

Marketplaces

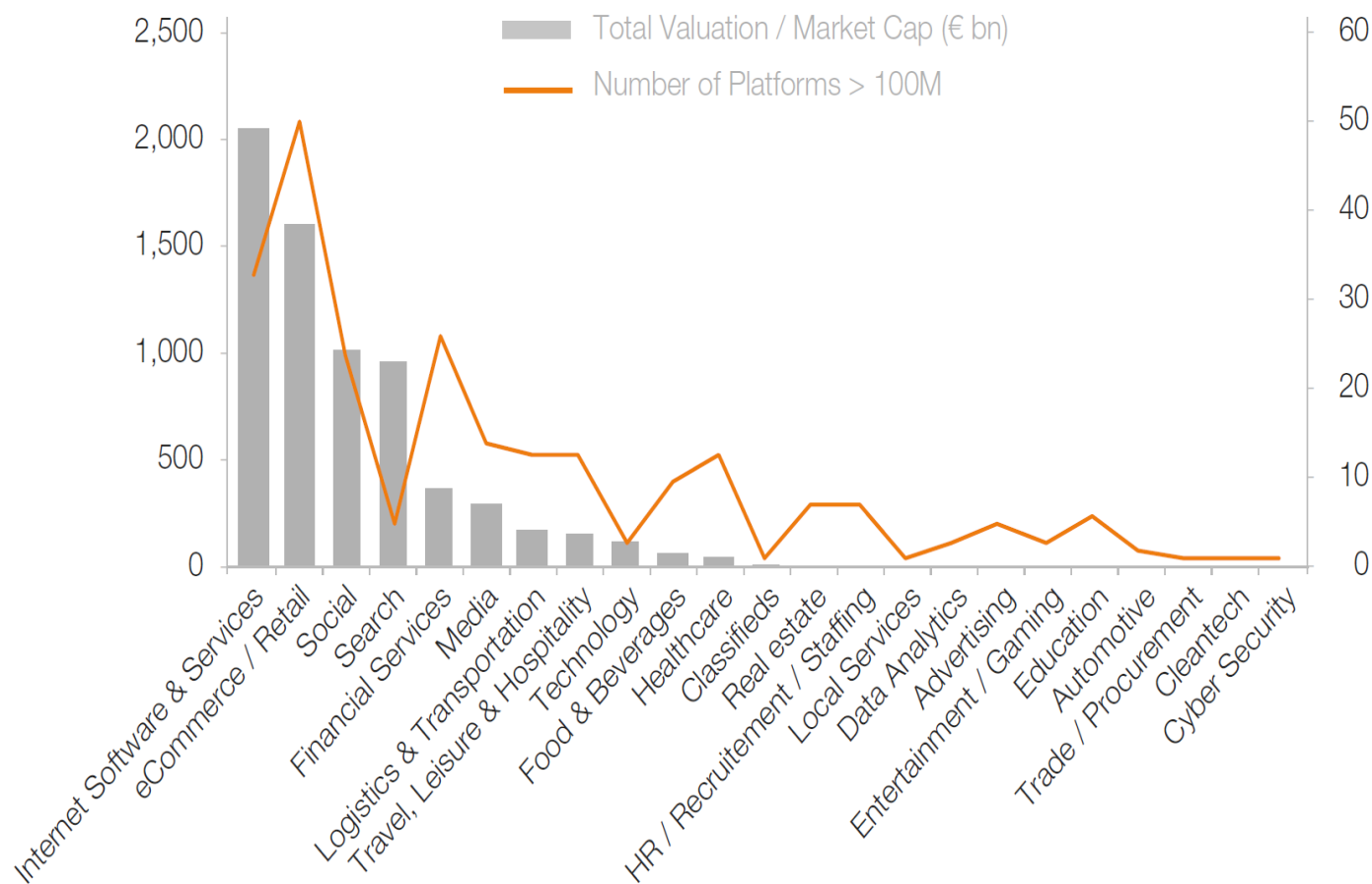
Do or die?

Piet Coelewijn

- 01.** What drives marketplaces?
- 02.** Should you participate?
- 03.** How to do that?

Platforms drive *Global value growth*

Figure 4: Global platforms by sector (incl. top seven Super Platforms)



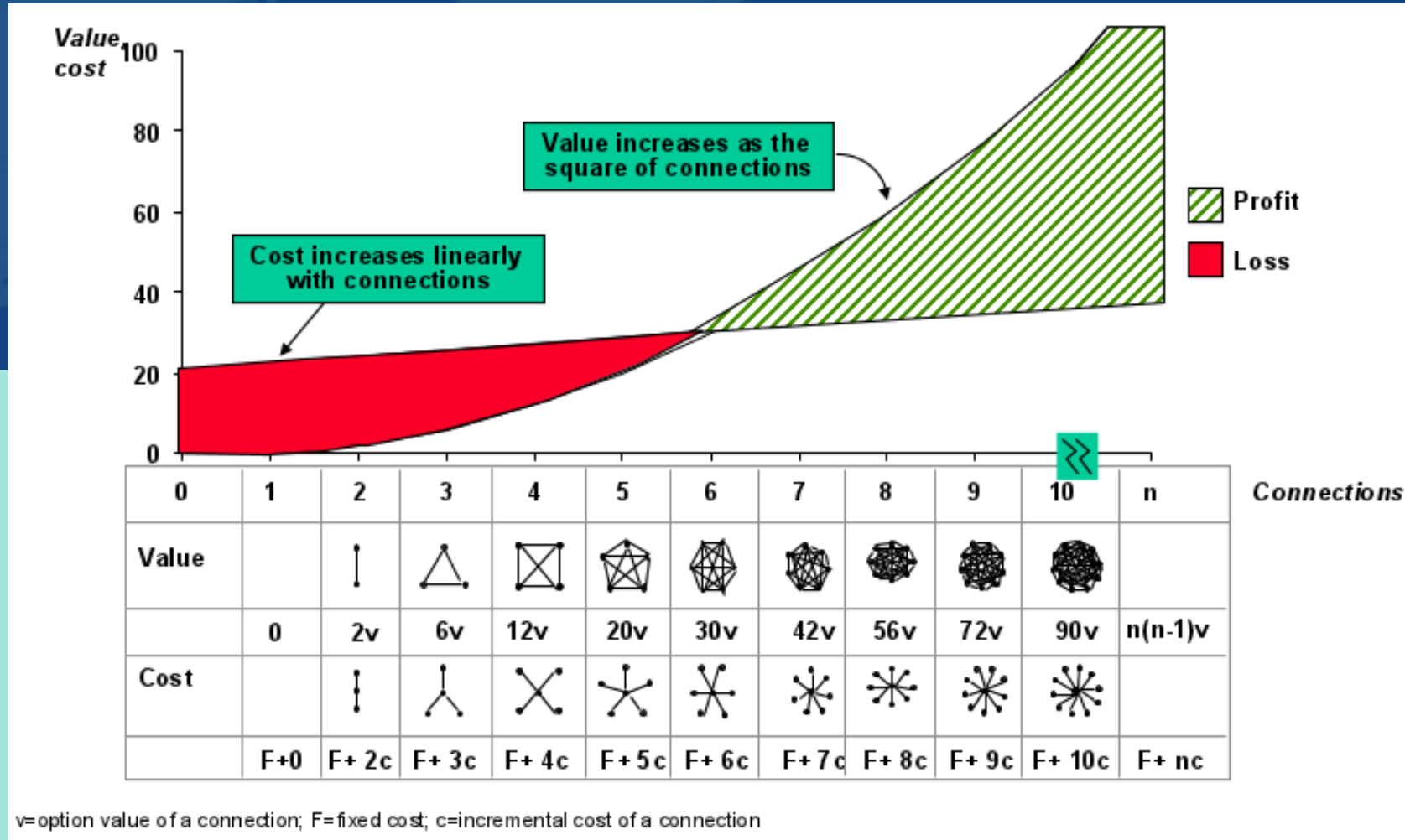
KPMG study 2018

Top 242 created \$ 7 trillion value

Top 7 = 67% of that

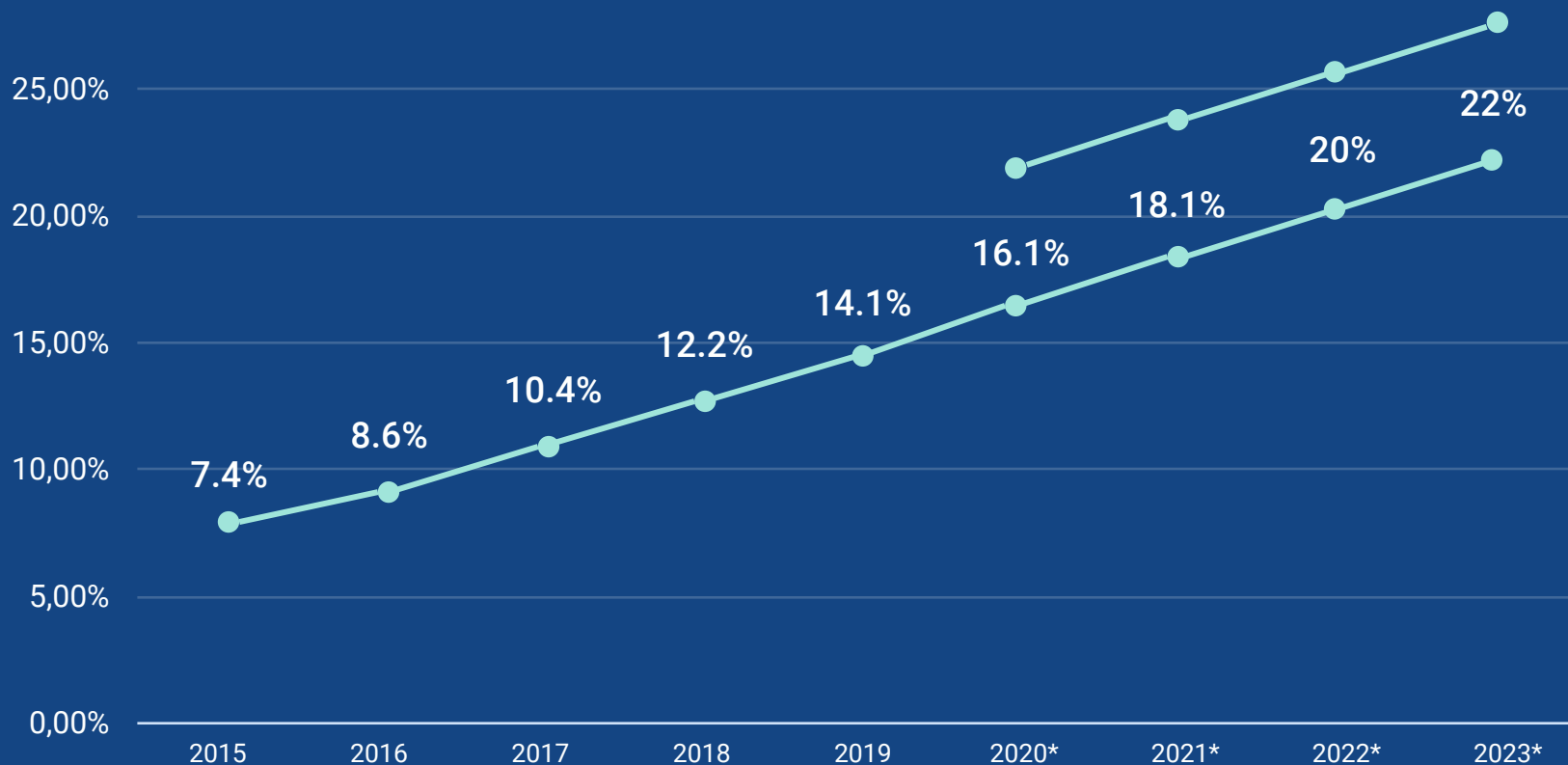
EU is only 2% of that

Platforms leverage *The network effect*

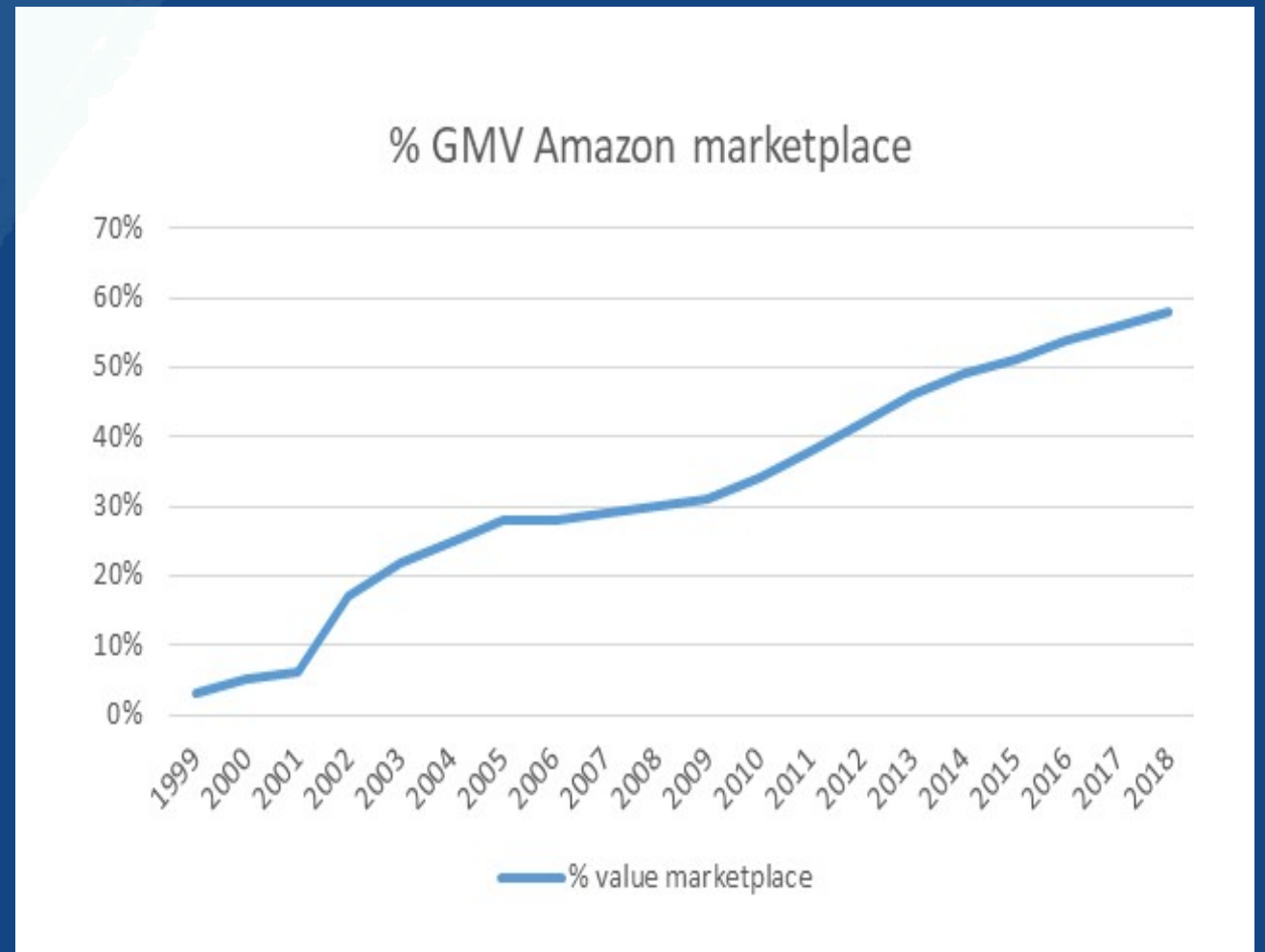


World e-commerce marketing is *steaming ahead*

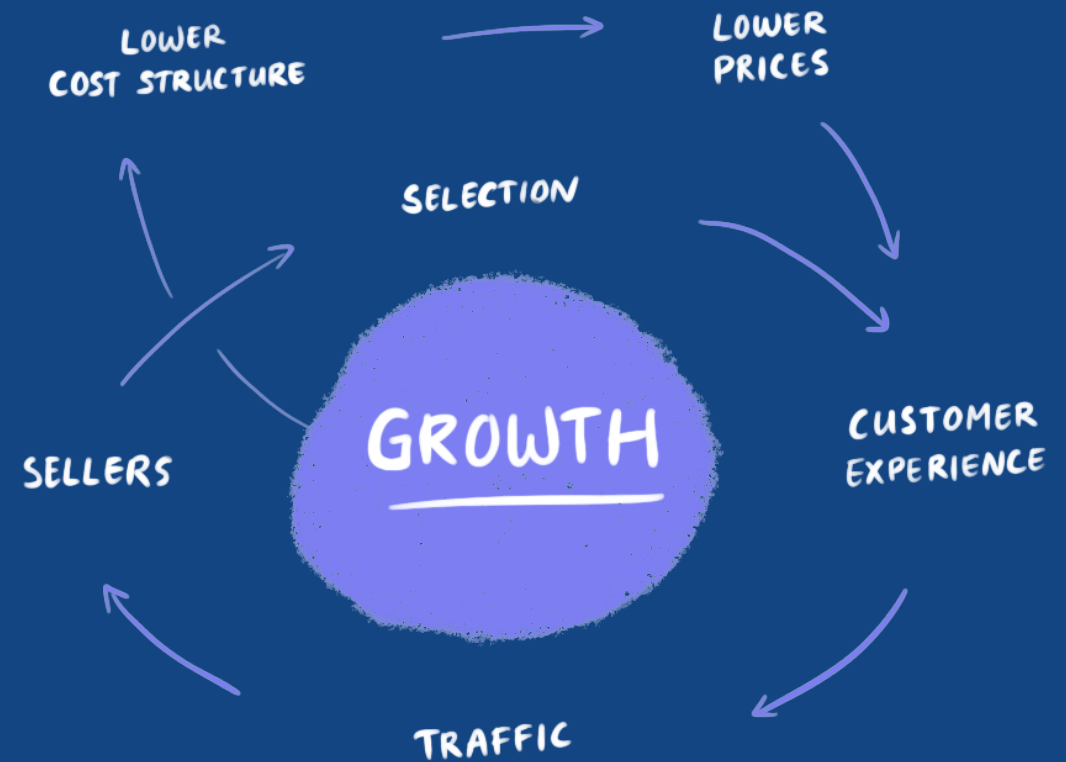
E-commerce share of total global retail sales



Amazon: The Network *Effect*



Amazon: Customer Experience; *The Amazon Flywheel*



Phase 2: Amazon consistently *consistently ahead of others (Q1 2018)*

FORESEE EXPERIENCE INDEX: RETAIL NPS & SATISFACTION REPORT

	RETAILER	CSAT	NPS
1	AMAZON	83.6	46
2	BATH & BODY WORKS	82.9	39
3	COACH	82.8	39
4	VICTORIA'S SECRET	79.6	36
5	APPLE	81.1	36
6	NIKE	80.5	36
7	COSTCO	80.6	35
8	L.L. BEAN	80.5	35
9	SEPHORA	80.0	35
10	BJ'S WHOLESALE CLUB	80.8	34
11	HOMEGOODS	80.3	34
12	DISCOUNT TIRE	81.0	34

Based on 1,000 responses. NPS scores range from -100 to +100.



	RETAILER	CSAT	NPS
1	AMAZON	79.3	28
2	APPLE	72.9	12
3	MARKS & SPENCER	74.7	12
4	DEBENHAMS	75.7	8
5	WILKO	74.9	8
6	JOHN LEWIS	74.2	7
7	BURBERRY	72.4	6
8	B&Q	73.3	5
9	NEXT	73.4	5
10	BOOTS	73.2	2
11	HARRODS	72.5	1
12	CURRYS	71.8	0
13	SPORTS DIRECT	72.3	-2
14	DOROTHY PERKINS	71.5	-5
15	TOPSHOP	69.1	-7



	RETAILER	CSAT	NPS
1	AMAZON	79.2	26
2	DYNAMITE	72.5	12
3	CANADIAN TIRE	75.7	11
4	CHAPTERS/INDIGO	76.3	11
5	REITMANS	72.6	9
6	MARK'S	75.4	8
7	THE HOME DEPOT	75.3	8
8	BEST BUY	71.8	6
9	ROOTS	72.5	3
10	SHOPPERS DRUG MART	73.6	3
11	THE SOURCE	70.7	1
12	LOWE'S	71.7	-2
13	HUDSON'S BAY	70.6	-2
14	SPORT CHEK	72.4	-6
15	WALMART	70.0	-12

CSAT scores are identical at one decimal place.



Marketplaces

Do or die?

Or

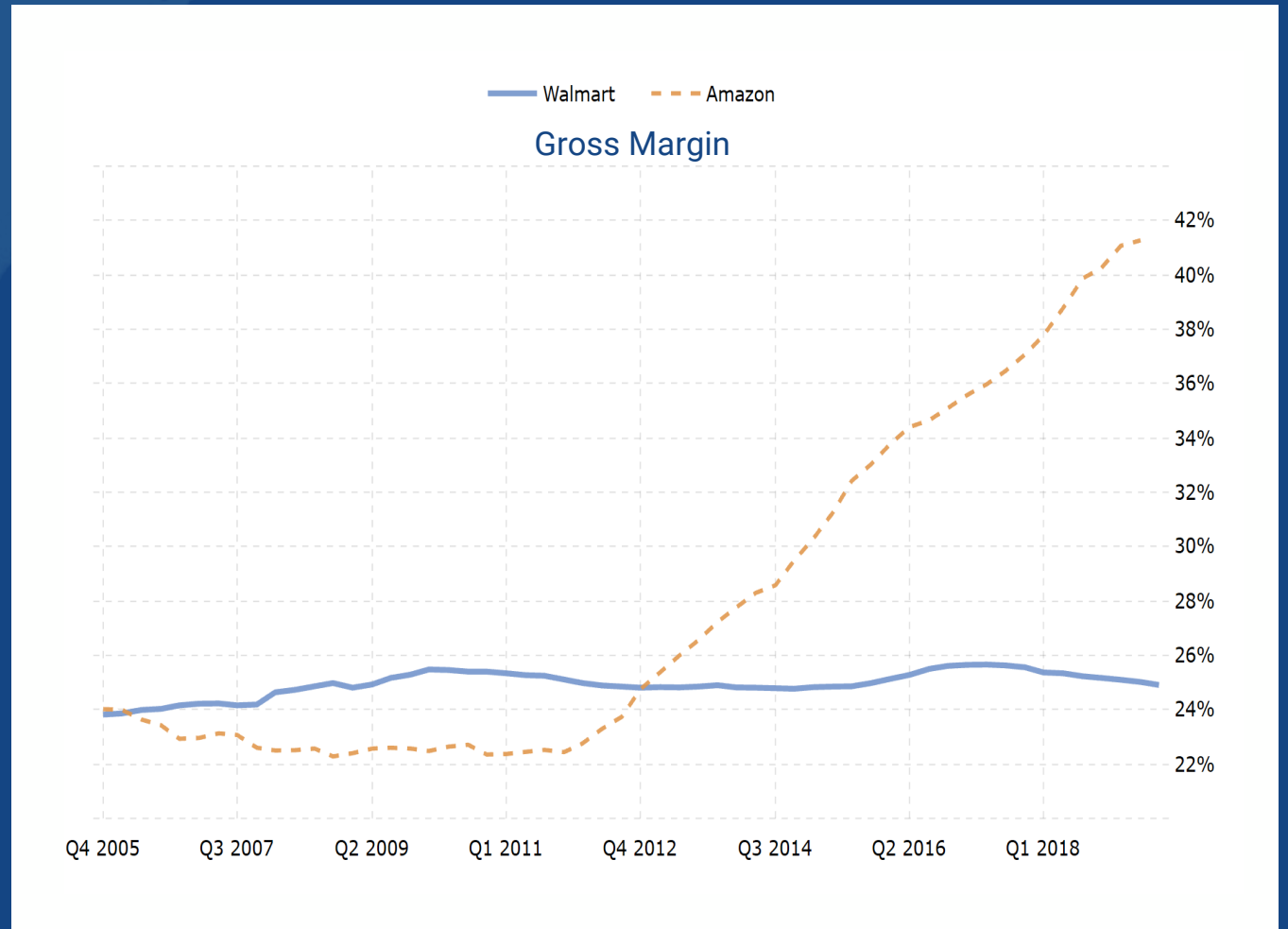
Do and die anyway?

01. What drives marketplaces?

02. Should you participate?

03. How to do that?

Amazon: The Network *Effect*









Marketplaces

Do or die?

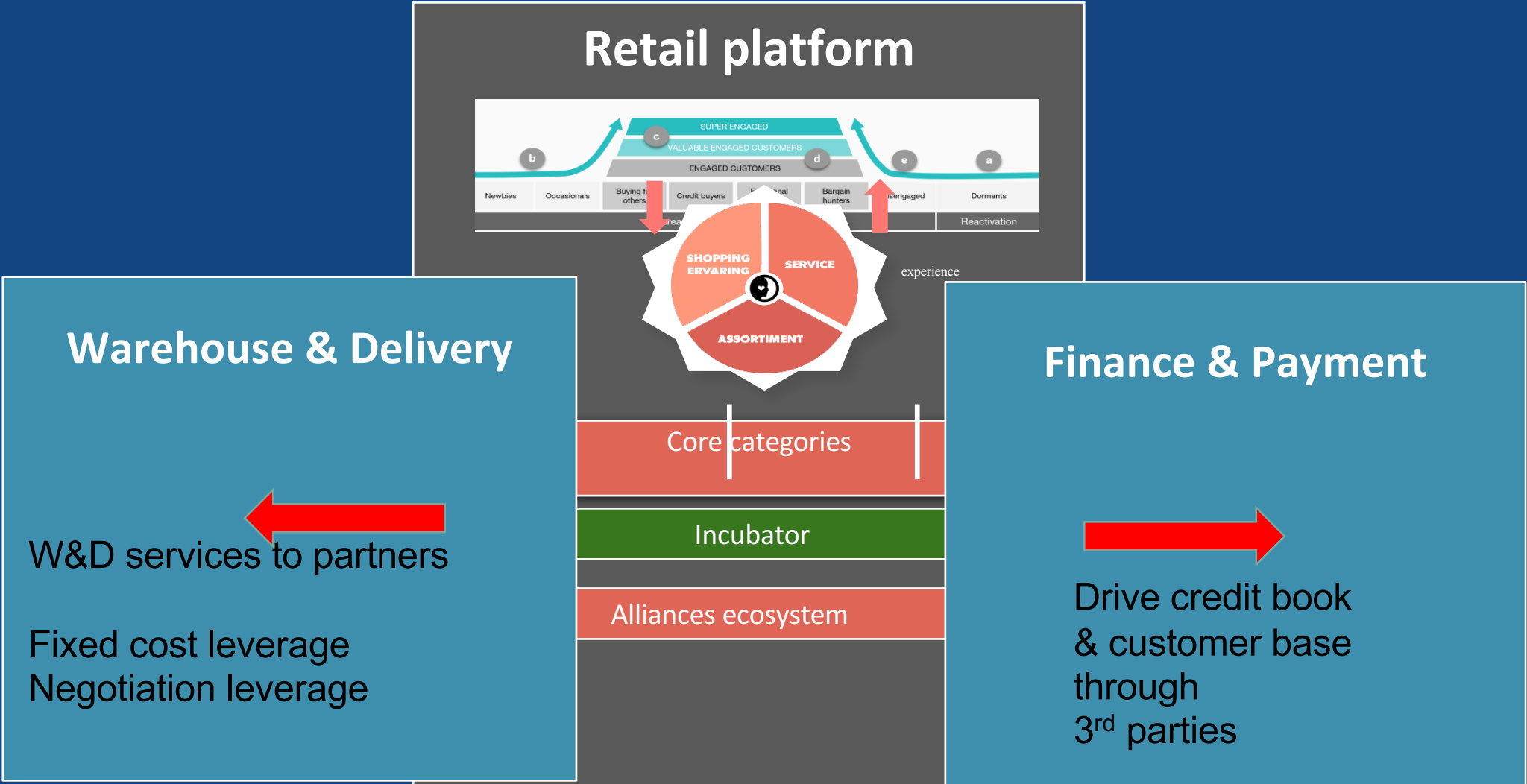
01. What drives marketplaces?
02. Should you participate?
03. How to do that?

Specific solutions for specific customers



		Solutions	
		Specific	General
Customers	Specific customers		 400 BOUTIQUES. 1 ADDRESS
	'Everyone'	 	 

Three platforms



Resumed

01. Networked businesses are taking over The world. Most of these are variations of marketplaces
02. Winner takes all. Size drives growth
03. The best customer experience wins
04. To thrive you need to drive relevant differentiation and a superior customer experience. Focusing your scope will help you to do that
05. To compete you need to design in a network effect