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# Latest Trends in B2B E-Commerce Strategies and Tech Investment

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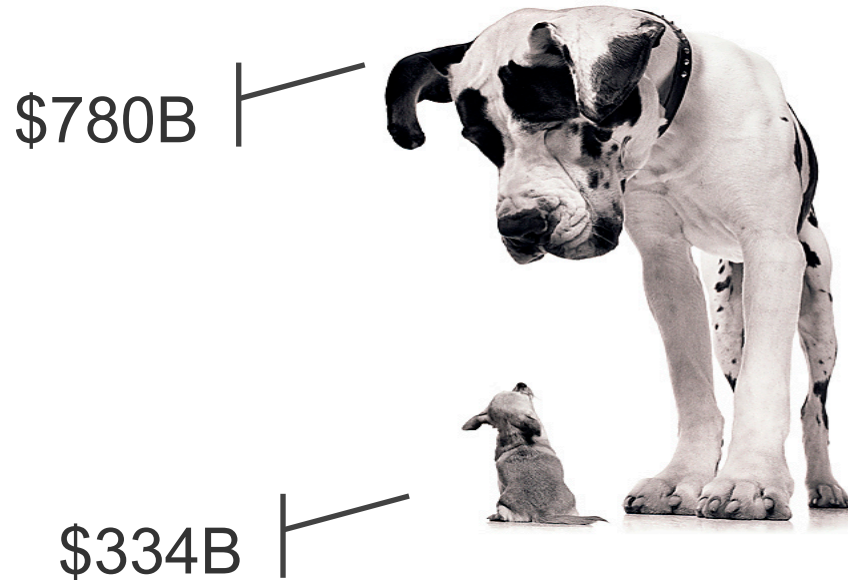
23 63  
26 98  
27 17  
28 41  
29 4  
30 88  
31 5  
32 18  
33 19

# Indy 500: Start vs. Finish

## Start

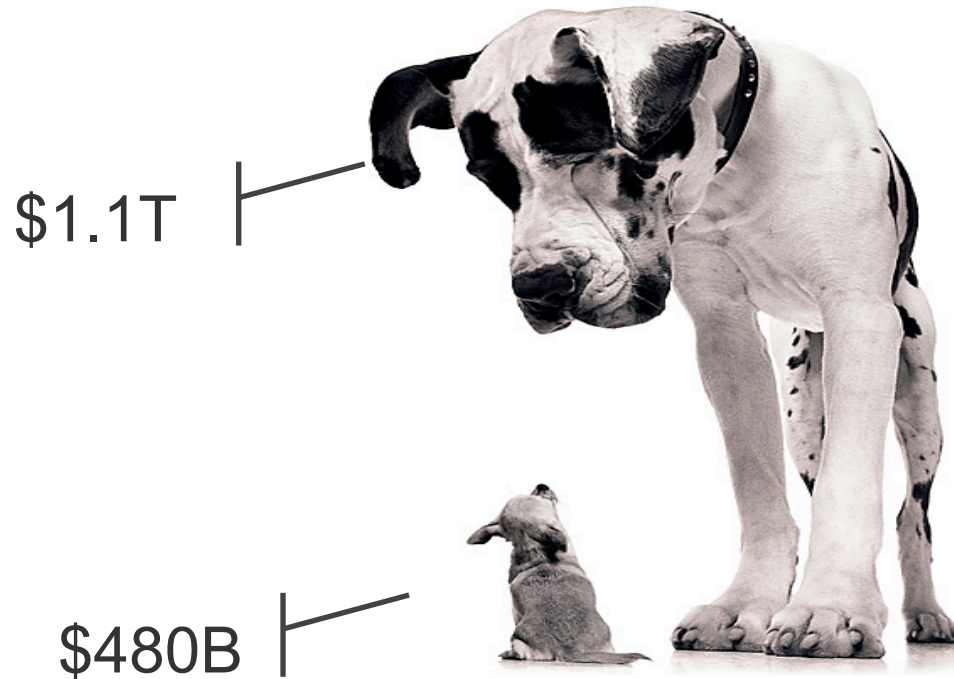
30	1		Juan Pablo Montoya
2	2		Will Power
14	3		Charlie Kimball
1	4		Scott Dixon
17	5		Graham Rahal
8	6		Marco Andretti
5	7		Helio Castroneves
10	8		J.R. Hildebrand
9	9		Josef Newgarden
3	10		Simon Pagenaud

# US B2B Is More Than 2X The Size Of B2C



Source: Forrester Research US Online Retail Forecast, 2011 To 2016, Key Trends in B2B eCommerce for 2013

# US B2B eCommerce: \$1.1T By 2019



Source: Forrester Research US Online Retail Forecast, 2011 To 2016, Key Trends in B2B eCommerce for 2013

# B2B eCommerce Accelerators



- ☐ **Competition (direct and online-only)**
- ☐ **Need to show ROI with measurable transactions**
- ☐ **Compelling new uses cases (e.g. mobile)**
- ☐ **Cost savings arguments**
- ☐ **Globalization drivers**



# B2B eCommerce Decelerators



- ☐ No explicit eCommerce leadership
- ☐ No explicit C-level support
- ☐ Heavy back-end integration
- ☐ Channel conflict

# B2B buyers already use the web to research products



**74%** research half or more  
of their work purchases  
online

Base: 126 B2B buyers

Source: Q2 2014 Forrester/Internet Retailer B2B Buy-Side Survey

# B2B Buyers Expect To Buy More Online

**30%** make half or more of their work purchases online today

**56%** expect to make half or more of their work purchases online in 3 years

*2014*



*2017*

Source: Q2 2014 Forrester/Internet Retailer B2B Buy-Side Survey

# 74%

*Buying from a website is  
more convenient than  
buying from a sales  
representative.*



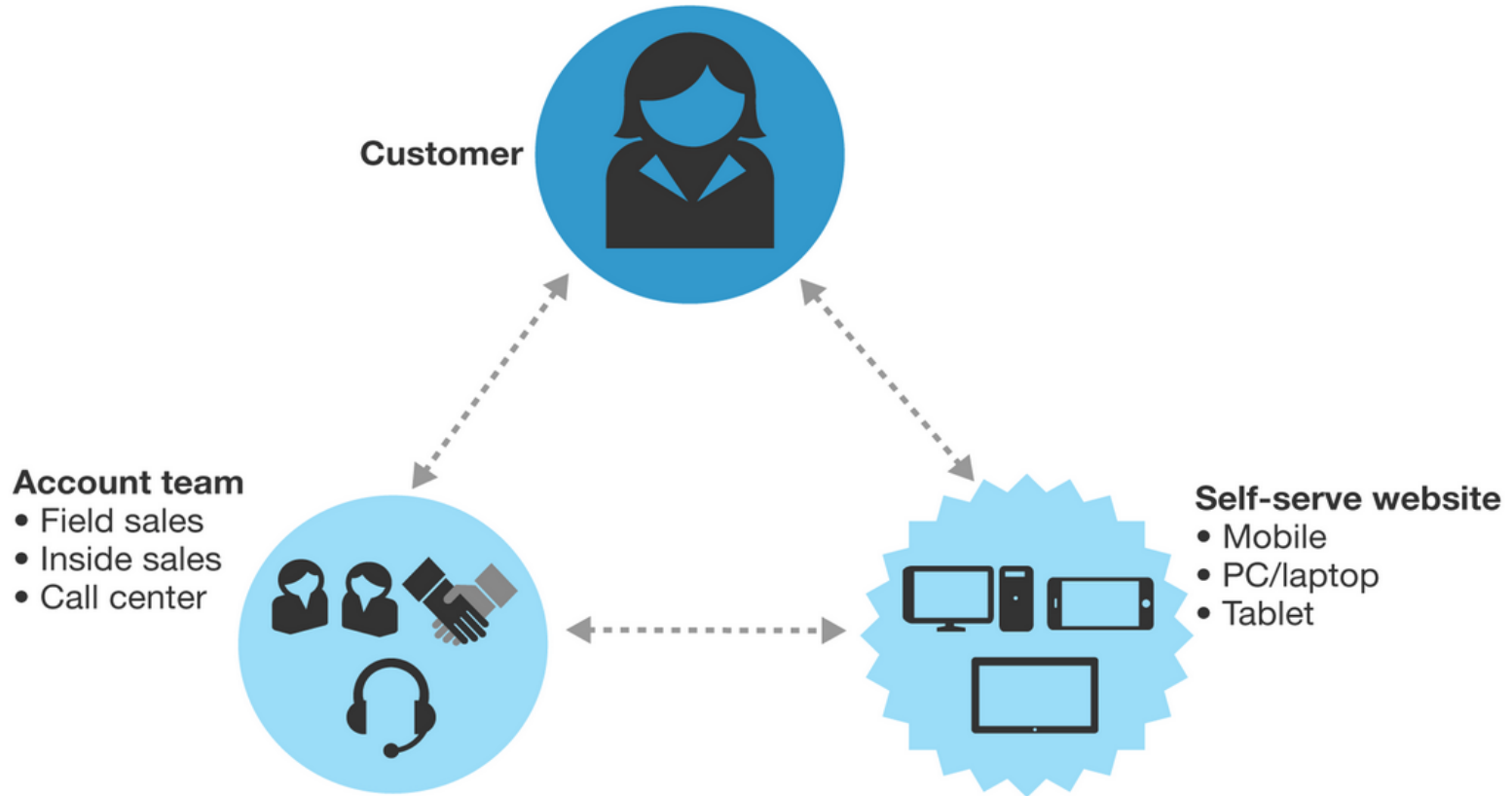


# 93%

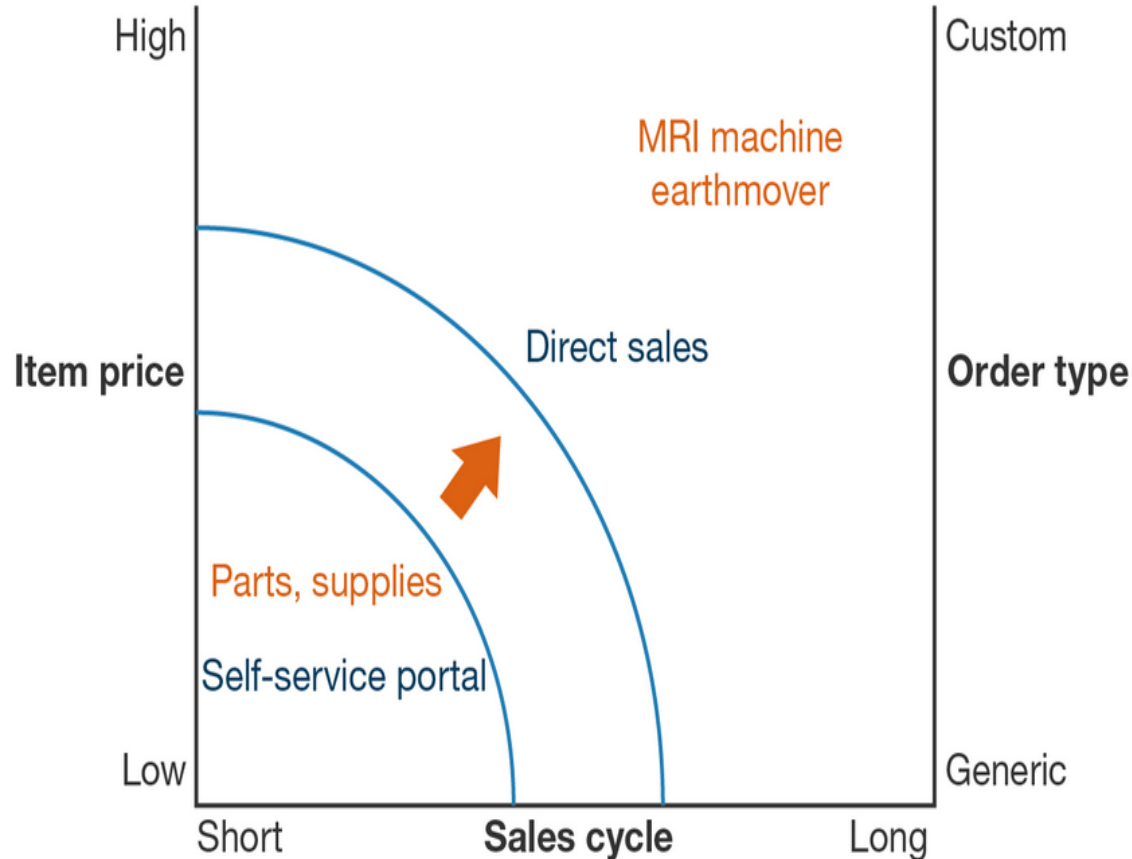
*Prefer to buy online when they've decided what to buy.*



# The Rise Of The Digitally Enabled B2B Selling Model

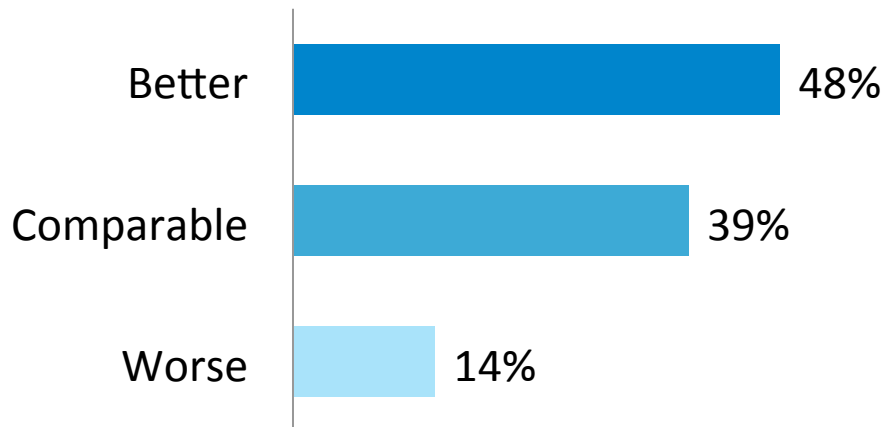


# More Self-Serve B2B Buying Experiences

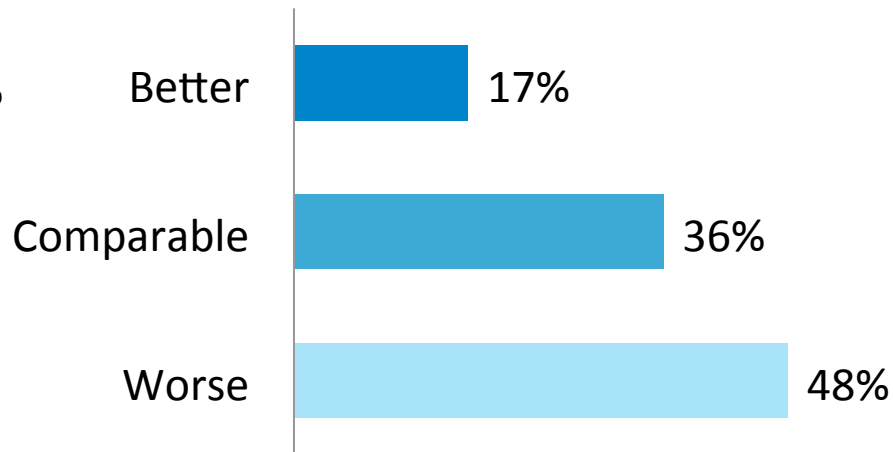


# B2B Matching Competitors...Well Behind Amazon

...Your B2B competitors



... **amazon.com**







Note: Numbers may not total 100% due to rounding

Base: 92 B2B eCommerce professionals

Source: Q4 2013 Global B2B eCommerce Online Survey done in partnership with Internet Retailer

# Becoming World Class

	Dimension	Key strategy
	Culture	Foster a culture of digital innovation.
	Organization	Organize to deliver digitally enhanced customer experiences.
	Metrics	Underpin decisions with customer-centric metrics.
	Technology	Enable with technology.



Investments in B2B commerce  
technology are on the rise



# 3/4's of B2B firms are already upgrading their eCommerce platform or plan to within 3 years

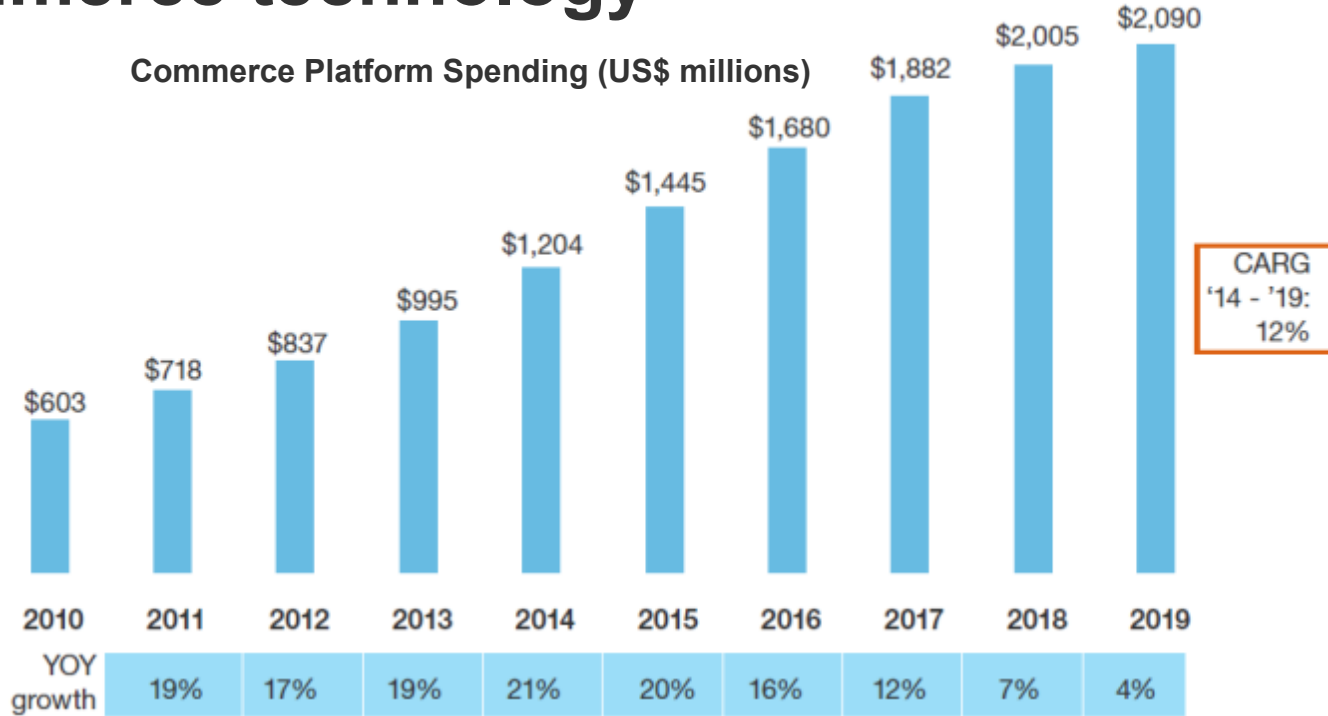
**"When, if at all, are you planning to change or upgrade your B2B eCommerce platform technology solution?"**



**Base: 68 B2B eCommerce professionals focused on technology plans (e.g., IT platform choice, infrastructure spending plans)**

Source: Forrester/Internet Retailer Q4 2013 Global B2B Commerce Online Survey

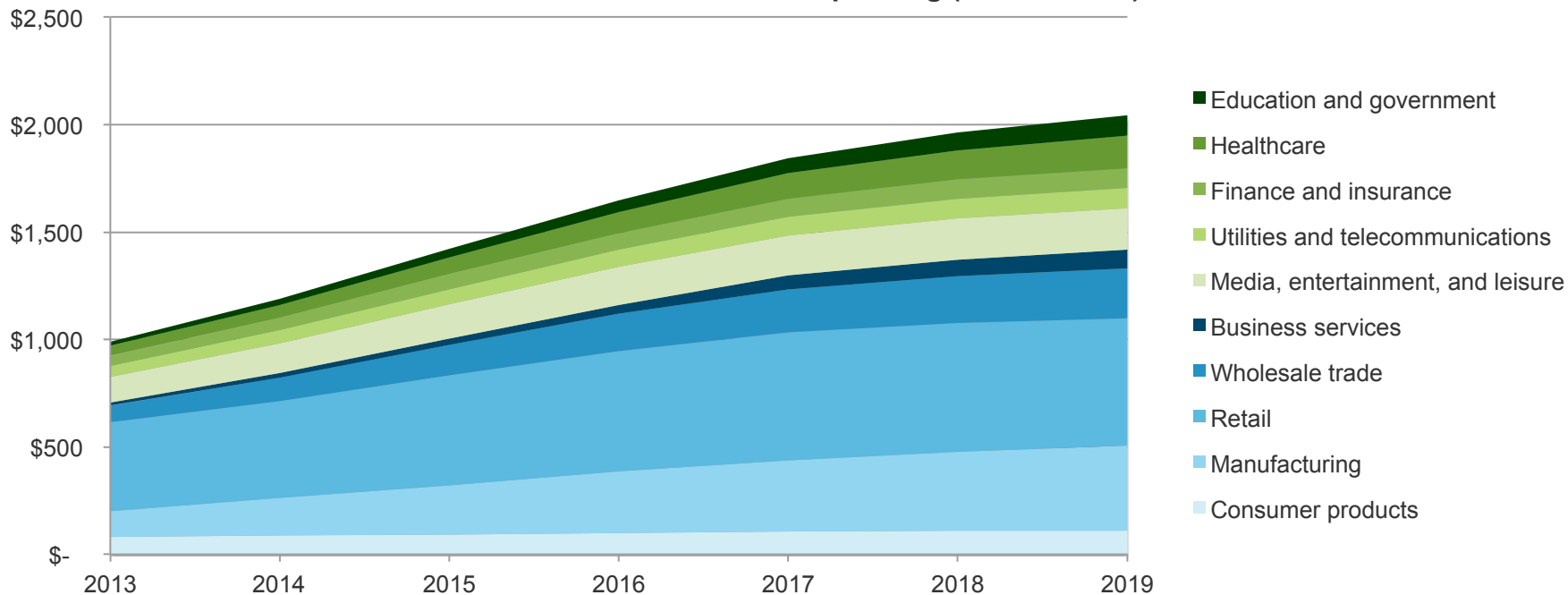
# By 2019, US firms will spend \$2.1b on licensing commerce technology



Source: Forrester Business technology ForecastView

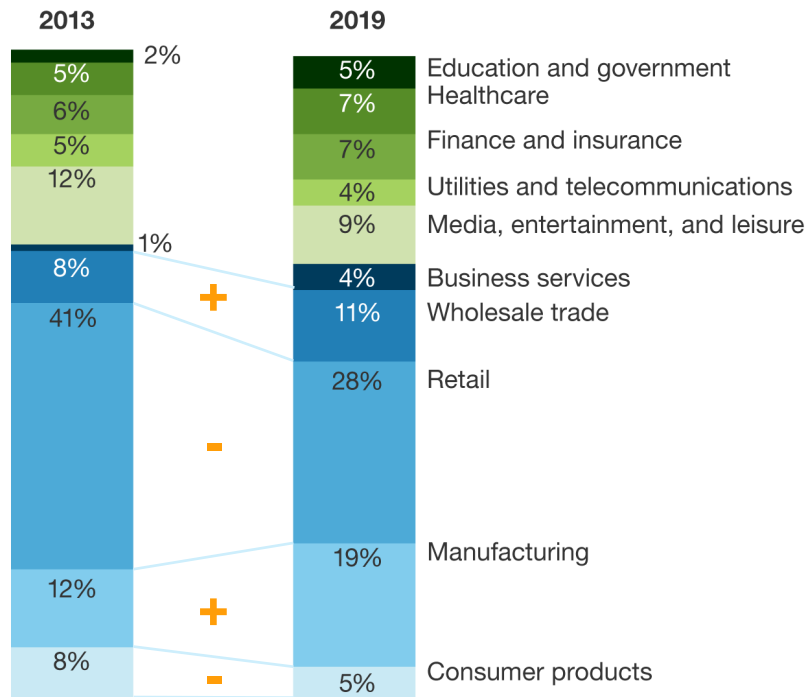
# Manufacturing & Wholesale are driving this growth

US Commerce Software Platform Spending (US\$ millions)



Source: Forrester Business technology ForecastView

# By 2019, B2B firms will spend more on commerce technology than online retailers do



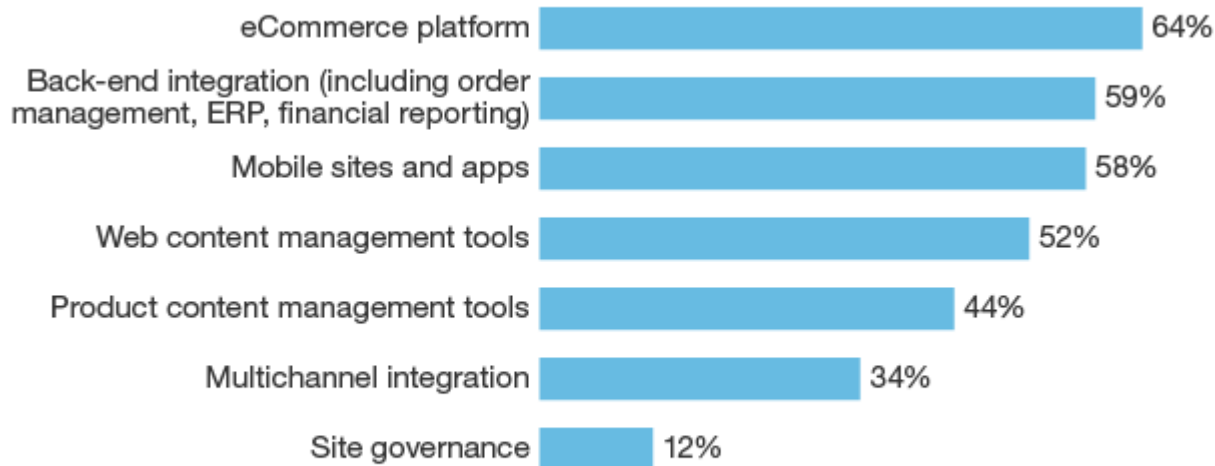


# Platform Trends



# Replatform initiatives top the priority list

**“What are your technology investment priorities for 2014?”**



**Base: 73 B2B eCommerce professionals focused on technology plans  
(e.g., IT platform choice, infrastructure spending plans)  
(multiple responses accepted)**

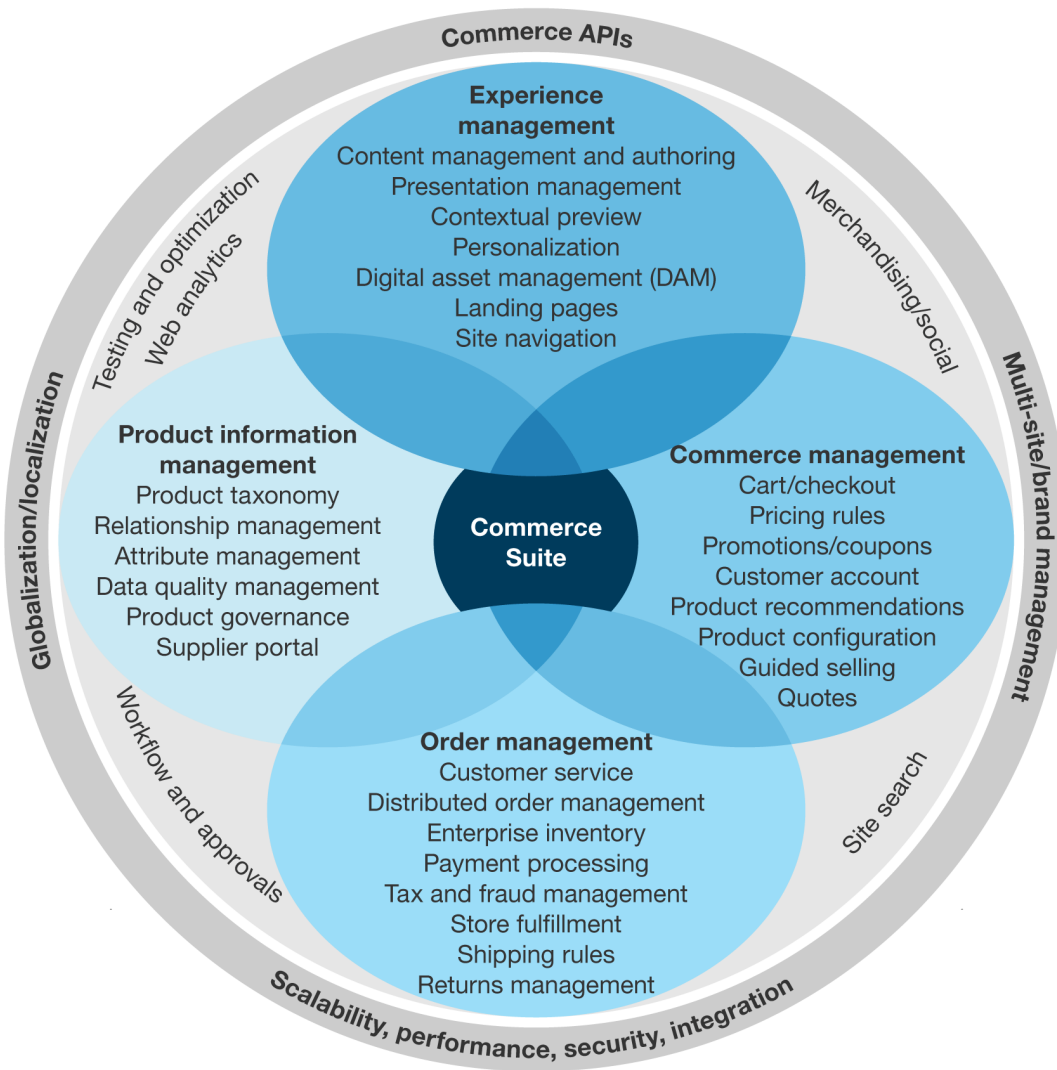
Source: Forrester/Internet Retailer Q4 2013 Global B2B Commerce Online Survey

# Commerce is just part of a broader digital experience delivery program for B2B firms

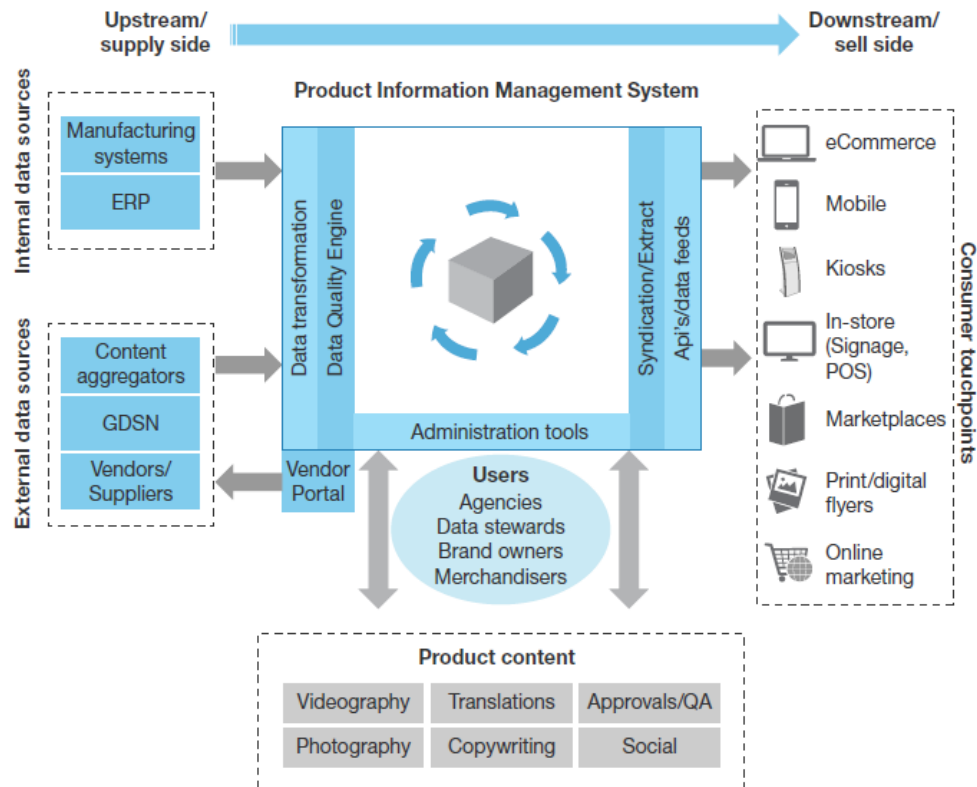


**Today most B2B firms are upgrading to the full “Suite”**



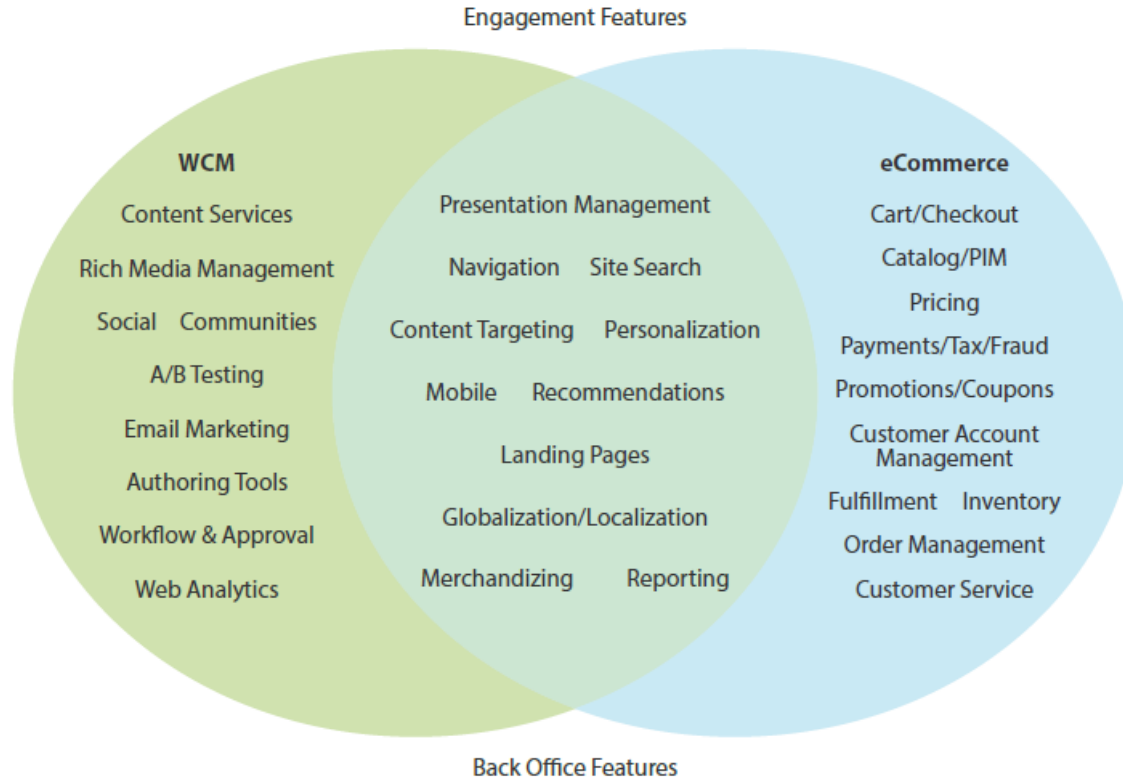


# PIM is a foundational necessity for B2B firms



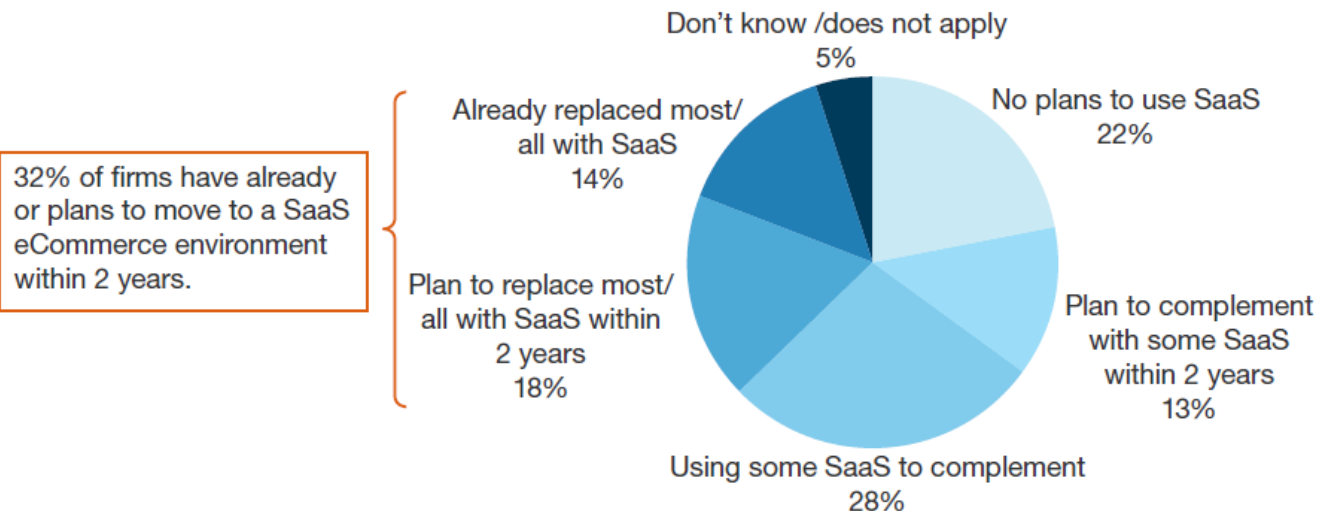


# Many B2B firms integrate eCommerce and WCM



# B2B firms are showing an increased interest in SaaS

“What are your firm’s plans to use software-as-a-service (SaaS) to complement or replace your existing commerce software?”



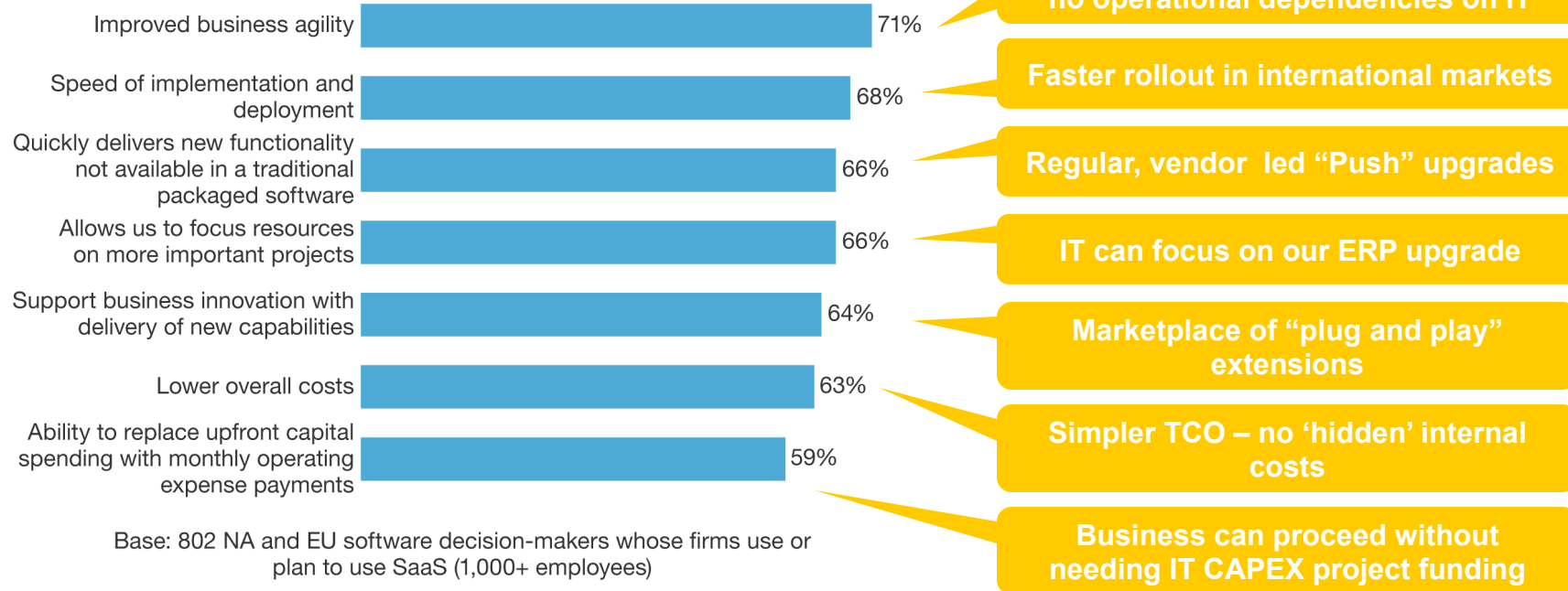
Base: 439 North American and European retail, wholesale and manufacturing software decision-makers (20+ employees)

Source: Forrester's Business Technographics Global Software Survey, 2014

# The benefits of SaaS for B2B commerce

**“How important were the following benefits in your firm’s decision to use SaaS?”**

(4 or 5 on a scale from 1 [not at all a factor] to 5 [very important factor])




Source: Forrester’s Business Technographics Global Software Survey, 2014

# B2B eCommerce is an extension of B2C



- eProcurement
- Guided selling
- Order entry & requisitions
- Organization hierarchies
- Dealer management
- Contract management
- Budget/spend management
- Configure/Price/Quote (CPQ)
- ERP Integration
- Contract pricing
- Approvals workflow
- Policy management



A photograph of two adjacent doors set into a red brick wall. The door on the left is bright yellow and is labeled 'B2C'. The door on the right is bright red and is labeled 'B2B'. Both doors are framed by white arches and have brass mail slots. To the left of the yellow door is a green bush and a black lantern-style light fixture. To the right of the red door is a black mailbox and a black metal fence with gold-colored finials. Pink flowering branches hang over the top of the red door.

**B2C**

**B2B**

**Many firms are consolidating  
their B2B and D2C technologies**



# Thank you

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