

OMR Masterclass

GLOBAL E-COMMERCE INSIGHTS 2018

JOCHEN KRISCH & SVEN RITTAU

AGENDA

- I) It's happening...
- II) Amazon is spooky but...
- III) Multiple ways to retail success!

I) It's happening...

AMAZON

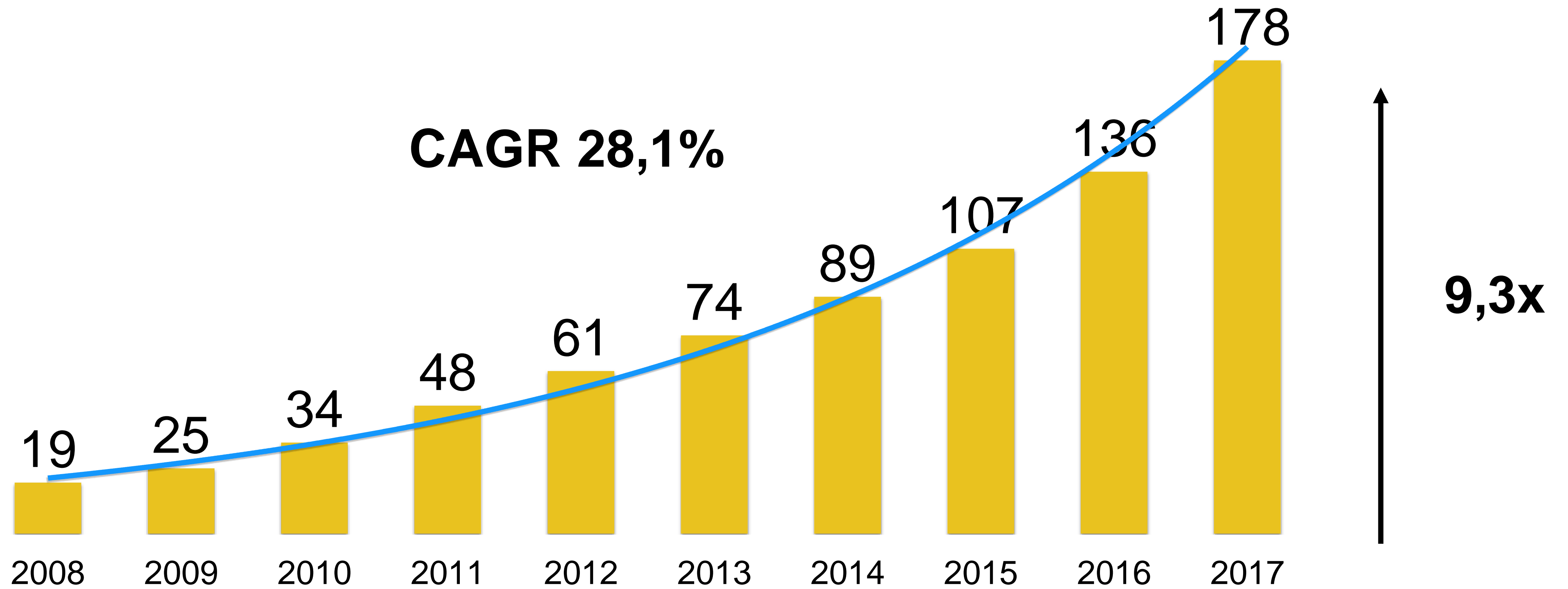
„It's still day 1!“



amazon

AMAZON

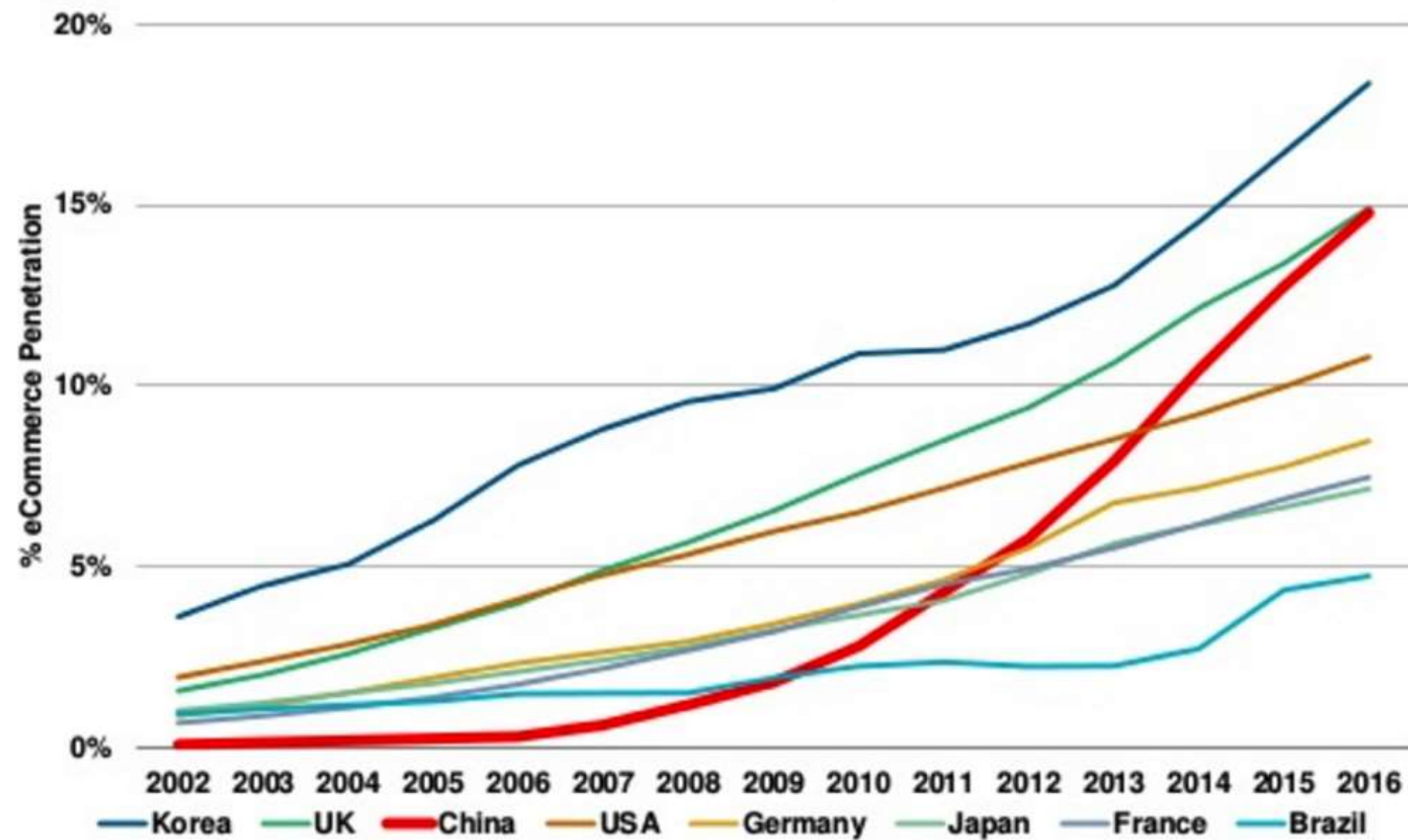
Net Revenues
bn USD



Quelle: excitingcommerce.de

China B2C eCommerce @ 15% of Retail Sales... Penetration Ramping Faster Than Peers

B2C eCommerce as % of Retail Sales by Country,
2002 - 2016



KLEINER
PERKINS

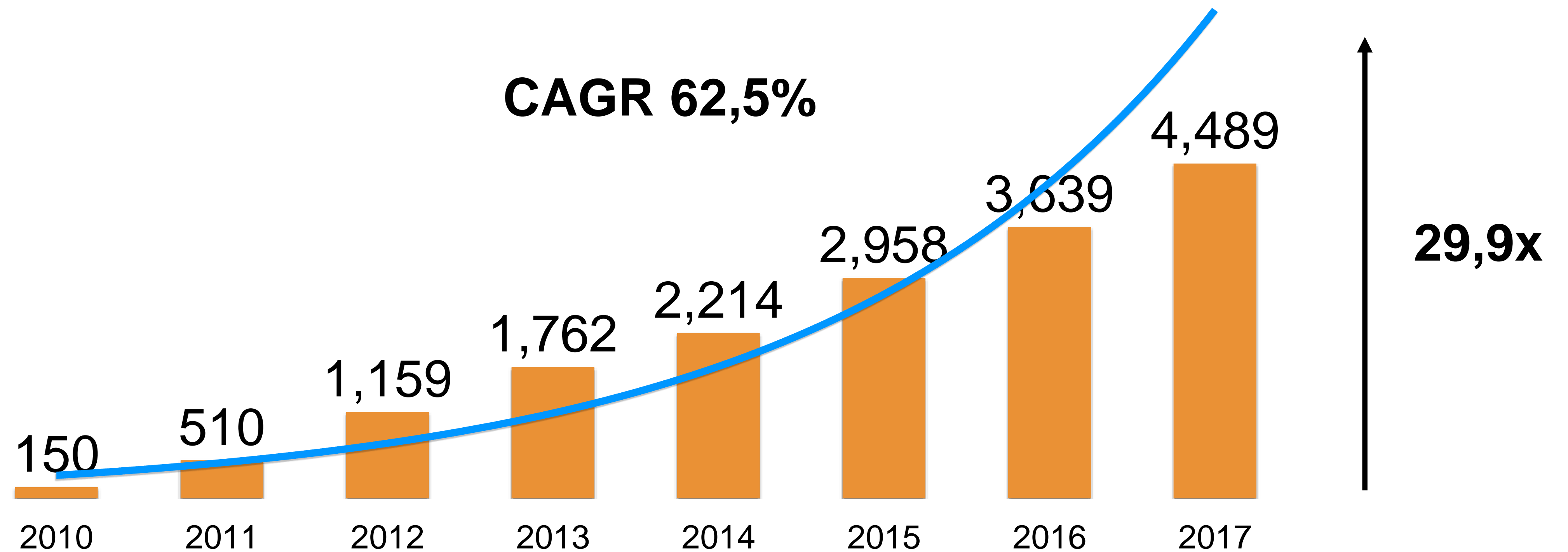
Source: Euromonitor

Hillhouse
Capital

KP INTERNET TRENDS 2017 | PAGE 226

ZALANDO

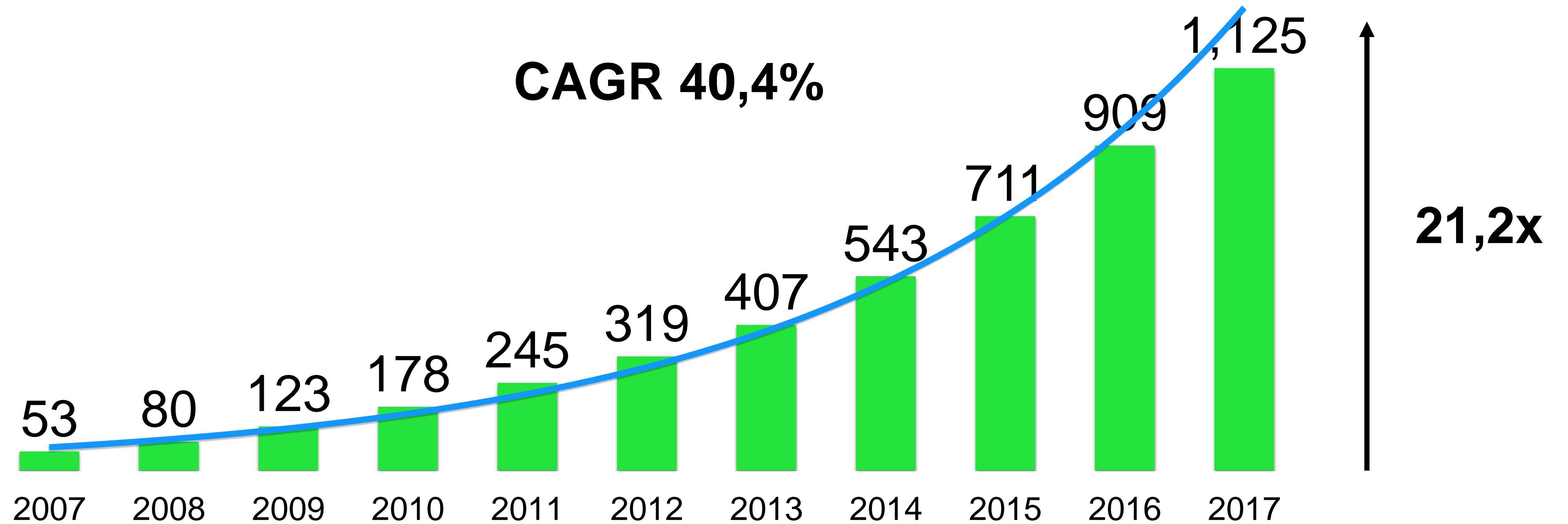
Net Revenues
m EUR



Quelle: excitingcommerce.de

ZOOPLUS

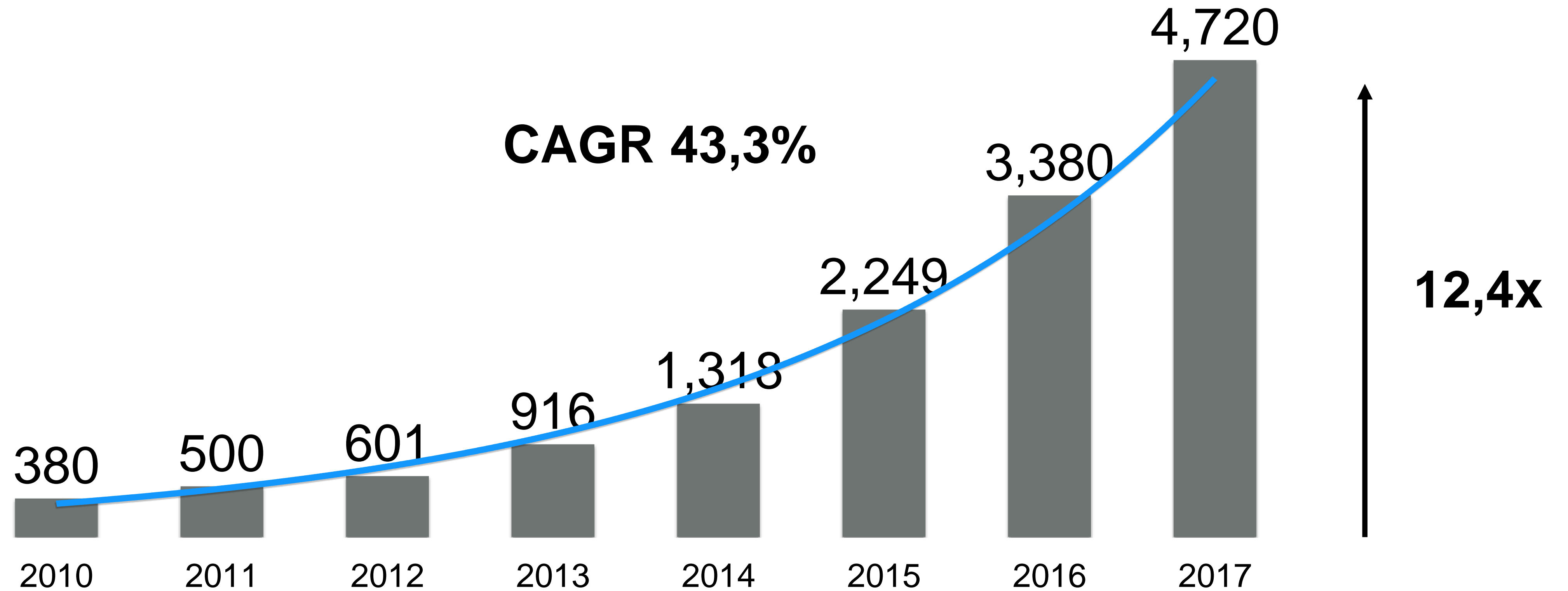
Net Revenues
m EUR



Quelle: excitingcommerce.de

WAYFAIR

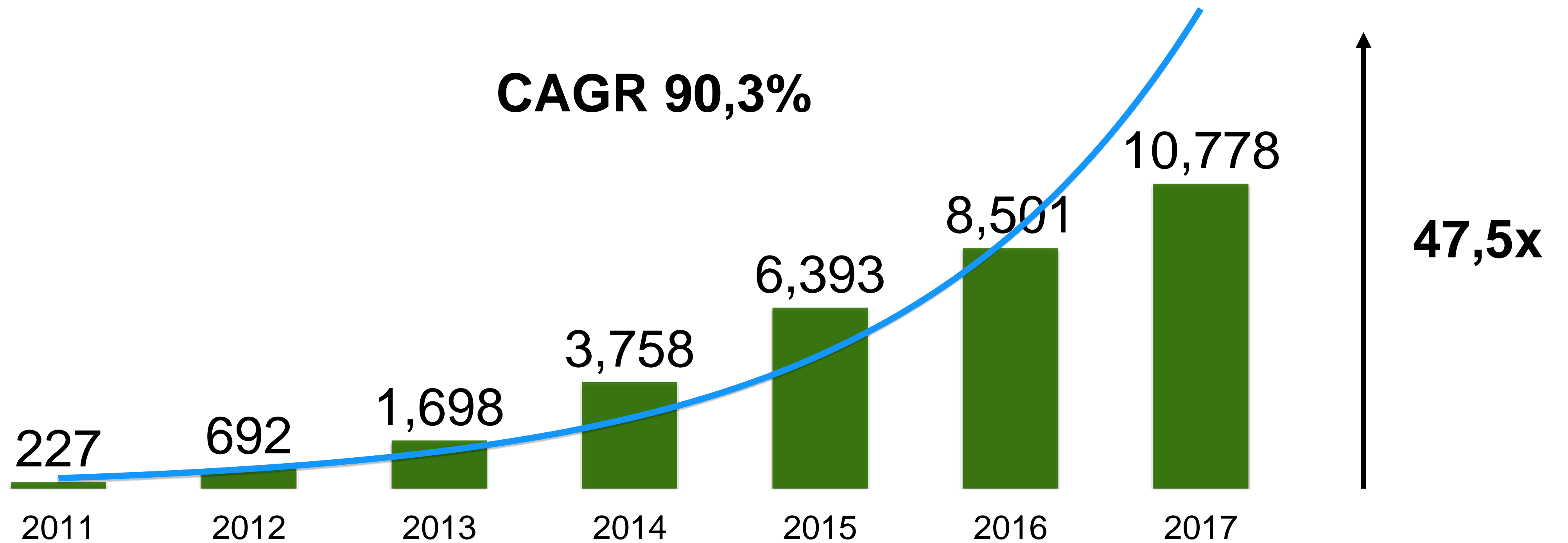
Net Revenues
m USD



Quelle: excitingcommerce.de

VIPShop

Net Revenues
m USD



Quelle: excitingcommerce.de

GLORE25: THE GLOBAL ONLINE RETAIL FUND

➔ Only public e-commerce companies with a +20% growth rate



➔ Category leaders



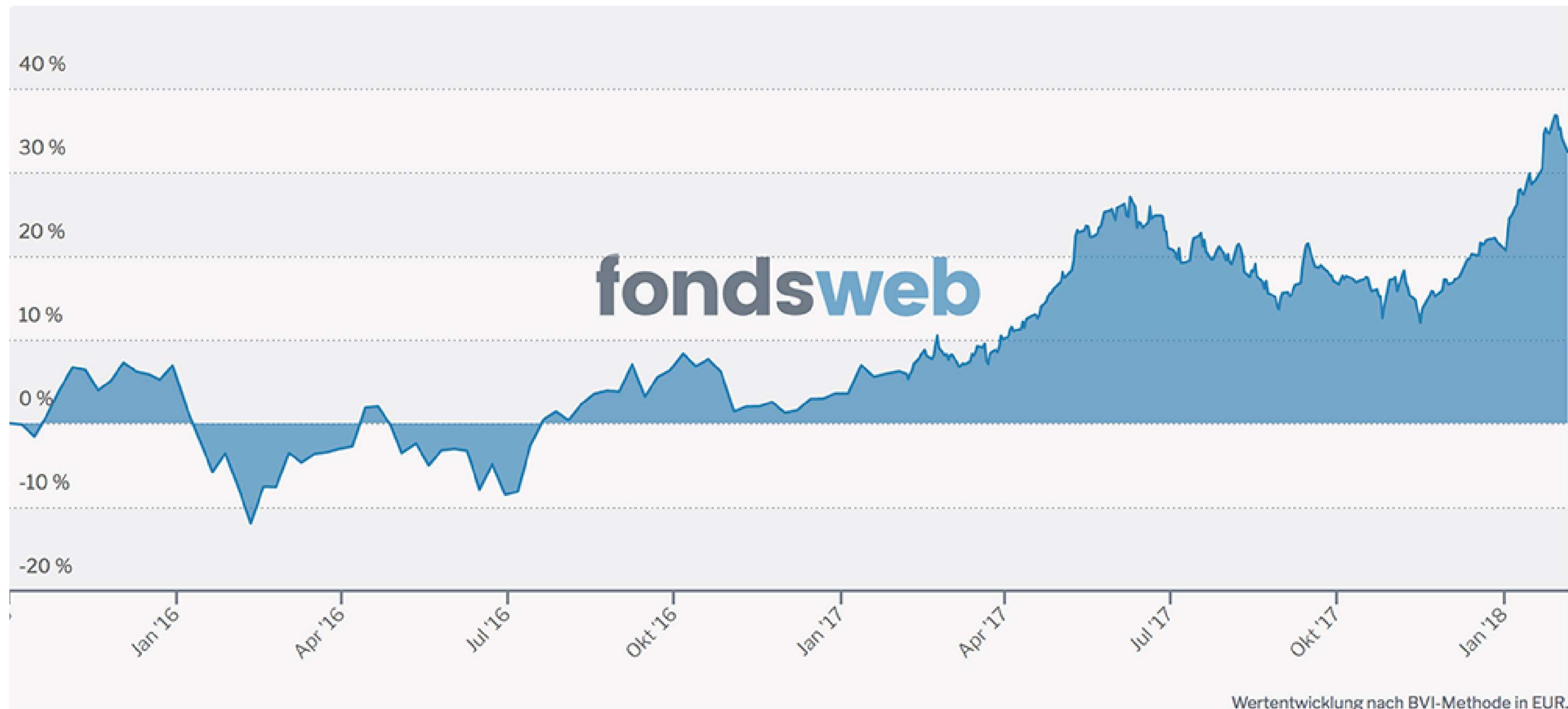
➔ Ideally founders-led



➔ Plus: selective e-commerce holdings



GLORE25: #A14N9A

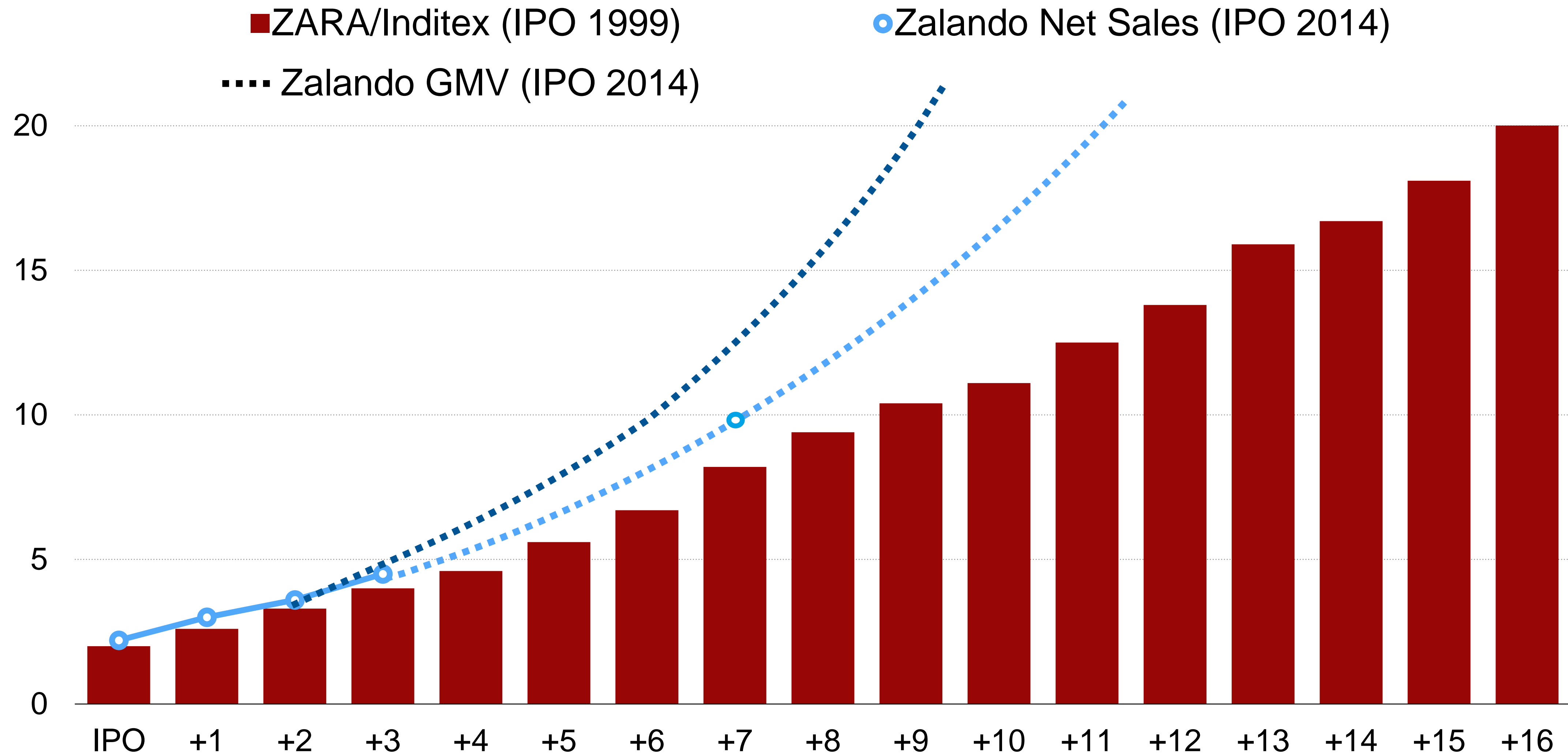


II) Amazon is spooky but ...

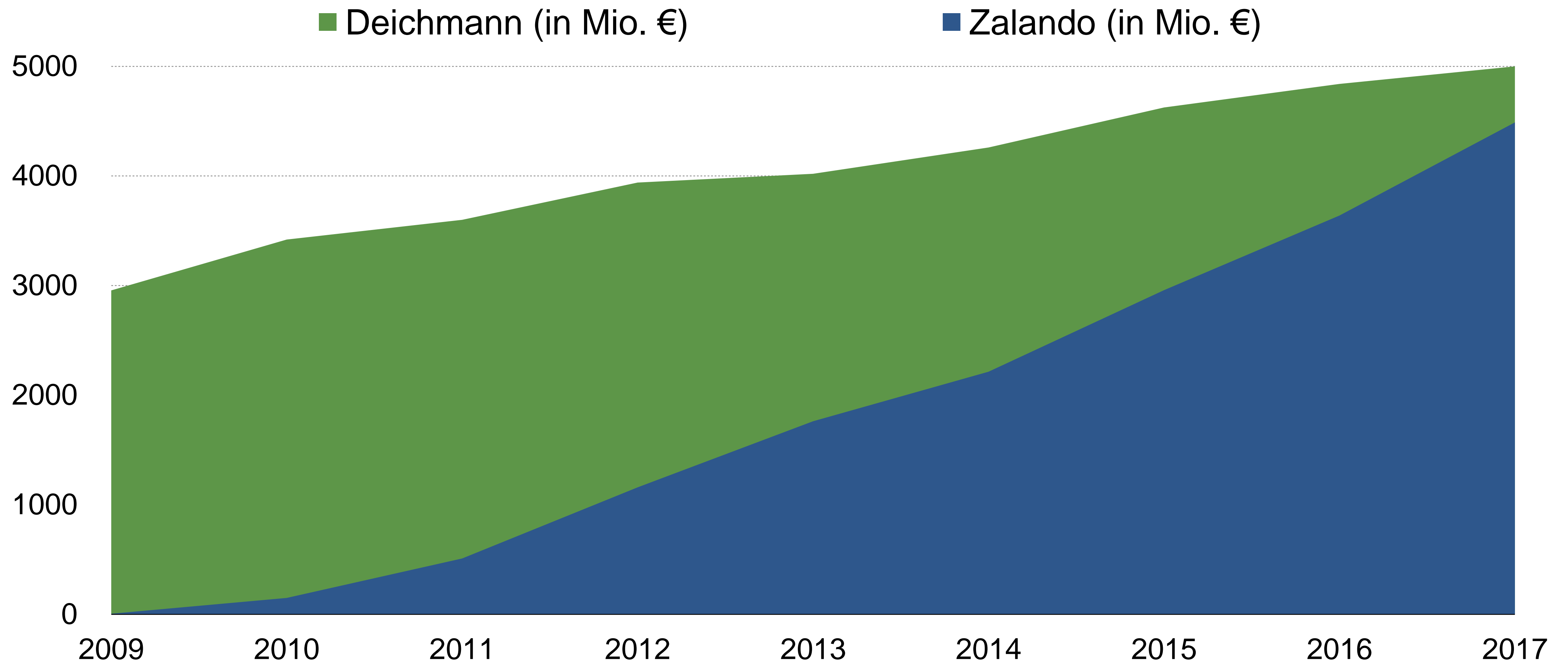


The K5 Mantra

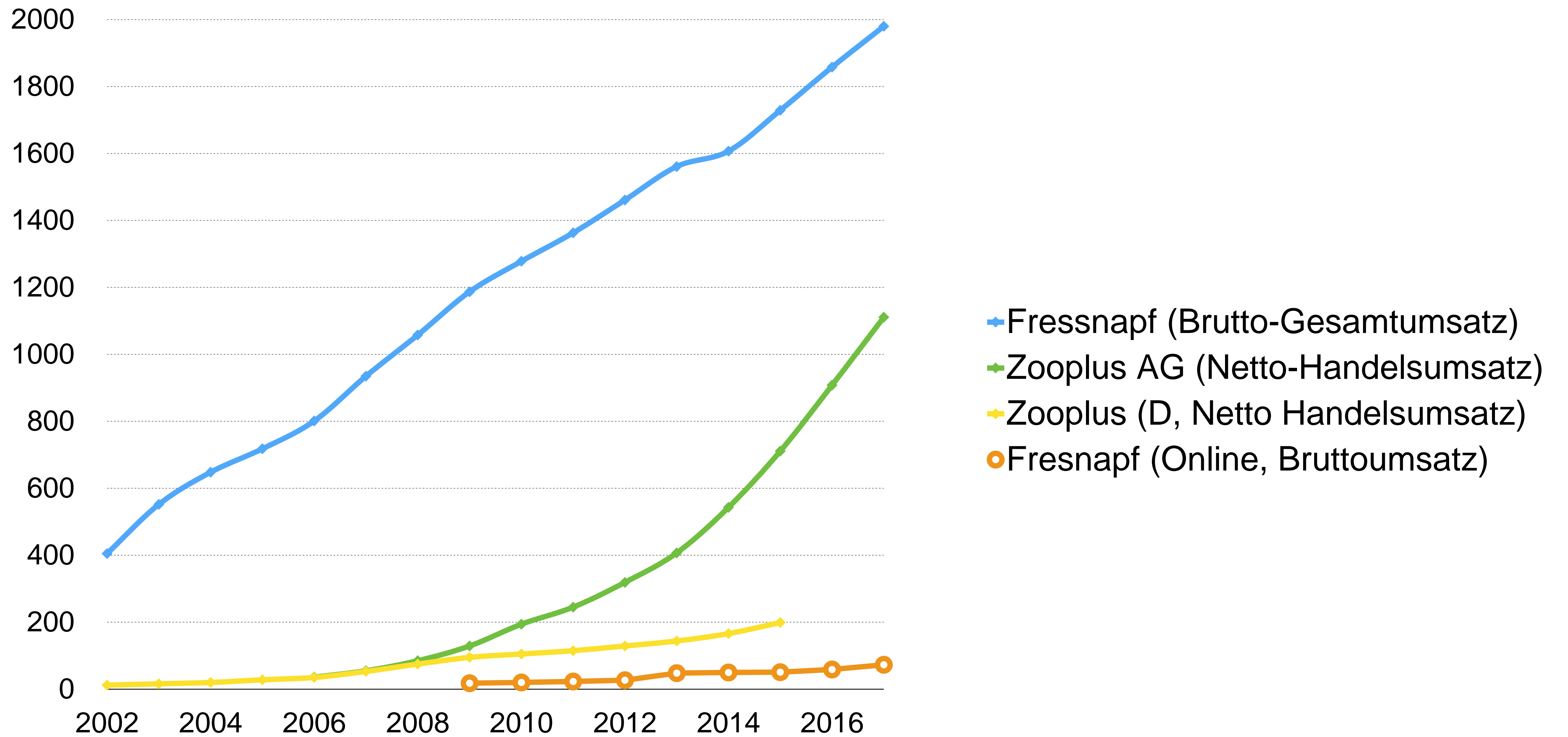
**„You don't have to beat amazon.
Just outperform the old school
offline retail competition!“**



Quelle: excitingcommerce.de



Quelle: excitingcommerce.de



Quelle: excitingcommerce.de

Amazon - a propulsive force beyond retail

RETAIL

**CONSUMER
TECHNOLOGY**

**CLOUD
COMPUTING**

amazon


**LOGISTICS &
DELIVERY**

**MEDIA &
ENTERTAINMENT**

WHAT'S NEXT ???

Amazon is still based on three pillars



amazon Prime

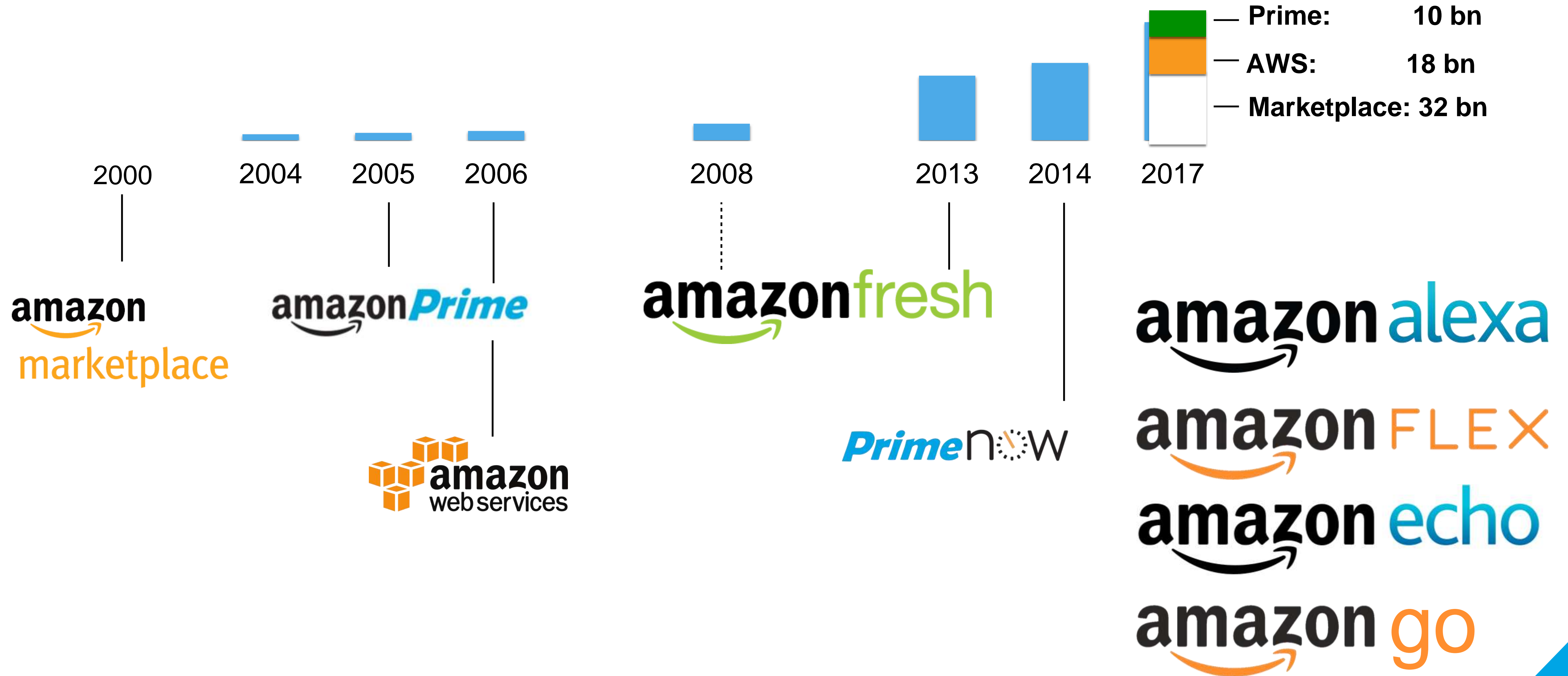


amazon
web services



amazon marketplace

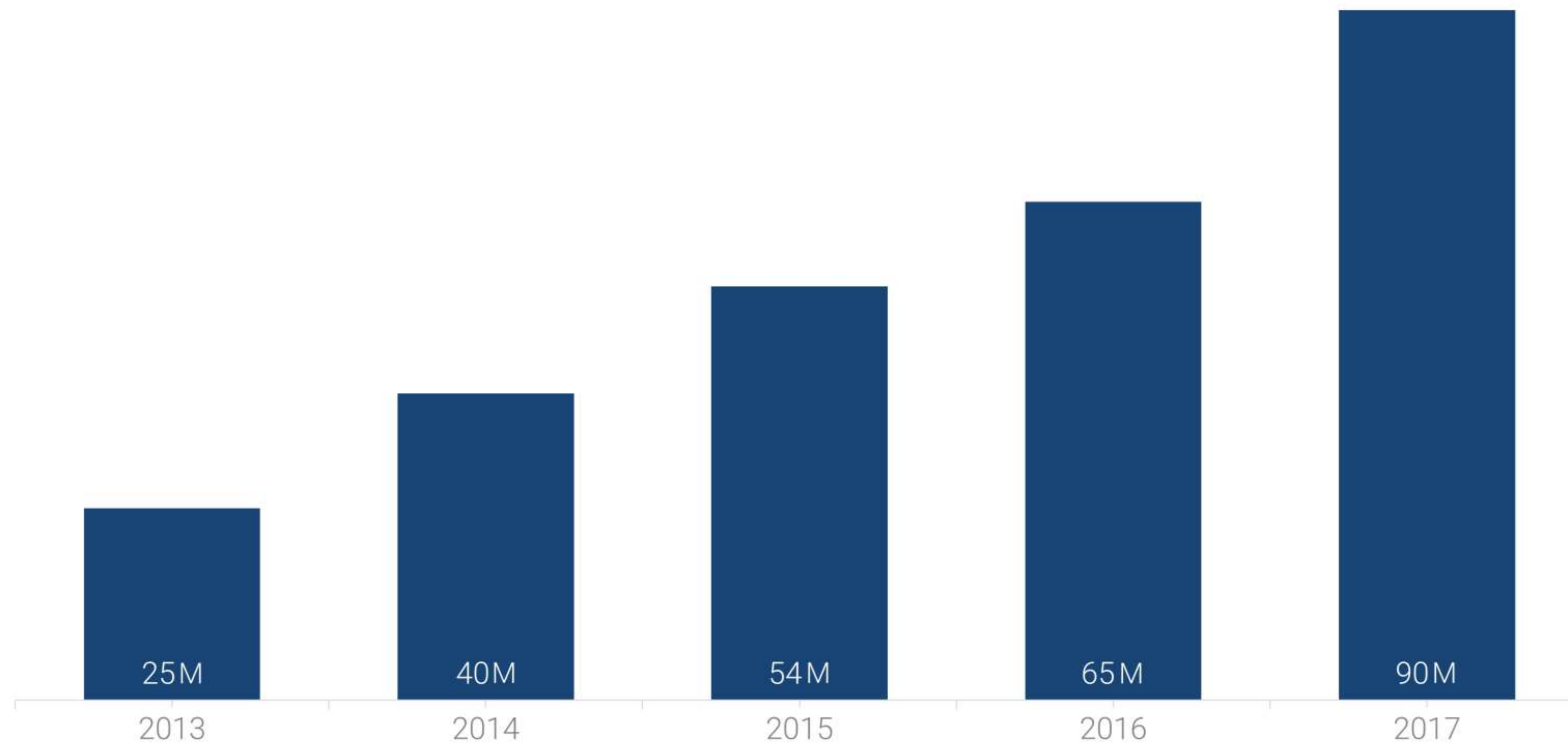
AMAZON





Amazon Prime subscribers double since 2014 to reach 90M

Estimated number of collective Amazon Prime subscribers by year, 2013 - 2017



Source: [Statista](#)



amazonPrime



Free Shipping



Unlimited Photo Storage



Video Streaming



Free Ebooks



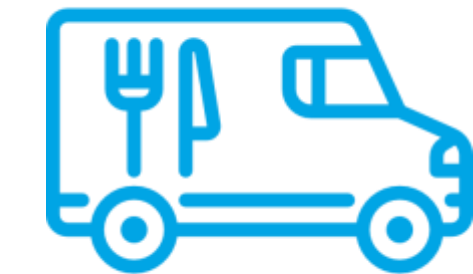
Amazon Music



Free Audiobooks



Discount Whole Foods



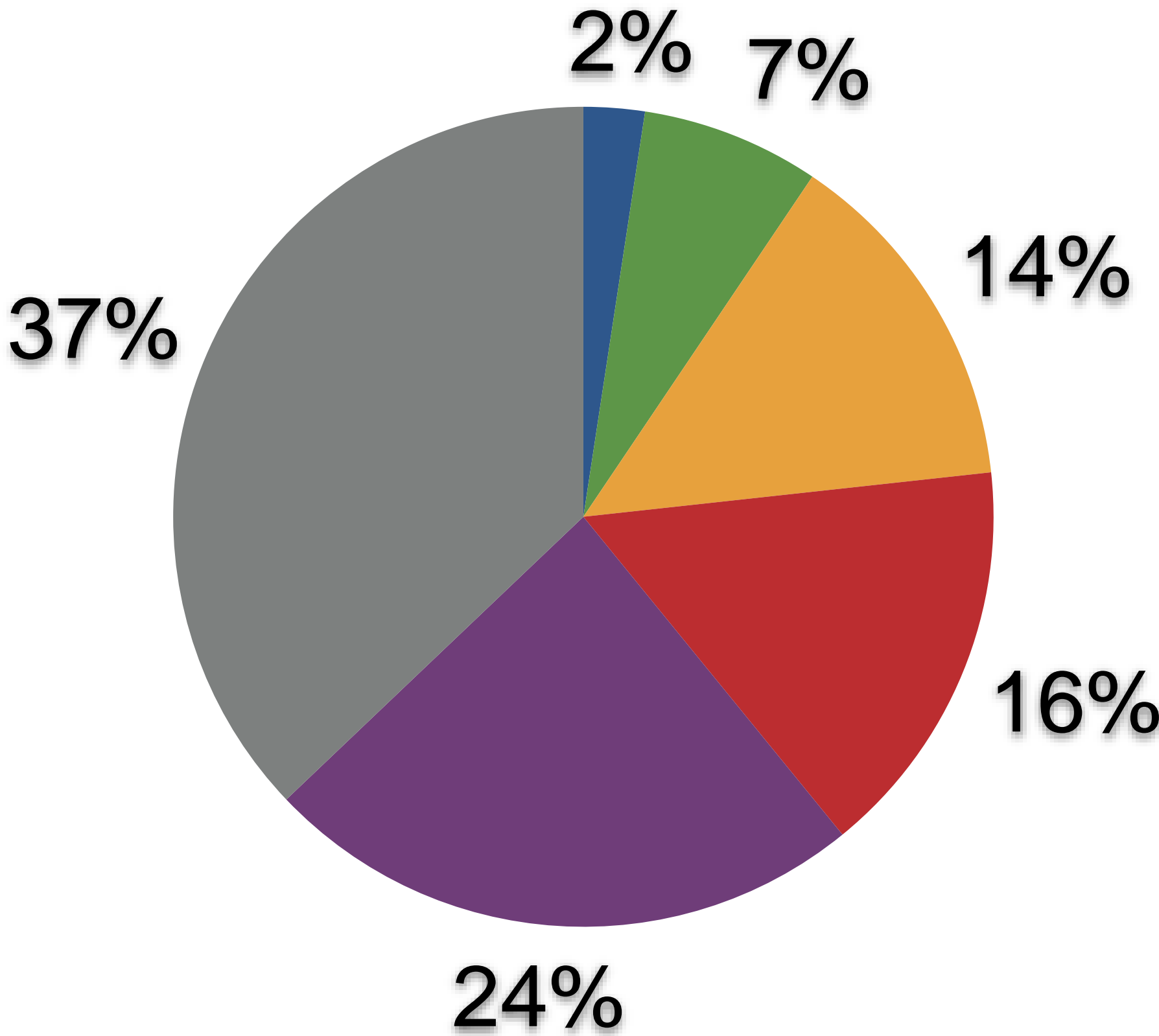
Free Restaurant Delivery



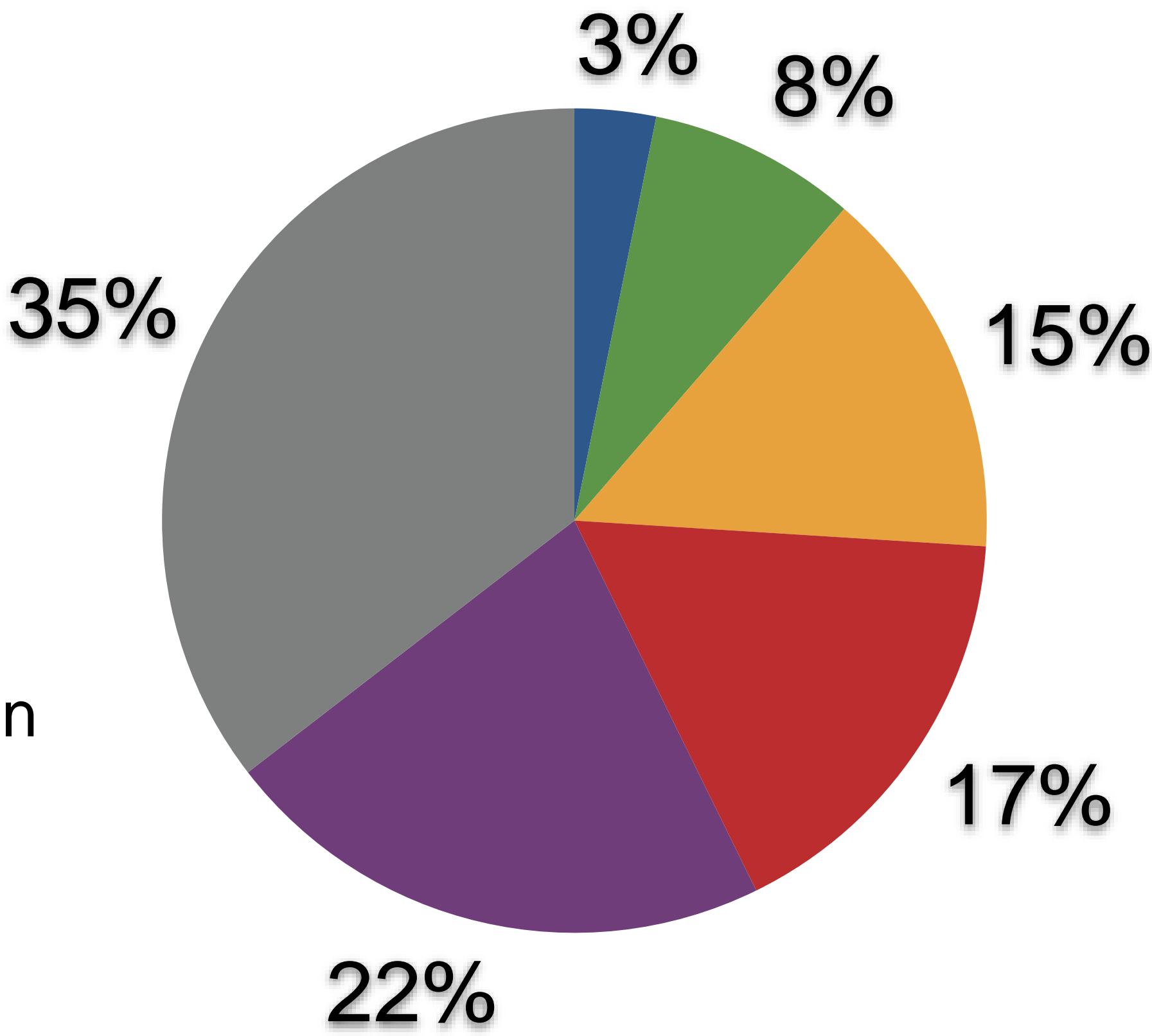
**“Winning a golden globe helps us
sell more shoes and it does that
in a very direct way“**

ACTA Studie

2015



2016



- 50 und mehr Käufe
- 20 bis 49 Käufe
- 10 bis 19 Käufe
- 5 bis 9 Käufe
- 1 bis 4 Käufe
- kaufen nicht online ein

Quelle: ACTA/Allensbach

Keller Sports

KELLER SPORTS

10% Rabatt für 12 Monate - Premium
Mitgliedschaft

9,99 €

Ich bin mit den [AGBs](#) einverstanden.

IN DEN WARENKORB



PREMIUM



PeakPerformance

patagonia

J.LINDBERGB



Faded PeakPerformance

Faded patagonia

Faded J.LINDBERGB



FLEXIBEL TRAINIEREN MIT **KELLER STUDIOS**

ÜBER 1.000 LOCATIONS. BIS ZU 4X TRAINIEREN. AB 29,90 € / MONAT*.

[JETZT ANMELDEN](#)

Es gelten die Allgemeinen Geschäftsbedingungen. Nur als Premium-Mitglied oder mit Abschluss einer Premium-Mitgliedschaft nutzbar.

SO EINFACH **GEHT'S**

III) Multiple ways to retail success!

a) Disruptors



STITCH FIX



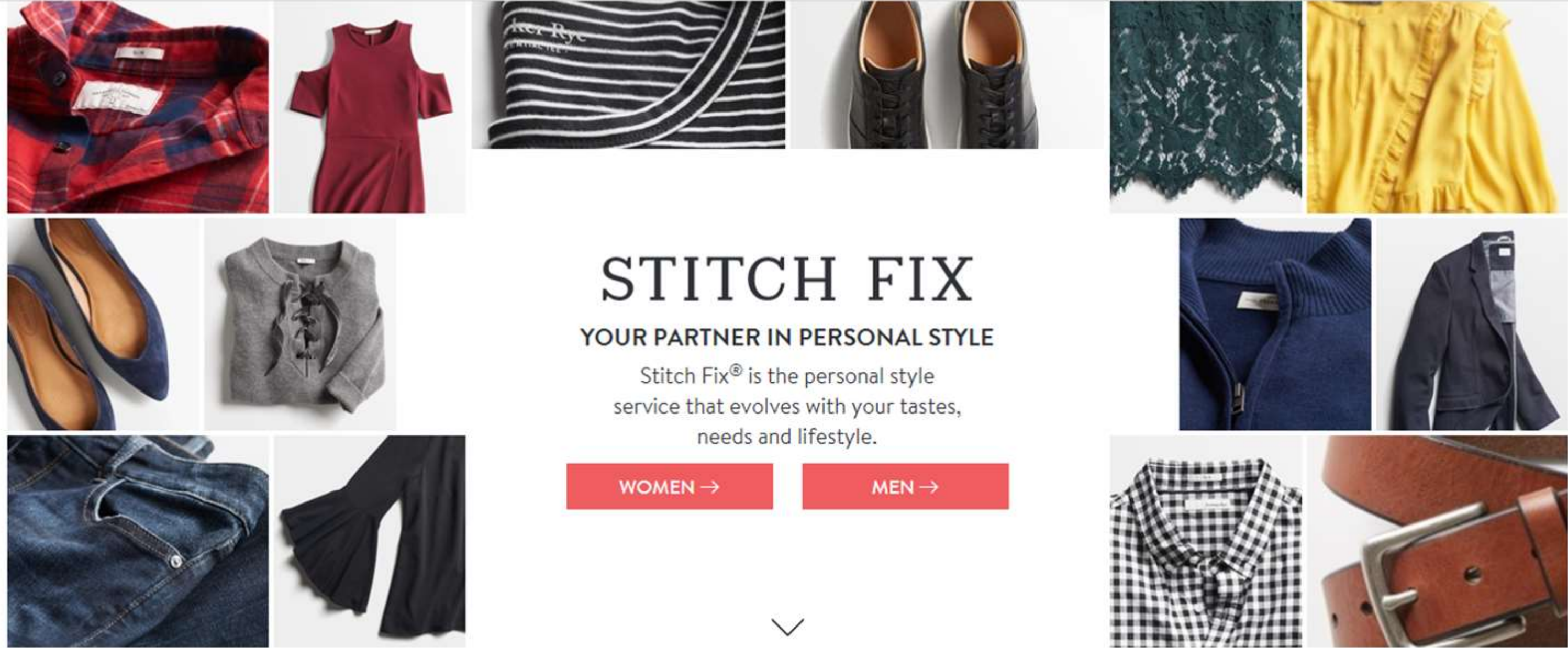
wish



POSHMARK



Glossier.



STITCH FIX

YOUR PARTNER IN PERSONAL STYLE

Stitch Fix® is the personal style service that evolves with your tastes, needs and lifestyle.

WOMEN →

MEN →



How It Works

01

FILL OUT A STYLE PROFILE

Share your style, size and price preferences with your personal stylist.

02

REQUEST A FIX® DELIVERY

Get 5 hand-selected pieces of clothing delivered to your door—no subscription required.

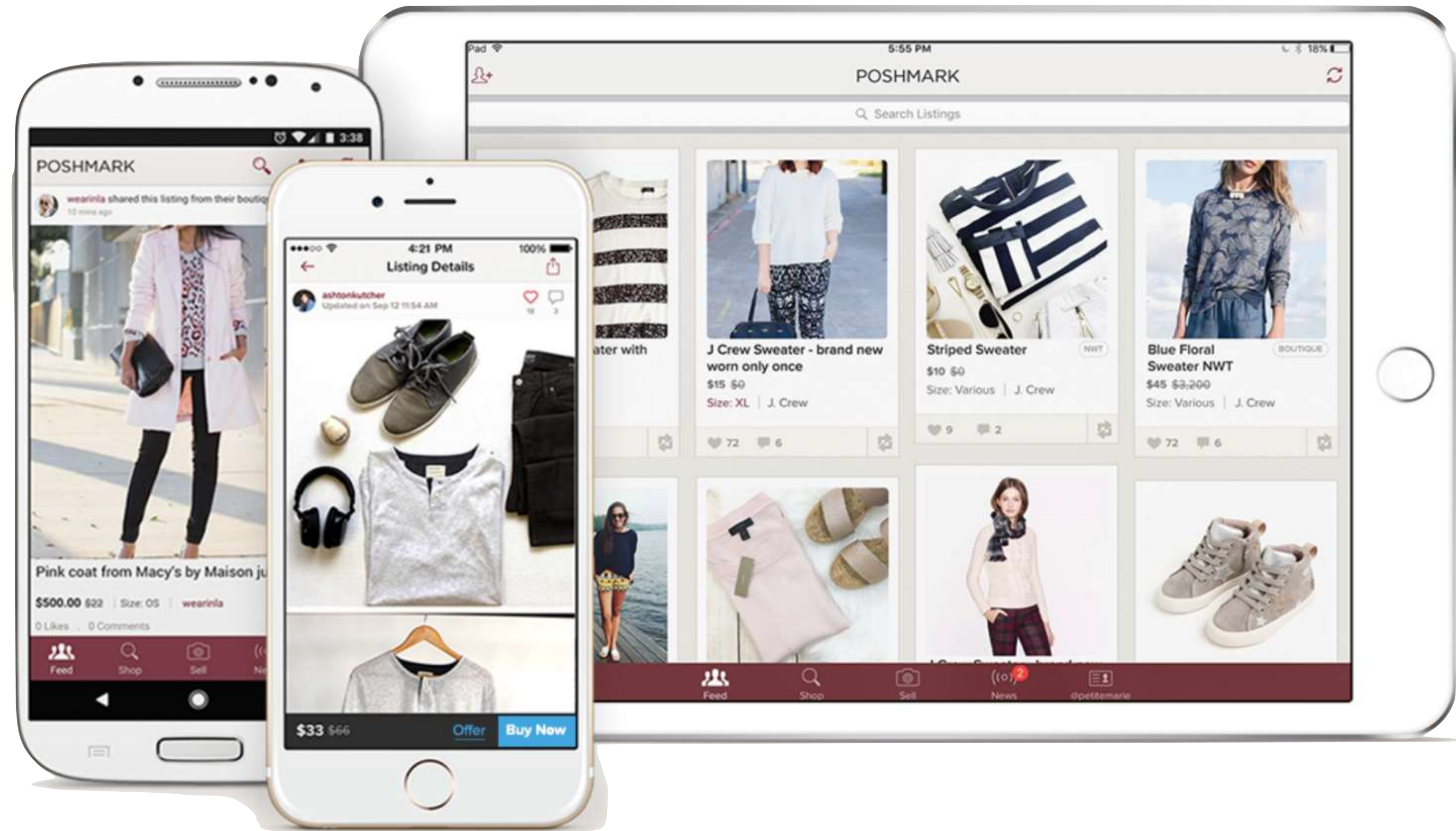
03

KEEP WHAT YOU WANT

Buy what you like, send back the rest. Shipping is free and easy both ways.



POSHMARK





[Our Brands](#)

[Where We Deliver](#)

[Our Experts](#)

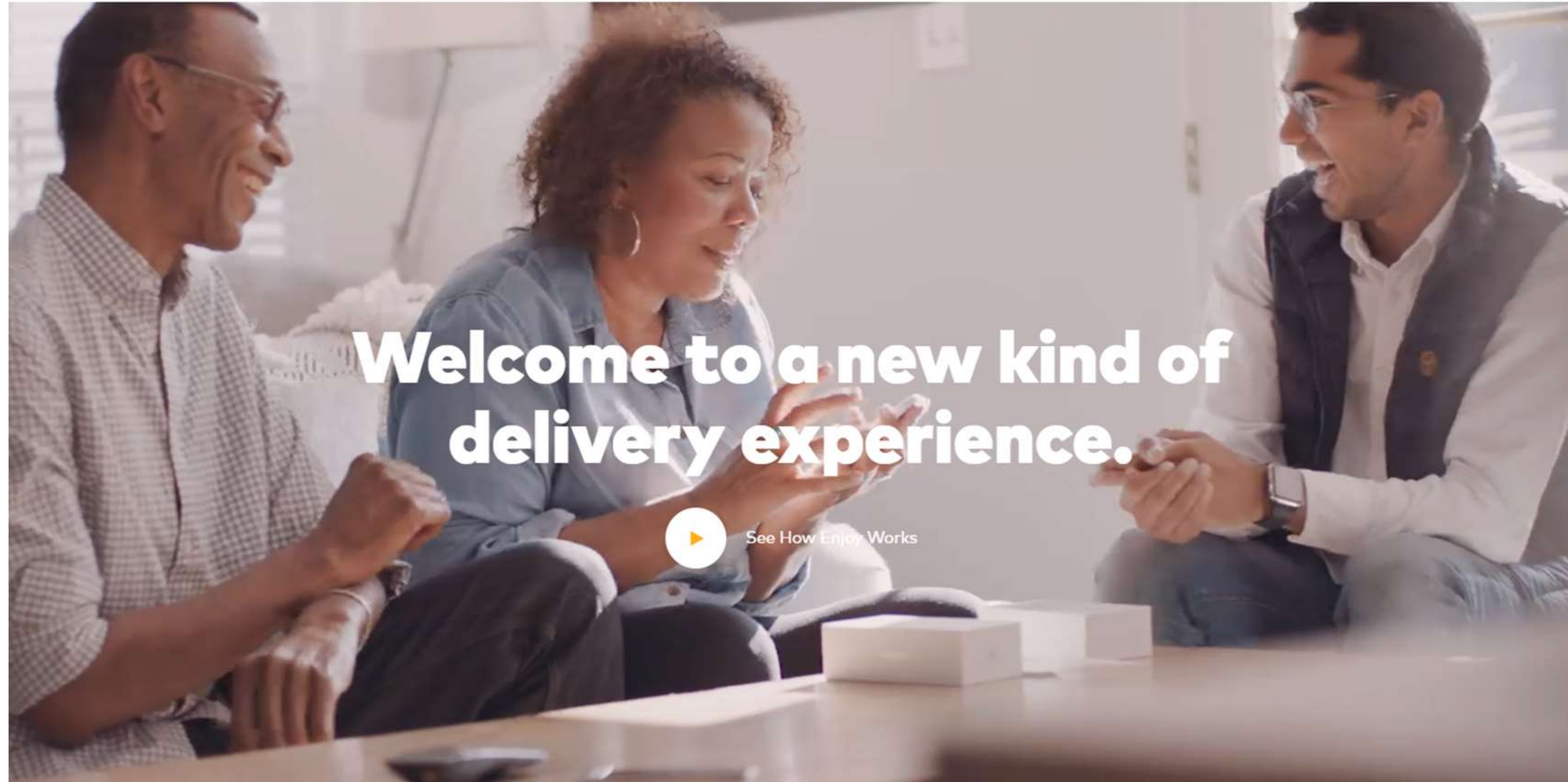
[Testimonials](#)

[Blog](#)

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Welcome to a new kind of delivery experience.

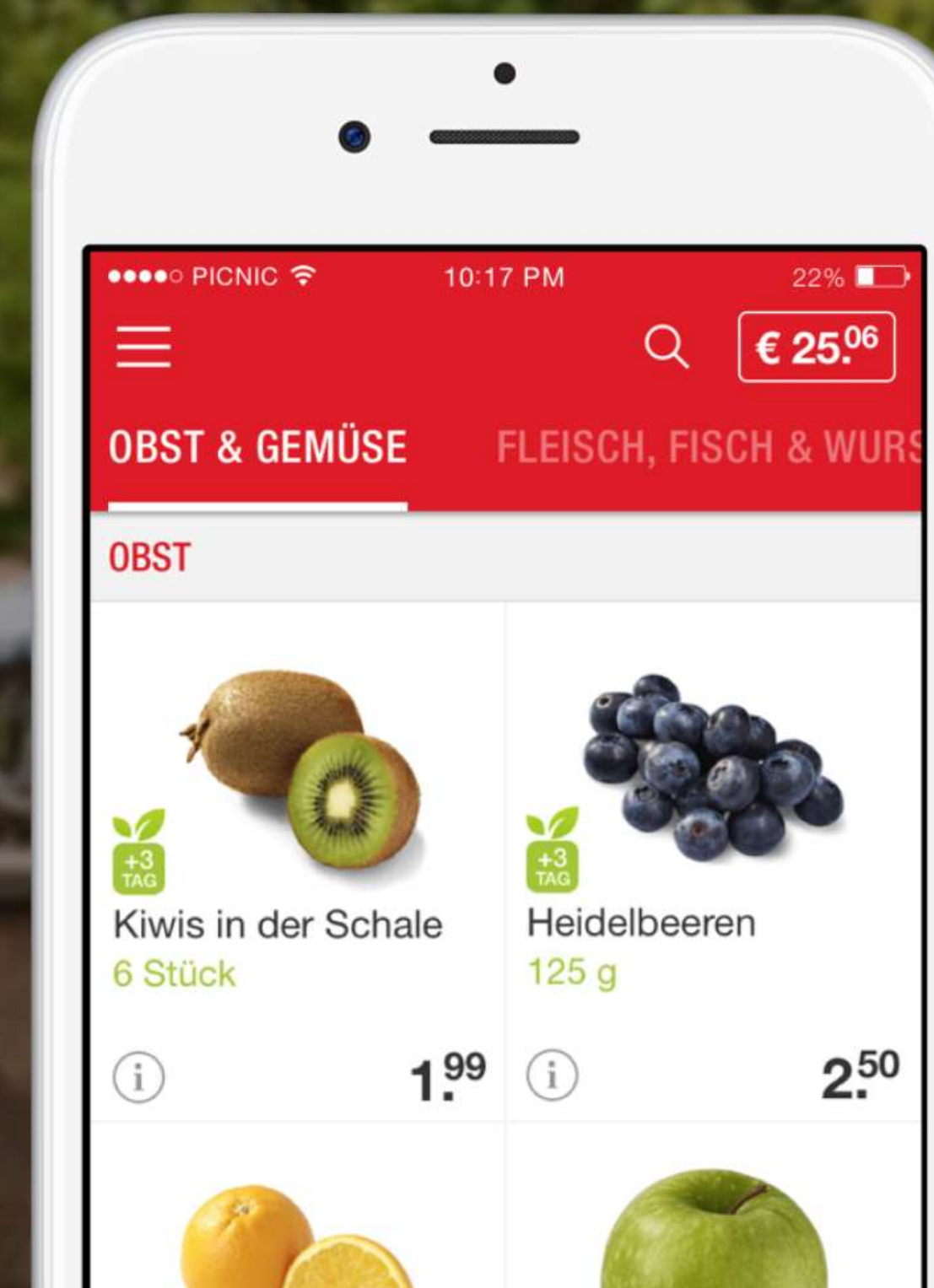


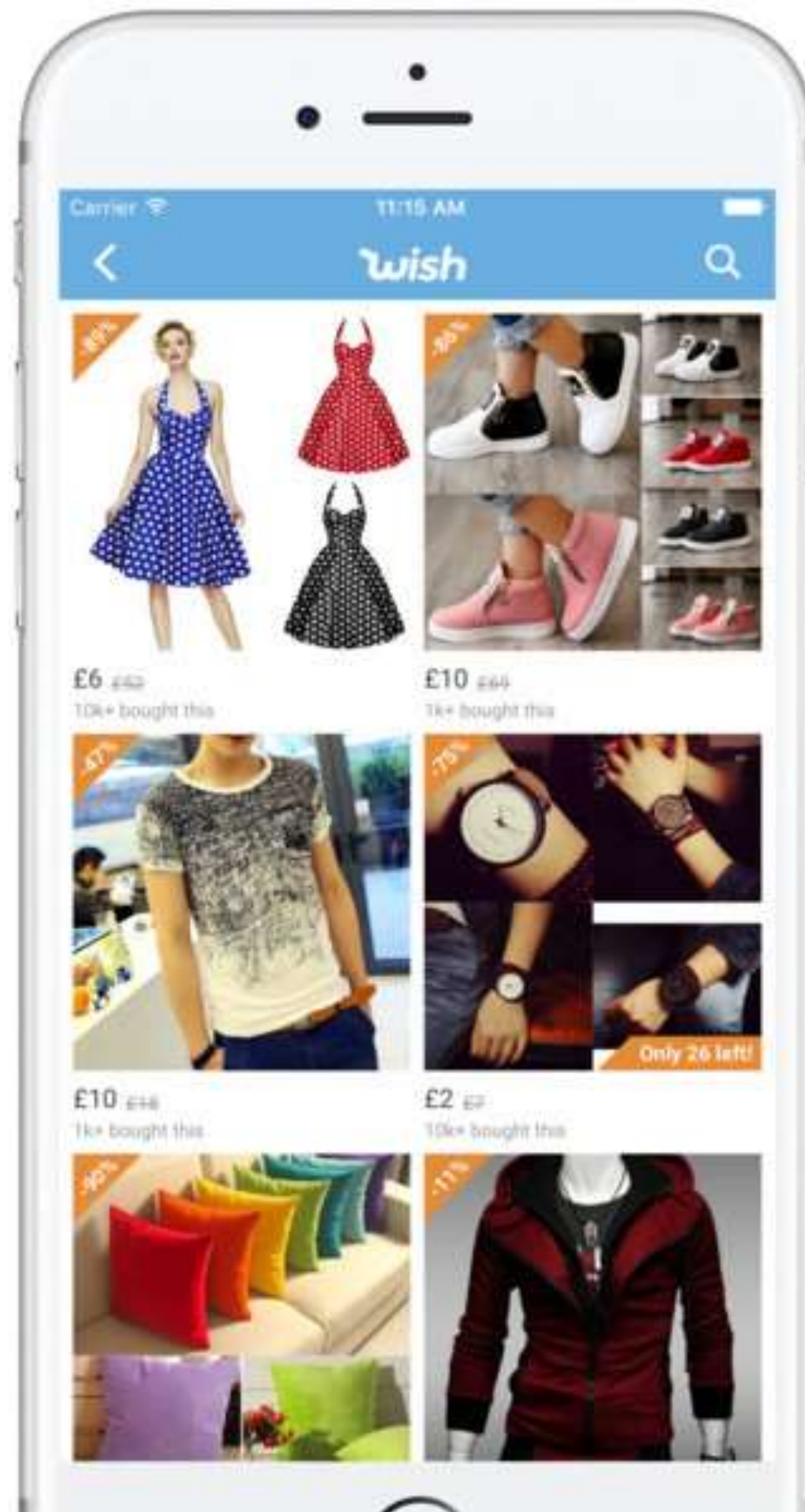
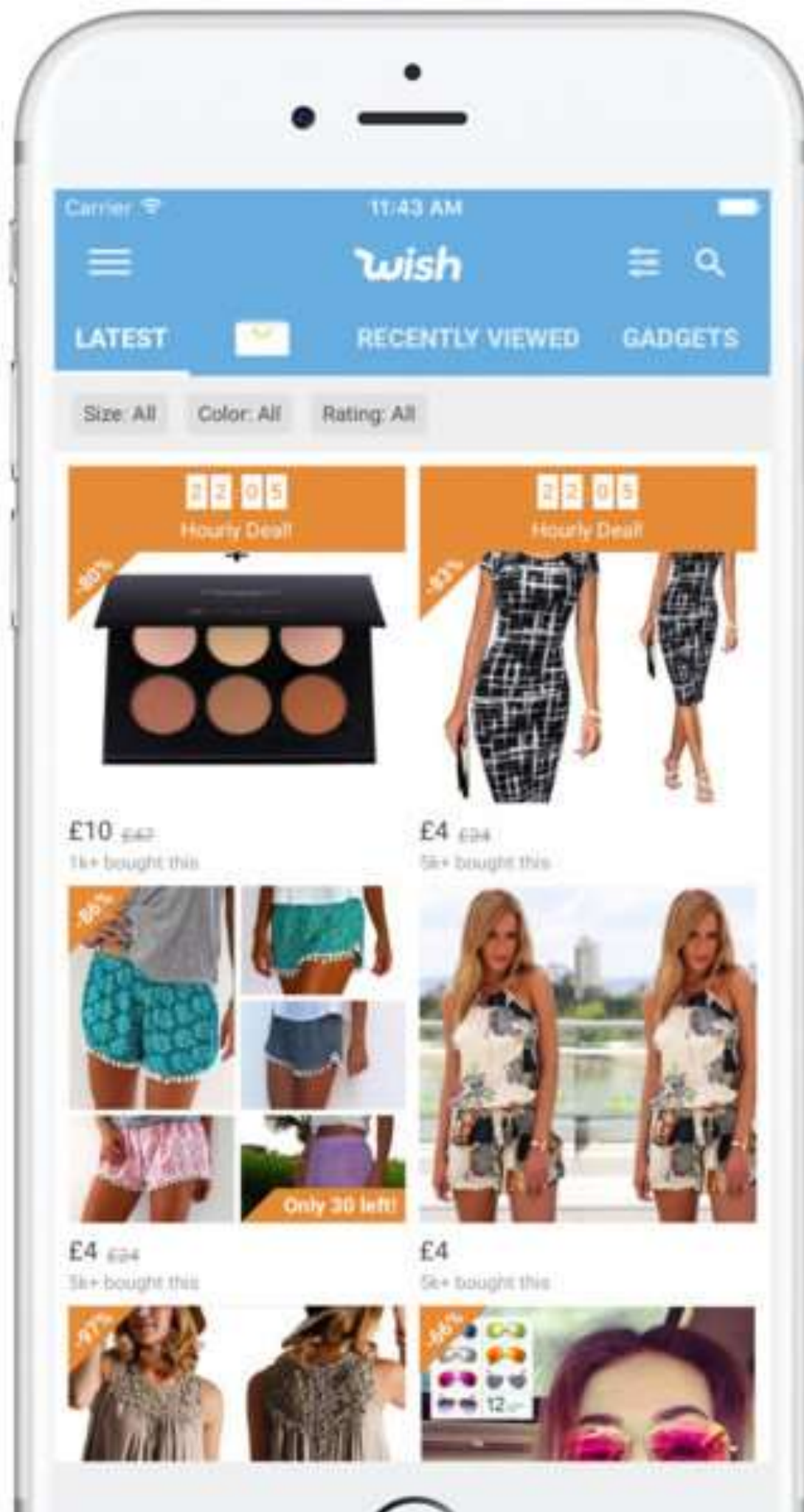
[See How Enjoy Works](#)

PIC
NiC

DER ONLINE-SUPERMARKT MIT GRATIS LIEFERUNG

Beste Lebensmittel, günstigste Preise und gratis
geliefert





wish



Log In | Shopping Bag (0)

Interviews Makeup Skincare Hair

INTO THE GLOSS



EARLY BIRD

How To Become A Morning Person



The Best Under-eye Concealers

According to your favorite makeup artists

[READ MORE](#)

What product should we buy next?

THE LATEST

POPULAR

The Top Shelf: BEAUTY, INTERVIEWED

KEEP IN TOUCH

b) Specialists

celexon™

karten
macherei



SHOEPASSION
— .COM —



OUTFITTERY



mymuesli

Chal-Tec



celexon™
Rollo Leinwände
Für jeden Anspruch die richtige Leinwand

Rollo Leinwände

Neuheiten
Dokumentenkamera
DK500



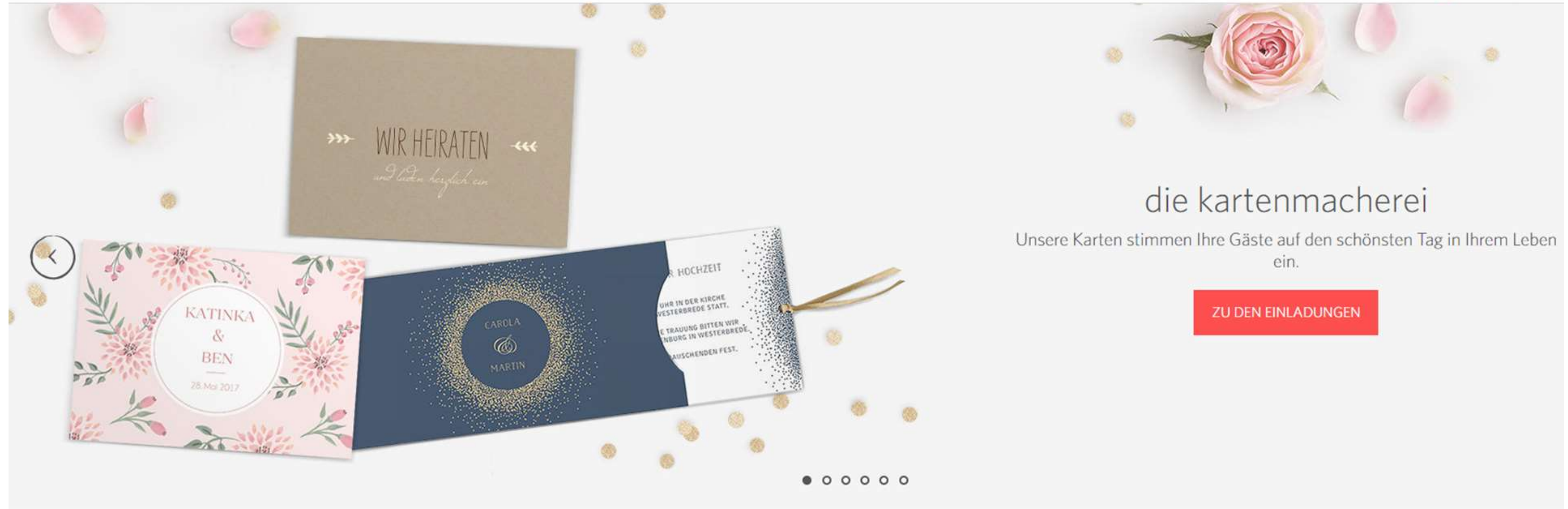
Die Top-Serien
Perfekte Lösung für jegliche Projektionen.

-  **Motor Professional Plus**
-  **Ultramobil Plus Professional**
-  **Mobil Expert, Frontprojektion**

Sonderanfertigung
Maßanfertigung nach Ihren Wünschen

Sollten Sie eine spezielle Maßanfertigung für Ihr Vorhaben benötigen, können wir Ihnen in unserer Expert-Serie Leinwände komplett nach eigenen Wünschen und Farben konfektionieren.





die kartenmacherei

Unsere Karten stimmen Ihre Gäste auf den schönsten Tag in Ihrem Leben ein.

ZU DEN EINLADUNGEN



Besuchen Sie uns
hier in **München!**



SHOEPASSION
.COM
THE BERLIN SHOE BRAND

NEU: ONLINE
SCHUHPFLEGE-
SEMINAR

Herren Damen

Magazin

KOLLEKTION SCHUHPFLEGE ACCESSOIRES INSPIRATION STORES WERKSTATT WISSEN PRINZIP

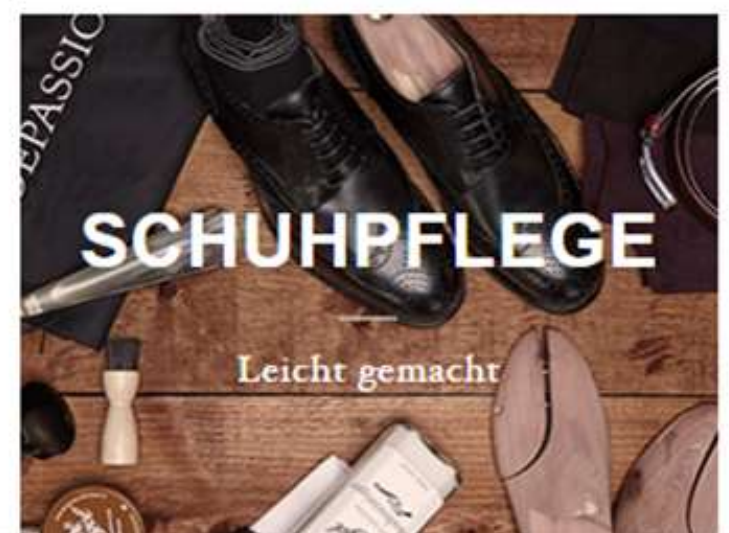
Rahmengenäht & Handgefertigt 100% aus Europa Nachhaltige Fertigung



PREMIUM SNEAKER

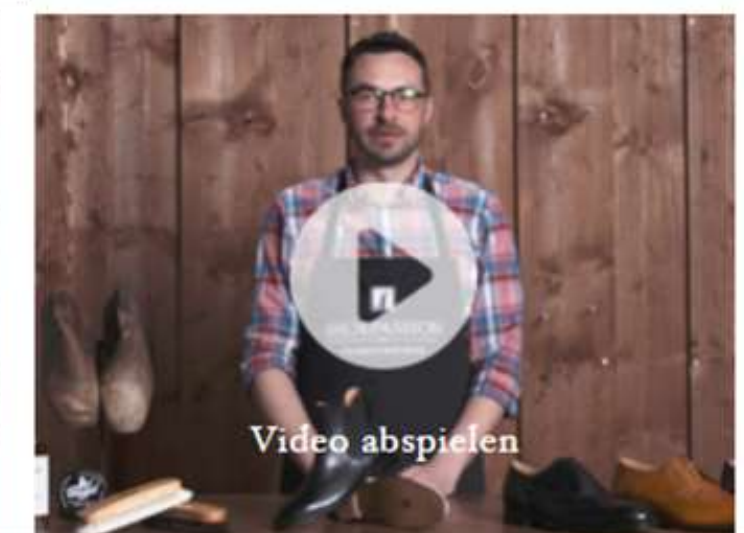
Für moderne Freizeit- & Businessauftritte

PREMIUM SNEAKER FINAL SALE DAMENSCHUHE



SCHUHPFLEGE

Leicht gemacht



Video abspielen



STORES

Besuchen Sie uns vor Ort!

Nachricht hinterlassen

c) The Food Market Potential



- Donate Food
- Make the Change
- Top Rated Baby
- Easter
- £10 Meal Deal

You give We give

Donate food with Ocado ▶

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[Offers](#)
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30% OFF
 your first grocery shop
 + FREE deliveries for a year

Groceries you'll love, perfectly delivered.



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- Ocado Gold Sliced Pancetta
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- Ocado Flat Leaf Parsley
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START TWO-MONTH FREE TRIAL


FRESH DEALS

Big savings on expertly curated seasonal items and favorite brands.


VIEW ALL




Prime Reserve
Local Angus NY Strip Steak,
Boneless
\$16.99/lb ~~\$22.99~~



Family Tree Farms
Jumbo Ultra-Premium
Blueberries
★★★★★
approx. 9.8oz
\$6.99/ea ~~\$8.99~~
2 for \$10



Farm-Raised Arctic Char Fillet
★★★★★
\$12.99/lb ~~\$16.99~~



Local Angus RWA
Boneless Center-Cut Sirloin
Steak
approx. 1.25" thick
\$9.99/lb ~~\$12.99~~

The **Freshest** Groceries
Delivered to your door

\$25.00



PASSOVER MEALS



SOUP & SALAD SALE



RYBARS 6/\$12



2 Big White Almond Cashews 10.99





DEALS

- FRUIT & VEGETABLES
- MEAT & SEAFOOD
- PREPARED FOODS
- BAKERY
- DAIRY & JUICE
- FINE CHEESE & DELI
- PANTRY
- FREEZER
- DRUGSTORE
- BEER
- WINES & SPIRITS

FRUIT & VEGETABLES [SEE ALL >](#)

- FRUIT
- LOCAL FARM SHARE
- PRE-CUT
- VEGETABLES
- ALL FRUIT & VEGETABLES

SALE

 <p>Any 6 for \$6.00 ></p> <p>Cara Cara Orange</p> <p>★★★★☆</p> <p>\$1.29</p>	 <p>4 for \$3</p> <p>Green Cucumber</p> <p>approx. 7oz</p> <p>\$1.29</p>	 <p>4 for \$6</p> <p>Ruby Tango Mandarin</p> <p>\$1.69 \$2.49</p>	 <p>Any 6 for \$6.00 ></p> <p>Blood Orange</p> <p>★★★★☆</p> <p>\$1.29</p>
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MEAT & SEAFOOD [SEE ALL >](#)

- ALL MEAT & SEAFOOD

SALE

	 <p>2 for \$14</p>		
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Bestelle noch heute Deine HelloFresh Box und erhalte 30%
Rabatt auf Deine erste Box.

30% Rabatt



Tschüss Alltag.
HelloFresh.



Das Rezept für mehr Zeit und
neue Lust am Kochen

Chatte mit uns

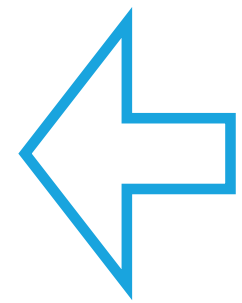
What's next?

**“Companies built around customers
(not products)”**

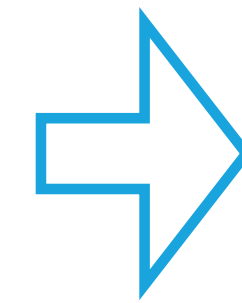
**SHOPPING
EXPERIENCE**



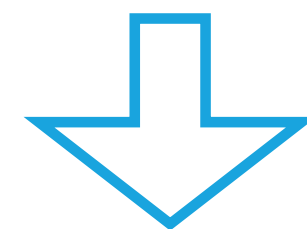
**PLATFORM
PLAYERS**



**ONLINE
RETAILERS**



**MARKETPLACE
STRATEGIES**



**VERTICAL
BRANDS**