



LA SFIDA PER I RETAILERS

DA FISICO VS. E-COMMERCE A VERO
OMNI-CHANNEL, I PAGAMENTI COME UN
ALLEATO «INATTESO»

3 novembre, 15.30 – 16.30

BAIN & COMPANY 

**WHO IS GOING
TO TALK TODAY?**



Who is going to talk today?

Moderators



**Mauro
Anastasi**

*Partner
at Bain &
Company*



**Marco
Bertin**

*Associate Partner
at Bain &
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Speakers



**Alessandra
Grendele**

*CIO
at Carrefour
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**Luca
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*CIO
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Feltrinelli*



**Mattia
Giardini**

*Treasury
Manager
at KIKO MILANO*



**Alessandro
Viola**

*Head of
Corporate Sales
at Nexi Payments*



A background of red stage curtains with vertical folds and a slight gradient from top to bottom.

**LET'S SET THE
STAGE**

e-Commerce is increasingly central in our life...

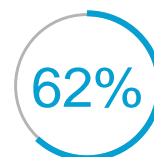


e-Comm saved shopping in pandemics...



of **global shoppers** said **online shopping** came to their rescue in 2020¹

... it is here to stay...

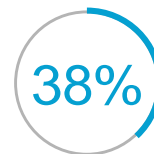


of **global shoppers** will increase their use of **digital shopping channels** in the future¹

... and it will become the (only/) main «shop»



of **Italian shoppers** plan to buy **online** most of the products they need²



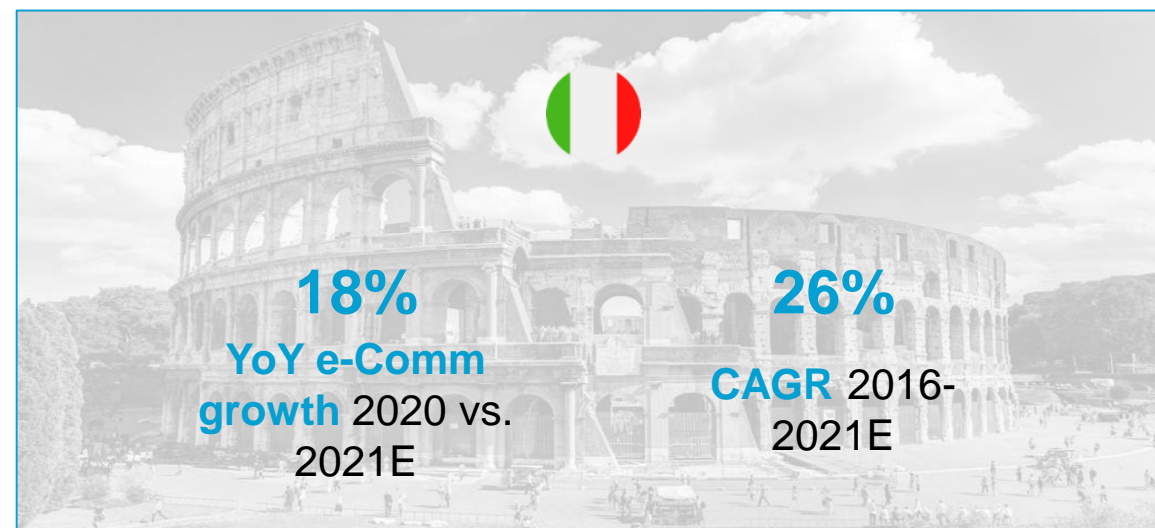
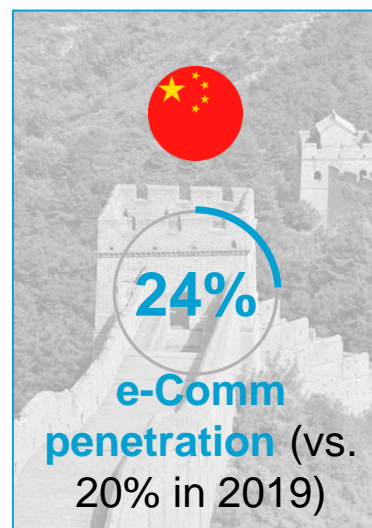
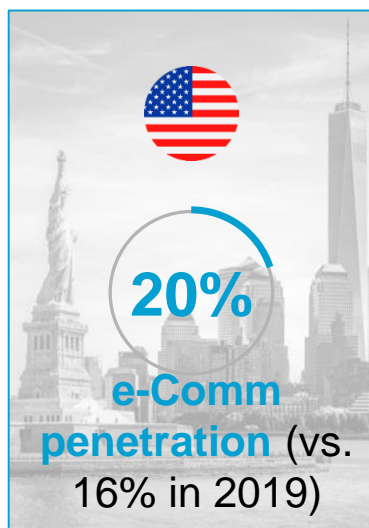
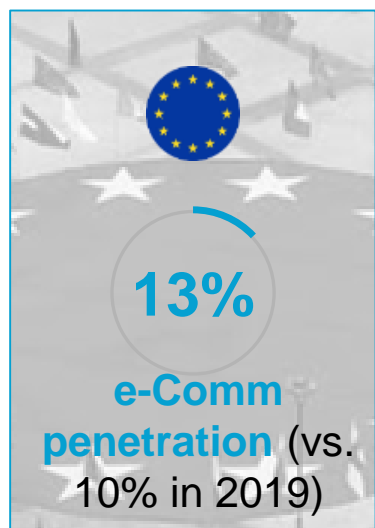
of **global shoppers** **search** for products **on Amazon** (along at least one stage of their customer journey)¹

Note: 1. Results from market interview to 28k+ global consumers (across 17 countries) who shop online at least once a month conducted by W. Thompson; 2. Results from market interview to 10k+ EU consumers (across 8 markets, incl. Italy) conducted by UPS
Source: «The future shopper report 2021» by Wunderman Thompson; «Report UPS smart e-Commerce 2021: cosa cercano gli acquirenti europei in un e-Commerce» by UPS

... it has quickly gained relevance globally and in Italy as well

e-Commerce has quickly moved from niche to widespread global adoption ...

... Italy starting behind but growing fast



Note: Data exclude transactions value for services (e.g. travels, transports,...)
Source: «eCommerce B2C: la chiave per ripartire» from Osservatorio eCommerce B2C of Politecnico di Milano, 2020

Consumers now expect to switch indifferently across channels

59% of global shoppers wish brands would communicate seamlessly across digital & physical channels¹

YESTERDAY

In the past, one single channel along the whole customer journey

TODAY

Now continuous switches across different channels



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 Source: «The future shopper report 2021» by Wunderman Thompson

Italian retailers know that omni-channel is a must for customer experience...



Strategy

54%

CEOs directly involved in Omni-channel Customer Experience (OCX) projects



People & Orga

31%

of companies created a Business Unit or a “working team” to support OCX



Technology / data mgmt.

64%

supported by a unique CRM to manage data



Projects from Offline to Online

24%

of companies running projects to enhance tech solutions to personalize customer experience in store



Projects from Online to Offline

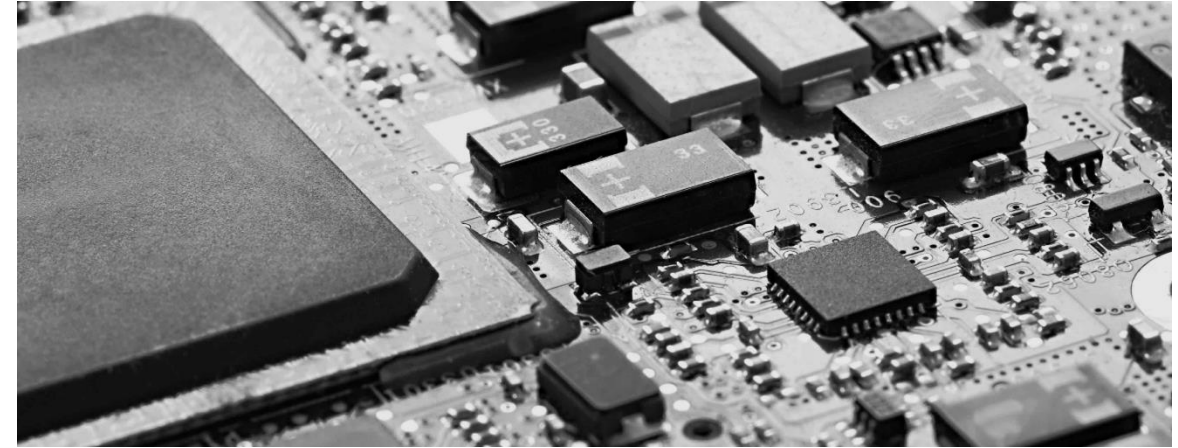
47%

of companies running projects to integrate and support online sales (e.g. click & collect)

...and Payments are increasingly relevant within channel strategy...



Digital Payments a pillar to deliver omni-channel customer experience



Will to integrate Payments with ERP / other systems



of Italian retailers emphasize the **central role of digital payments in omni-channel strategy**



consider **payment integration** with other systems **a key requirement** in POS provider selection and in channel strategy definition

...however most Italian Retailers lack an organic approach to Digital Payments



only



of Italian retailers

is **designing an international Digital Payments strategy** across countries



only



of Italian retailers

has **undertaken actions to develop an international strategy on Digital Payments**



only



of Italian retailers

has **set up *ad-hoc* subsidiary to manage payments** activities for all the Group's network

Source: Results from a Bain's interview to Italian large retailers across industries

**HOW CAN RETAILERS
LEVERAGE ON DIGITAL
PAYMENTS TO FULFILL
OMNI-CHANNEL
EXPECTATIONS?**



TIME FOR PANEL DISCUSSION

The background of the slide features a blurred, grayscale image of several people in business attire standing in a modern office or conference room. A large, blue question mark is superimposed over the center of the image, partially overlapping the silhouettes of the people.

- ① What does it mean “**Omni-Channel**” for **Retail customers** and what are the **main challenges** to deliver it?
- ② What do **Retailers** expect from **Digital Payments**?
- ③ What can **Payments player** offer to help **Retailers**?
- ④ What is the **future for Italian Retailers in e-Commerce / Omni-channel**?

1

What does it mean “**Omni-Channel**” for **Retail customers** and what are the **main challenges** to deliver it?



2

What do Retailers expect from Digital Payments?



3

What can **Payments player**
offer to help **Retailers**?



4

What is the **future for Italian Retailers in e-Commerce / Omni-channel?**



Thank you! And feel free to reach us @ ...

Moderators



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