

NEW STRATEGIES FOR SUSTAINABLE GROWTH 1-2 APRIL 2014 MELBOURNE, AUSTRALIA



# Strategies to Manage Supply

Virtual Supply: E-commerce as a way to market



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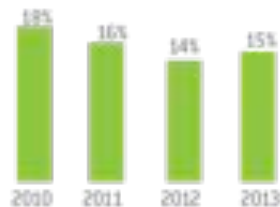
## Global Growth Overview

### United States



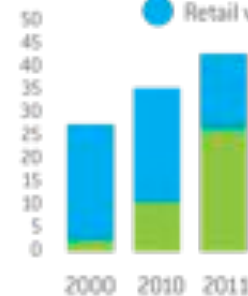
### United Kingdom

UK B2C E-Commerce Sales Growth,  
2010-2013, % change

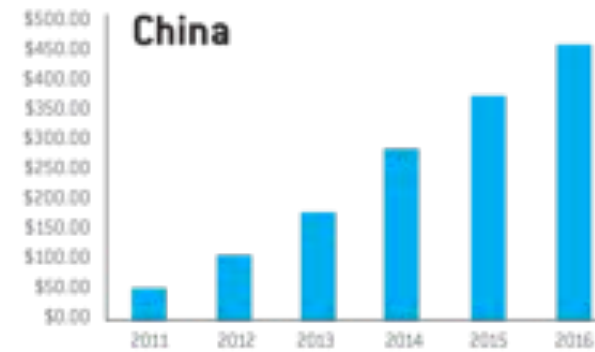


### India

● E-Commerce  
● Retail visitors



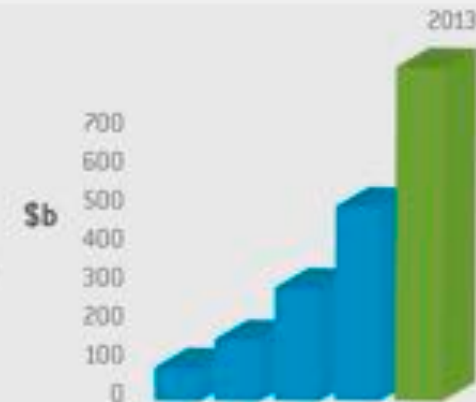
### China



### OVERALL

#### Worldwide E-Commerce Growth 2013

Overall E-Commerce growth rate for year 2013, B2C sales  
grow up to **21.1%** to top **\$1 trillion** for the  
first time B2C sales.



Source: IPSOS, IBIS Global Business



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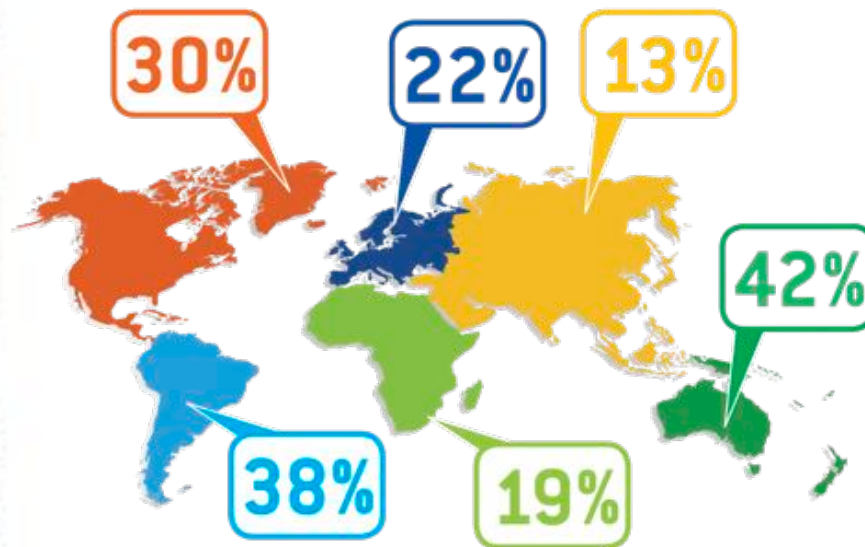


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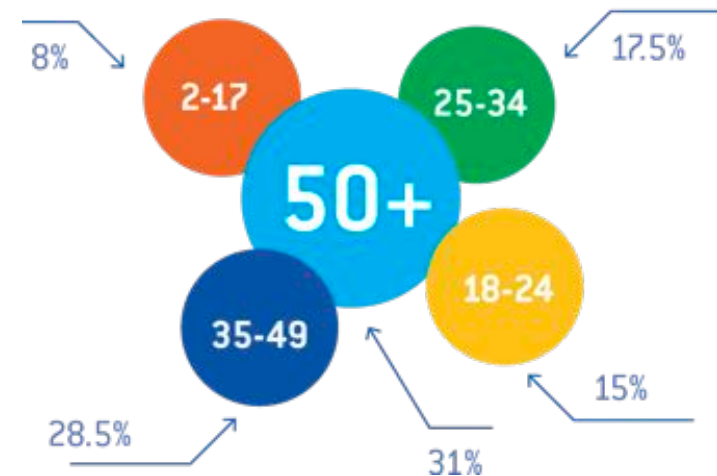
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## Global uptake of Mobile Technology

MCommerce Growth in 2012



Australian mobile audience by age



26% of all smartphone users make purchases on their mobile.  
17% of users changed their purchase decision.

Source: IPSOS/google internal data. 2014. Source: 'Our Mobile Planet' <http://www.thinkwithgoogle.com/mobileplanet/en/>



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## Australian Internet Usage and E-Commerce

### AUSTRALIAN E-COMMERCE STATISTICS



**94%** of Australian population has access to internet - out of which

**79%** go online everyday and

**60%** multiple times a day.

### AUSTRALIAN E-COMMERCE SALES (in Billions)



### ONLINE PURCHASING BEHAVIOUR

- 7 out of 10 Australians purchased goods online in 2012
- Online selling makes up 31% of total selling activity

### COMMERCIAL VEHICLE INDUSTRY ONLINE BEHAVIOUR

- 92% of online – Workshops / independent service providers
- 81% look for suppliers of products or services online
- 75% pay for services and products online



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Source: Sensis e-Business Report 2012, transport census 2012 (sample 1808)

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## Social Media



**11.7 MIL 3.2 MIL**

- Company Profiles
- Link to supplier sites
- Industry Presence
- Recruitment
- Education



**2.5 MIL**

- Company Updates
- Industry news
- Opinion
- New product updates
- Link to blog



**0.8 MIL**

- Advertising
- Promotions
- Product Images

- More than 78% of the Australian population participate in social media

Source: [abs.gov.au/ausstats](http://abs.gov.au/ausstats) population: 23.4 million. 03/2014



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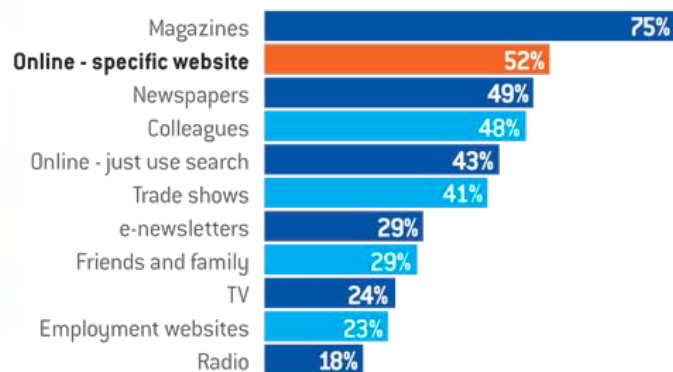
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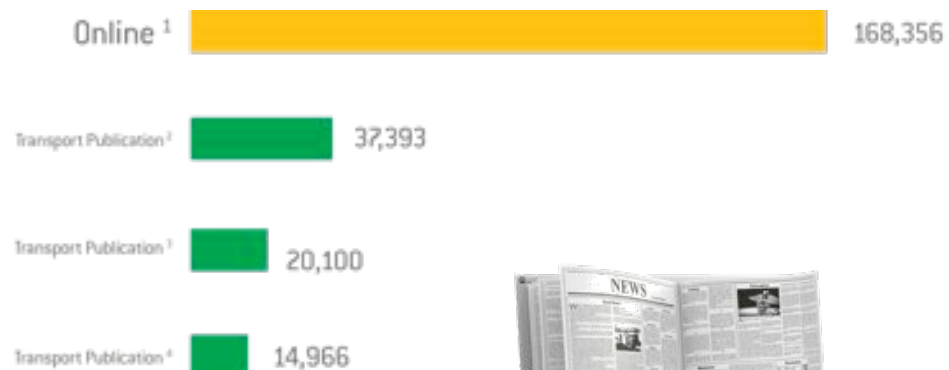


## Sources of information and audience reach

### SOURCES OF INFORMATION USED IN THE TRANSPORT INDUSTRY % of respondents



### ONLINE VS PRINT DISTRIBUTION



Source: Transport Census 2012. 1: Nielsen Site Census, Oct 2013 2: CAB Audit 2013 3: ABC Audit 2013 4: CAB Audit 2013



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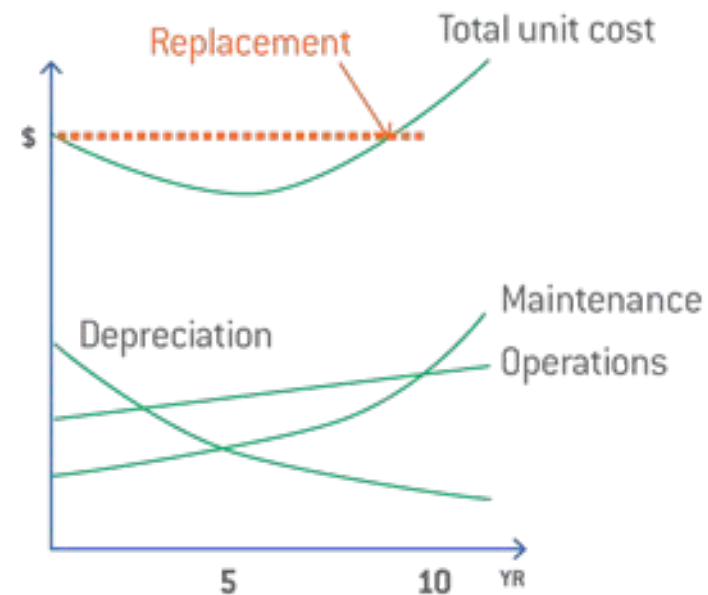
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## Why customers are turning to E-Commerce

- ✓ Reduced operating costs
- 📷 Convenience
- 🛒 Product availability
- 🔧 Consistent customer experience



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## Using E-Commerce to combat market forces

- ✓ Brand protection (Parallel imports)
- ✓ Pricing consistency and transparency
- ✓ Requirement for multi-channel distribution
- ✓ Better understanding our customer (Big Data)



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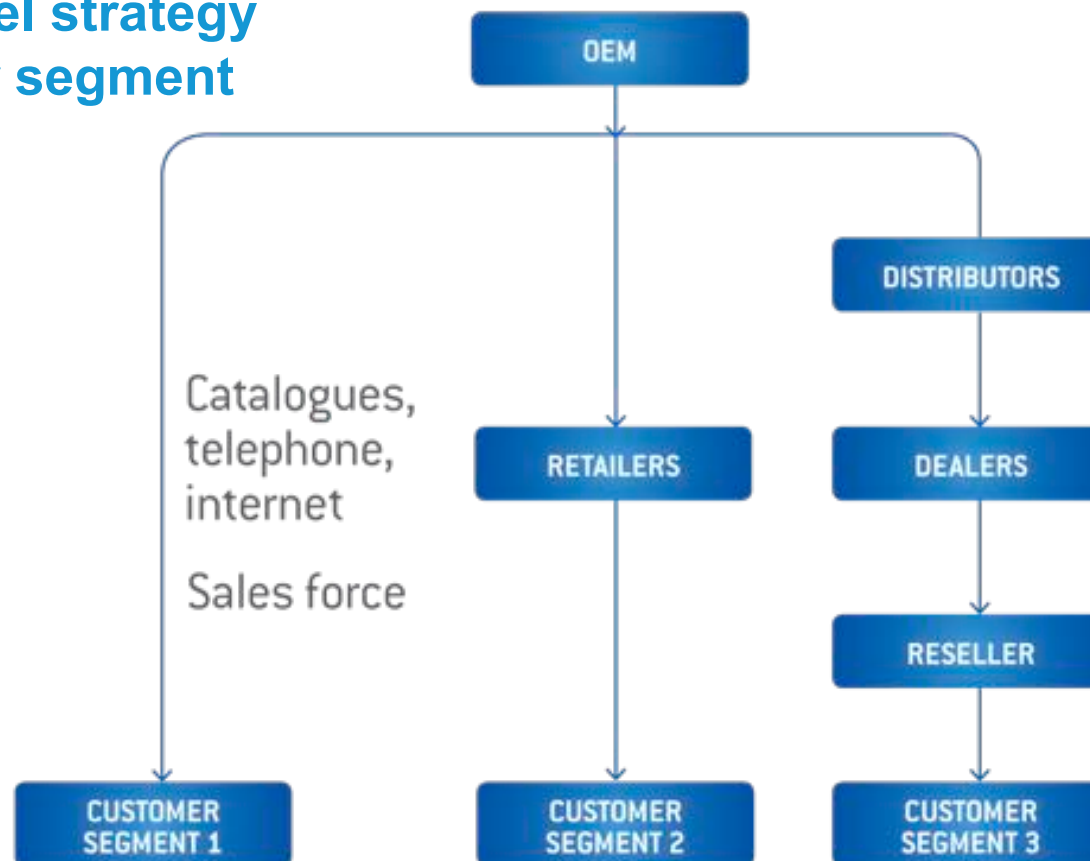


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## Multi-Channel strategy by customer segment



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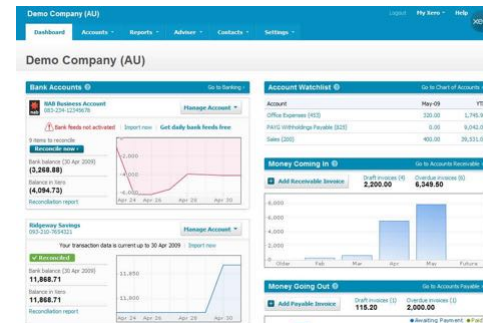
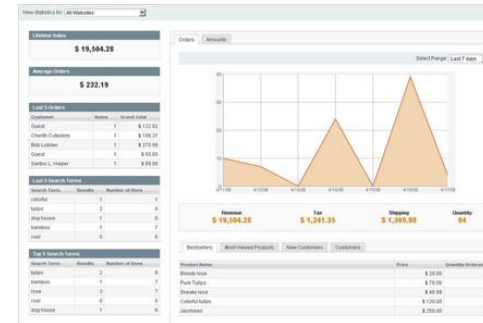
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## Using data to better understand your customer



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# Summary

- ✓ Complementary channel to market
- ✓ Protect your brand
- ✓ Pricing Transparency
- ✓ Consistent customer experience



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