

UPA

FORMAZIONE ECOMMERCE
PROGRAMMA WEBINAR
GIUGNO - LUGLIO 2021

In collaborazione con

accenture
Google

AGENDA

- 1. DIGITAL POST COVID SCENARIO**
- 2. GLOBAL E-COMMERCE B2C**
- 3. ITALIAN MARKET**
- 4. E-COMMERCE VS BRICK & MORTAR**
- 5. HOW TO ANALYZE THE COMPETITIVE CONTEXT**

AGENDA

- 1. DIGITAL POST COVID SCENARIO**
- 2. GLOBAL E-COMMERCE B2C**
- 3. ITALIAN MARKET**
- 4. E-COMMERCE VS BRICK & MORTAR**
- 5. HOW TO ANALYZE THE COMPETITIVE CONTEXT**

COVID-19 has permanently reshaped shopper behaviors and the customers landscape, presenting both risks and opportunities



OVERVIEW

COVID-19 is a once in a lifetime threat to people across the planet. It has permanently impacted **how, what and where we buy, substantially accelerating the structural changes that are shaping the industry**. Above all, it is a wake-up call on agility and the capability to be enduringly relevant to consumers, shoppers and customers

In the near-term **different industry segments have different imperatives**, with Tourism and Beauty being hit hard in terms of demand while Food and Home & Care are seeing strong demand increases. **Longer term lasting changes will drive portfolio, channel, customer and route to market revaluations across the industry**

The progressive digitalization of Sales organizations **now needs to dramatically accelerate** for the function to act as a driver of the granular level growth that will be central to recovery



COVID-19





MARKET OVERVIEW

The COVID-19 pandemic forced buyers and sellers to **go digital in a massive way**. What started out as a crisis response has now become the next normal, with **big implications for** how to do business in **the future**.

+27%

Growth rate for the 2020 Worldwide retail ecommerce sales

+50%

Growth of number of ecommerce Business registered in Italy.

+81%

marketplaces growth rate on an annual basis, in the Q4 of 2020



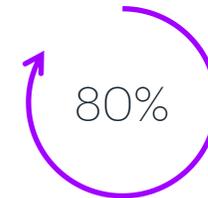
HUMAN OVERVIEW

The global **pandemic** has **displaced how and where** we work, learn, shop and play. We are **shopping on digital channels for products** we've **never bought online** before, with a focus on necessities. The Covid-19 crisis has **changed** consumer's **purchasing habits**, and eCommerce is now more important than ever to them.

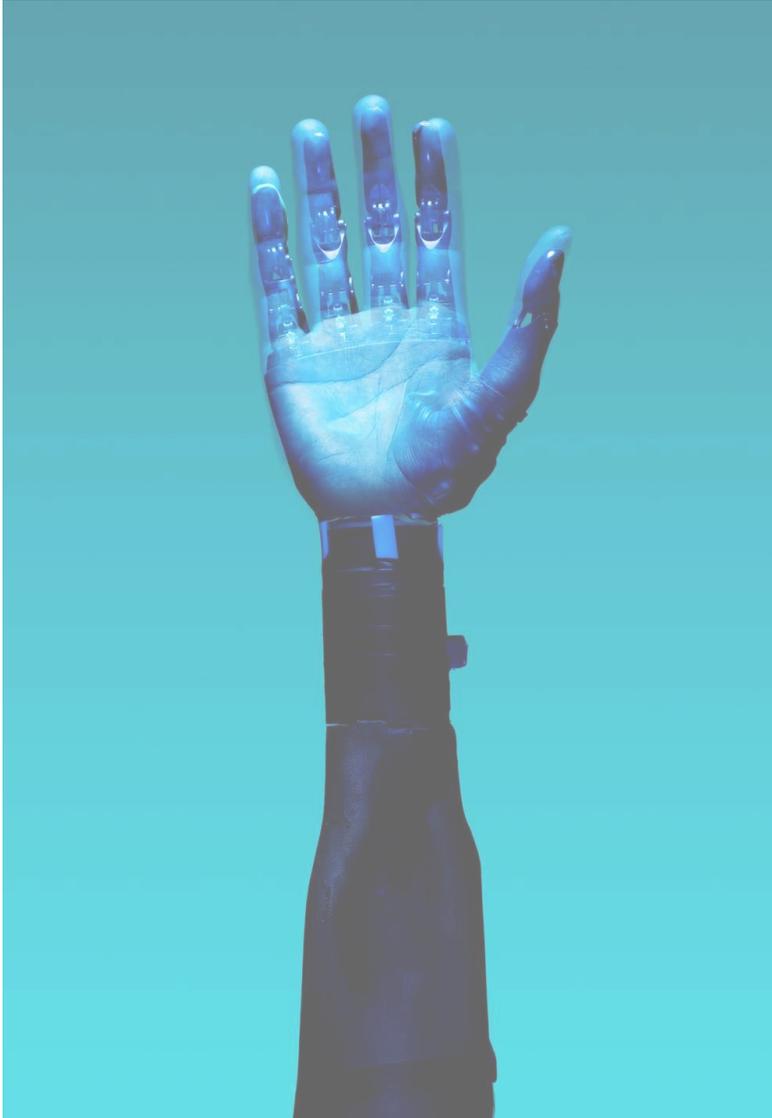
We used digital services pushed **by regulations and fear at first**, we are **continuing** guided by **convenience**. As a **result**, COVID-19 has **amplified** our **demands for better online experiences**.



Of total eCommerce value in Italy is generated by **regular web shoppers** (20 mln). The web shoppers in Italy in 2020 were 27 mln (+13% compared to 2019)



of Global **customers abandon** their **purchases** because of **poor experience** (navigation, poor search results, bad product information)



TECHNOLOGY OVERVIEW

The sudden acceleration of an existing trend.

Tech-celeration

We have seen an **uplift in use** and **investment in new technologies**.

Covid pandemic has led **to large scale adoption of existing technologies** and **boost innovation** in several markets.

What was a quirky novelty just a few years ago has become a powerful utility today.

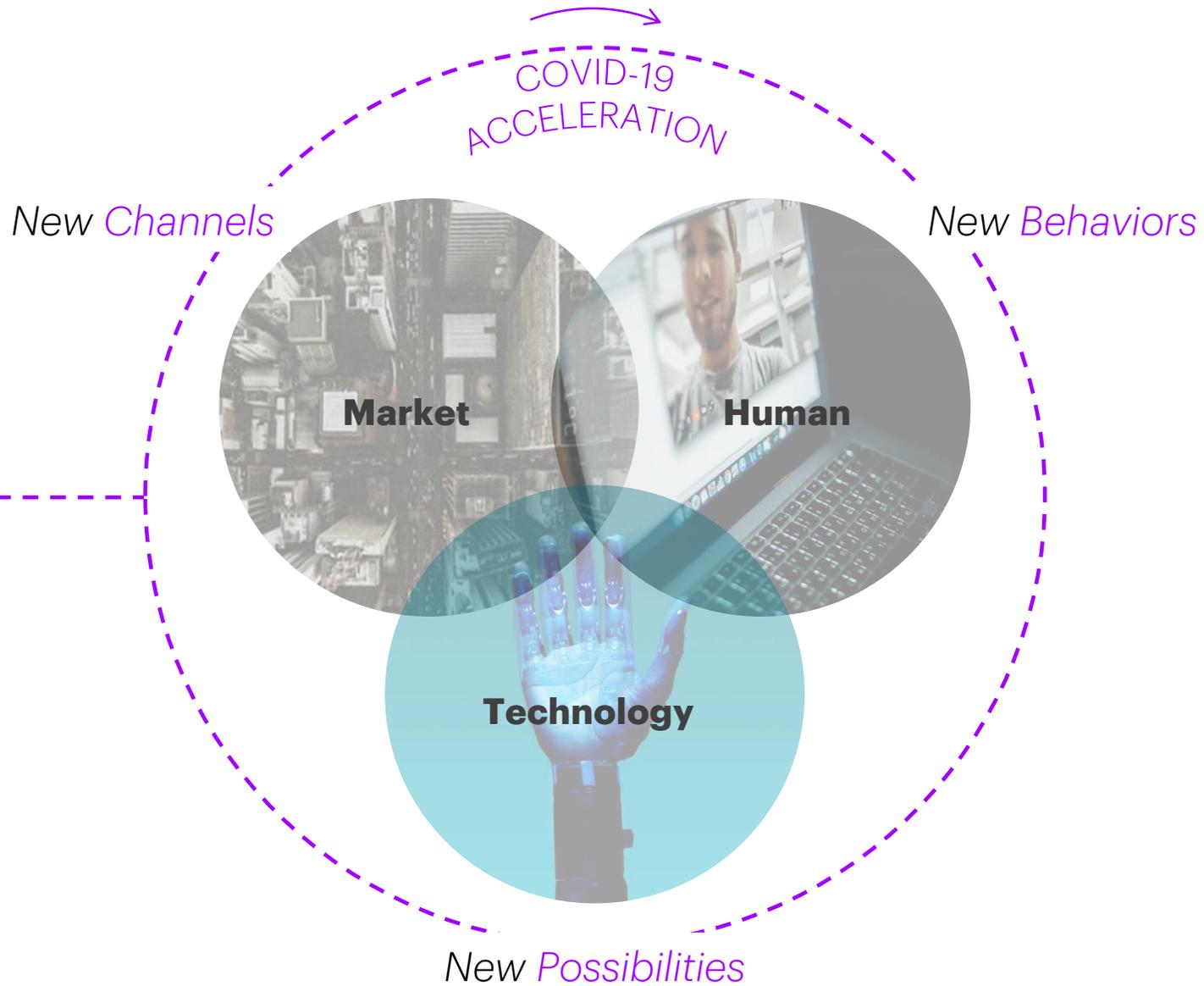
Immersive technology like AR, 360° video, 3D CGI content, VR, Voice control are not only more **sophisticated** than ever, they are also much more **affordable** and **accessible** for brands.

21%

Is the transaction value growth in 2021 of Digital commerce Payment Worldwide

43%

Is the Voice Commerce growth in US in 2020 vs 2019. The US Retail sales via smart speaker were \$2,91 billion in volume



The pandemic has introduced new ways to **Discover, Experience** and **Purchase** Products.

This leads to **new challenges** but also to **new opportunities** for the brands that will quickly adapt to the new normal, impacting the **Italian** and **global** market

AGENDA

1. **DIGITAL POST COVID SCENARIO**
2. **GLOBAL E-COMMERCE B2C**
3. **ITALIAN MARKET**
4. **E-COMMERCE VS BRICK & MORTAR**
5. **HOW TO ANALYZE THE COMPETITIVE CONTEXT**

A world map is centered on a background of light-colored wood grain. The map is rendered in a dark, muted purple color. A horizontal dark grey bar is overlaid across the middle of the map, containing white and purple text.

GLOBAL E-COMMERCE SALES ARE EXPECTED TO INCREASE BY AROUND 14% IN 2021, AND WORLDWIDE SALES AREN'T TOO FAR AWAY FROM \$5 TRILLION

LAST YEAR, PANDEMIC-DRIVEN DEMAND FOR ECOMMERCE ACCELERATED ECOMMERCE SALES GROWTH WORLDWIDE



Despite a challenging year for retail in **2020**, worldwide retail ecommerce sales posted a **27.6% growth rate** for the year, with sales reaching well over \$4 trillion. The **ecommerce penetration** in 2020 reached **18%**. All National markets, covered by eMarketer, ended up with at least double-digit ecommerce growth in 2020.

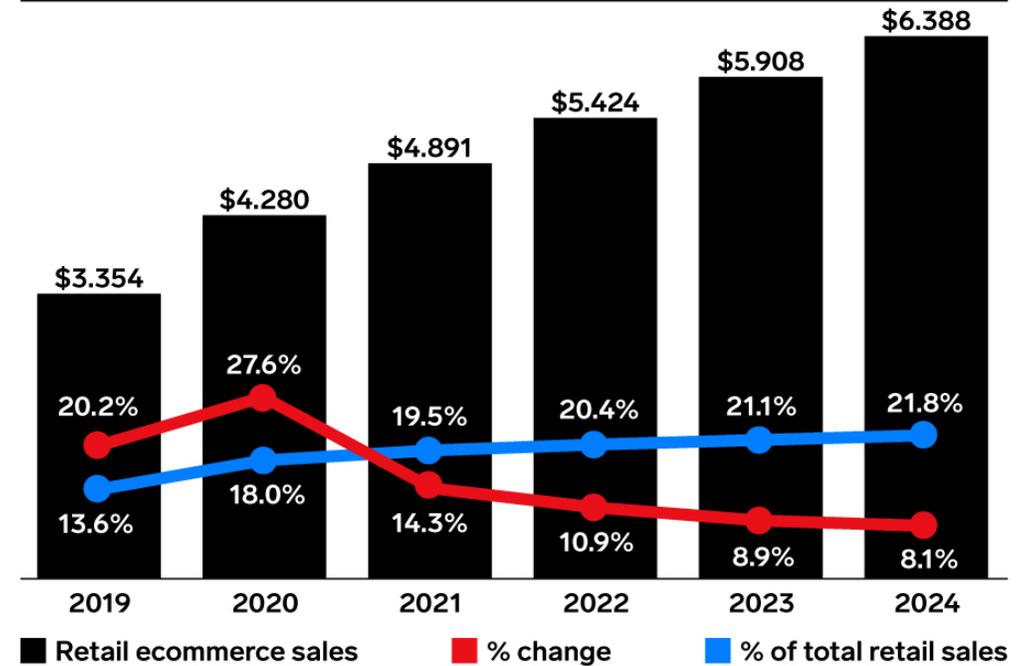


Ecommerce **growth** will **decelerate** substantially **in 2021** to 14.3% as brick-and-mortar sales recover. eMarketer forecast that overall **worldwide retail** will **rebound to 5.1%** growth in 2021.



The pandemic shattered the services sector to the benefit of the retail sector, but **services providers will reclaim their share of consumers' wallets in 2021**. This, plus more-normal brick-and-mortar operations, will serve to moderate ecommerce growth.

Retail Ecommerce Sales Worldwide, 2019-2024
trillions, % change, and % of total retail sales



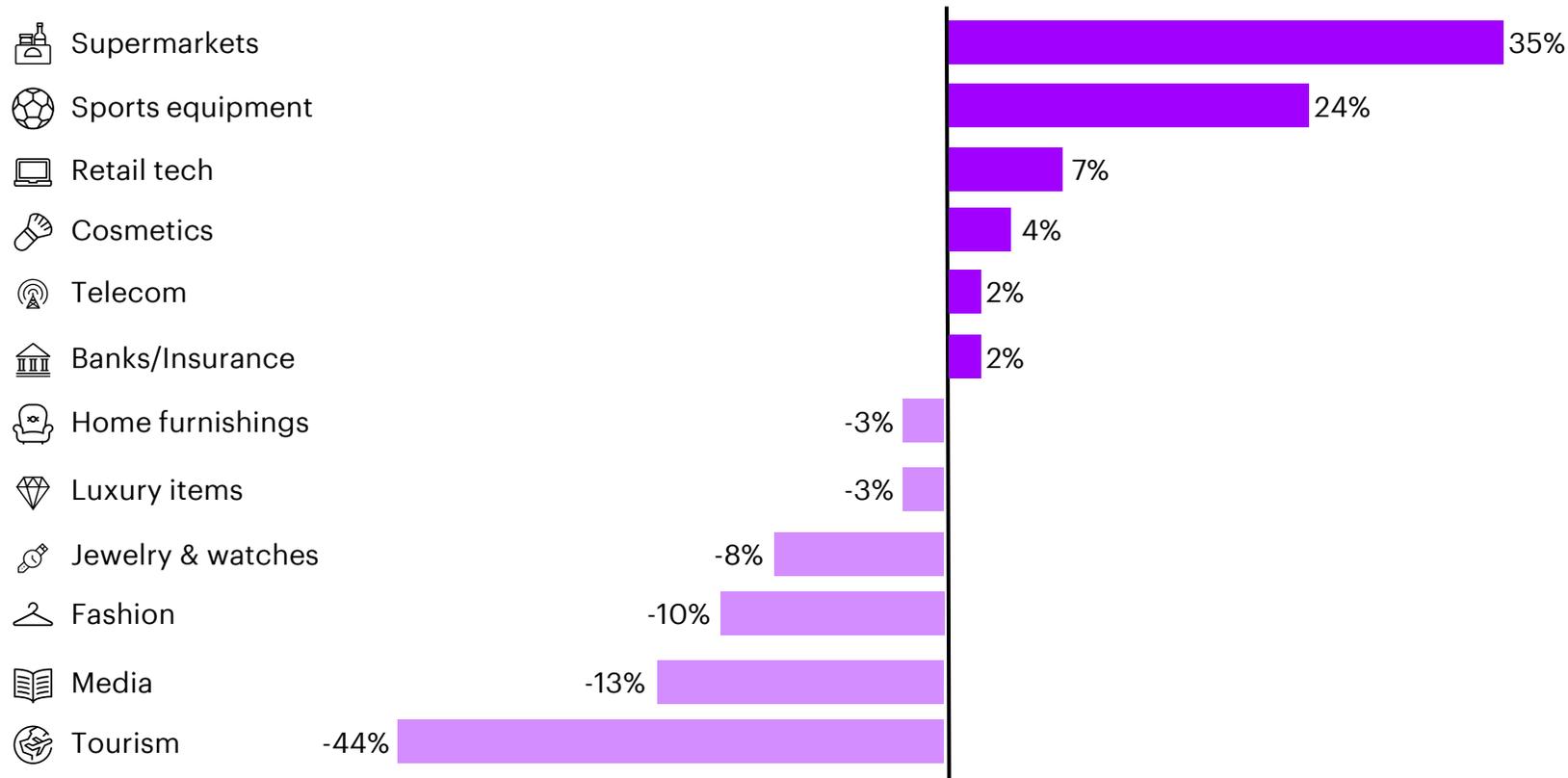
Note: includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets, payments such as bill pay, taxes or money transfers, food services and drinking place sales, gambling and other vice goods sales
Source: eMarketer, Dec 2020

261834

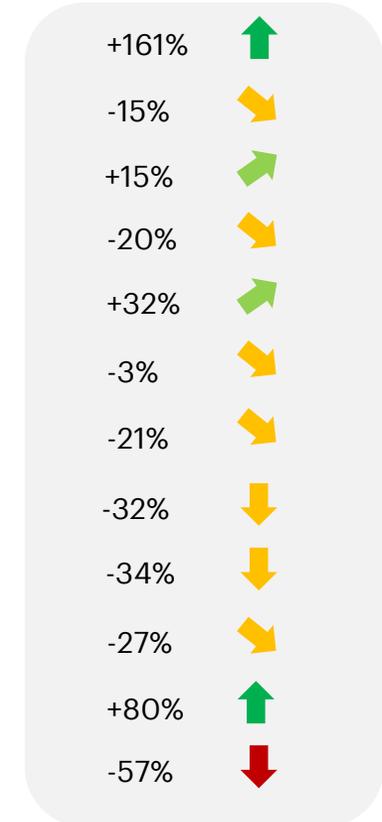
eMarketer | InsiderIntelligence.com

CONSUMER ONLINE INTERESTS SHIFTED DURING COVID-19 AND PUSHED WEB TRAFFIC TO SUPERMARKETS

Covid-19 impact on global online traffic: November 2020¹



March 2020²



1: Worldwide; week ending November 13, 2020 compared to reference (Jan 6 to Feb 16); 1,400 sites; 4.8b sessions, and 7 billion visits across the world

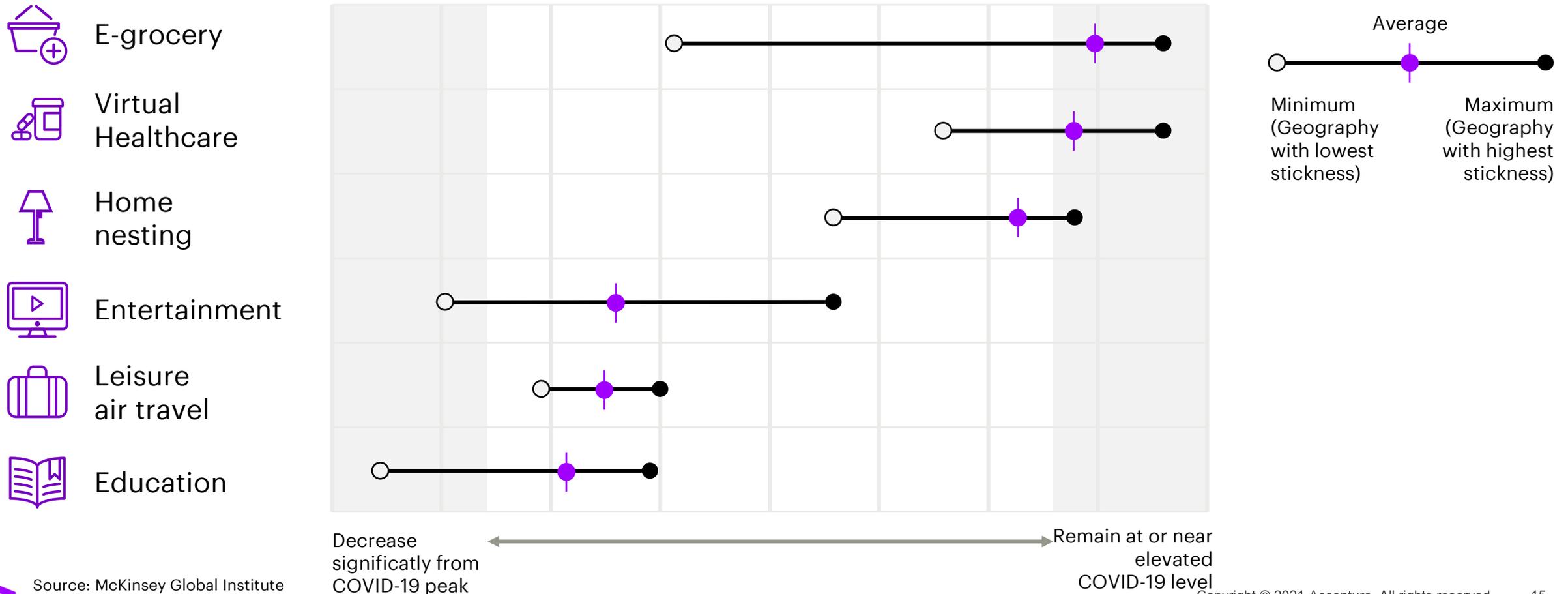
2: Worldwide; week ending March 16, 2020 compared to reference (Jan 6 to Feb 16); 1,400 sites; 4.8b sessions, and 7 billion visits across the world

Sources: ContentSquare as of November 9, 2020, Statista

WHAT BEHAVIORS WILL STICK ONLINE AND WHAT WILL NOT DIFFER BY SECTOR AND GEOGRAPHY

Overall statics show e-grocery is the most sticky and remote education the least

AVERAGE AND VARIANCE OF POST-COVID-19 STICKINESS SCORE BY SECTOR



CONSUMERS HABITS ARE EVOLVING TOWARD THE DESIRE OF **DIGITAL TOOLS**, **MORE PRODUCT DETAILS** AND **SUSTAINABILITY**



Imagine or would like to have more digital services to support them, using the **phone as a remote control** for both physical and digital shopping



Research information with smartphone and pc before making the purchase (64%¹)



Take into account the **origin of the products** and how they have been produced



Are more aware of **environmental issues**, sustainability and packaging



Want to see **product reviews** before purchase, 25%¹ of customers prefer to have them directly on ecommerce wishlist

AGENDA

1. **DIGITAL POST COVID SCENARIO**
2. **GLOBAL E-COMMERCE B2C**
3. **ITALIAN MARKET**
4. **E-COMMERCE VS BRICK & MORTAR**
5. **HOW TO ANALYZE THE COMPETITIVE CONTEXT**

THE ITALIAN ECOMMERCE MARKET GROWN BY 3% in 2020 AND FOR 2021 THE FORECAST IS +19%

€ 32,4
BLN

2020 eCommerce purchases*

*The eCommerce market includes online sales of physical goods to a private end user and (B2C) and digitally distributed services (e.g., travel tickets).

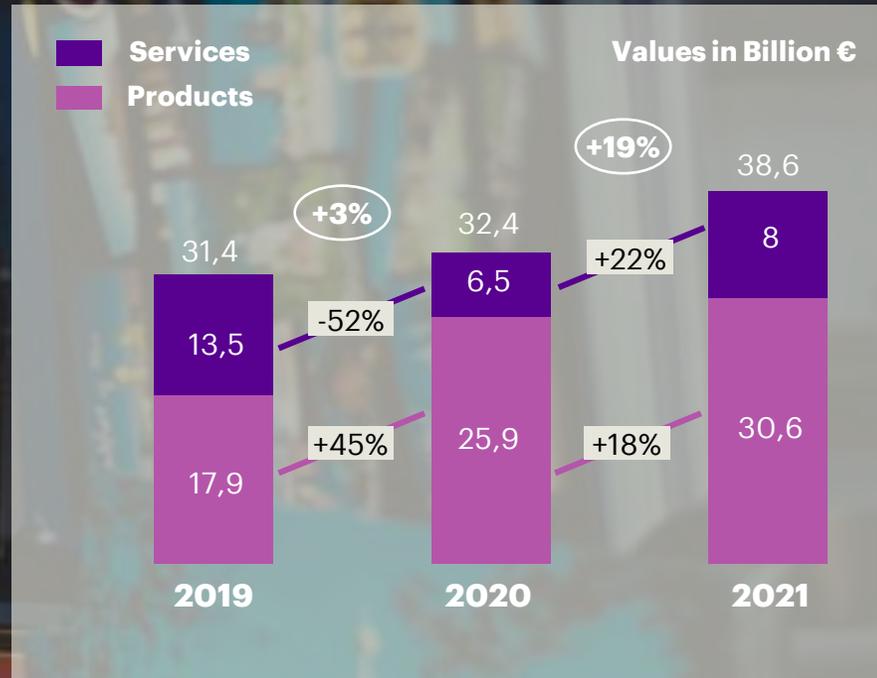
Source: Osservatorio PoliMi – B2C ecommerce, June 2021



THE ITALIAN E-COMMERCE PURCHASES IN SERVICES HAVE DROPPED IN 2020 DUE TO COVID-19

- 52 %

Services purchase



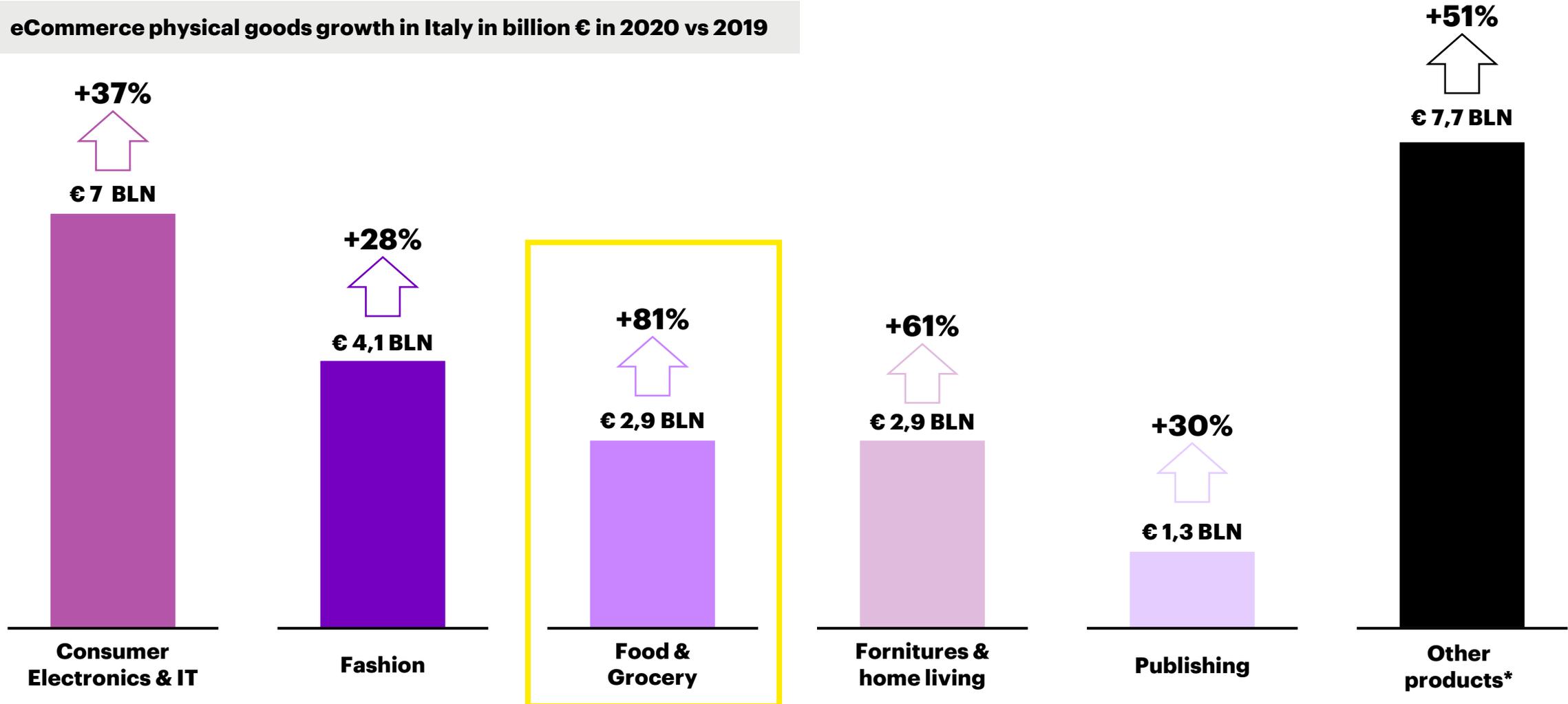
WITH €7 BILLION, **ELECTRONICS** IS THE LARGEST CATEGORIES IN ITALIAN ECOMMERCE

eCommerce physical goods purchases in Italy in billion € in 2020



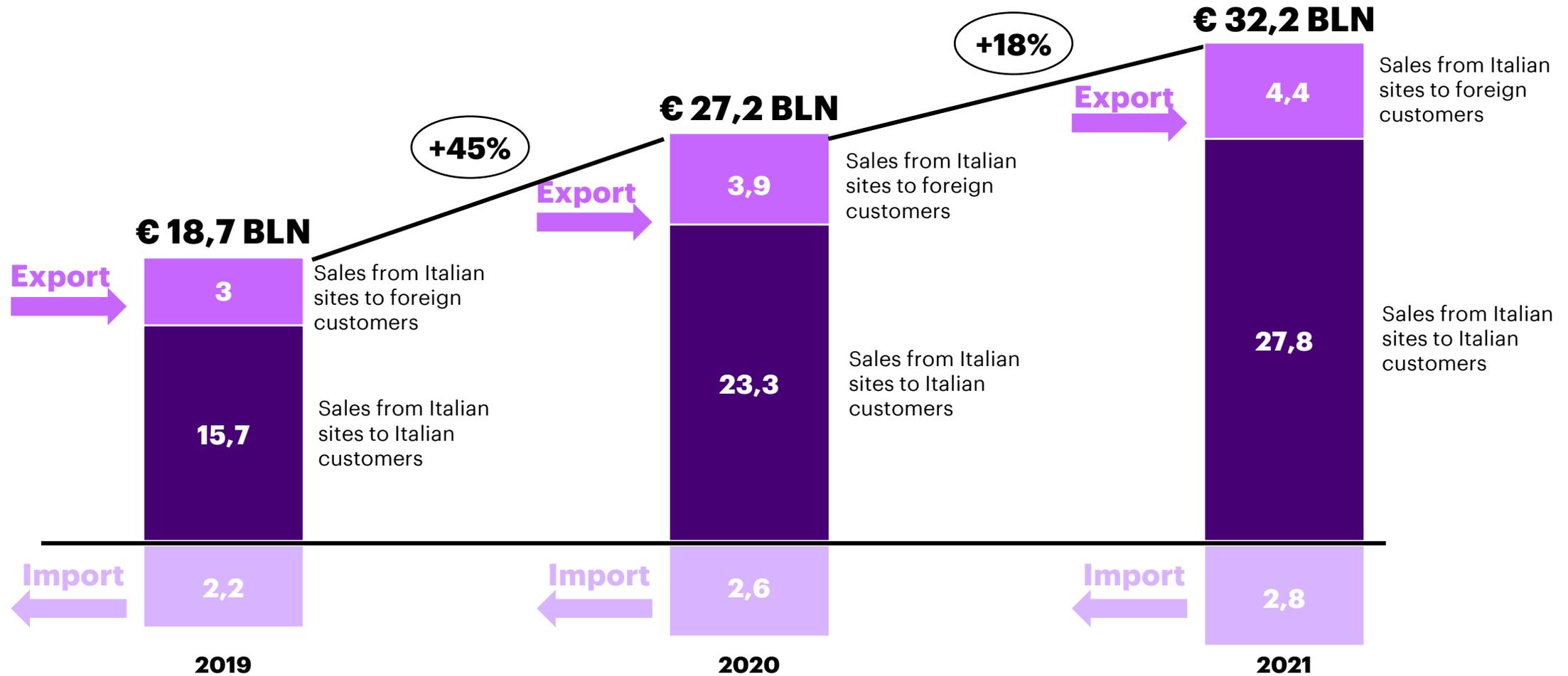
FOOD & GROCERY CATEGORY HAS GROWN THE MOST IN ITALY

eCommerce physical goods growth in Italy in billion € in 2020 vs 2019

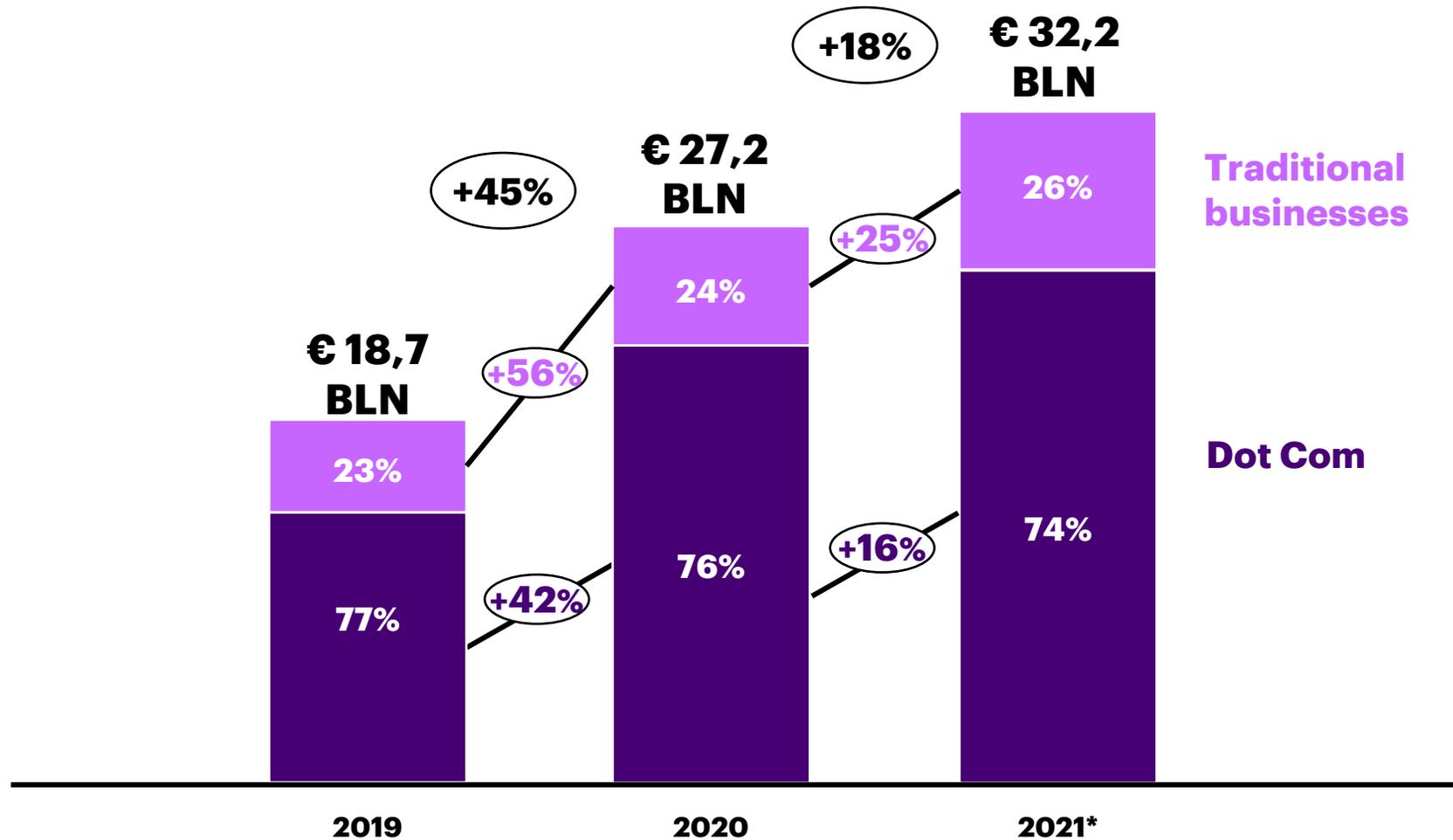


THE COMMERCIAL BALANCE OF ECOMMERCE

B2C OF PRODUCT



B2C ECOMMERCE SALES OF PRODUCTS BY TYPE OF PLAYER



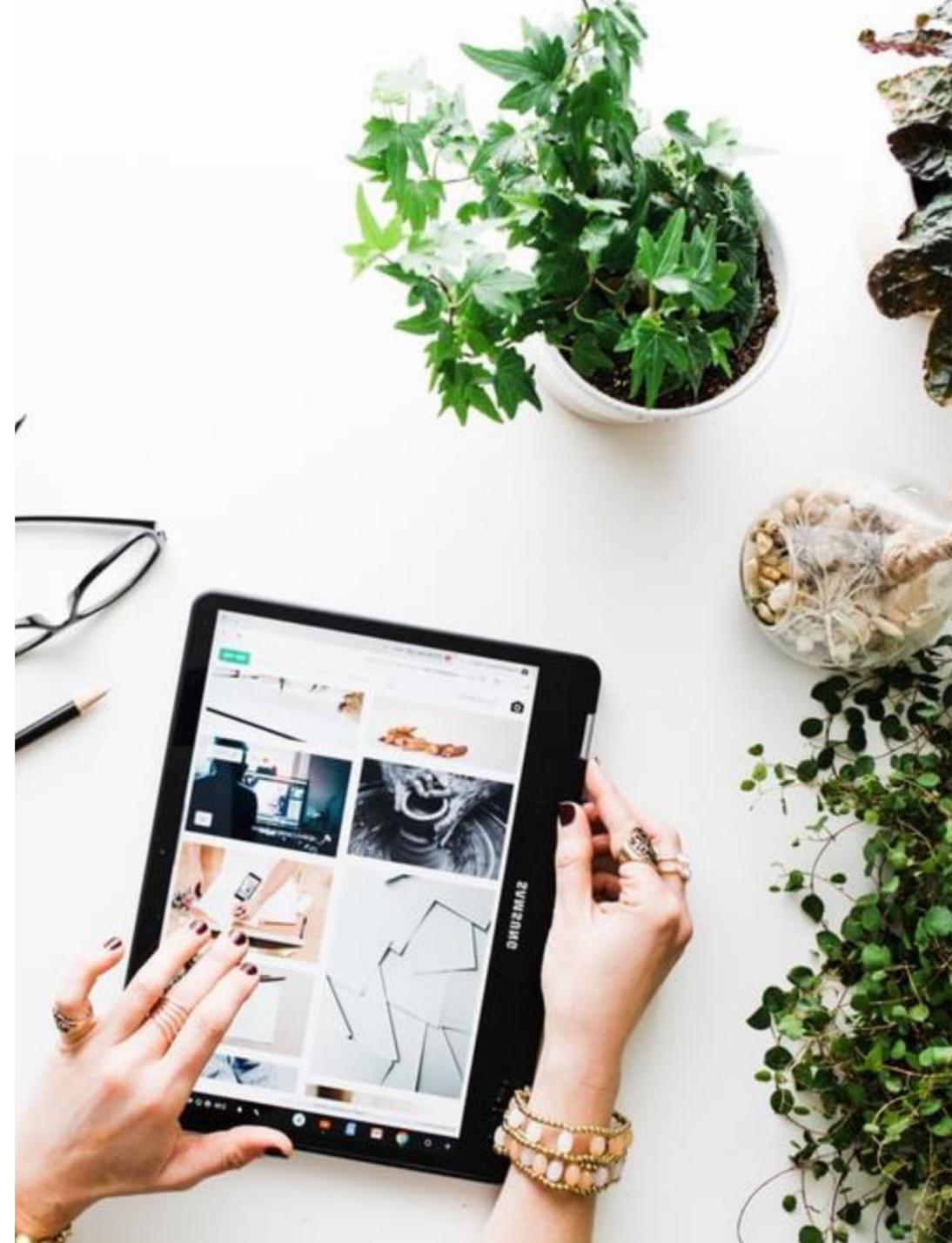
THE MARKET VOLUME OF THE TOP 5 ITALIAN STORES HAS INCREASED BY 60% SINCE 2017



The biggest player in the Italian eCommerce Market is **amazon.it**. The store had a revenue of US\$4.1 billion in 2020. It is followed by **esselungaacasa.it** with US\$693 million revenue and **unieuro.it** with US\$575 million revenue.



Altogether, the top 3 stores account for **25% of online revenue** in Italy

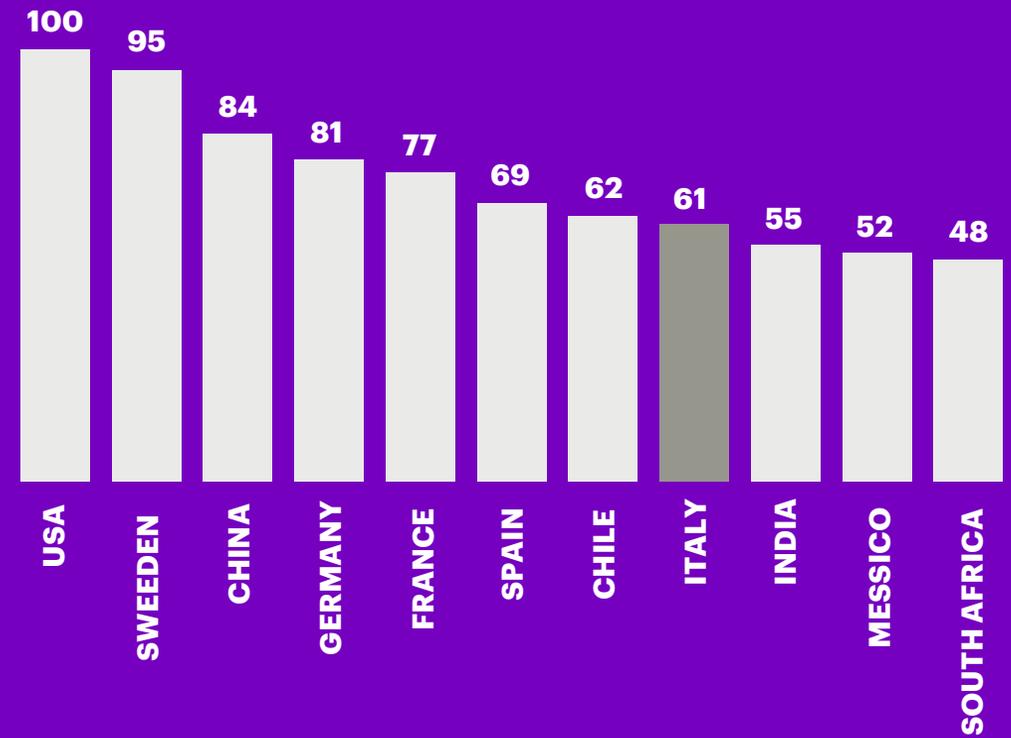


DESPITE THE DIGITAL BOOM OF 2020, PRO-CAPITE PURCHASE IS LOW IN ITALY...

Value of average annual eCommerce purchases of products in 2020 in \$



...THE DIGITAL COMPETITIVITY INDEX OF ITALIAN COUNTRY IS STILL NOT IN LINE WITH OTHER MAIN COUNTRIES



ITALIAN CONSUMERS: KEY FINDINGS



33 Million

eCommerce users
in 2020



55%

eCommerce
penetration



71%

Research on the
internet before
a purchase



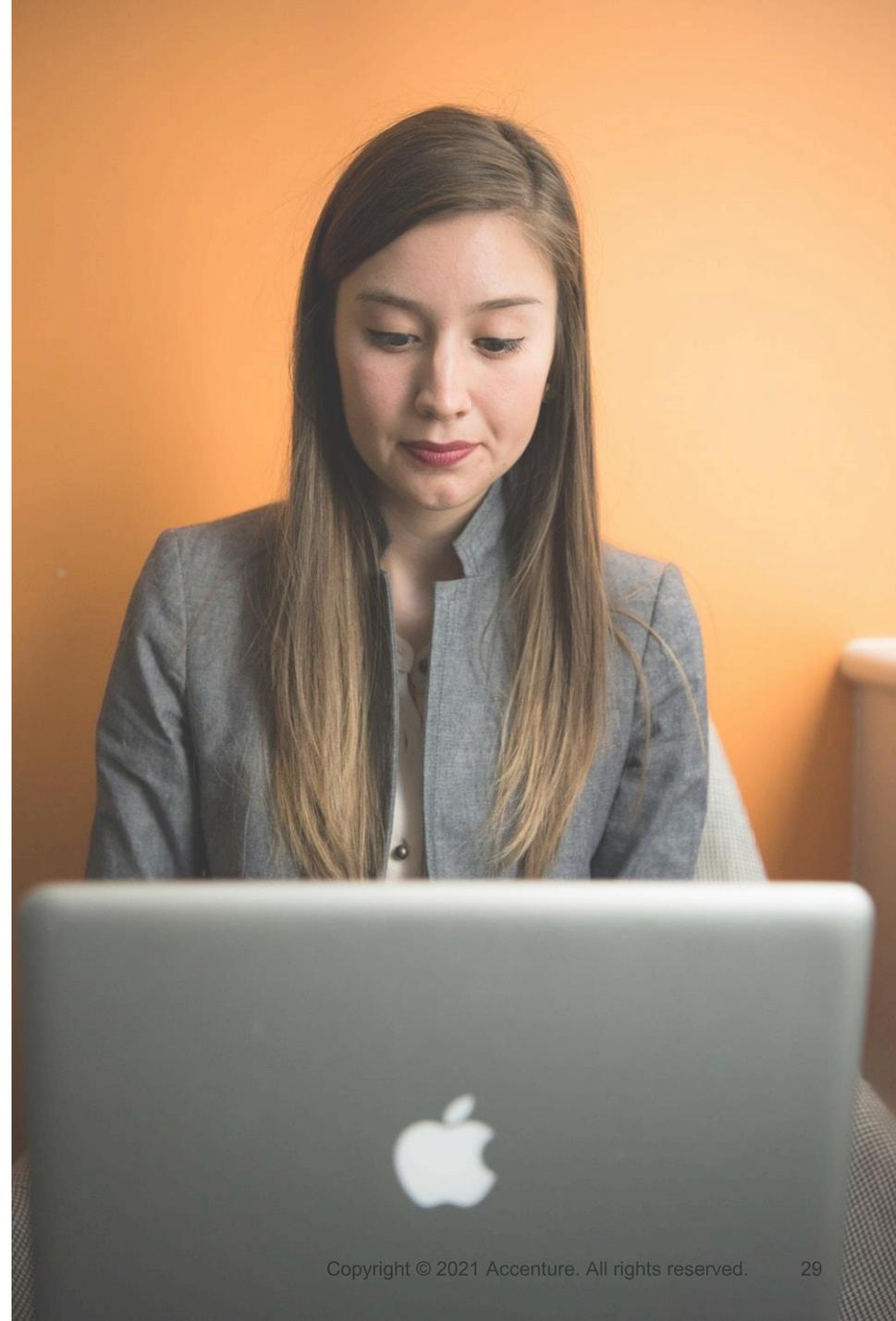
THE NUMBER OF ECOMMERCE USERS IS EXPECTED TO GROW BY 21% TO 40 MILLION USERS IN ITALY BY 2024



According to Statista Global Consumer survey, in Italy, the main reasons among consumers for shopping online **are cheaper prices** (73% of online shoppers in Italy agree), **home delivery** (62%), and a **greater product range** (51%)



70% of online shoppers in Italy have used a **smartphone for online purchases** in the last 12 months

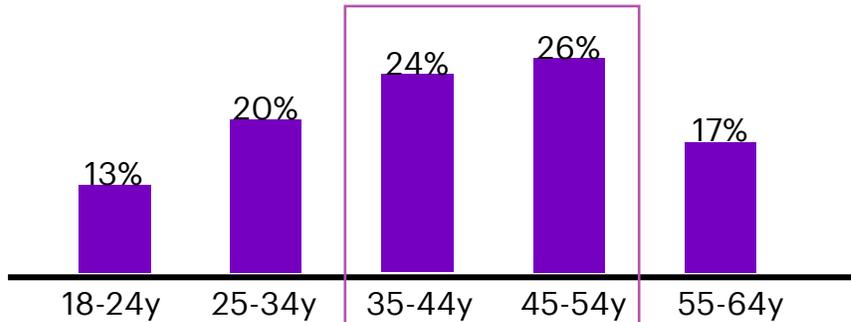


WHO IS THE ITALIAN ONLINE SHOPPER?

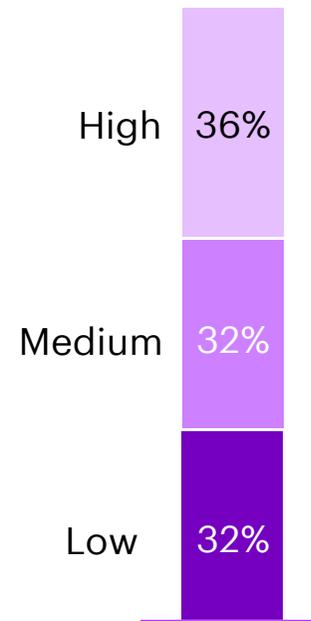
In Italy gender and households income are not so relevant as a discriminant, Statista data show that **both gender** (Male & Female) regardless the income, purchase on **online channel**

The italian shoppers **most active** on ecommerce are from **35 to 54 years** old

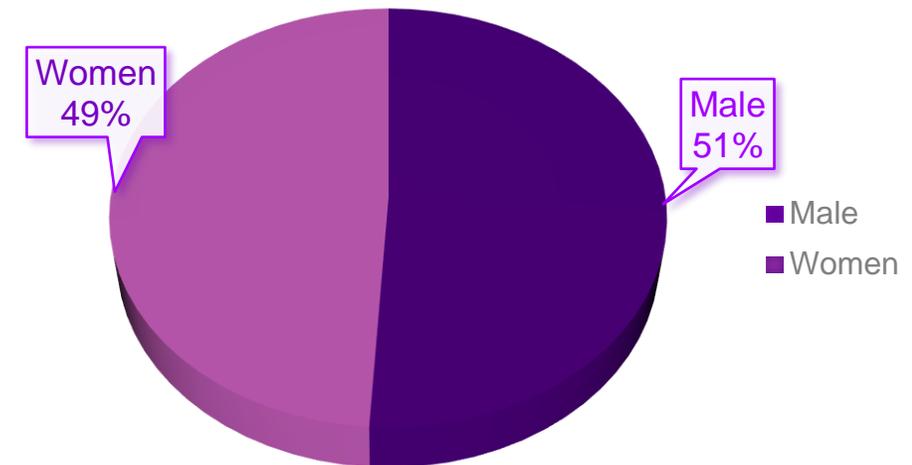
AGE



INCOME



GENDER



AGENDA

1. **DIGITAL POST COVID SCENARIO**
2. **GLOBAL E-COMMERCE B2C**
3. **ITALIAN MARKET**
4. **E-COMMERCE VS BRICK & MORTAR**
5. **HOW TO ANALYZE THE COMPETITIVE CONTEXT**

STORES CHANGES

Retailers are under unprecedented pressure to **maximize return on their physical assets** and **adjust operations for omnichannel**.

Rethinking the approach to store portfolio and enabling analytics-driven footprint rationalization will allow retailers to protect or win market share and build a strong foundation for profitable growth and innovation.

What|Retail Reorganization



Infrastructure Resizing and Omnichannel Integration

- **Coop** (June 2020): digitalization of stores, push to click & collect and omnichannel integration, neighborhood shops
- **H&M** (Feb. 2020-June 2020) closed 170 shops and announced a strategic concept change: the stores become an online support logistic hub
- **Zara** (June 2020) announced the closure of 1,200 stores, and the investment of one billion euros in eCommerce; rather than cutting headcounts, **staff will be dispatching online purchases**.



Dot.Com Companies go physical

- **Cortilia**, the Italian online agricultural market, opened its first **physical shop** in the Central Market in Turin
- **Google** to open its first retail store to sell devices this summer 2021 in NY proposing products **showcases, how-to workshops** and more
- **Amazon** extended the Amazon Go format, opening its **first real supermarket cashierless** in Seattle
- **Tannico**, the Italian wine ecommerce, opened its first physical wine shop in Milan

OMNICHANNEL SERVICES THAT MAKE A DIFFERENCE IN AN ECOMMERCE PLATFORM, ACCORDING TO ITALIAN CUSTOMERS



55%

Checking online
in store
availability



44%

Ordering online and
picking up in the store
(**Click & Collect**)



43%

Return/replacement in
the store of items
ordered online



36%

Home delivery of
products **purchased**
in the **store**



22%

Online Store
Locator
functionality



17%

Picking up **purchased**
items in the store
outside opening hours



10%

Buying in store
&
return online

Survey Response

Which of these services would you like to use? (multi-pick)



>33% of interest



<33% of interest



THE FACETS OF THE NEW STORE



EXPERIENCE HUBS

Offering unique customer experiences where to «live» the brand identity and test/try/get showcased products within an immersive environment. Moreover, the store can offer special merchandising and unique prices.



LOUIS VUITTON



«PHYGITAL» BLEND

Creating spaces where Digital and Physical become an «unicum», customer can explore the store, pre-book products for trial, look for info, buy, etc. seamlessly across physical and digital world.



LUSH FRESH
HANDMADE
COSMETICS



FULFILLMENT & PICKUP CENTERS

Meeting the rising demand for contactless fulfillment and advanced delivery, with curbside pickup, buy online, pick up in store features. Sometimes, customers purchase directly from the in-store inventory and get them delivered from the store associates.



 **zalando**



EXPERIENCE HUB



POP-UP

SELFRIDGES: has just launched a **pop-up** that brings to life a **fantastic world**. Through **QR codes**, the commercial space is filled with mushrooms, bees and blooming flowers, all in the Augmented-Reality version.

LOUIS VUITTON: has introduced an **AR experience through its app**. This is how the characters of 'Zoooom with friends' come to life in the Parisian pop-up, a cartoon, in conjunction with the spring / summer 2021 fashion show.



LOUIS VUITTON

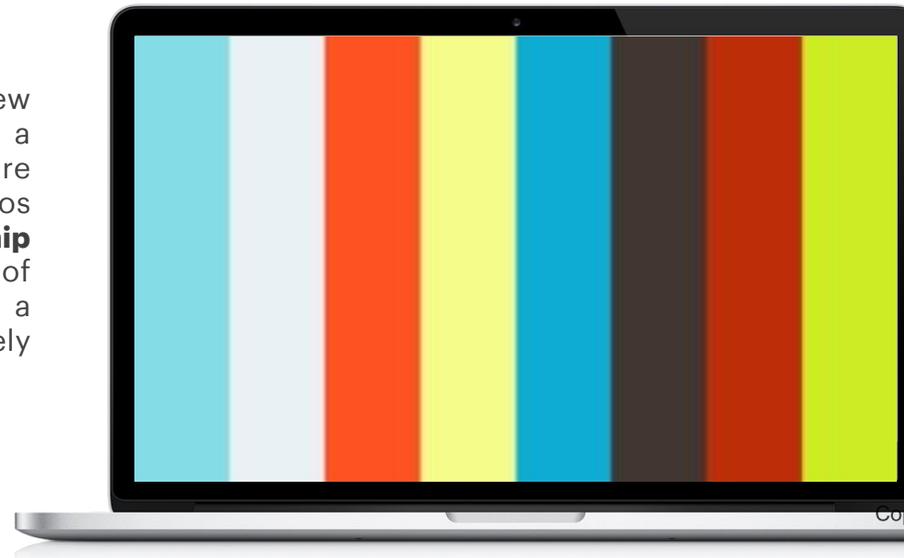
NISSAN: For the launch of the new Nissan JUKE model, it developed a **gamification project**: customers are hired with a sequence of demos **inside and outside the dealership** that invite them to enter the role of the secret agent to complete a special mission and ultimately unlocks a code to **claim a reward**.



BURBERRY CONNECTED STORE

The 5,800-square-foot Burberry store is split up into **10 rooms** for customers to **explore** and **interact** with, either in **person** or through **social media**. Through a dedicated **WeChat mini program**, shoppers will be able to earn social currency as they explore the store, which they can use to **access exclusive content and personalised experiences**

The program features **store tours** and **product information**, and acts as a portal for client services, such as **in-store appointment bookings** and **events reservations**.



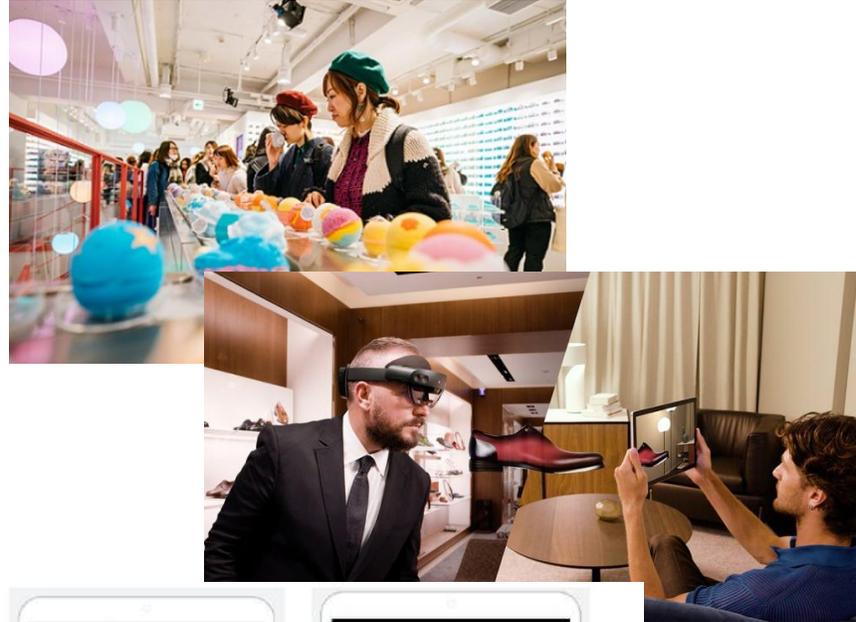
«PHYGITAL» BLEND



AUGMENTED INFORMATION & EXPERIENCE

Lush presented a concept that offers a completely **innovative shopping experience** aimed at **merging online and offline**. Augmented reality and artificial intelligence become the protagonists.

With the **Lush application**, customers can turn their phone into an **exploration and discovery tool**: by scanning each bath bomb it is possible to find out what its **ingredients** are, the **information** relating to the product and admire the **spectacular effects** of the bomb in action, without using water, and in a **“language-free”** store



DIGITAL TO SUPPORT PERSONALIZATION

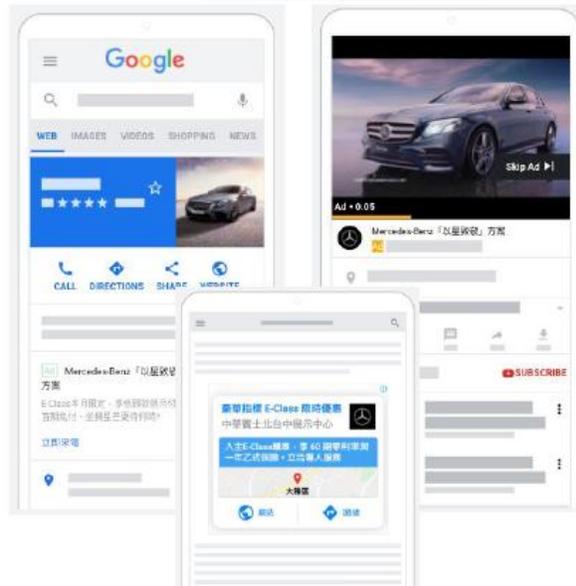
Salvatore Ferragamo bring the in-store shopping experience online through Augmented Reality. And **overlays digital content into the physical world** in order to choose and realize the Tramezza shoes collection. Both **online** and in **physical stores**, customers can interact with materials, colors, details and finishes to give life to their custom made to order Tramezza.

When online, a client advisor can also enter user virtual role to support the choice and configuration. In addition, Ferragamo allows to **visit its stores** and visit the **Ferragamo Museum** without leaving home with AR features.

MERCEDES-BENZ

Mercedes-Benz leverages **Local campaigns to drive showroom visits** from audiences who expressed interest in new cars. In both the text and video ads, Mercedes-Benz designed a specific **promotional deal** and created a **clear call to action** for customers.

After one month, Mercedes-Benz **saw 5X increase in directions**, over **1,5X more calls** with **5,7X better CPA**. Additionally, Mercedes-Benz found that **audiences engaged more with differentiated marketing strategies** on weekdays compared to weekends, which helped the team sharpened their marketing strategy



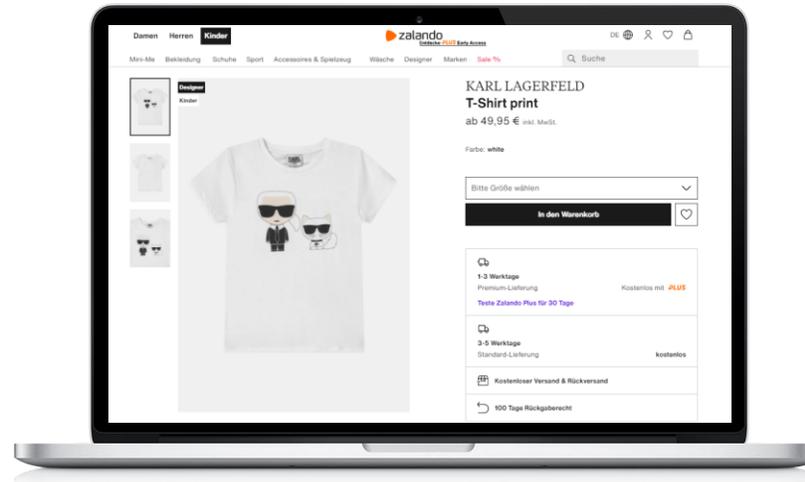
FULFILLMENT & PICKUP CENTERS



DIGITAL SUPERMARKET

The **100% digital Macai supermarket** bets on **quick commerce** and opens the **first dark store** in Milan, a warehouse from which to deliver shopping to customers within a quarter of an hour. "Our goal, in the coming months, is to build new consumption habits by becoming a reference point for online shopping", explains the company born in 2020. "We are convinced that in 5 years it will be normal to order your own shopping and have it delivered at home in a few minutes".

The **plan**, explains Macai, is to launch **more than 40 dark stores** by the end of the year, a good part of which in Italy and about a third abroad.



CONNECTED RETAIL

KARL LAGERFELD integrated their physical German stores with the Zalando platforms in order to **reduce lost sales** and **drive stores profitability**

Zalando provides the opportunity to **efficiently replenish items online that would have otherwise been out of stock**, using stock from the KARL LAGERFELD Munich store

In about 6 months, **more than 1,400 orders have been shipped through the KARL LAGERFELD Munich store**. These orders are all incremental and were fulfilled only thanks to this new model.



AGENDA

1. **DIGITAL POST COVID SCENARIO**
2. **GLOBAL E-COMMERCE B2C**
3. **ITALIAN MARKET**
4. **E-COMMERCE VS BRICK & MORTAR**
5. **HOW TO ANALYZE THE COMPETITIVE CONTEXT**

THREE STEPS OF ANALYSIS

1.



DEFINE AREA OF ANALYSIS

Setup the objective or your analysis

What's the goal of the overall research?

What do you want to improve? Which is the challenge you are trying to solve?

What do you want to learn / discover by analyzing the competition?

2.



DEFINE LIST OF COMPETITORS

Identify the competition

Who are the ones you are competing with?

Which other industry's player are the best in class for some features?

Market Knowledge

Desk Research:

- Financial Reports
- eCommerce Performances
- Digital/physical Presence
- Audience analysis

3.



PERFORM ANALYSIS

Analyze the competition

- **Online Experience**
- **Traffic & Digital Performances**
- **Sentiment Analysis**
- **Omnichannel Presence & Services**



THREE STEPS OF ANALYSIS

1.



DEFINE AREA OF ANALYSIS

Setup the objective or your analysis

What's the goal of the overall research?

What do you want to improve? Which is the challenge you are trying to solve?

What do you want to learn / discover by analyzing the competition?

2.



DEFINE LIST OF COMPETITORS

Identify the competition

Who are the ones you are competing with?

Which other industry's player are the best in class for some features?

Market Knowledge

Desk Research:

- Financial Reports
- eCommerce Performances
- Digital Presence
- Audience analysis

DEEP DIVE

3.



PERFORM ANALYSIS

Analyze the competition

- **Online Experience**
- **Traffic & Digital Performances**
- **Sentiment Analysis**
- **Omnichannel Presence & Services**

ONLINE EXPERIENCE ANALYSIS

3.



PERFORM ANALYSIS

Investigate the experience provided by your competitors

HOW

In-Depth Analysis of competitors' website and eCommerce

- UX/UI
- Navigation
- Product Portfolio
- Tools and Services
- Checkout Experience
- Orders management
- Contents & Tone of Voice
- SEO Analysis

Customer Interviews

FEATURES BEST PRACTICES

CAR PRESENTATION | AR Presentation

On **BMW** app is possible view different model from all sides in augmented and virtual reality.

Using a photo function, the user can photograph the concept vehicle in chosen environment and then share the picture with his friends. Virtual reality enables the user to enter and explore the interior in an impressive 360° presentation.

With virtual reality glasses or Cardboard, users experience the interior in realistic 3D.

REFERENCE FROM THE MARKET

CUSTOMER JOURNEY FEATURES ENABLERS OF THE JOURNEY

List of features required for providing a premium dealer commerce experience.

1	2	3	4	5	6	7	8	9
PRELIMINARY SELECTION	NEED ANALYSIS	CAR PRESENTATION	ADDITIONAL SERVICES	REGISTRATION	QUOTATION SUMMARY	PAYMENT & CHECKOUT	DELIVERY HOME	POST PURCHASE RETENTION
Research for Model or Budget and Location	Pictures of internal and external	Trade in Estimator	Light registration	Delivery Option	Credit Card Capture/Deposit	Car @ Home		
Needs presentation (e.g. video of financial options)	Detailed description	Registration with a personal area	Trade in value resale	Payment Option (Finance/Cash)	Document Management	Dealer Pick up		
Filters	Payment Calculator	Credit scoring	Accessories and services			Tracking features (Personal areas for arranging delivery)		
Comparator	Appointment Scheduler							
360° View	Test-drive Booking							
Car Review	On-site Assistance							
CGI Advanced Demo								
AR Presentation								

Keyword	Position brand 1	Position brand 2	Position brand 3	Position brand 4	Position brand 5	Position brand 6	Search Volume
trucco occhi	9	11	39	2	41	17	22200
rossetti	23	15	2	35	4	3	14800
primer	19	20	2	6	4	8	8100
mascara	14	30	3	39	13	1	8100
blush	26	7	4	35	11	3	5400
tinte labbra	74	64	2	6	11	30	4400
contouring viso	10	18	4	1	15	58	4400
palette ombretti	15	23	1	10	9	2	3600
matita sopracciglia	65	9	1	3	20	21	2900
trucco viso	9	4	28	1	67	11	1600
mascara waterproof	30	5	13	14	42	46	1000
primer labbra	1	56	12	91	13	4	590

TRAFFIC & PERFORMANCE ANALYSIS

3.



PERFORM
ANALYSIS

Investigate competitors' performances online

HOW

• Desk Research

- **Business Performances**
Analysis of overall revenues, markets, ecommerce penetration
- **Traffic Performances**
Analysis of traffic on commerce, source of traffic, geography, device used, bounce rate etc.
- **Social Presence**
Analysis of social channels in terms of followers, engagement level, tone of voice, type of contents shared

BENCHMARKING – ECOM SELECTED KPIs COMPARISON

PLAYERS	eCommerce Share 2019	AVG Monthly Visit 2020	AVG Duration (mins) 2020
NAME	~1%	1 M	3:13
LOGO	~15%	3,3 M (7FA)	6:34
LOGO	~14%	3 M (7FA)	5:35
LOGO	~7%	500 K (7FA)	5:06
LOGO	~24%	3,5 M (9FA)	4:30
LOGO	>10%	7,5 M (703)	5:11
LOGO	~46%	36 M (148)	5:27

Sources: eCommDB, Statista, SimilarWeb Companies Financial reports Copyright © 2020 Accenture. All rights reserved. 17

Competitors' Social Pages Performances

XXX is the best performing brand especially in terms of new followers, obtaining 4.4M new ones from August 2020 to February 2021.
XXX has the highest rate of published posts.
XXX is positioned at the lowest level compared to its competitors with regard to new followers, with a monthly average of 26.3k (total between IG, Twitter and Facebook)

Brand	New Followers	Post Reach	Total Engagement	Post Published	Engagement rate
	175.8K	290.9M	2.6M	980	0.034%
	2.6M	1.8B	43.8M	1.4K	0.046%
	1.2M	829M	14.7M	1.7K	0.042%
	4.4M	2.1B	56.8M	1.4K	0.054%

Copyright © 2021 Accenture. All rights reserved. 208

SENTIMENT ANALYSIS

3.



PERFORM ANALYSIS

Investigate how the audience feels about you and your competitors.

HOW

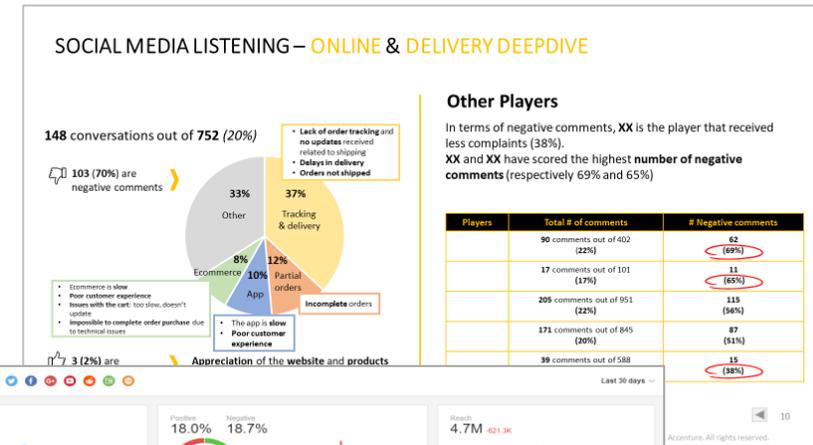
• Social Listening

Analysis of conversations on social media about your and competitors' brands.

The analysis is conducted by a dedicated AI tool which is able to extract sentiment of the conversations.

This is useful for detecting pain points of your services or your brand's perception vs competition.

• Customer Interviews



OMNICHANNEL PRESENCE & SERVICES

3.



PERFORM
ANALYSIS

Analyze the omnichannel experience and services offered by the competition

HOW

- **In-Depth Analysis of competitors' Omnichannel presence**
 - Delivery / Pickup / Returns Services
 - In-Store digitalized Services
 - App / Other digital tools
 - Online / Offline integration of services (e.g. Membership)
- **Omnichannel quality and depth of service**
 - Cost of services
 - Range of choices
 - Time of execution
 - Benefits achievable

BENCHMARKING – OMNICHANNEL SERVICES				Legend: Telephone, Chatbot, Live Chat, Email/Digital form, Social Media				
PLAYERS	CLICK & COLLECT / PICK-UP POINT	RETURNS	HOME DELIVERY	CUSTOMER CARE				
OVS	• Click&Collect / Collect & Pay – 2,90€ / FREE >20€ (5-7 days)	• 30 Days – FREE (In Store / At Home)	• Home Delivery – 4,95€ / FREE >50€ (2-4 days) Payment at Delivery 2,95€	✓	✓	✓	✓	✓
ZARA	• Click&Collect – FREE (1-2 days) • Pickup point – 3,95€/>50€ (2-4 days)	• 30 Days – FREE (In Store / At Home / Pickup Point)	• Home Delivery – 3,95€ / FREE >50€ (2-4 days) • Express Delivery – 9,95€ (1-2 days)	✓	✓	✓	✓	✓
H&M	• Click & Collect – 4,99€ / FREE for Members or >20€ (2-3 days) • Pickup Point & Locker pick-up – 4,99€ / FREE for Members or >20€ (2-3 days)	• For online only – 100 Days (holidays offer) – 2,99€ / FREE for Members • No In Store Returns	• Home Standard – 4,99€ / FREE for Members >20€ (3-4 days) • Next Day – 7,99€ (Sustainable on Milan – eScooter, bike)	✓	✓	✓	✓	✓
benetton	• Click & Collect – FREE (4-9 days)	• FREE – 14 Days	• Home Standard – 7,00€ / FREE for orders > 40€ (2-5 days)	✓	✓	✓	✓	✓
MANGO	• Click & Collect – Activated, but no further information about	• FREE – 60 Days • Returns in Store	• Home Standard – 2,95€ / FREE for orders > 30€ (3-5 days) • Express Delivery – 8,95€ (2 days) • Urgent Delivery – 9,95€ (1 day)	✓	✓	✓	✓	✓
LPP RECEIVED	• Not present in Italy	• FREE – 30 Days • No In Store Returns	• Home Standard – 4,50€ / FREE for orders > 50€ (2-8 days)	✓	✓	✓	✓	✓
next	• Not present in Italy	• NO FREE – 28 days from order receiptment	• Home Standard – 4,00€ / FREE for orders > 40€ (2-5 days) • Next Day to Store – FREE (1 day) • Standard Home – 3,99€ (1-3 days) • Next Day to Home – 3,99€ (1 day) • Next Day to Home – 3,99€ (1 day)	✓	✓	✓	✓	✓

DEFINE THE NEXT STEPS

1.



DEFINE AREA OF ANALYSIS

Setup the objective or your analysis

What's the goal of the overall research?

What do you want to improve? Which is the challenge you are trying to solve?

What do you want to learn / discover by analyzing the competition?

2.



DEFINE LIST OF COMPETITORS

Identify the competition

*Who are the ones you are competing with?
Which other industry's player are the best in class for some features?*

Market Knowledge

Desk Research:

- Financial Reports
- eCommerce Performances
- Digital/physical Presence
- Audience analysis

3.



PERFORM ANALYSIS

Analyze the competition

- **Online Experience**
- **Traffic & Digital Performances**
- **Sentiment Analysis**
- **Omnichannel Presence & Services**

- Identify the initiatives that shall be taken in consideration to address current challenges
- Define a roadmap to get them realized in a defined timeline, and KPIs to monitor results of actions.

Q&A

THANKS

