



# HANDELSKRAFT 2018

Moving Towards Digital Excellence

# TABLE OF CONTENTS

|  |           |   |           |
|--|-----------|---|-----------|
| <b>EDITORIAL</b> .....   | <b>04</b> | <b>FACTS &amp; FIGURES</b> .....  | <b>32</b> |
| Moving Towards<br>Digital Excellence .....                               | 05        | Digital Business Needs More Than<br>Commerce Performance Indicators ..... | 33        |
| <b>INTRO</b> .....   | <b>06</b> | Internet Use.....   | 34        |
| Make Business, not Buzzwords.....  | 07        | Consumer Behaviour .....  | 35        |
| Time for Excellence .....  | 08        | Payment Methods .....   | 36        |
| Moving Towards the Best Digital Experience .....                         | 09        | Sales in E-Commerce.....  | 38        |
| Moving Towards the Best Personalisation .....                            | 12        | The Power of Marketplaces .....   | 40        |
| Moving Towards the Best Omnichannel .....                                | 14        | E-Commerce in Europe .....  | 42        |
| Moving Towards the Best Content Commerce.....                            | 16        | Technology.....   | 44        |
| Moving Towards the Best Customer Experience ..                           | 19        |   |           |
| <b>CHANGE IS EVERYWHERE</b> .....  | <b>20</b> | <b>DATA IS THE NEW OIL</b> .....  | <b>48</b> |
| Retail is Becoming a Local Provider .....                                | 21        | Intelligence is the new Petrol.....                                       | 49        |
| B2B – Welcome to the Platform Economy .....                              | 23        | From Personal to Individual.....  | 50        |
| Silicon Valley Mindset.....  | 24        | Data Science: Advanced & Predictive Analytics ..                          | 52        |
| Innovation Management.....   | 27        | Safely Decentralised: Blockchain and<br>Smart Businesses.....             | 54        |
| New Working World .....  | 28        | Digital ID .....  | 56        |
| Running Digital – Digital Running:<br>Stay On Your Customers' Tails..... | 30        | APIs: When Refrigerators Talk to Retailers .....                          | 58        |

|   |     |
|---|-----|
| <b>FUTURE RETAIL</b> .....  | 60  |
| Internationalisation.....   | 61  |
| Example: China .....  | 63  |
| Marketplaces Reloaded .....   | 64  |
| Excite With Services .....  | 66  |
| Greetings From Logistics .....  | 68  |
| <b>BRANDS IN THE DIGITAL AGE</b> .....  | 72  |
| Successful Brands are Good hosts .....  | 73  |
| We Want What we See .....   | 74  |
| Digital Becomes Audible .....   | 76  |
| Artificial Intelligence: A Central Piece in<br>the Piece in the Content Commerce Puzzle ..... | 78  |
| Aunt Emma Strikes Back! .....   | 81  |
| Brands as Employers .....   | 82  |
| Dr. Digital.....  | 84  |
| <b>IN CONCLUSION</b> .....  | 86  |
| Digital Excellence Doesn't Exist With the<br>Touch of a Button .....                          | 87  |
| <b>ABOUT US</b> .....   | 88  |
| About Us.....   | 89  |
| Know-how .....  | 90  |
| dotSource Digital Experience Universe.....  | 92  |
| Events.....   | 94  |
| A Selection of Our References.....  | 96  |
| A Selection of Our Partners .....   | 99  |
| <b>SOURCES</b> .....  | 102 |
| <b>PHOTO SOURCES</b> .....  | 110 |
| <b>CREDITS</b> .....  | 115 |

# Editorial



Christian Otto Grötsch –  
Managing Director



Christian Malik –  
Managing Director

## MOVING TOWARDS DIGITAL EXCELLENCE

Dear reader!

Details determine digital success today, because hardly any entrepreneurial challenges are not able to be solved through the smart connection between man and machine. Purchases through voice, augmented service information in real time with sight and sound, and 24/7 bot-based support through social media. Product and additional digital benefit are no longer able to be separated.

The prerequisite for innovative digital offerings in marketing, sales, and services are high-quality data and the departure from technologically and organisationally isolated solutions to the integrated platform strategy. Commerce, product information, customer data, and content have to be taken into account across the board in order to offer users tangible added value and excellent experience across all contact points at all times through targeted personalisation and automation.

The only direction towards digital excellence: Forward!

As a digital agency, we've made consistent and successful progress in 2017, with growth to 190 employees and an increase in sales of almost 50 percent. »We digitise marketing, sales, and services« and want to be the ideal partner for our clients in 2018. With extensive business and technology knowledge, we jointly pursue the claim »digital success right from the start.«

A rising number of attendees at the Digital Business School, our Handelskraft Conference, and our Handelskraft Digital Breakfast Series spur us on to continue to network and share industry knowledge and digital visions for our employees, clients, and partners. We would like to thank our employees, clients, and partners, who, once again, made our Handelskraft trend book a reality.

**Here's to a successful and inspiring 2018.**

The background of the image is a complex, abstract geometric pattern composed of numerous overlapping triangles. These triangles are primarily colored in shades of green, blue, and yellow, creating a vibrant and dynamic visual texture. The triangles vary in size and orientation, some pointing towards the center and others away, contributing to a sense of depth and movement.

Intro

## MAKE BUSINESS, NOT BUZZWORDS

Our steps through the digital world have become secure. We seamlessly switch between the digital city center, the digital commercial and industrial area, and a networked home. Our experience is transformed from excited joy about the comfort gained to high demands on the user experience.

In order to best serve users' needs, companies are putting data at the centre of things. Customer data, product data, order history, campaign KPIs, and more. All the data is poured into tools intended to provide an excellent digital experience under the heading Big Data. Personalised and adapted to all channels. Cloud and artificial intelligence are set up as an as-a-service solution that is at manageable costs.

XaaS: Everything-as-a-service is a popular buzzword right now. That magic technological pill against digital transformation that promises short-term improvement. On risks and side effects, ask your digital agency, because XaaS is long-term as a postponement of entrepreneurial challenges of data quality, the business model, the demarcation of old and new competitors, the platform strategy, the corporate culture, and employee development rate.

Unquestionably, data and data-based information is a powerful tool that is smart to use. But behind every digital device, there continues to be people, who continued to need to be impressed by certain offers. They have a sense for the subtle differences and decide which offer they trust and which they do not.

**Handelskraft wants to show you how to achieve just this in 2018!**



Time for  
Excellence

## MOVING TOWARDS THE BEST DIGITAL EXPERIENCE

Huge amounts of data, new technology, and increasing customer expectations are forcing companies to overthink traditional concepts.

**A**rtificial intelligence, virtual reality, machine learning, virtual assistants, and much more – New technologies give us many unprecedented opportunities to take marketing, sales, and services to a new level. The integration of revolutionary technology will be indispensable in the future. Customers expect connected and personal interaction, personalised offerings, and faster and better coordinated customer service.

But why aren't we using these yet? What's stopping us?

Customers expect the technologies to find their way into the retail market and improve the shopping experience, both online and offline. But if you dismiss new technologies as some sort of gimmick, you're going to have a hard time in the future. It is up to us to develop technologies that adapt to people. We should no longer wait for progress and

ponder how it will change our lives and the way we shop – we should use intelligent systems to create highly personalised experiences that delight customers.

The first exciting ideas are already emerging in this area, whereby the possible applications are as complex as they are individual. Artificial intelligence can help create even more personalised customer experiences. VR and AR technologies can take the omnichannel shopping experience to a whole new level. Smart speakers enable voice-based shopping experiences.

Tech companies don't fool us with their daydreams and possible utopias. There are already numerous use cases for all technologies. The perfect digital experience already exists.

## SOMETIMES, IT'S THE LITTLE THINGS

For most of the latest smartphones, it's possible to open the camera with just a simple swipe, even if it's locked. A subtle moment centred around a single task: taking a picture as quickly and easily as possible.

We are already surrounded by such microinteractions, even if we are not aware of this: The ability to respond with emojis in Facebook Messenger, or with reaction buttons on Twitter and Facebook are just a few examples.

But why are these »little things« so important? Especially in industries with less differentiated product lines and a large number of competitors, the quality and originality of the user experience are gaining importance just as the products being sold.

Microinteractions help create impressive experiences by communicating status and changes, focus attention on specific areas, and/or provide feedback on completed actions.

An example of how microinteractions can be implemented in e-commerce is offered by the Romwe<sup>01</sup> online shop: If you put clothes without a size in your cart, your smartphone vibrates. On the other hand, if you add clothes with a size, there will be a blue tick.

Users will then interact more and more with their smart devices. The distribution of intelligent language assistants and chatbots offers retailers and brands completely new ways of interacting with their customers. Often, however, they still look cold, awkward, and a bit

boring. Here microinteractions enable a natural and intuitive user experience that can make machines more human-like.

The chatbot Leo<sup>02</sup>, which was developed for the business messenger Slack, asks users for example, with the help of emojis, how satisfied they are with certain aspects of their work. If Leo asks a question, he smiles; However, if you do not do an assigned task, the bot gets a bit sad. A small change that adds some personality to the bot.

- With a »click« of the burger menu  
→ elementtransform to »close«-svg (x)

- Transformation-delay:  
300ms

- When successfully logged in -> Bell Sound  
\$playSound('example.sound.mp3')



- With notification (password o. username)  
→ alert is underlaid with vibration
- vibrate: [100]?

## MOVING TOWARDS THE BEST PERSONALISATION

In a world where everything is networked, retailers are benefiting from growing amounts of data. Will individual customer behaviour become predictable?

About a quarter of German consumers are quite willing to allow retailers to collect personal data on smart devices, if that improves the shopping experience.<sup>03</sup> Artificial intelligence is already playing an ever larger role: Machines learn from interactions with data and can use this knowledge profitably.

The most impressive example of the power of a personalised product offering is from Netflix. The company was able to quickly set itself apart from the competition thanks to accurate series and film recommendations. The home page is individual for each user, and customers should be able to quickly find what they want to see. Many clothing retailers are leading by example - inspiration and personalisation are buzzwords here as well.

The sports brand Under Armour, for example, offers its customers a fitness app which, in addition to

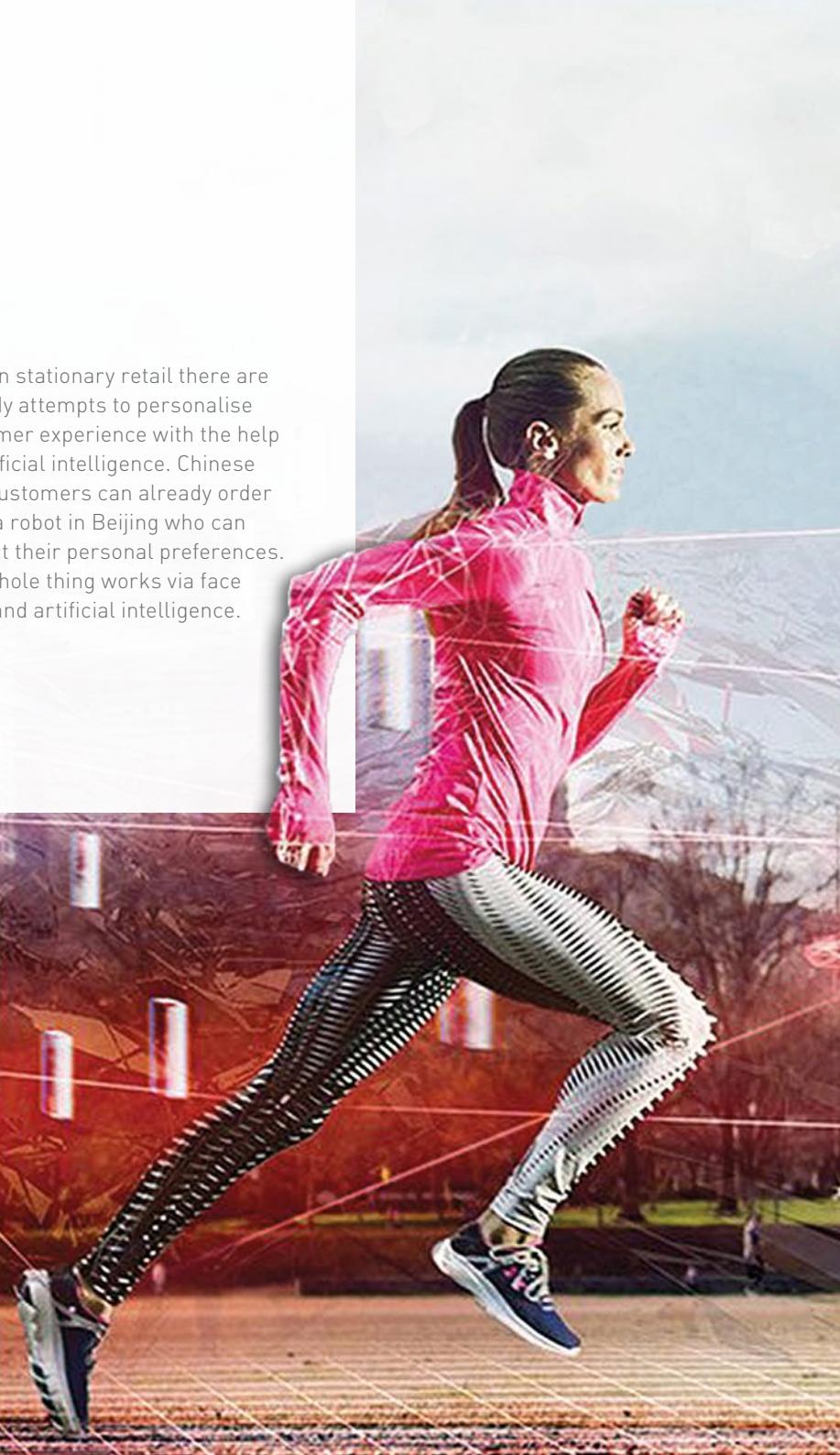
personal training and nutrition plans, encourages the purchase of new sports clothing and shoes. With the help of Watson, IBM's artificial intelligence, Under Armour can offer its customers even better service through targeted offerings. The data collected in the app can be merged with the customer's shopping history. In the future, the company will be able to identify customer needs earlier and react to them more quickly. Customers get a more targeted selection of products and an even more personalised buying experience.<sup>04</sup>

Personalised product recommendations also offer great potential in the business customer area. On the website of the bicycle parts manufacturer Messingschlager, in addition to personalised product recommendations, the photo and contact details of the supporting sales representative as well as customer-specific prices and discounts are displayed.



Virtual assistants are also being used in B2B. Staples, an American office supply retailer, has developed the easy button, which allows businesses to order office supplies by voice. With the help of artificial intelligence, the device learns the preferences of the users to take into account for the next order. The company offers customers a personalised shopping experience.<sup>15</sup>

Even in stationary retail there are already attempts to personalise customer experience with the help of artificial intelligence. Chinese KFC customers can already order from a robot in Beijing who can predict their personal preferences. The whole thing works via face scan and artificial intelligence.



Technology blurs the lines between online and offline and creates a gripping shopping experience through compelling platforms.



## MOVING TOWARDS THE BEST OMNICHANNEL

**A**t first glance, omnichannel seems to be old.

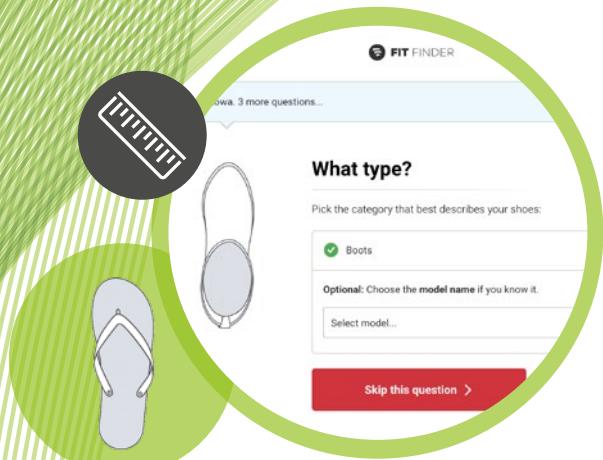
The idea of providing customers with a consistent and seamless customer experience across all channels isn't an exactly new idea. However, new technologies are also providing more and more opportunities to take the omnichannel concept to the next level and to pick up customers at each touchpoint with personalised content to give them a unique shopping experience.

**S**o far, rather large companies have succeeded, such as sneaker manufacturer New Balance. In addition to films and content about training, their website also offers tips on which shoes are suitable for which sports. From there, you go to a retail location so that you can try on shoes in store and even have a foot scan done. In addition, the sneakers can be perso-

nalised to your preferences, in the shop or online. With the app it's possible to see how the shoes are made using virtual reality glasses. New Balance creates additional touchpoints and ensures a very memorable customer experience.<sup>06</sup>

But also in the B2B area, there are promising approaches in omnichannel commerce. Krones AG, a machine and plant manufacturer for the beverage industry, offers a cross-device and personalised shopping experience with its B2B online shop. Fitters can assemble the service list for the customer directly at the customer's site using a smartphone or tablet, and the customer can then view, approve or order it at the local computer. In addition, each customer has a personal profile that is tailored to their own machinery.<sup>07</sup>

However, the trend isn't headed in just one direction. Some successful online only players are also conquering brick-and-mortar stores to meet the customer requirement for a comprehensive shopping experience. mymuesli, for example, is opening more and more brick-and-mortar stores, where customers can create their own cereals on site. Online glasses retailer Mister Spex now also uses stationary touchpoints to offer their customers a high-quality shopping experience. Ultimately, however, purely online players should only invest in stationary store presence if they will create clear added value to the existing business model.





Users want relevance and emotionally informative, as well as inspirational, content that can then lead customers to a company and a brand.

## MOVING TOWARDS THE BEST CONTENT COMMERCE

More and more advertisements are going to more and more channels, there is no longer a solution in the fight for attention. Traditional online advertising has reached a critical point. Many customers are already blind to advertising banners or simply get rid of them with AdBlocker extensions. The current trend is heading towards relevant, personalised, and contextual content. Good content grabs a customer's attention before they even decide to make a purchase. Essentially, it's about informing and inspiring potential customers. Some examples from the B2C area are recipes, tutorials, or styling and interior design tips.

Home24<sup>08</sup>, for example, provides users with their lifestyle guide with inspiration for setting up their new home. Furnishings can be simply bought by clicking on the picture. One-of-a-kind Shop DaWanda<sup>09</sup>, in turn, uses DIY guidance to get new

users. Again, at the end of the day, the goal is to discretely guide users to purchase the brand's products. The keyword here is »discretely«. For content commerce, it's all about putting the customer at the center, not the product.

British fashion label Ted Baker goes one step further and presents its products in a »360 Degree Shopable Film«. Using VR glasses, you can explore the Baker family home and shop the clothes that every family member wears.

But not only B2C companies can profit from the trend. There is also potential for content commerce in the B2B area. The products, which often require explanation, could be staged here, for example, with product instructions and videos. Craftsman shop Contorion<sup>10</sup> gives advice on different products in its blog, for example.

In the course of content commerce, another trend is gaining in importance: Artificial Intelligence (AI): It's able to analyse content and evaluate which content is the most successful. Based on these ratings, the most successful content and related content will be positioned more prominently in the future. The combination of content and AI is also promising for personalisation. Based on information about past purchases, interests, age, and gender, content can be individually suited to each visitor.

## DIGITISE ALL SENSES

Despite personalised and inspiring content, there is a crucial hurdle that still keeps many customers from buying in the online store: You're not able to try, touch, or smell products before you buy them. For this reason, new features and content formats are constantly being developed, should make it easier for customers to make their purchasing decisions.

A good example of this is the online beverage shop Rum & Co. With the help of the various flavour filters, customers can select exactly the flavours they are looking for. The comprehensive product information helps everyone to make the right and appropriate choice.

The same goes for the chocolate retailer Rausch: In the online

shop, the customer can not only buy, but immerse themselves in the world of chocolate and brand history. In addition, a diagram shows whether the chocolate tastes nutty, fruity or bitter.

At Musikhaus Thomann, on the other hand, there is something else, to literally, be heard. In the company's online shop you can hear how the different guitars sound – and how that fits in different genres of music as well. The music shop Music Store even has a video for many of the products, so that you can experience the instrument directly in action before buying.<sup>11</sup>



Providing a comprehensive digital experience is the key to keeping customers loyal to a business and over the long term continue building market share.

## MOVING TOWARDS THE BEST CUSTOMER EXPERIENCE

In times when shopping has become the norm through any touchpoint customers want to combine shopping with an emotional experience. A holistic and seamless shopping experience is essential to be sustainable in e-commerce. The big hurdle will therefore be, for online retailers in the future, to create shopping experiences with added value.

New technologies, such as virtual reality, virtual assistants, and the Internet of Things combined with artificial intelligence and machine learning, have the potential to spur customer experiences. A study by Adobe shows that customers value technically innovative brands: Almost half of Germans find it positive that companies are constantly introducing new technologies that improve the quality of the customer experience.<sup>12</sup>

Ikea, for example, is implementing this with the »Ikea Place« a VR app for smartphones. The company shows various products such as sofa, table, or kitchen lines, which the customer can combine without having to rush to the store on Saturday morning with hundreds of other customers.

Google, in cooperation with Walmart, relies on voice-driven customer experiences. Google Home allows you to easily order your food by voice.

In the B2C area, it was quickly recognised how important customers are to the digital shopping experience. It's different in B2B markets: Classic field service still plays an important role here. Nevertheless, the use of digital experiences is also worthwhile here in order to offer customers added value.

VR technology doesn't just offer great potential in the consumer sector, but can also be innovation drivers for B2B. Realistic experiences can be used to create new business models and revitalise existing ones. Cevotec, for example, uses virtual reality at trade fairs, so that customers and prospective clients can get an idea of what the production process and the production plant is like.<sup>13</sup>

Würth, on the other hand, uses IoT technologies to excite its customers. The ORSY shelf, which is available on site for many Würth customers, independently recognises stock levels and requirements and can be flexibly adapted to customer requirements with regard to order frequency and their timeline.



Change is  
Everywhere

E-Commerce is far from reaching its limits and is now entering into classic stationary sectors.

## RETAIL IS BECOMING A LOCAL PROVIDER

The combination of a wide-ranging assortment and services as well as location-independent availability make online retail more and more of efficient local provider. The boundaries between stationary and online retail are, therefore, becoming increasingly blurred.

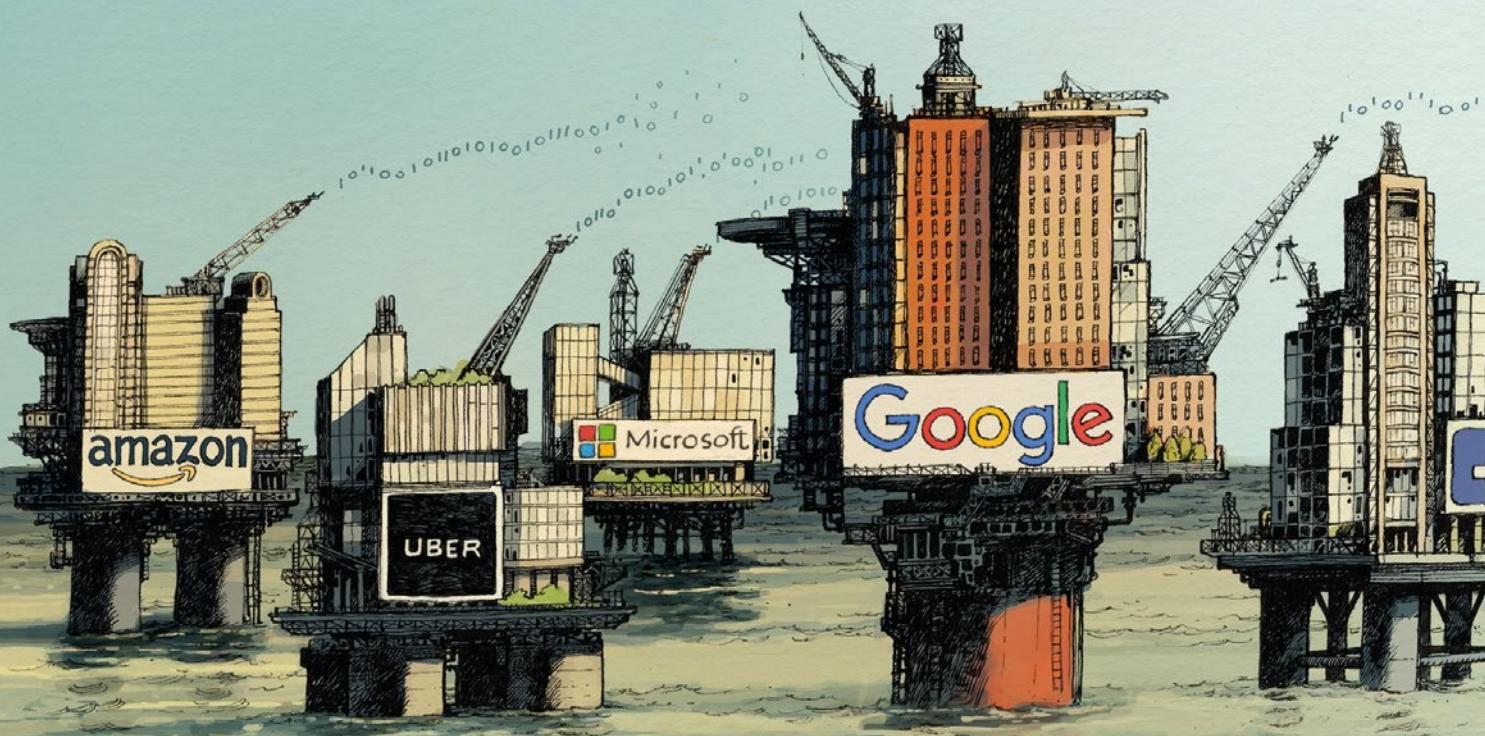
There is a lot of movement, especially in the online food market. Amazon introducing Amazon Fresh has also moved most German supermarkets and discounters to take the plunge into the e-food market. Retailers like REWE, Kaufland, and Edeka have, meanwhile, expanded their digital catalogue.

One of the main challenges for online supermarkets is logistics. On one hand, it has to meet product requirements in order to bring even perishable products such as fruit or frozen goods to a customer

without being damaged. On the other hand, the high requirements of the potential online food buyers must be met – the delivery should be as fast as possible and, above all, inexpensive.

Even though digital commerce, measured in terms of total sales, so far accounts for only a small portion of food sales, this could rapidly change in such a dynamic market.

To build market share in the long run and to add value for customers, it can be worthwhile to offer additional digital services, for example in the form of content. In its online shop, REWE has a new section called REWE »Deine Küche« full of new daily recipes, where the ingredients can be ordered directly from the recipe.<sup>14</sup>





## B2B – WELCOME TO THE PLATFORM ECONOMY

Motivated by a convenient, personalised shopping experience in B2C, the demands of shoppers for a good, unique business buyers experience are also increasing. Not surprisingly, experienced B2C players like Amazon with Amazon Business or eBay with eBay Business Supply are entering the B2B market at an increased rate.

Due to the start of Amazon Business in Germany and the associated advancement of other B2B marketplaces such as Wucato or Mercateo, the disruption of existing B2B business models is accelerating.

Depending on the industry, manufacturers and retailers may experience different potentials of a B2B marketplace strategy: Should your own products be sold on existing marketplaces or do they need to be on their own online shop? Can an existing online shop even develop a marketplace itself?

More and more B2B retailers and manufacturers are taking the step themselves and expanding their online presence into their own marketplace. An example, printing press manufacturer manroland, which has developed its B2B shop into a niche marketplace for the printing industry.<sup>15</sup>

Conrad Electronic has also recently launched its own online marketplace solution, with the aim of expanding its B2B assortment. The company is launching the first B2B marketplace for the electronics industry.<sup>16</sup>

**Have you entered the platform economy yet?**

## SILICON VALLEY MINDSET

Never before has scalability within business models quickly shaped companies to grow as big as possible to the new digital world. Foremost from Northern California – Silicon Valley has become synonymous with technology, innovation, and successful start-ups. But how can the working methods of Zuckerberg, Musk, and Bezos be used for your own company?

In principle, companies in Silicon Valley work according to three laws: Moore's Law, Metcalfe's Law, and Power Law.

Moore's Law describes the exponential growth in the tech sphere. As processor performance grows exponentially, so do industries and applications that grow and use them. Although the law originally referred to the development and growth of chip technology, it can also be applied to parallel technologies, more specifically those that demand continuous innovation. At the moment, this is being demonstrated by Tesla, where the concept is transferred to the battery power in electric cars.

Metcalfe's Law is the law of network effects. That means: A product is better, the more people use it. A clear example of this is Airbnb: The concept of the company becomes more successful the more people offer their homes on the platform.

The third law is the power law and usually occurs through the combination of the first two laws. It says that the financial and production performance of the largest company in a business is higher than that of all other competitors combined. In other words: Winner takes all. This is becoming clear to almost all successful players from Silicon Valley. Tesla, Facebook, Uber – all of them were able to oust their competitors, at least in the western world, and are the clear number one of their market.

Maybe these laws can not be applied to every single business model, but companies in this country can also adopt the thinking of Silicon Valley. However, this must be rethought emotionally, rationally, politically, and structurally: Accepting the

occurrence of mistakes is important, openness for new things and the establishment of new management methods.

Google shows how this can be done. The company provided a comprehensive insight into its leadership culture last June. On its own blog, Google offers appropriate leadership tools that are free to download. Tools available include, for example, a feedback questionnaire and an employee appraisal guide.<sup>17</sup>

**How innovative is your business?**

» **IF WE DON'T CREATE THE THING  
THAT KILLS FACEBOOK,**

**SOMEONE ELSE WILL. «  
FACEBOOK**



## INNOVATION MANAGEMENT

In particular, German companies have long perfected the steady gradual improvement of products. Thus, German automobile and chemical companies slowly but surely became world market leaders.

In recent years, however, the speed of innovation has increased rapidly. This makes it harder to make accurate forecasts for the future. In addition, a clear demarcation between sectors and business areas becomes more difficult. Amazon proves this with its transformation from an online book retailer to a provider of cloud services.

However, new innovative methods call into question central principles that are still anchored in many German companies: The prerequisite for good innovation is, for example, interdisciplinary cooperation beyond hierarchies and flexibility in decisions. That means: Company leaders have to give up some control. Because following long paths to make a decision decreases motivation and slows down employees.

One approach to fostering innovation is digital labs. The goal is to equip companies with new digital business models, innovative product ideas and technologies for a digital future. The Commerzbank spin-off #openspace in Berlin, for example, brings together SMEs and start-ups to promote innovation and support companies in digitisation.<sup>18</sup>

But for innovations to emerge in the first place, and not to be nipped in the bud, it's important to establish an error culture in the company. It must be possible to allow for failures and to consider mistakes consciously. For innovations, a free space is needed in which mistakes are not only allowed, but frankly, desired.

**Are you ready to rethink?**

## NEW WORKING WORLD

The core elements of innovative corporate culture also demand innovations in the world of work: The focus is no longer on the individual but on the team. Work processes evolve away from linear thinking and towards grinding. The workplace is no longer a place for lone fighters but becomes a flexible place for creative collaboration.

The classic design of work needs to be rethought regarding time, space, and organisation. Here, too, Silicon Valley is a pioneer and shows what the future will bring: Goal-oriented work without permanent attendance and leadership at a distance.

As an alternative to the classic nine-to-five work day, new, more flexible forms of work will become established. In the future, tasks can be solved by multiple people who theoretically can be spread all over the world. Decentralised

teams emerge situationally and dissolve again after completing their work – agile project work becomes the standard, as is crowdworking, in which a large number of people work on individual assignments.

This also means that office and work spaces will change significantly in the coming years and adapt to the more flexible work. In Silicon Valley, office architecture is far from having any facilities management, but serves as a communication tool and central element of the HR strategy. Offices are characterised by their open architecture, glass walls, and painted whiteboard walls. Even informal rooms such as lounges or »game rooms« are of great importance, since in these places, the chance to exchange ideas and collaborate with colleagues is promoted.





Already 40 percent of companies employ people who work full-time from home.<sup>19</sup> To ensure efficient collaboration, collaborative tools can help create creative ideas through messaging, video, and audio conferencing services, and project progress can be monitored at any time through project management tools. Knowledge is organized in wikis and graphics, texts, and design proposals are submitted for approval via collaborative reviewing services.

Collaboration tools are becoming more and more important in modern corporate culture. For example, »WorkPlace by Facebook«, a solution developed by Facebook for communicating with colleagues or exchanging ideas about projects – is a corporate social network, so to speak.

**How satisfied are your employees?**

As a manufacturer of marketing software and technology leader in the field of product information management and digital asset management, CONTENTSERV facilitates with its marketing content platform daily for thousands of international users working in marketing.

## RUNNING DIGITAL – DIGITAL RUNNING: STAY ON YOUR CUSTOMERS’ TAILS

The starting shot happened already quite a while back and you just keep running. You have the finish line in view and are focusing only on crossing this point. But you probably won't. Because you are in the heat of all the digitisation and in this race, the finish line is dynamic.

What does digitisation have to do with running? An example: Together with the Kenyan Eliud Kipchoge, Nike started to attempt the record to run a marathon under 2 hours. He was equipped with the latest digital technology, from training in the running lab to custom designed shoes, and had a strong team of fast-paced jumpers at his side to help him decrease the workload as much as possible. But neither his team nor the technology could do it for him: Kipchoge, himself, had to run. Did he make it? He took 25 seconds too long. He didn't lose, but rather, learned a lot.

If you combine two things in the best possible way, you will not always be the winner, but certainly never the loser: The culture, the team and the people behind it, and the technology. If you do it, success isn't far away. This goes not only for talking about sports, but also about the pathway of digitisation. How do you master it successfully?

Start with you: Get to know you, estimate your current level of training. It does not help to start a marathon and then give up completely exhausted after just a mile. Set yourself realistic goals. Then continue with the customers. Try to understand what makes them tick, what their wishes are, and stay on their tail, because they could be gone faster than you think. Use the data they give you. Collect, analyze and implement the

findings – this is your training plan for digitisation. Do not let the connection break, because if the distance between you and your customers gets too big, the competition will overtake you. And that would be fatal.





# Facts & Figures

## DIGITAL BUSINESS NEEDS MORE THAN COMMERCE PERFORMANCE INDICATORS

On the following pages you will find explanatory key figures that ideally complement this year's trend book.

The digital and the physical world are merging. Technology permeates the daily lives of private users and companies. One consequence is that e-business is no longer primarily e-commerce. Webshops give way to digital platforms that, combined with digital communication, transform the entire spectrum of marketing, sales, and service. Digital commerce is not a one-way street from the supplier to the customer, but a constantly coordinated exchange.

This development must also be followed by key figures and forecasts. Conversion rates and market potentials remain important, but are no longer enough to validate your own business. Consequently, the term e-commerce is also in the minds of decision makers competition. The new guests at this synapses carnival are called Customer Relationship Management,

Product, and Mass Data Management, Content and Data Quality, Marketing Automation, Internet of Things, and Artificial Intelligence.

The changes affect all levels of organisations, but no matter how complex digital business evolves, one thing remains unshakeable: The aspiration to meet evolving customer demands.

In order to provide a comprehensive insight, the following chapter links facts and figures on consumer behaviour, such as internet usage and payment preferences, with macro data from national and international markets. Likewise, the growing power of marketplaces as well as current technological trends are ranked with numbers.



**23%**

Percentage of Germans using video streaming services at least once a week



**274 min.**

Average daily use of the internet for 14 to 29 year-olds

2016: 245 min.



**62.4 mil.**

Germans used the Internet in 2017

2016: 58.0 mil.

2015: 56.1 mil.

2014: 55.6 mil.

FACTS & FIGURES  
**INTERNET USE<sup>20</sup>**



**30%**

Percentage of user who used mobile internet in 2017

2016: 28%



# 54.2 mil.

Amount of German online shoppers forecasted for the year 2022<sup>22</sup>

## FACTS & FIGURES

## CONSUMER BEHAVIOUR



Only

# 38%

of German smartphone users are happy with their mobile customer experience<sup>26</sup>



# 3 out of 5

(61%) Germans buy products on online pharmacies<sup>23</sup>



# Every 2nd

consumer learns about products, while they're shopping, with their smartphone<sup>24</sup>



# 42 %

of Germans can imagine a future with a robot in their household<sup>25</sup>



## Billing

is still the most popular form of payment in all German-speaking countries



## PayPal

is the most loved form of online payment from German consumers



## Credit cards

are used much more often in Austria and Switzerland than in Germany



**6.1**

different payment methods are, on average, offered by online retailers

FACTS & FIGURES

# PAYMENT METHODS<sup>27</sup>



**78%**

of 18 to 24 year-olds have already used their mobile device for payment or mobile banking<sup>28</sup>



25

Wallet processors  
active in the German  
market in 2018<sup>29</sup>

2016: 34



31.8%

of retailers are currently  
working with a payment  
service provider



23.3%

PayPal

2015: 21.4 %



20.5%

Billing

2015: 20.7%



18.8%

Credit cards

2015: 19.3%



18.3%

Debit

2015: 18.1%

amazon  
payments

7.2%

Amazon Payment

2015: 7.7%

(Mostly used by power users)

**SOFORT**  
ÜBERWEISUNG

4.5%

Sofortüberweisung

2015: 4.0%



# 12.7%

The share of interactive retailing in total retail activity in 2016

## FACTS & FIGURES

### SALES IN E-COMMERCE<sup>30</sup>



# 52.7 bil.

Amount of euros in sales were generated in 2016 in Germany solely through e-commerce

2015: 46.9 bil. euros

2014: 41.9 bil. euros

2013: 39.1 bil. euros



# 66.9 bil.

Amount of euros in total e-commerce sales of goods and services in 2016



**25.6 bil. euros**

2015: 23.6 bil. euros



**27 bil. euros**

2015: 23.2 bil. euros



**11.16 bil.**

euros in sales of clothing

2015: 10.1 Mrd. Euro



**8.74 bil.**

euros in sales of electronics

2015: 7.5 bil. euros



**3.54 bil.**

euros in sales of books & ebooks

2015: 3.6 bil. euros



**3.58 bil.**

euros in sales of shoes

2015: 3.2 bil. euros



**3.67 bil.**

euros in sales of computers/  
accessories/games/software

2015: 3 bil. euros

# THE POWER OF MARKET- PLACES<sup>32</sup>

## FACTS & FIGURES



### Every 4th

business (25%)  
offers their products  
or services in  
online marketplaces<sup>31</sup>



### 4 out of 10

see their business model  
threatened by the power of  
global marketplaces<sup>33</sup>

OMP – Online marketplaces (Ebay & Amazon)

MCV (multichannel consignor) total –  
MCV + APV (pharmacy consignor) + STV (shippers  
who are based in stationary retail) + TVS  
(teleshopping consignor)

IPP – Internet pure player

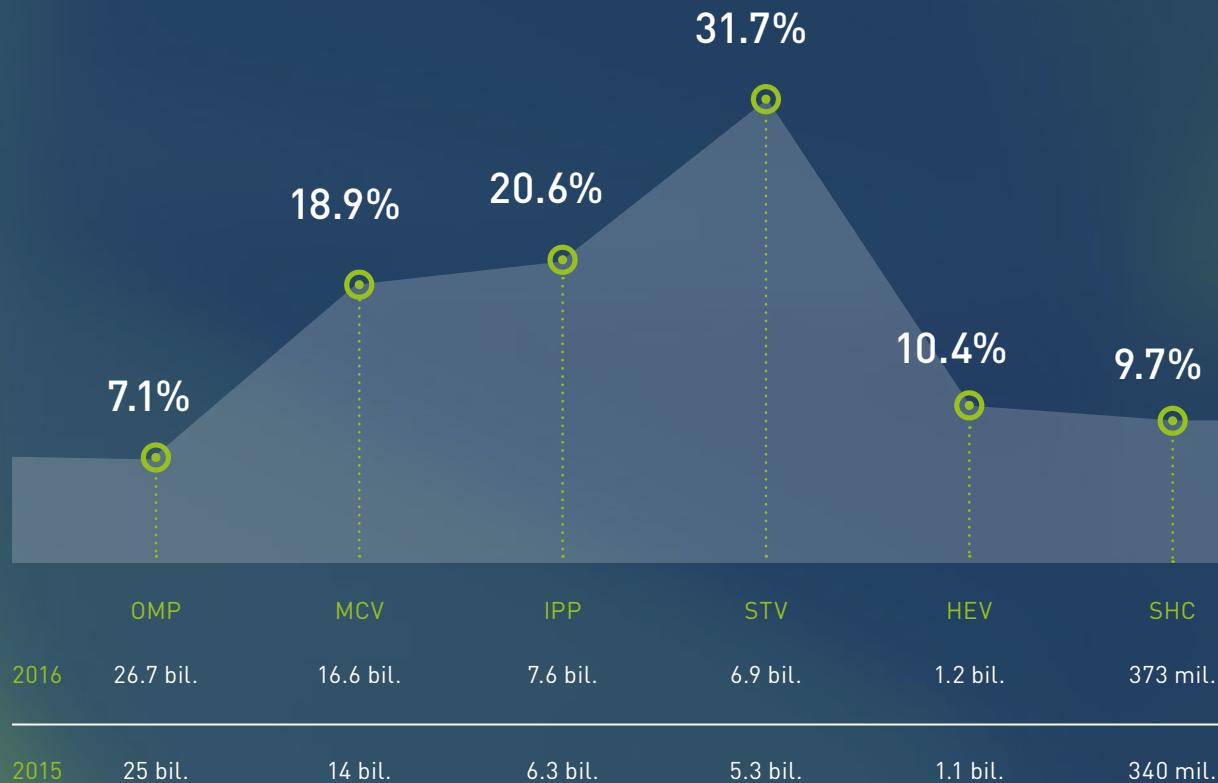
STV – Shippers who are based in stationary retail

HEV – Manufacturer-shipper

SHC (shopping clubs) – APV (pharmacy consignor),  
TVS (teleshopping consignor) and other channels

# Sales Growth by Sender Types

Total Growth in Revenue Compared to 2015 (in Euros)



An explanation of the abbreviations

used in the graphic can be found

on the left.



**77%**

of companies in Europe  
have a website – only 18%  
sell online



**631.3 mil.**

(77%) of people in Europe  
are online daily



**UK**

In the B2C e-commerce sales category, the UK is the clear leader in Europe. In 2016, the British spent a total of 197 billion euros online, compared to Germany (86 billion euros) and France (82 billion euros)

FACTS & FIGURES

## E-COMMERCE IN EUROPE<sup>34</sup>



# 603 bil.

euros in sales were  
generated in 2017 in  
European e-commerce

2016: 530 bil. euros

# 90%

of all online shoppers in  
Germany shop at Amazon<sup>35</sup>



# 61%

of purchases made in  
Switzerland in 2016  
were cross-border

Austria: 47%

Germany: 20%



## SHOP SYSTEMS

**85%**

of B2B buyers said that the search feature is the most important online shopping tool<sup>36</sup>

**5,381**

solutions were counted in the Marketing Technology Landscape 2017<sup>37</sup>

2016: 3,874

2011: 150

## About 3 out of 4

B2B online shops are internationally oriented. Of these, only 15% of the surveyed companies use their own shop system for each country.<sup>38</sup>

## FACTS & FIGURES

## TECHNOLOGY



CMS



PIM

**66.27 bil.**

US dollars will reach the global market for enterprise content management systems by 2021.<sup>39</sup>

2016: 28.1 bil. US-Dollars

**88%**

of consumers say that product content (pictures, text, videos) is extremely or very important to their buying decision<sup>41</sup>

**29%**

of marketing budgets in the US is spent on B2B content marketing<sup>40</sup>

**537 mil.**

products are available on Amazon.com<sup>42</sup>



IoT



MARKETING AUTOMATION

# 22.5 bil.

IoT devices are forecasted  
to be in use in the  
year 2021<sup>43</sup>

2016: 6,6 Mrd.

# 14.51 bil.

US-Dollars is the predicted  
sales amount of the market for  
marketing automation systems  
by 2020<sup>45</sup>

# 13 tril.

US dollars will  
be generated by total  
investment in  
IoT by 2025<sup>44</sup>

# 66%

of marketers consider marke-  
ting automation functionalities  
as the most important feature of  
e-mail marketing software<sup>46</sup>

## FACTS & FIGURES

# TECHNOLOGY



CRM

**85%**

of customer interactions  
with a company will occur  
without human contact  
by 2020<sup>48</sup>

**67%**

of marketing executives say  
that consistently shaping the  
customer journey across  
all touchpoints and channels  
is critical to a successful  
marketing strategy<sup>47</sup>

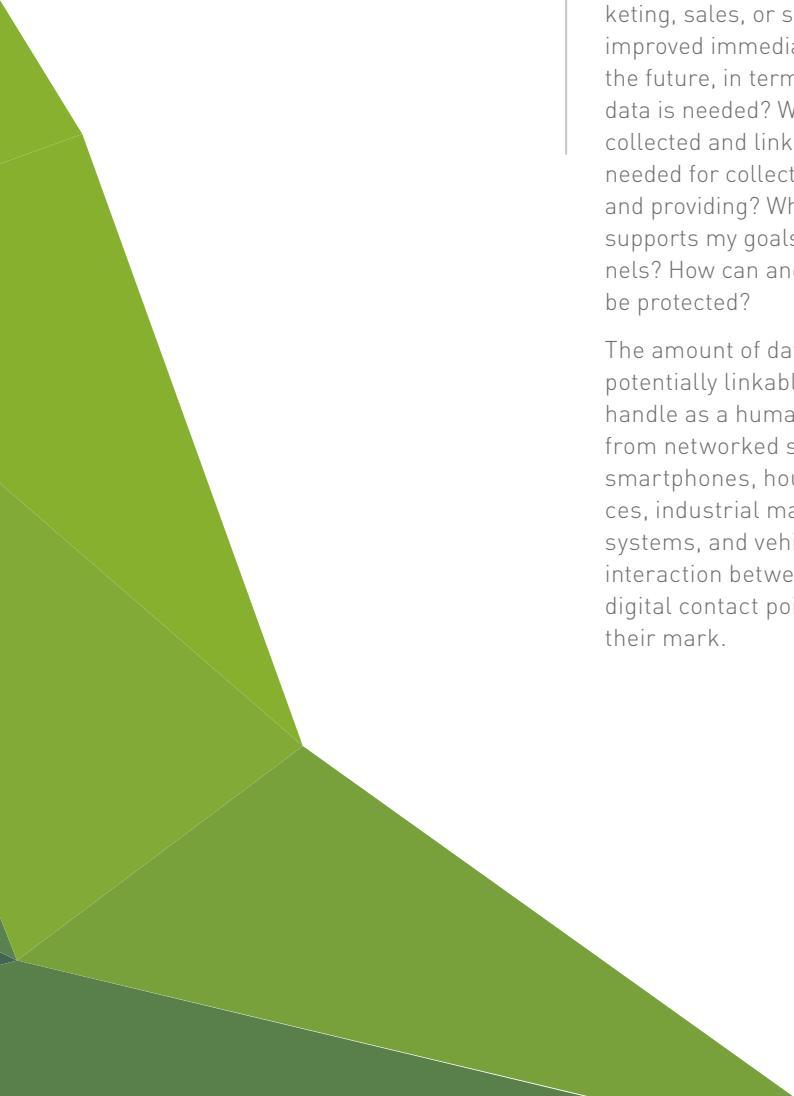
**100,000**

chatbots were available on  
Facebook Messenger in  
April 2017<sup>49</sup>

Juni 2016: 11,000



Data is the  
new Oil



Data is the new oil.  
But in contrast to global  
oil reserves, the amount  
of data continues  
to increase.

## INTELLIGENCE IS THE NEW PETROL

The prefix »data driven« poses enormous challenges for companies, regardless of whether marketing, sales, or services are to be improved immediately, or only in the future, in terms of data. What data is needed? What data may be collected and linked? What staff is needed for collecting, processing, and providing? Which technology supports my goals across channels? How can and should data be protected?

The amount of data produced and potentially linkable is too big to handle as a human being. Data from networked sensors in smartphones, household appliances, industrial machines, traffic systems, and vehicles. Every interaction between users and digital contact points leaves their mark.

In order to raise the level of data protection and make profitable use of it in an entrepreneurial way, smart machines and algorithms are needed that are, at best, self-learning. The buzzwords of the hour are machine learning and artificial intelligence.

However, business intelligence based on digital mass data requires the targeted linking of raw data. As long as existing data can not be meaningfully linked to information, even the largest data pool will not have positive business effects, but will primarily cause costs.

**Data is the new oil.  
Intelligence is the new petrol.**

## FROM PERSONAL TO INDIVIDUAL

In the digital era: What costs nothing monetarily, is paid for with data. Because users like comfort, they handle their data fairly carelessly. As long as an offer, in the end, is right, customers can look deeply into the digital ego of companies and reward their personalised customer journey.<sup>50</sup> Due to the diversity of information, the goal in marketing is often no longer personalised, but an individual customer approach.

The difference is very simple. Personalised, at the lowest level, means approaching the customer with their name to create closeness and trust. In the first extension, demographic data, such as age, gender, and place of residence, are included in the bid adjustment. In addition, the personalised address can be extended by data from the order history.

Individualisation does not differ from personalization primarily in terms of content. In campaigns, marketers continue to propose appropriate recommendations on previously made purchases or reposition goods from order cancellations. However, the individual customer approach primarily focuses on the time and channel of the contact through to environmental variables such as weather data in order to predict user behaviour.

When will a customer, most likely, open an e-mail? Why and when do they click on advertising on social networks? How important is personal contact to the brand on site? Target groups and large customer segments will be able to use highly granular user preferences that companies can use to increase their chances of success with the support of marketing automation tools.

However, distributors and manufacturers should not overburden the individual customer approach through marketing, sales, and services. For example, dynamic customer-specific prices are acceptable to customers as long as they do not realise they are systematically paying more than their friends. Even on the subject of conversations, conversation product impressions in social networks by listening digital assistants can quickly seem scary. Not everything that is technically possible returns a reward from customers!

**How do you individually address your customers?**



## DATA SCIENCE: ADVANCED & PREDICTIVE ANALYTICS

For the almost inexhaustible data pool, the term big data has become established in the digital industry. However, unstructured data remains worthless. Only through powerful analysis tools and the right know-how in the staff, large amounts of data become smart information.

Advanced and predictive analytics are more than classic reporting. In the field of advanced analysis, previously existing findings are linked. For example, if you have previously differentiated by revenue per channel, you can now determine what value a channel has for another.

Tangibly: Where initially the store, web shop, and app were considered separately, it is now possible to determine how large the service volume in the store is for web shop

customers and what up-selling potential exists. The latter cognitive interest already falls into the field of predictive analytics, the data-driven forecasts.

However, this kind of business intelligence requires an agile technical infrastructure, access to data sources, and excellent data quality. 35 to 45 percent of companies still fail here, although more than 90 percent of retailers and almost 70 percent of the service sector say they would benefit from such analyses in the future.<sup>51</sup>

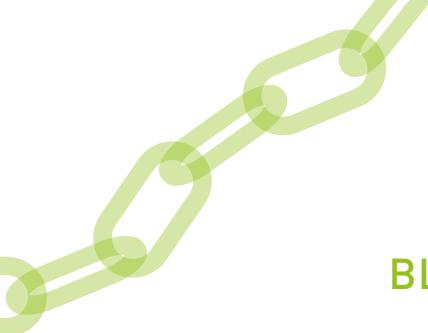
In search of data summoning, the so-called data scientists and personnel quickly reach their limits. On one hand, the number crunchers require a broad skill set, from the ability to process data through mathematical understanding to technical

knowhow. On the other hand, strong communication skills are required to mediate between IT, departments and business decision makers.

The development of your own business into a data-driven business also requires a corporate culture that can cope with rapid changes in course. The benefits, such as better market and competitive understanding, efficiency gains, and the proactive development of new business models, are obvious.

**How advanced are your business analyses?**





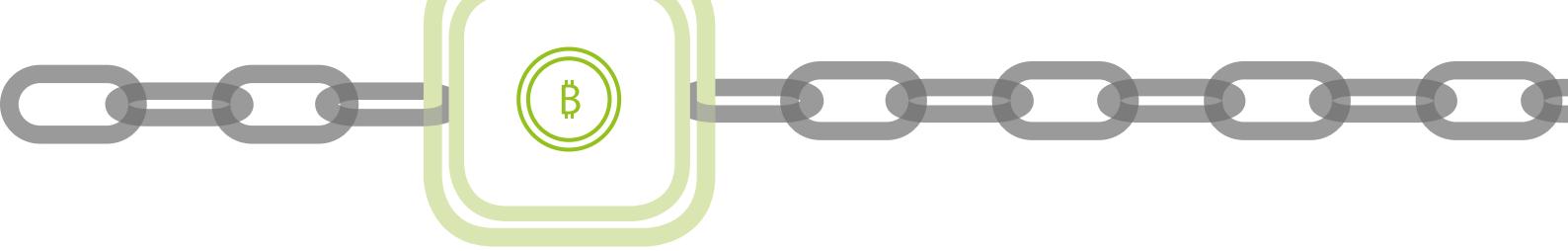
## SAFELY DECENTRALISED: BLOCKCHAIN AND SMART BUSINESSES

On May 25th, 2018, the EU General Data Protection Regulation (EU GDPR) enters reality EU-wide and without exception. Users should become master of their data again. What some celebrate as a milestone<sup>52</sup>, others are calling the greatest catastrophe of the 21st century.<sup>53</sup> The fact is that companies have to deal with it quickly, so as not to be financially ruined by costly penalties.

But not only since data is processed in digital form, organisations have to deal with the issues of data security and privacy. The question of where data is stored is business-relevant and kicks providers of cloud solutions with regularity from the list of business decision makers. Familiarise yourself with your own IT at your own business.

In German-speaking countries, there are therefore an increasing number of solutions that operate as a German Cloud<sup>54</sup> or Cloud made in Germany.<sup>55</sup> Microsoft<sup>56</sup> also has an available option. Contrary to the global trend, security concerns in Germany are also falling after the attacks on corporate infrastructure by the malware WannaCry<sup>57</sup>, which encrypted the affected computer and released it only for a ransom.

Protecting IT against attacks from outside is costly and can only be part of the solution. The other part could be decentralised data security, as offered by the blockchain.



In simple terms, the blockchain can be understood as a chain of data records that is managed and calculated by all network computers. Deleting or corrupting data is impossible because the difference to the original would be detected. The best known uses of the blockchain are cryptocurrencies like Bitcoin.

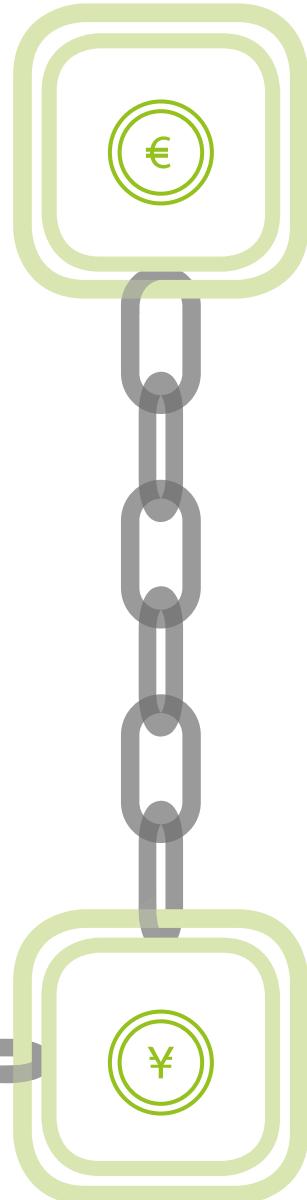
In particular, digital retail should have the alternative payment systems on the screen. For example, YouTube and Apple are considering the licensing of Musicoin, a special cryptocurrency for music products, as a form of payment.<sup>58</sup> The advantage lies in the ability of smart contracts, so non-corruptible actions and reactions that no longer need a middleman to enforce.

Specifically, what sounds cryptic means that, for example, rental apartments with Wi-Fi locks automatically grant access when the booking has been paid. Handover of keys and the risk of not being paid are a thing of the past.

Start-ups like slock.it<sup>59</sup> want to revolutionise the sharing economy for apartments, cars and much more.

Encrypted one-to-one contracts can push entire business models, such as the exploitation of rights by GEMA, from the market.

**Which smart contract secures your sales?**





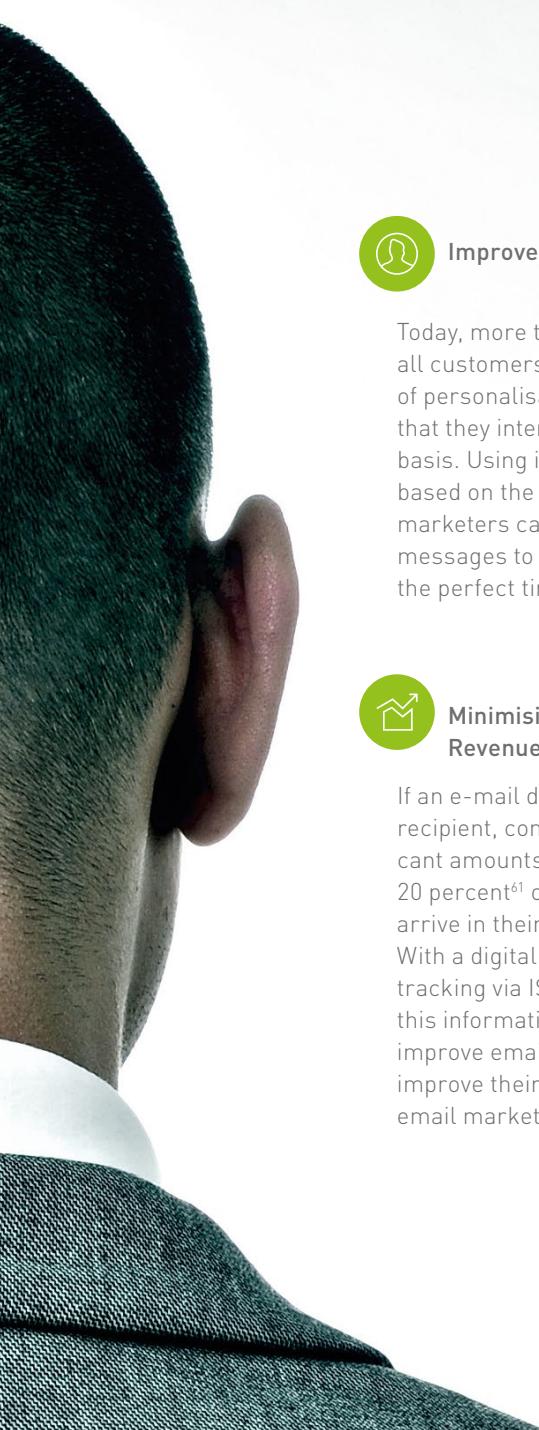
Emarsys is the world's largest independent marketing platform company whose solution enables personalised one-to-one interactions between marketers and consumers across all channels.

## DIGITAL ID

Excellent omnichannel marketing is a challenge. But already with e-mail, the right path for success can be travelled. Why? Because this marketing channel uses a unique identifier that customers use for a variety of things: Their digital ID

The digital ID of a customer is simply their e-mail address: It is one of the most commonly used user identifiers to verify customer identity. For marketers, the digital ID has three concrete effects:





### Improved Personalisation

Today, more than 73 percent<sup>60</sup> of all customers want some degree of personalisation from brands that they interact with on a regular basis. Using integrated profiles based on the Digital Customer ID, marketers can send personalised messages to their customers – at the perfect time for the customer.



### Minimising Loss of Revenue

If an e-mail does not reach the recipient, companies lose significant amounts of revenue. In fact, 20 percent<sup>61</sup> of all e-mails never arrive in their designated mailbox! With a digital ID of a user, a tracking via ISP is possible. With this information, marketers can improve email deliverability<sup>62</sup> and improve their revenue through email marketing.



### More Comprehensive Targeting

Customers use their digital ID for more than just their e-mail traffic. If a customer does not respond to e-mail, marketers can use their digital ID to switch to other, possibly more promising, communication channels. The captured data, which is part of a digital ID, can be used to create holistic profiles,<sup>63</sup> that enable companies to better align their interactions with their customers over time and make them more effective.

The digital ID is the most important starting point for excellent omnichannel marketing. As more data is collected over time, the more information brands have about their customers, information that can be used for consistent, personalised brand interactions<sup>64</sup> across various channels.



commercetools is an international technology company and is regarded as an incubator for the post-webshop era. Its cloud platform creates the basis for a sustainable retail strategy

## APIS: WHEN REFRIGERATORS TALK TO RETAILERS

Do weekly shopping by voice; get the perfect outfit recommendation from a chatbot; try a new chair in a virtual space: Today's customers want to be addressed and inspired in different ways and expect the best possible service. Welcome to the post-webshop era where new devices such as smart and voice devices, wearables and the Internet of Things are available to customers anywhere, anytime, listening to the desires – and the classic webshop steadily loses its importance.

What customers ask for, providers should provide. The solution for the latter: All Purpose Interfaces (API). What sounds like programmable toys in the first place, are actually the only way to keep up with ever-changing customer needs. These APIs – usually high-performance and highly scalable hosted in the cloud – allow seamless communication between hardware and software. In practice, this has many advantages: Manufacturers, for example, stage their brands very flexibly on

the widest range of touchpoints and quickly integrate new devices in order to create smart shopping experiences for their customers. The cloud: An API interface does not care if an order is triggered by a classic webshop, mobile app, voice device, chatbot, or augmented reality glasses. These devices are interchangeable, because the technology with which users communicate – touch screen, microphone, cameras – is consistently separated from the downstream processes. For providers this means: The backend stays the same, only the frontend technology can be variable – and does not have to be limited to pixels on a screen.

Retailers and manufacturers use APIs to integrate the terminals of the future, work on innovative business models and quickly bring them to the streets. And are relaxed even when finally the famous networked refrigerator becomes reality and ordered a weekly ration of whole milk.





The background of the image is a complex, abstract geometric pattern composed of numerous triangles. The triangles are primarily a bright lime green color, with some darker green and blue ones interspersed. The pattern is dense and organic, creating a sense of depth and movement. The overall effect is modern and minimalist.

# Future Retail

Anyone who also wants to succeed abroad must be able to see the complete picture of the market in their target market.

## INTERNATIONALISATION

The success of the online retail doesn't stop at national borders. According to the 2017 European E-Commerce Report, sales will exceed \$600 billion at the end of the year, a growth rate of nearly 14 percent compared to 2016.<sup>65</sup>

This also favours cross-border e-commerce: In 2016, 33 percent of European online shoppers bought something from outside their own country. If you want to open up a new market as a retailer, it's worth evaluating different channels and their local characteristics. Local laws, bureaucratic hurdles, technological conditions, language barriers and cultural differences, payment processes, and logistics are usually the biggest challenges to overcome.

For those who don't want to set up a localised version of their online shop, marketplaces like Amazon, eBay or Alibaba offer an option for internationalisation.

This makes it easier to find out which items are selling in each country with less effort and less risk. Here, in addition to the large platforms, smaller country-specific marketplaces can also be set.

Sales – whether national or international – must remain clear and efficient across all channels and national borders. This requires multichannel software that is up to international challenges, correct and complete product data and comprehensive customer service.

A customer probably won't become a regular if their delivery takes too long, the customer service is insufficient, or there are incomprehensible problems in the case of a return. Anyone who also wants to succeed across borders must be able to see the biggest possible picture of the market in their target region.



## EXAMPLE: CHINA

If you look into the digital future of the west, you just have to look to the east – more specifically – towards of China. If one has previously accused the companies from the far east of copying western technologies, then the tables have turned.

Far eastern companies such as Alibaba, Baidu, and Tencent are trendsetters and are serious competitors for Amazon, Facebook, and Google. Although based on western technologies, they have been continuously developed and extended to other business areas. In the meantime we can look at something from China. One trend stands out in particular – in China, people no longer rely solely

on »Mobile First«, but now on »Mobile Only«. People in China almost exclusively use their smartphone. This is mainly due to the messenger app WeChat by Tencent.

Whether sending private messages, transferring money, reading news, or shopping – WeChat is everything. E-commerce providers handle orders, payment transactions, and customer support via the app. The app functions more as a service platform and less than pure messenger. WeChat is used as if it were a separate operating system.

Western platforms are also experimenting with different additional services for their messengers.

For example, WhatsApp also introduced a business version of its messaging service last year to facilitate customer-business communications<sup>66</sup>. But, many users are still used to using desktops and laptops. But at least with a new generations of users, this behaviour will change. Anyone developing a product today that will be primarily used by people under the age of 25 should rely on the format of »Mobile Only«.

**What can your business learn from China?**

## MARKETPLACES RELOADED

A few years ago, topics such as verticalisation or direct sales, which retailers and manufacturers used, increasingly escalated the importance of how to deal with the trend of »platform economics« and which strategy is the right solution.<sup>67</sup>

The advantage of enormous empire-wide visibility is, at the same time, opposed to the dependence on digital retail centres. Although platforms offer high-quality social targeting and reliable fulfilment, all customer data is also stored at the marketplace.

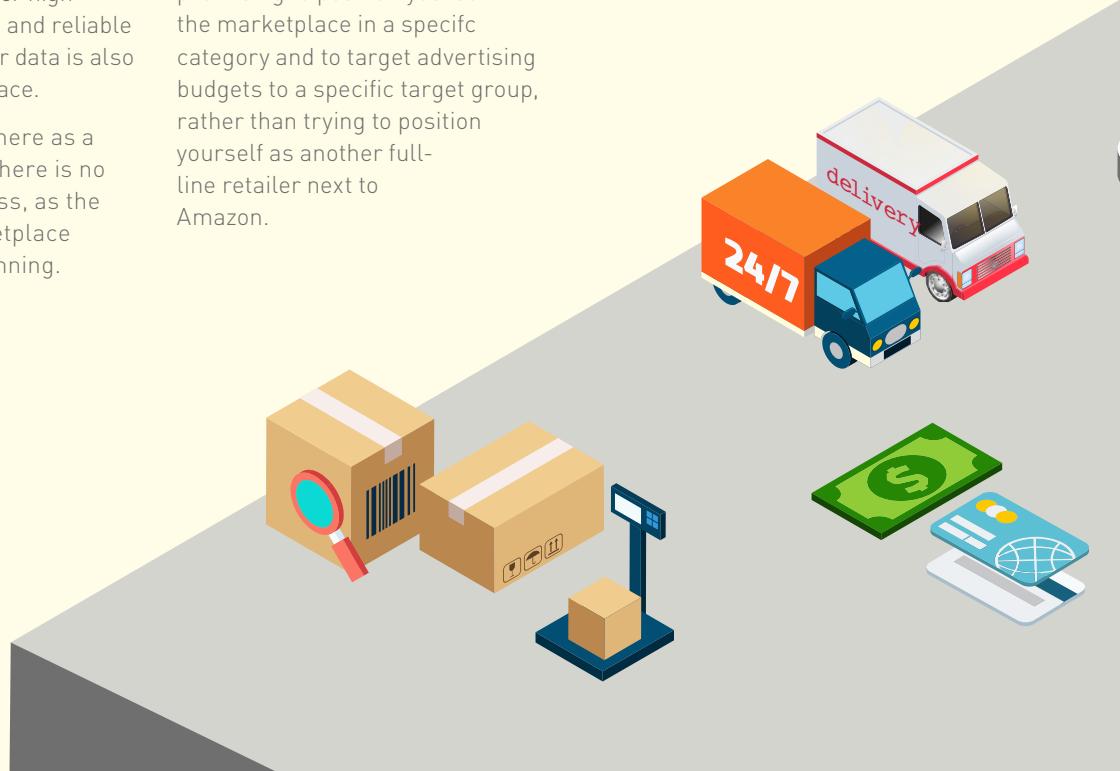
Finding the right way here as a provider is not easy. There is no clear recipe for success, as the development of marketplace strategies is just beginning. Some providers are successful with just a

pure marketplace concept, others put in an additional, or independent, online shop and, still, others themselves become the marketplace.

In order to run your own marketplace, a certain range and brand awareness is necessary, since, you're already starting with a large range of products and many retailers should, therefore, be integrated. In addition, it is more promising to position yourself with the marketplace in a specific category and to target advertising budgets to a specific target group, rather than trying to position yourself as another full-line retailer next to Amazon.

For many, even larger retailers, it may therefore be better to use existing marketplaces. There must be a focus on which platforms are served with which products.

Omnichannel scenarios, which still serve marketplaces in addition to their own sales channels, are very complex and should be tackled piece by piece.





To operate completely without a marketplace, and thus, to be much more flexible and to gain access to valuable customer data, unique selling points are needed. What added value does your company's digital presence offer in terms of service, content, and user experience?

Retailers  
who

want to position themselves need to offer a unique shopping experience.

**What added values does your digital interface offer?**

## EXCITE WITH SERVICES

Comprehensive customer service is already a must in order to keep up in the highly competitive e-commerce market and prevail against customers loyal to Amazon. There are many new technologies that can help to put an end to the nightmare of call centres and queues.

Chatbots who incorporate artificial intelligence are among the most promising technologies in this field. Gartner's studies<sup>68</sup> even predict that by 2020, 85 percent of all customer interactions will be handled through artificial intelligence and chatbots.

Many companies are already using these technologies to make customer service faster and more efficient. For example, with Facebook's »M« technology, it's possible to buy products, book flights, and even transfer money via messenger.<sup>69</sup>

According to Gartner, the use of new audio technology such as Amazon's Echo, Google's Home,

and Apple's HomePod will become the new normal. By 2020, 30 percent of all web interactions will be done without a screen.<sup>70</sup> This offers a potential for voice-based customer service in e-commerce. In direct contact with the customer, purchases can be made or targeted purchase recommendations can be given – at any time.

In the future, companies could even solve their customers' problems before they contact customer service. What sounds like a science fiction movie, is already being tested: Saffron<sup>71</sup>, a subsidiary of tech giant Intel, has developed an AI that has up to an 88 percent accuracy and can predict on which channel and for which product a customer will ask for help.<sup>72</sup>

**Are you fulfilling the wishes of your customers?**





## GREETINGS FROM LOGISTICS

In addition to an individual and special shopping experience, customers want one thing above all else: To hold the items they saw and ordered online in their own hands as quickly as possible. In times when you no longer just order electronics and shoes online, but also eggs, milk, and other goods, the expectation for a quick and uncomplicated delivery has continued to increase.

Companies and logistics service providers are working on different solutions to deliver products as quickly as possible. It doesn't matter if it's cars, drones, or robots: They are constantly researching alternatives to the classic last mile, i.e. personal delivery to a customer's front door.

Amazon is increasingly striving to expand its own supply network and is thus competing with DHL and others. After Aldi and Shell, the company is now also cooperating with dm, Edeka, and O2, thus expanding its own parcel network. Amazon<sup>73</sup> has also unveiled a household pickup station in the US called »The Hub«<sup>73</sup>.

Furthermore, the mail order company has been working for a long time on delivery with drones.<sup>74</sup> In the future, Amazon also wants to rely on containers that house a system that repairs and maintains the drones. These containers should in turn be placed on trains, boats or trucks; Amazon saves, among other things, the money used for higher rent in urban centres.

Amazon isn't the only one working on alternative delivery methods. For example, DHL wants to bring 3D printing, production, and logistics closer together.<sup>75</sup> Complex and custom parts could be produced on-demand and printed on the way to the customer. This technology is particularly interesting for service offers and repair services.

Nerdys Pizza<sup>76</sup>, a delivery service start-up, also focuses on completing the product on the way to the customer. Only parts aren't being put together to build a reusable product, but rather, fresh pizza! In contrast to conventional delivery

services, the unique delivery vehicles have an additional seat and workplace with a stone oven in the rear of the vehicle.

If your delivery is via the parcel service DPD<sup>77</sup>, autonomous driving should also play a decisive role in parcel delivery in a timely manner. Automated vehicle technology should help with package delivery and could, in the long term, enable a completely new level of flexibility.

**How fast is your delivery to customers?**



## FUTURE PAYMENT

According to a study by industry association Bitkom, more than half of all Germans can imagine paying almost exclusively cashless in the future.<sup>78</sup> The acceptance of alternative payment methods is increasing, but is not really widespread in Germany just yet. However, approaches already exist: Deutsche Bank has offered its customers, since April 2017, a feature to pay via smartphone with their Mastercard.

In terms of payment, it's once again worthwhile to look at China: In particular, smaller transactions, such as at food stalls or in stores, are carried out with Alipay or Tenpay (the virtual wallets of Alibaba and WeChat). This happens via QR codes, which are available at every booth.

Alibaba goes one step further and is already testing payment via face recognition – »Smile to pay« allows customers to authorise payments with a face scan and then entering their phone number.<sup>79</sup>

Even in the US, Fitbit smartwatch users can leave their wallets and smartphones at home, as they can easily pay directly with their wearable wherever contactless payments are accepted.

In Germany, WhatsApp could create a cashless payment solution and make them more attractive due to its enormous reach. Rumor has it that Messenger<sup>80</sup>, is already working on a »WhatsApp Payments« feature. This could allow users to transfer money to friends or pay cashless in shops via WhatsApp.

### How smart are your payment methods?



From trend to reality: In 2015 Jack Ma imagined a world that had a feature called smile to pay. Since 2017, KFC customers in China can now pay by face recognition.



# Brands in the Digital Age

If customers aren't comfortable where they are, they'll find somewhere where they are!

## SUCCESSFUL BRANDS ARE GOOD HOSTS

When companies think about their customers, the obvious truth is as secure as Fort Knox. The customer is the king. The customer is always right. You have to serve the customer. This enormous respect isn't just because the customer is a sales guarantor, but because you know your products are an easy sell.

Like good hosts, retailers and manufacturers now strive to meet customer requirements in marketing, sales, and services. In doing so, they have to accept that the customer suddenly expects what has recently sparked enthusiasm. Customers don't care how and under what circumstance their initial user experience came about. Fact is, this is something they've come to expect as a standard. Even more: They also expect them from all other retailers and manufacturers.

In gastronomy, for example, customers now expect a glass of water with their shot of espresso that they ordered. Even if that has nothing to do with Italian coffee culture, customers expect that detail. It doesn't help to explain that espresso and water are not an inseparable couple. Likewise, it doesn't help to explain to the customer that their payment via PayPal opens an extra window instead of being directly integrated in the check-out. The customer expects their convenient user experience and it is up to retailers and manufacturers to implement these features without a problem.

In restaurants, customers reward excellent service with a generous tip. In digital commerce, they provide loyalty and recurring sales.

## WE WANT WHAT WE SEE

Four out of five people in Germany own a smart phone.<sup>81</sup> This means that 80 percent of the population have a camera with them at all times. As a result, users no longer have to remember what inspires them, but can simply take pictures of what did. This not only applies to fashion and food, but also to interior design. Although Instagram can now boast four times more users than Pinterest<sup>82</sup>, Pinterest offers a larger pool of high quality images. New features and clever algorithms make Pinterest the first choice for visual search. So Pinterest recognises what the camera shows live or the photo taken and proposes corresponding results.<sup>83</sup> This way, styles and recipes can be discovered on an visual basis.

In the fashion industry, liketoknow.it<sup>84</sup> attacks and allows users to directly buy the styles of their favourite influencers. Especially for fashion retailers with a strong community and large influencer budgets, this offers a

direct channel of conversion. For a smaller budget, the app offers similar looks for less. But the competition does not sleep. Google also offers style ideas<sup>85</sup> in its app and doesn't just suggest design ideas for fashion.

However, user don't just provide high-quality product images. The app yeay<sup>86</sup> buries the product photo and replaces it with product and style videos, responding to a preference from Millennials that they'd rather watch a video. Buy button included.

Home & Living retailer Wayfair<sup>87</sup> launched its visual search in 2016, allowing users to purchase similar furniture and fixtures..

**Do you see what your customers see?**







Looking at a screen and typing, seems almost stale. Virtual reality lets us forget about the real world. Augmented reality merges the physical with the digital world. Smartphones and virtual assistants understand what we say. Looking at this development, it was only a matter of time before hearing also receives its own frontend.

Hearables, minicomputers for the ear, do just that and could push screens into the background as a standalone device in combination with voice control. The most recent example is Pixel Buds<sup>88</sup> from Google. Similar to the Pilot Translating Earpiece<sup>89</sup> by Waverly

## DIGITAL BECOMES AUDIBLE

Labs, the headphones, coupled to a smartphone, are capable of translating live conversations in over 40 languages. The language barrier is meeting its technological end.

More promising, however, is the area of augmented hearing. As with augmented reality, additional digital information is provided, which in this case is output not visually but rather acoustically. Doppler Labs offers here for its smart headphones, One, for example, gives you the ability to play scores and comments directly over the Cleveland Cavaliers basketball games.<sup>90</sup>

A different approach from the combination of smartphones and headphones is the wearable »The Dash«<sup>91</sup> by Bragi. This is actually a minicomputer with touch controls and motion sensors. By nodding or shaking your head, you can confirm or reject input via the smart headphones. For example,

whether to remember a calendar entry or not. There are also options for fitness tracking and high-quality features, such as noise cancellation.

For marketers, this creates a new channel to reach customers. For industry and assembly work, digital hearing could be the trigger for additional digital services; Especially in dirt-intensive operations or where tablets fail because users do not have their hands free.

+++ 2:11am

Cavs win the tip off

+++ 02:12am

Amazing dunk after  
4-0 start of the Cavs

+++ 3:43am

Irving takes over

+++ 4:02am

End of third  
Quarter, Warriors  
lead, 76:75

+++ 5:01am

Lebron picks up his  
4 at a reach in Foul





Magnolia is a platform for digital business, with CMS as its core functionality. This allows companies to build outstanding multi-channel customer experience while controlling all content and assets centrally.

## ARTIFICIAL INTELLIGENCE: A CENTRAL PIECE IN THE PIECE IN THE CONTENT COMMERCE PUZZLE

Artificial Intelligence (AI) can provide the central, missing element to complete the entire content commerce experience.

How can companies create their content commerce dreams by using existing video content? In early 2017, Google announced its »Google Cloud Video

Intelligence API«, which uses artificial intelligence to do the tedious plowing through video archives to find specific content. Whether it's cool cats, snowboarders, or skyscrapers. Google isn't alone: IBM Watson launched a similar app last year.

This allows artificial intelligence to perform the following task: Find all storytelling videos or go through an archive of footage to find specific video content that will personalise the customer experiences created in the content management system.

The result: Expressive, automatically produced recommendations, with videos that best fit certain products. The same technology can also be applied to text and images to bring all content together.

That's the point. The interaction of content-oriented commerce and AI seems to be an important step. Technologies such as these enable companies to extract valuable material from their archives that are full of unstructured filtered content, and then connect this with shopping experiences.

What can we learn from the AI example? It's important to lay down the right technical foundations. The drug store chain Rossmann, for example, went on the offensive last year in e-commerce and launched a fully responsive online shop. The new shop provides the basis for linking sales channels online and offline more in the future. Rossmann is actively working on creating new services and added value to meet the increasing needs of customers with corresponding offers.<sup>92</sup>

We are rapidly moving toward a future where content curation to support the buying experience is

no longer carried out only by people who understand the needs, desires, and context of the shoppers. Instead, we can increasingly rely on machines that perform our day-to-day, time-consuming tasks by tagging content resources or combining buyer preferences with the right products.





## AUNT EMMA STRIKES BACK!



Depending on which group you belong to, stationary retail is dying or is long dead. As often as these statements are repeated, they don't become true. Although it's difficult to find even one example of a purely offline player from small boutiques, even purely online players are becoming more rare.

Physical locations, whether a pop-up store, showroom, or full-fledged flagship, is starting to gain importance again. Especially as marketing and service channels. It is noteworthy, however, that these shops hardly remember the miserable retailing industry of the last millennium. It's just the opposite. New stores can merge online and offline experiences and teach tradition chain stores a thing or two about what a successful omnichannel scenario can look like.

For example, Amazon, Shoepassion, mymuesli, Cyberport, and Mister Spex. The latter have now six branches throughout Germany, which are more reminiscent of an Apple store for glasses than an optician. Once again, Mister Spex sets an example and puts a lot of pressure on the competition, whose online experience is often limited to making appointments at a physical location.

Successfully linking offline and online business is a technological feat. From integrating a POS system, to dynamic RFID price tags and smart mirrors, to QR codes, to find product alternatives or to pack the product you want on-site into the digital shopping cart for delivery. The complexity of the customer journey for merchants is increasing and posing major challenges to merchandise management and warehousing.

Modern locations are digital, intelligent, and unique. They offer value to the customer through a skilful combination of staff and technology, that each channel could not reach by itself. For example, Tommy Hilfiger, Zara, and Adidas have understood this as well.

**What do your stores offer their customers?**

A shortage of skilled workers is a phenomenon that companies from all industries are confronted with. No matter if no new drivers are found in logistics<sup>93</sup>, nursing staff are on strike, and digital experts are missing.

Fewer workers are available due to demographic change, and many are looking for a career as a YouTuber or influencer. For the latter, there is good news, because 100 petrol employees can soon be further educated with corporate costs to become successful digital opinion makers<sup>94</sup>.

The remaining companies need to find solutions to recruiting or developing new staff. Both in structurally weak regions with low numbers of applicants and in

## BRANDS AS EMPLOYERS

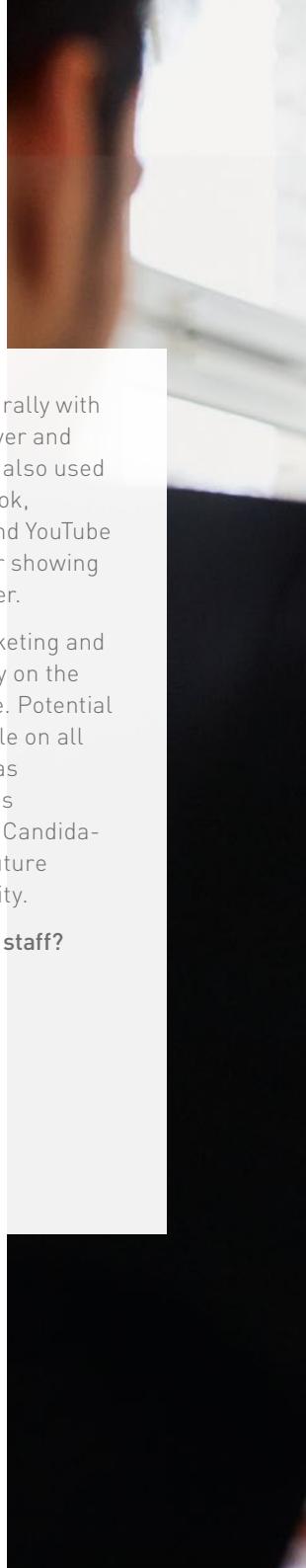
urban centres with strong competition for the best minds. Employees need incentives to promote their company. According to the Global Recruiting Trend Report 2017<sup>95</sup>, employee referrals are the top source of hiring recommendations at 48 percent, followed by online job boards, and social networks.

Relevant, to the point - that's how the applicant should feel during the hiring process. Career and job ads must hold a viewer's attention at first glance. Information and emotion must be transported equally. Here, typical stock photos are an absolute no-go. BMW, Deloitte, and Daimler show real employees and offer additional explanatory content about the position in video form.

Authenticity comes naturally with young applicants. Unilever and Boston Consulting have also used social networks Facebook, Instagram, Snapchat, and YouTube as a point interaction for showing the brand as an employer.

Modern personnel marketing and recruiting no longer rely on the job advertisement alone. Potential applicants are accessible on all channels. Also virtual, as demonstrated by Bayer's #Bayer360<sup>96</sup> campaign. Candidates can discover their future employer in virtual reality.

**How do you find the best staff?**





## DR. DIGITAL

**D**iagnosing diseases via Google has proven to be unreliable. If you look long enough at your own symptoms, you get with almost certainty the same diagnosis: Cancer!

The situation is different with data-driven a health diagnosis. Wearables such as fitness bands, heart rate monitors, and activity trackers can provide data that was otherwise measured only by a long-term ECG. Also, digital blood sugar meters for diabetes patients are normal for many.

This development and the popularity of fitness and nutrition apps are affecting the medical and insurance industries. BARMER<sup>97</sup> offers a variety of apps for its customers under the catchphrase »mobile health«. These include hearing tests, as well as fitness and knee exercises. In addition, doctors nearby can be found and rated, and services can be claimed through your insurance.

In 2016, IBM's Artificial Intelligence Watson diagnosed a rare form of blood cancer in a patient in Tokyo within 10 minutes.<sup>98</sup> The attending physicians said that it would've taken weeks to come to that conclusion, or maybe never would have. The preparation of large amounts of data also affects medicine.

Likewise, extensive CRM systems for institutions of medical care become normal. This ensures that all information about the patient is centrally available to all nursing staff and doctors. Speaking of an individual and as comfortable as possible user experience may seem irreverent, but the goal of high-quality medical care still applies.

**Are you ready for digitalisation?**



DR. WATSON



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In  
Conclusion

## DIGITAL EXCELLENCE DOESN'T EXIST WITH THE TOUCH OF A BUTTON

When is a trend just a hype and when is it a revolutionary idea? Unfortunately, this question can hardly be answered to everyone's satisfaction at the time of the trend. Some trends turn into a revolution within just a few months. Others take years. Still others fall into oblivion over time.

The analyst firm Gartner solves this dilemma with a so-called hype cycle. Thereafter, each trend goes through four stages, which tragically may be different in terms of each type of trend. First, the innovation itself. This is followed by a phase of exaggerated expectations. In this phase, the gap between actual use cases and advertised vision is greatest. Phase three is the so-called valley of disappointed expectations. Here, hypes are exposed as hot air of the advertising industry and it decides which trend will survive and make it into the fourth phase: The phase of productivity.

What initially seems frustrating, is an opportunity for retailers and manufacturers. Those who get involved in trends gain time to experiment and to test and develop new channels, business models, and methods for the suitability for their own company. Change is a process that takes time. Digital entrepreneurship and digital excellence in marketing, sales, and services is not something that can be installed with the touch of a button.

Will wearables, hearables, and voice assistants, in the future, be part of customer's daily lives as a mixed reality and will digital engagement platforms prevail, that offer users personalised omnichannel experiences? We will only know it in the future. Nevertheless, trends are a valuable source of inspiration.

**Only those who know their digital world can adapt to their digital environment.**

# About Us

dotSource, that's more than  
200 digital natives working  
together on one vision:  
Paving the way for  
companies in the digital  
future of marketing, sales,  
and services.

## ABOUT US

We at dotSource have been supporting companies from Germany, Austria, and Switzerland in their digital transformation and the internet presentation of their brands since 2006.

From user-centred e-commerce platforms through sophisticated customer relationship and product data management right up to targeted online marketing measures, we offer our clients a comprehensive range of services and holistic expertise across all aspects of the digitalisation of marketing, sales, and services. With our groundbreaking solutions, we have been able to establish ourselves as one of the leading digital agencies in German-speaking Europe and are now among the top 10 largest companies in the industry.

We see ourselves as a partner of our customers, whose special requirements and needs flow from the first idea. Companies with large, sometimes multinational online projects, such as Swarovski,

Cornelsen, hagebau, Würth, and Music Store, rely on our expertise in terms of strategy consulting, development and implementation of cutting-edge digital concepts.

With numerous publications and events, such as our blog Handelskraft.de, the annual Trend Book, and the Handelskraft Conference, we network industry know-how and provide information about current trends and perspectives in the digital market. In order to comprehensively prepare specialists and executives for the challenges of digital transformation in their company, we launched the Digital Business School together with the Steinbeis Technology Group in 2015.

The now over 200-strong team of our owner-managed company ensures structured success, personal consultation, and high dynamics for sustainable success in the digital business.

# DIGITAL SUCCESS RIGHT FROM THE START

## - KNOW-HOW -

We share inspiring experiences and new insights with you. Not only in our annual Trend Book, but also in our white papers, on Handelskraft.com, on our YouTube channel, and in seminars from the Digital Business School.



### WHITE PAPERS

In numerous publications, we network industry know-how and talk about current trends and perspectives in digital business. Best practices, insights, and lessons about topics such as cross-channel retail, e-commerce software selection, product data management, B2B e-commerce, SEO, conversion optimisation, digital transformation, and mobile commerce.

All white papers and special publications, such as the Trend Book, can be downloaded from our homepage for free.



### HANDELSKRAFT BLOG

Handelskraft has existed since 2007 and is one of the leading German e-commerce and online marketing blogs. We don't go after every trend. We focus on the really important developments in retail. In doing so, we take a well-founded and concise position and give an outlook on the possibilities that digital transformation brings with it. We already share our ideas with over 5,000 readers.

Are you planning an e-commerce or social media event? Contact us for a media partnership at [info@handelskraft.de](mailto:info@handelskraft.de)





### YOUTUBE CHANNEL

On the dotSource YouTube channel, we bring our publications to life.

At »dotSource Research«, our digital experts regularly provide you with first-hand know-how in the digitisation of marketing, sales, and services.

In »Digital Business Talk« Handelskraft author Oliver Kling invites you to a conversation. The focus is always on current developments in online commerce, whether online marketing, online sales, or online services.

For even more commerce know-how subscribe to our channel.



### DIGITAL BUSINESS SCHOOL

Further education and training for executives, IT, sales, and marketing specialists: With a certification as »E-Commerce Manager« or the »Digital Transformation Architect«, you will receive well-founded and practice-oriented knowledge of selected areas of digital transformation from long-standing industry experts. With this knowledge, you're able to expand and even further develop your e-business sector.

The Digital Business School is a further education project of dotSource GmbH and the Steinbeis Technology Group.

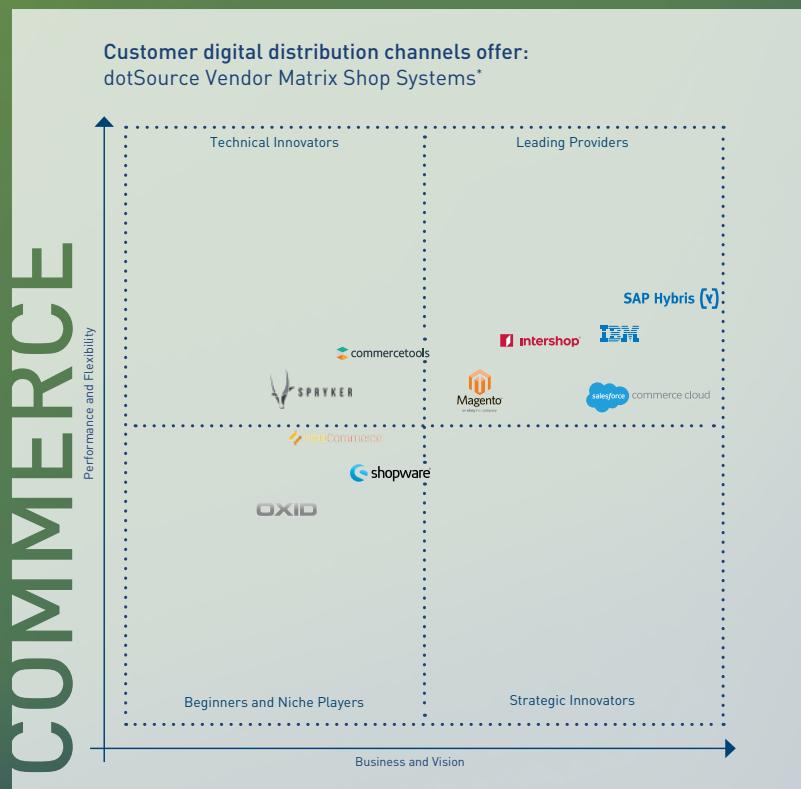
Find out more about our exciting offer for 2018 on our website.



# DOTSOURCE DIGITAL EXPERIENCE UNIVERSE

Modern digital platforms consist of a variety of solutions. Who are the main technology providers? How do they position themselves compared to their competitors? What are the solutions from providers?

The dotSource Vendor Matrix provides an overview of relevant competitors adapted to the German-speaking market and classify them into the categories »Newcomers and Niche Players«, »Strategic Innovators«, »Technical Innovators«, and »Leading Vendors«.



## SUCCESSFULLY DECIDE WITH THE DOTSOURCE VENDOR MATRIX



The dotSource Vendor Matrix is available in the following topics:

- Customer Relationship Management
- Product Data Management
- Shop Systems
- Content Management Systems
- Marketing-Automation

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[www.dotSource.com/vendor-matrix](http://www.dotSource.com/vendor-matrix)

# DIGITAL SUCCESS RIGHT FROM THE START

## - EVENTS -

At the Handelskraft Conference 2018 and the Handelskraft Digital Breakfasts, we want to do more together, determine trends, and make digital business models even more successful.



### HANDELSKRAFT CONFERENCE

The future of business is digital. At Handelskraft 2018, we want to mobilise retail – with trends, best practices, and new impetus for more agility, innovation, and better change management. Retailers and manufacturers learn what levers need to be put in place to challenge new digital pathways.

In exciting sessions, practical lectures, and personal consultations you'll be optimally equipped. Benefit from the experiences of others, find your strategy, and overcome digital challenges.

Secure your ticket for Handelskraft 2018 now!



### DIGITAL BREAKFAST

On your mark – get set – digitise! We start the day together: With lectures on current trends, a revitalising breakfast buffet, and plenty of fresh coffee. Expect exciting lessons and insights from best in class industry experts. This breakfast is the ideal opportunity for lively discussions and a valuable exchange of experience with business contacts from B2C and B2B.

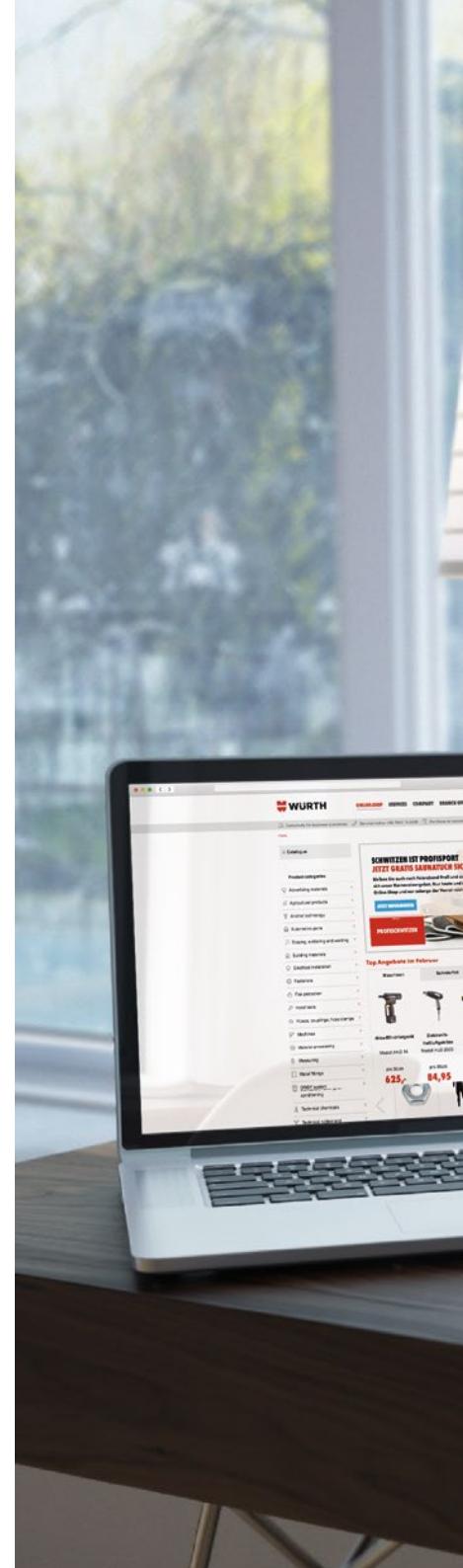
Our event is aimed at retailers and manufacturers in the fields of branded products & industry, retail, fashion, and lifestyle as well as media and publishing.

On our website you will find all the dates for 2018!



| EVENT                               | DATUM          | ORT               |
|-------------------------------------|----------------|-------------------|
| <b>TYPO3camp Mitteldeutschland</b>  | <b>1.25-27</b> | <b>Dresden</b>    |
| Handelskraft 2018                   | 2.20           | Munich            |
| <b>Savant E-Commerce Conference</b> | <b>2.27-28</b> | <b>Berlin</b>     |
| Internet World                      | 3.6-7          | Munich            |
| <b>eCommerce Camp</b>               | <b>3.22-24</b> | <b>Jena</b>       |
| Digital Breakfast                   | 3.23.          | Berlin            |
| <b>ECC-Forum B2C</b>                | <b>4.12</b>    | <b>Cologne</b>    |
| Digital Breakfast                   | 6.22           | Stuttgart         |
| <b>E-Channels Day</b>               | <b>5.3</b>     | <b>Munich</b>     |
| Planet Trade                        | 5.17-18        | Cologne           |
| <b>Shopware Community Day</b>       | <b>5.18</b>    | <b>Duisburg</b>   |
| Digital Breakfast                   | 6.29           | Cologne           |
| <b>Meet Magento</b>                 | <b>6.18-19</b> | <b>Leipzig</b>    |
| K5                                  | 7.3            | Berlin            |
| <b>Digital Breakfast</b>            | <b>9.7</b>     | <b>Dusseldorf</b> |
| Dmexco / BE.INSIDE Premium          | 9.11-13        | Cologne           |
| <b>Digital-Breakfast</b>            | <b>9.28</b>    | <b>Zurich</b>     |
| Digital Breakfast                   | 10.19          | Munich            |

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Handelskraft Conference 2017 was a great event! Top speakers and the impressive location of the Porsche factory Leipzig gave all participants a fantastic day centred around the future of digital business. At the »Handelskraft 2018 - Conference for Digital Success« on the 20th of February in Munich, we will continue this success and join you in finding new ways to successful retail.





## A SELECTION OF OUR PARTNERS





## WE'D LIKE TO SAY THANKS

### CONTENTSERV

A product information management system (PIM) digitises the marketing processes and ensures efficient and emotionally appealing product communication, whose data quality and informative value increase many times over. The innovative contextual MDM specialises in extensive and locally varied product ranges and enables an unparalleled tailor-made product experience in real-time across all channels.

More than 300,000 users in 89 countries use technology-leading Contentserv software solutions, which have received numerous awards from international analysts. It is no coincidence that Contentserv is one of the top 10 innovators and strong performers in the PIM sector.



### EMARSYS

Emarsys is the largest independent marketing platform company in the world. Founded in 2000, the company enables more than 2,000 brands in more than 70 countries to connect with their 2.5 billion customers around the world. Every day, we deliver more than 140 million personalised interactions via e-mail, mobile, social

media, and the internet, allowing us to record 1.5 million purchases of our software. The AI-based Emarsys platform is constantly learning and improving with every interaction. Learn more about Emarsys at [emarsys.com](http://emarsys.com).



## COMMERCETOOLS

commercetools provides retailers with an auto-scaling, cloud-based omnichannel e-commerce platform that empowers customers to deliver immersive shopping experiences across all channels and devices, and to manage their digital transformation in a disruptive market environment.

The foundation for this is an innovative, highly flexible e-commerce API that maps all business processes and makes it easy to integrate

third-party applications. Even for a modern microservice architecture, which can radically reduce development speed and time-to-market, the API-first approach of commercetools offers the ideal basis. More about commercetools & microservices at: [www.commercetools.com](http://www.commercetools.com)



## MAGNOLIA

Magnolia is a digital business platform with content management as its core functionality. Companies such as Airbus, Al Arabiya, Avis, and Virgin America use Magnolia as the heart of their web, mobile, and IoT initiatives.

Magnolia's unique open suite approach helps companies accelerate time to market, adapt flexibly to new business conditions, and easily integrate third-party

systems. This allows them to build outstanding multi-channel customer experience while controlling all content and assets centrally. Magnolia was founded in 1997, is headquartered in Basel, Switzerland and is privately owned. The company has worldwide subsidiaries and customers in more than 100 countries.

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## Contact

### dotSource GmbH

#### Head Office Jena

Goethestraße 1  
07743 Jena

#### Office Leipzig

Hainstr. 1-3  
04109 Leipzig

#### Office Berlin

Pappelallee 78/79  
10437 Berlin

FON +49 (0) 3641 797 9000

FAX +49 (0) 3641 797 9099  
MAIL [info@dotSource.de](mailto:info@dotSource.de)