



DOUWE EGBERTS
PROFESSIONAL

WAKE UP TO DIGITAL COFFEE!

The digital opportunity for
Douwe Egberts Professional
December 2013

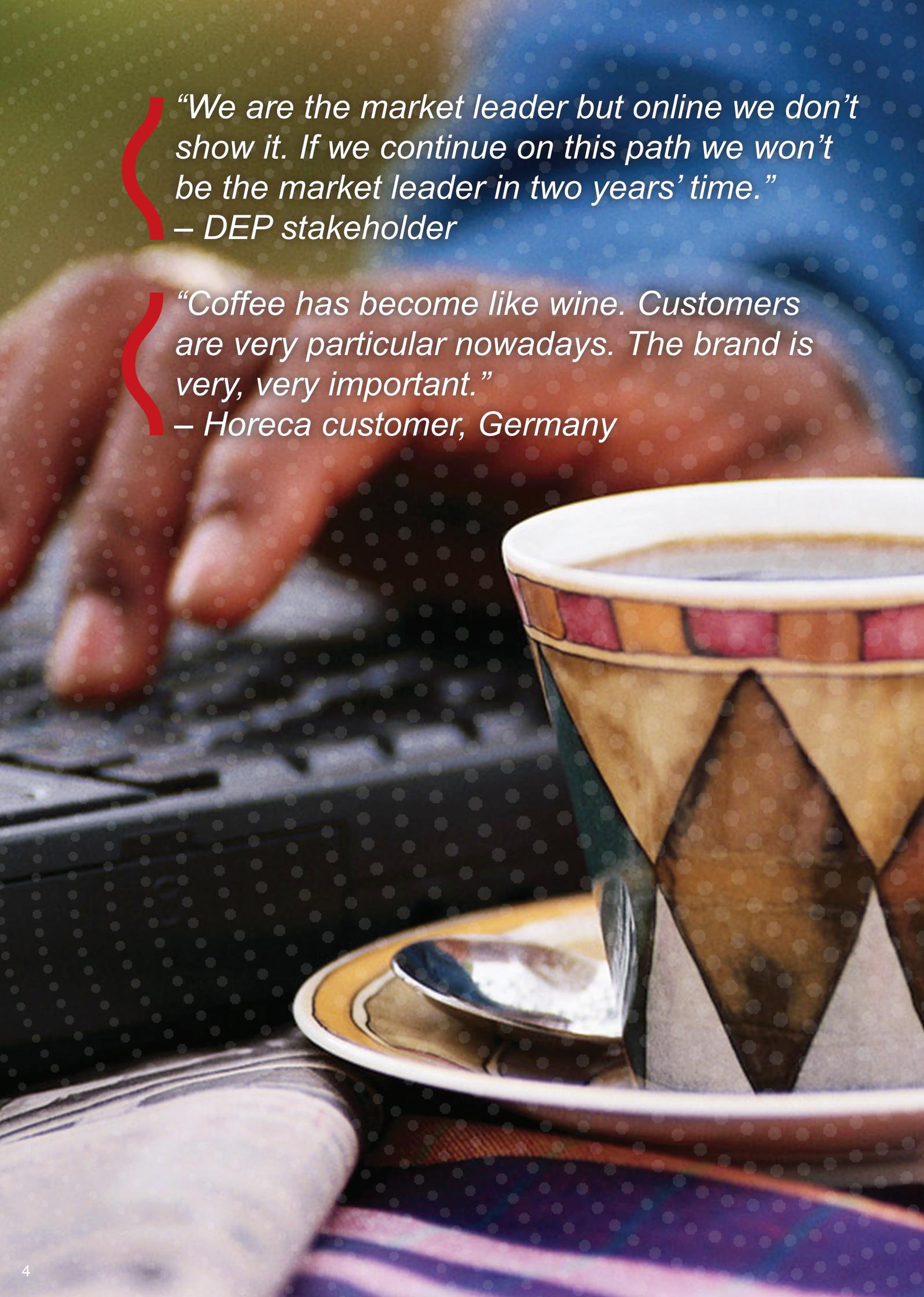




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“We are the market leader but online we don’t show it. If we continue on this path we won’t be the market leader in two years’ time.”

– DEP stakeholder

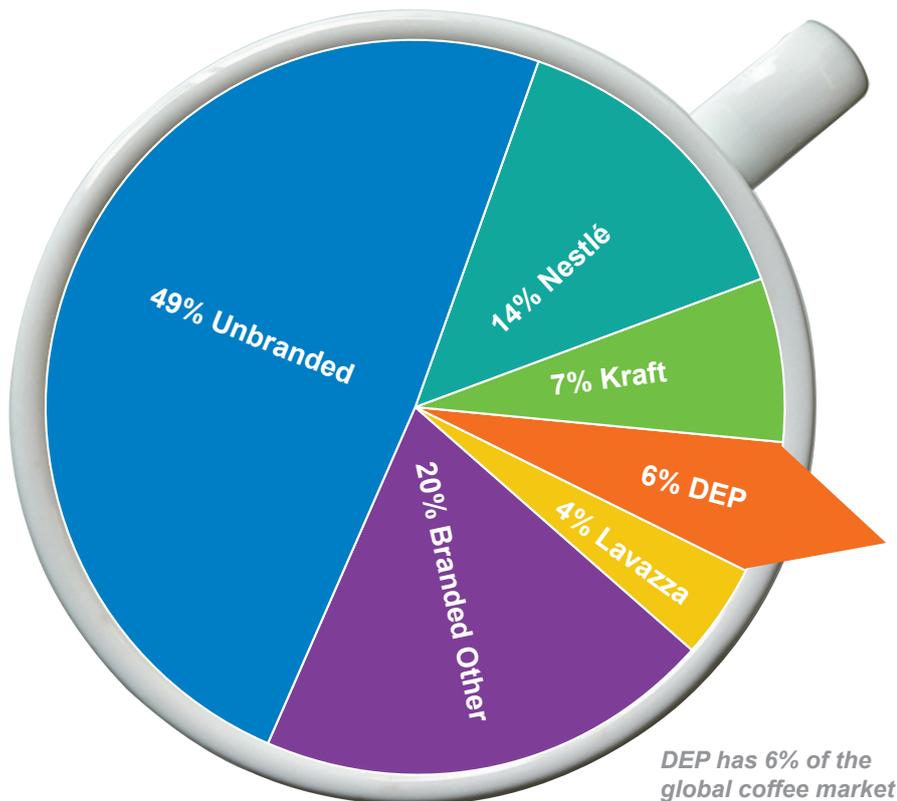
“Coffee has become like wine. Customers are very particular nowadays. The brand is very, very important.”

– Horeca customer, Germany

EXECUTIVE SUMMARY

This report is the result of collaborative research between DEP and The Retail Practice on the DEP digital opportunity. The findings come from global conversations with stakeholders and customers and in-depth analysis of competitors and online market leaders.

Executive Summary: Where We Are Today



51% of the world's coffee market consists of brands, whilst 49% is unbranded. DEP ranks 3rd in market leadership. There is a huge opportunity to use the DEP website and other digital media more strategically to increase customer retention and conversion.

1. B2B is changing

As the B2B landscape changes, digital is increasingly being used by both new and existing customers to make decisions.

2. Competitors are doing better in content

All DEP sites need a content upgrade. Illy, Starbucks and Nestlé (Nescafé and Nespresso brands) offer greater product information, product training and industry knowledge and maintain a community with their customers.

3. Competitors offer online ordering in more markets

Illy have webshops in 9 markets, Nescafé in 55, Nespresso in 116 and DEP in 2.

4. DEP is inconsistent across different websites

The Netherlands is most advanced in terms of its webshop and online webchat function, with Denmark next. In most markets there is very limited usage by existing customers. The Australian website is severely underperforming, The German and Belgian websites, though new, should be improved.

5. We can learn from B2B leaders

Coca-Cola help their customers achieve more in business by offering a wide variety of knowledge and training online. Their webshops lead to better sales targeting and ease of use. Amazon use customer data for personalisation, which is considered to be one of the main ingredients of their success.

Methodology

We've spoken in-depth:

- over 6 weeks
- with 70 of our customers
- with 6 DEP stakeholders (in marketing roles)
- across the 5 expansion markets: Australia and NZ (Aus), Belgium (BE), Denmark (DK), The Netherlands (NL) and Germany (DE)

Customer Interviews

Shown in a series of bar graphs

Customers have told us what they want through one-to-one interviews carried out on the telephone. They were interviewed for between 30 minutes and 1 hour.

They were always carried out in the local language. A copy of the questions we asked follows in Appendix 6.

We show customer responses in 3 ways: all 5 markets together, broken down per market and by the following sectors - small, medium or large businesses, health and care and horeca (hotels, restaurants and cafés).

Each individual customer response is also available. If you would like to read them, please contact us.

DEP Online Rankings

Shown through a series of tables with red, amber and green cells

We've analysed what the DEP websites offer across the different markets.

We've compared DEP's website to its global and local competitors and to B2B market leaders.

According to a set of specific criteria, each website was ranked manually and refers to B2B sites only.

The market data was collected through a combination of desk research and interviews.

Key Findings

1. B2B marketing is changing: it is merging with B2C.

The DEP B2B customer is strongly influenced by the DE B2C brand. We are seeing that B2B and B2C marketing are hard to distinguish between across all industries today.

“We’re not just talking to the buyers - our campaigns will focus on talking to the coffee drinkers, since buyers are focused on the price and it’s the drinkers who always complain about the coffee.”

– DEP stakeholders (BE, DK, Aus)

For brands such as Illy, Starbucks, Lavazza and Kraft there is just one website for both types of customers. The two marketing functions across DEP should develop a cohesive digital strategy.

2. 73% of customers we spoke to were happy with DEP overall.

Customers stated product quality (61%), delivery reliability (30%), price (30%) and brand (24%) as their reasons for choosing DEP. They have a very high touch relationship with sales representatives. Migration to e-business will help sales teams and reduce costs.

3. Digital can help us to meet our customer needs.

Digital can help us to provide more product information, on-going support, knowledge and training to our customers, communicate more effectively, and monitor and improve their ordering process. 68% of customers asked would like to use the website more for communication, 35% would like product information and 33% would like promotions to be available online.

3.22
versus
2.79

More product lines are purchased in online sales than on telephone in DK

58%

of all sales come from online in NL



“Currently there’s no experience online - the website is too clean and business-like. It needs to breathe passion for coffee and how we can help customers with our expertise.”

– DEP stakeholder (BE)

64%

of customers we spoke to prefer to shop online

70%

of those who want to shop online do not have the facility

100%

of customers we spoke to in The Netherlands and Denmark always shop online

4. DEP's individual country websites vary greatly despite a shared global template.

- From webshops in The Netherlands and Denmark to none in Australia, Belgium and Germany.
- From high product information in Denmark, to medium in The Netherlands, Belgium and Australia to low in Germany.

5. In The Netherlands and Denmark our websites rank highly compared to their competitors but in Australia, Belgium and Germany they are underperforming.

The Dutch webshop is proving best practice amongst the DEP websites. The Danish webshop needs an upgrade but the website has rich product information and an online chat function. Australia, Belgium and Germany need to improve their websites, by offering not just a webshop but also other content and functionality, as they are under threat from competitors. Australia is most at risk as the competition is digitally advanced.

6. 64% of customers prefer to order online. Out of that figure 70% do not have the facility.

Most of our customers do not have the option to order online, although they would like to. We see that our business customers are more likely to order online. The main reasons customers give are convenience, speed, efficiency and cost saving. We see that our horeca and health and care customers are less likely to use online ordering. The main reasons they give are that they are happy with the way things are and believe it would be inconvenient, slower and less efficient.

7. 100% of customers we spoke to in The Netherlands and Denmark told us they always shop online, claiming it is easy, efficient and quick.

"The transition from telephone to online ordering was easy and smooth; online ordering is preferred because it's quicker, whereas on the phone there's a waiting time before you get helped."

– Large business customer, The Netherlands.

"Online ordering is very convenient, very easy and I decide myself when to order, so I can do it whenever I have the time."

– Horeca customer, Denmark.

The webshops account for 58% of the total TeleSales Ingredients (TSI) in The Netherlands and 16.8% in Denmark (November 2013). Online orders have been growing steadily, replacing TeleSales, which can be a potential cost saving. We also see that on average, in Denmark, customers spend on wider product lines when ordering online¹.

8. Competitors Nestlé and Illy have a more advanced digital offering than DEP. Our digital offer is lacking in emotional engagement.

These competitor brands currently offer more than DEP, such as better support of their business customers with online knowledge and training as well as product information that informs the customers and builds up the brand story.

Price is such an important factor in B2B decision-making, according to DEP stakeholders, so the brand and its additional perceived value have become increasingly important in the choice of supplier.

¹ In Denmark there were 3.22 product lines per online order versus 2.79 on TeleSales.



“We are seeing that the story behind the coffee our customers buy is so important. If DEP could have more of that on their website that would help us pass this on to our customers, which would help sales.”

– Horeca customer, Australia

What Next?

In some markets we are under threat from our competitors and must improve.

None of the DEP websites currently are an example of best B2B online practice. We can innovate by making small incremental changes over time, reacting to the changing digital landscape. Ongoing changes will avoid us incurring large costs later on and will prevent irredeemable market losses.

All DEP websites should have a webshop.

64% of our customers want to order online but 70% of these cannot as we do not have webshops in their markets. A usability comparison of online and telesales ordering would confirm which is more efficient and form the basis for improvements of both methods. The webshop is a feature that most competitor websites in expansion markets have as standard. We believe it is important for business customers in particular. Online ordering also paves the way for further functionality.

Greater emotional engagement and content is what DEP stakeholders and their customers want.

We need to increase our support of B2B customers in as many digital touch points as we can. All DEP websites should move to having an online chat function to improve communication. We should also provide deeper knowledge around our products and the industry. By enhancing online community aspects we will allow customers to share their experiences with each other and promote both themselves and us.

The Dutch and Danish webshops have already proved the case.

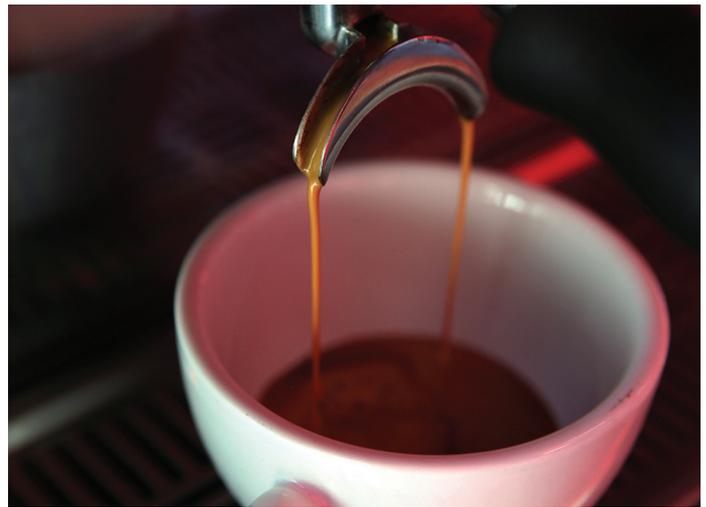
Improved websites can develop DEP's competitive offer in each market by increasing new leads, customer retention and average customer spend. We have seen that, for example, the Danish webshop sells more product lines than its TeleSales department. In The Netherlands there has been a 30% increase in customer AOV after online migration. Where webshops exist we have seen a decrease in more costly TeleSales ordering. In 2013 in The Netherlands there were 30% fewer TSI orders (5,000) compared to 2011.

Using customer data will improve the personalised experience.

Over time our websites can build on customer analytics, personalisation and integrated payment systems, thus enhancing the customer experience and our own efficiency. Loyalty discounts for instance will be better tracked and offered fairly to all, formalising the sales representatives' powerful work to date (more: p.20).

The next step is to develop a DEP digital strategy with set goals that forms part of our overall strategy.

The digital strategy will maximise the use of digital channels in order to drive overall sales strategy. It will increase digital engagement with both new and existing customers and connect with DE's B2C digital offering to deliver an integrated online presence. It should pilot in expansion markets and then roll out to wider markets.



THE POWER OF ONLINE



*“There’s a big need for B2B ordering online
and integration into other ordering platforms.”
– DEP stakeholder, Australia*

The Uses Of The Website

“(On the DEP website) The focus has been on function and efficiency rather than branding and emotional engagement.”
– DEP stakeholders (NL, BE, DK)

The DEP website targets two distinct types of customers:

1. For New Customers - Using The Website For Lead Generation

“Currently we do a lot of cold calling through a call centre to give sales reps leads - this is hard!”
– DEP stakeholder (DE)

According to a DemandGenReport*, in the US 78% of B2B buyers start their research with an online search and a visit to the vendor’s website. B2B buyers also engage in online communities and, according to the survey, more than half (54%) have followed group discussions to learn about a topic of interest, followed by connecting with leaders (24%) and posting questions via social channels (22%).

According to the CEB Marketing Leadership Council Whitepaper, potential business customers globally are increasingly using digital channels to form opinions about major purchases. Non-supplier sources guide their purchase decisions. They are delaying serious engagement with sales teams and doing due diligence on their own needs, as seen in the figures below.

2. For Returning Customers - To Enhance Customer Satisfaction And Retention

“It costs about 5 times more to acquire a new customer than it does to generate new business from an existing customer.”
– Source: Loyalty 360 Whitepaper

“We have a really hard time making sales as the focus is on price - 2.80 euros/kg and DEP’s cheapest is 9 euros/kg.” – DEP stakeholder (BE)

Digital allows us to really support and nurture our existing customers, making sure they succeed in business. We can add value, both in terms of convenience and efficiency, and the added benefit of customer analytics

can provide personalised information based on previous interactions. Our existing customers can have access to more information, both from us and other customers, which will allow them to make more informed product decisions especially about coffee and machines. They can increase their knowledge to train their baristas better as well as themselves in marketing or business functions.

Our research shows that digital can often improve communication. Ordering online can save on errors that happen over the phone and can be done at customers’ convenience rather than during office hours.

“As a trend B2B customers are becoming more used to self-service.”

– Source: CVL consultancy “B2B Online under the Spotlight” report 2008

3. For Sales

The Danish DEP webshop sells more product lines online than over the telephone. In The Netherlands the share of cross-sell (non-coffee products) is higher for online sales (31%) than for TeleSales (29%) and route sales (24%).

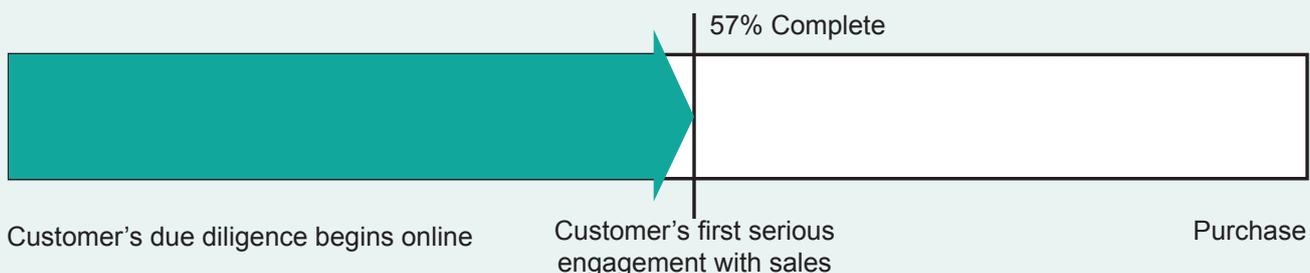
“This is probably because often when customers are online browsing through products they are in the mood to buy and explore new things. Often on the telephone they are just quickly doing a repeat order and less likely to be open to new product lines.”
– DEP stakeholder (DK)

Our Findings

Our research has found that DEP is under-utilising the power of online in not providing enough rich content and webshops. Content would provide strong emotional engagement with the brand. Webshops would provide convenience and increased sales. Customers say they want both.

* <http://www.demandgenreport.com/industry-resources>

Customers’ Progress in Purchase Decision-Making Before Engaging in Sales



Source: CEB Marketing Leadership Council 2012: Customer purchase decision-making survey.

We asked:

What would you like to see on the DEP website?

Everybody said

Promotions and discounts
Webchat would be helpful and fast
Coffee and tea expertise
An online forum

Most people said

Online ordering
Service engineer appointment booking
More technical detail
Service videos
A reminder by e-mail to reorder

Some people said

Product recommendations
A reminder through an app to reorder
Easier communication methods to get more information
Detailed FAQs
More product information showing the blends and explaining their ingredients
More information on trends and insight
An ordering app which links to my internal system
A news section
Integrated operations and billing



We asked:

Why do you choose DEP?

Customers responded:

We are very happy with Douwe Egberts, in every sense of the word. And when we are happy with a supplier, we value quality over price. Loyalty is a very important factor

Ordered products are always delivered on time

We are very happy with both the way it works in terms of delivery and the quality of the coffee

Reliable quality and good value for money are key terms

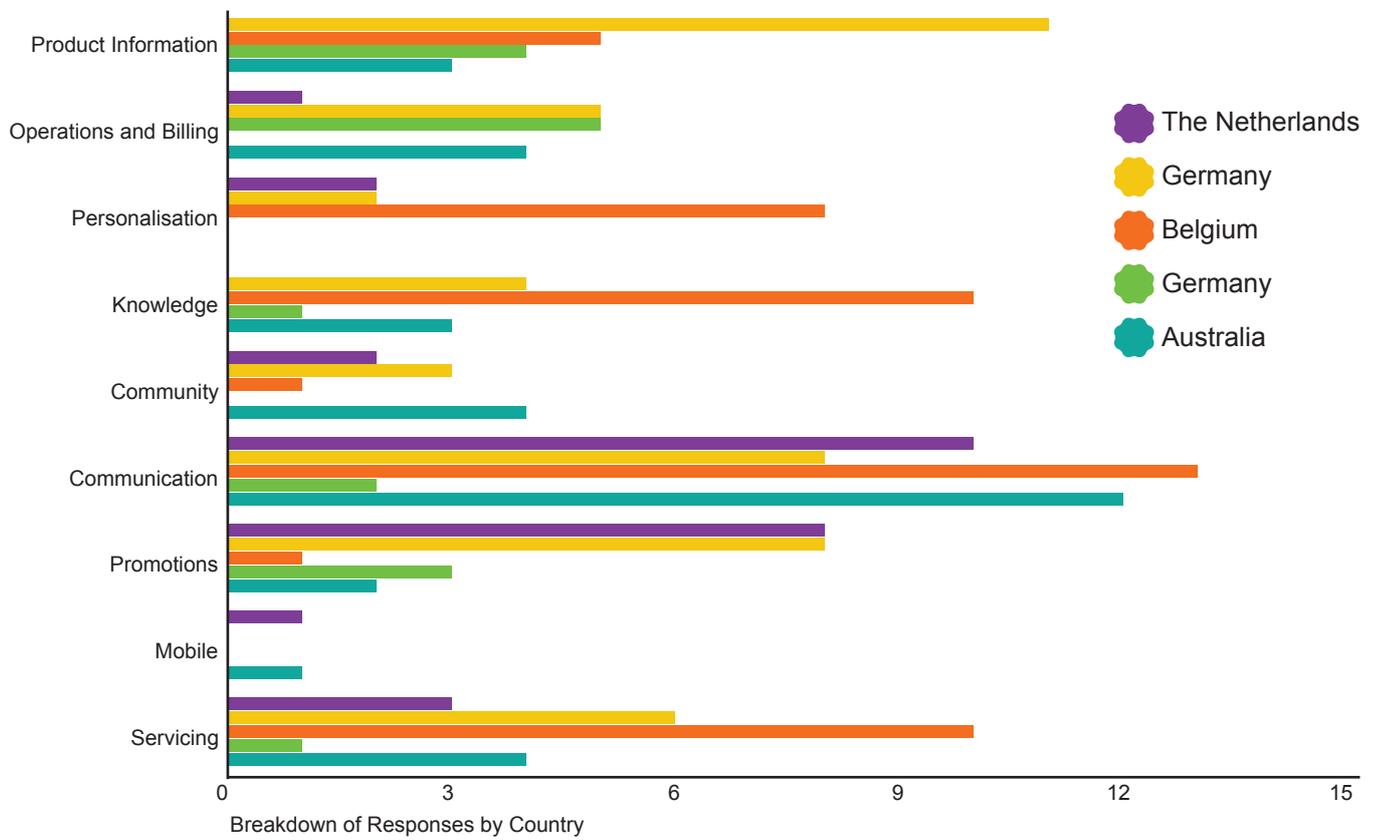
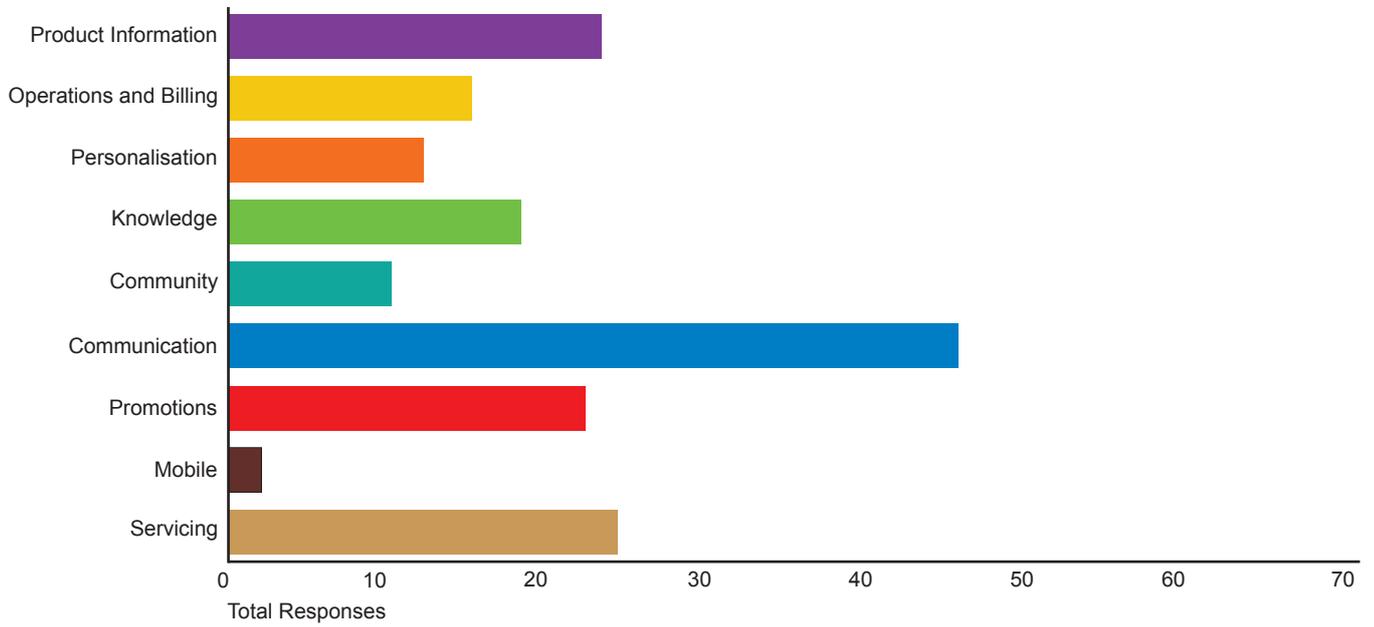
Speed in preparing the Cafitesse products

There are other suppliers who sell similar products to Douwe Egberts such as coffee, but do not have the range... I think that Douwe Egberts is top of the market for that sort of thing. People generally want the Douwe Egberts brand, they like it



The data that follows is based on 70 one-to-one customer interviews.

a. Customer Responses: What Would You Like to See On The DEP Website?



Why Customers Choose DEP



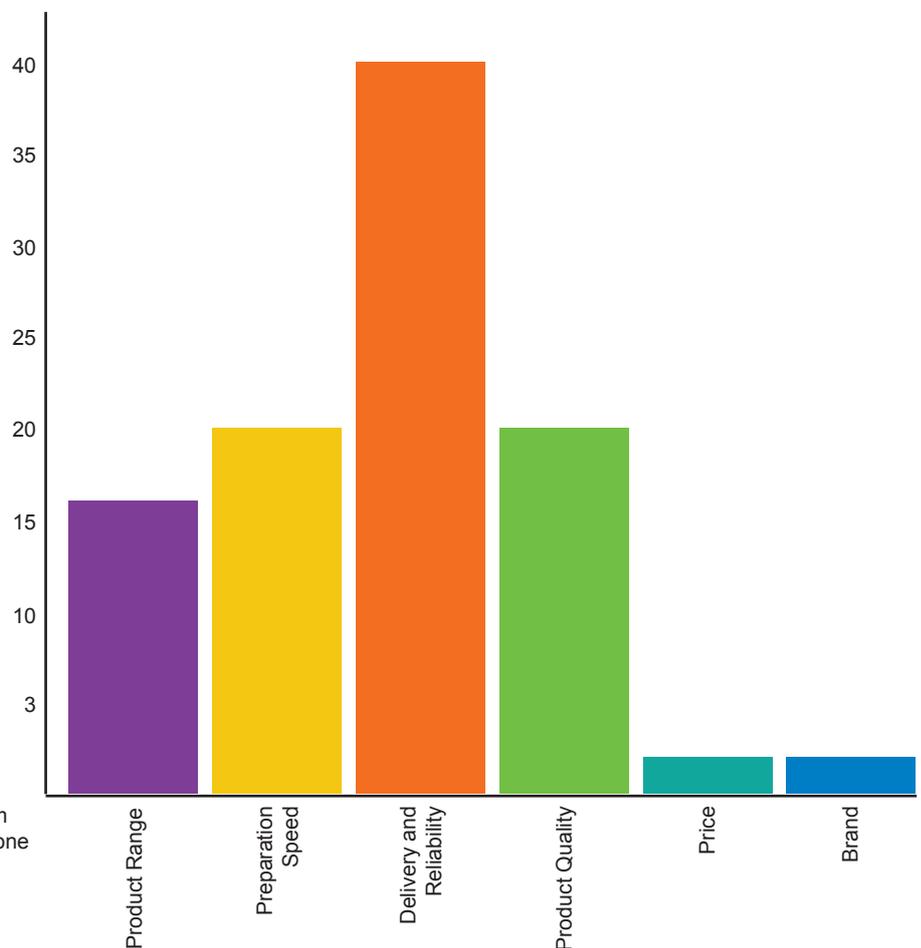
b. Customer Responses: When Do You Need Face-to-face?

The most frequent customer responses:

- When we need deeper information on products
- To estimate the volume of coffee we need (each case is different)
- Changes and expansions
- Purchasing a new machine
- What products to order because DEP know my business and demographic

(For a full list of responses see Appendix 8)

c. Customer Responses: Why Do You Choose DEP?



This data comes from 70 customer one-to-one interviews.

How We Can Improve Our Digital Presence

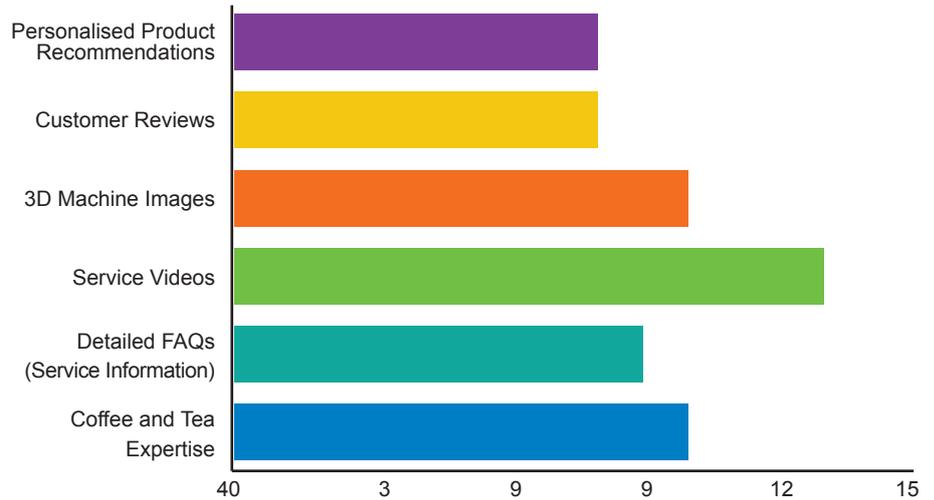
a. Product Information

Deeper product information is very important for lead generation, conversion and retention.

We found that 33% of customers would like deeper product information on the website. They would like to use the web and media tools to give a fuller picture of our products and services - videos, 3D images, customer reviews, data showing best-selling products, and coffee and tea expertise.

Digital allows companies to offer a deeper understanding of the products and services they offer, as more knowledge can be absorbed more easily than on the telephone. Customers are able to read and view videos in more depth and at their own pace on the website.

Using data to show what are our best-selling products are is also something that we found customers wanted. Many Australian customers told us they wanted more about the “story” of DEP coffee, such as where the coffee comes from, what type of farms and so on. This affects their customers’ purchasing decisions.



Nespresso website



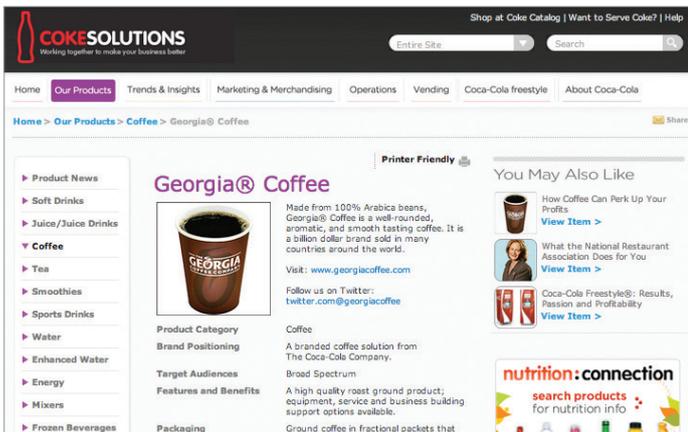
Nespresso website



Merrild website



Merrild website



Coke Solutions – Coca-Cola’s B2B site



DEP site for The Netherlands

“I’d really like to know more about the Douwe Egberts coffee story so I can pass this onto my customers. It’s really important to them as the brand isn’t really known here.”

– Horeca customer, Australia

b. Webshop

All customers we spoke to in Denmark and The Netherlands said they prefer to order online (they have the option of both online and TeleSales). In the other markets customers currently only have the option of ordering through TeleSales. In Belgium and Germany there is a slight preference towards online ordering in future, whereas in Australia they prefer to stick to TeleSales.

Customers in horeca and health and care are equally divided as to whether they'd like to order online or not. Business customers would prefer to order online.

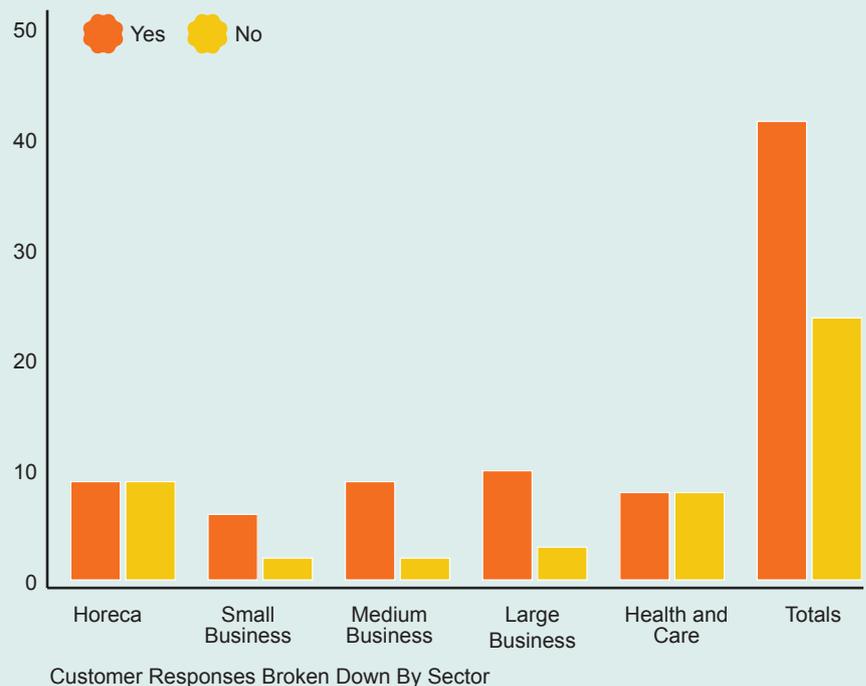
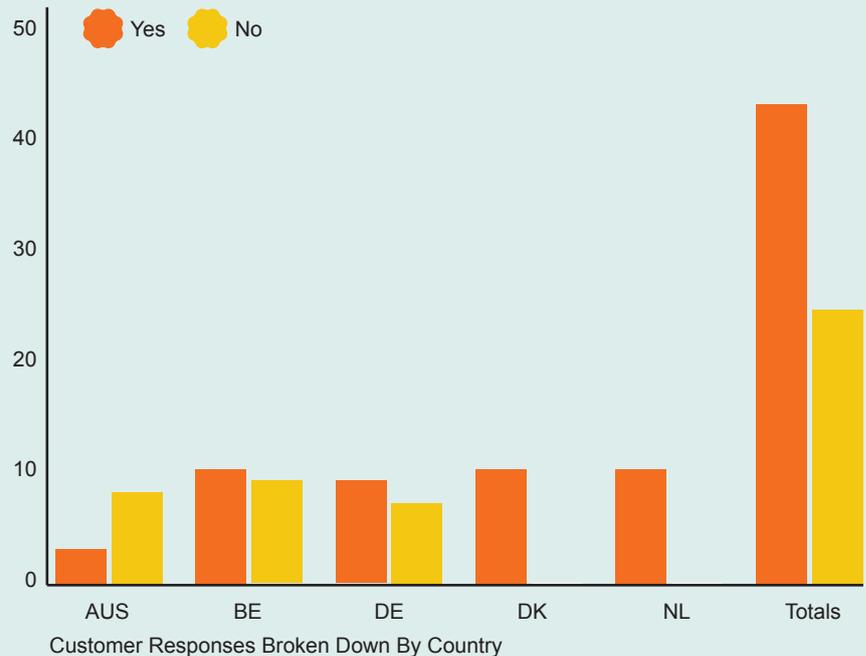
Having a webshop has become more and more important and customers tend to use online ordering for other services at work (see a full list of responses in Appendix 7). Our customers want to be able to order at any time that suits them. Some also say that it removes room for error, which a telephone can do in a noisy environment at their restaurant or café.

Webshops such as the one in The Netherlands are a very good start. However, the only other webshop DEP currently has is on the Danish website. It came first and its interface is not as user-friendly as The Netherlands' website, which might explain its difference in the online ordering percentage of TSI totals. The other countries do not have webshops and this is a huge gap (for more detailed analysis of the webshops please visit page 26).



Do you prefer to order online? Why – or why not?

Do you prefer to order online?



Would you prefer to order online?

Key responses from customers who do order online

“It’s an easy way to reorder the same products.”

– Most customers in The Netherlands and Denmark

“It’s easy and quick and I use the favourite list a lot.”

– Medium business customer, Denmark

“It is efficient, much better than doing it over the phone. You are provided with an overview of your order straight away.”

– Large business customer, The Netherlands

Customer responses from those who would like to but currently can't

“Online is a possible option (or an app). If it was a standard order then we could change it to whatever we want it to - depending on whether we have a busy week or a quiet week. We’ve got computers and everybody has a smartphone so it could work.”

“I generally order a lot online, so it might be interesting... it would be easier to order every time without needing to wait for a phone call on a certain day.”

“It’s always useful to be able to buy online, as you can order in the evenings or weekends.”

“It would fit in with our ordering procedure for all products (this internal online reordering template/webshop). It might be interesting to connect it with our internal webshop system.”

Customer responses from those who wouldn't want to

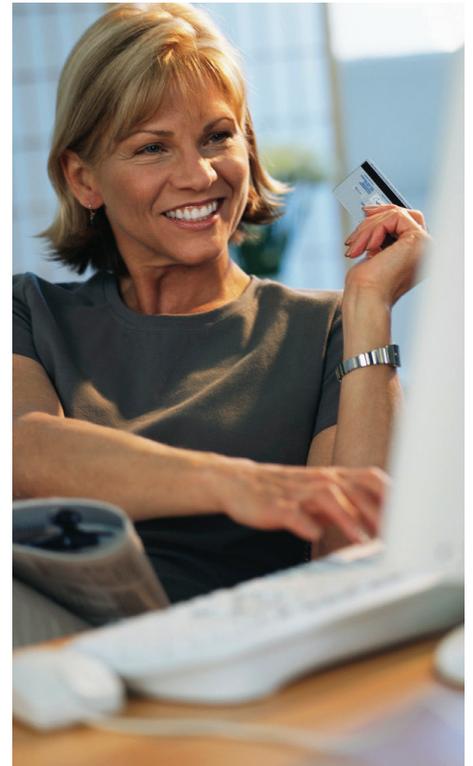
“Phoning is fine for us because we do not have laptops or tablets in the store.”

“This is double workload... I normally get about 30 items on each order and I’ve got to do that for about 8 different warehouses so it’s too much work doing it over and over again.”

“I don’t spend much time in front of the computer.”

“We don’t have a computer in the café, but we do all have smartphones.”

“We cannot integrate their interfaces with the current SAP system (especially developed for hospitals) that we use; it would be too expensive to adapt the system to comply with other platforms.”



Webshops can be enhanced to offer more than just ordering. They can remember the customers' last orders and add frequently purchased products to their favourites. In addition, they can integrate with the customer's account so they are always up to date with what they are spending; and with their internal payment and ordering systems, which saves customers time. Not all customers want to or are able to go onto an external website to order. These are often blocked in large companies and can mean a doubling of a customer's workload, as they then have to put the order in again on their own internal system.

Coca-Cola has an integrated EDI system, which allows their business customers to integrate purchasing and billing systems, making it more convenient for them (read more on Coca-Cola on page 31).

c. Personalisation

94% of businesses stated that personalisation 'is critical to current and future success.'

Two-thirds (66%) of respondents* said that personalising the website improved business performance and customer experience.

– Econsultancy and Monetate survey, *The Realities of Online Personalisation, 2013*

*Based on a survey of more than 1,100 digital and ecommerce professionals working for brands and agencies.

Personalisation is a marketing trend that is based on customer analytics and data. It is one of the most powerful applications of digital technologies. Each customer can receive different information when they go online based on real-time behavioural data. In the same way, Google serves its users' different search results based on individual search history and e-mail keyword tracking (if they use Gmail), and so too can DEP's website. It could start by detecting which country the customer is based in and redirecting to that country's website. It could also offer options that are customised to the customer's business sector, allowing them to choose and then remember that option. The website can also offer promotions based on customers' spend and tastes.

Personalisation could be used in enhanced webshops to recommend products based on customers' order history; Amazon, for example, has a section on its website that says "If you liked this product you will also like this...". In addition to customer reviews and more information in the webshop, this can help customers to feel like they are making better-informed decisions. They will often spend more (as Amazon has found in relation to items that are "Frequently bought together" or "Other items customers also bought") and if DEP expands its product range this will be even more relevant.

Amazon have said that "Our mission is to delight our customers by allowing them to serendipitously discover great products. We believe this happens every single day and that's our biggest metric of success." Another cross-sell tool is to actively recommend add-on products during checkout when an order crosses a pricing threshold, in the same way that traditional shops have products by the cash register (Source: <http://tech.fortune.cnn.com/2012/07/30/amazon-5/>).



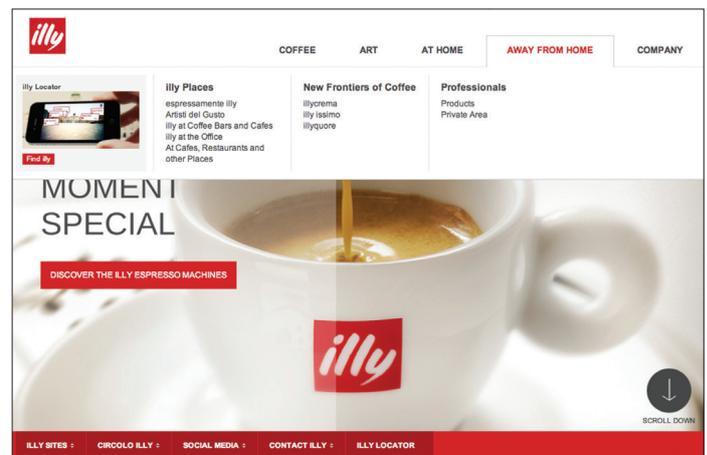
"If you want to know anything about coffee you should go to DEP's website - that's what it should be."

– DEP stakeholders

d. Knowledge

Digital also offers very good support and can help our customers to succeed in business - through product training, trends and insights, and marketing and accounting support. In the case of cafés that are often run by small-scale entrepreneurs, this can be invaluable. We found that 27% of the customers we asked would like to have increased knowledge.

Online product training is something we heard a lot about from customers; they have told us that they would welcome it. Although sales reps do a great job, they have to train a group of people in order to make their visits worthwhile. The website can be used for on-going training in, for instance, how to make the best latte or how to clean the machines. Videos can be watched on a one-to-one basis and repeated whenever a new member joins or takes a refresher course.



Some companies like Coca-Cola provide their customers with a high level of knowledge and inspirational content. They know that supporting their customers to sell more will as a result help them sell more too. Another brand that does this is Illy, which offers expert knowledge on its website. Both Coca-Cola and Illy provide many tools in order to do this. For example, Illy has a University of Coffee, which offers expert knowledge (more on this on page 31).

e. Community

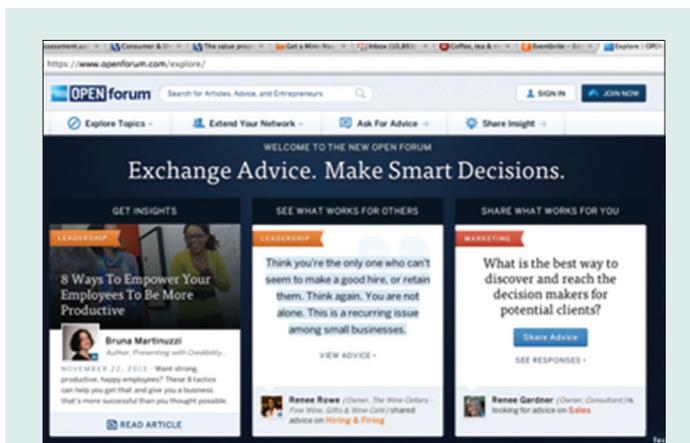
We found that 33% of our customers would like more online community aspects.

According to a 2012 Harvard Business Review study, consumer engagement with a brand rises with the ease of their purchase-decision journey. This journey is measured by how easy it is for customers to gather and understand

(or navigate) information about the brand, how much they can trust the information they find, and how readily they can weigh or compare their options (Source: *To Keep Your Customers, Keep It Simple - Patrick Spenner and Karen Freeman, Harvard Business Review, May 1st 2012*).

Community is important for new leads as it can move our website toward a more customer interactive or Web 2.0 approach, where content is not only top-down from DEP to its customers but also allows our loyal customers to be brand ambassadors for us. Our customers can often sell our product better than we can, as their opinions are trusted as being more objective and authentic. We found that DEP in general is loved by its customers, who tend to have long-term relationships with the brand, with 73% stating that they were happy.

We can increase product take-up and customer retention by having places online where we can support our B2B customers and where they can support each other and increase their knowledge.



American Express's Open Forum

A community for entrepreneurs set up in 2007 for the company to get closer to small and medium-sized enterprises.

- Openforum.com receives over 2 million monthly visits according to SimilarWeb
- Open's Small Business YouTube channel has over 10 million views
- @OPENForum has nearly 200,000 followers on Twitter

Another area that was mentioned was the need for our customers to be promoted on the DEP website.

f. Communication

The web can enhance a company's communication strategy and the Danish and Dutch websites use this brilliantly through their online webchat function.

For lead generation, as well as for returning customers,

"I'd love a place on the website where you can see where to find Douwe Egberts coffee in your country or city. That would promote my business too. Perhaps every week it could feature a café or specific barista? It would help my employee motivation heaps!"

– Horeca customer, New Zealand

39%

of customers in Germany, Australia and Belgium said they want chat functionality on the website

33%

of customers want more community aspects on the website

communication is key. For lead generation this can be a way to speak to us during their research phase, rather than sending an impersonal e-mail or filling out a form.

"A webchat would probably work because sometimes when you call you're on hold for half an hour."

– Large business customer, Germany

Returning customers we spoke to who use the telephone mainly to interact with DEP saw online webchat as a function they would welcome if they had it, since it allows a speedy response from a real person.

In addition, 27% of customers said they would like to be reminded by e-mail to reorder and 18% would like to book machine services online.



“There’s one international template but each website is doing what they want with it.”

– DEP stakeholder (BE)

Comparison of DEP websites

In terms of product information, the Dutch, Australian, Belgian and Danish websites include product descriptions, specifications, photos and FAQs. However, the Danish website has the richest product information since it includes user guides, videos and downloadable PDFs for certain products. It also includes an online brochure about coffee, which consists



of handling instructions for some of its products. In contrast, the German website explains product information in bullet points, which is much more basic. However, the German website is the only one that offers general information about coffee (growing, processing, quality testing, preparation methods and more).

Personalisation on the Dutch website includes online tailored advice and their webshop allows customers to view their purchase history and manage their purchases online.

They are then invoiced and do not make payments online. Although the Danish website does not include tailored advice, it has webshop personalisation including product recommendations and purchase history. The German, Belgian and Australian websites target specific segments. However, personalisation is higher for the German website since it includes tailored advice.

None of the websites have a section where B2B customers have a voice, however the Danish website gets closest to this with its presence on social media platforms like Google+ and YouTube. It also gives customers the option to find their closest distributors. The Australian website also allows for this and the Dutch and German websites have news pages with up-to-date information.

In terms of communication, all of the websites rank highly since they offer various ways for their customers to contact them. This includes online contact forms and various fax numbers, phone numbers, e-mail addresses and mail addresses. The Netherlands and Denmark have higher rankings since they also have an online webchat function.

The 5 expansion market DEP country websites compared to each other

Market	Product information	Webshop	Personalisation	Knowledge	Community	Communication
The Netherlands	Yellow	✓ Quality: medium	Yellow	Red	Yellow	Green
Germany	Red	✗	Yellow	Green	Yellow	Yellow
Denmark	Green	✓ Quality: low	Yellow	Red	Green	Green
Belgium	Yellow	✗	Red	Red	Red	Yellow
Australia and New Zealand	Yellow	✗	Red	Red	Yellow	Yellow

Denmark ranks the highest overall, although the quality of its webshop should be improved. Belgium is underperforming compared to the others as is Australia. Germany could improve, as it has minimal information for each category.

How to read these tables

Product Information

How much content is there on products and services - e.g. videos, 3D images, customer reviews and data showing best-selling products.

Webshop

How many markets the webshops are in, if any.

Personalisation

How customised or segmented the customer journey is based on past data and type of customer - e.g. providing targeted promotional offers based on loyalty and specific contact methods for new customers broken down by sector.

Knowledge

How much customers know and are inspired - e.g. product training, trends and insights, business support.

Community

How much customers can speak and share knowledge, be listened to and promoted - e.g. forums, social networks, store locators.

Communication

How customers can get in touch for information and servicing - e.g. e-mail, telephone, webform, online chat.

Search

How high the brand appears in Google search results, localised if appropriate.



Low ranking

The website is underperforming compared to the others.



Medium ranking

The website is performing equally well as the others.



High ranking

The website is performing better than the others.

Social Media

On how many social media channels does it have a presence - Google+, YouTube, Facebook, Twitter, LinkedIn.

News/Press/Blog

How much fresh and changing content there is.

E-mail Contact

How easy it is to contact the right person by e-mail.

Content Rich

To what extent can the customer emotionally engage with the website - product information and knowledge.

Functionality

How many things are on offer on the website(s).

Customer Service

How easy it is to communicate with the company in terms of service and support.

Mobile App

How many apps the company has, if any.



DEP IN THE B2B ONLINE MARKETPLACE

*“The DEP website needs more branding
and emotional engagement.”*

– DEP stakeholders (NL, BE, DK)



How Digital Is The Coffee Industry?

a. Website Structures

We have a B2B portal website which allows the user to select individual country websites and webshops if they exist. Only two of the DEP markets currently have webshops of differing quality levels.

Most of our global B2B competitors also prefer to have a portal with individual country websites. In the case of Nescafé, Starbucks and Lavazza, their websites and webshops are separate. They do not have their webshops incorporated into their websites; instead, customers are referred to another website in order to access them, where again they have to choose their country.

The main exceptions to this are Illy and Kraft, which have one global website for all markets. They do not have country-specific websites. This has advantages for large customers who cross markets; it also lowers costs and creates a cohesive brand experience across countries. Of course, the website can still exist in different languages. However, Illy has country-specific webshops while Kraft has only one webshop.

This solution is unlikely to work for us due to the localised nature of our business in different markets.

The 5 expansion market DEP country websites compared to each other.

Brand	Individual country websites	Individual country webshop
DEP	✓	Webshop available in 2 countries (Denmark, The Netherlands)
Nespresso	✓	Webshop available in 116 countries
Nescafé	✓	Webshop available in 55 countries
Starbucks	✓	Webshop available in 5 countries (US, UK, Germany, France, Canada)
Lavazza	✓	Webshop available in 22 countries
Illy	✗ one global website	Webshop available in 9 countries
Kraft	✗ one global website	Webshop available in 1 country (Australia)

For a full list of comparisons with all our local competitors see Appendix 4



b. How Do We Compare To Our Top Competitors?

In this section each competitor website has been compared to the average DEP website. Each of the 5 country websites was ranked and an average taken for each item (see Appendix 3 on page 48). The results are from DEP's point of view, so for example in the table below

DEP is exceeding Nescafé in functionality and customer service so it is ranked green. DEP is doing as well as Nescafé in search, news and e-mail and so is ranked amber. DEP is doing worse than Nescafé across social platforms, content and webshop and so is ranked red.

How do we rank against our top competitors?

 DEP has a lower ranking than this brand

 DEP has an equal ranking to this brand

 DEP has a higher ranking than this brand

Competitor	Search	Social platforms	News/press/blog	E-mail/contact	Web				Mobile/app
					Content rich	Functionality	Webshop	Customer service	
Nespresso	Yellow	Red	Red	Yellow	Red	Yellow	Red	Yellow	Red
Nescafé	Yellow	Red	Yellow	Yellow	Red	Green	Red	Green	Red
Kraft	Yellow	Yellow	Yellow	Yellow	Yellow	Green	Green	Green	Yellow
Illy	Red	Red	Yellow	Yellow	Red	Red	Yellow	Yellow	Red
Lavazza	Yellow	Yellow	Green	Yellow	Red	Green	Yellow	Red	Red
Starbucks	Red	Red	Yellow	Yellow	Yellow	Yellow	Red	Green	Red

Biggest threats: Illy, Starbucks, Nestlé – Nespresso, Nescafé

Illy

Illy's website is an example of good practice. They have what every B2B website needs: a high level of content including a great deal of coffee knowledge, a presence across 3 social media websites, a mobile app, good functionality, an online community page, a café locator, and a webshop where customers can purchase goods, from sugar to expensive machines. It is very easy to find everything from the homepage. As such, we have found that:

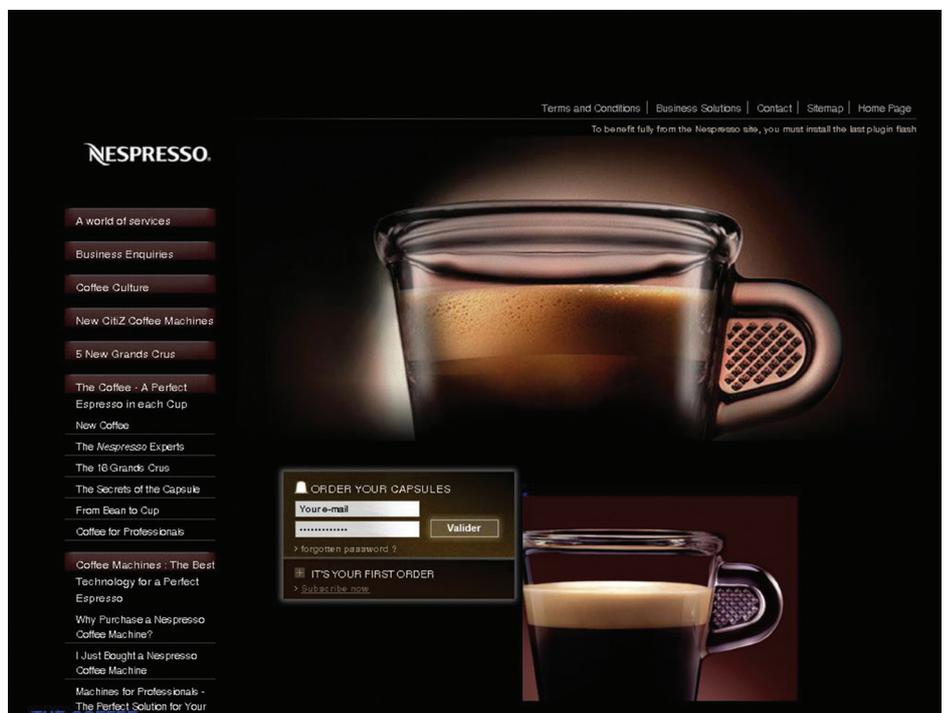
- Illy appears high in search results when searching for coffee.
- DEP does not exceed Illy in any area.

Nespresso

Nespresso is the most advanced competitor digitally as their website has very rich content. They have a webshop that is widely available across many countries, on a number of social platforms, plus a more sophisticated and rich news page. They also have a mobile app that has a store locator and allows customers to purchase machines, capsules and accessories.

Nescafé

Nescafé performs better than DEP's websites in terms of social platforms and more content. They also have a webshop for more countries and a mobile app that allows customers to order products. However, we do better than Nescafé in customer



service, since we provide customers with more ways to contact us.

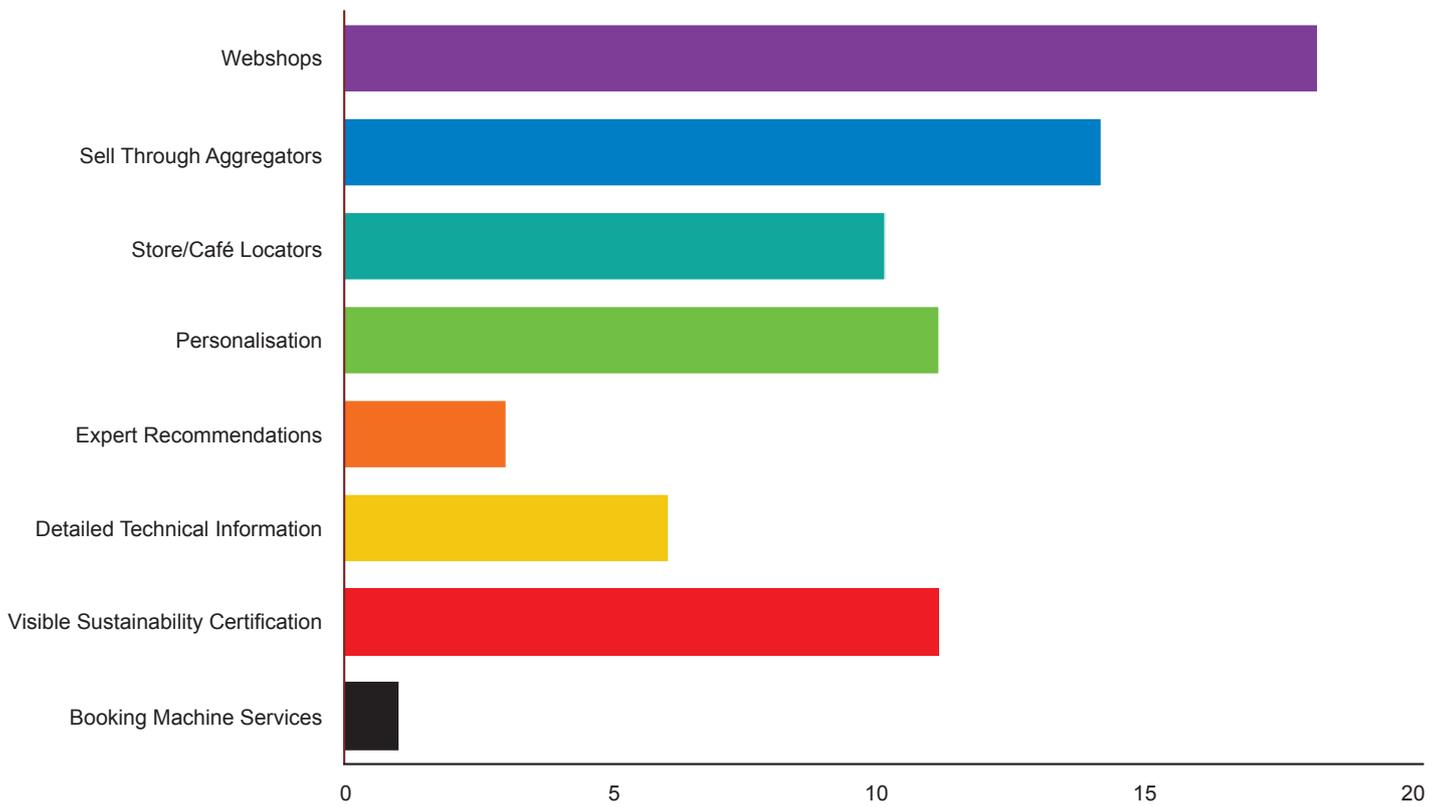
Kraft

Kraft does not do better than us in any aspects. We do better in functionality, have 2 webshops and better customer service.

Why we chose these brands

Douwe Egberts has the third largest market share (6%) after Nestlé (14%) and Kraft (7%). Nestlé has many B2B brands so we looked at Nespresso and Nescafé. Nespresso and Illy have been found to be DEP's top online competitor threats.

c. What Do Competitor Websites Offer Their Customers?



Content and functionality offered by 26 DEP competitor coffee brands (global and local)
For list of websites see Appendix 2

Of the competitor websites:



How Are We Doing Against B2B Market Leaders?

● Low ranking
 ● Medium ranking
 ● High ranking

Market Leader	Product information	Webshop	Knowledge	Personalisation	Community	Communication
DEP	High ranking	Low ranking	Low ranking	Medium ranking	Low ranking	Medium ranking
Coca-Cola	High ranking	High ranking	High ranking	High ranking	Medium ranking	High ranking
Samsung	High ranking	High ranking	High ranking	Medium ranking	Medium ranking	Medium ranking
Staples	High ranking	High ranking	Medium ranking	High ranking	Medium ranking	Medium ranking
Booker	High ranking	High ranking	Low ranking	High ranking	Medium ranking	Medium ranking
Nespresso	High ranking	Medium ranking	Medium ranking	High ranking	High ranking	Medium ranking
Illy	High ranking	Medium ranking	High ranking	High ranking	High ranking	High ranking

How DEP compares to B2B market leaders

These brands have been picked as being the market leaders through our research in terms of high levels of digital B2B functionality and content.

Again here the DEP website is taken as an average of the 5 country websites used. As such, the DEP webshop is underperforming and is ranked red since not all markets have one. Knowledge and community is also red because across an average of DEP websites it is ranked low.

a. Product Information

Overall, the DEP websites offer a medium level of product information compared to the rest of the market leaders. They have clear descriptions, product specifications, photos and downloadable manuals for the machines but could include more such as videos and more about the blends.

b. Webshop

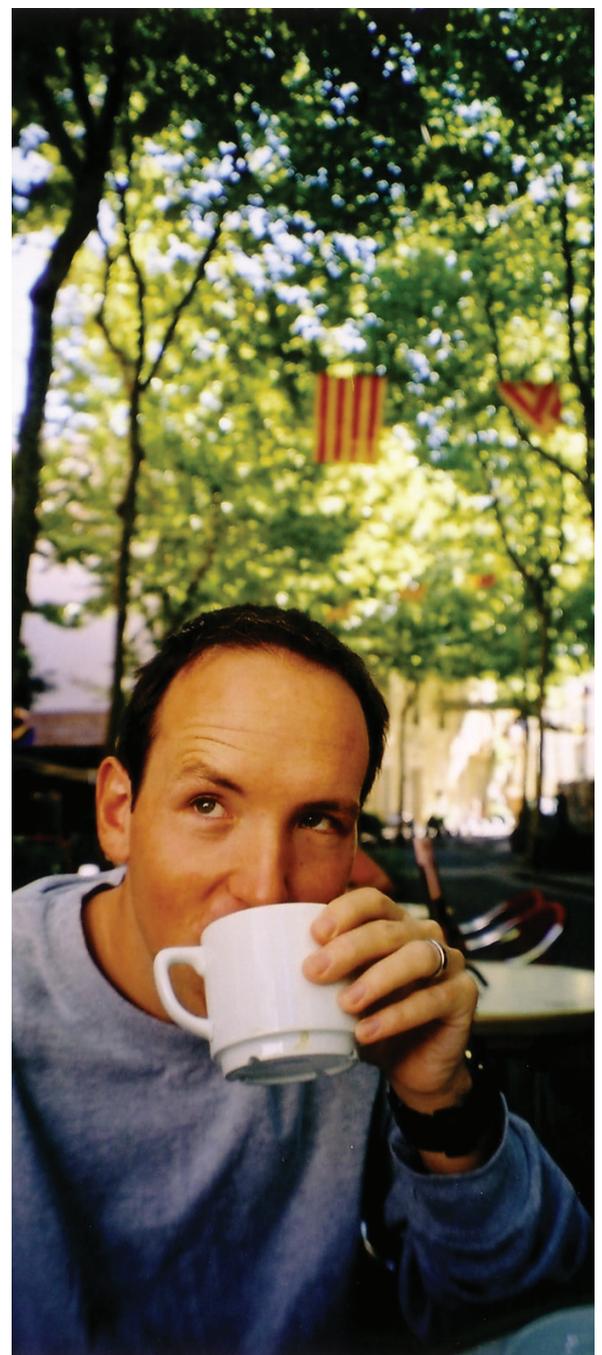
Our webshop only exists in 2 markets, so is underperforming. Illy has a webshop for 9 markets. Most of the other brands have a global webshop, rather than country specific. Booker has a very cleverly integrated reordering system too, which has meant its growth has been unprecedented, as it is so convenient for its wholesale customers. Both Coca-Cola and Booker have advanced purchasing and billing systems that integrate with customers' internal systems.

c. Personalisation

We are underperforming in comparison to some of the market leaders in terms of personalisation. Although the German, Belgian and Australian websites tailor information and products according to specific market segments, most of the market leaders do this on all of their websites. In addition, some of them such as Coca-Cola, Staples, Booker and Nespresso offer options to view product recommendations and previous purchase history in their webshops.

d. Knowledge

Our websites are underperforming by not supplying customers with knowledge such as the current trends in their product sector and how customers can market their business. For instance, Coca-Cola informs customers on the latest beverage trends, consumer trends and marketing ideas. Booker also shares macro-level data on what other customers are buying, which can inform product choice.





e. Community

The sense of community on the DEP websites is low in comparison to these market leaders. The others have news pages where their customers can read what is going on in their product industry, and specifically in their company, on their International websites. DEP only has this feature on the Dutch and German websites. The Australian website has a feature to help customers find their closest local distributor, but once again the rest of the websites do not offer this.

DEP and the rest of the market leaders are underperforming in comparison to Nespresso, which has the online “Nespresso Club” for customers in many countries. Customers can sign up online to enjoy access to many member-exclusive features such as fast access to coffee specialists, more information about the product range, and a store locator. Nespresso club customers can also use Nespresso services through their mobile to order capsules, locate boutiques and keep up to date with Nespresso news.

DEP websites are underperforming in the use of social platforms compared with Nespresso. Nespresso Reviews on Google+ posts links to specific machine reviews on the Nespresso Ratings website. There is also a Nespresso coffee drinkers group on LinkedIn, where members share news about coffee.

f. Communication

The level of communication on the DEP websites is satisfactory since customers can contact us by phone, fax, e-mail, post or fill in webforms. Two sites have online chat. A useful feature on the Coca-Cola website is that customers can find a local contact by entering their zip code. However, DEP does not use social media enough to communicate with customers when they are online.

g. In-depth

We found that the Illy and Coca-Cola websites have the most effective features on their websites for each of these categories.

The Illy B2B digital offering:

- Product info: although there is little product information for each specific product, the Illy official channel has videos on YouTube (see Knowledge section below).
- Webshop: available in 9 countries. To create an account customers have to sign up on the website. They can purchase coffee, tea, machines, accessories and merchandise. Product prices are displayed even if they are not logged in. Users can subscribe to get these delivered often, at any time you desire. They have a “small office” section where customers can choose between “offices up to 20 employees” and “offices with 20 to 50 employees”. They offer a pack that includes the most convenient machine for that amount of people, coffee and a welcome gift (mugs).
- Knowledge: they have an ‘ask the expert’ section where once customers log in they can ask anything about coffee (similar to an online forum). Their website contains a lot of general information about coffee (e.g. blending and roasting, packaging, the benefits) and

its different types (e.g. espresso, cappuccino, mocha). The Illy YouTube channel has videos about coffee preparation methods and machine information, which aims to help customers understand how to use their products.

- Personalisation: there is information for specific away-from-home customer segments, which are divided into bars and cafés, offices, restaurants and other locations. This information includes what they can offer these customers, highlighting why they should choose Illy. New customers can create an account in the webshop and receive information on special offers, view their order history, get advance notice of new products and access the Circolo Illy community.
- Community: Circolo Illy is the online meeting point for Illy customers around the world. They can post photos and exchange ideas about coffee. If you sign up to Circolo Illy you get member privileges, which include insider interviews with cultural influencers, complimentary University of Coffee courses and Illy Shop exclusives. Additionally, in the Illy Worldwide group on LinkedIn, individuals can share news and their personal opinions about coffee. Illy can also be found on Google+ offering ideas, inspiration and knowledge.
- Communication: customers can submit a question online or phone the call centre. Customers may contact Illy distributors around the world by selecting their country, which then supplies them with a phone number, fax number, e-mail address or postal address for a specific contact person.

The Coca-Cola B2B digital offering:

- Product information: there is a page about their product news. Products are divided into: soft drinks, juice, coffee, tea, smoothies, sport drinks etc. Each product contains information about category, brand positioning, target audiences, features and benefits, packaging, flavours and food pairing. Customers can download product logos to promote their store and Coca-Cola's products.
- Webshop: customers log in with their ID/e-mail and password or can register. Contact numbers for support are available. To sign up you provide an e-mail address and then fill in all your details including company name. You can then choose user type - Agency, Bottler (Int.), Bottler (US territories), CCNA Associate, Customer or Distributor. After a customer creates a password they receive an e-mail explaining that their request for the Coke Catalog has been submitted successfully to the Coke Catalog Team and is currently being processed. Once it is complete, the customer will receive an

e-mail with a link to the registration application form. However, this is only available for bottle/can and direct store delivery. The Coca-Cola system can connect with customers to receive electronic purchase orders, invoices and more through Electronic Data Interchange (EDI). EDI allows two parties to exchange documents from one computer to another.

- Knowledge:
 - The Coke Solutions (B2B) website offers: marketing ideas for customers to leverage social and digital media, enhance brand value and build loyalty. You can read success stories of other Coca-Cola customers and about beverage trends, including the latest news on what's hot, cold and refreshing. Consumer trends include insights to help convert more shoppers to buyers and more prospects into guests. Information is offered on what drives sustainable practices and how it impacts customers and business. Customers can sign up to The Refreshing Insights monthly webinar series, which is offered to all foodservice operators who want to learn about new insights, trends and how to build business strategies that can increase their competitiveness.
 - The Coca-Cola Beverage Institute for Health and Wellness website offers the latest health news. Customers can download PDFs of briefs, statements and interviews of what experts say about hydration, energy balance, physical activity, nutrition, sweeteners and caffeine.
- Personalisation happens via customer segmentation as it relates to business type. Also via the webshop.

Community: Coca-Cola has a strong social media presence - for B2B they Tweet from @CocaColaCo, which covers news from The Coca-Cola Company and has over 153,000 followers.

On the Coke Solutions website there are areas for customer comments. There are also discounts and special offers via Coke Partners, e.g. Coke Solutions visitors receive a 20% discount on professional coupon marketing tools from Travers Printing.

- Communication: phone numbers are available specifically for vending information, design machines, Coke Catalog help and Coke Solutions. The website explains how to fill out the new business request form if visitors are interested in selling their products. Customers can find their local contact by entering their zip code. The website and webshop offer animated tutorials and the FAQs page offers general information about the Coke Catalog.



“We would like to place our activities and brands where people are, rather than dragging them to our platform.”

– Prinz Pinakatt, Coca-Cola's interactive marketing manager for Europe

How Do We Compare To Our Competitors? – A Country-by-country Analysis



The Netherlands

- Overall The Netherlands is doing well against our competitors, especially in terms of search rankings. We also have fresh content through a news page.
- The area in which we could improve most is social platforms, since currently we have no presence on them.
- Nescafé is doing better than us across social platforms since, for instance, they have a YouTube channel with videos of manuals about the machines. They are richer in content and have a mobile app called Nescafé Dolce Gusto, which allows customers to order drinks and accessories, find information about a full variety of drinks and accessories, and offers online exclusives. Customers can also view what they bought last time and easily reorder through the app.
- We are generally doing as well as our competitors in terms of functionality, e-mail and mobile apps.

How we're doing in The Netherlands

● DEP underperforming
 ● DEP doing equally well
 ● DEP exceeding

					Web				Mobile app
	Search	Social platforms	News/press/blog	E-mail/contact	Content rich	Functionality	Webshop	Customer service	
Nescafé	Green	Red	Green	Yellow	Red	Yellow	Yellow	Yellow	Red
CaféBar	Green	Red	Yellow	Yellow	Yellow	Yellow	Green	Yellow	Yellow
Maas	Green	Yellow	Green	Yellow	Green	Yellow	Green	Green	Yellow
Lipton	Green	Red	Green	Green	Yellow	Yellow	Yellow	Green	Yellow

Threats: Nescafé

Germany

- Germany could improve, especially in search ranking and the webshop.
- Melitta is doing better than us in search; in terms of social platforms, Melitta Germany is on Facebook, where they share information about their products, preparation tips and news about coffee. They have a webshop and more functionality.
- Dallmayr is also doing better than us in search; they have a lot more content, an online webshop, and their customer service is better; as an example, Dallmayr has a map of where to find them on its contact page.



How we're doing in Germany

● DEP underperforming
 ● DEP doing equally well
 ● DEP exceeding

					Web				Mobile app
	Search	Social platforms	News/press/blog	E-mail/contact	Content rich	Functionality	Webshop	Customer service	
Tchibo	Red	* Green	Red	Yellow	Yellow	Yellow	Red	Green	Yellow
Kraft Jacobs	Yellow	Red	Green	Green	Yellow	Green	Yellow	Green	Yellow
Darboven	Red	Yellow	Yellow	Yellow	Yellow	Green	Red	Yellow	Yellow
Dallmayr	Red	Yellow	Yellow	Yellow	Red	Yellow	Red	Red	Yellow
Melitta	Red	Red	Green	Yellow	Yellow	Red	Red	Yellow	Yellow

Threats: Dallmayr, Melitta, Tchibo

* This ranking is due to Senseo videos on YouTube

Denmark

- Denmark is doing very well against its competition, particularly in search, social platforms, news and functionality.
- It is doing as well as its competitors in terms of mobile apps, since none of the websites have one.
- This ranking system has not gone into the depth of the user experience of the webshop, it has just looked at whether there is one. Our research tells us that the Danish webshop should improve in its interface and functionality.
- Peter Larsen is more advanced in search and content because it provides a lot of explanations that make decision-making easier.



How we're doing in Denmark

● DEP underperforming
 ● DEP doing equally well
 ● DEP exceeding

					Web				
	Search	Social platforms	News/press/blog	E-mail/contact	Content rich	Functionality	Webshop	Customer service	Mobile app
Frellsen	Green	Green	Green	Yellow	Yellow	Yellow	Yellow	Red	Yellow
Mondelez	Green	Yellow	Red	Green	Yellow	Green	Green	Green	Yellow
Peter Larsen	Red	Green	Green	Yellow	Red	Yellow	Yellow	Green	Yellow
Cafax	Green	Green	Yellow	Green	Yellow	Green	Green	Green	Yellow
BKI	Green	Green	Yellow	Yellow	Green	Green	Green	Yellow	Yellow

Threats: Peter Larsen

Belgium

- Overall Belgium is doing as well as its competitors in areas such as social platforms, news, e-mail, functionality, customer service and apps.
- It could do better in search ranking and have a webshop.
- Rombouts is better in search and content, and it has a webshop. It has a news page while the Belgium website doesn't.
- Java is better in search and content, and it has a webshop. It also has more presence on social platforms such as YouTube, where it has service videos, and on Facebook and Google+, where it shares general news and information about coffee.



How we're doing in Belgium

● DEP underperforming
 ● DEP doing equally well
 ● DEP exceeding

					Web				
	Search	Social platforms	News/press/blog	E-mail/contact	Content rich	Functionality	Webshop	Customer service	Mobile app
Miko	Red	Yellow	Yellow	Yellow	Green	Yellow	Yellow	Yellow	Yellow
Rombouts	Red	Yellow	Red	Yellow	Red	Yellow	Red	Yellow	Yellow
Java	Red	Red	Yellow	Yellow	Red	Yellow	Yellow	Yellow	Yellow
Autobar	Green	Yellow	Yellow	Green	Green	Green	Yellow	Yellow	Yellow

Threats: Rombouts and Java

Australia and New Zealand

- Australia is underperforming in areas such as search, news and webshops. It is important to note, however, that the reason for this is that their competitors are doing very well digitally.
- Most of the Australian competitors have apps. Nestlé Professional has an app that showcases the latest promotions, product information, recipes and more. Toby's Estate app lets you shop through your smartphone and also has a store locator.
- Toby's Estate is the market leader in social platforms, news, functionality and customer service. It appears high on the Australian Google search page and has a webshop. It has an app that allows customers to shop through their smartphone and also has a store locator.



How we're doing in Australia and New Zealand

● DEP underperforming
 ● DEP doing equally well
 ● DEP exceeding

	Search	Social platforms	News/press/blog	E-mail/contact	Web				Mobile app
					Content rich	Functionality	Webshop	Customer service	
Vittoria	Yellow	Yellow	Red	Yellow	Red	Red	Red	Yellow	
Nestlé Professional	Yellow	Yellow	Red	Green	Red	Yellow	Yellow	Red	
Robert Harris (Cerebos Greggs)	Red	Red	Red	Green	Red	Yellow	Yellow	Yellow	
Café Express	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Red	Yellow	
Toby's Estate	Yellow	Red	Red	Yellow	Yellow	Red	Red	Red	
Campos	Yellow	Red	Yellow	Yellow	Yellow	Red	Red	Yellow	

Threats: Vittoria, Robert Harris, Toby's Estate, Campos



Thanks for reading!

This report was

Written by Niki Gomez, co-researched by Dana Gendler, produced by Sean Murray, edited by Eva Pascoe and Liz Tray and designed by Azem William. All at The Retail Practice, London and Amsterdam.

Produced with Emma Bonar, International E-Business Manager at DEP, The Netherlands.

Inputs by DEP stakeholders across the 5 expansion markets:

Bas Schreuder, Kirsten Beider, Tina Put, Susanne Rieke and Monique Mahe.

Customer responses by 70 DEP customers across the 5 expansion markets in all sectors.

Contact

E-mail: niki@theretailpractice.com and sean@theretailpractice.com

Website: www.theretailpractice.com

Twitter: [@shopped](https://twitter.com/shopped)

Facebook: www.facebook.com/ShoppedInternational

Tel: +44 (0)7788 921 893

About us

The Retail Practice is a group of visionary marketing specialists who create lasting results through insight, collaboration, strategy and delivery. As a group, we're focused on your customers. As individuals, we're experts in today's key marketing and shopping channels. Together, we deliver joined up, lasting solutions.

The logo for The Retail Practice, featuring the words "THE RETAIL PRACTICE" in a white, sans-serif font on a dark blue rectangular background. The word "RETAIL" is in a lighter shade of blue.

THE RETAIL
PRACTICE





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Appendix 1

Each DEP Country's Website And Its Offering – The Detail

The Netherlands

Content

- About: who they are, history, strategy and ambitions, brands, sustainability policy
- Products: each product type is on a separate page - machines, coffee, tea, accessories
- On each product page there is a brief description about each product with reasons to choose each one, and a 'more information' button
- Explains how to order products
- Promotions

Functionality

- Webshop
- Webchat
- Sign up online for tailored advice on the right coffee solution for your company - they will get back to customers by e-mail or phone within one working day

Webshop

- Customers can sign up for online billing
- Receive webchat support during ordering
- Modify personal and company information
- Change postal, delivery and billing address online
- Section for previously ordered products to easily reorder products

*New customers can create an account

Customer service

- Webchat
- General phone number
- Malfunctions phone number
- Tailored advice within 1 working day
- Change postal, delivery and billing address online
- Request copies of previous invoices
- Report complaints online

Social media, apps, blogs

- News and media page

Summary

- The website is well presented and it's easy to find what you need
- Not enough technical information
- Not targeted to segments

8/10

Germany

Content

- About: their origins, passion, responsibility, brands, offers
- Industry solutions: reasons to choose DEP products according to each target segment:
 - Hotels, restaurants and cafés
 - Bakeries
 - Hotels
 - Retirement homes
- Products: one page for machines, one page for coffee, tea and more
- Service and support
- General information about coffee such as coffee growing, processing, quality testing, preparation methods, tips and more

Customer support

- Customer technical support freephone number and e-mail
- Orders for customer freephone number and e-mail
- List of all locations and dealers
- Online enquires and requests

Social media, apps, blogs

- Press page

Summary

- The website design is the same as for Belgium, Australia and The Netherlands
- No webshop
- Little functionality
- Useful general information about coffee

7/10

Denmark

Content

- About: their vision, mission, history, CSR, values, certifications, terms and conditions, partner sales, UTZ certified, information about types of coffee machines and coffee and tea they offer
- Products: one page for machines, and one for coffee and tea
- Service and support: technical service, downloadable user manuals

Functionality

- Webshop
- Webchat
- Sign up online for tailored advice on the right coffee solution for your company
- Sign up for information about their used coffee machines

Webshop

- Select favourite products which are then listed under favourites in the menu.
 - Order history allows to reorder previous orders.
 - A video illustrates how to use each of these features.
- * New customers can create an account online or by calling the customer centre

Customer service

- General phone number, fax and e-mail
- Order helpline, website and e-mail
- Service and support phone number
- DEP team with their e-mail addresses

Social media, apps, blogs

- Google+
- YouTube
- News
- Customers can subscribe to an online newsletter

Summary

- Good amount of content, especially in terms of technical and non-technical
- Design is very different than the rest of the DEP websites
- A lot of customer service options
- Not targeted to segments

8/10

Belgium

Content

- About: who they are, service and durability
- Products: each product type is on a separate page - machines, coffee, tea
- Your organisation: reasons to choose DEP products according to each target segment:
 - Small and medium-sized enterprises
 - Large companies
 - Care institutions
 - Hotels
 - Bars, restaurants or cafés
 - Education

Customer service

- Customers can fill in a form or phone specific numbers to contact each type of employee: general matters, complaint, bid for a new machine, order ingredients, quickly resolve a small glitch, report a big failure
- Customers can contact for personal advice online or call

Summary

- The website design is the same as for Germany, Australia and The Netherlands
- No webshop
- A little less content
- A lot of customer service contacts

6/10

Australia and New Zealand

Content

- DEP Coffee and Tea ANZ as a partner: sustainability, services, heritage, experts, certification
- Solutions for your business: reasons to choose DEP products according to each target segment:
 - Businesses
 - Health and care
 - Bars, restaurants and cafés
 - Hotels
 - Other segments
- Products: one page for machines, one page for coffee, one page for tea and more

Functionality

- Distributor login: you can sign up online to access restricted material or update your existing profile
- Interactive map to find a regional distributor with their postal and e-mail address

Customer service

- One general contact number for Australia and one for New Zealand
- Postal addresses for each office

Summary

- The website design is the same as for Belgium, Germany and The Netherlands
- No webshop
- Innovative map to find distributors

6.5/10

Appendix 2

Competitors' List Of Functionality/Content

This list describes the key features of each competitor's website and rates them out of 10. In brackets is the country that is a major competitor to DEP. Company names without brackets are global competitors.

Nespresso

1. Corporate responsibility: integrity, honesty, respect, fair dealing and full compliance with the law. Works closely with farmers to produce quality beans.
2. Contact by e-mail, telephone, fax, post or directly on the website. Includes a freephone number.
3. Website is divided into 3 target segments: offices, hotels and restaurants, and there are special machines for airlines.
4. Joining the Nespresso club online to order. There is a button on the home page for "quick order".
5. You can purchase capsules, pods and machines on Amazon.
6. Nespresso App: store locator and you can purchase machines, capsules and accessories.
7. Other features: allows you to share the page on Facebook, Twitter, LinkedIn, StumbleUpon, Viadeo. Nespresso Reviews on Google+ posts links to specific machine reviews on the Nespresso Ratings website. There is also a Nespresso coffee drinkers' group on LinkedIn, where members share news about coffee.
8. Summary: excellent design, easy to find what you need. **8/10**

Nescafé (The Netherlands)

1. Sustainability: responsible farming, production and consumption. Guarantees that their coffee products are 100% coffee with nothing else added.
2. Contact by e-mail, post and telephone.
3. Website is not divided according to target segments.
4. Online store only for "Dolce Gusto" products. When a user clicks on "machines", the link goes to a new page where you can buy the machine and capsules online. Customers need to register to purchase. There are additional shipping costs. Customers can also subscribe. When browsing through the products a user can choose to "add to cart" and add them to your subscription. Subscribing allows users to ship chosen products every 15, 30 or 60 days. Customers cannot check out less than 4 articles of type "subscription".
5. Customers can purchase Nescafé coffee and machines on Amazon.
6. Apps: Nescafé Dolce Gusto, which allows users to order drinks and accessories, information about full variety of drinks and accessories, online exclusive offers, view what was bought last time and easily reorder.
7. Other features: when a user registers they can choose

to connect with their Facebook profile, which allows Nescafé to view a user's public profile, friend list and e-mail address. There are specific Facebook, Google+, Twitter and Pinterest accounts for "Dolce Gusto" products. They also have a YouTube channel with videos of manuals about the machines. Users can find the store closest to them in order to purchase products. Nescafé Milano has a news page on Nescafé news. It also has a page of previous customer reviews on Nescafé coffee to help their current or potential customers understand why Nescafé is a good choice.

8. Summary: the websites have a lot of useful information, especially the Nescafé Milano website because it has information especially for businesses, including growth and profit, beverage trends, and how to understand your customers better. **8/10**

Starbucks Coffee

1. Corporate responsibility: ethical sourcing and a focus on community and environment. Publishes a global responsibility report.
2. Website is not divided according to target segments.
3. Customers can contact them by e-mail, post or phone.
4. Online store: small businesses (20 employees or less) can purchase anything from coffee, tea, machines and merchandise. Customers can get a subscription to get coffee and tea delivered regularly through automatic shipment. If the business is larger, they have to contact Starbucks by filling in an online form.
5. Customers can purchase Starbucks coffee, machines, and merchandise on Amazon.
6. Apps: none made by Starbucks - only by other sellers.
7. Other features: users can provide their employees with a Starbucks Card, which they can design themselves (for example, adding a company logo). Customers can sign up to a newsletter for the latest Starbucks Store offers and news or join an affiliate program and earn money as a small business by promoting Starbucks products online. Starbucks is on Facebook (for specific countries independently), Twitter (4.8m followers) and YouTube; their channel shows how to prepare different types of coffee and offers general information.
8. Summary: a lot of good content, especially in terms of information about the products. Many innovative features. Online shop easy to find and use. **7/10**

Benefits of creating an account:

1. Sign up to receive e-mail updates on special promotions, new product announcements, gift ideas and more.
2. Save billing and delivery information to make purchasing favourite products easier and faster.
3. Link the My Starbucks Rewards account to the Starbucks Store and gain access to special offers and

promotions that they run from time to time based on a user's rewards level. Customers will also earn Stars for purchases made online with a registered Starbucks Card.

4. Enter a Starbucks partner number to receive a partner discount on purchased products. Customers will also get a special partner badge on any product reviews they write. **8/10**

Lavazza

1. Corporate responsibility: environmentally friendly and offers sustainable products. Guaranteed high product quality through certification.
2. Website is divided into 3 target segments: at home, away-from-home (coffee shops, foodservice, and bars and restaurants) and at the office (espresso point).
3. Customer service contact e-mails and numbers: one each for people at home, at their office, and at hotels and restaurants. Number for customer helpline for the online store.
4. Online store: once a user registers they can purchase coffee machines, capsules and accessories. Customers can order for next working day delivery or 5 days delivery.
5. Customers can purchase Lavazza coffee and machines on Amazon.
6. Apps: the Lavazza Creazioni app gives users a list of food and drink products with ingredient information. The Espresso app allows a user to order machines and capsules from their iPhone/tablet and also shows store locations. There is a Lavazza Employees, Partners and Fans group on LinkedIn, which shares ideas, opinions and information about coffee.
7. Other features: users can download manuals to get more information about the machines.
8. Summary: well targeted to target segments and not too much content. Easy to find the online store. **7/10**

Illy

1. Corporate responsibility: environmental, social and economic sustainability. Earned a responsible supply chain certification from DNV.
2. Website has 2 target segment sections: at home and away-from-home (coffee bars and cafés, the office, restaurants and other locations). For each segment there are recommended products.
3. There is a phone number at the bottom of the page for customer care. There is also a button to contact the company by sending an e-mail.
4. Online store: users can purchase coffee, tea, machines, accessories and merchandise. To order online a user has to sign up on the website and can subscribe to get deliveries at any time you desire. They have a "small office" section where users can choose between "offices up to 20 employees" and "offices with 20 to 50 employees". This offers pack including the most convenient machine for that amount of people, coffee and a welcome gift (mugs).
5. Customers can purchase Illy coffee and machines on

Amazon.

6. Apps: Illy locator - shows nearby places in which Illy coffee is served (cafés, bars and restaurants).
7. Other features: users can join Circolo illy to enjoy member exclusives, including insider interviews with cultural influencers, complimentary University of Coffee courses and Illy eShop exclusives. Customers can sign up online to receive e-mails about special offers and news. There is an Illy worldwide group on LinkedIn, where individuals can share news and their personal opinions about coffee. Illy use Google+ to discuss ideas, inspiration and knowledge on coffee. They also have an official channel on YouTube with videos of coffee preparation methods and how to use the machines.
8. Summary: the website has a clear layout with a lot of useful content and features. B2B customers could easily find what they need and it is well targeted. The online shop is also easy to find. **9/10**

Kraft

1. Focus on sustainability, healthy living and social responsibility. Since 2005, they've reformulated about 1,800 products to improve their nutritional profile.
2. Targeted at all B2B customers: "Whether you're serving coffee in a high-volume hospital environment, at a banquet, or in a fine-dining setting, we have the beverage solution for you."
3. Customers have to contact them directly through the website. There is a phone number but it is only for emergencies.
4. No online store - you can only ask for them to send more information about products.
5. Customers can purchase coffee bags, coffee sleeves and cups on Amazon.
6. Apps: none.
7. Other features: Kraft Foods Group on LinkedIn and Google+. There is a search bar.
8. Summary: a lot of brands on one website is good because there is more variety but it is harder to decide what to go for. Good content in terms of product descriptions but ordering is not very clear - you would have to look at every brand individually. **5/10**

Lipton (The Netherlands)

1. Corporate responsibility: healthy and sustainable products. Rainforest Alliance Certified at their sustainably managed farm in Kenya.
2. Website is not divided according to target segments.
3. There are no contact details - you have to go to the Unilever website.
4. Online store: users can purchase all types of tea after they sign up on the website and there is a search facility.
5. Customers can purchase many types of tea on Amazon.
6. Apps: none.
7. Other features: website map showing where closest online shops are by choosing a category, a product and

then entering a zip code. Virtual agent: this allows users to type questions in and answers are shown like FAQs.

8. Summary: fun, cheerful website but not targeted to B2B customer segments. The eShop is easy to use. **6/10**

CaféBar (The Netherlands)

1. Sustainable products, machines, packaging, green transport, energy and environment, and social involvement.
2. Targeted at all B2B customers, including caterers, SMEs, large business, education, industry, the government, and health and care. There is a specific tab "business solutions", which is very useful. Users can find more adequate products by selecting how many cups are consumed in a day at your premises, then your preferred machine option, and finally the best drink solution.
3. Customers can call, e-mail or fax for help and support.
4. Online store: users can purchase coffee, tea, machines, accessories and merchandise. To order online a user has to sign up on the website.
5. Customers cannot purchase on Amazon.
6. Apps: none.
7. Other features: CaféBar network on LinkedIn. Users can directly download brochures.
8. Summary: clear and concise product information. Website clearly presented - users can easily find all the information you need as a B2B, except how to order the products. **6/10**

Maas (The Netherlands)

1. No information on corporate responsibility.
2. Targeted at all B2B customers: "Whether you're serving coffee in a high-volume hospital environment, at a banquet, or in a fine-dining setting, we have the beverage solution for you."
3. Customers can contact by phone, post, fax, e-mail, or directly through the website.
4. Customers cannot purchase online.
5. Customers cannot purchase on Amazon.
6. Apps: none.
7. Other features: downloadable PDFs for further product information and videos. Maas International is on YouTube with machine instructions. Users can sign up online to receive the Maas international newsletter.
8. Summary: a good amount of information and easy to find what you need. **7/10**

Mondelez (Denmark and Germany)

1. Corporate responsibility: community involvement, compliance and integrity, corporate governance, food safety and quality, health and well-being, and sustainable products. Publishes a yearly report proving CSR advancements, which users can download from their website.
2. Targeted at all B2B customers.

3. Customers can contact directly on the website or by post.
4. Customers cannot purchase online and it does not provide information on how you can purchase products.
5. Customers can only purchase Jacobs Espresso coffee on Amazon.
6. Apps: none.
7. Other features: Mondelez International is on Facebook with over 73,000 Likes. It is also on LinkedIn and Google+.
8. Summary: finding the coffee brand products (Kenco, Jacobs, Gevalia, Grand Mere, Tassimo, Kaffe Onko and Carte Noire) is not very straightforward because you have to look through their list of brands. Users have to then visit each one separately to find out more about the products they offer. B2B customers would struggle to find what they need. **3/10**

Frellsen (Denmark)

1. Corporate responsibility: environmentally friendly and offers high quality, healthy and sustainable products. Large selection of organic and Fair Trade products.
2. Targeted at all B2B customers.
3. Customers can contact by phone, fax or e-mail.
4. Customers can order online if they are already customers. They offer good delivery service since they bring the products all the way to your shelves.
5. Customers cannot purchase products on Amazon.
6. Apps: none.
7. Other features: by entering your zip code, a user can find a consultant that will help them to choose their most convenient coffee solution. Users can also find the best coffee machine by selecting their preferred coffee type, the number of employees, and whether it is for an office, canteen or horeca.
8. Summary: good amount of content - explanations are to the point. Well presented so users can quickly find what they need, plus friendly design. **7/10**

Peter Larsen (Denmark)

1. Corporate responsibility: environmentally friendly and have a large selection of organic and Fair Trade products.
2. There is a "catering" tab for B2B customers, which brings them to the product ranges, machine solutions and the online store.
3. Customers can contact by phone or e-mail and can also send complaints directly through the website.
4. Customers can order their machines, coffee, and accessories online.
5. Customers cannot purchase products on Amazon.
6. Apps: none.
7. Other features: the terms of use and instructional movies for the machines are clearly visible at the top of the online store page.
8. Summary: well presented so a user can quickly find what

they need, and how to get to the online store. It provides a lot of explanations, which makes decision-making easier.

7/10

Tchibo (Germany)

1. Corporate responsibility: sustainable coffee that is 100% Arabica.
2. It is targeted at all B2B customers. When a user clicks on the machines tab they can visit the “Cafissimo at work” page, which lists the most suitable products for offices.
3. Customers can contact Tchibo directly on the website, or by phone, fax or post.
4. Customers can order online after they sign up.
5. Customers can order tea, coffee and machine products on Amazon.
6. Apps: none.
7. Other features: blog including articles and videos on B2B customers expressing their opinions about Tchibo coffee.
8. Summary: straightforward and easy to use in terms of finding the products and purchasing them online. **6/10**

Darboven (Germany)

1. Corporate responsibility: environmentally and socially responsible. Offers Fair Trade products.
2. It is targeted at all B2B customers.
3. Customers can contact directly on the website or by phone.
4. Customers can order coffee, tea, machines and accessories online (you can also buy Nespresso products). There is also a special product section called “office and company” where users can find or search for a range of the most suitable products.
5. Customers can order coffee products on Amazon.
6. Apps: none.
7. Other features: they have a promotions page where users can find discounted products.
8. Summary: users can easily find the online shop and product information but there is not much content. **5/10**

Miko (Belgium)

1. Corporate responsibility: sustainable products (Fair Trade).
2. On the home page a user can quickly see “Office Coffee Machines”, which is targeted at all B2B customers. This page lists the most suitable products for offices and clearly divides them by type of system (filter, bulk brew, and coffee vending machines).
3. Customers can contact directly by e-mail or a freephone number.
4. Customers cannot order online.
5. Customers cannot purchase products on Amazon.
6. Apps: none.
7. Other features: they are on Facebook (259 Likes),

Twitter (240 followers) and Flickr. There are straightforward instructions on how to use the machines. They offer technical service and barista training as part of their service.

8. Summary: excellent presentation - from the home page a user will instantly know how to get to products, contact them, find service details and more. **7/10**

Rombouts (Belgium)

1. Corporate responsibility: sustainable products (Fair Trade). On top of the fair price, they pay the Fair Trade Premium, which allows farmers to invest in social, medical, educational and environmental projects in their communities.
2. Once a user is at the online shop they can see the B2B target segments at the bottom of the page: hotels and restaurants, hair and beauty salons, offices, cafés and coffee shops. When a user clicks on these they will be able to find the most adequate products.
3. Customers can contact Rombouts directly on the website, or by e-mail, post or phone.
4. Customers can order coffee, machines and accessories online, following login.
5. Customers can order coffee, cups and accessories such as biscuits on Amazon.
6. Apps: none.
7. Other features: offers and competitions, such as buy one get one free products. Gives tips on how to make the perfect coffee and coffee storage.
8. Summary: very useful information for each target segment, but it is not easy to find since a user has to go to the online shop and scroll all the way down. Overall it is well designed but the home page is very busy. **6/10**

Toby's Estate (Australia)

1. Corporate responsibility: ethics, sustainability and social projects.
2. Targeted at all customers.
3. Customers can contact by e-mail, post or phone.
4. Customers can order coffee, tea and equipment online, and view prices before logging in. They list recommended products, popular products and products on sale plus their top 5 products. Users can purchase a copy of the book “Coffee Trails by Toby Smith”, which comes with a 250g bag of coffee beans. By creating an account a user can move through the checkout process faster, store multiple shipping addresses, view and track account orders and more.
5. Customers cannot order on Amazon.
6. Apps: Toby's Estate app lets a user shop through their smartphone and also has a store locator.
7. Other features: users can try a barista training course for their employees. Users can also find Toby's Estate cafés on a map, sign up for offers, visit the café news page and subscribe to the newsletter. They have a media centre where users can download information on coverage that Toby's Estate receives. They also have a “what's on page”, which tells users about events they

can attend and offers they have running in-store and online.

8. They offer coffee club subscriptions where a bag of 250g coffee can be delivered weekly, fortnightly or monthly. Users can customise this by the delivery frequency, type of coffee and subscription period. Shipping is included in the price and 3 month coffee club subscriptions receive 1 month free. Their LinkedIn group, Toby's Estate Colombo, offers discussions and promotions.
9. Summary: not much information for some products but a lot of nice features and a webshop. Clear layout of the website - easy to find the information you need. **6.5/10**

Campos (Australia)

1. Corporate responsibility: very serious about ethics, sustainability and social projects and take a lot of action.
2. Targeted at all customers.
3. Customers can contact Campos directly on the website, or by e-mail, post, fax or phone.
4. Customers can order coffee, tea, gifts and equipment online and also view prices before they log in.
5. Customers cannot order on Amazon.
6. Apps: none.
7. Other features: has a global producers map. News page with latest news about what's going on at Campos. Users can subscribe to "Coffee of the Month" to receive a new speciality coffee selected from one of the prime producing regions of the world. Offers a cupping experience: sessions in which customers are able to taste at least five coffees of distinction and see the differences between regions and processing methods (this costs \$30 per person). Has a YouTube channel.
8. Summary: not much product information. Webshop and other useful features **5/10**

Costa

1. Corporate responsibility: sustainable products - Rainforest Alliance certified. Runs The Costa Foundation: implements programmes to improve the social and economic welfare within communities.
2. Target segments: corporate, individual and international franchising.
3. To register interest contact by phone or online.
4. There is no online shop.
5. Customers cannot order on Amazon.
6. Apps: none.
7. Other features: discover business opportunities - travel and convenience; pubs, bars and restaurants; hotels and leisure; education; health and care; contract catering; facilities management. Private group on LinkedIn - membership gets reviewed by manager.
8. Summary: not easy to contact (no phone numbers etc.). Useful information for target segments. **6/10**

Kenco

1. Corporate responsibility: 100% of coffee beans from

Rainforest Alliance certified farms. Recycle their cups.

2. Targeted at all customers.
3. Customers can arrange for them to call you back, send a message or register for updates. There is a phone number too.
4. Customers can't order online but you can place an order after finding a store nearest to you. Products are divided into hot drink solutions, equipment solutions and on-the-go solutions.
5. Customers can order coffee on Amazon.
6. Apps: none.
7. Other features: easy to find where to buy their products.
8. Summary: overall it is well designed and easy to find information but there aren't many features that stand out. **4/10**

Paddy and Scotts (UK)

1. Corporate responsibility: sustainable products (Fair Trade). UTZ certified.
2. Target segments: commercial coffee machines, coffee for trade - restaurants and hotels. They say they are on a mission to serve great artisan coffee at work. They understand that if users get the coffee right you'll keep your staff and visitors onsite longer; it really is a simple return on your investment.
3. Customers can contact by e-mail or phone.
4. Customers can order coffee and tea online. If you are a new customer you can immediately order your products and this creates you an account. Users can view prices before you log in and if they want to enquire about a machine they can send a message online.
5. Customers cannot order on Amazon.
6. Apps: none.
7. Other features: they have a blog about their experiences. Video on barista training - how to make the perfect coffee and what they do at the bean barn.
8. Summary: a very personal touch - in the blog and Paddy and Scott introduce themselves with a photo. Easy way to order products. **6/10**

Peet's Coffee and Tea

1. Corporate responsibility: green roasting - certified sustainable. Educate coffee farmers on how to improve coffee quality. Support and donate to organisations dedicated to bettering the lives of people who live in coffee-growing regions.
2. Target segments for business: corporate gifting, office coffee, food service and an affiliate program.
3. Customers can contact by sending feedback online, or by phoning. They offer a special number to call experts for help about tea and coffee.
4. You can order coffee and equipment online. If you are a new customer you can immediately order your products and this creates an account. Users can view prices before logging in or subscribing. There's a sale section where users can make savings if they purchase multiple

- gifts.
- 5. Customers can order tea, coffee and cups on Amazon.
- 6. Apps: none.
- 7. Other features: customers can sign up online to receive Peet's newsletter, which includes exclusive coffees and teas, special offers and in-store events. They are on Instagram. Users can find the nearest store by entering their zip code, download PDFs from the newsroom or get a Peet's card - a re-loadable debit card (for use online, on the phone or at any Peet's store).
- 8. Summary: very appetising design, everything looks very homemade and good quality. A lot of useful features and the right amount of content. **7/10**

Nestlé Professional

1. Corporate responsibility: sourcing sustainable products, recycling and reducing packaging, reducing greenhouse gas emissions, testing products so they are healthy, reducing logistics related CO2/case emissions by 50%, reducing water withdrawals globally, eliminating waste and reducing consumption of natural resources.
2. Targeted at all customers: on the global Nestlé Professional website, in each product description, it explains which segment the product would suit (hospitality, hotels, bars, restaurants, offices etc.).
3. Customers can contact by phone: one number for food enquiries and one for beverage enquiries.
4. Customers cannot order on the Nestlé professional website - they have to go to the specific brand they want to purchase (e.g. Nespresso) and go to their separate website to order the products, though this is not possible for all products. Users can find their local distributor.
5. Customers can order Nestlé and Nescafé coffee and machines on Amazon.
6. Apps: the Nestlé Professional app showcases the latest promotions, product information, recipes and more.
7. Other features: downloadable PDFs for product information and a recipes page. Users can join Nestlé Professional and get exclusive insights and ideas on how to help their operation grow. A free membership includes the e-magazine from Nestlé Professional, a personalised view of NestléProfessional.com, exclusive articles for foodservice professionals, business-building resources, tips and updates, exclusive recipes and special members only offers.
8. Summary: clear, to the point product information, with instructions and ingredient details. Plenty of nutritional information. A bit unclear if you want to find out how to purchase the products. **7/10**

Robert Harris (Cerebos Greggs)

1. Corporate responsibility: no specific information, but all coffee beans are produced in New Zealand.
2. Targeted at all customers.
3. Customers can contact them through the website by filling in a form to ask a question, make a complaint, or join a focus group. Otherwise users can contact by phone or mail.

4. Customers cannot order online.
5. Customers cannot order on Amazon.
6. Apps: none.
7. Other features: café locator. Coffee-related news and events. General information about coffee (history, how it is made, the equipment required etc.). Tips and tutorials on how to make the perfect cup of coffee. Users can sign up for an e-mail newsletter to learn more about coffee, receive tips and be informed of the latest competitions.
8. Summary: a lot of useful information for a customer that is inexperienced with coffee. Product information is to the point, without ingredient details, but tells you briefly how to prepare it, which equipment can be used for each coffee product, and the strength of the coffee. **5/10**

Café Express

1. Corporate responsibility: promote Fair Trade organic coffee and ethical tea, choose suppliers with sustainable practices, and keep packaging waste and water use to a minimum.
2. Targeted at all customers.
3. Customers can contact by e-mail, phone or post (relevant to each of their 4 locations).
4. Customers can order drinks (coffee and tea), snacks, equipment (e.g. cups and plates) and machine accessories (e.g. cleaning products) online. There is a search bar and users can sort by price from high to low or low to high. Whether you are a new or current customer, you have to call or e-mail to enquire to activate your online account. When a user signs up to order online, they can choose to be contacted with monthly specials.
5. Customers cannot order on Amazon.
6. Apps: none.
7. Other features: none.
8. Summary: since they sell products such as Nestlé and Twinings, a user has to go to the separate websites to find out about the products. The webshop is easy to use. **6/10**

Vittoria

1. Corporate responsibility: no information.
2. Targeted at all customers.
3. Customers can contact by phone, post, or by filling in an online form.
4. Customers can order online, but it directs you to a different website. Users can purchase coffee beans online only if they reside outside of Australia. Short product descriptions with prices are clearly shown. PayPal check out is available.
5. Customers cannot order on Amazon.
6. Apps: none.
7. Other features: users can sign up online to receive their newsletter for the latest product news, exclusive offers, promotions and competitions. They have an events

page, which says that tutorial videos are coming soon. Website has general information about coffee and offers some coffee expertise.

8. Summary: very sophisticated and interactive web design and good content. A bit difficult to find the online shop.

7/10

Other notes:

Amazon.com is not linked to any of the online shops. Users can only find the products on Amazon by searching for them there directly.

Appendix 3

Methodology: How We Ranked DEP Against Its Competitors

We took an average of the country websites.

The following factors have defined the average DEP website:

- The word “coffee” was searched for in each language on the relevant country’s Google search engine. When searching for coffee on The Netherlands and Denmark’s Google search engines, DEP appeared very quickly as a search result. However, DEP did not appear when searching on the Belgium, Germany, Australia and New Zealand Google search engines.
- Social platform presence is low since only the Danish website has a presence on Google+ and YouTube.
- News is medium because The Netherlands website has news and media pages; Germany has a press page and Denmark allows you to sign up online to subscribe to a newsletter.
- Customers can contact DEP through e-mail on all websites, which means that the level of use of e-mail is satisfactory.
- In terms of content on the DEP websites, on average this is medium since they all offer a sufficient amount of product information but only the German website provides general information and tips about coffee for their customers. The websites are missing detail on general coffee knowledge, trends and insight that would be useful for their customers in regard to how they can market their products.
- In terms of functionality, The Netherlands website has a webchat facility, provides downloadable user guides for their products, and gives customers the option to sign up online for tailored product advice. The Danish website also has a webchat facility and allows customers to download user manuals. The Australian website offers a distributor login where customers can sign up online to access restricted material or update their existing profile; it also has an interactive map where you can find a regional distributor by putting in your postal and e-mail address. Belgium allows customers to download product user guides.
- The Netherlands and Denmark have webshops whilst the rest of the country websites don’t. Therefore, three out of five websites demonstrate a low use of online webshops.
- Customer service stands for how easy it is to communicate with DEP in terms of service and support. The Netherlands has the highest level of communication since customers are able to contact DEP through live chat, online contact forms, and by phone, e-mail, fax or post. The Danish website has the second-highest level of communication since it also includes live chat, and customers can contact by phone, e-mail, fax, or post. Germany and Australia have a medium (satisfactory) level of communication since they offer online contact forms, phone, e-mail, fax and post. Belgium has less ways to contact, which include filling out online contact forms and phone numbers.
- Mobile engagement is low since none of the websites have an app.

Appendix 4

Website Structures

Global websites and webshops versus having one website for all regions:

DEP has a global website, which allows the user to select different country websites. Only two of the countries currently have webshops and they are both very different. The Dutch webshop is more advanced than the Danish one. Most of DEP's global competitors prefer to also have a global website where you can then select your country.

The webshops for Nescafé, Starbucks and Lavazza are not incorporated into the websites and customers are referred to another website in order to access them. Once they access the webshop they can choose from a list of countries. In the case of Nespresso, when customers are on the global website and select their country, they are brought to their country website where they can then access the webshop (which is incorporated into the website).

There are some exceptions to this, as in the case of Illy, which has one website for all regions that lets you change languages. Their webshop, however, can still be changed to several different countries. In addition, Kraft only has one global website and you cannot change the country. This has advantages for large customers across regions and in different languages. It also lowers costs and creates a cohesive brand experience across regions.

Nespresso: on the Nespresso Professional website you can change your region. Once you are on your country's website, you can access the webshop (relevant to that country). You can also change the languages on some of the country websites, e.g. in The Netherlands it can be in Dutch or English. On the MomentN website you can change the website country to US, Portugal, Norway or Brazil.

Nescafé: on the Nestlé Professional website you can change your region to many different ones. On the Nescafé Milano website you can choose to stay on the global website or choose The Netherlands, Spain, Russia, UK or France, though there is no webshop. In the Dolce Gusto webshop you can choose your region from many different ones. This is the only webshop found for Nescafé although B2B websites cannot buy machines on it.

Starbucks: on the website you can change your region to many different ones. In the webshop you can change your region to US, Canada, UK, Germany or France.

Lavazza: you can change your region on both the webshop and the website.

Illy: the website can only be changed to different languages, not regions. The webshop can be changed to several countries including Italy, France, Belgium, Germany, Austria, Spain, The Netherlands, the US and China.

Kraft: you can't change your region on the website but they do have a webshop for Australia.

Brand	Global Website	Global Webshop
Nespresso	✓	✓ in 116 markets
Nescafé	✓	✓ in 55 markets
Starbucks	✓	✓ in 4 markets
Lavazza	✓	✓ in 22 markets
Illy	× One global website	✓ in 9 markets
Kraft	×	✓ in 1 market
Lipton	×	×
CaféBar	×	× no webshop
Maas	×	× no webshop
Mondelez	✓	× no webshop
Frellsen	×	×
Peter Larsen	×	×
Cafax	×	×
BKI	×	×
Tchibo	✓ You can choose from Germany, Austria, Poland, the Czech Republic, the UK and Worldwide. Less content when you choose Worldwide	× no webshop
Darboven	✓ You can choose from a shortlist of countries	✓ German or English languages
Dallmayr	✓	×
Melitta	×	×
Miko	✓	× no webshop
Rombouts	You can change into some languages (English, Dutch, French) but not according to regions	×
Java	You can choose between French or English language	You can choose between French or English language
Autobar	✓	× no webshop
Toby's Estate	×	×
Campos	× Only divided into different regions of Australia	×
Costa	×	× no webshop
Kenco	×	× no webshop
Paddy and Scotts	×	×
Peet's	×	×
Coca-Cola	×	×
Staples	×	×
Booker	×	×
Global Wine Spirits	You can change into some languages but not according to regions	× no webshop

Appendix 5

Websites Used In Comparisons

DEP Websites

<http://www.douweegbertsprofessional.com/nl-NL/nederland>

<http://douweegbertsprofessional.com/de/homepage>

<http://www.merrild.com>

<http://www.douweegbertsprofessional.com/fr-BE/belgique>

<http://www.douweegbertsprofessional.com/au/homepage>

Competitors' Websites

The Netherlands

Nescafé

<http://www.nescafeophetwerk.nl>

<http://www.nescafe-milano.com>

Cafébar/Autobar

<http://www.autobar.nl>

Maas

<http://www.maas.nl>

Lipton

<http://www.liptonicetea.com/nl-NL>

Germany

Tchibo

<http://www.tchibo.de>

Kraft

<http://www.kraftfoodskarriere.de>

<http://www.jacobsprofessional.de>

Darboven

<http://www.darboven.com>

Dallmayr

<http://www.dallmayr.de>

Melitta

<http://www.melitta.de>

Denmark

Frellsen

<http://www.frellsen.dk>

Mondelez

<http://www.mondelezinternational.dk>

Peter Larsen

<http://www.peterlarsenskafe.dk>

Cafax

<http://www.cafax.dk>

BKI

<http://www.bki.dk>

Belgium

Miko

<http://www.mikocoffee.com>

Rombouts

<http://www.rombouts.com>

Java

<http://www.java.be>

Autobar

<http://www.autobar.be>

Australia

Nestlé

<http://www.nestleprofessional.com/australia/>

Robert Harris

<http://www.robertharris.co.nz>

Café Express

<http://www.cafeexpress.co.nz>

Campos Coffee

<http://www.camposcoffee.com>

Toby's Estate

<http://www.tobystate.com.au>

Other Competitors (Global)

Starbucks

<http://www.starbucks.co.uk/business>

<http://www.starbucksocs.com>

<http://www.starbucksstore.com>

<http://www.starbucksfs.com>

Illy

<http://www.illy.com>

<http://shop.illy.com>

<http://www.gruppoilly.com>

Lavazza

<http://www.lavazza.com>

<https://storeuk.lavazza.com>

Kraft

<http://www.kraftfoodsgroup.com>

<http://www.kraftrecipes.com>

<http://www.kraftonlinestore.com.au>

Kenco

<http://www.kencoprofessional.co.uk>

Costa

<http://www.costa-business.co.uk>

Paddy and Scott's

<http://www.paddyandscotts.co.uk>

Peet's Coffee and Tea

<http://www.peets.com>

Nespresso

<http://www.nespresso.com/pro>

<http://momentn.nespresso.com>

www.nespresso.com/ratings

B2B Leaders Outside Category**Coca-Cola**

<http://www.cokesolutions.com>

<https://fed.ko.com/cokecatalog>

<http://beverageinstitute.org>

Samsung

<http://www.samsungmobileb2b.com>

<http://www.samsung.com/uk/business>

<http://www.samsungbusiness.com/business>

<http://store.samsung.com>

Staples

<http://www.staplesadvantage.co.uk>

Booker

<http://www.booker.co.uk>

Global Wine Spirits

<http://www.globalwinespirits.com>

Appendix 6

Questionnaire Used For B2B Customer Research
(each was translated into the local language for each market)

Part 1: The DEP Experience

1. **Name**
2. **Position**
3. **Company**
4. **How would you describe your overall experience working with DEP?**
5. **How did you get to know about DEP initially?**
 - Online research
 - Word-of-mouth
 - Sales call
 - Trade fair
 - Long-term relationship
 - Comments
6. **Why do you use DEP as your beverage provider?**
 - Brand
 - Price
 - Product quality
 - Delivery reliability
 - Comments
7. **What types of products do you purchase from DEP?**
 - Coffee
 - Tea
 - Ingredients (chocolate, milk products, sugar, cups etc.)
 - Machines
 - Comments
8. **How do you currently order products from DEP?**
 - Telephone
 - Route sales
 - Online
 - Other (please specify)
9. **Would you prefer to order online? Why or why not?**
10. **What would be your preferred way to order, if you could equally use:**
 - Computer
 - Tablet
 - Smartphone
 - Telephone

Part 2: The DEP Website

11. **How often do you use the DEP website?**
 - Weekly
 - Monthly
 - Quarterly
 - Never
 - Comments
12. **Why do you use the DEP website?**
 - Information
 - Research
 - Purchase decision
 - Contact details
 - Machine/service information
 - Comments
13. **Do you easily and quickly find what you are looking for?**
 - Yes
 - No
 - Comments
14. **How happy are you with what you currently receive on:**
 - Product information
 - Quality
 - Machine information
 - Coffee and tea experience
 - Other customer experience
15. **What content or further information would you like that is not available online?**
16. **What functionality would you like that is not available online? (i.e. what else would you like to use the website for?)**
17. **Which types of web functionality would you like:**
 - Integration with their ordering, billing and paying systems
 - Training and knowledge on them and their staff
 - Social networks/community - to share experiences and knowledge
 - Communication, e.g. online chat
 - Product recommendations based on their needs and type of business

18. Do you need personal contact/face-to-face time with a sales rep before you can make a decision? Which decisions in particular are these?

19. How can we make it easier for you to make decisions using online information?

20. Additional comments about the DEP website?

Part 3: The Future With DEP

21. Can you tell us how you would like to use the following channels to liaise with DEP?

- Social media (which channels?)
- Website
- Telephone
- E-mail
- Other
- Please specify

22. Would you purchase DEP products from another website, for example Amazon (at the same price)?

- Yes
- No
- Comments

23. Would promotions or loyalty rewards impact your purchasing decision?

- Yes
- No
- Comments

24. How do you get reminded to reorder?

25. Would you like DEP to remind you, e.g. by e-mail?

- Yes
- No
- Comments

26. Would you find online chat functionality (with customer services or TeleSales) useful?

- Yes
- No
- Comments

27. What other websites/webshops do you use as part of your role?

28. What other coffee and tea brands do you think offer a great online experience and service? Why?

29. Is sustainability (e.g. UTZ, Fair Trade) important in your purchasing decision?

- Yes
- No
- Comments

30. Is there any specific content that you would like to see on the website which is not currently available?

- Customer reviews
- 3D machine images
- Service videos
- Detailed FAQs (service information)
- Service engineer appointment booking
- Coffee and tea expertise
- Other (please specify)

31. Additional comments

Appendix 7

Customer Responses - What Would You Like To See On The DEP Website?

- Tips on milk fluffing, temperatures, how to make consistent coffees one after the other; all of those kinds of things could get someone to think of becoming a DEP customer.
- At the moment they don't have much technical detail. If they can teach us something new, we are always happy to learn.
- Photos, videos, and FAQs to show to the employees, since there have been questions regarding the cleaning of the machines. Videos with cleaning instructions might be useful.
- For service engineer appointment booking I would like a 'ticket system', with a special code/number assigned to the case. A quick response of when someone will come around or contact you regarding the technical problem (or a number you can call if he doesn't), and a later follow up on the case with some feedback.
- A forum with customer experience might be interesting.
- I suggest being able to contact a customer sales representative directly when I lose my password. Maybe a button could be installed on your website.
- After purchasing a new machine, it might be handy to be provided with a digital manual.
- Promotions or loyalty rewards would be interesting for companies that purchase a big quantity of products, especially coffee products... it's nice to receive some gesture of 'thanks for being our client'.
- Being reminded by e-mail would be very practical. If you could send a reminder to a general company mailbox, a colleague would be able to do the ordering for me.
- A webchat would be nice, beneficial both to the consumer and DEP.
- A webchat would probably work because sometimes when you call you're on hold for half an hour.

Appendix 8

Customer Responses: When Customer Interaction Needs To Be Face-to-face

DE

Contract with listed products and prices which suit their needs

New products, improved products

Which coffee machine

More information on products

Estimates of the volume of coffee, special needs in every case

For changes and expansions

For purchasing a new machine

AUS

What products to order because they know my business and demographic

BE

Which coffee machines to order

They help us reorder what is missing from our stock

DK

Let us know when there are new products

NL

Only necessary to discuss what products to get when making a big purchase

Information on the new machines that can be ordered

Further explanation about products

Appendix 9

Other Websites Customers Use Professionally

DE

Bazaarkaffee

Carte Service

Vegadirekt

Lux Professional

Müller Hotelwäsche

Edna bred products

Amazon

Jomo

Ronnefeldt

Tchibo

AUS

Yardley Hospitality

Paramount Liquor

5 Senses

(None for BE)

DK

BC Catering

Hørkram

Frisko

Carlsberg

Sugo

NL

Sodexo

Sligro

Wafer

THE RETAIL
PRACTICE



DOUWE EGBERTS
PROFESSIONAL

