

Digital Innovation in Retail: Retailers vs OTT Players

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Abstracts

This report presents how the retail sector is impacted by technologies and what the consequences are for traditional players. The first part of the report provides an overview of the major issues and opportunities for retailers around technologies. The second part presents the technologies seen as key to respond to changes in customer purchase behaviour. The third and final part outlines the strategy of major bricks-and-mortar players in response to the introduction of online marketplaces.

The retail industry is characterised by the rapidly-growing large volumes due to the globalisation of product shipments worldwide. This boost of global sales comes with the emergence of online commerce. In 2013, the global retail market represented 22 trillion USD, up from 6.4% in 2012, according to eMarketer. The market will keep growing in the years to come, reaching 28 trillion USD in 2018. The growth in the retail market is basically driven by e-commerce sales. Despite the advent of e-commerce, nevertheless, in-store purchases still remain the major part of the market, weighing in with 95% in 2013. This figure is expected to decrease in the years ahead. Indeed, the share of e-commerce sales in the retail market is expected to grow to 2.5 trillion USD, i.e. 8.8% of global retail sales by 2018.

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LIST OF PLAYERS REVIEWED

Among the businesses reviewed in detail in this report, including their subsidiaries, are:

Alibaba

Amazon

Carrefour

Google

Macy's

Rakuten

Target

Tesco

Walgreen

Walmart

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