

CCEC | RESEARCH

LOCAL SHOPPING PLATFORMS 2016



INTRODUCTION

Dear Reader,

While digitalization offers considerable opportunities, it also implies a major challenge for trade overall and retail in particular. Due to its specific characteristics, this challenge is particularly difficult for local owner operated retail outlets. Analyzing the potential of new business models that might get realized successfully is of great importance and priority for this dealer group, which is why local shopping platforms are considered a potentially successful business model for cooperative digitalization.

The present study will introduce the topic of “Local Shopping Platforms“, provide an overview of contemporary platforms with their scope of services, will present the (potential) customer’s view and will try to represent results from a neutral point of view. We would like to point out that all representations, results and evaluations should not be seen as recommendations for individual platforms and/or services. Furthermore, we would like to point out that this study will not help to draw any conclusions regarding the prospects of success of the platforms analyzed.

Since local shopping platforms will also be relevant in the future, we would be interested to receive any information on other platforms, their services and functionalities, applications and hear about any new possible solutions. Do not hesitate to contact us if you are interested in our work or if you would like to cooperate with us.

Best regards,

Prof. Dr. Peter Weber
Lars M. Bollweg, M. A.

EU SUPPORTED PROJECT



EUROPÄISCHE UNION
Investition in unsere Zukunft
Europäischer Fonds
für regionale Entwicklung



EFRE.NRW

Investitionen in Wachstum
und Beschäftigung

CCEC | IN WORDS

The Competence Center E-Commerce (CCEC) was founded in the year 2000 as a research field of the “Institut für Unternehmensführung” (IFU), or Institute for Corporate Management, at the Ruhr-University of Bochum. The CCEC is dedicated to the scientific analysis of technology-driven change processes along with the development of innovative approaches and solutions to related challenges. Since its foundation a wide range of both theory and practice-oriented projects have been completed successfully. Our current project partners and sponsors include other universities and research institutions in the EU: the Federal Ministry for Education and Research (Bundesministerium für Bildung und Forschung, BMBF), the German Research Foundation (Deutsche Forschungsgemeinschaft, DFG), the German Association for the Promotion of Humanities and Sciences (“der deutsche Stiftverband”) and dedicated companies as well as consortia of businesses in various industries. The academic findings of the CCEC’s analyses is published, presented and discussed within an international context at regular intervals. In the course of its continuous growth, the CCEC has expanded to its second location at the Free University of Berlin in 2007, followed by its third location at the South Westphalia University of Applied Sciences Soest campus in 2012.



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GLOSSARY

Affiliate Marketing

A sales distribution method where each recommendation earns a commission reward.

Click & Return

A delivery service where products are ordered online and unwanted items can be returned in store.

Click & Collect

A delivery service where products are ordered online and picked up in store.

In-Store Navigation

An in-store navigation system which guides customers to the products they are looking for.

Reserve & Collect

A delivery service where products are reserved online and picked up and paid for in store.

Responsive Design

Responsive design web pages adapt their content display to the device used for viewing it (desktop computer, tablet oder smartphone). Responsive design pages can be viewed well on mobile devices.

Same Day Delivery

A delivery service where products are delivered on the day they were ordered.

Same Hour Delivery

A delivery service where products are delivered one hour after they were ordered.

Location-enabled Services

Service category based on the proximity of retailers to the homes of customers.

Location-based Services

Service category based on customer's current location close to the stores of retailers.

LOCAL SHOPPING PLATFORMS 2016

1. SUMMARY

What this study provides:

- An overview of existing local shopping platforms in German- and English-speaking regions
- An overview of local shopping platforms' characteristics and of the services offered
- An in-depth look at the usage of location-based services by local shopping platforms
- Results of a consumer survey regarding local shopping platforms with a focus on location-based services
- An evaluation of the current level of development and of potential optimization- and synergy potentials

This study does not include:

- Any statements on the quality of the analyzed platforms and their services offered
- Any recommendations for the usage of local shopping platforms in general nor for individual services in detail

Overall Findings of the Platform-Analysis

- The analyzed platforms feature a modern platform architecture (responsive, distinctive design, contemporary product presentation)
- The analyzed platforms only very rarely take into account the location-based advantages provided by dealers and stores connected
- Location-based services are virtually ignored
- Location-enabled services are implemented on a small scale
- Recommendation systems and digital payment options are only very rarely offered
- The use of social-media platforms and of other digital communication tools is popular. Facebook is the established standard here

Overall Findings of the Consumer Survey

- The majority of respondents consider local shopping platforms to be helpful and have a positive attitude towards them
- The majority of respondents would consider buying from a local shopping platform
- The results show that local shopping platforms should make more use of the dealers location advantages for their own services
 - Location-based services are considered helpful
 - Location-enabled services are considered helpful
 - Respondents underlined an additional willingness to pay for location-enabled services which provide time advantages (e.g. same day delivery)

Evaluation of Results

It is uncertain whether customers will accept offers by local dealers on local shopping platforms or whether they will continue to opt for the big electronic market places like Amazon or Ebay. Furthermore, it remains a tough challenge to turn the generally positive attitude of online shoppers and potential customers into actual sales on the local shopping platforms and also in the stores connected. For this purpose, the collaboration between local dealers and local shopping platforms should not only include typical online distribution. In order to preserve and expand the existing business model, an enhanced channel integration (combining online & offline) in overcoming and mastering the digitalization challenge. The local presence of the dealers connected can be used e.g. as a showroom, as a decentralized warehouse system for short delivery distances but also as a platform for personalized shopping support which is a unique selling point of local platforms compared to the huge electronic market places and which might provide added value to the customer in terms of the fast delivery times and the personal shopping experience. In return, local shopping platforms can act as support structure for local dealers faced with the need for digital transformation, they can contribute know-how and support local retailers in developing lacking competences. Local shopping platforms and local dealers therefore must view their business models in general and their local and online points of sale in terms of a network. In addition to that, it is crucial for local retailers and online platforms to set up an extended service structure they both benefit from.

PLATFORM ANALYSIS 2016

2. INTRODUCTION

2.1 Status of local owner operated trading

Their low growth rate environment puts LOOROs under immense pressure (see HDE 2015, p. 7). The market share of LOOROs has fallen from 30% in 1995 to only 14% in 2014 (see Collier International 2015). In 2014 LOOROs suffered the sharpest decline in turnover of all retail outlets in Germany, and the future outlook for LOOROs is also bleak, a further turnover decline by between 30% by 2020 or 2023 has been forecast. Despite the huge growth rates in online retail (17.8% in 2014) (see HDE 2015) the German retail landscape is still dominated by stationary and locally rooted businesses, and LOOROs constitute an important income source for many communities (HDE 2015, p. 9). Although online retail only had a market share of 11.1% in 2014 (see Statista 2015), it has significantly influenced the whole sector with regard to shopping-convenience and service quality (see Heinemann & Schwarzl 2010). The growing influence of E-commerce, which manifests itself not just in the online presence of „pure players“ but also in an increased digitalization of traditionally stationary retail outlets as well as the changing shopping habits of their customers (see IFH 2014; ECC 2011) put enormous pressure on LOOROs and have brought retailers with traditional business models to their knees. On the other hand, an individual and target-oriented digitalization strategy also offers potential advantages for LOOROs with regard to market development, customer satisfaction and competitiveness (see Navickas et al. 2015). However, currently the diffusion of digital retail services seems to hit a barrier for most LOOROs, as only very minor steps towards digitalization can currently be observed. One interesting and much discussed solution to overcoming this digitalization barrier for LOOROs is the increased presence of local shopping platforms for small towns and regions. But as this development is still very recent, it is not yet possible to provide a reliable analysis of the profitability prospects of these platforms or give a long-term prognosis of customer adoption. For this reasons, the current study focuses primarily on local shopping platforms on the market in summer 2016 in a German or English-speaking environment and on the services they offer.

2.2 What is a local shopping platform?

Local shopping platforms mediate between LOOROs and their customers. They function in a similar way to other established electronic market places like Ebay or Amazon.

What is very different is their business model:

While big electronic market continually try to increase their range of products, offering international business-to-customer (B2C) as well as business-to-business (B2B) sales activities, local shopping platforms have the opposite strategy. They position themselves as representing a clearly defined specific local group of dealers and concentrate on transactions between dealers and customers. The local shopping platforms tend to restrict themselves to offering products and services of local dealers, some even restrict themselves to only serving local customers. The platforms use these limits they have set themselves as their unique selling proposition and very deliberately target LOOROs as their clients and target customers who themselves want to focus on local providers.

2.3 Location-based Services

The following analysis strongly suggests that any analysis for local shopping platforms must include the dimension “location advantage”. The fact that local shopping platforms limit their range to locally available products and services begs the question if they also point out and market the location advantages of their LOORO partners. In this context, two aspects are relevant:

1. Location-Enabled Services
2. Location-Based Services

Location-Enabled Services

While pure online players achieve cost advantages through their streamlined logistics processes, LOOROs can counter this advantage through their close proximity to their customers, e.g., short delivery distances and can use this as their USP (e.g., same hour delivery). Such services are called Location-Enabled Services.

Location-Based Services

The combination of online and offline, i.e., of local stores and electronic market places opens many service options which might also reinforce stores as point of sale (POS) positively. Location-based services address customers close to the stores and make them aware of special offers and discounts.

Table 1: Examples of location-dependent services

Location-enabled services	Location-based services
Maps with dealers' locations	Location-based product consultation
Information on local news	Location-based barcode-scanner
Information on local events	Location-based map with nearest dealers
Product availability in the store	Location-based map with nearest products
Information on opening hours	Location-based consultation
Information on dealers' contact details	Location-based advertisement
Home consultation	Location-based loyalty schemes
Personal consultation	Location-based prize-draws
Local loyalty cards	Location-based discounts
Local online customer-communities	Navigation to the store
Same Day Delivery	Location-based shopping tours
Same Hour Delivery	Location-based self-checkout
Click & Return	
Click & Collect	
Reserve & Collect	

3. PLATFORM ANALYSIS

The platform analysis published in this study includes a detailed analysis of 27 local shopping platforms (21 from Germany, four from the US, two from Switzerland). All 27 platforms were independently accessed (via their URLs) and analyzed by three different researchers based on set criteria given in the section Facts & Figures. The results were then pooled and used as the basis of the analysis given in the following section. All data was entered manually and represents the state of June and July 2016. As development in this sector is very dynamic, it is important to view this analysis as a freeze-frame of that time. We are planning to repeat the analysis for 2017, which is why we are particularly interested to get feedback, positive or negative, on our current project, before we embark on the second analysis. Furthermore, we would be glad for any information on other local shopping platforms and online projects.

3.1 Typological classification of local shopping platforms

In our analysis, we looked at shopping platforms with very different functional setups, which alerted us to the fact that a typological classification of shopping platform would be a useful tool. Our classification summarizes the different types of shopping platforms and lists their service functionality. The classification types do not correspond to their maturity level. Thus it is not possible to directly correlate functions and types. Platforms may contain functions of other types in addition to their main type.



Figure 1 - Classification

In the classification provided above, the functionalities and the possible transactions increase with the higher number, including payment and delivery. While platforms of level 1 can mainly be used to advertise to new clients, platforms of level 5 can complete all types of transactions. If we add the functional scope of each platform to this classification, it can be used to analyze the maturity level of a platform.

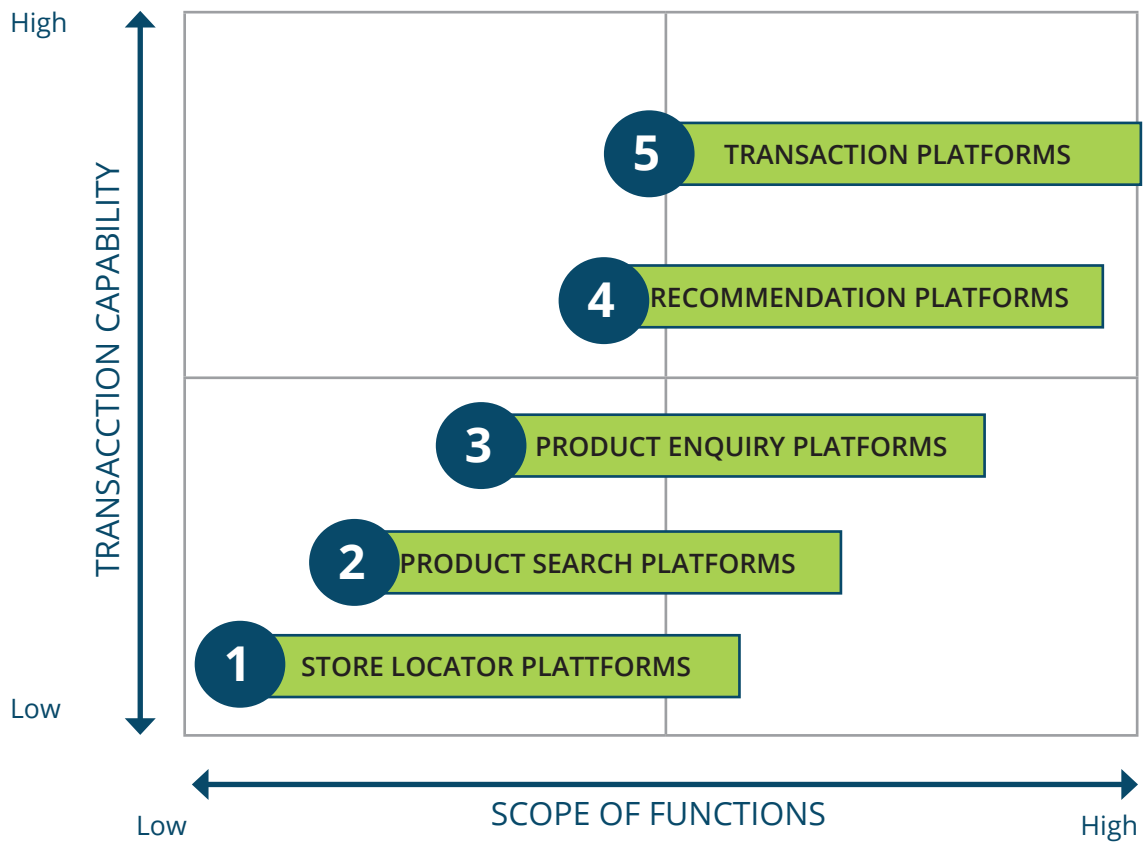


Figure 2 - Types / Maturity level

3.2 Analysis criteria

In the context of our study, the 27 platforms were analyzed according to 27 factors (possible services offered) from the eight categories below (see section Facts & Figures for the factor categories):

1. Platform architecture (max. 12 available)
2. Product presentation (max. 6 available)
3. Location-based services (max. 13 available)
4. Location-enabled services (max. 16 available)
5. Recommendation systems (max. 12 available)
6. Various services (max. 10 available)
7. Payment transaction services (max. 8 available)
8. Social network services (max. 10 available)

3.4 Scoring of Platforms

In order to compare the different platforms, a scoring model was created for the data collected. The scoring model includes all services offered by the platform and the highest platform type it provides, thus the score consists of a type level and a functionality score. The scoring model is to be seen as a quantitative analysis, statements on the service quality are not made. The results should not be viewed as a ranking or as quality evaluation of the platforms or of service implementation.

Scoring example: Platform X includes all functions of type 1 (Store locator platform), type 2 (Product search platform), type 3 (Product enquiry platform) and type 4 (Recommendation platform) and has implemented 45 of 87 services analyzed. The scoring would be as follows:

4.45 (Platform type: 4 / Functionality score: 45)

3.5 Explanation of Platform Characteristics

In the following short descriptions of the 27 platforms, in addition to the web addresses (URLs) and the towns or cities where the platforms are active, information is given on the target group and the range of services and products offered. In this study, target group and range of products are defined in the following way:

Target group

The survey distinguishes between local and supra-regional customers as target groups. A platform described as “local” addresses its services primarily to local customers of a city or region. In contrast, a platform described as “supra-regional” addresses its services also to out-of-town customers.

Range of Products

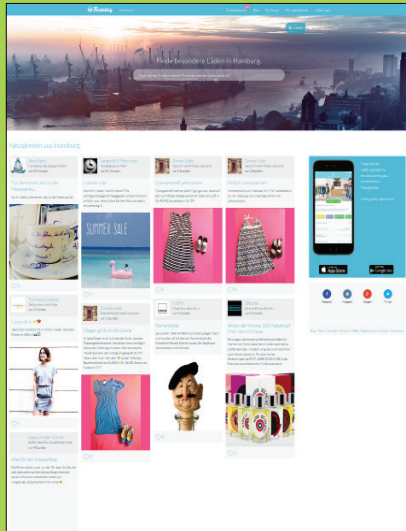
The survey differentiates between the two categories *generalists*, who do not restrict themselves to a particular sector, but offer all types of products and *specialists*, who limit themselves to a particular type of product. *Generalists* offer products from the categories books, media, household goods, gardening, presents, regional products, art, entertainment, toys, games, health articles, stationery, handmade products, electronics, food, drinks, software, sports, smartphones, audi & hifi, kitchen goods, TVs, automotive, decor, pet supplies, glasses, shoes, accessories, fashion, bags, jewelry and services. *Specialists* tended to focus on food, fashion or books.

OVERVIEW OF LOCAL SHOPPING PLATFORMS

TYPE 1 **DEALER LOCATOR PLATFORMS**

(A-Z)

FINDELING



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
9/12	3/6	4/16	4/13	0/12	3/10	0/8	6/10	29/87

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

SCORE

1.29

URL

www.findeling.de

Country
Germany

City / Region
Hamburg, Cologne

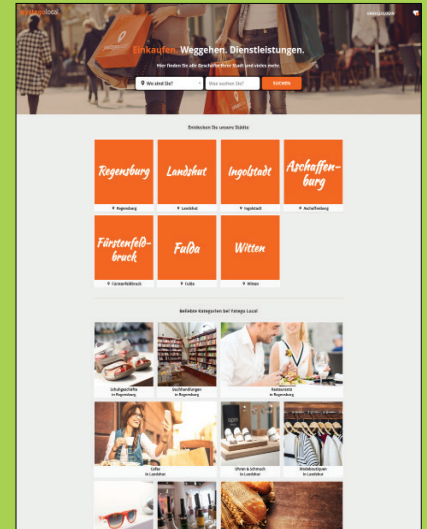
Target group
Local

Range of products
Specialist (Fashion)

YATEGOLOCAL

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation services	Miscellaneous Web Services	Payment Services	Social Engagement Services	Total
8/12	0/6	3/16	0/13	2/12	0/10	0/8	2/10	15/87



SCORE
1.15

URL
www.yategolocal.de

Country
Germany

City / Region
Ratisbon, Witten et al.

Target group
Local

Range of products
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

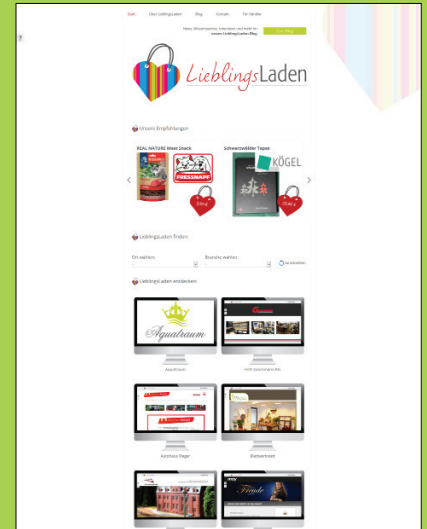
TYPE 2 **PRODUCT SEARCH PLATFORMS**

(A-Z)

LIEBLINGSLADEN

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
7/12	3/6	4/16	0/13	3/12	2/10	0/8	3/10	22/87



SCORE
2.22

URL

www.lieblingsladen.de

Country

Deutschland

City / Region

Constance, Furtwangen et al.

Target group

Local

Range of products

Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

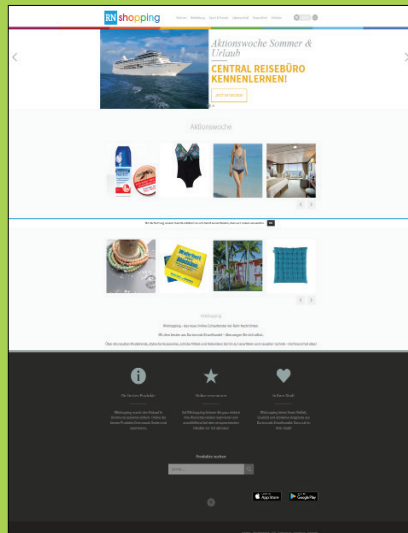
PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

RN-SHOPPING



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
9/12	4/6	5/16	2/13	3/12	2/10	0/8	1/10	26/87

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

SCORE

2.26

URL

www.rn-shopping.de

Country
Germany

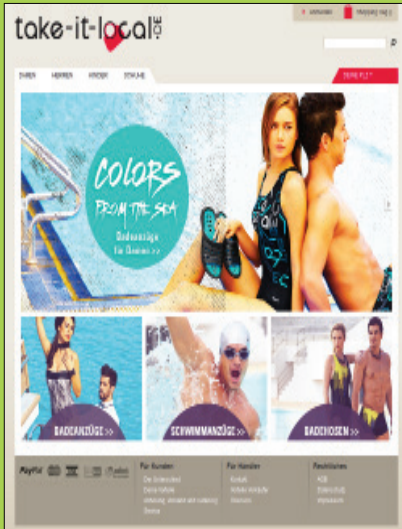
City / Region
Dortmund

Target group
Local

Range of products
Generalist

TYPE 3 PRODUCT ENQUIRY PLATFORMS (A-Z)

ARRANJA



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
3/12	0/6	2/16	0/13	1/12	5/10	1/8	5/10	17/87

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
3.17

URL
www.arranja.de

Country
Germany

City / Region
Starnberg

Target group
Local

Range of products
Specialist
(Food)

DIGITALE CITY

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
2/12	1/6	4/16	0/13	0/12	6/10	1/8	4/10	18/87



SCORE
3.18

URL
www.digitalecity.de

Country
Germany

City / Region
Nürnberg, Erlangen

Target group
Local

Range of products
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

KAUFNAH BETA



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
3/12	0/6	0/16	0/13	0/12	0/10	0/8	3/10	6/87

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
3.06

URL
www.kaufnah.de

Country
Deutschland

City / Region
Bad Orb und weitere

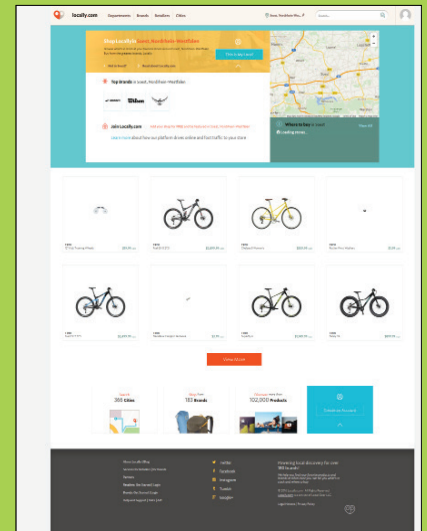
Target group
Local

Range of products
Generalist

LOCALLY

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
9/12	3/6	4/16	0/13	5/12	1/10	0/8	5/10	27/87



SCORE
3.27

URL
www.locally.com

Country
USA

City / Region
New York, Miami und weitere

Target group
Local

Range of products
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

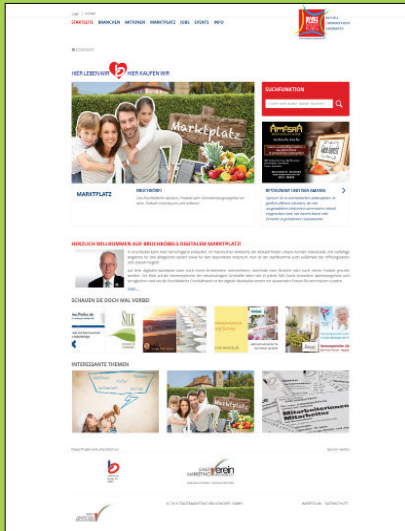
PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

MARKTPLATZ BRUCHKÖBEL



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
7/12	4/6	7/16	0/13	2/12	1/10	0/8	1/10	22/87

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
3.22

URL
marktplatz.bruchkoebel.de

Country
Deutschland

City / Region
Bruchköbel

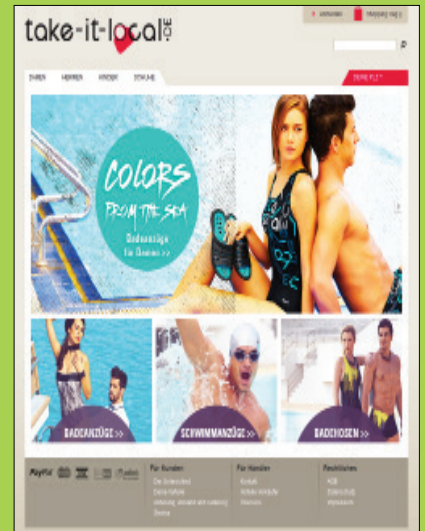
Target group
Lokal

Angebotsumfang
Generalist

TAKE-IT-LOCAL

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
5/12	4/6	3/16	0/13	1/12	1/10	4/8	0/10	18/87



SCORE
3.18

URL
www.take-it-local.de

Country
Deutschland

City / Region
Bad Lipspringe, Osnabrück et al.

Target group
Local / Supra-regional

Angebotsumfang
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.



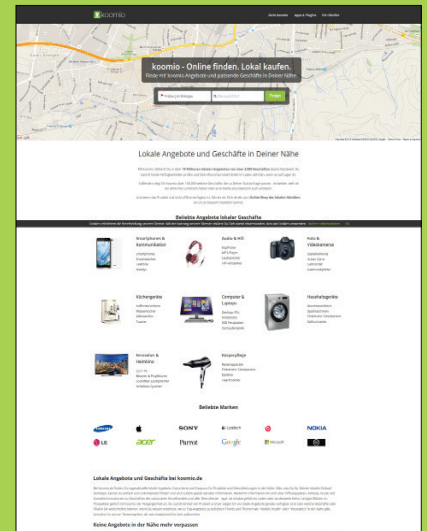
TYPE 4 **RECOMMENDATION PLATFORMS**

(A-Z)

KOOMIO

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
6/12	5/6	7/16	2/13	3/12	1/10	0/8	8/10	32/87



SCORE
4.32

URL
www.koomio.de

Country
Germany

City / Region
Speyer et al.

Target group
Local

Range of products
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

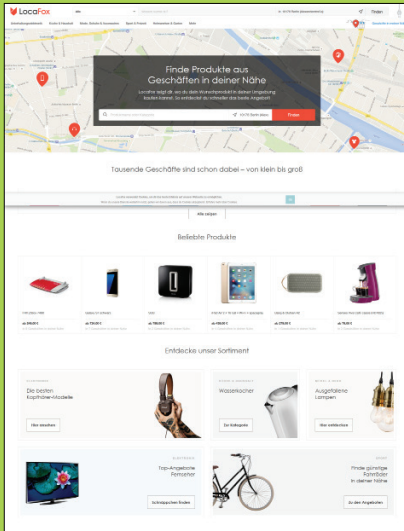
PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

LOCA FOX



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
9/12	4/6	6/16	3/13	6/12	3/10	0/8	6/10	37/87

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.

RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.

PRODUCT ENQUIRY PLATFORM

Enquiring about products.

PRODUCT SEARCH PLATFORM

Checking products and prices.

STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
4.37

URL
www.locafx.de

Country
Deutschland

City / Region
Berlin et al.

Target group
Local

Range of products
Generalist

MEIN JÜLICH

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
6/12	4/6	4/16	0/13	2/12	2/10	0/8	6/10	24/87



SCORE
4.24

URL
www.meinjulich.de

Country
Deutschland

City / Region
Jülich

Target group
Local

Range of products
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.



SNIPDA



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
8/12	4/6	5/16	1/13	2/12	1/10	0/8	3/10	24/87



TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



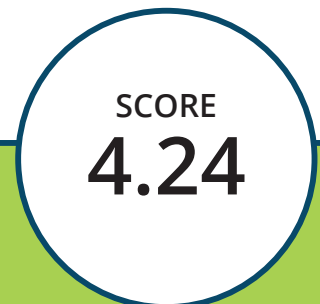
PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.



SCORE
4.24

URL
www.snipda.de

Country
Germany

City / Region
Neumarkt

Target group
Local

Range of products
Generalist

TYPE 5 TRANSACTION PLATFORMS

(A-Z)

ATALANDA



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
9/12	4/6	6/16	0/13	3/12	4/10	3/8	6/10	35/87



TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
5.35

URL
www.atalanda.de

Country
Germany

City / Region
Wuppertal, Attendorn
et al.

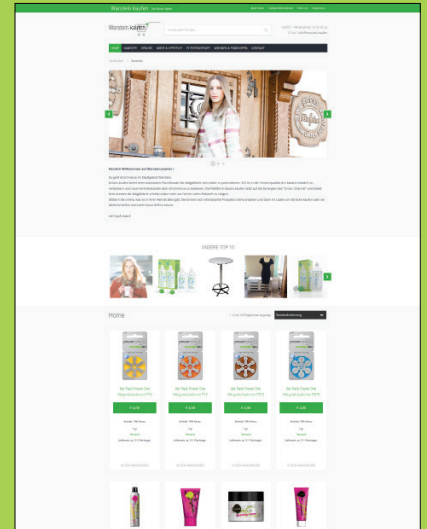
Target group
Local

Range of products
Generalist

BEIUNS.KAUFEN

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
11/12	4/6	3/16	0/13	3/12	2/10	3/8	3/10	29/87



SCORE
5.29

URL
beiuns.kaufen

Country
Germany

City / Region
Warstein

Target group
Local / Supra-regional

Range of products
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.

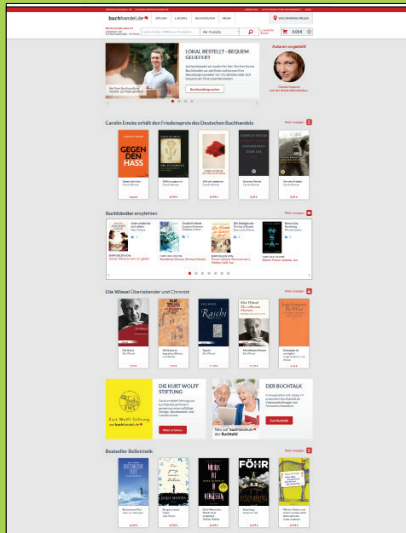


STORE LOCATOR PLATFORM

Overview of dealers.



BUCHHANDEL



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
10/12	4/6	6/16	3/13	2/12	1/10	5/8	4/10	35/87



TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
5.35

URL
www.buchhandel.de

Country
Germany

Stadt / Region
Berlin, Hamburg et al.

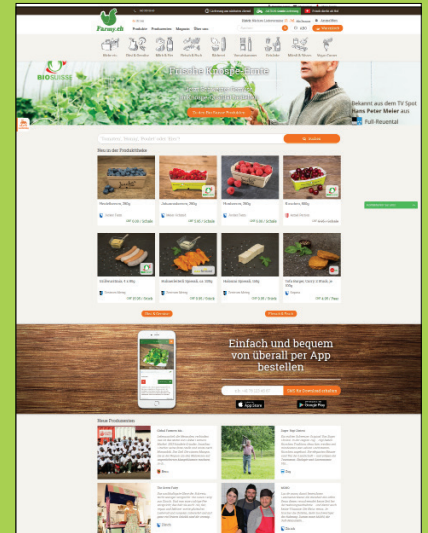
Target group
Local / Supra-regional

Range of products
Specialist (Books)

FARMY.CH

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
10/12	6/6	5/16	0/13	3/12	4/10	4/8	6/10	38/87



SCORE
5.38

URL
www.farmy.ch

Country
Switzerland

Stadt / Region
Zurich

Target group
Local / Supra-regional

Range of products
Specialist
(Food)

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.

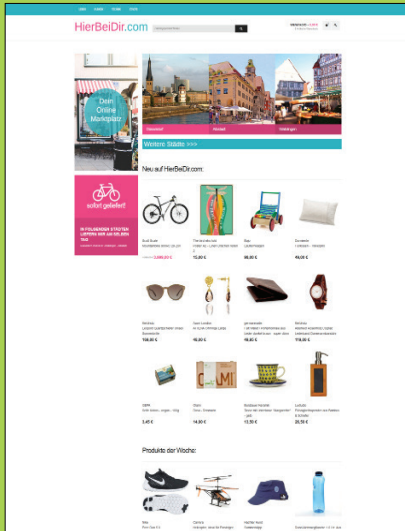


STORE LOCATOR PLATFORM

Overview of dealers.



HIERBEIDIR



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
8/12	4/6	6/16	0/13	2/12	4/10	6/8	6/10	36/87



TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
5.36

URL
www.hierbeidir.de

Country
Germany

City / Region
Düsseldorf, Albstadt et al.

Target group
Local

Range of products
Generalist

KALOKA.CH

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
9/12	4/6	6/16	0/13	3/12	5/10	3/8	5/10	35/87



SCORE
5.35

URL
www.kaloka.ch

Country
Switzerland

City / Region
Bern

Target group
Local

Range of products
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.



KIEZKAUFHAUS



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
6/12	4/6	2/16	0/13	2/12	5/10	2/8	3/10	24/87



TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
5.24

URL
www.kiezkaufhaus.de

Country
Germany

City / Region
Wiesbaden

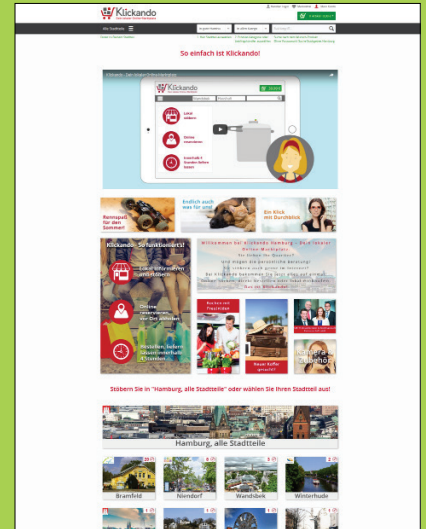
Target group
Local

Range of products
Generalist

KLICKANDO

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
8/12	5/6	8/16	0/13	3/12	5/10	5/8	7/10	41/87



SCORE
5.41

URL
www.klickando.de

Country
Germany

City / Region
Hamburg

Target group
Local

Range of products
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.

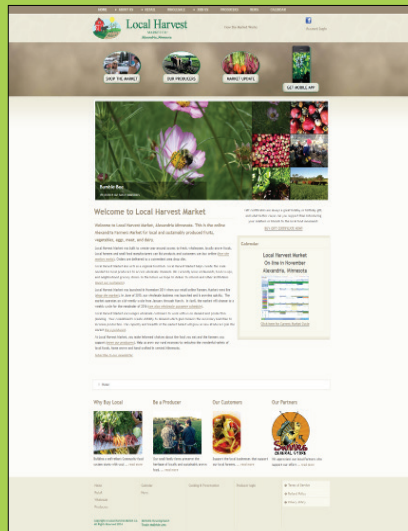


STORE LOCATOR PLATFORM

Overview of dealers.



LOCAL HARVEST MARKET



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
8/12	3/6	3/16	0/13	5/12	4/10	1/8	1/10	25/87



TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
5.25

URL
localharvestmarket.com

Country
USA

City / Region
Alexandria

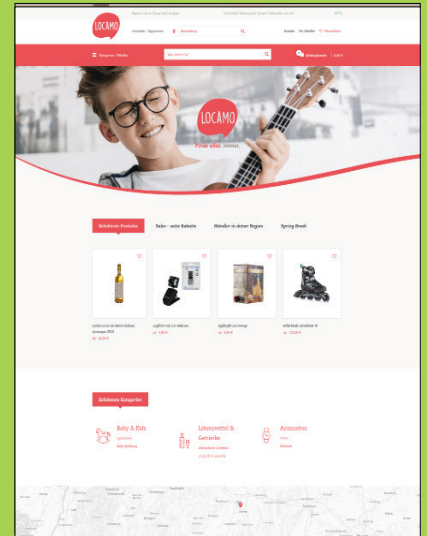
Target group
Local

Range of products
Specialist
(Food)

LOCAMO BETA

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
9/12	4/6	8/16	1/13	2/12	4/10	2/8	4/10	34/87



SCORE
5.34

URL
www.locamo.de

Country
Germany

City / Region
Ravensburg

Target group
Local

Range of products
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.

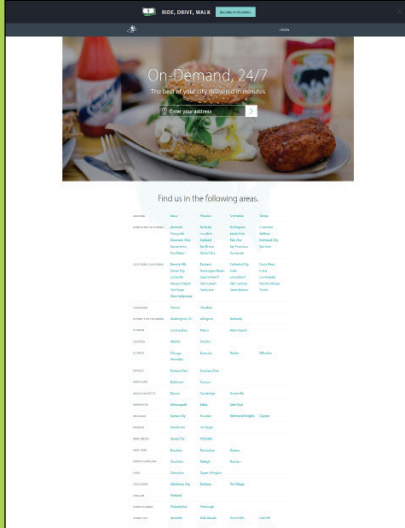


STORE LOCATOR PLATFORM

Overview of dealers.



POSTMATES



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
9/12	3/6	2/16	0/13	1/12	2/10	2/8	5/10	24/87



TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
5.24

URL
www.postmates.com

Country
USA

City / Region
Los Angeles et al.

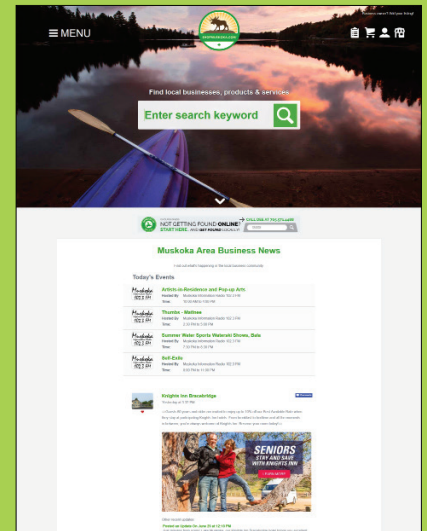
Target group
Local

Range of products
Generalist

SHOPCITY

SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
9/12	4/6	8/16	0/13	3/12	3/10	2/8	3/10	32/87



SCORE
5.32

URL
www.shopcity.com

Country
USA

City / Region
Muskoka

Target group
Local

Range of products
Generalist

TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.

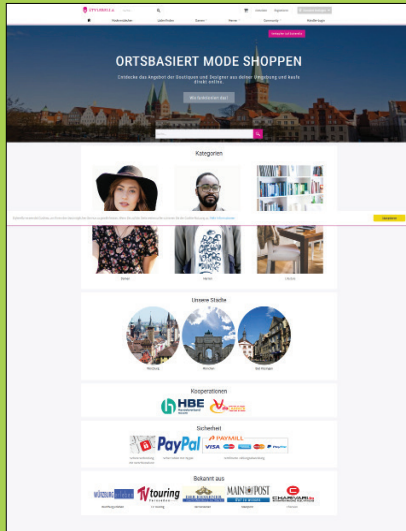


STORE LOCATOR PLATFORM

Overview of dealers.



STYLERELLA



SERVICE PROFILE

Platform architecture	Product presentation	Location-Enabled Services	Location-Based Services	Recommendation Services	Miscellaneous Services	Payment Services	Social Services	Total
10/12	5/6	9/16	2/13	3/12	3/10	2/8	7/10	41/87



TRANSACTION PLATFORM

Full online shop functionality, including payment and delivery processing.



RECOMMENDATION PLATFORM

Payment and delivery processing via partner shops.



PRODUCT ENQUIRY PLATFORM

Enquiring about products.



PRODUCT SEARCH PLATFORM

Checking products and prices.



STORE LOCATOR PLATFORM

Overview of dealers.

SCORE
5.41

URL
www.stylerella.de

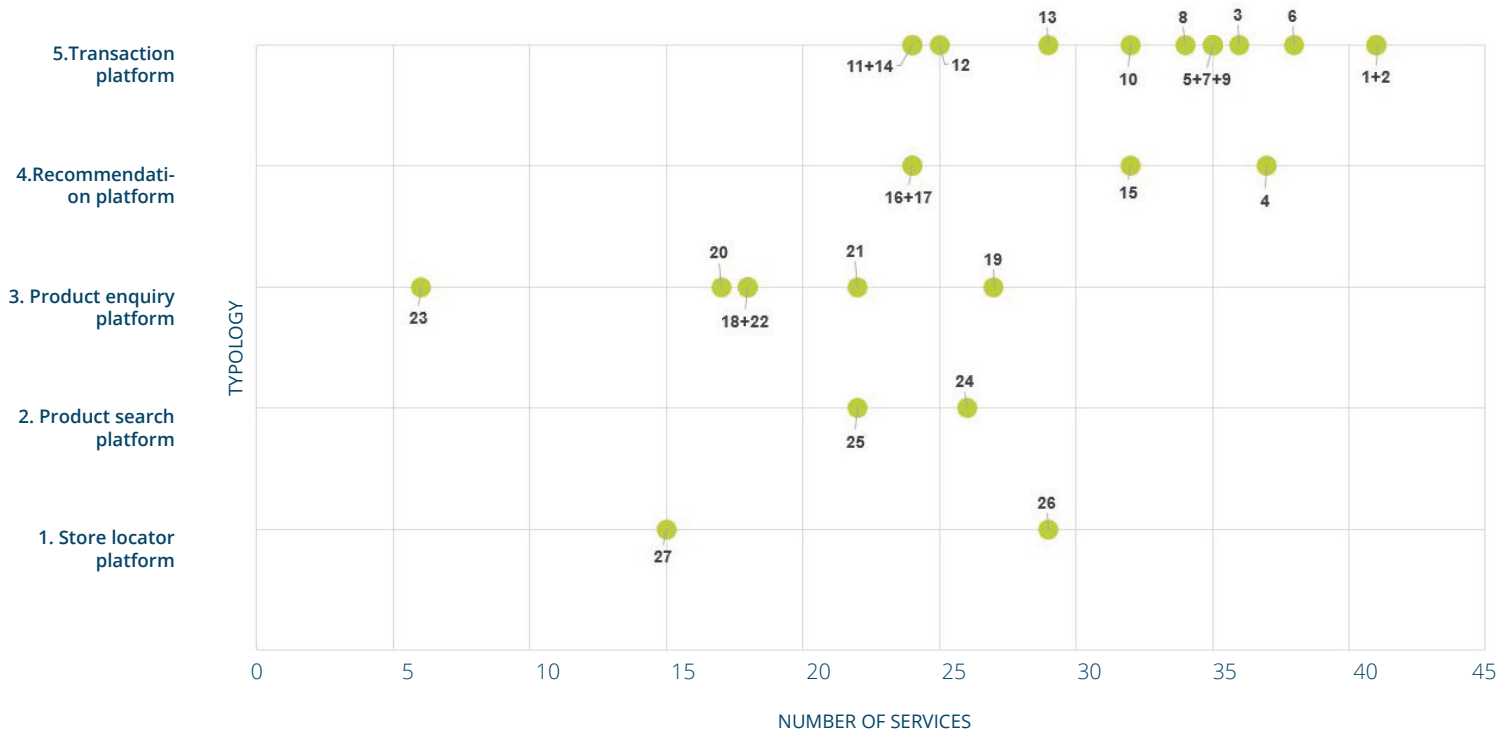
Country
Germany

City / Region
Würzburg, München,
Bad Kissingen

Target group
Local / Supra-regional

Range of products
Specialist (Fashion)

3.5 Matrix - Distribution by "Total Score"



LEGEND

- | | | |
|------------------|------------------------|---------------------------|
| 1. Klickando | 11. Kiezkaufhaus | 21. Marktplatz Bruchköbel |
| 2. Stylerella | 12. Localharvestmarket | 22. Take-it-Local |
| 3. Hierbeidir | 13. Beiuns.kaufen | 23. Kaufnah BETA |
| 4. Loca Fox | 14. Postmates | 24. RN-Shopping |
| 5. Atalanda | 15. Koomio | 25. Lieblingsladen |
| 6. Farmy.ch | 16. Mein Jülich | 26. Findeling |
| 7. Kaloka | 17. Snipda | 27. Yategolocal |
| 8. Locamo BETA | 18. Digitale City | |
| 9. Buchhandel.de | 19. Locally | |
| 10. Shopcity | 20. Arranja | |

Discussion of the Total Score Matrix

The matrix presented above indicates that only very few local shopping platforms currently on the market use only the most basic transaction level. Only two platforms limit themselves to the function scope of store locator (1) and product search platform (2). Six platforms offer the function scope of level (3) product enquiry platform and four other platforms provide the function scope (4) recommendation platform. Out of the 27 platforms 10, i.e., more than one third, and overall the most common platform type correspond to level (5) transaction platform in terms of their function scope.

The resulting matrix indicates that platforms on a higher function scope level also tend to increase the number of services they offer. The majority of platforms of types (1) to (3) tend to range below 25 services offered, while most of the platforms of type (4) and (5) offer more than 25 different services.

Overall this represents a strong functional performance of the platforms and this indicates that this strong functional performance tends to go hand in hand with an increased number of services.

3.6 Table sorted by "Function Score"

	Typology	Total	Platform architecture (12)	Product presentation (6)	Location-Enabled Services (16)	Location-Based Services (13)	Recommendation Services (12)	Miscellaneous Services (10)	Payment (8)	Social Engagement (10)
Stylereella	5	41	10	5	9	2	3	3	2	7
Klickando	5	41	8	5	8	0	3	5	5	7
Farmy.ch	5	38	10	6	5	0	3	4	4	6
Loca Fox	4	37	9	4	6	3	6	3	0	6
Hierbeidir	5	36	8	4	6	0	2	4	6	6
Atalanda	5	35	9	4	6	0	3	4	3	6
Kaloka	5	35	9	4	6	0	3	5	3	5
Buchhandel.de	5	35	10	4	6	3	2	1	5	4
Locamo BETA	5	34	9	4	8	1	2	4	2	4
Shopcity (Shoplocally)	5	32	9	4	8	0	3	3	2	3
Koomio	4	32	6	5	7	2	3	1	0	8
Beiuns.kaufen	5	29	11	4	3	0	3	2	3	3
Findeling	1	29	9	3	4	4	0	3	0	6
Locally	3	27	9	3	4	0	5	1	0	5
RN-Shopping	2	26	9	4	5	2	3	2	0	1
Localharvestmarket	5	25	8	3	3	0	5	4	1	1
Postmates	5	24	9	3	2	0	1	2	2	5
Kiezkaufhaus	5	24	6	4	2	0	2	5	2	3
Mein Jülich	4	24	6	4	4	0	2	2	0	6
Snipda	4	24	8	4	5	1	2	1	0	3
Marktplatz Bruchköbel	3	22	7	4	7	0	2	1	0	1
Lieblingsladen.de	2	22	7	3	4	0	3	2	0	3
Take-it-lokal.de	3	18	5	4	3	0	1	1	4	0
Digitale City	3	18	2	1	4	0	0	6	1	4
Arranja	3	17	3	0	2	0	1	5	1	5
Yategolocal	1	15	8	0	3	0	2	0	0	2
Kaufnah BETA	3	6	3	0	0	0	0	0	0	3

Amazon	58	10	6	4	0	10	6	7	10
Ebay	46	11	6	2	0	3	4	5	10
Rakuten	40	10	6	1	0	2	2	5	9

Legend

LOW		MEDIUM		HIGH
-----	--	--------	--	------

Explanation of the Function Score Table

The table presented above sorts the platforms according to the number of services offered. The color coding describes how active the platforms are in the different service categories, from very active (green) to fairly active (yellow) to not at all active (red).

It becomes evident that services of the location-based category are being neglected. While location-enabled services are at least offered by a small percentage of platforms, location-based services are virtually non-existent. This means that a potentially very profitable route is being ignored. Location-enabled services are the factor that would enable shopping platforms to use their time and cost advantage against the pure players, i.e., the fact that they can offer in-store services easily.

The platform architecture is by and large modern and corresponds to the standards of mobile internet access. The product presentation is also attractive and user-friendly.

But recommendation services, i.e., pointing customers towards additional or alternative products to the ones they are searching for, are only very rarely provided. This means that potentially lucrative up-selling potentials, i.e., selling higher value products and making additional sales, remain untapped.

The payment options offered on local shopping platforms are also very limited, which is one aspect where they are left behind by the big E-commerce players.

But the presence in social networks of shopping platforms is good, with facebook being the mainly used social network.

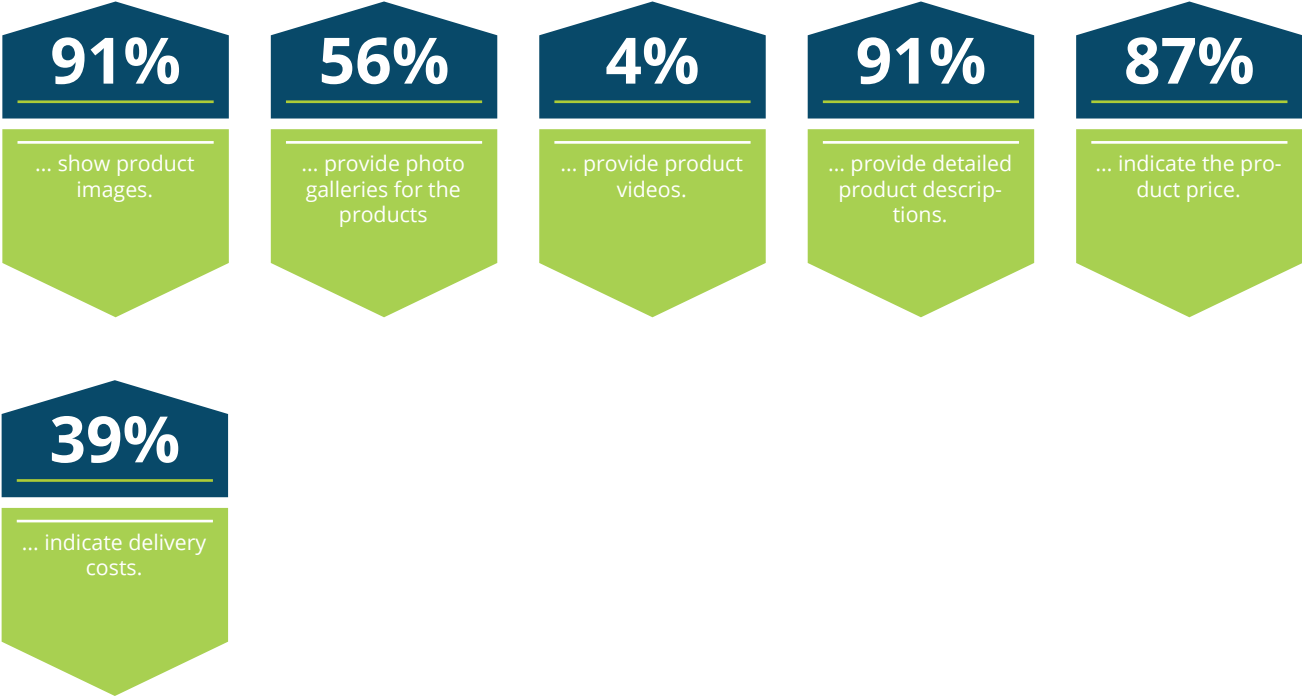
FACTS & FIGURES

4. FACTS & FIGURES

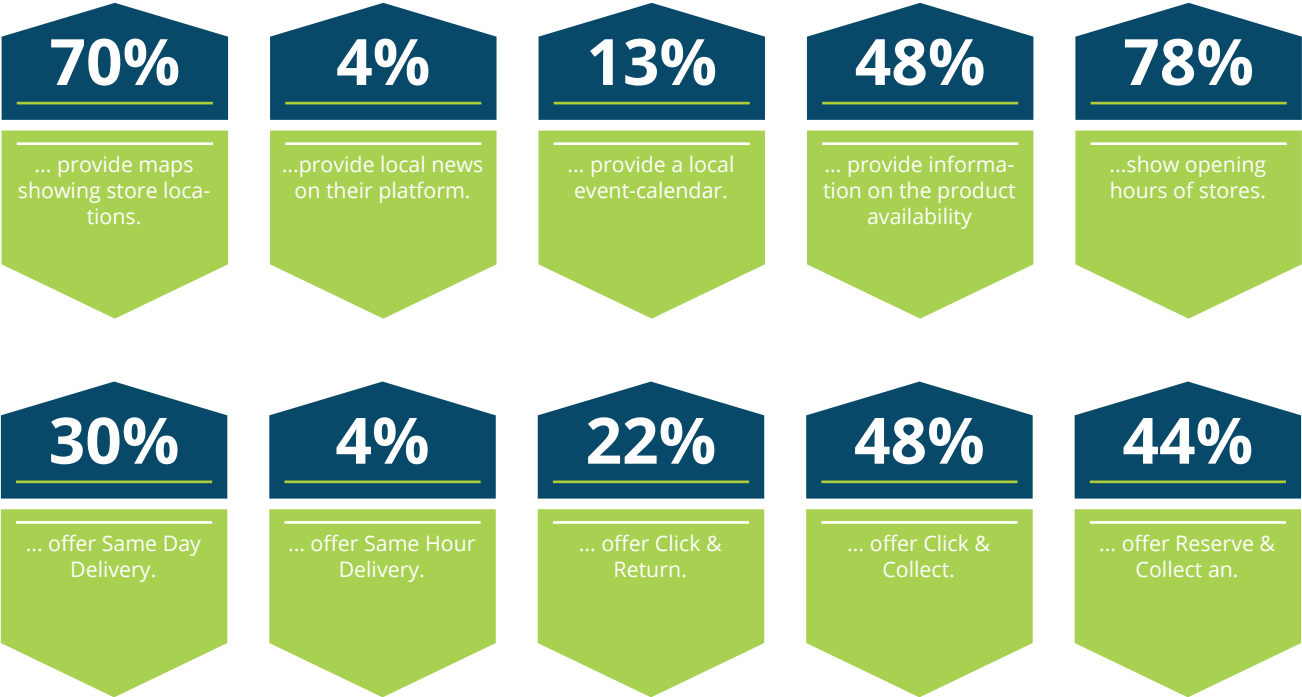
CATEGORY 1: PLATFORM ARCHITECTURE



CATEGORY 2: PRODUCT PRESENTATION



CATEGORY 3: LOCATION-ENABLED SERVICES





CATEGORY 4: LOCATION-BASED SERVICES



CATEGORY 5: RECOMMENDATION SERVICES



CATEGORY 6: OTHER SERVICES



CATEGORY 7: PAYMENT SERVICES



CATEGORY 8: SOCIAL ENGAGEMENT

39%

... have an own blog.

48%

... send newsletters.

91%

... have a Facebook fan page.

82%

... have a Twitter account.

30%

... can be found on Pinterest.

44%

... have a Google+ account.

13%

... use WhatsApp.

26%

... have a YouTube channel.

9%

... can be found on LinkedIn.

35%

... use Instagram.

CUSTOMER SURVEY

5. CUSTOMER SURVEY

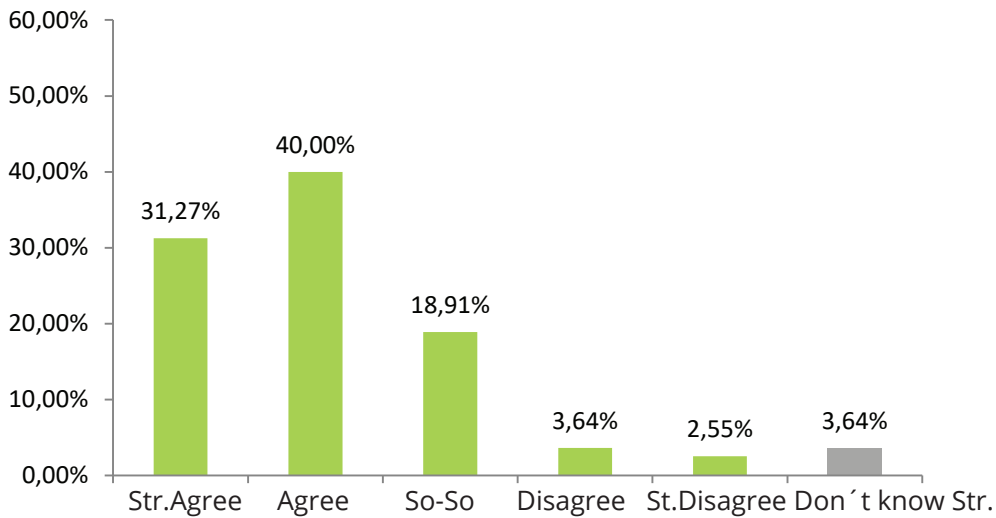
In addition to the platform analysis, a customer survey was conducted in the town of Soest. There were 275 participants aged from 18 to 65. The survey comprised 28 questions, organized into the following six groups:

1. Interest in buying from a local shopping platform (3 questions)
2. Attitude towards local shopping platforms (3 questions)
3. Willingness to pay for location-dependent services on local shopping platforms (6 questions)
4. Usefulness of local shopping platforms. (4 questions)
5. Usefulness of location- enabled services on local shopping platforms (6 questions)
6. Usefulness of location- based services on local shopping platforms (6 questions)

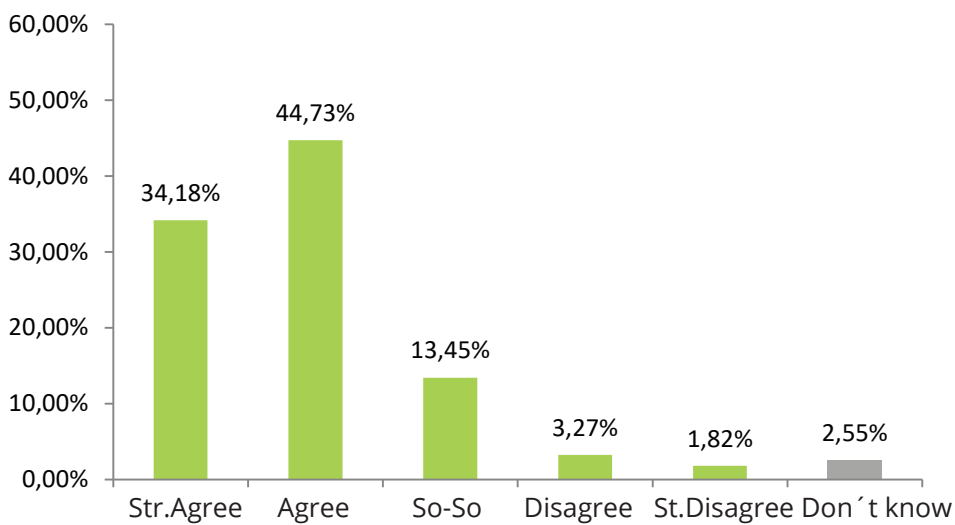
5.1 Results of Customer Survey

1. Interest in Buying from Local Shopping Platforms

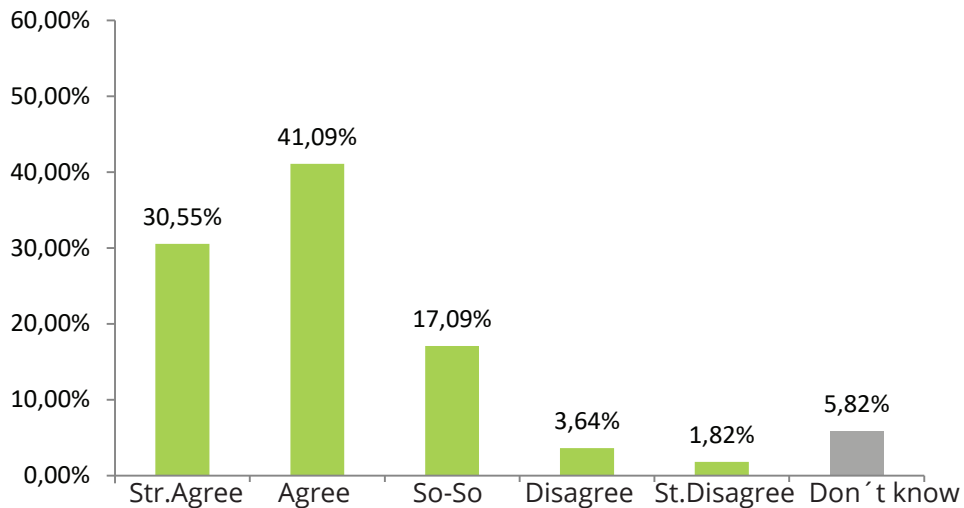
Question 1.1: I would like to buy from a local shopping platform (Wish)



Question 1.2: I will consider buying from local shopping platforms. (Option)



Question 1.3: If I have the opportunity I will buy from a local shopping platform.
(If available)

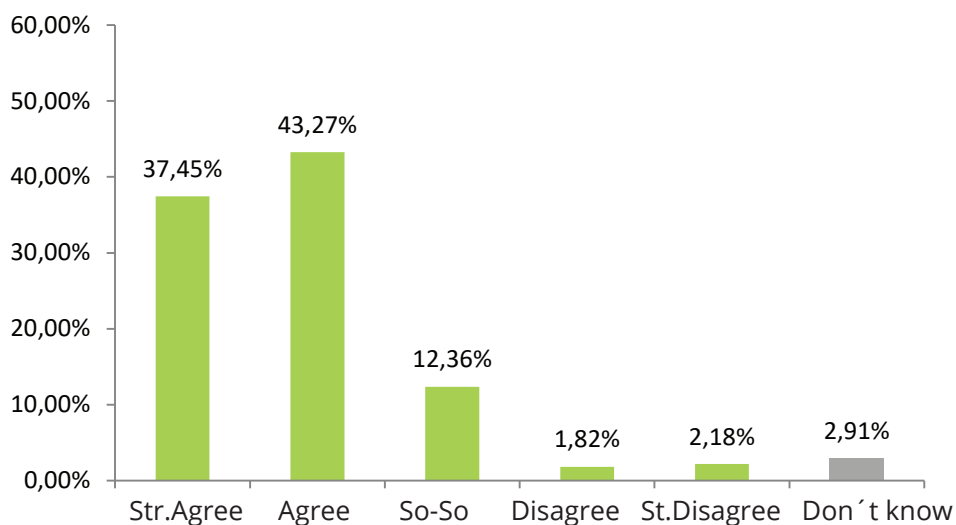


Results from question group 1:

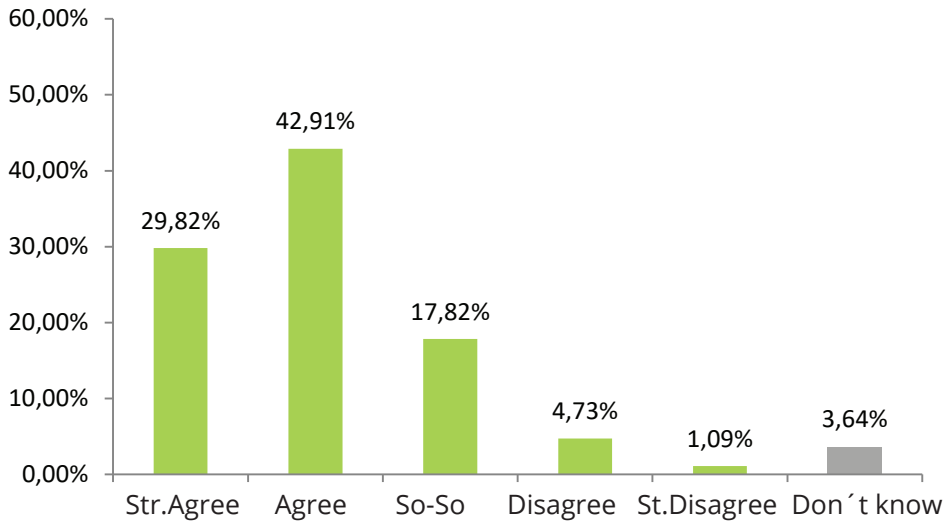
More than 70% of survey participants are willing to buy from a local shopping platform.

2. Attitude towards local shopping platforms

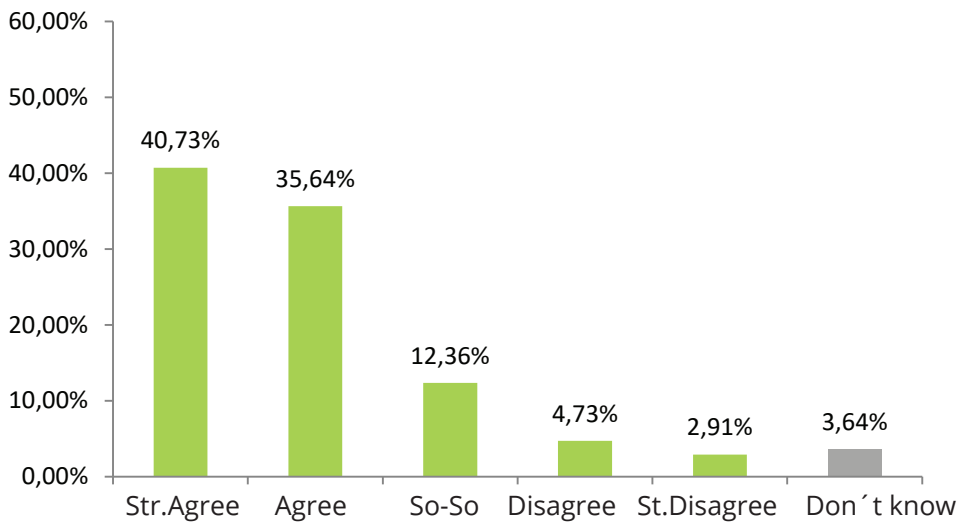
Question 2.1: I believe a shopping platform grouping together several local dealers is an attractive concept.



Question 2.2: I believe a local shopping platform is useful for me.



Question 2.3: A local shopping platform is a welcome addition to the shopping options in my city.

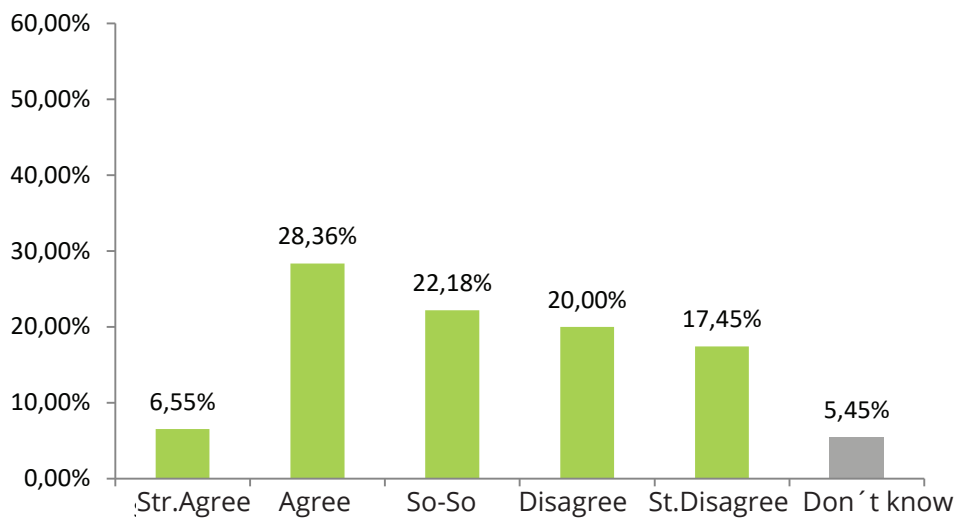


Results from question group 2:

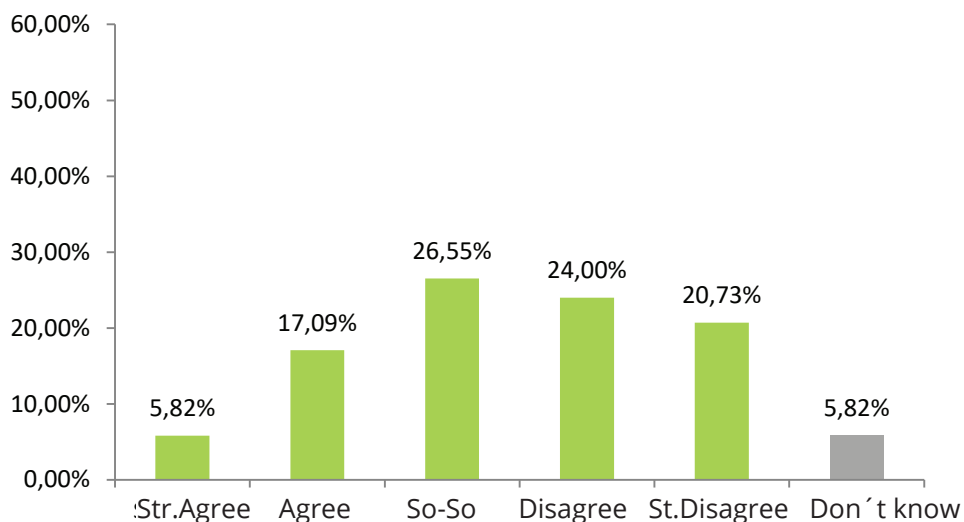
More than 70% of survey participants report a positive attitude towards local shopping platforms.

3. Willingness to pay for location-dependent services on local shopping platforms.

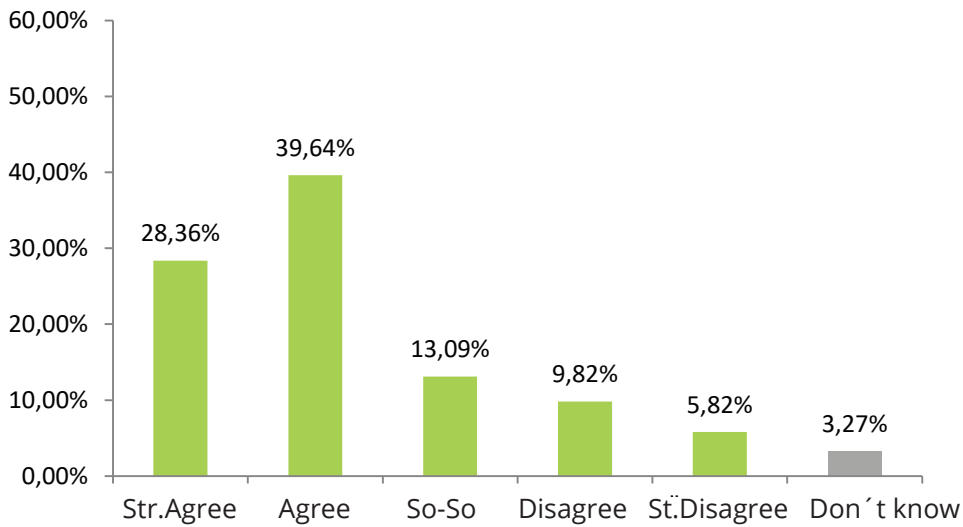
Question 3.1: Would you be willing to pay higher prices on local shopping platforms than on competition sites in return for location-based information services (user fee)?



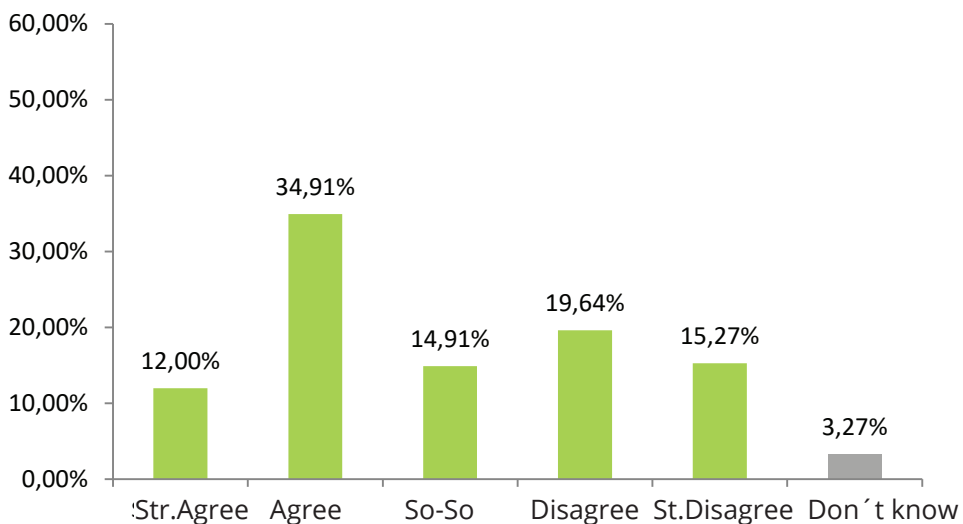
Question 3.2: Would you be willing to pay higher prices on local shopping platforms than on competition sites in return for location-based navigation services (user fee)?



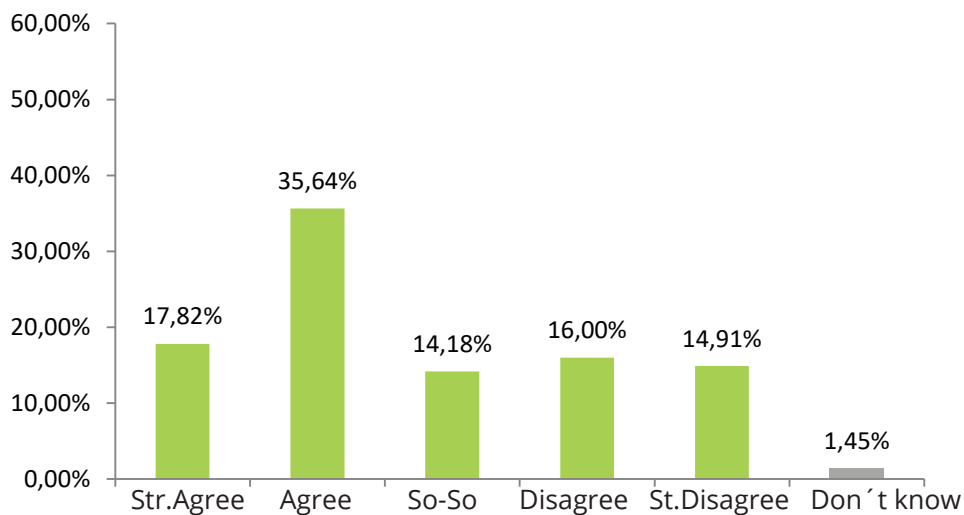
Question 3.3: Would you be willing to pay a higher price (delivery costs) on a local shopping platform than on a competition platform for Same Day Delivery?



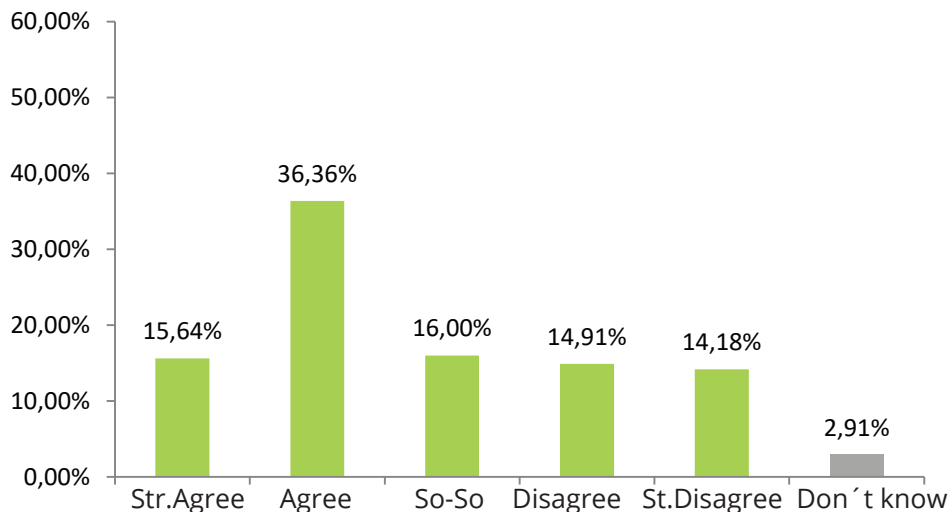
Question 3.4: Would you be willing to pay higher prices on local shopping platforms than on competition sites in return for Click & Collect services (user fee)?



Question 3.5: Would you be willing to pay higher prices on local shopping platforms than on competition sites in return for Click & Return services (user fee)?



Question 3.6: Would you be willing to pay higher prices on local shopping platforms than on competition sites in return for buying online but receiving in-store consultation services (user fee)?

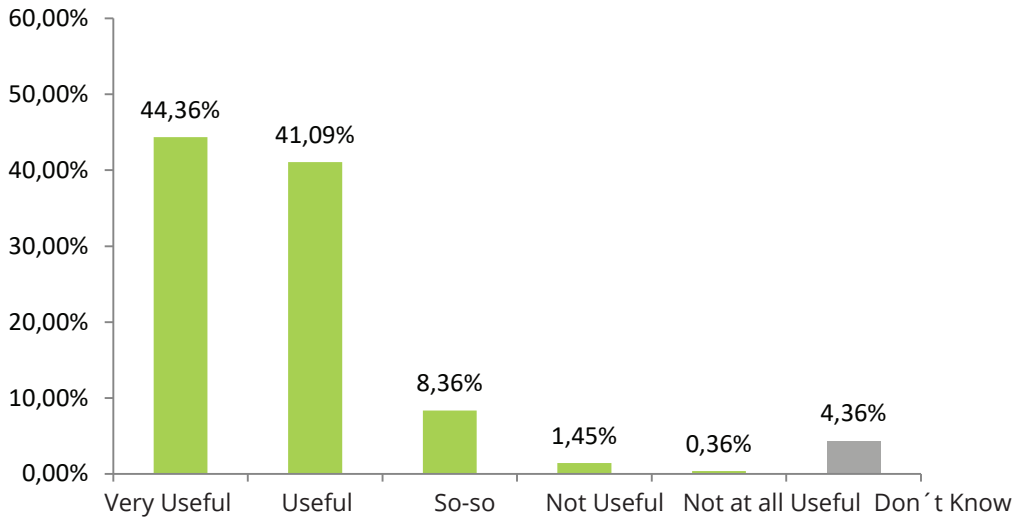


Results from question group 3:

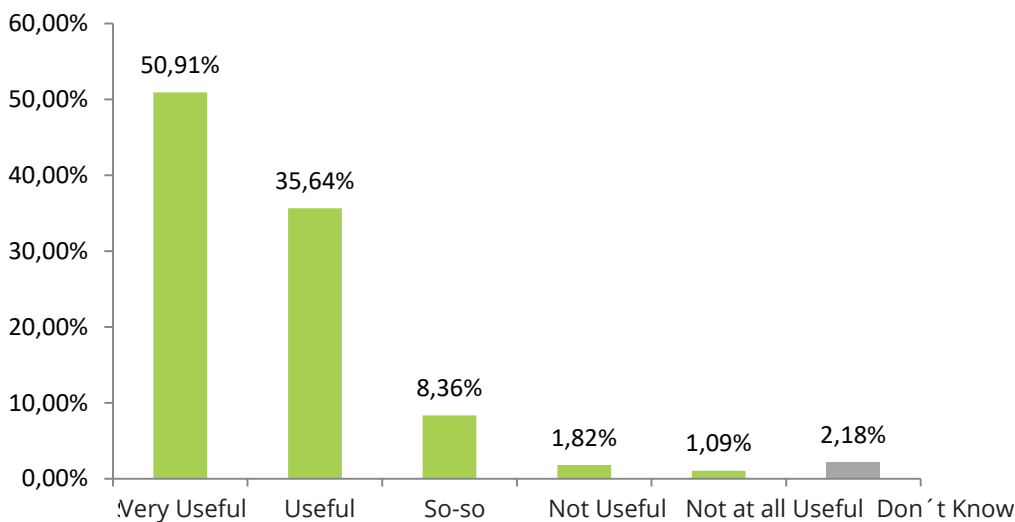
More than 60% of survey participants are willing to pay an additional fee for Same Day Delivery. Only very few participants report a willingness to pay for navigation and information services.

4. Usefulness of local shopping platforms

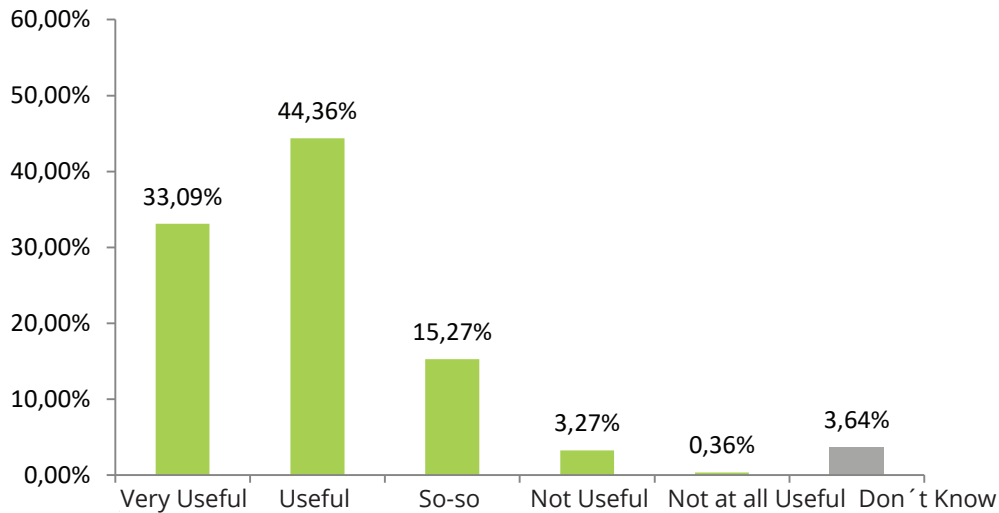
Question 4.1: How useful is the fact that local shopping platforms provide an overview of products available at local dealers?



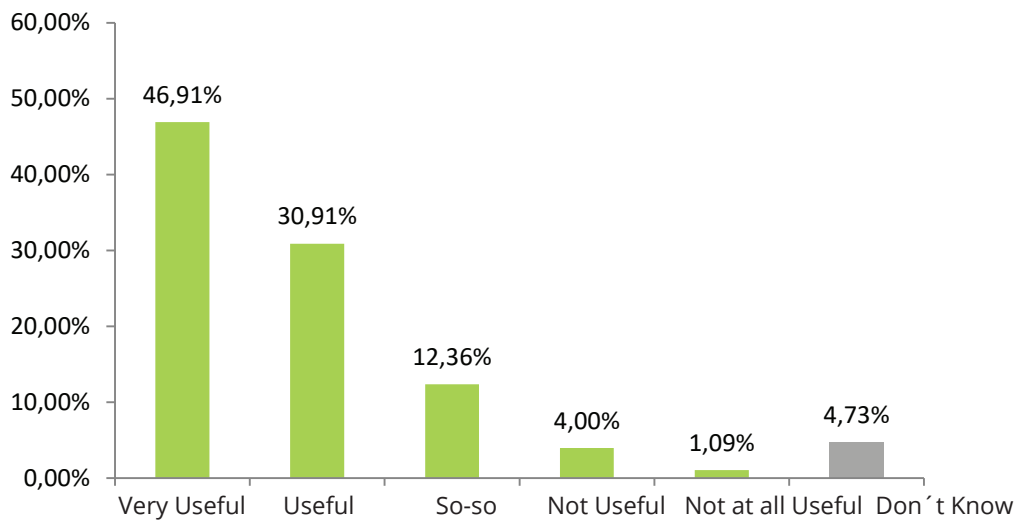
Question 4.2: How useful is the fact that local shopping platforms provide online access to stores that are nearby?



Question 4.3: How useful is the fact that local shopping platforms give you the opportunity to find out about stores that are nearby?



Question 4.4: How useful is the fact that buying from local shopping platforms will enable you to support local businesses?

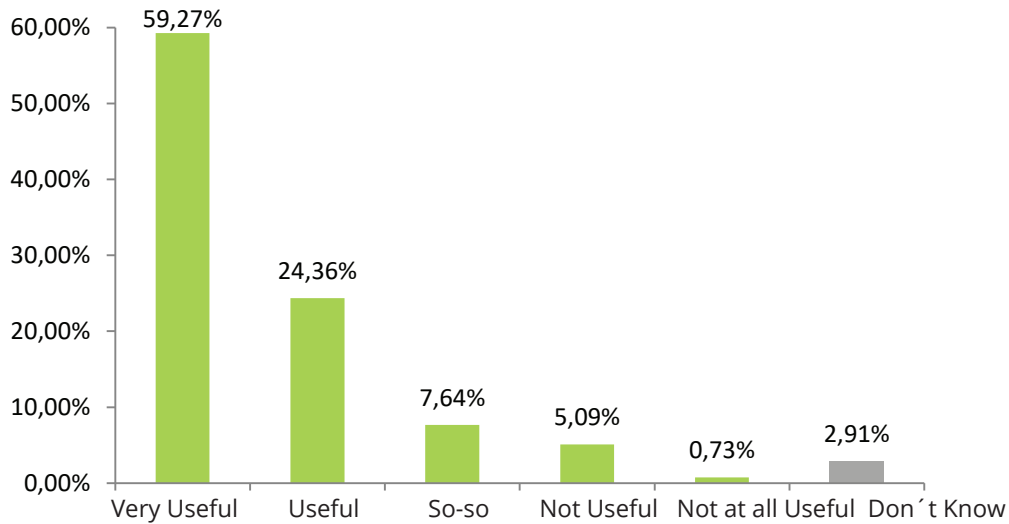


Results from question group 4:

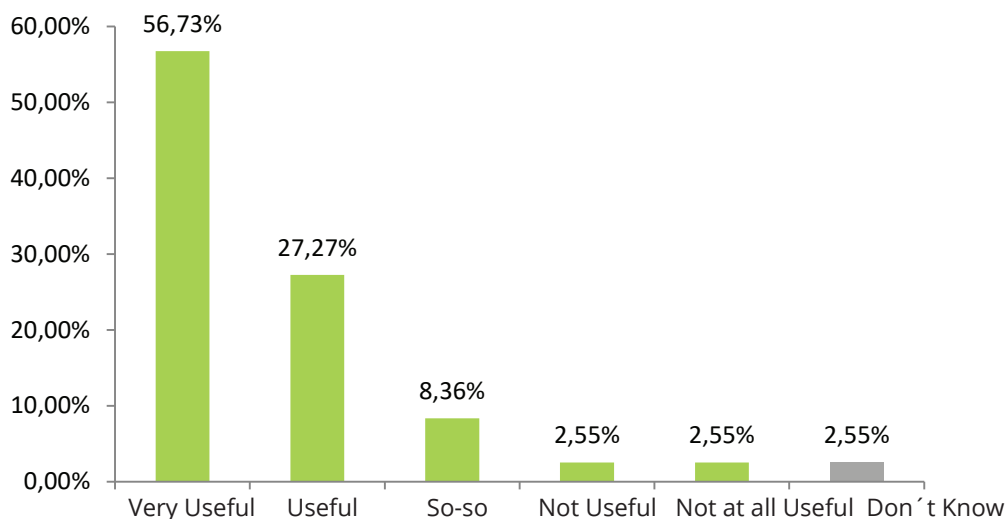
More than 70% of survey participants see local shopping platforms as useful both for themselves and for their town.

5. Usefulness of location-enabled services

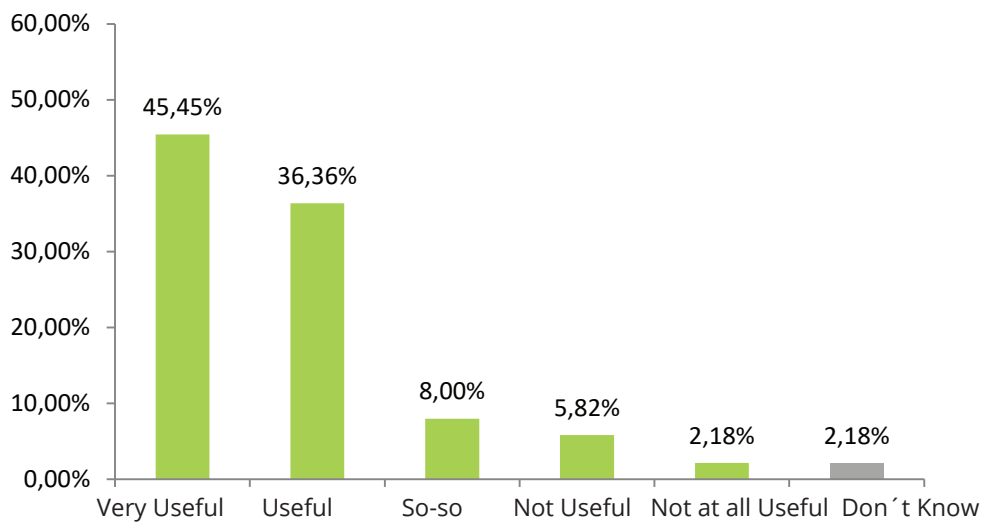
Question 5.1: How useful is Same Day Delivery on local shopping platforms in your view?



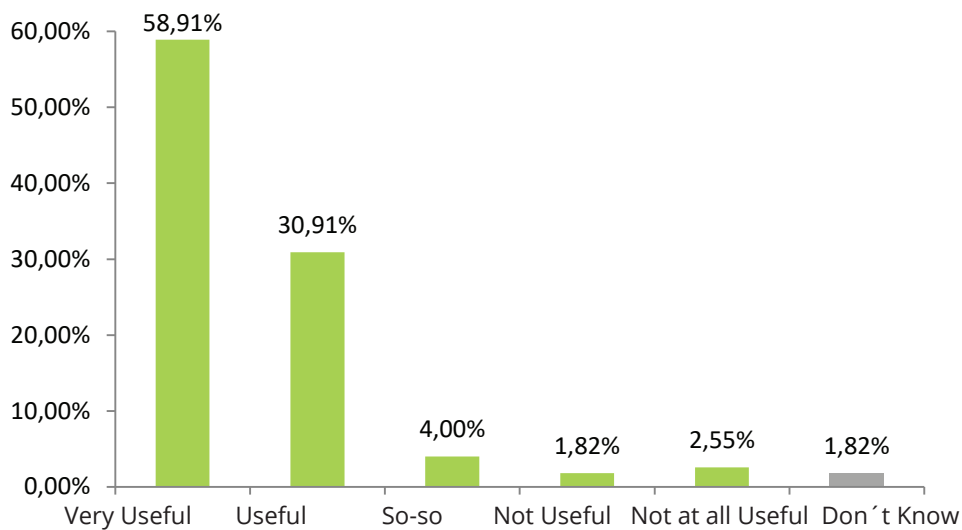
Question 5.2: How useful is information on availability in store provided on local shopping platforms in your view?



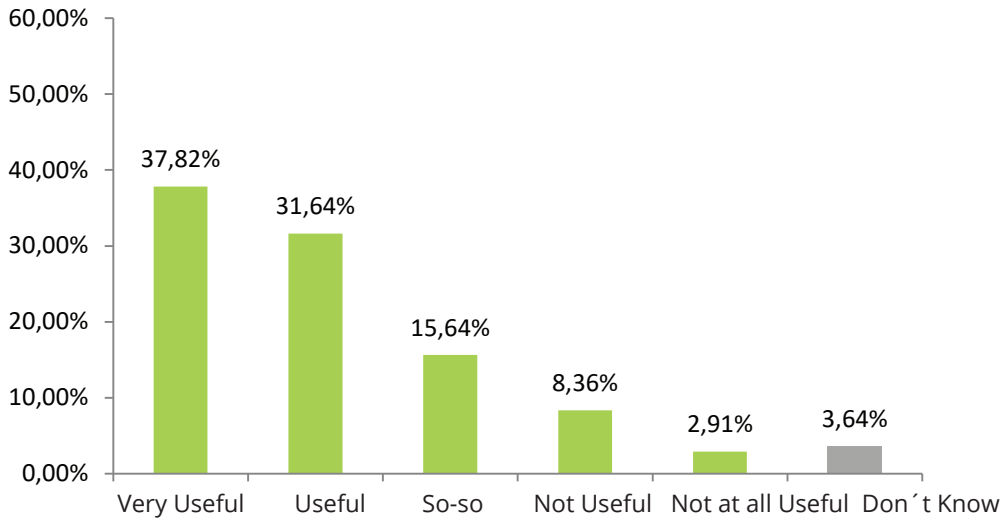
Question 5.3: How useful is Click & Collect on local shopping platforms in your view?



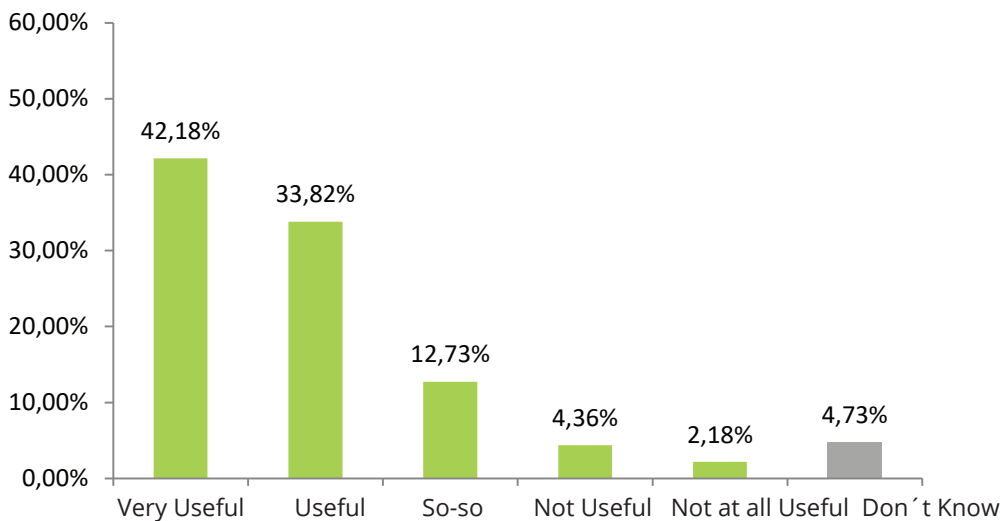
Question 5.4: How useful is Click & Return on local shopping platforms in your view?



Question 5.5: How useful are cross-dealer loyalty schemes/ loyalty cards on local shopping platforms in your view?



Question 5.6: How useful is buying online but receiving in-store consultation provided by local shopping platforms in your view?

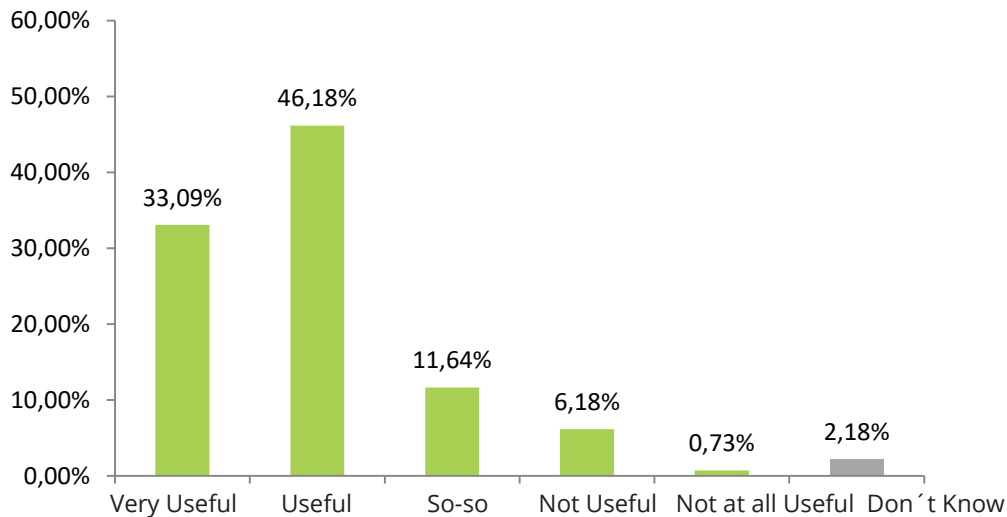


Results from question group 5:

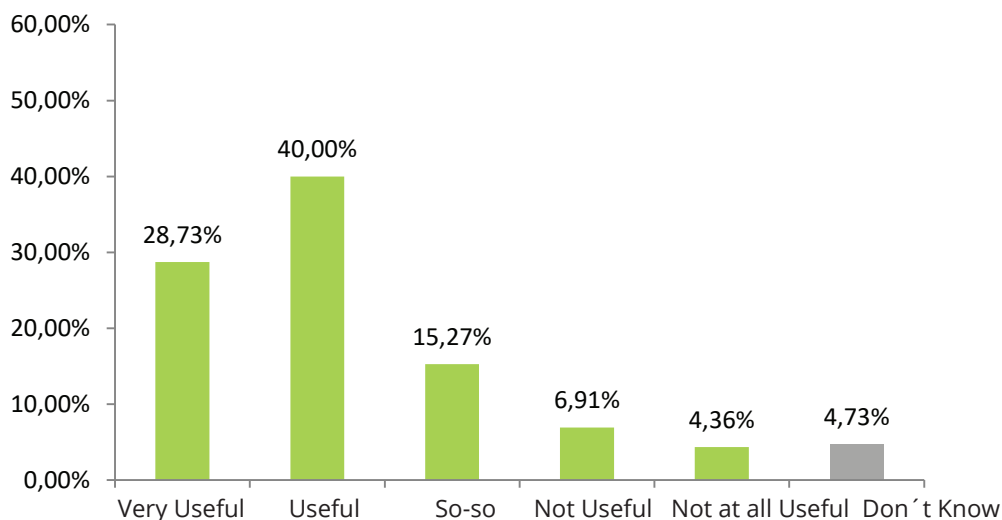
Overall survey participants see location-enabled services as very useful. Same Day Delivery, In-Store Availability and the ability to Click & Return were seen as particularly useful.

6. Usefulness of location-based services

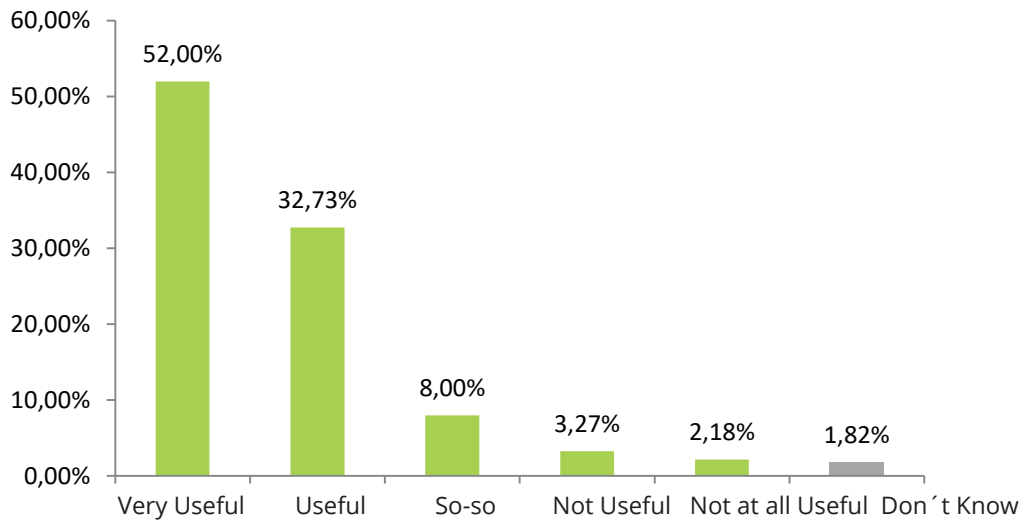
Question 6.1: How useful are location-based information services (such as product information, recommendations) on local shopping platforms in your view?



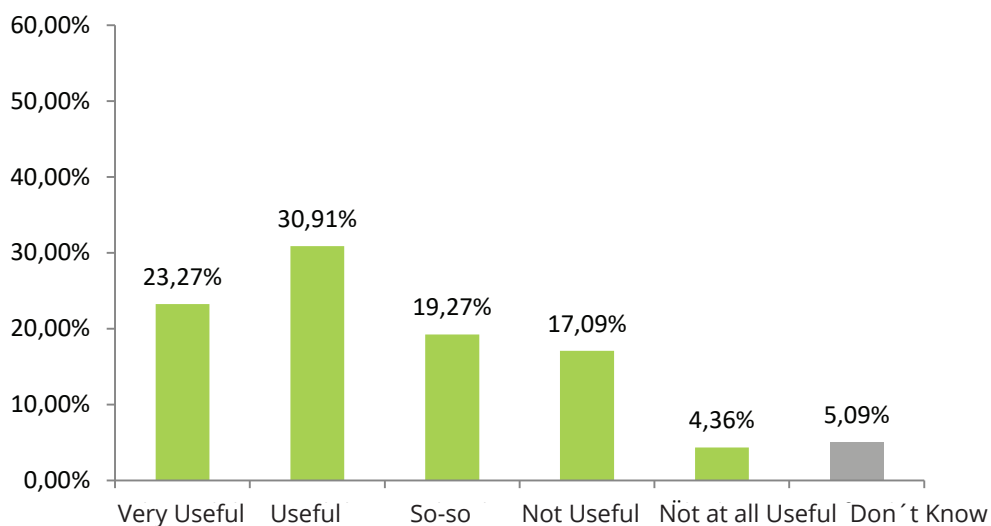
Question 6.2: How useful are location-based advertisements on local shopping platforms in your view?



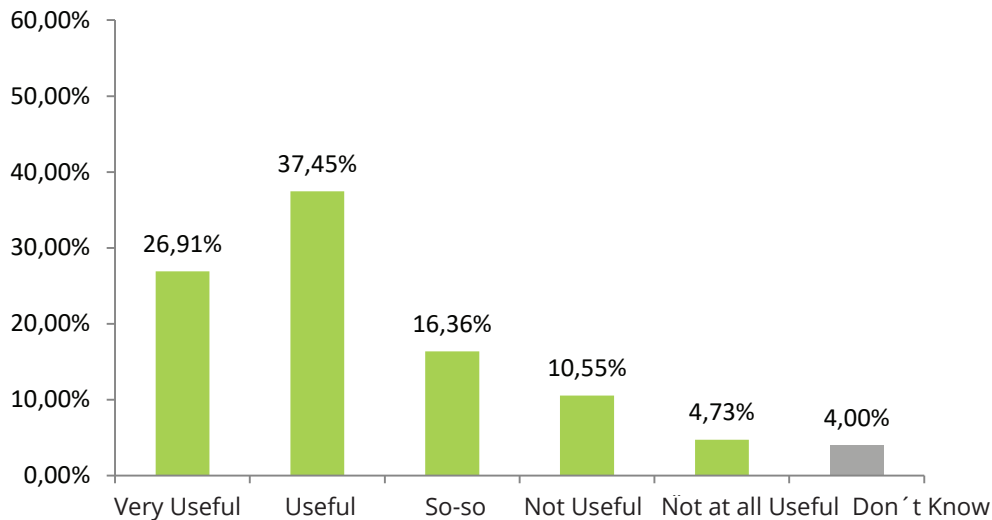
Question 6.3: How useful are location-based discounts on local shopping platforms in your view?



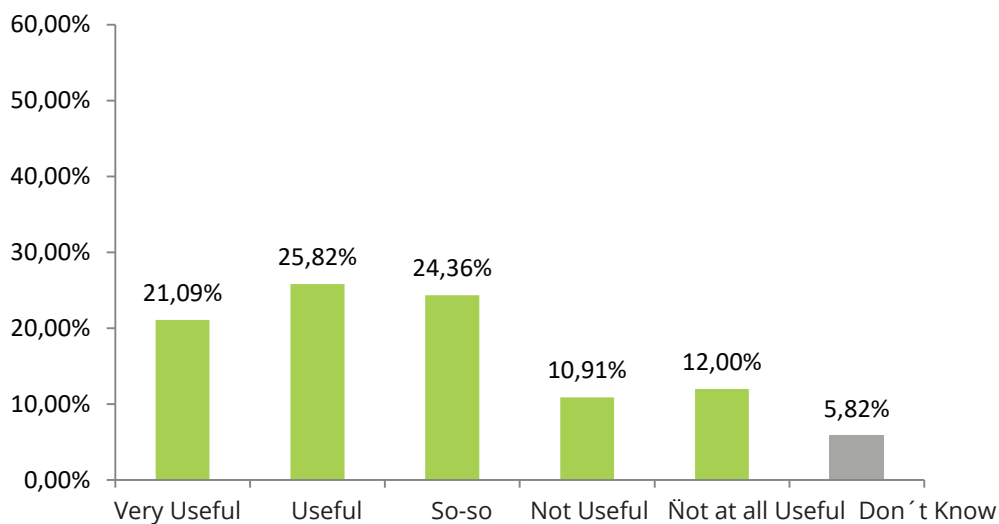
Question 6.4: How useful are location-based navigation services (such as in-store navigation) on local shopping platforms in your view?



Question 6.5: How useful are location-based loyalty schemes on local shopping platforms in your view?



Question 6.6: How useful are location-based prize-draws on local shopping platforms in your view?



Results from question group 6:

Overall survey participants see location-based services as useful. Location-based product informations and recommendations as well as location-based discounts were seen as particularly useful.

5.2 Summary of Survey Results

- Customers are willing to buy from local shopping platforms.
- Customers have a positive attitude towards local shopping platforms.
- Customers view local shopping platforms as useful.
- Customers view location-enabled services on local shopping platforms as useful.
- Customers view location-based services on local shopping platforms as useful.
- Same Day Delivery is seen as particularly useful and customers are willing to pay extra for this service.
- Information on product availability in-store is seen as very useful.

6. CONCLUSION & RECOMMENDATIONS

The number of local shopping platforms continues to grow very fast. But as this development is still very recent, it is not yet possible to provide a reliable analysis of the profitability prospects of these platforms. However, it can be stated that customers' shopping behavior as well as the well-established pure player competition such as Amazon and Ebay as well as the lack of digitalization knowledge of some LOOROs pose considerable challenges for local shopping platforms.

Some weaknesses of the local shopping platforms identified in our study are the low level of channel integration and the low uptake of making use of the LOOROs location advantages and of referring to and making use of the dealers' stores. The dealers' proximity to their customers offers a lot of potential advantages, which are not available to the established pure online players. If local shopping platforms and LOOROs worked more closely together, they could make use of these potential benefits. One area of cooperation is for local shopping platforms to cover the period when LOOROs would be closed, in the evenings and on weekends. In return, LOOROs can offer their stores as a showroom for products and as decentralized storage. The stores can also be used to offer customers personal shopping consultation as well as for returning unwanted items. Local shopping platforms can also do more than just serve as an out-of-hours shopping option. They can use their very good digitalization knowledge to support LOOROs in making the transformation to offering digitalized transactions. This is also very much in the interest of the local shopping platforms, as the forecast of falling numbers of LOOROs would also reduce the product range of local shopping platforms and would also endanger their long-term existence. Sustainable growth for local shopping platforms is only possible if they support and strengthen LOOROs.

Local shopping platforms and LOOROs must start viewing their business models and their retail outlets as one big joint network and must work towards creating a joint service architecture from which both sides can profit. Location dependent services can play a very big role in this new local network, but they play only a very minor role in the cooperation between LOOROs and local shopping platforms so far. Figure 3 describes the possible interaction of the parties involved.

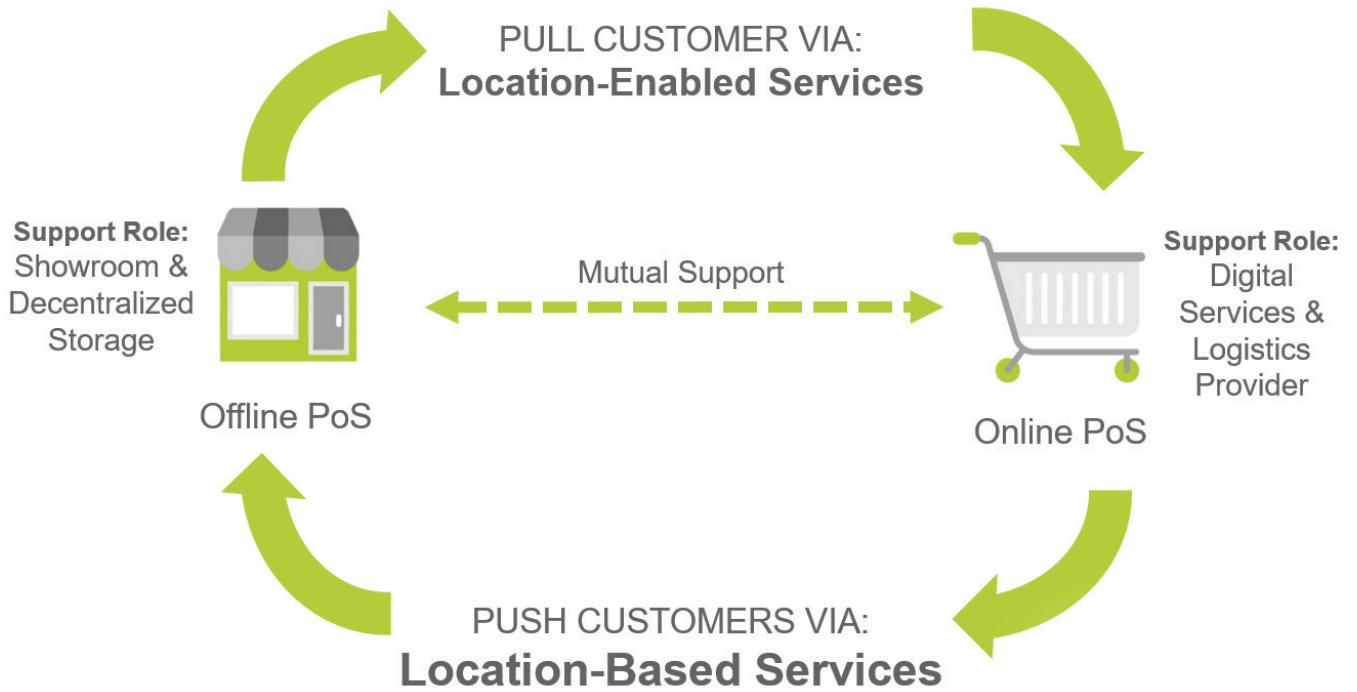


Figure 3 - Omnichannel service cycle

7. Appendix

7.1 Literature, References and Image Sources

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