

# Shopping Tomorrow Kickoff 2020

## (E)commerce in de nieuwe tijd

Kitty Koelemeijer

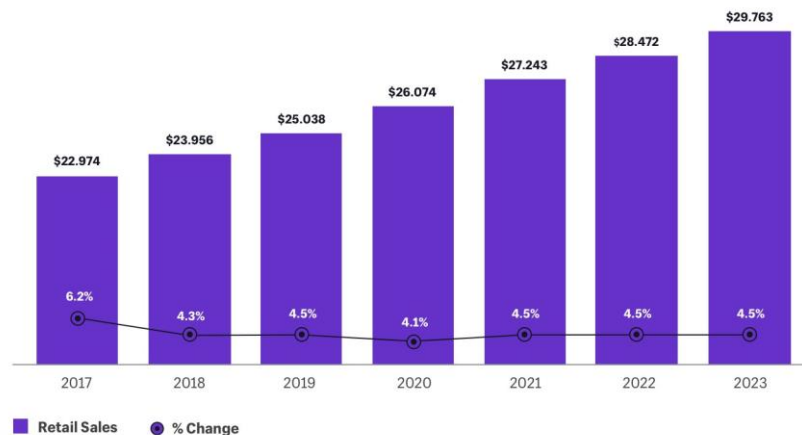


The Cloud, 15 april 2020



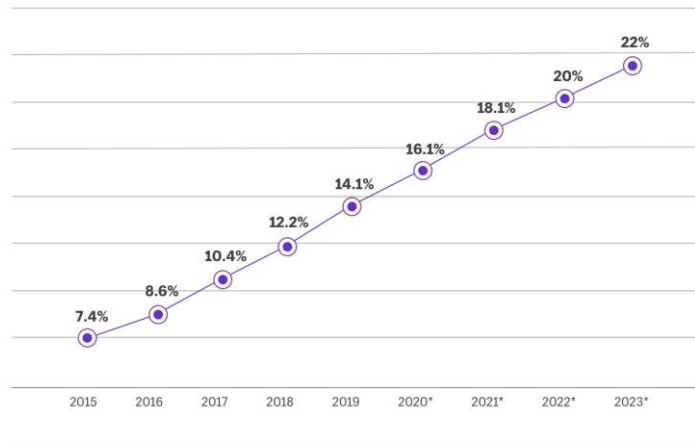
## Total retail sales worldwide, 2017-2023

Trillions and % change



Source: eMarketer

## Ecommerce share of total global retail sales from 2015 to 2023



Worldwide; eMarketer; 2015 to 2019  
Source: eMarketer © Statista 2019

Marktaandeel  
Amazon 37,7% in  
ecommerce VS 2019

NOS

Nieuws

Sport

Uitzendingen

TELEBIJST

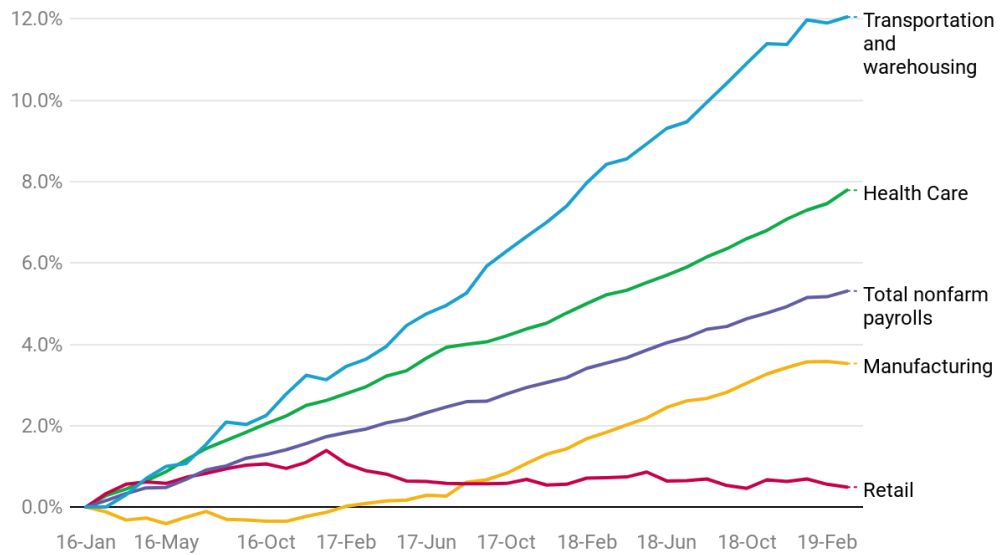
AEX

## Consument laat ook de winkelstraat in de grootste steden vaker links liggen



ANP

## US nonfarm job growth since 2016



Source: Bureau of Labor Statistics • [Get the data](#) • Created with [Datawrapper](#)

## Four famous stores that may not survive because of coronavirus

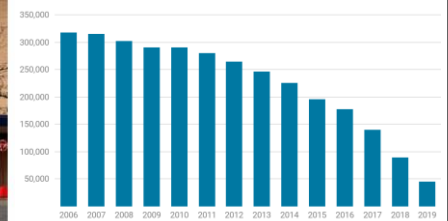


By Nathaniel Meyersohn and Chris Isidore, CNN Business  
Updated 1650 GMT (0050 HKT) April 7, 2020



A Sears store that is going out of business in Livonia, Michigan on March 26, 2020. (Photo by Jeff Kowalsky/AFP/Getty Images)

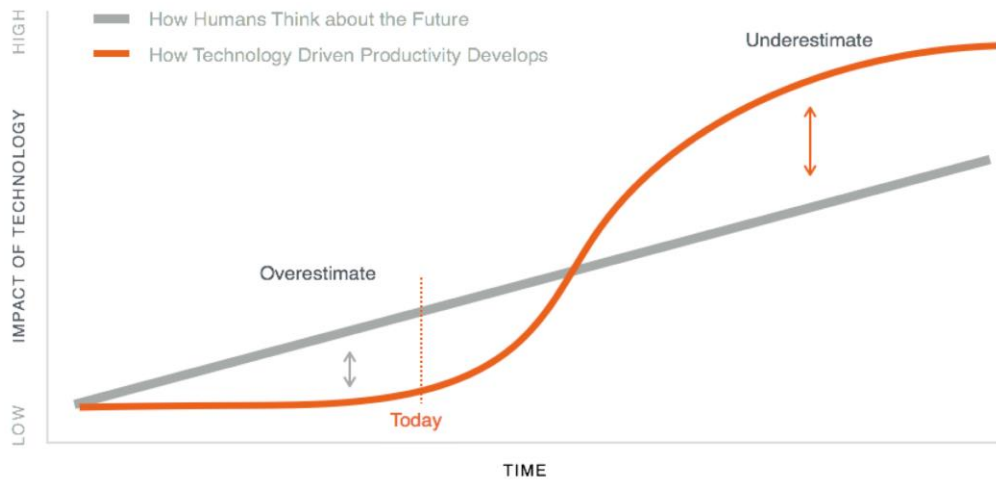
Sears employees



Dates are fiscal years ended January or February of year displayed.

[Get the data](#) • Created with [Datawrapper](#)

## Wet van Amara



Source: Roy Charles Amara, Wikipedia

FYRFLY Venture Partners

De anderhalvemeter economie

## Hoe retailers zich voorbereiden op de anderhalvemeter economie



Omzet =

Traffic  
Conversie  
Bonbedrag

Vastgoedmarkt



HOME CORONA FINANCIEEL BELEGGINGEN TRANSACTIES ONTWIKKELING

markt pand (single asset) portefeuille

Nieuws

27 mrt

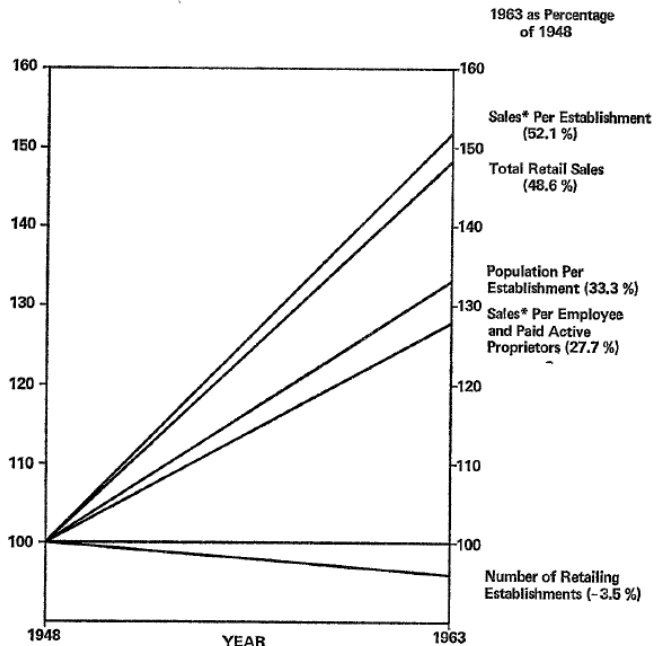
'8 procent omzetverlies retail in 2020'

Beleggingen



De Nederlandse detailhandel gaat dit jaar 8 procent minder omzet halen door de uitbraak van het coronavirus.

# Retail productiviteit 1948-1963



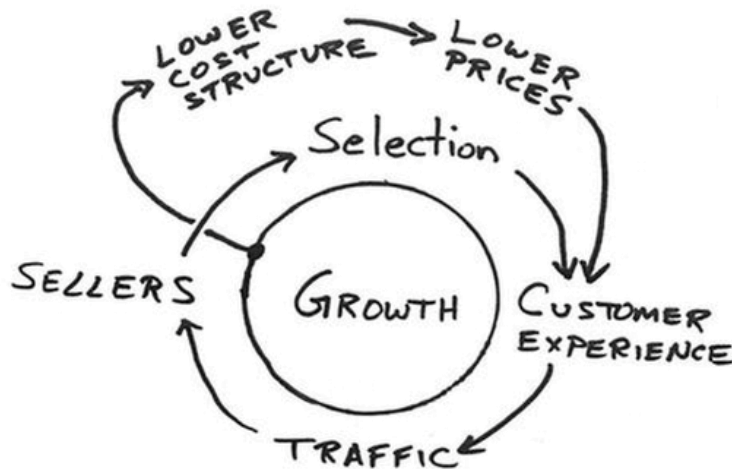
(Konopa 1968)

Sterk dalende vloerproductiviteit in anderhalve meter economie

Aanpassingen zijn kostenverhogend

|  | Netto omzet per m2 wvo |          |          |          |          |                    | Winkel omzet per m2 wvo |          |          |          |          |                    |
|--|------------------------|----------|----------|----------|----------|--------------------|-------------------------|----------|----------|----------|----------|--------------------|
|  | 2014                   | 2015     | 2016     | 2017     | 2018     | 5 j gem (14 - '18) | 2014                    | 2015     | 2016     | 2017     | 2018     | 5 j gem (14 - '18) |
| Totaal excl. web/postorderbedrijven                | € 3.218                | € 3.220  | € 3.285  | € 3.401  | € 3.373  | € 3.299            | € 2.924                 | € 2.928  | € 2.985  | € 3.072  | € 3.024  | € 2.987            |
| <b>DAGELIJKS</b>                                   | € 8.077                | € 7.905  | € 7.926  | € 7.978  | € 7.987  | € 7.975            | € 7.657                 | € 7.571  | € 7.493  | € 7.607  | € 7.604  | € 7.586            |
| <b>Levensmiddelen</b>                              | € 8.358                | € 8.125  | € 8.132  | € 8.204  | € 8.222  | € 8.208            | € 7.962                 | € 7.837  | € 7.756  | € 7.935  | € 7.948  | € 7.888            |
| Supermarkten                                       | € 8.579                | € 8.250  | € 8.227  | € 8.262  | € 8.321  | € 8.328            | € 8.289                 | € 8.069  | € 7.960  | € 8.125  | € 8.176  | € 8.124            |
| Overige levensmiddelen                             | € 7.144                | € 7.416  | € 7.587  | € 7.858  | € 7.635  | € 7.528            | € 6.170                 | € 6.522  | € 6.582  | € 6.802  | € 6.593  | € 6.534            |
| Buitenlandse levensmiddelenzaken                   | € 3.616                | € 3.611  | € 4.110  | € 4.627  | € 4.690  | € 4.131            | € 3.184                 | € 3.205  | € 3.552  | € 3.991  | € 4.041  | € 3.595            |
| Biologische winkels                                | € 5.205                | € 6.124  | € 6.509  | € 6.069  | € 9.280  | € 7.037            | € 4.299                 | € 4.699  | € 4.694  | € 6.693  | € 6.530  | € 5.183            |
| Afg. specialzaken                                  | € 6.299                | € 6.584  | € 6.707  | € 6.715  | € 6.660  | € 6.593            | € 5.418                 | € 5.527  | € 5.442  | € 5.380  | € 5.327  | € 5.419            |
| Brood- en banketzaken                              | € 4.627                | € 4.393  | € 4.521  | € 4.343  | € 3.772  | € 4.331            | € 4.237                 | € 3.823  | € 4.105  | € 4.050  | € 3.513  | € 3.946            |
| Kaas- en delicatessenwinkels                       | € 6.444                | € 6.877  | € 6.874  | € 6.989  | € 6.837  | € 6.804            | € 5.824                 | € 5.574  | € 6.384  | € 6.509  | € 6.361  | € 6.130            |
| Slagerijen   | € 10.841               | € 11.310 | € 11.522 | € 11.821 | € 11.297 | € 11.358           | € 9.497                 | € 10.939 | € 10.596 | € 10.794 | € 10.307 | € 10.427           |
| Poeliers   | € 9.990                | € 10.715 | € 11.675 | € 10.779 | € 9.721  | € 10.576           | € 9.195                 | € 9.147  | € 10.687 | € 10.005 | € 9.015  | € 9.610            |
| Viswinkels   | € 9.341                | € 9.198  | € 9.350  | € 9.137  | € 8.528  | € 9.111            | € 8.180                 | € 8.442  | € 8.424  | € 7.832  | € 7.301  | € 8.036            |
| Snoep en chocolaterieën                            | € 3.756                | € 3.819  | € 4.244  | € 3.811  | € 3.816  | € 3.889            | € 3.327                 | € 3.611  | € 3.759  | € 3.453  | € 3.455  | € 3.521            |
| Sluiterijen  | € 8.150                | € 8.748  | € 8.959  | € 9.255  | € 9.017  | € 8.826            | € 6.457                 | € 6.725  | € 7.275  | € 7.364  | € 7.169  | € 6.998            |
| Specialzaken in overige voedings- en genotmiddelen | € 5.266                | € 5.661  | € 5.916  | € 7.055  | € 6.568  | € 6.093            | € 4.569                 | € 4.787  | € 5.039  | € 6.459  | € 6.009  | € 5.373            |
| Tabak- en gemakzaken                               | € 8.782                | € 8.620  | € 8.363  | € 7.777  | € 7.458  | € 8.200            | € 7.972                 | € 8.478  | € 7.772  | € 7.228  | € 6.909  | € 7.672            |
| <b>Persoonlijke verzorging</b>                     | € 6.077                | € 6.316  | € 6.408  | € 6.373  | € 6.324  | € 6.300            | € 5.482                 | € 5.639  | € 5.560  | € 5.276  | € 5.178  | € 5.427            |
| Drogisterijen                                      | € 5.638                | € 5.809  | € 5.740  | € 5.522  | € 5.427  | € 5.627            | € 5.211                 | € 5.371  | € 5.219  | € 4.954  | € 4.840  | € 5.119            |
| Parfumerieën                                       | € 8.762                | € 9.255  | € 10.454 | € 11.530 | € 11.764 | € 10.353           | € 7.140                 | € 7.193  | € 7.626  | € 7.231  | € 7.232  | € 7.284            |
| <b>NIET-DAGELIJKS</b>                              | € 1.974                | € 1.997  | € 2.027  | € 2.125  | € 2.083  | € 2.041            | € 1.712                 | € 1.717  | € 1.762  | € 1.807  | € 1.742  | € 1.748            |
| <b>Mode en luxe</b>                                | € 2.570                | € 2.831  | € 2.977  | € 3.027  | € 2.890  | € 2.907            | € 2.246                 | € 2.448  | € 2.588  | € 2.581  | € 2.427  | € 2.500            |
| Warenhuizen  | € 1.801                | € 1.725  | € 2.167  | € 2.079  | € 1.714  | € 1.501            | € 1.387                 | € 1.347  | € 1.701  | € 1.582  | € 1.267  | € 1.457            |
| Mode   | € 2.801                | € 2.829  | € 2.870  | € 2.981  | € 2.918  | € 2.880            | € 2.498                 | € 2.468  | € 2.528  | € 2.575  | € 2.480  | € 2.510            |
| Algemene textielzaken                              | € 1.163                | € 1.131  | € 1.199  | € 1.176  | € 1.263  | € 1.186            | € 1.133                 | € 956    | € 1.016  | € 980    | € 1.042  | € 1.025            |
| Baby- en kindermode                                | € 3.996                | € 4.048  | € 4.228  | € 4.210  | € 3.800  | € 4.056            | € 3.646                 | € 3.222  | € 3.781  | € 3.721  | € 3.262  | € 3.526            |
| Bodyfashion  | € 4.235                | € 4.699  | € 5.276  | € 5.211  | € 5.340  | € 4.952            | € 3.100                 | € 3.495  | € 3.592  | € 3.398  | € 3.434  | € 3.404            |
| Dames- en herenmode                                | € 2.663                | € 2.735  | € 2.703  | € 2.735  | € 2.748  | € 2.717            | € 2.430                 | € 2.427  | € 2.444  | € 2.434  | € 2.409  | € 2.429            |
| Damesmode  | € 3.037                | € 2.846  | € 3.006  | € 3.335  | € 3.078  | € 3.060            | € 2.817                 | € 2.653  | € 2.791  | € 2.951  | € 2.675  | € 2.777            |
| Herenmode  | € 2.913                | € 3.462  | € 3.396  | € 3.816  | € 3.969  | € 3.511            | € 2.773                 | € 3.232  | € 3.182  | € 3.518  | € 3.621  | € 3.265            |
| Modetartikelen en bijouterieën                     | € 3.850                | € 3.904  | € 4.179  | € 4.178  | € 4.540  | € 4.130            | € 3.729                 | € 3.458  | € 4.029  | € 3.996  | € 4.332  | € 3.909            |
| Textielsupermarkten                                | € 2.388                | € 2.304  | € 2.362  | € 2.618  | € 2.355  | € 2.405            | € 1.561                 | € 1.491  | € 1.870  | € 1.713  | € 1.539  | € 1.578            |
| Ledenrenzaken                                      | € 4.238                | € 4.424  | € 4.645  | € 5.251  | € 5.093  | € 4.730            | € 3.340                 | € 2.807  | € 3.584  | € 4.145  | € 3.962  | € 3.568            |
| Schoenenzaken                                      | € 2.741                | € 2.685  | € 2.767  | € 2.833  | € 2.705  | € 2.746            | € 2.461                 | € 2.428  | € 2.425  | € 2.457  | € 2.279  | € 2.410            |
| <b>Huishoudelijke artikelenzaken</b>               | € 2.749                | € 2.712  | € 2.443  | € 2.367  | € 2.036  | € 2.261            | € 2.290                 | € 2.235  | € 1.988  | € 1.903  | € 1.585  | € 2.000            |
| Optiekzaken en juweliers                           | € 7188                 | € 7776   | € 7813   | € 7714   | € 7923   | € 7683             | € 6569                  | € 7233   | € 7144   | € 6874   | € 7022   | € 6968             |
| Optiekzaken  | € 7310                 | € 7841   | € 7899   | € 7359   | € 7698   | € 7621             | € 6507                  | € 7360   | € 7183   | € 6894   | € 6960   | € 6963             |
| Juweliers  | € 7026                 | € 7883   | € 7685   | € 8269   | € 8283   | € 7789             | € 6505                  | € 7050   | € 7087   | € 7157   | € 7122   | € 6984             |
| <b>Vrije tijd</b>                                  | € 2.398                | € 2.300  | € 2.324  | € 2.372  | € 2.303  | € 2.339            | € 2.057                 | € 1.919  | € 1.949  | € 1.998  | € 1.902  | € 1.965            |
| Sport- en kampeerszaken                            | € 1.727                | € 1.723  | € 1.751  | € 1.906  | € 1.977  | € 1.817            | € 1.529                 | € 1.477  | € 1.507  | € 1.628  | € 1.661  | € 1.560            |
| Hobby, spel en media                               | € 2.836                | € 2.702  | € 2.730  | € 2.700  | € 2.527  | € 2.699            | € 2.401                 | € 2.226  | € 2.263  | € 2.258  | € 2.067  | € 2.243            |
| Boekhandels  | € 3.571                | € 3.398  | € 3.044  | € 3.341  | € 3.164  | € 3.304            | € 3.202                 | € 3.053  | € 2.814  | € 2.909  | € 2.705  | € 2.937            |
| CD-winkels   | € 1.830                | € 1.478  | € 1.457  | € 1.560  | € 626    | € 1.390            | € 1.759                 | € 1.242  | € 1.206  | € 1.289  | € 442    | € 1.188            |
| Kantoorboek- en vakhandel                          | € 3.013                | € 3.034  | € 3.251  | € 3.155  | € 3.146  | € 3.120            | € 2.833                 | € 2.824  | € 2.940  | € 2.833  | € 2.785  | € 2.803            |
| Muziekhandel                                       | € 1.542                | € 1.680  | € 1.467  | € 1.466  | € 1.462  | € 1.523            | € 1.211                 | € 1.380  | € 960    | € 1.241  | € 1.218  | € 1.202            |

## Het volume-efficiency model faalt



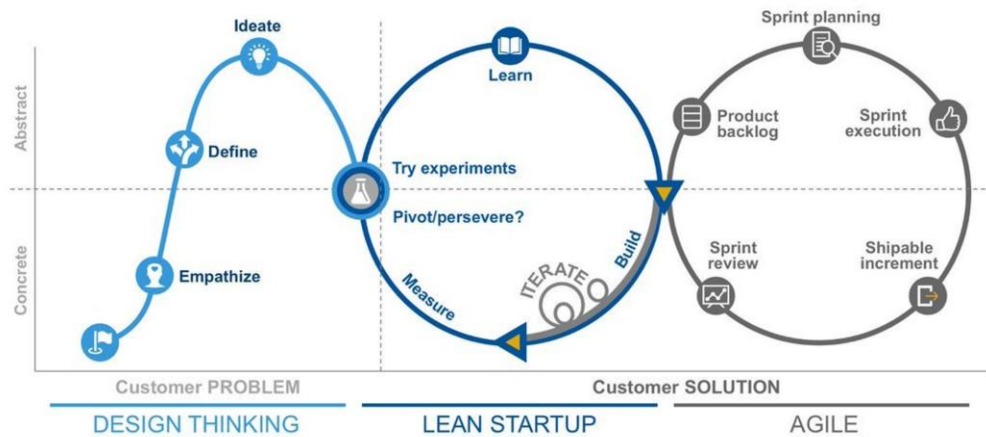
## Bronnen van innovatie

Ondernemers/ondernemende organisaties zoeken altijd naar verandering en benutten de kansen die zich voordoen

(Peter Drucker)

# Procesbehoeften

## Combine Design Thinking, Lean Startup and Agile



#GartnerSYM

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Bedrijven

## Nederland doet massaal online boodschappen: 700 man erbij voor Picnic

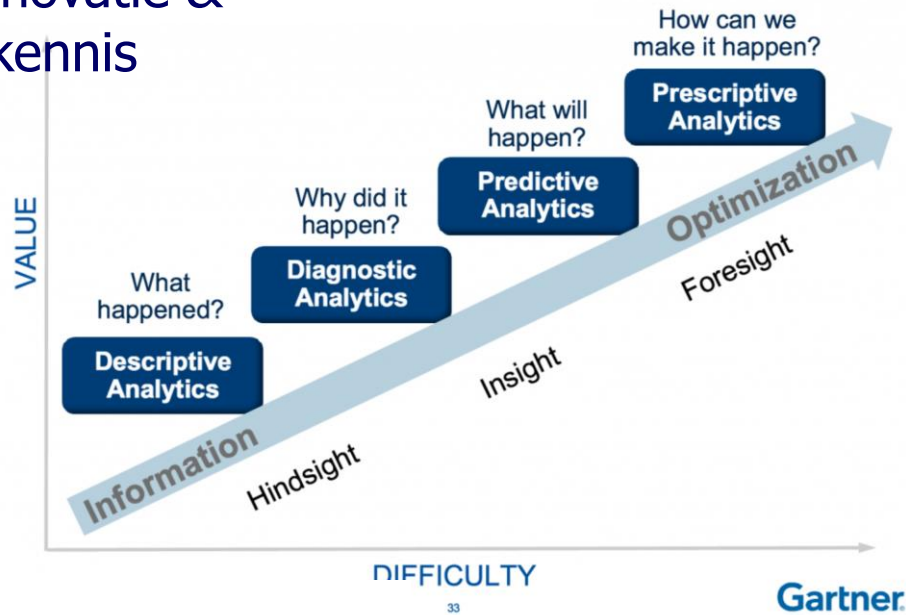
03 april 2020 17:02



De digitale winkel van Albert Heijn op Schiphol. Beeld © Albert Heijn



# Procesinnovatie & nieuwe kennis



3,183 views | Jan 10, 2020, 10:49am EST

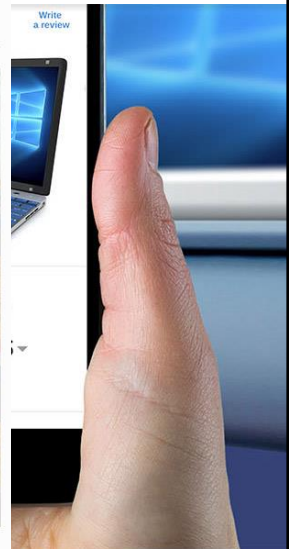
## Robots Take Retail



Greg Petro Contributor @ Investing



smart retail concept, robot service use for check the data of or Stores that stock goods on shelves ... [+]

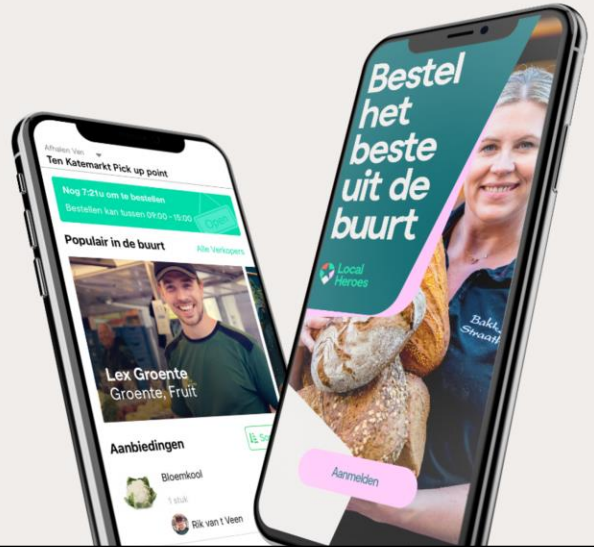


## Korte ketens en meer lokaal?



Bestel het **beste** uit de buurt

Local Heroes is het e-commerce platform waarmee je eenvoudig en altijd via de app het aanbod van **lokale** ondernemers kan bestellen



## Incongruities (absurditeiten):

De realiteit wijkt af van onderliggende aannames



(Peter Drucker)

QUARTZ

ALIBABA'S BIG BREAK

## China's internet got a strange and lasting boost from the SARS epidemic

April 14, 2016

By Bobby Ghosh



make it

SUCCESS MONEY WORK LIFE VIDEO

## The SARS epidemic threatened Alibaba's survival in 2003—here's how it made it through to become a \$470 billion company

Published Thu, Mar 26 2020 • 2:56 PM EDT



Tom Huddleston Jr.

Share

## Amid Coronavirus, JD.com Has an Advantage Over Rivals

CONTRIBUTOR

Billy Duberstein — [The Motley Fool](#)

PUBLISHED

MAR 23, 2020 8:45AM EDT

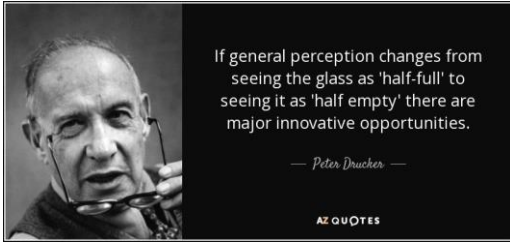


### Asset-light may not be the right move

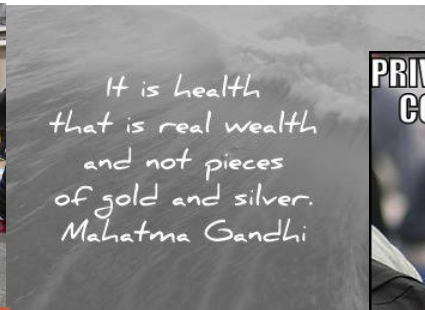
Investors should understand how JD.com differs from larger rival **Alibaba** (NYSE: BABA) and upstart challenger **Pinduoduo** (NASDAQ: PDD). First, Alibaba is the oldest and largest of the Chinese e-commerce platforms and has traditionally employed an "asset-light" strategy, by which it collects commissions on items sold through its platforms as well as advertising revenue. Pinduoduo has a similar business model, though with a unique twist that allows buyers to "team" up for bulk buying, with items often shipping directly from the manufacturer. Both elements further lower costs to the end consumer. In addition to not taking control of inventory, both Alibaba and Pinduoduo outsource their delivery to third parties.

### JD owns it all

This is in contrast to JD, which decided early on to build out its own logistics network across the country and also employ all of its own delivery personnel in-house. Last quarter, JD's owned warehouse space expanded to 16.9 million square meters. JD also initially focused on high-quality merchandise from large and medium-sized businesses, and has pushed into more general merchandise in recent years, including fresh groceries.



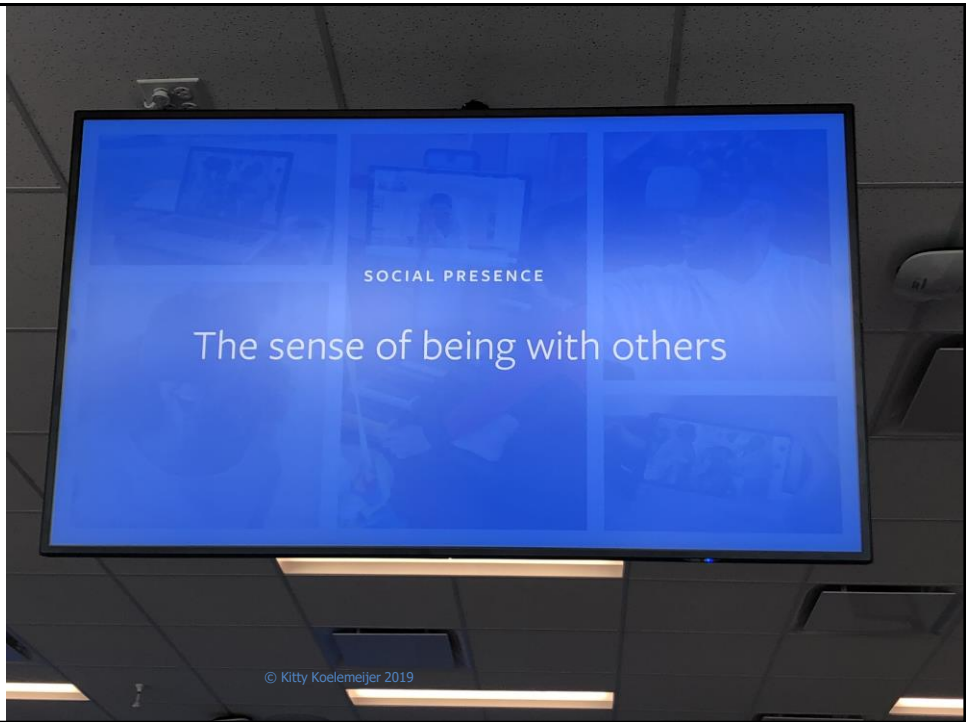
## Consumentengedrag verandert door crisis



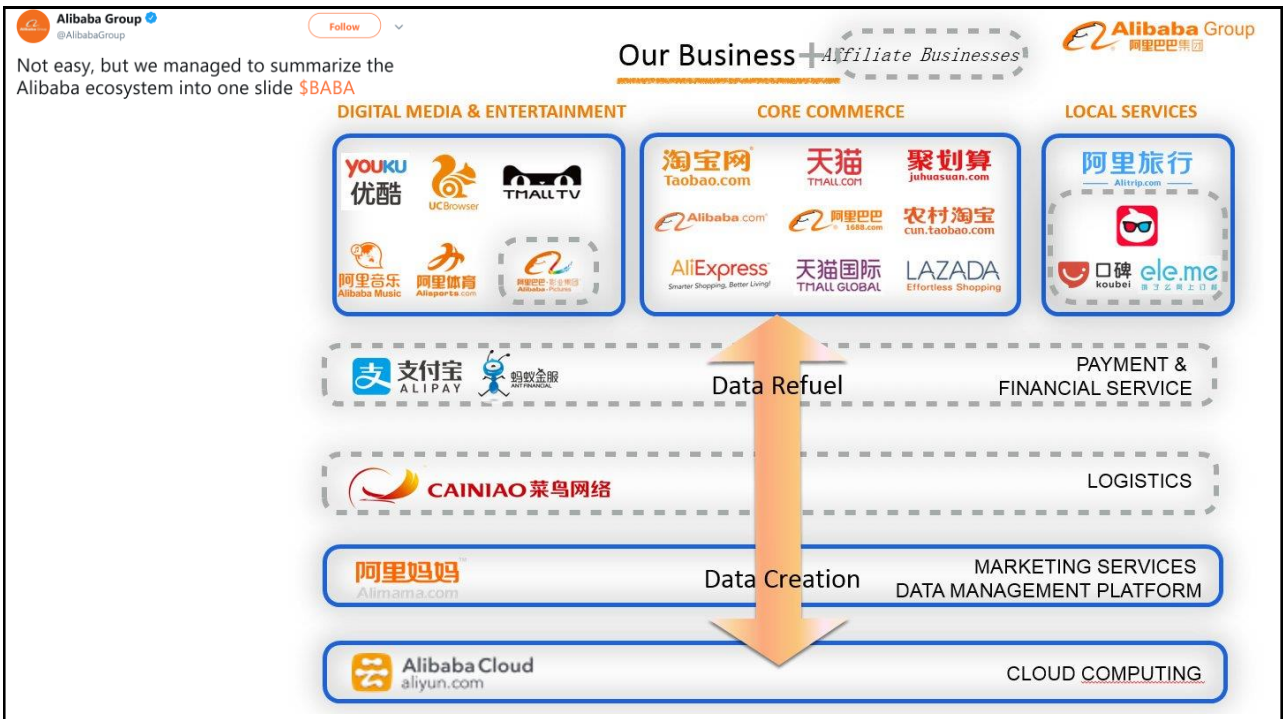
**PRIVILEGED FIRST WORLD CONSUMER ACTIVIST**



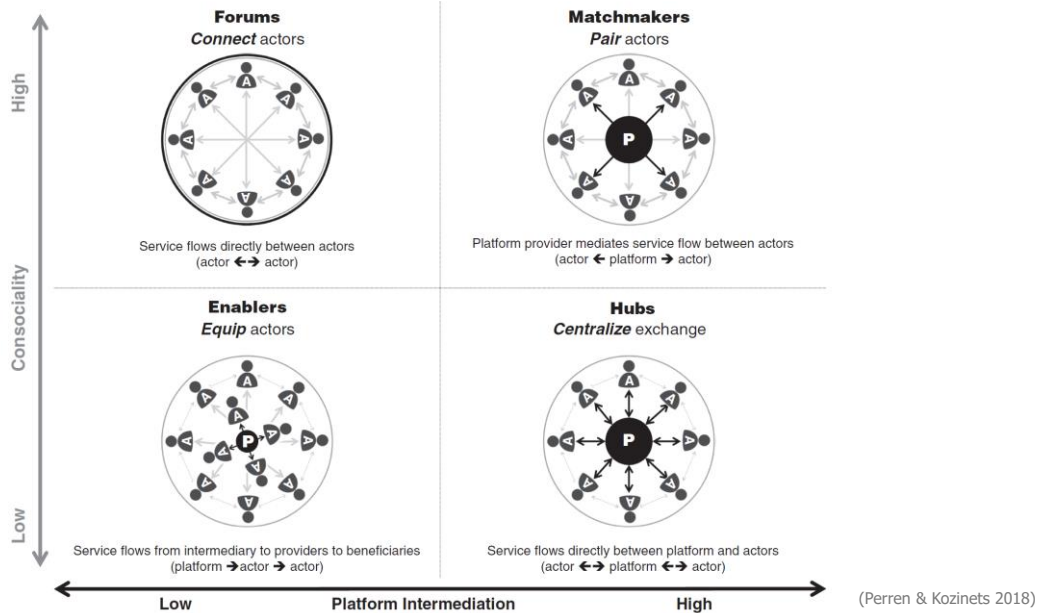
Sociale nabijheid wordt schaars?!



© Kitty Koelemeijer 2019



## Platformen en ecosystemen zetten door

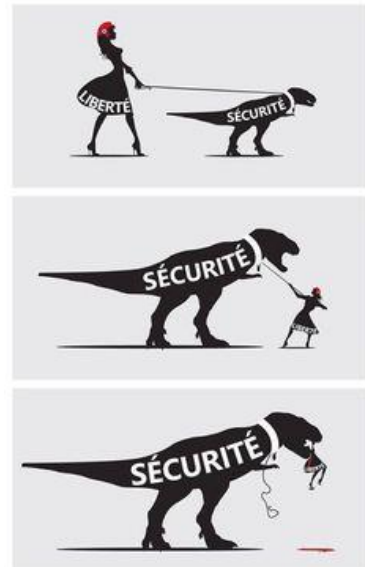


Het Parool 17-4-2020

## Meer dan zestig wetenschappers sturen samen brandbrief aan kabinet over corona-app

Zestig gerenommeerde wetenschappers hebben maandag een brief gestuurd aan het kabinet met daarin de waarschuwing om kritisch te kijken naar het nut en de noodzaak van de corona-apps. Vooral de sociaal-maatschappelijke en juridische impact ervan weegt bij de wetenschappers zwaar.

**Bonne Kerstens** 13 april 2020, 21:56



## Privacy: grote mogelijkheden voor IoT



## Trending topics in retail & technology

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Director Center for Marketing & Supply Chain Management  
Nyenrode Business Universiteit  
Supervisory Board Member



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