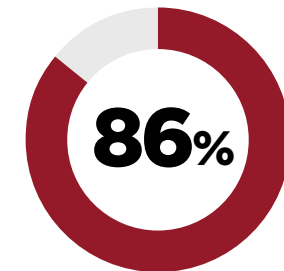
Top 3 products bought in 2017

Fashion	**61%**
Shoes	**54%**
Books	**51%**

Source: E-shopper barometer 2017

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Key traits of European e-shoppers

Key traits of European e-shoppers

They are increasingly comfortable with the digital medium, even the older generations: most have been using the internet for many years.

They are busy, trying to fit it all in 24 hours: their private, professional and social lives are intertwined, they seek efficient solutions.

They want it all and they want it now, through any device and in stores.

They get their information from multiple sources simultaneously, they scan for relevance before investing time in looking into the detail.

They want the best deal, with the most flexible delivery and payment terms.

They are in control: the web is an active medium. They expect brand marketing to be user centric, elective and permission-based.
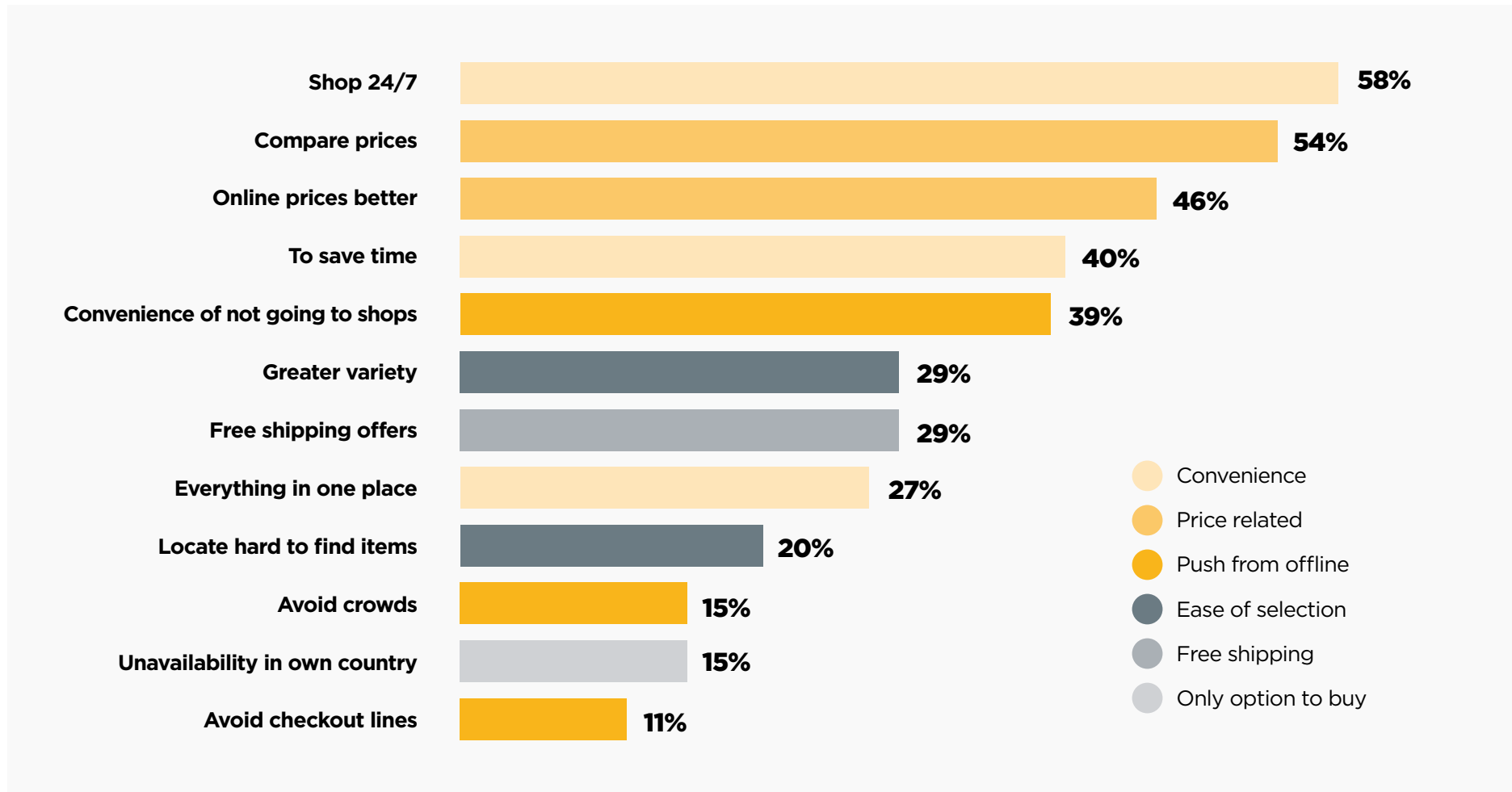
They frequently compare products and brands, loyalty is scarce unless the consumer believes in the brand and becomes an advocate.

They are informed: always connected, tuned into their world, on the pulse and fond of innovation with relevance.

They are vocal and social: they talk to each other, recommend products and brands and share experiences online with their various communities.
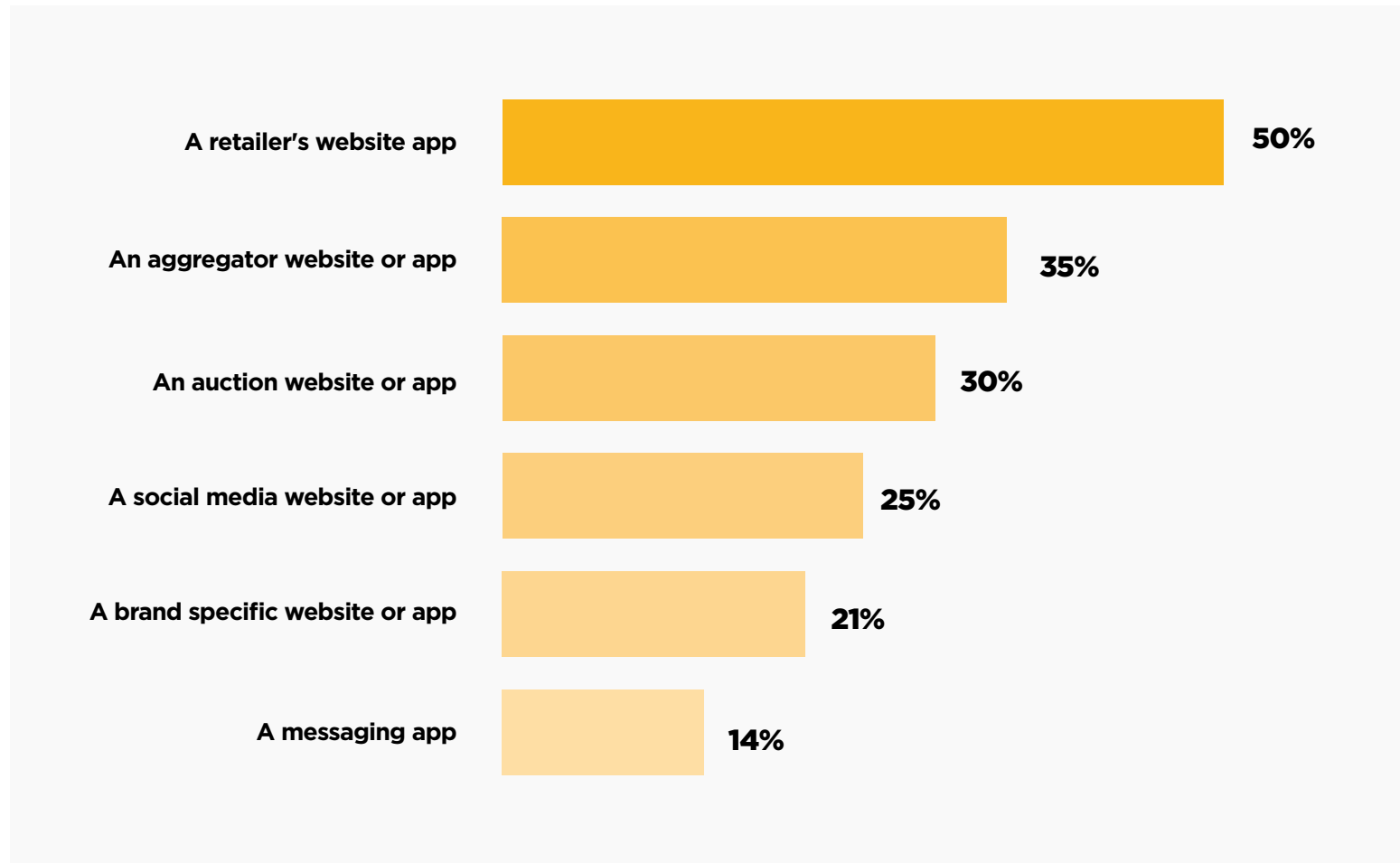
Online/in-store preferences

Share of annual online purchases by frequent online buyers.

Category	Value
Shop 24/7	58%
Compare prices	54%
Online prices better	46%
To save time	40%
Convenience of not going to shops	39%
Greater variety	29%
Free shipping offers	29%
Everything in one place	27%
Locate hard to find items	20%
Avoid crowds	15%
Unavailability in own country	15%
Avoid checkout lines	11%

Legend:
- Convenience
- Price related
- Push from offline
- Ease of selection
- Free shipping
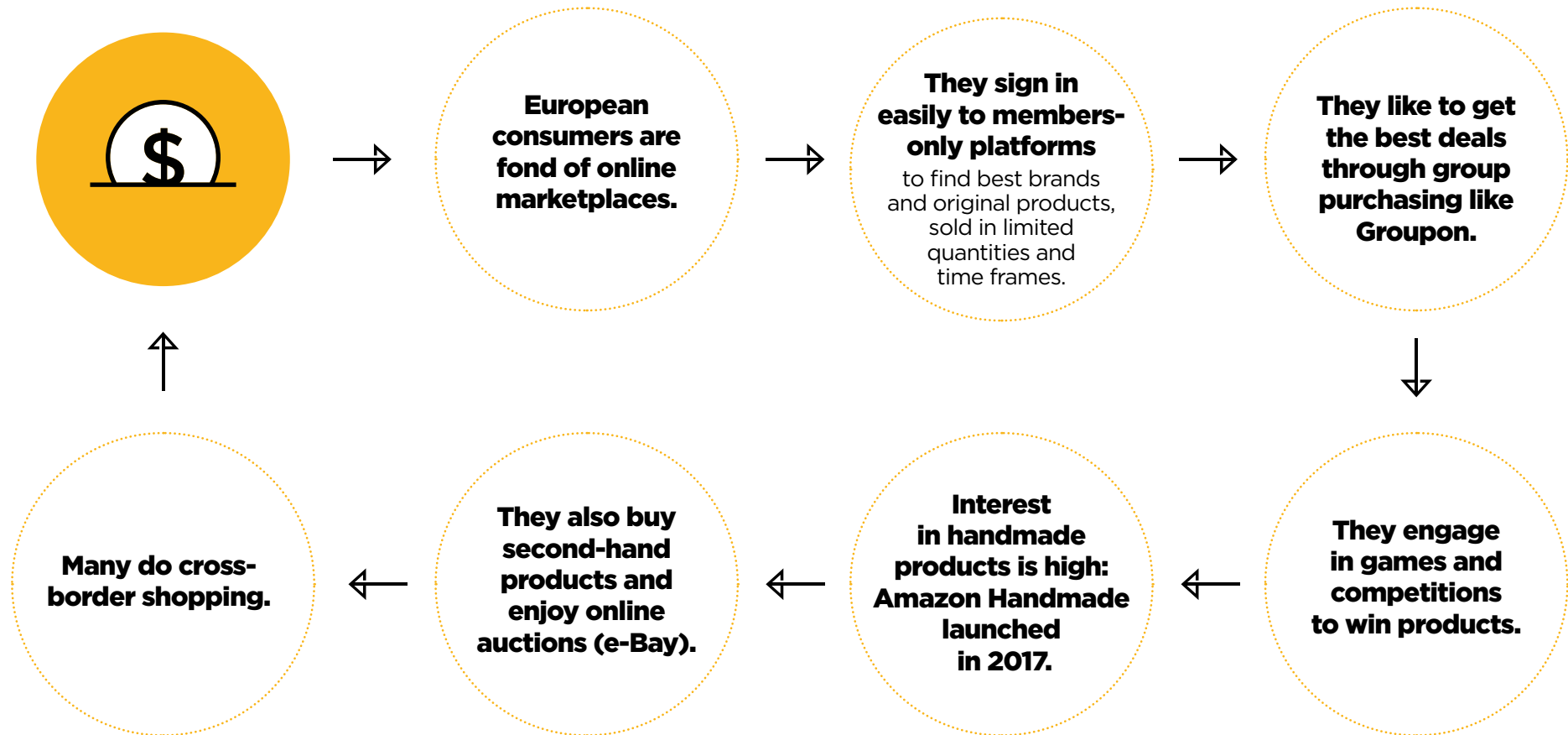- Only option to buy

Source: European E-commerce Foundation

Where do they buy online?

An overview of where European e-shoppers are most likely to make their online purchase.

|	
A retailer's website app	50%
An aggregator website or app	35%
An auction website or app	30%
A social media website or app	25%
A brand specific website or app	21%
A messaging app	14%

Source: European E-commerce Foundation

The quest for the best deal

$

European consumers are fond of online marketplaces.

They sign in easily to members-only platforms to find best brands and original products, sold in limited quantities and time frames.

They like to get the best deals through group purchasing like Groupon.

They engage in games and competitions to win products.

Interest in handmade products is high: Amazon Handmade launched in 2017.

They also buy second-hand products and enjoy online auctions (e-Bay).

Many do cross-border shopping.

New shopping behaviours

**Any Time,
Any Where,
with Any Device.**

**Research Online,
Purchase
Offline...**

..and vice versa depending on type of product and expected shopping experience.

They expect a seamless journey between online and in-store shopping.

Free delivery and free returns have become a standard

European consumers share a lot in social media and follow recommendations and reviews.

They always chase the best deal

Online shopping devices

Having a mobile-friendly website is an important part of doing e-commerce in Europe. More and more European consumers are using smartphones to purchase online, although laptops and desktop computers are still the main devices.

A look at preferred devices.

Device	Percentage
Laptop	61%
Desktop	52%
Smartphone	39%
Tablet	25%

Source – E-shopper barometer 2017
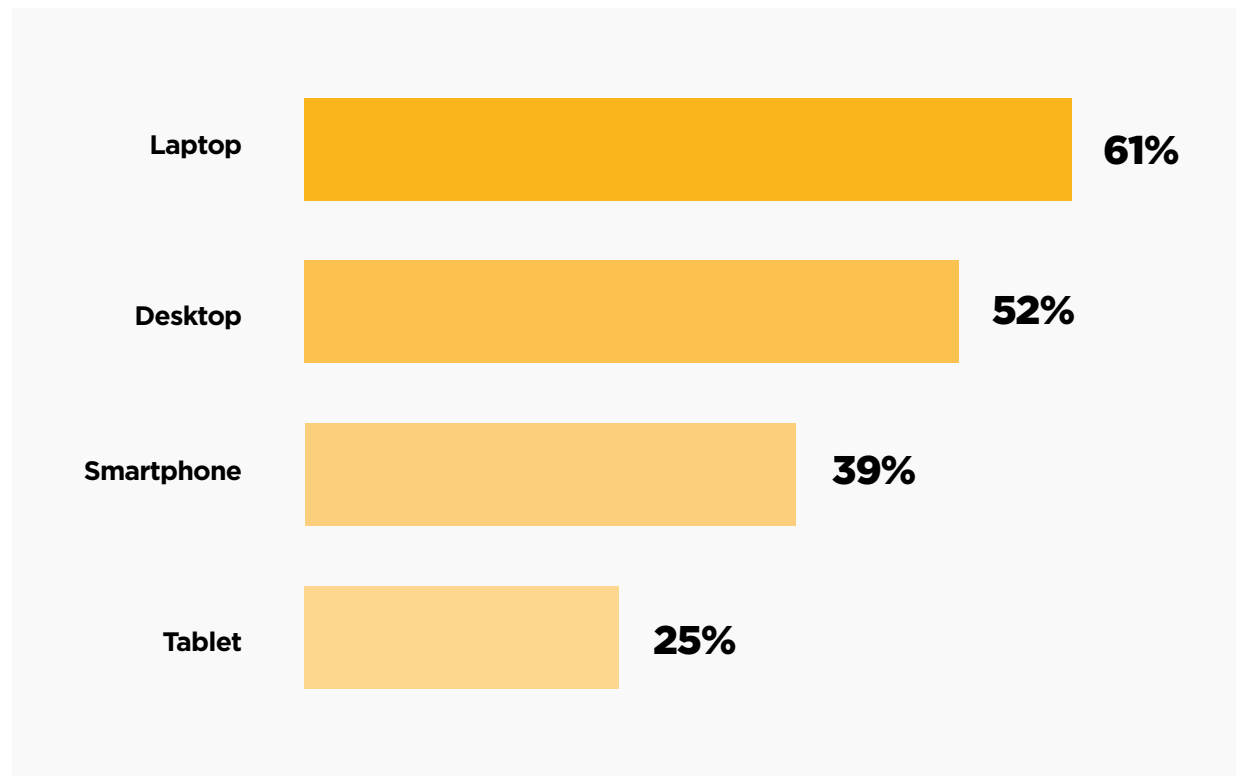
Online and in-store

Consumers use their smart phone while in-store to compare prices and products of various brands, share pictures and exchange shopping ideas with friends.

To develop a clear customer journey blueprint, an insight tool is crucial for marketers.

E-shoppers use their mobile at various stages of the purchasing journey

Looked for early inspiration and made initial discoveries online on smartphone

Country	%
France	**41%**
Germany	**41%**
Italy	**39%**
United Kingdom	**46%**

Compared choices online on smartphone

Country	%
France	**23%**
Germany	**34%**
Italy	**36%**
United Kingdom	**32%**

Source – Google consumer barometer 2018 – Example of France, Germany, Italy and UK

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The new power of word of mouth

Brand trust

The power of traditional advertising is losing strength as online consumers look to what other people they trust say about products and brands. This trust is a powerful motivator that helps your brand.

People power

The majority, 92%, of shoppers say they trust the opinions of people—even people they don't know—more than any other forms of advertising, such as digital display advertising.

→

92%

of shoppers say they trust the opinions of people– even people they don't know

Ratings and reviews

An online shopper will often read another shopper's rating or review of a product before deciding whether to purchase it, making it the perfect opportunity for your brand to influence shoppers.

The power of one

Even a single review has an impact and can produce a 10% lift in sales.

Reviewer influence

Reviews impact online sales and in-store sales, as 39% of in-store buyers read online reviews before making a purchase.

Happy customers

Many brands use the Net Promotor Score (NPS) to evaluate customer satisfaction.

Social groups and values

Social groups and values

Developing a target market is important when it comes to setting up e-commerce in Europe – here's an outline of the main social groups and their influencing values.

The four generations:

Baby Boomers
(1946-1964)

Embrace e-commerce while laying the foundation of a whole new and highly connected *silver economy*.

Gen X (1970s)

Are busy and in need of quick and easy shopping solutions.

Gen Y or Millennials
(1980s and 1990s)

Will form 44% of the workforce by 2025.
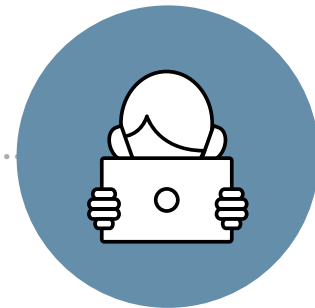
Gen Z (2000s)

Are tomorrow's shoppers and are totally immersed in digital, mobile and social patterns.

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Meet the influencers

Women: family gatekeeper

Typically the household manager and makes purchasing decisions for products targeting families.

Research online and in-store to find the best product or service.

Share information about their choices with friends and are inclined to recommend a product or a service to their close networks.

Holistic shoppers: they consider the functional and emotional benefits for the whole family.

Brand social responsibility, product origin and traceability are important.

The role they play at home is spreading to workplace purchasing.

Meet the influencers continued...

The GEN Z: experience seekers

Aged 19 or under, most live at home with their parents. Although they have little spending power, 93% of parents say their kids hold sway over what they buy.

They are intense social media users and readily share details of their lives, likes and dislikes across dozens of platforms online, often simultaneously.

They trust their peers rather than marketers and are not loyal to any one brand: 55% of them browse online to find the best deal. They prefer immediacy rather than waiting for a better product.

They expect brands and retailers to be available for two-way conversations, 24/7 in a seamless way. They want an identical brand experience, whether they are in-store, online or on their mobile device.

They expect personalisation: 46% of them want to be involved in the shaping of a brand's product.

Retailers must shift from offering new things to buy to new things to do, from telling a story to conversing.

55% browse online to find the best deal

93% of parents say their kids hold sway over what they buy

46% want to be involved in the shaping of a brand's product
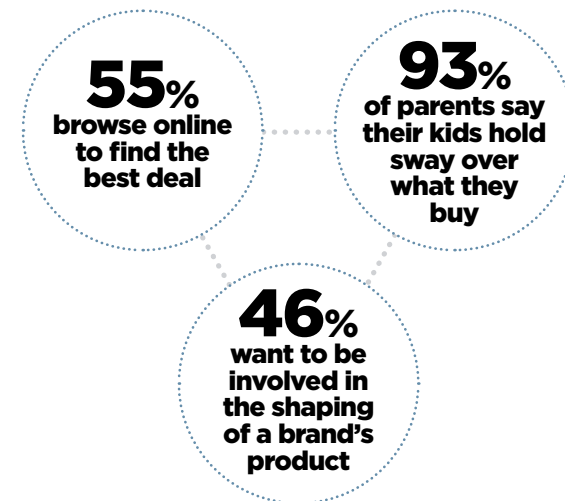
Meet the influencers continued...

Netizens: the citizens shaping the internet

Netizens, or citizens of the internet, are habitual internet users.

Highly influential due to their social networking habits and their constant use of mobile technologies and services such as Facebook, WhatsApp or Instagram.

Their communities may look from the outside like a web of strangers but on the inside, they form trusted friendships based on common interests.

They want to be game changers and re-shape the web, be part of its evolution.

An internet community will easily grow and become a strong force of opinion.

Cross-border shoppers – who buys on foreign websites?
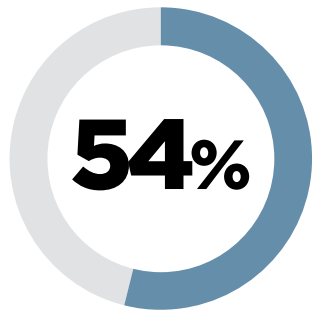
54% Of European male e-shoppers buy on foreign websites
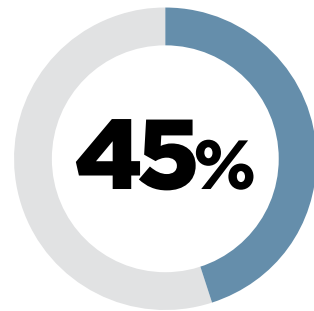
45% Of European 18-34 year old e-shoppers buy on foreign websites

E-shoppers who buy on foreign websites are higher income earners

67% → **39**%
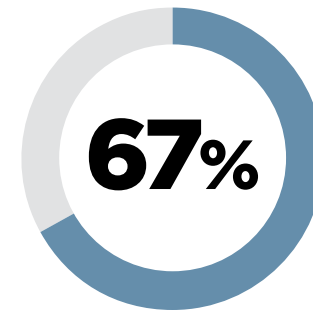
Of European e-shoppers have bought from websites within Europe
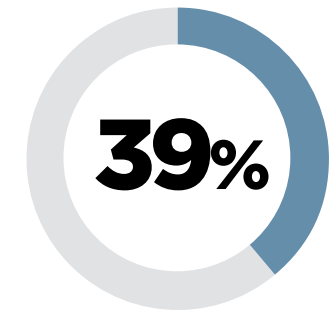
And 39% from neighbouring countries

67% →
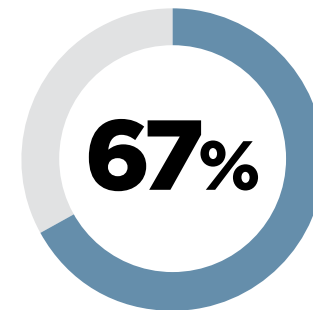
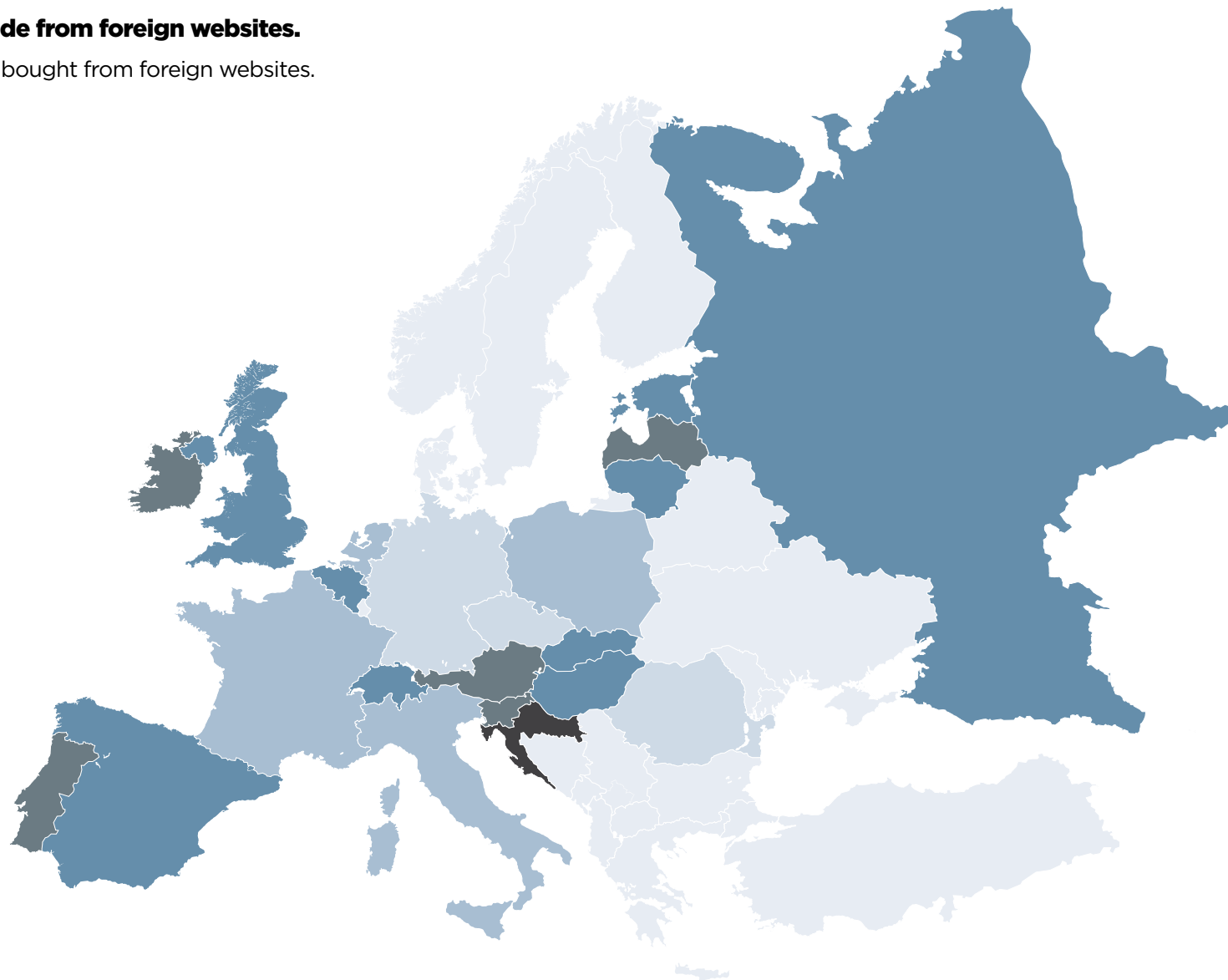Of European e-shoppers have bought from websites located outside of Europe

44% from China

31% from USA

Source – E-shopper barometer 2017

22
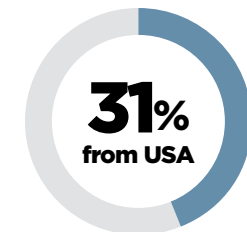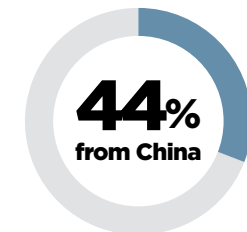
Where are the cross-border shoppers?

Average share of online shopping made from foreign websites.

% – Among e-shoppers who have already bought from foreign websites.

- ● > 30%
- ● 25–30%
- ● 20–25%
- ● 15–20%
- ● < 15%
- ● N/A

Values of online shoppers

Sustainability at heart

Trust matters

A number of sanitary crises and incidents – mad cow, bird flu- have deeply affected the European consumers' psyche; it eroded trust and triggered higher expectations in terms of corporate social responsibility, information transparency and product traceability. Greenwashing is easily spotted and conscious consumers do not hesitate to boycott brands.

Consumer awareness

Better educated consumers have a higher awareness about carbon and water footprints. It influences online purchasing behaviours and levels of confidence in imported products: Food and Beverage, Consumer Packaged Goods (CPG), cosmetics, products for children and fashion are the most scrutinised sectors.

European consumers want local and organic products

The European Organic Product Certification has become a holy grail for farmers, as well as for the food processing industry and retailers. Consumers check certification labels, some being local or trade specific.
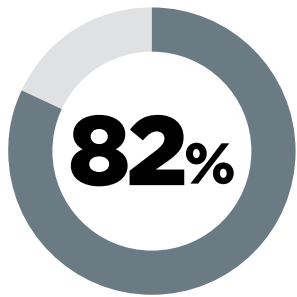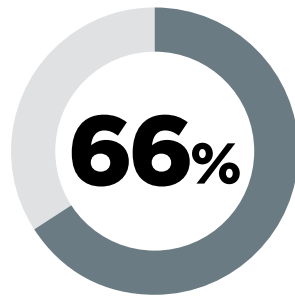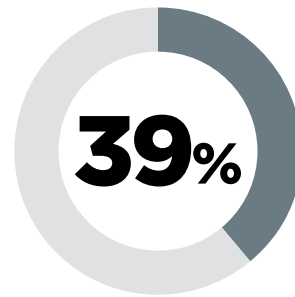
Europeans and social media

Social media use

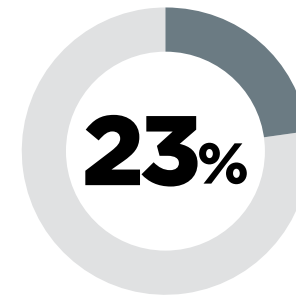An insight of how Europeans are interacting across the most popular social media platforms.

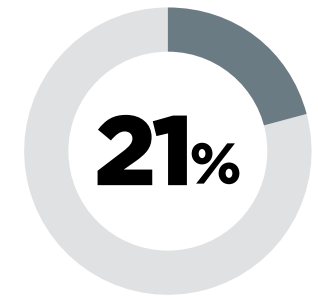**82%**

Use Facebook at least once a week

66%

Use Youtube at least once a week

39%

Use Instagram at least once a week

23%

Use Twitter at least once a week

21%

Use Snapchat at least once a week

Source: E-shopper barometer 2017

Europeans are socially connected

Number of active European social media users by country (in millions).

Country	Users (millions)
Russia	38
United Kingdom	37
France	29
Germany	28
Italy	28
Spain	22
Liechtenstein	13
Poland	12
Ukraine	11.16
Netherlands	9.3
Romania	8
Sweden	5.9
Belgium	5.7
Portugal	5.2
Greece	4.4
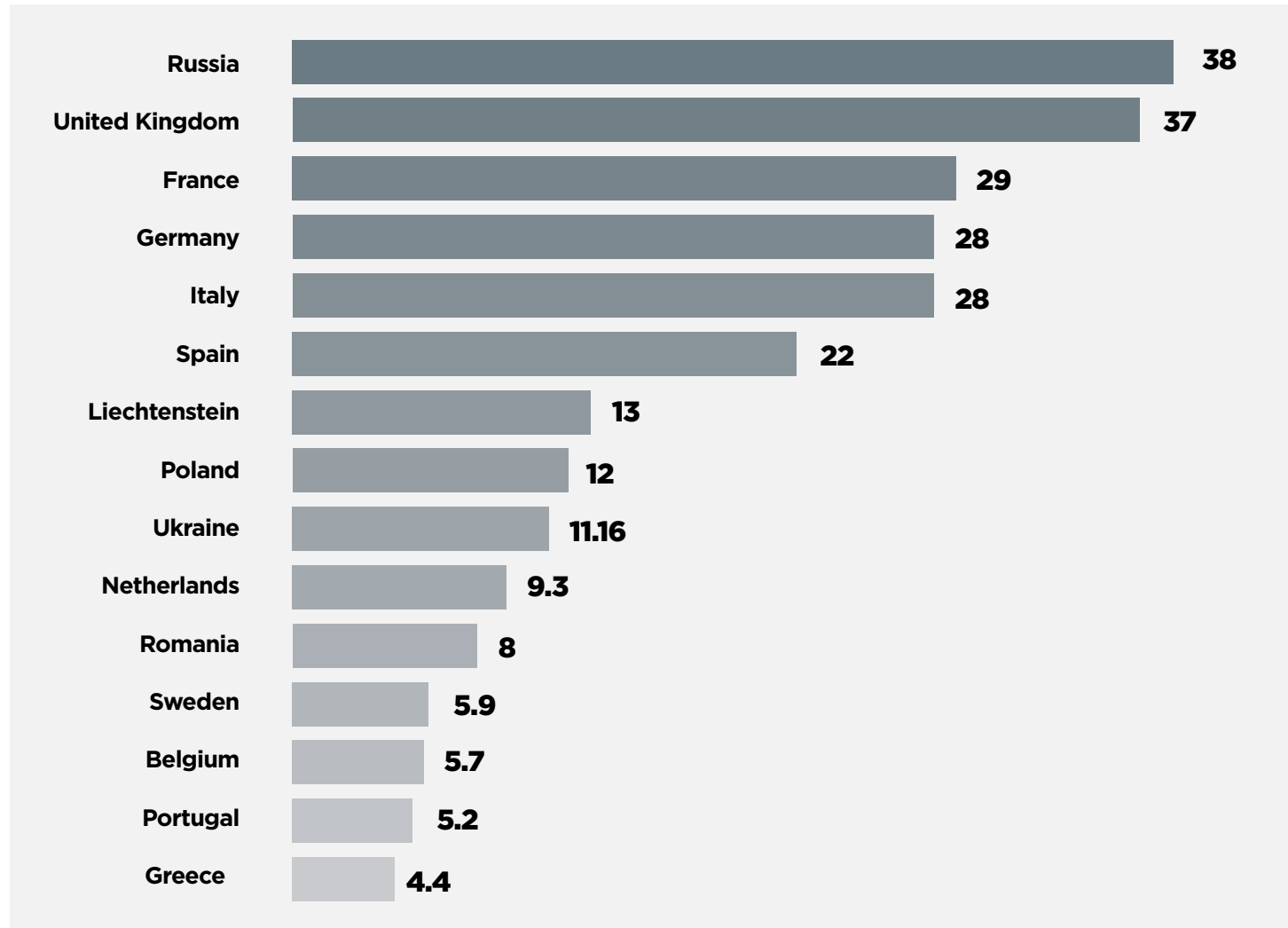
Source: European E-commerce Foundation

Preferred social media in Europe

Percentage of Europeans using each of the common social media platforms.

Platform	Percentage
Facebook	74%
YouTube	54%
Instagram	24%
Google+	21%
Twitter	20%
Pintrest	13%
None of these	13%
Linkedin	12%
Snapchat	10%
Tumbler	3%
Vine	1%

2B people are connected via Facebook worldwide
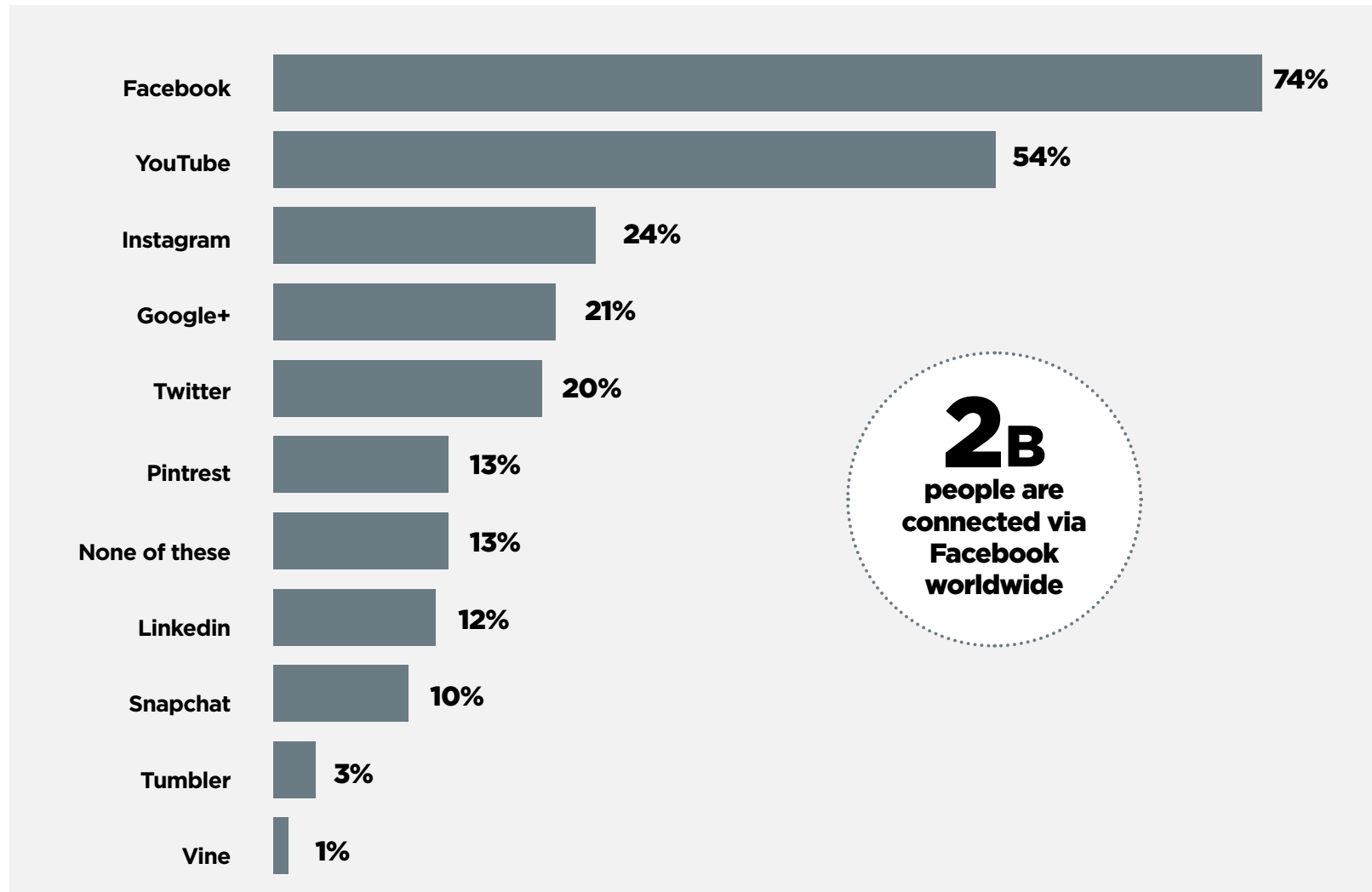
Source: Millenials - E-shopper barometer 2017

Delivery and payment

Delivery and payment

Deliver on choice

E-shoppers expect cheap and effective delivery methods. They want to choose the best mix of flexibility, convenience and transit time.

Collection options

Some are prepared to pick their parcel up themselves (58% in France). Alternative locations are parcel shops, post offices, retailer stores and workplace.

Innovation

Innovative delivery options are appreciated: next day delivery, real time information (e.g. SMS, e-mail), the ability to plan or reschedule delivery.

Stress-free returns

E-shoppers like to be able to easily return an order. The returns process should be easy, free and well explained in advance. Germany has one of the highest return rates in Europe, up to 70% for fashion retail.
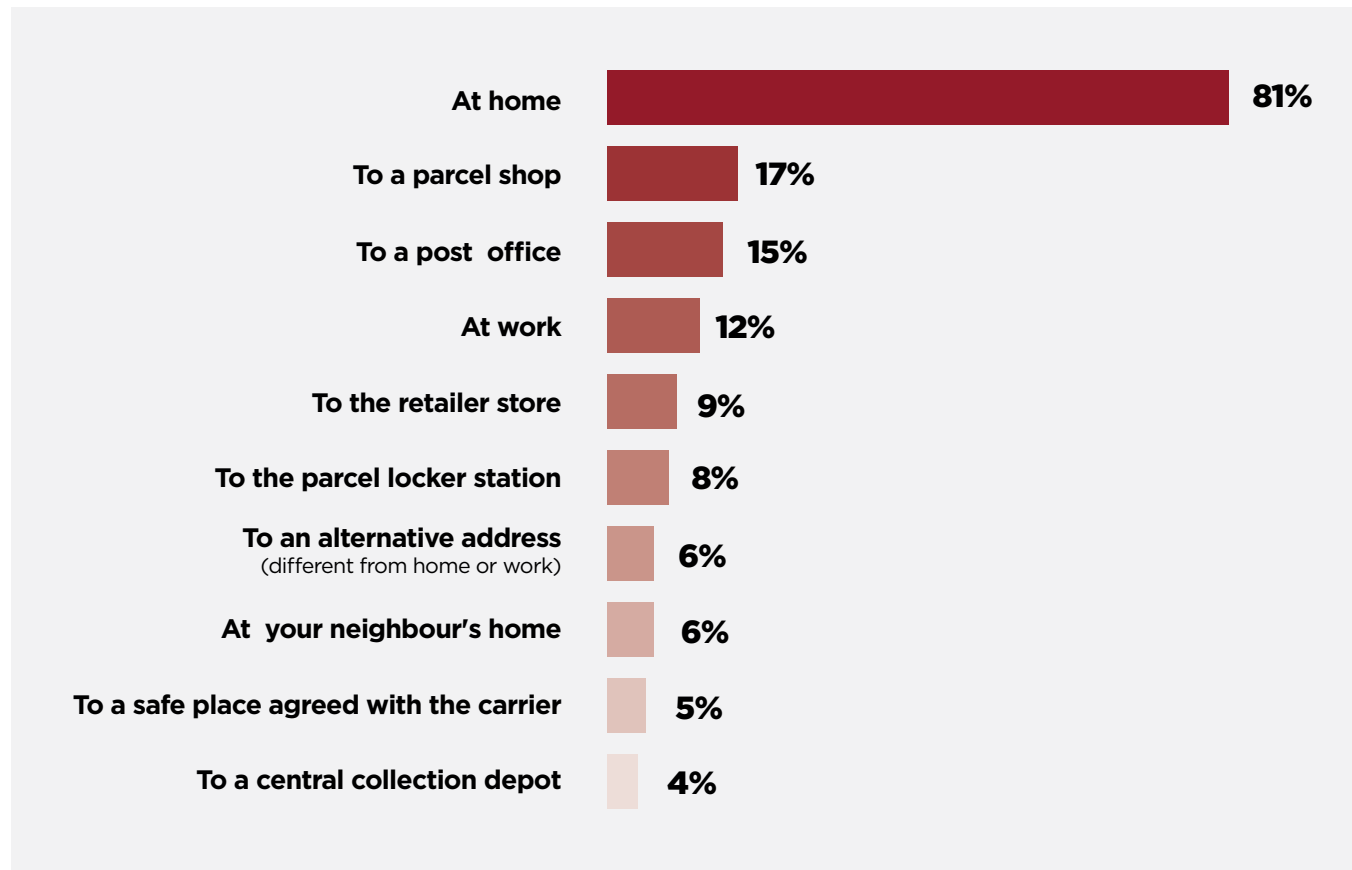
58%
of French e-shoppers
are prepared to
pick up their parcel
themselves

70%
Germany's return
rate for fashion retail
- the highest
in Europe

Main delivery preferences

European e-shoppers choose to have their parcels delivered at:
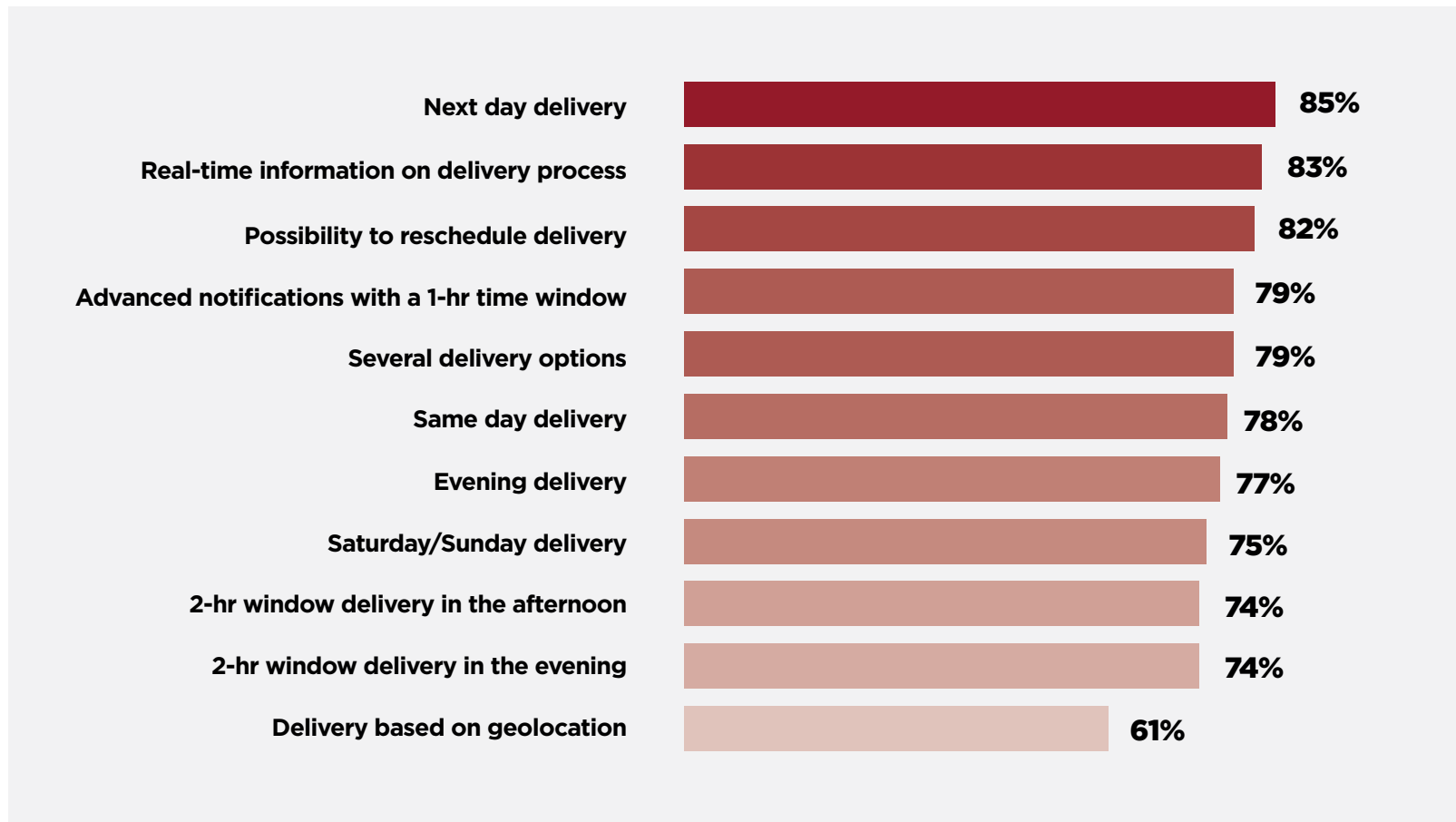

81%
Home

17%
Parcel shops

12%
Work
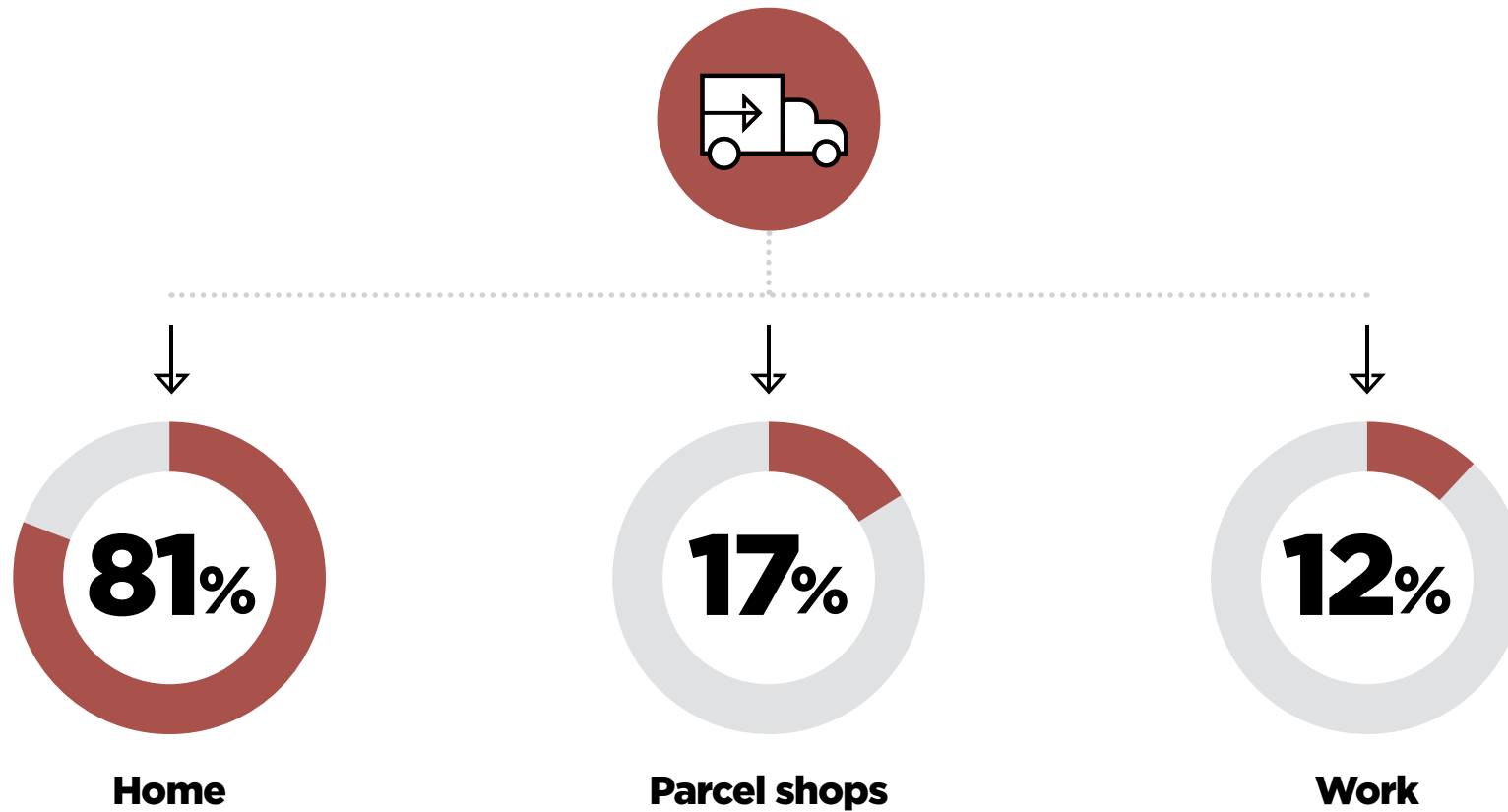
Alternative delivery places

A look at where European e-shoppers choose to have their purchases delivered.

Delivery place	Percentage
At home	81%
To a parcel shop	17%
To a post office	15%
At work	12%
To the retailer store	9%
To the parcel locker station	8%
To an alternative address (different from home or work)	6%
At your neighbour's home	6%
To a safe place agreed with the carrier	5%
To a central collection depot	4%

Source: E-shopper barometer 2017

Preferred delivery/return options

The percentage of Europeans who opt for flexible delivery and return options.

| Option	Percentage
Next day delivery	85%
Real-time information on delivery process	83%
Possibility to reschedule delivery	82%
Advanced notifications with a 1-hr time window	79%
Several delivery options	79%
Same day delivery	78%
Evening delivery	77%
Saturday/Sunday delivery	75%
2-hr window delivery in the afternoon	74%
2-hr window delivery in the evening	74%
Delivery based on geolocation	61%

Source: E-shopper barometer 2017

Delivery process expectations

E-shoppers are more likely to purchase from a website or e-tailer:
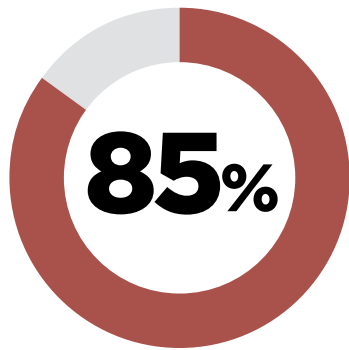
85% When next day delivery is an option
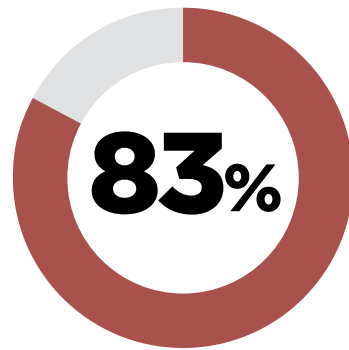
83% When real-time information on delivery time is available
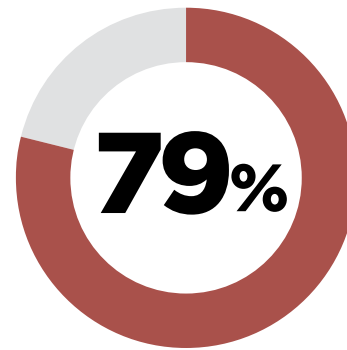
79% If they can choose the day and exact 1-hour timeslot of delivery
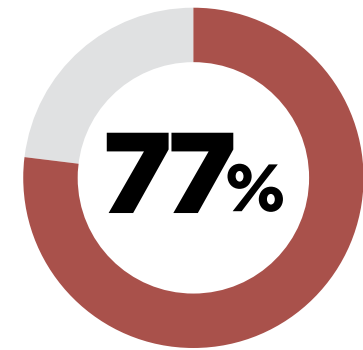
77% If they know the exact 1-hour delivery timeslot

Source: E-shopper barometer 2017

Most trusted payment methods

European e-shoppers seek speed, convenience and security when paying online. There are some similarities, and key differences, in the e-shopper's trust and habits across Europe.

E-shoppers use digital wallets (Paypal, AliPay, Applepay), or debit and credit cards in most countries.

Bank transfer or paying on invoice are common methods.

They appreciate the ability to pay by mobile. Methods differ from one country to another, and sometimes from bank to bank.

In central and eastern Europe e-shoppers prefer to pay cash on delivery.

Local payment options in Portugal (Multibanco), The Netherlands (Ideal), Poland (Payu) are preferred in these markets.

Preferred payment methods

The percentages of European e-shopper payment preference.

Payment method	Percentage
Digital wallet (Paypal, Alpay)	43%
Visa/Mastercard	35%
Domestic bank credit card/debit card	23%
Bank transfer	20%
Cash-on-Demand (COD)	13%
By invoice (and payment slip)	11%
Direct debit	11%
Store value cards/Virtual cards/e-money	8%
Payu	4%
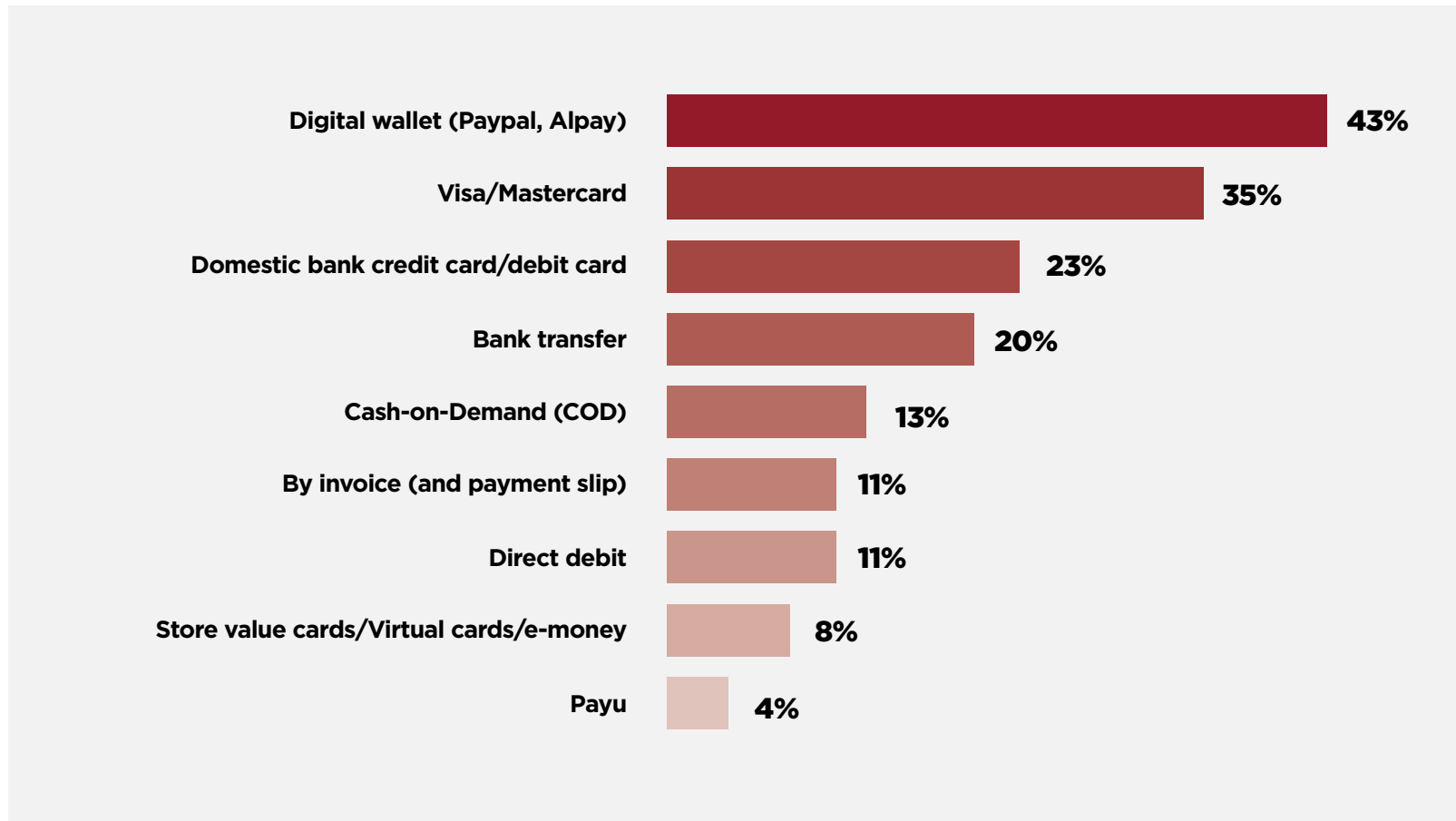
Source: E-shopper barometer 2017

B2B digital commerce customers

B2B digital commerce customers

Search

The majority, 90%, search for products online first. Most are registered users in trade related marketplaces, and B2B e-procurement is increasing steadily.

Buyer experience

Buyers expect a consumer-like purchasing experience through a range of devices and apps (cloud based platforms, responsive design, free shipping, free return, customer reviews, active chatbots).

Online platforms

B2B online platforms need to be user friendly and able to be personalised for client contracts (personalised dashboards, special deals, minimum orders, payment terms, delivery and storage options, warranty).

Millennials are the new buyers

Brand confidence
Millennials trust the brands they work with in the same way they trust friends. Millennials are willing to pay more for products from a brand they believe in and have a relationship with.

Relationships
Most B2B brands have strong relationships with their customers that are based on more traditional approaches such as personal connections that may not exist in the digital age.

Transparency
Buyers looking for clear pricing without gimmicks and discounts.

Reviews
Peer reviews are the gold standard when it comes to purchasing decisions.

Development
They will play key roles in product decisions, services and vendor selection as they migrate from midlevel management to executive positions.

User experience
They look for brand and product information that delivers frictionless engagement.

Be social
Get the story of your brand out on the social platforms millennials call home.

Millennials will be involved in

75%

of B2B purchasing by 2025

Source: Sapient Razorfish Insights 2017

Questions to chart your progress

Questions to chart your progress

1

Who and where are your European customers?

2

What are their main values and cultures?

3

How will their new purchasing behaviours impact your e-business?

4

Which delivery methods should you implement?

5

Which payment options should you offer?

6

How can you best handle free product return?

7

How can you listen to the voice of the European customer?

8

Are you ready to meet the expectations of Millennials and Gen-Z?

NEW ZEALAND
TRADE & ENTERPRISE
Te Taurapa Tūhono

New Zealand Trade and Enterprise (NZTE) is the Government agency charged with a single purpose: growing companies internationally, bigger, better and faster, for the benefit of New Zealand.

We employ 600 people, have over 200 private sector partners and draw on a global network of thousands more. We have people based in 50 offices, working across 24 time zones and 40 languages to support New Zealand businesses in over 100 countries. Our global presence lets us deliver value to the businesses we support, through our unique know-how (knowledge and experience) and know-who (networks and connections).

Our know-how and know-who is expressed in our Māori name: Te Taurapa Tūhono. Te Taurapa is the stern post of a traditional Māori waka, which records valuable knowledge, and stabilises and guides the craft forward. Tūhono represents connections to people and an ability to build relationships.

We provide customised services and support to ambitious businesses looking to go global. We help them build their capability, boost their global reach, connect to other businesses and invest in their growth. We also connect international investors with opportunities in New Zealand through a global network of investment advisors.

We call on our Government network and work closely with our NZ Inc partners and the business community, to grow our national brand and help businesses to open doors in global markets.

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A GUIDE TO E-COMMERCE EUROPE

Book 3: Designing the best customer experience

Know How →

NEW ZEALAND
TRADE & ENTERPRISE
Te Taurapa Tūhono

June 2018

A GUIDE TO E-COMMERCE EUROPE

Book 3: Designing the best customer experience

Welcome to this guide

The European consumer wants to live and share a 24/7 seamless experience, across channels and medias, from initial discovery to purchase, from payment to delivery, including product return options and other services.

These moments of truth can be either positive touch points or become pain points. Hence, companies aiming for customer loyalty and brand advocacy draw a detailed customer journey map and develop an integrated omni-channel strategy.

Your e-shop is the one-stop-space that links you to your customers before, during and after their purchase. And there is a big difference between designing a good looking e-commerce web site and running a digital business that converts leads into sales.

The online purchasing process has to be easy for your customer, supported by a powerful software solution, up-to-date technical features and compelling content. All this is valid both for B2C and B2B companies.

This third book gives you a glimpse into omni-channel experience, e-shop design and management, as well as key success factors and common pitfalls.

The further three books in this series of guides commissioned by NZTE focus on:

- Book 1: The European market dynamics
- Book 2: The European consumer
- Book 4: Improving e-commerce performance.

Author: Marianne Kopf

What's inside

SECTION 1

A seamless customer experience

A seamless customer experience

European online shoppers want their shopping experience to be easy and stress-free, whether they're browsing products from computers and mobile devices, or popping into a store. New Zealand companies need to think of their e-store as an all-encompassing roadmap for buying their products.

Multiple devices

E-stores need to be easy to use on multiple channels, from mobile to desktop, and offer options to develop loyalty.

Build relationships

To integrate their customers' experience, companies need to use tools of the IT trade, such as CRM, to gain an overall view of the customer relationship.
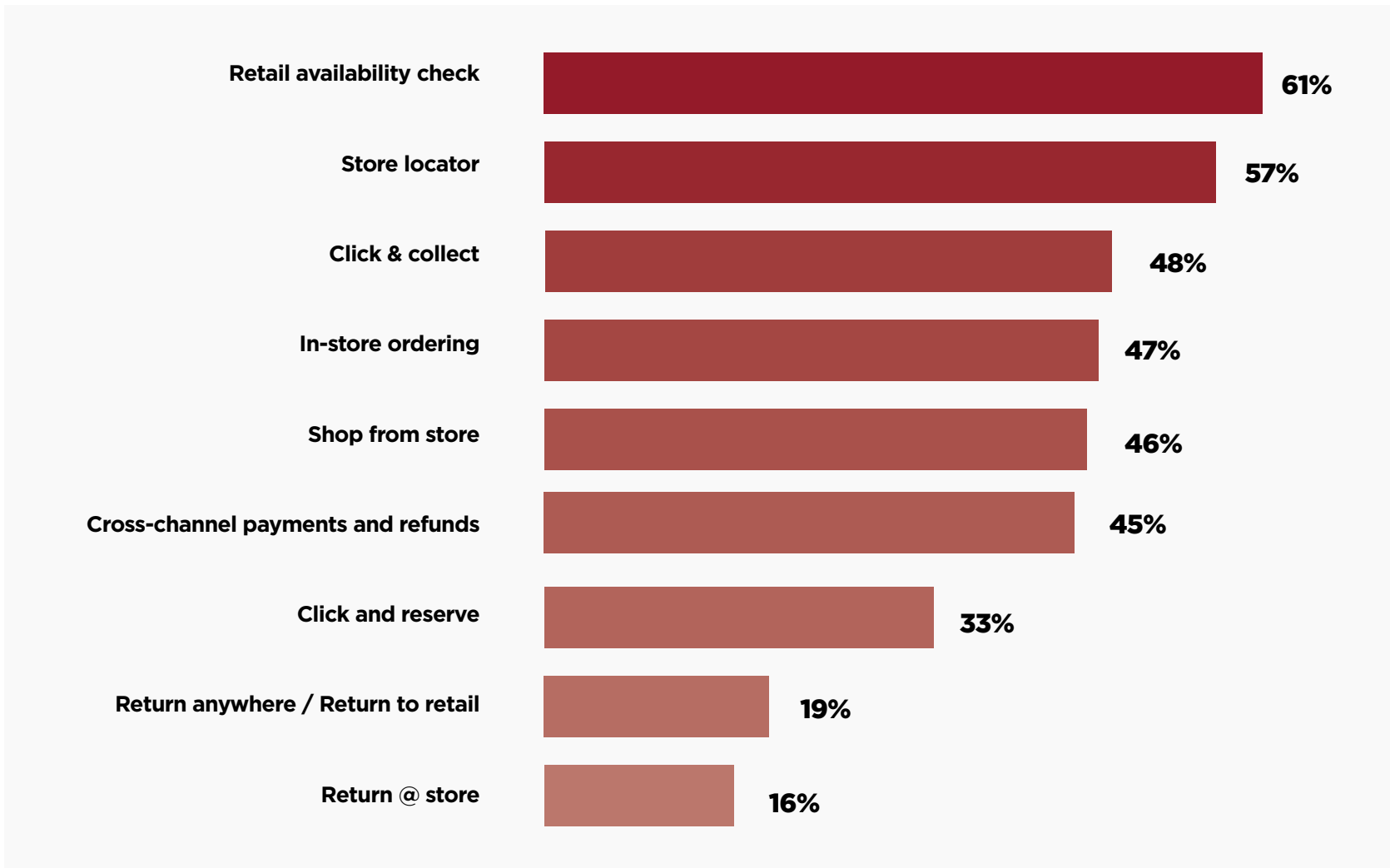
Be personal

E-stores need to offer a personalised shopping experience, which will drive increased engagement, loyalty and sales.
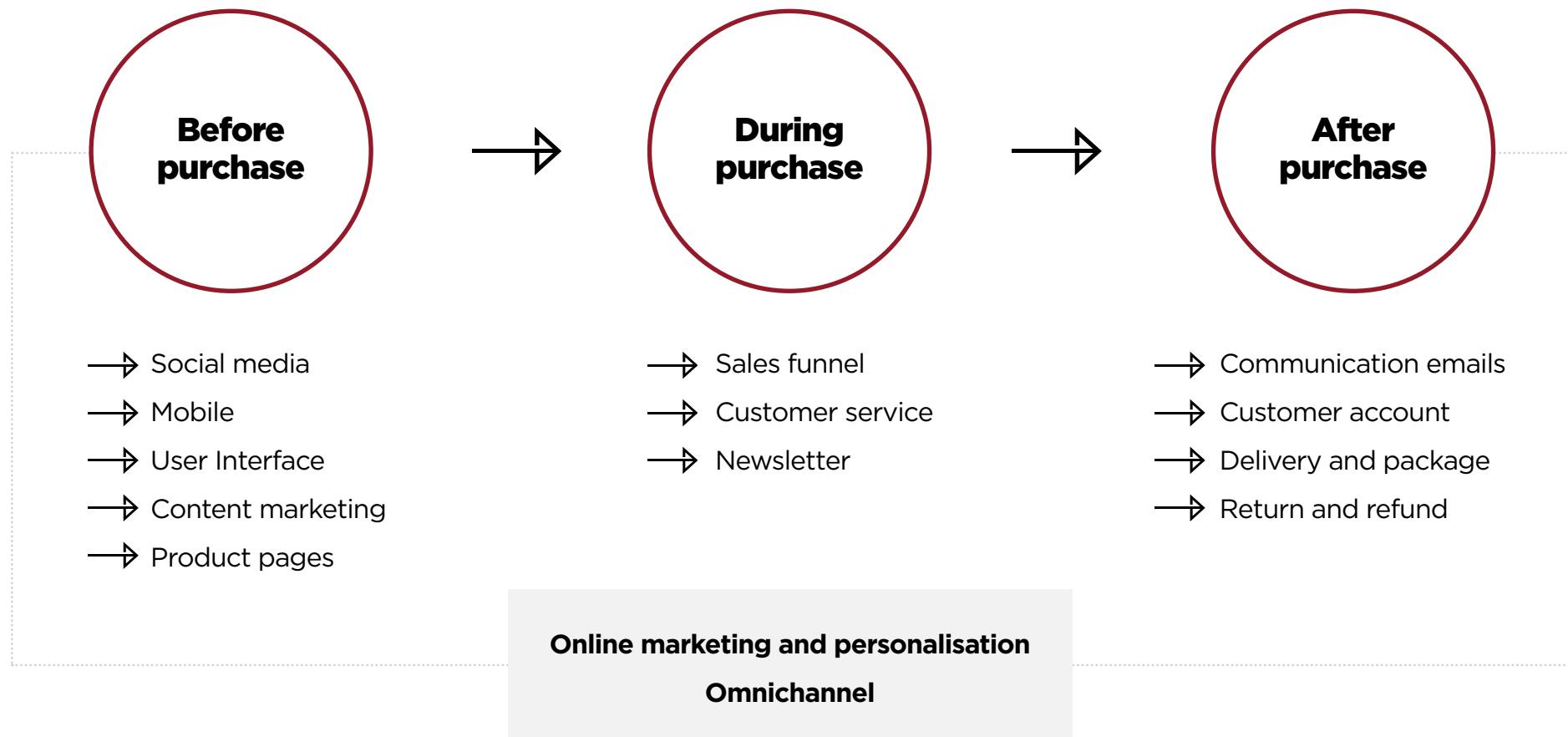
Elements of an omni-channel experience

The preferential features for an e-shopper:

Feature	Percentage
Retail availability check	61%
Store locator	57%
Click & collect	48%
In-store ordering	47%
Shop from store	46%
Cross-channel payments and refunds	45%
Click and reserve	33%
Return anywhere / Return to retail	19%
Return @ store	16%

Source: E-commerce Foundation

Map your customer's journey

An online shopper's journey to your e-shop does not start on your home page – it begins with other encounters with your brand. Each time a potential customer comes into contact with your brand, they decide whether to make the next step towards your e-store. Make sure all elements of your brand online reflect the brand's values and that each step towards your e-store is tailored for your customer.

Before purchase → **During purchase** → **After purchase**

Before purchase
→ Social media
→ Mobile
→ User Interface
→ Content marketing
→ Product pages

During purchase
→ Sales funnel
→ Customer service
→ Newsletter

After purchase
→ Communication emails
→ Customer account
→ Delivery and package
→ Return and refund

Online marketing and personalisation

Omnichannel

Working with multiple sales channels

Retailers in Europe's top three online markets (UK, Germany, and France) are selling across multiple channels, including online marketplaces and their own branded e-stores. They integrate the in-store and online customer experience.

Involving distributors and retailers in your e-commerce strategy is crucial to your success.

Multiple outlets

Be aware that your distributors or retailers may want to place your brand and products on their own e-shop or on a marketplace of their choice.

Small print

Regularly review any franchise agreements to include e-commerce rules and obligations.

Conversations

Maintain a relationship with your in-market partners and talk regularly about your online strategy.

Trends in a seamless customer experience
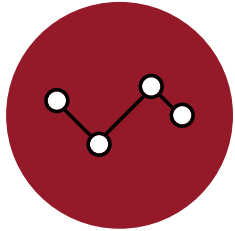
Centralised call centre services, customer database consolidated across channels.

Inventory levels of products in the retail store can be checked in the online store.

Internet kiosks in the retail store enable customers to check product availability online.

The shopping cart is stored across online and mobile channels.

An integrated purchase history is kept online and in store.

Future purchase recommendations are made based on past consolidated purchases.

Customers can track their orders and get access to their wish list across different channels.

Customers can pay for their online purchases in a physical store.

Customers can receive a refund in cash in the store for a product originally ordered online.

They can return products purchased online in the retail store.

Vouchers can be redeemed.

What makes a winning e-shop?

Key objectives for your e-shop

Welcome online visitors to your e-shop with an engaging introduction to your brand that works smoothly on any device.

Convert visitors into customers and convince them of your product and your brand values.

Facilitate their journey from random browsing to filling their cart and placing an order.

Give clear and accurate information on terms and conditions, products, pricing, special offers, payment, delivery and return options.

Offer continuity once the order has been placed, through delivery tracking services, notifications and regular personalised communication.

Follow-up on first order customers and offer them a personalised selection of products.

Ensure you keep in touch with your customer after purchase to develop the relationship and encourage loyalty and brand advocacy.

Define your customers

Don't make the mistake of marketing your products before you've defined your customer.

Example of a customer persona

Sarah

Sarah is looking for fun and adventure, but is concerned about safety.

She prefers local one day treks and hikes.

→ **About**
- 30–50 years old
- BA qualification
- Professional: dual-income
- Possibly married, no kids

→ **Outdoor pursuits**
- Scenic treks
- Hikes of moderate difficulty

→ **Watches**
- Premium TV (HBO, Showtime)
- NatGeo
- Coven
- Dancing with the Stars
- Sons of Anarchy

→ **Reads**
- Backpacker
- Women's Adventure
- Natural Health
- Women's Health

→ **Career**
- Senior roles
- Management positions

Site priorities

→ Easy to find local day trips

→ See how exciting the great outdoors are

→ See the potential for new friendship

Potential solutions

1. Trip planning made easier. Decide into categories of difficulty, length, and locality

2. Trip and story packages should be visual and include images of adventure. People in groups and friends having fun.

3. Introduce a way for her to easily connect with others: Facebook, Twitter integration for example

Offer a great user experience

Online shoppers are looking for a seamless, easy customer experience. Each step of their journey to your e-store presents new risks.

Effortless purchasing

Customers will go elsewhere if the purchasing process is too complex, or if the information online is irrelevant or outdated.

User interface

A well-designed e-store that is easy to navigate and attractive to your customer will speed up the buying process.

Provide a shortcut

The less clicks to reach a product page, the better. The homepage should have direct access to product pages, portfolios and offers.

Make your e-store visually compelling

Easy on the eye
European e-shoppers click if they like the look of a website. Ensure your images are professional and aligned with your brand's style.

Be on brand
Use branded illustrations, logos, labels and product promotions to differentiate your brand.

Interactive actions
Provide visual guides on your e-store such as infographics, icons, action buttons, animated elements (moving sliders, text and headers).

Visualise your brand
Short, professional videos are a good drawcard and can help tell your brand story.

Choosing your e-store name

Getting the name right for your online store URL will help to attract more customers and interest in your brand.

Localise your URL
European customers prefer local names for URLs, with .fr or .de or .co.uk extensions. To register a .fr domain name, you need to have a real address in France.

Instinctive localisation feature
An option is to follow the lead of international brands and use an automatic geo-localisation feature that guides the user to their local site.

Grow trust
Choosing a local URL will help to develop trust in your brand.

Brand specific extension
It is now possible to register your e-shop with a ".your brand" extension.

Manage your e-store brand
Once decided, you can buy, sell, park and manage your e-store name URL on a number of online platforms, such as Network Solutions (US), Eurodns or Sedo (Europe).

SECTION 3

Content is king

Telling your story

Your brand is unique. Your e-store needs to tell your brand story in a way that builds trust and creates an emotional connection with customers.

Create a spark
Developing the story of your brand and products will trigger your customer's interest.

Consistency is important
The tone and key messages of your brand need to be aligned throughout your online and in-store activity.

Ask the professionals
Many content production providers can be found in Europe.

Smart partners
Choose agency partners who know about your business sector, your competition, as well as the country, language and culture of your targeted customers.

Social responsibility
Your story should include information on sustainability, ethical supply chains and corporate social responsibility. These are topics Europeans like to read about.

Show and tell - product pages

Be relevant
Product pages need to cover key information, relevant data, special offers, key features and detailed pictures.

Functionality
Viewing options will support your customer's decision process, such as zoom, different angles, and filtering by price, size and colour if relevant.

Clear postage options
Delivery and return options should be visible on product pages.

Product insight
Clothing retailers need to provide size conversion charts for clothing or shoes, which are different in Germany, France, Italy and UK.

Compliance
Produce pages must clearly state the compliance to EU regulations for consumer packaged goods.

SECTION 4

Filling up the cart

Creating a stress-free and memorable purchase journey

Focus on making the purchase journey quick and easy

Help customers add more items to their cart by showing related products on each individual product page. These are products that complement their original choice.

Personalise their order with special offers. These could be tailored to large orders, seasons, or promotions.

The experience continues when customers open their parcels. Packaging can convey a brand's image, include information on future offers, and be gift-like.

Have a clear call to action

A button on the homepage or main menu can guide your customer on a quicker journey to filling the cart.

You may also use a button for subscriptions to your newsletter or to join the brand membership.

The pros of pop-ups

Many online retailers use pop-up messages that appear while the customer visits your website. Pop-ups help to trigger shoppers' interest and generate sales and subscriptions

The 5 most popular pop-ups:

1 Welcome

Appears as soon as your visitor arrives. You can use this tool to quickly convey new information – for example, a sale.

2 Exit

Appears when your visitor moves the cursor to leave the page. This pop-up offers a deal that's difficult to refuse, in a bid to retain the potential customer.

3 Behaviour-driven

Appears when a visitor follows a certain pattern and the pop-up offers what they are looking for.

4 Time-driven

Appears when a visitor has spent a certain amount of time on your site, this pop-up offers them more content.

5 Push notifications

These are alerts sent to your visitor's smartphone via their browser.

A welcoming landing page

A landing page is any page a visitor lands on after clicking through from an advertisement or some form of online marketing. These are standalone pages that you send visitors to, and are designed for a specific marketing campaign.

Create a buzz
A landing page is accessible only from the link you're providing in your marketing content.

Visual impact
The purpose of a landing page is to attract potential customers to your e-store.

Call to action
Landing pages provide an attractive offer or information that encourages a potential customer to click through to a shopping cart or checkout.

Engage the customer

People power
Customer generated content is important: reviews, comments, product rankings may be interesting for some retailers but not aligned with the brand image of others.

Shareability
Europeans are very active in social media, where possible give them the opportunity to share your content on popular social media platforms.

Know the do's and don't

Cookies
Websites in Europe need to clearly mention the use of cookies and get the visitor's consent. This "cookies information banner" has to be updated every year.

Selling alcohol
If you sell alcohol you need a visible disclaimer when a visitor first opens your website, to confirm the visitor is of legal drinking age.

Host
Any website should clearly state who is publishing the site and hosting it.

Terms and conditions
These, as well as privacy policy, have to be visible on all pages. Data privacy is being reinforced in 2018 in Europe *(GDPR)*.

Trends in online shopping experience

Trends in online shopping experience

There can be a lot of hype over digital trends in the retail world - staying one step ahead does not necessarily mean jumping on the latest innovation. Make sure the tools you use help improve the customer's shopping experience.
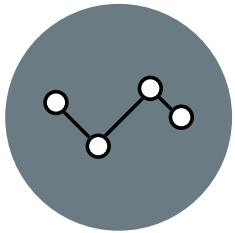
Transparency about product's components and country of origin.

Mobile apps, including payments, special offers redeemed in store, in-store information (map, news, events) and contact with sales people.

On the spot interactivity with the shopper via live chat and other web call features.

New and faster delivery options:
Amazon Drone & Locker.

Online marketing and personalisation based on browsing and previous purchases.

Online pop-up stores to test or launch a product or to support an event in-store.

Seamless services between online and in-store, such as click and collect, return and exchange, book an appointment in-store.

Devices in-store to check product availability or place an order.

Technical know how

Good design functions

Search engine optimisation

Integrated search engine

Security plug-in

Google & shop analytics

Shop management dashboard

Responsive design

Meaningful domain name

Localisation /currency

Excellence in content

Personalisation

Social media sharing

Get the basics right

Trustworthy ISP
Choose a trustworthy Internet Service Provider (ISP) to host your e-shop, preferably on a dedicated and secured server.

CMS
Select a content management system (CMS) and technical solutions that enable you to easily update your content (images, text, pricing, offers).

Responsive
Use a responsive design suitable for smart phones and tablets as well as laptops and computers.

Multi-channel
The website should also support all the current web browsers such as Explorer, Firefox, Chrome and Safari, to guarantee the same quality of experience to PC and Mac users, anytime, anywhere.

Software options
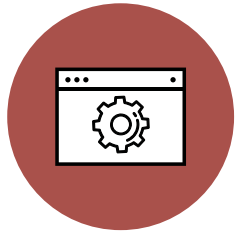
SaaS (Software as a Service)

You pay a monthly or annual fee for a ready to use e-shop. Cheap and fast option for small and medium sized shops. Little customisation. Fully dependent on updates by the provider.

Example: *Shopify*, often recommended for social commerce.

Open Source plug-ins (extensions) uploaded to your web site

This offers more visual and technical features, but every time you update your CMS you will have to update your e-shop plug-in. Minimum features are free. Not much personalisation. Some cyber-security issues may occur.

Example: *Woocommerce* for Wordpress.

E-shop software with a dedicated CMS

This is the preferred option as it offers flexibility and creativity. Solutions to link your e-shop to a marketplace or a company ERP (enterprise resources planning). More robust solution, more expensive, will support your growth and changing needs overtime.

Examples: *Prestashop* and *Magento*

Ongoing investment

Design and development costs for an e-shop depend on the size of your business, whether it is a single or multi-currency and language site. It also depends on the level of security expected and your IT infrastructure.

Operational costs

These include IT services, personnel, photo and video production, copywriting, specific web designs or imagery, translation costs. Also technical maintenance

Technical costs

These include web hosting, renewing registered domain names, and search engine optimisation (SEO).

You will need to plan a budget for SEO:

Professional SEO services cost from €6,000 to €12,000 per year depending on your market maturity, the number of pages and products, the complexity of your content, etc.

→ Professional
SEO services
cost from

€6-12k

per annum

Get found with SEO

Online shoppers are most likely to find your e-store through a search engine. Google is the most popular search engine for 96% of Europeans, thanks to its efficient algorithms and associated services.

Start the climb
The top ten results on the first page of a search engine get about 95% of all clicks on generic search results. Appearing amongst the ten first responses on a specific search is difficult to achieve.

Make the investment
Invest in Google AdWords and SEO tools and services.

Your content should be SEO
Using words and phrases that search engines will recognise and promote will improve the chances of visitors clicking through to your website.

Long tail key wording
An integrated search engine using long tail key wording is also expected from experienced e-shoppers.

Search friendly descriptors
Adding captions and descriptions to your images will help with SEO.

Customer centric
Choose keywords that your customers would type in, not just your product names or brand jargon.

B2B implementation challenges

Catering for B2B

There can be a number of challenges in online B2B implementation.
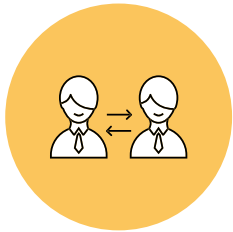
Confidence to deal online
In B2B, cyber-security, confidentiality issues and seamless integration with IT & business systems are essential for e-procurement specialists.

Pricing policies
Managing price will require B2B retailers to establish and enforce minimum advertised pricing (MAP) and pricing policies into the distribution channels.

Analytics
Big data and live analytics are needed to enhance the customer journey in real time, to inform in-house "touch point" teams and ultimately increase sales.

Future proofing personnel
B2B companies will also need to hire/train new talent who can fully embrace digital commerce, develop services that will respond to the next generation of buyers and lay the foundation of new business partnerships.

Benefits of e-commerce for B2B sales teams

Operating a digital B2B sales platform also has its advantages.

Increase efficiency
Beyond faster response time and enhanced customer satisfaction, self-service offerings free up sales and service teams to spend more time building relationships with customers, including cross-selling and upselling products.

Profit margins
Sales teams become trusted advisors, reducing the average cost per transaction and increasing profits.

Extra customer focus
Teams can concentrate more on marketing and on high volume customer relationships.

Digital sales tools
B2B sales teams get empowered with digital sales tools such as real-time inventory information, product data, instant ordering and flexible delivery options.

Advantages of operating B2B e-commerce programmes

Value B2B decision makers see in their current e-commerce programmes for customers:
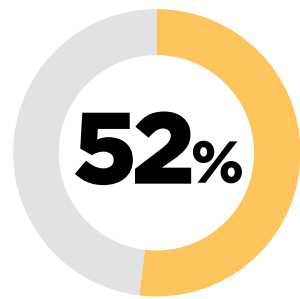
52%
Tailored product offerings

48%
Order automation
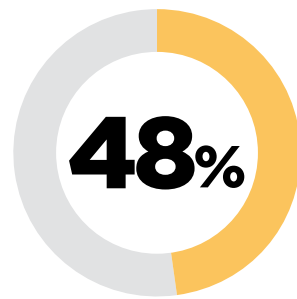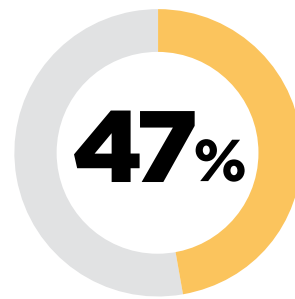
47%
Contracted pricing
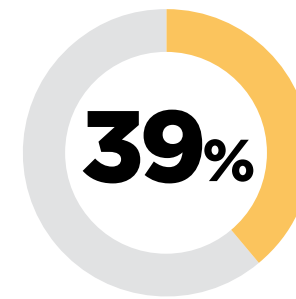
39%
One-click checkout
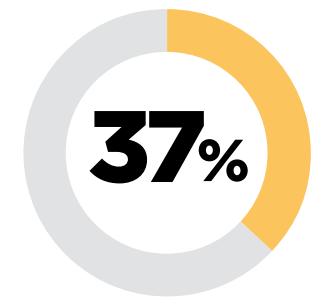
37%
Tailored recommendations
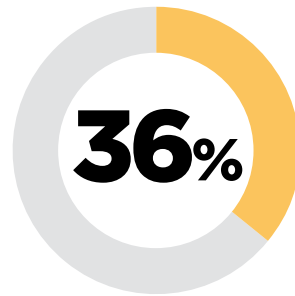
36%
Fast customer service through online chat
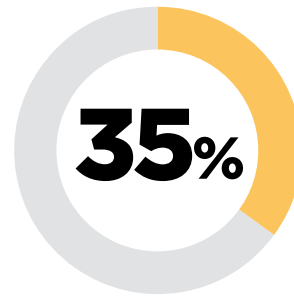
35%
Self-service ordering
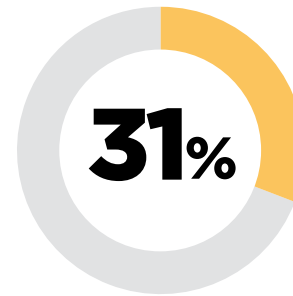
31%
Exclusive online-only products
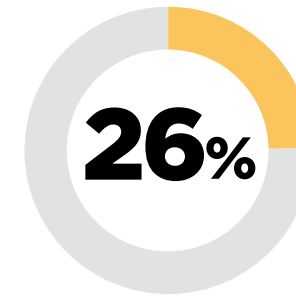
26%
Order history from previous interactions

Source: Cloudcraze.com

SECTION 8

Tips to overcome common mistakes

Common e-shop implementation hazards

1 **Once the e-shop is online do not leave it to fate.** This is when the work really starts! Prepare for a step by step launch.

2 **Be willing to adapt.** You need to refresh the product offering, provide customer support, do inventories, manage stock, offer sales deals. Make sure you have the people and resources to keep your e-shop open and measure its performance.

3 **Online stores are open 24/7, often in many languages.** Only offer chatbots, live chat or both when someone is online to respond.

4 **You will need to overcome resistance to change.** Allocate time to educate and engage with your personnel and channel partners long before you go live. How can you best handle free product return?

5 **Do not spend all your time making the e-shop look perfect** and underestimate the back-office work (administration, IT, CRM, ERP, SEO). Plan your project carefully.

6 **Do not underestimate your e-marketing budget** and the time needed to develop brand awareness in Europe, on the web, in social and other media.

7 **Focus your energy and resources on customer satisfaction**, not on technical performance.

Questions to chart your progress

Questions to chart your progress

You've read the guide, now it's time to reflect on your plans to tackle e-commerce in Europe.

1 Do you have a clear understanding of your customer's journey?

2 How can you design a seamless strategy across mobile devices, in-store and desktop that enchants your customers?

3 How can you get your current distribution partners to embrace e-commerce?

4 How can you design, set up and manage your e-shop?

5 How will you produce and update your e-shop content?

6 Which are the key new e-commerce features you should implement?

7 What are the IT, cybersecurity and regulation issues to consider?

8 What will your investment and ongoing operational costs be?

9 How can you improve your e-shop's visibility?

10 How can you avoid the most common mistakes?

Index of document links

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Book 4: Tools for successful e-commerce

Know How→

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June 2018

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Book 4: Tools for successful e-commerce

Welcome to this guide

Your online shop is a business of its own, not just a website. Its performance will improve if you invest time and resources in its development and promotion.

You will need a branding strategy and draw on a range of digital marketing tools and methods to increase traffic and convert leads into orders.

With the rise of social media new, advertising and brand positioning approaches enable you to enrich the conversation with your customers and to build up a community of followers that may recommend your brand and products.

Most e-marketing techniques, as well as your content management system and e-shop software come with easy to use online monitoring tools. This is important because you will need to evaluate and measure your success in order to adapt your e-commerce strategies and tactics along the way.

This fourth book of the NZTE guide to e-commerce in Europe covers topics such as branding, use of social-media, e-marketing techniques and e-shop performance metrics.

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Author: Marianne Kopf

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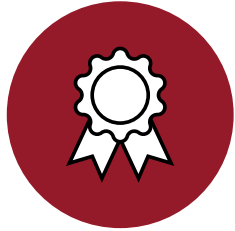
SECTION 1

Tell your brand story

Make your brand stand out from established brands

A brand is more than labels and logos – it's a story about a company's creation, values and vision.

Branding is all about personality and differentiation. To succeed in Europe, you need a strategy to communicate what is special or unique about your brand.

Before buying your products, European shoppers will want to know who you are, where you operate from and what your brand stands for. Your brand will need to stand out from established European brands.

You're from New Zealand – will that be a key part of your brand? Having a New Zealand origin story could give your brand an advantage.

Many Europeans think of New Zealand as they've seen it in major movies, a place of vast landscapes and preserved nature.

They may also associate New Zealand with organic and genuine products, nice relaxed and enthusiastic people.

New Zealand is known for the All Blacks, sailing, agriculture, wine, wool and kiwifruit – and a place where European millennials want to study.

Images help tell a story

→ The way products are presented and how people appear in photos can give a certain impression to European consumers. Make sure not to fall into Kiwi stereotypes.

→ *The New Zealand FernMark licence programme* gives licensees the right to carry the FernMark

→ *New Zealand Story Group* provides resources and tools to help tell your story.

→ You may still need to do a professional photo/video shooting to talk to Europeans.

Tap into digital marketing

Invest in content marketing

Attracting attention to your brand can be as easy as sharing relevant online content.

Content marketing is one of the most popular ways to tell your brand story and stimulate interest in your products or services.

Sharing online material in videos, blogs, podcasts and social media posts can help convey the story and values of your brand and attract an audience.

The content could range from advice and problem solving to recipes and tutorials.

Content marketing focuses on the material, rather than the brand.

→

Collaboration

Marketplaces like *Otto* use content marketing and partner with other media who are looking for well curated content.

Find an influencer

People who have the most influence over your potential buyers could help tell your brand story.

Online influencers are people who have established a credible voice in an industry and have a large audience of followers on social media platforms.

Product endorsement

Many influencers endorse products online. These bloggers, YouTubers, freelance journalists, celebrities, and thought leaders often test and try products, sharing their views with large audiences.

Suitability

For a New Zealand brand, leveraging the voice of well-connected people in Europe could be an effective way to grow your audience. Look for an influencer who will respect your brand.

Utilise an agency

There are a number of specialised agencies that help to connect influencers with brands; Buzzsumo, Ifluenz, Shoutcart, Tribe, Openinfluence, or Reech, influes.me, Yoo (Paris and London). These also provide companies with data on the most popular influencers and the most shared content.

→

Blogger influence

Caroline Receveur is a French fashion blogger with 2 million followers.

SECTION 3

Make it personal

Make it personal

European shoppers are looking for a tailored, personalised experience online.

Creating a brand that recognises customers as individuals helps to cement loyalty and increase sales. Customers expect good service online – it's important to recognise and respond to their needs without overstepping privacy boundaries.

Customer offers: Through loyalty programs, retailers learn about customers purchases. They can use the information to personalise discounts and offers.

Retargeting: Remind shoppers of items they browsed but didn't purchase. These reminders appear as ads on other websites the shopper visits or are delivered via email.

Push alerts: Send a direct message to customer's mobile phone about products on sale, or products they may also enjoy.

Loyalty offers: Offer special deals to customers who recommend your brand to friends.

Personalised marketing can help:

→ Convert visitors to your online shop into buyers

→ Increase revenue through return customer loyalty

→ Reduce the number of visitors who leave the site without purchasing.

Adaptive communication
When cross-channel communication involves using information that customers have not actively provided, retailers should supply information that is really valuable.

→

Starbucks is doing this well
They use *location information* from customers' mobile phones during the preparation of their order.
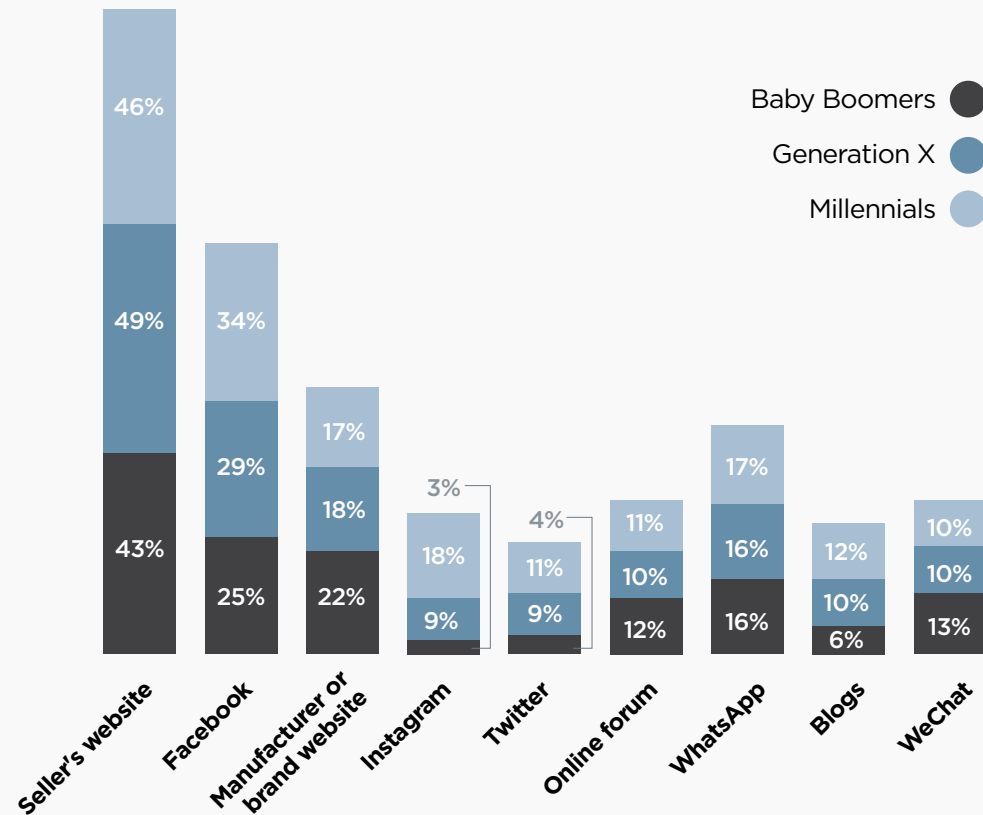
Give customers a voice

Encourage reviews and feedback

European shoppers are keen to add their feedback to products and brands online, ask questions and join conversations – and they prefer to leave comments on the seller's website.

Give them an opportunity to rate your products, share what they liked, and also give you direct feedback throughout their shopping experience.

→ A brand that can provide online forums, chatbots or live chats and web call back features has an advantage.

Most popular websites used by consumers for feedback by generation, 2017.

Baby Boomers ●
Generation X ●
Millennials ●

	Baby Boomers	Generation X	Millennials
Seller's website	43%	49%	46%
Facebook	25%	29%	34%
Manufacturer or brand website	22%	18%	17%
Instagram	9%	18%	3%
Twitter	9%	11%	4%
Online forum	12%	10%	11%
WhatsApp	16%	16%	17%
Blogs	6%	10%	12%
WeChat	13%	10%	10%

Consumer Behaviour: Popular Feedback Websites, Source – KPMG, Global Online Consumer Report 2017

SECTION 4

Harness social media

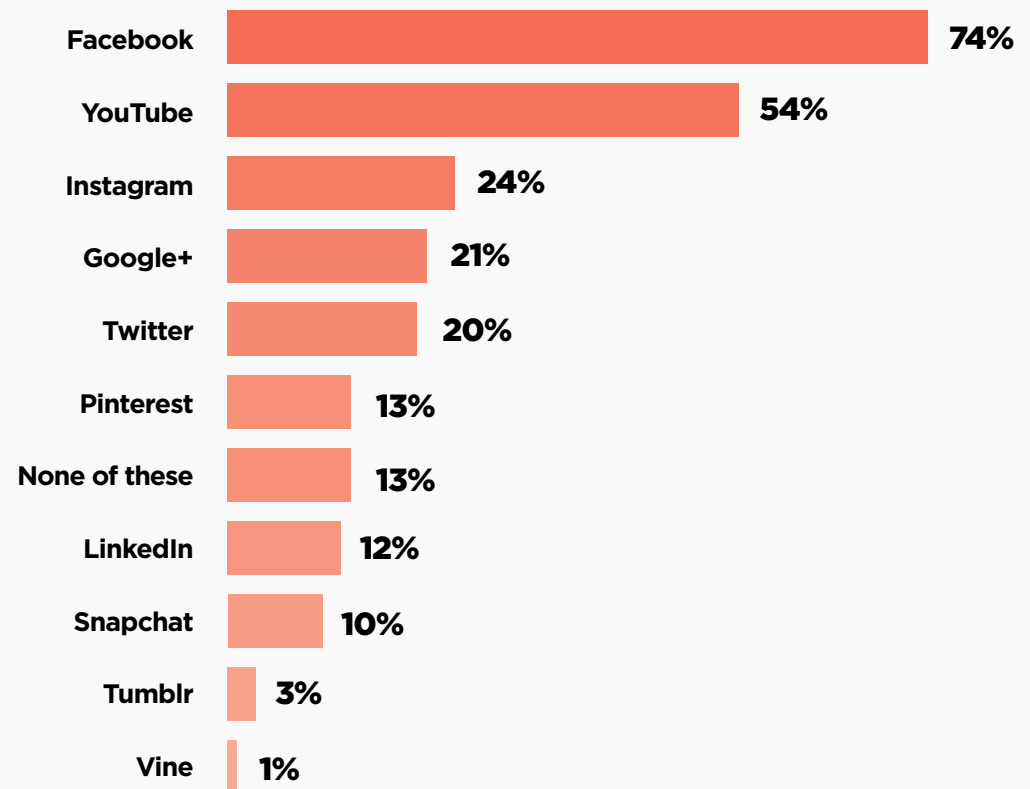# Europeans are savvy social media users

The top three social sites

One of the best ways for your brand to be seen is on social media – Facebook, YouTube and Instagram are the three most popular social media sites in Europe.

Pinpoint your target customer

Brands often call in the experts – many European communications suppliers specialise in social media advertising campaigns, and can help identify which social media platforms your target customers use.

Weekly use of social media across 21 European countries.

Platform	Percentage
Facebook	74%
YouTube	54%
Instagram	24%
Google+	21%
Twitter	20%
Pinterest	13%
None of these	13%
LinkedIn	12%
Snapchat	10%
Tumblr	3%
Vine	1%

Source: DPD e-shopper barometer 2017

Facebook rules in Europe

Facebook is king

A Facebook business page can be used alongside a website, to create focused communities, engage with customers and track consumer behavioral trends.

→ Facebook has 354 million subscribers in Europe and also owns Instagram.

→ Facebook's WhatsApp and Messenger chat apps are used by 1.3 billion people worldwide. WhatsApp is regularly used by 55% of Germans and 17% of the French.

→ You can advertise and host events on Facebook to encourage people from your online community to meet.

354M
No. of Facebook subscribers in Europe

1.3B
No. of Facebook's WhatsApp and Messenger users worldwide

55%
of Germans regularly use WhatsApp

17%
of the French regularly use WhatsApp

YouTube is the place to be seen

Visual content is king on YouTube, where a video can potentially go viral and help establish your brand.

→ When creating videos for YouTube (or Vimeo, also popular in Europe) quality and timing matter. Video and audio should be crisp, clear, and easy to understand, aligned with your overall brand.

→ Brands can set up their own dedicated YouTube channel, linking to their website.

→ Content can include marketing and advertising, and customer generated video content.

→ Google owns YouTube. Publishing a video on the channel can help your brand be found in a Google search.

Advertise on YouTube

→ In-streaming ads

The most common advertisements are short clips before, after and during video streaming. These are called in-streaming ads, which also pop up whenever a video is embedded on pages other than YouTube.

→ Cost per view

You pay for advertising every time a user watches 30 seconds (or shorter, depending on the clip's length) of your clip or whenever they click on your ad to learn see more. (CPV: Cost per View)

→ Discovery ads

There are also discovery ads, which appear when a user is searching or browsing content on YouTube or across the web. These clips aren't limited to 30 seconds; they can be as short or long as you wish. You'll be charged every time someone clicks on the ad to watch the full video. (CPV)

→ Industry gateway

YouTube also gives you a gateway to be an educator in your industry. You can upload webinars or videos speaking about topics that interest your audience.

Birkenstock reach more of their target audience by producing online product tutorials and videos. This can enable consumers to engage with the brand or product in more detail without the need to visit a physical store.

Instagram is the millennials favourite
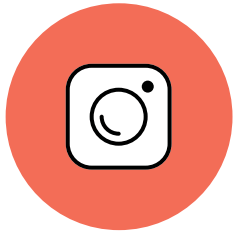
Instagram is like your shop window online.

It can build your brand's personality, help you attract customers, and promote products and services to a wide audience.

→ **Track followers and how they interact** with your posts and stories.

→ **The favorite social media platform for millennials.**

→ The number of monthly active Instagram users worldwide reached **600 million in December 2016.**

→ **You can advertise in a variety of ways through photos, videos or stories.** Instagram provides a step by step tutorial to help you build your campaign. You get real time metrics on how your stories and promoted posts perform throughout the day.

→ **The Ads Manager feature uses the same powerful advertising tools as Facebook.** You can set up, make changes and see results for all your Instagram campaigns and ads in one place.
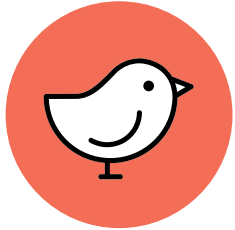
600M
No. of monthly active Instagram users worldwide in December 2016

16M
No. of Starbucks Instagram followers worldwide

Twitter for microblogging

Twitter is your space for posting short messages, tweets, and joining a conversation about your brand and industry.

→ Twitter has 330 million registered users.

→ Brands can also advertise through sponsored links.

→ Hashtags # are your key on Twitter, as they allow you to reach a wider audience than just your followers.

→ Twitter users can follow anyone else on the platform, including celebrities and people they may not otherwise talk to.
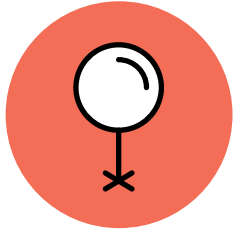
→

Increase brand followers
Adidas has been on Twitter since 2011 and has nearly 3.5 million followers.

330M
No. of registered users on Twitter

3.5M
No. of Adidas followers on Twitter since 2011

Pinterest is for the creatives

A digital mood board

Pinterest is like an online mood board for sharing ideas, and in Europe large online marketplaces use this social network to position themselves as lifestyle, fashion and design brands.

→ Pinterest has 200 million visitors each month, of which 70% are women.

→ It has business solutions to help companies improve brand awareness, increase website traffic and boost online sales.

→ Trendsetters and influencers use Pinterest to share what they like and profile themselves.

→

Blogger Influence

Blogger *Joy Cho/Oh Joy!* has a community of over 13 Million followers.

13M

No. of followers of Joy Cho/Oh Joy on Pinterest
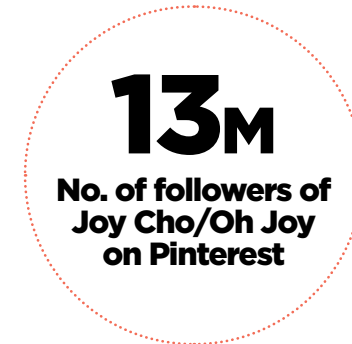
Google+ and Google My Business

Businesses use Google+ to optimise their brand's profile in search results.

Europe B2B companies use Google+ actively, but for a different purpose than social media.

A Google+ page is another way to promote your brand in Google search results.

Google My Business

The Google My Business dashboard is where you can build your business page on Google, update your business listing, add photos, and share content that makes your page more valuable. All of that information is pulled directly into Google's business listing for brand searches.

Google My Business has become a robust business listing in its own right, offering built-in analytics, and the ability for users to chat with your business directly from your listing.

26.3%
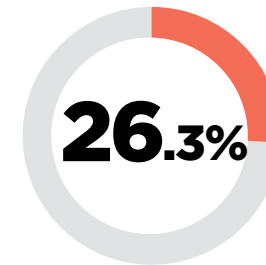
Percentage of Google+ female users

73.7%
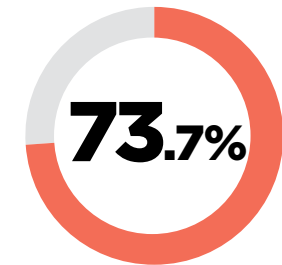
Percentage of Google+ male users

Top 5 countries
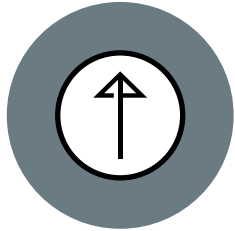
1. USA
2. India
3. Brazil
4. UK
5. Canada

Top 5 brands

1. Google Chrome
   12.3M followers
2. Andriod
   11.9M followers
3. Playstation
   9.3M followers
4. Google Play
   9.1M followers
5. Gmail
   9M followers

Source – GMI Nov 2017

The rise of social commerce

The rise of social commerce

Browsing online needs to be easy, and an important part of the shopping experience you offer.

Nearly half of online shoppers in Europe use social media to look for a product or service – but this number jumps to 67% for shoppers aged 18-24. The number of buyers and browsers have tripled over the past two years.

→ Consider embedding commerce directly in your social channel.

Facebook has partnered with Shopify to enable businesses to set up a Facebook e-shop. With a Facebook store, you can sell directly from your Facebook page, manage orders, and run an ad. You can personalise the shopping experience with Messenger chat support, allowing customers to buy your products directly in a chat, and track their orders in real time.

Twitter has teamed up with a number of e-commerce partners to allow users to sell directly from its platform. Any product that you've tweeted will include a buy button, which means your audience can buy from you without leaving Twitter.

On Pinterest, buyable pins were released in 2015. At the time, there were 30 million on the site, and within three months the number had doubled.
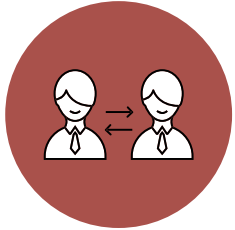
50% → **67%**
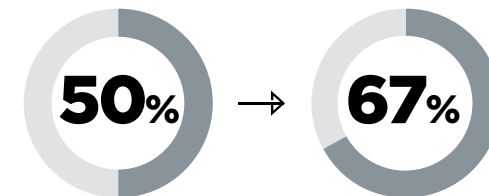
Of online shoppers in Europe use social media to look for a product or service

Jumps to 67% for shoppers aged 18-24

How B2B companies use social media

How B2B companies use social media

In Europe, B2B companies use social media to promote thought leadership, strengthen customer relationships and attract talent.

Desired B2B platforms

In Europe, the most popular platforms for B2B are You Tube, Google+, Twitter, LinkedIn, Viadeo (mainly in France) and Xing (mainly in Germany, Switzerland and Austria).

LinkedIn

LinkedIn has developed a number of tools for business accounts. It has become a top hiring platform in Europe used by HR specialists, headhunters and candidates.

LinkedIn also offers marketing solutions and advertising options, including video ads. It provides tools to monitor traffic.

→

Example: Hager Group
A leading supplier for innovative electrotechnical components and solutions, *Hager Group*:

→ is active on 7 social media platforms for brand awareness and employer branding;

→ has its own social media charter for employees;

→ also leverages social media to support talent recruitment.

Monitoring performance

Monitoring performance

The advantage of an online shop is it's possible to keep track of sales and trends so you can adjust the shopping experience for your customers.

Almost everything can be measured instantly in an online shop – from the number of sales and conversion rates to the impact of an ad campaign on sales.

It's important to start out as you mean to go on, using a digital strategy and specific key performance indicators (KPIs) as a roadmap.

Measure performance on the fly

The success of your online shop depends on a number of factors that help lead browsers to the checkout.

1 Good design and well thought out e-marketing campaigns. Be willing to adapt.

2 Attracting and nurturing a community of fans will help foster brand advocacy from loyal customers.

3 Data and advanced analytics play a crucial role in understanding shopper behaviour, and qualitative listening tools are also critical.

4 Engage regularly with shopper panels, ethnographic research and observation can offer valuable feedback on the impact of personalised communications.

5 Many start-ups have developed online surveying and monitoring tools and apps.

6 Google, Facebook, and all the professional e-commerce software have their own web based analytical dashboards that enable you to track your e-shop's performance.

# Keep track of customer churn rate

Consumers can abandon their cart for a number of reasons, sometimes because the path to purchase is too complex.

→ E-commerce statistics show that only half of 100 e-shop visits go to a product page, and 15% will place products in the basket, then 3% will finalise the order.

→ Between the order and the payment, 80% pull out.

→ A fast and reassuring purchase path is essential.

50% → **15%** → **3%**

Of e-shop visits go to product page

Will place an products in the basket

Will finalise the order

80%

Pull out between the order and the payment

28
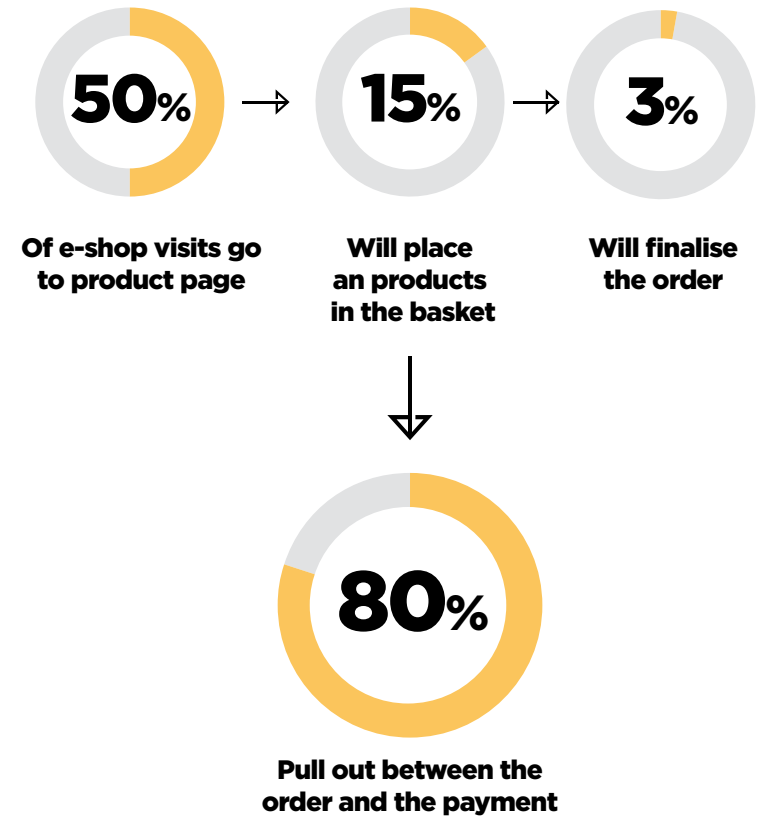
The metrics explained

Conversion Rate (CR)

The percentage of your site's visitors who make a purchase. To calculate CR take your total number of site visitors who make a purchase and divide by the total number of site visitors. An average conversion rate across industries is about 3%.

To improve your conversion rate, make it easier for customers to find what they're looking for.

Average Order Value (AOV)

The average amount a customer spends when they place an order on your site. To calculate AOV divide the total value of orders by the number of orders.

To improve the average amount a customer spends, examine your customers' shopping behaviour and find ways to offer them more relevant products and specials.

Repeat Customer Rate (RCR)

The percentage of customers who return to make another purchase on your site. To calculate the RCR, divide the total new customers in a given timeframe by the number who return for another purchase.

To improve the number of customers who make return purchases, provide great customer service, use email lists and newsletters to send relevant and timely personal content and offers.

Website Traffic

The number of visitors to your website or online shop, and the number of pages visited. Calculate this by adding up all visitors to your site from every source including referral, organic, direct, social, and email. Google Analytics is offering metrics dashboards on a number of variables.

To improve website traffic harness free sources of visitors, such as search results, social media traffic, PR, content marketing, word of mouth, and emails to existing customers.

Customer Lifetime Value (CLTV)

A prediction of the profit you expect to receive from a customer over the course of your entire relationship. By knowing how much each customer is worth to your business, you can better decide what and where to invest in the business.

To stay profitable, it's important that your upfront customer acquisition expenses do not exceed your customer lifetime value.

Get the right skills

Get the right skills

Deciding when to use external expertise or develop the right skills internally will help your online shop succeed.

Outsourcing

You may count on a number of specialised suppliers, from digital strategy advisers and web designers to change management consultants.

Keeping it in-house

When it comes to the day-to-day running of an online shop, you will need key skills in-house.

Your e-commerce adventure can be a great opportunity to develop new skills with your staff, to build capacity and digital know-how and to improve working methods or processes.

SECTION 9

Summary

Reflective questions

1. Do you have a marketing and communication strategy that can promote your e-shop?

2. Do you know which e-marketing tools and methods will best suit your e-business?

3. How can you best leverage the power of social media to support your business?

4. Are you ready to implement social commerce?

5. Could you apply influencer marketing methods?

6. How can you best personalise the customer relationship?

7. Which e-marketing features can you embed in your e-shop?

8. How can you best collect and use customer feedback?

9. Do you have the right competencies in-house to market and develop your e-shop?

10. Which metrics could you use to measure your e-shop performance?

Index of document links

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The New Zealand FernMark licence programme - http://www.fernmark.nzstory.govt.nz/

New Zealand Story Group – https://www.nzstory.govt.nz

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Otto – https://www.otto.de/

Pg 8

Caroline Receveur – http://www.carolinereceveurandco.com

Pg 10

Starbucks location information – https://www.forbes.com/sites/michelleevans1/2017/05/10/what-other-commerce-players-can-learn-from-starbucks-mobile-rise/2/#2e921dc70e51

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Birkenstock – https://www.youtube.com/channel/UCsDtI51c5Ieo3GNKDK9v-6A/featured

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Joy Cho/Oh Joy – https://www.pinterest.nz/ohjoy/

Pg 24

Hager Group – https://www.hagergroup.com/en/media/1024-160.htm#socialmedia

New Zealand Trade and Enterprise (NZTE) is the Government agency charged with a single purpose: growing companies internationally, bigger, better and faster, for the benefit of New Zealand.

We employ 600 people, have over 200 private sector partners and draw on a global network of thousands more. We have people based in 50 offices, working across 24 time zones and 40 languages to support New Zealand businesses in over 100 countries. Our global presence lets us deliver value to the businesses we support, through our unique know-how (knowledge and experience) and know-who (networks and connections).

Our know-how and know-who is expressed in our Māori name: Te Taurapa Tūhono. Te Taurapa is the stern post of a traditional Māori waka, which records valuable knowledge, and stabilises and guides the craft forward. Tūhono represents connections to people and an ability to build relationships.

We provide customised services and support to ambitious businesses looking to go global. We help them build their capability, boost their global reach, connect to other businesses and invest in their growth. We also connect international investors with opportunities in New Zealand through a global network of investment advisors.

We call on our Government network and work closely with our NZ Inc partners and the business community, to grow our national brand and help businesses to open doors in global markets.

nzte.govt.nz

June 2018