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THE CUSTOMER JOURNEY ON THE eCOMMERCE B2C WEBSITES IN THE FOOD INDUSTRY

Relatore: Chiar.mo Prof. Riccardo Mangiaracina
Correlatore: Dott. Samuele Fraternali

Tesi di Laurea di:
Andrea Girelli Matr. 836910

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ABSTRACT

The birth of internet and the flourishing of new technologies connected to it, like the coming of the smart devices, have changed the way people interact among their peers but also changed drastically the daily life activities, enabling a paradigm shift in the customers-firms relation.

In this environment, the eCommerce has become a common subject related to all the sectors and day by day, the firms are becoming more aware about the potentiality of this channel.

The Food sector could be considered nowadays, one of the most green and unripe sector in the digital market, but in the last years it has demonstrated to be a sector full of potentiality, catching the interest of firms all over the world. Even though it has arisen easily the attention of the market, there is still a lack of study on this subject and, for this reason, this thesis takes the opportunity to contribute to its fulfilment.

Starting from these considerations, my study has the objective to investigate the level of development of the Customer Journey among the eMerchants that operate in the *Food* or *Wine* sector, offering different services, from the more traditional eShop to the *Delivery Services*.

The *Customer Journey* represents the path undertaken by the users, along the services and features offered by the eRetailers and it is characterized by several phases that go through the *Site Access* to the *After Sales* processes, passing by the elements of *Product Discovery*, *Product Presentation* and the moment of *Check Out*.

As a matter of fact, the thesis started considering Flagship eStores, *Food Delivery* platforms, Flash sales merchants, Marketplaces and other platforms linked to *Food* and *Wine* distribution, excluding the exploration the GDO sector, in order to have a broad glimpse of the actual eFood situation.

Thanks to a buying process simulation, through the websites of Italian and international firms, it has been possible to investigate the level of commitment of different kind of merchants operating in the eFood sector.

Lastly, the work has tried to understand which moments of the *Customer Journey* attract most the focus of the merchants and where they have been able to introduce innovative features to satisfy the online Customer Experience.

KEY WORDS: *Customer Journey (CJ), Online Customer Experience, eCommerce, eFood, Food, Wine, eShop, Food Delivery Services.*

SOMMARIO

La nascita di Internet e la conseguente esplosione delle nuove tecnologie connesse ad essa, come l'arrivo degli smart devices di ultima generazione, ha cambiato non solo il modo in cui le persone interagiscono tra di esse, ma ha avuto un effetto drastico anche sulle attività di tutti i giorni, innescando uno slittamento di focus tra le dinamiche cliente-venditore.
In questo contesto, l'eCommerce è diventato materia comune a tutti i settori e giorno dopo giorno, le industrie stanno diventando sempre più consce della potenzialità di questo canale.

Il settore agroalimentare può essere considerato attualmente uno dei settori più verdi e acerbi nell'ambito dell'eCommerce, ma negli ultimi anni ha dimostrato di essere uno dei settori con elevata potenzialità, attirando così l'interesse di aziende da ogni parte del mondo. Nonostante sia stato in grado di attirare facilmente le attenzioni del mercato mondiale, tramite l'analisi letteraria è stata registrata una certa lacuna nello studio di questo settore, e per questo motivo, è stato deciso di esaminare le tematiche legate a questo campo, in modo da contribuire al completamento di questa tematica.

Partendo da queste considerazioni, lo studio ha l'obiettivo di indagare il livello di sviluppo del Customer Journey tra gli eMerchants che operano tra I prodotti alimentari e vinicoli, offrendo servizi diversi, dai più tradizionali eShop ai nuovi servizi di Food Delivery.

Il Customer Journey rappresenta il percorso intrapreso dagli utenti attraverso i servizi e le features che vengono proposte dagli eRetailer ed è caratterizzato dalle diverse fasi che partono dalla *Site Access* fino ai processi finali di *After Sales*, attraversando i momenti di *Product Discovery*, *Product Presentation* e quello più critico di *Check Out*.

Per avere un ampio spettro della situazione attuale, la tesi ha quindi preso in considerazione gli eStores monomarca, le piattaforme Food Delivery, attori Flash sales, i leader nel mercato dei marketplace e altre piattaforme legate a prodotti simili, lasciando al di fuori di questa analisi il mondo degli attori della grande distribuzione.

Attraverso la simulazione del processo di acquisto sui diversi portali online, di attori Italiani e non, è stato possibile analizzare il livello di impegno dei diversi attori di questo settore.

Infine, il lavoro di tesi ha cercato di capire quali momenti della Customer Journey hanno attirato di più l'attenzione e l'impegno degli attori del settore, con l'introduzione di nuove features innovative al servizio di una completa online customer satisfaction.

PAROLE CHIAVE: *Customer Journey (CJ), Online Customer Experience, eCommerce, eFood, Food, Wine, eShop, Food Delivery Services.*

EXECUTIVE SUMMARY

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1. PREMISE

As the eCommerce has become an actual and tangible element of the everyday shopping, the interest in the development of a reliable and satisfactory customer experience has become an important focus for all the firms that are willing to increase their sales thanks to this innovative channel.

The papers' study has highlighted the factors that mostly influence the purchase selection and then, where the necessity of development of the features lies on.

Confidence, safety and ease-to-use are the basis for a persuasive eShop in all the market and sectors.

The purchase methodologies and the delivery options lead the innovation in this channel but also the visual and the level of products' information are essential to accomplish the customers' desire to buy.

The creation of a reliable customer experience, should take into consideration all the phases composing the Customer Journey starting from the "*Site Access*", going through the "*Product Discovery*" and "*Product Presentation*", concluding with the "*Cart Management and Check Out*" and the "*After Sales*" moments.

SITE ACCESS	PRODCUT DISCOVERY	PRODUCT PRESENTATION	CART MANAGEMENT & CHECK OUT	AFTER SALES
Homepage Access	Search	Description	Cart Management	Purchase Confirmation
Homepage Surfing	Filtering	Images	Purchasing Modality	Newsletter
Account Management	Browsing	Price & Other Options	Shipping Options	Order Tracking
Homepage Features	Sorting & Ordering	Reviews	Payment Options	Return Management
	Produce Preview		Related Services	

Figure 1: Scheme of the principal functionalities (also called macro elements) for each phase of the CJ

The food sector is one of the last developed in the digital channel but, through the papers and the data collected along the literature analysis, it has been shown a growing interest for this particular sector that, furthermore, benefits of a high level of potentiality.

The first actors that landed the eChannel in the food and beverage, were the wine cooperatives, underlying the strong interest and attention that the wine has arisen in this new channel, followed by the groceries departments.

After them, the restaurants came, with the introduction of personal home pages and the table-booking possibility, that leads to the escalation for the birth of the food delivery services in the last few years.

Pros and cons of the eFood have been considered along different studies, investigating the possible future of this sector, that have found in the birth of the smartdevices application an additional element to develop new services, shortening even more the distance between users and merchants.

2. OBJECTIVES

The aim of the thesis is to analyse the factors and the features of eShop websites, that influence the customers' approach in the online food retailing, understanding which ones are more determinant in increasing the conversion rate of a specific website and letting the users enjoy their personal online experience.

The results want to highlight where the focus of the different type of merchants is and where, according to their cluster, they perform at best in the different phases.

The online research investigates the several types of merchants present in the eFood market, from native Dot.com groceries to Wine cooperatives, from marketplaces to food delivery services to the most innovative services introduced (recipes and chef's dishes on delivery).

Different channels have been selected for this study: *Browser*, *Mobile Site* and *Mobile Apps* in order to understand the level of commitment of the merchants in all the possible eChannels and the differences among these channels under the concepts of features and innovation level.

The comparison between the actors wanted to show which one, among them, was the best and which the weakest one, understanding why some phases did not reach the same results of others.
The results want to point out a comprehensive glimpse of the actual situation and where the different merchants should focus more, in the next future, to continue their growth in the digital market.

3. METHODOLGIES

The thesis is composed essentially by two main parts. The first, linked to the Literature analysis of the papers, investigating the field of interest. The second is linked to the empirical research made to compare the different merchants in the sectors, considering three different channels (*Browser*, *Mobile*, *App*).

So, the first step, made for the development of the thesis, has been a broad analysis of the literature, considering scientific papers, white papers and researches linked to the field of the Customer Journey and the development of the eCommerce into the food sector.

The analysis has been made trying to understand how the previous studies have presented the evolution of the eCommerce in the food industry and which fields of the CJ and Customer Experience have been covered more through the several theoretical and empirical studies.
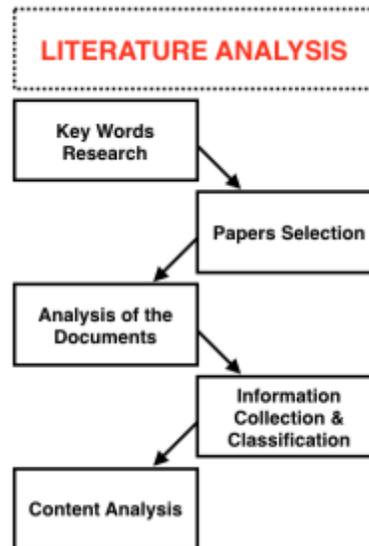
Figure 2: Scheme of the Literature Analysis process step by step

Numerous sources have been used to find the right papers, using key words as: Customer Experience, Online Customer Experience, Customer Journey, eCommerce, eFood, mCommerce.

Then, thanks to the use of an Excel file, all the papers have been classified, distinguishing the methodologies of study used and the topics covered by each document. The documents were linked to different subjects and different markets and this helped to have a broader sight of studies from different contexts and nationalities.

Through these first steps, it has been possible to understand the level of study linked to these topics and where the most of the papers have brought their attentions.

The results from the literature analysis, show that the most of the attention has landed to the comprehension of the factors affecting the "Buying Decision" for the customers.

Different questions have been pointed out on the general use of the eCommerce and the two most addressed issues were linked to the perceived risk of leaking personal and financial information and the possibility to create tailored services for the final customers.

The main scope of the firms, is to convert the customers, who landed at the first place on their webpages looking for information, into effective shoppers.

The sequence of events in the website, must be able then, to let the users learn about the purchase and interact with the company offerings, trying to fill the gap with the physical customer experience, putting in place great efforts to make the users feel more familiar with the digital environment, fostering their willingness to purchase. Without any doubts, one of the element that enable this process is a good and reliable product presentation in the first place.

So, the possibility for the merchants to succeed in this challenge is linked to the development of innovative and solid features and services for the final customers, creating balance between the usefulness and graphical aspects (soft content) of the website along all the CJ and avoiding the information overload.

As a matter of fact, the product quality, proposed on the online channel, is never a sufficient element to foster purchase intention. This is due to the fact that the eShoppers are also looking for other elements when approaching the digital channel, as entertainment and utility combined with responsiveness and security.

Along with these elements, a particular attention should be played into the development of reliable customer support, to sustain the eShoppers during their purchase process and to answer the possible thoughts and questions arisen from the CJ.

From the last group of papers analysed, it has been presented how the Internet and mobile apps, combined with the birth of the smart devices, have revolutionized the interaction of the customers with the retailers and how, through them, the merchants have been able to engage new services that enhance the level of commitment of the consumers.

The technology has been a facilitator also of a customer behaviour shift, that brings the clients to be proactive today more than ever, with a continuous inclination to seek information and to share opinions with their peers.

Finally, it has been pointed out that the social media have also forwarded these effects and have created a sharing platform that helps eShoppers to ask for advices and that has become essential for the eShoppers.

The second part wants to capture, through an empirical research, all the features in the customer's offer that are presented by the principal merchants on the online market, divided by the several stages following the phases of the CJ, understanding the main focus and the direction of the players in the market.

The aim is then, to find a picture inclusive of all the features suggested by the websites selected and to analyse the phases that should reveal which ones, among the five phases of the CJ, are the most structured and received the greatest attention from the several merchants, searching in three different channels (*Browser*, *Mobile Site* and *Mobile App*).

The sample's base is constituted by 42 merchants operating in the eCommerce as online groceries (no GDO), *Wine* shops or *Food Delivery* services. They have been chosen within and outside the Italian market, considering Traditional retailers that developed their own eShop and Dot.com, Marketplaces and food specific platforms.
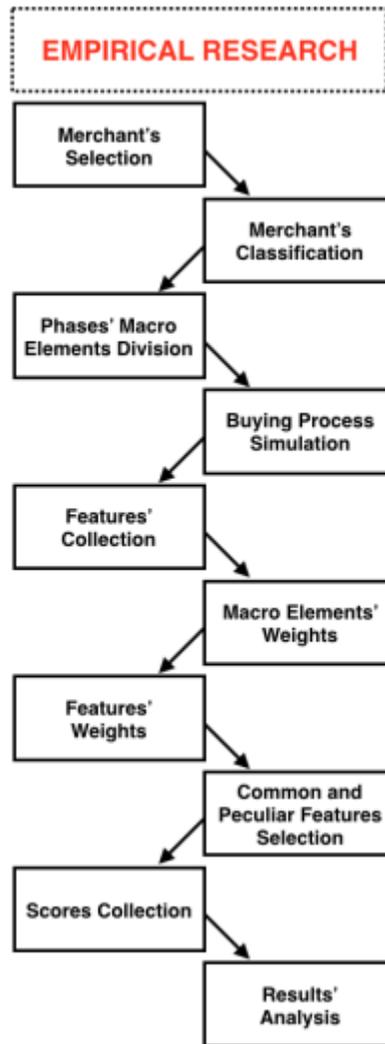
Figure 3: Scheme of the Empirical Research process step by step

The research started with the identification, for each of the five phase of the Customer Journey (i.e. *Site Access, Product Discovery, Product Presentation, Cart management & Check Out, After Sales*), of the principal functionalities. This has been made in order to help the collection and the organization of the features found within the website.

The collection of the features has been made through a buying process simulation and, with the support of an Excel file, they have been collected according to the phases they belong to.

After the collection of the data and the features' check for all the websites, the next step has been the weights assignment. For each feature a weight has been associated and in doing so, the level of importance and the innovation have been taken into account.
Actually, the weight assignment happened in two stages:

1) The first weights have been assigned to the principal functionalities (see Figure 1) of the phases according to their importance within the phase;

2) The second weights have been assigned to the several features founded in the websites, associated to the several functionalities of the phases. This time the innovation has been the criteria that has driven the weights' assignment (i.e. higher weight for more innovative features introduced);

The way the weights have been allocated to the principal functionalities of the phases, has been on an arbitrary base, after a moment of study and research through the previous presented papers (literature analysis) and other information acquired.

Subsequently, there has been a moment of reflection on the several business models seen (*Food*, *Wine* and *Delivery*). A consideration has been made on the different level of features offered and on the commitment in the phases, according to the different aims and services offered. So, some business-peculiar elements have been found. They represent the features that more easily could be developed in some specific business, e.g. "*Restaurants ratings*" for the *Food Delivery* or "*Recipes*" and "*Shopping Hints*" for the *Wine* and *Food* Sectors.

Generally, the merchants have introduced the features, peculiar of the typology of products that they offer, increasing the scores of the phases that, that type of merchant, care the most. These type of elements have been called Peculiar elements and they are strictly related to the business segment they belong. Thanks to this differentiation among the peculiar elements and the ones that are, instead, in common (common elements) to all the merchants it has been possible to avoid biased results during the comparisons and then to separate the results into two levels:

1) The first results were linked to just the common elements of the actors, using therefore, criteria linked to the same possibility of implementation for all the features by all the merchants. Thanks to them, it has created the possibility to find a general path of the entire eFood market, with general trends;

2) The second group of results have introduced the peculiar elements too in their analysis, having so a wider base for all the sectors and typologies, with the overall scores of the merchants operating in different sectors. In this way it has been possible to compare the wholly results of the merchants, understanding where the different typology of sectors perform the best;

The final results of the empirical test are displayed showing several types of comparison among the typology of channels, products and merchants, taken into consideration during the study having, then, a broader picture of how the innovation has been introduced according to the different typology of merchants. At the end, a ranking scheme with the best and the worst practices among the merchants has been also displayed.

4. RESULTS

The last two chapters present the final conclusions of the empirical research and some thoughts on the present and the possible future situation of this sector.

An initial hypothesis, antecedent to the research, has been made according to the level of attention played by the different typologies of merchants considered. It stated that, according to the different type of business developed, the focus on the phases could not have the same weight. For instance, the *Product Presentation* could play a key role for the *Food* and *Wine* merchants, careful of the information needed for their type of products, while in the *Food Delivery* sector, the attention could be more focused on the promptness of the service and the delivery stage.
The overall results confirm this hypothesis, showing different phases performances according to the different type of products proposed.

The merchants' scores have been shown on a basis of a maximum of 5,00 points, given by the fulfilment of the performance (100%) for each of the five phases of the CJ. The results have been calculated using the presence of the features, multiplied per the weight of the specific feature. This process has been made for each principal functionality within all the 5 phases.

The first results shown, highlight the general trends of the market.
The 1st (*Site Access*) and the 5th (*After Sales*) phases, have scored the best results, having performed higher means against the other phases. They have shown the best and the richest implementation of the features in their stages and probably these results could be linked to the fact that, on one hand, we have the first touching point that impacts the customers perception of the retailers and, on the other side, a phase that in these field, did not need specific and numerous features or services to be implemented.

The weakest phase then, has been revealed in the 3rd one (*Product Presentation*) and this outcome, could be linked to 2 main aspects:

1) The presence in the study of the *Food Delivery* actors, has decreased the performance in this specific phase, as, for their nature, they do not develop in an exhaustive way the level of information linked to the products, as they rely on the information of the restaurants' menu.

2) The high level of innovation and the high number of features that could be developed in this phase, made the achievement of a full or high score, that could be reached by just few players.
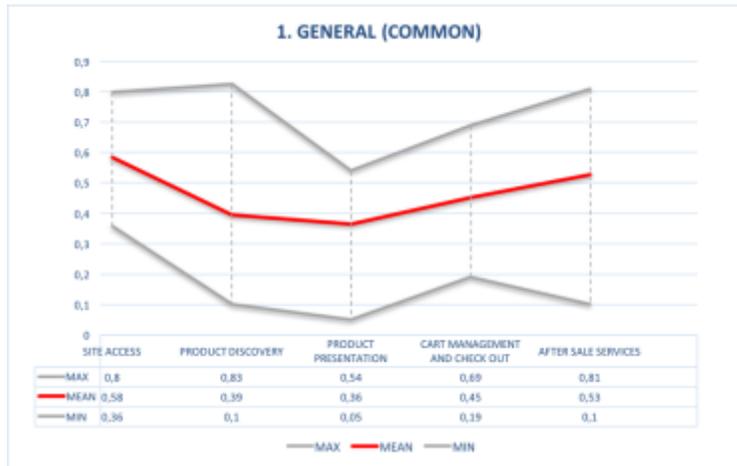
Figure 4: Analysis of the General trend of all the merchants, considering the common elements in the Browser channel

The research has taken into consideration all three channels where the actors have been able to developed their business: *Browser*, *Mobile Site* and *Mobile App*.

A results' comparison among them, has displayed that the *Browser* and the *Mobile Site* channels lie on the same trends and performances, while the *Mobile App* channels behaves in a more different way.
The fact that the first two, more traditional channels, performed almost identical results, could be linked to the fact that the adoption of the *Mobile Site* channel happened like a natural technological adaptation to the screen of devices used by the users, while the latter has produced new possibilities for the development and the implementation of features that can exploit all the potentiality of the new smart devices.

The directions for the exploitation of these three channels have taken different paths.
The *Browser* and the *Mobile Site* in fact, could provide a higher amount of information while the *Mobile App* could count on particular features fostering the interaction and the ease-of-use.

Along this analysis, the *Browser* holds the best results, considering the overall performances of the whole Customer Journey. The possible explanation of this result could be the seniority of this channel against the other two, that led it to be the most common platform for all the type of merchants.

On the other side, the *Mobile App* which generally could be seen as the most innovative one, in this study has highlighted the weakest performances among all the actors. The study, in fact, has considered at the same level the different phases, and the *Product Presentation* here, due to the nature of this channel, has scored faint scores.
This is due to the volume of information offered by the *App*, which is usually lower than the

amount offered by the *Browser* with the Desktop version of the web page.

Then, these results highlighted that the more new and innovative features developed and fostered by the particular use of the mobile devices, did not counterweigh the lack of info, which this channel suffers from.

Moreover, this channel has collected a lower number of merchants as you can see from the next graph.

This could be caused by the novelty of the channel (the last developed in the years) but also, it is influenced by the fact that the empirical research took into consideration international merchants that do not operate on the Italian territory and so, in the analysis of the *App* channel, it produced a further effect, as the information in some case were not available.
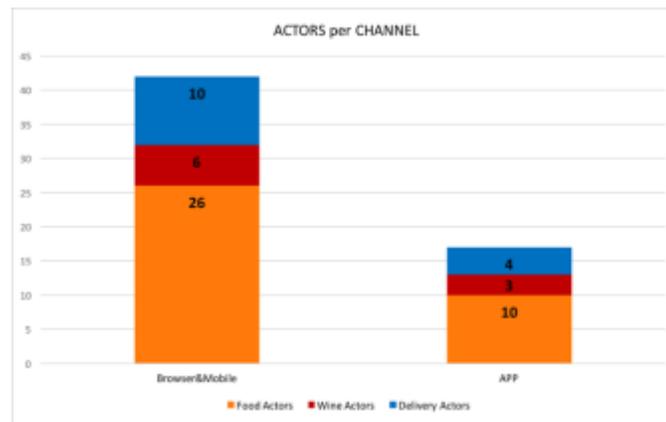
Figure 5: Number of actors analysed during the study in Browser/Mobile channel and in the App

Anyway, it is worth to say that, comparing them just on the Italian base, the number of active players that developed their own *App* has been really lower than the Browser's ones.

The immaturity of eFood merchants then, has been shown through this data; a trend that should be inevitably overthrown in the next years as Stein stated in his research (A. Stein, 2015) represents the actual and future way to strengthen the bond with the future customers.

With the Analysis of the *Mobile App* merchants, the effects expected were linked to the last phases of the CJ, as they represent "*added services*" whose development could be considered more fitted in this channel. Specifically, it actually happened, showing an increase of the 4th phase (*Cart Management & Check Out*) performance of +8,5%.

So, even though the overall results have been the weakest ones under the channels comparison, the only ones that benefit from this channel were the *Food Delivery* players.
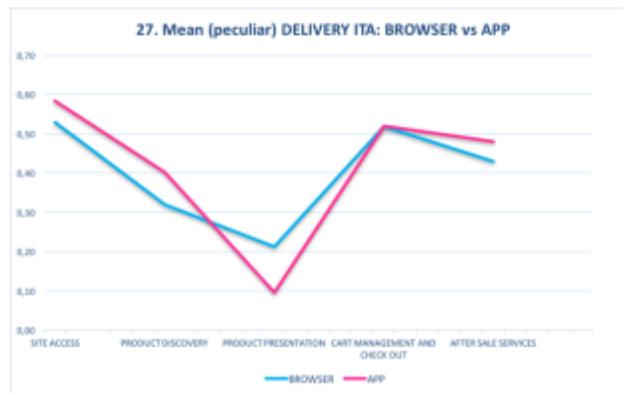
Figure 6: Channels comparison, Browser and App performances for the Delivery merchants

The performance of the *Food Delivery* actors in the *App* channel is essentially better than the Browser, not just in the last phases but also in the first two as it is possible to see from the graph above.

The fact that the *Food Delivery* actors are the more performant in the *App* channel, could be caused by the huge attention payed by this type of actors in the mobile world from the very first moment they launch their products.

It's true that the *Food Delivery* merchants, expressed better their value through the *App Channel*, more than the Food or Wine actors, but in any case, it was not sufficient to beat the other's results.

The comparison among all the type of merchants, underscored the superior performance of the *Food* and *Wine* merchants, where, the *Food*'s ones have shown the steadiest performance among all the phases in all the channels and also the better results.

They represent also the best case of balancing between visual and utility content. The Wine's ones also scored very good results in all the phases, but they seemed more volatile as they performed not very good in the 4th phase (*Cart Management & Check Out*) while they outperform in the last phase (*After sales*).

The 5th phase (After Sales) it's highly linked to returns management policies and the fact that the wine retailers demonstrated to be the best here, is associated to the circumstance that the beverage is the typology of products, among all the products analysed, that needed more attention under this aspect (the return management of fresh food and dishes from the restaurants is quite infrequent).

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Figure 7: Browser performances per products considered   Figure 8 : App performances per products considered
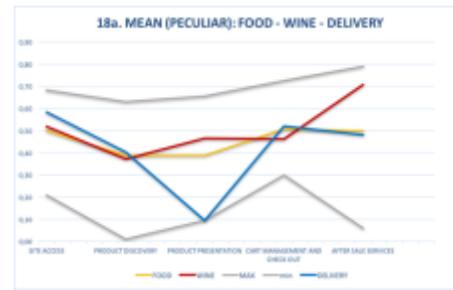
The results are shown here in the graphs above, that collect the *Browser* and the *App* performances, according to the different type of merchants. The *Mobile Site* results, are not displayed, as they represent very similar trends and results of the *Browser*'s ones.

As said previously, the weakest results in this research have been highlighted by the *Food Delivery* merchants, that have been considered operating in the Italian territory.
For sure, the results have been enfeebled by the lack of images, descriptions and supplementary information that led the central phase (*Product Presentation*) to score a result around 1/10 of the maximum achievable and let the *Food* and *Wine* actors to assume the most relevant roles here.
Their best performances are linked to the 1st and the 4th phase, which make sense with the focus of this sector, where they implemented new peculiar features as "*Search by Location*" and "*Restaurant Ratings*" in the *Site Access* and new services in the *Cart Management & Check Out* as the "*Time Delivery Window*".

So, in these last results, with the comparison of the typology of merchants, there has been also the introduction of the peculiar elements.
In the previous sentences, the *Food Delivery* peculiar elements have been presented in the 1st and 4th phases, while for the *Food* and *Wine* sectors the peculiar elements are concentrated in the first phases, with the introduction of "*Hints*" and "*Recipes*".
They have boosted the customers' curiosity and stimulated their interest. This is exactly what the *Food Delivery* merchants have not developed and then, it was the cause of the creation of that lacuna in those phases.

To confirm the results, the best practice of the empirical study, has been highlighted among the *Food* merchants with the performance of EATALY, an Italian food grocery actor that, after the establishment of its own international retails network, landed in the digital market with its own eShop, both in the *Browser* and in the mobile *App* context.

Finally, it is worth to say that through the study, it was confirmed that most innovative services introduced in the eFood market, belong to the leader markets of the sector as the USA.

From this market indeed, came the most particular service of *Food* and *Food Delivery* that gather services linked to the delivery of the singular ingredients of a specific recipes (ready-to-cook products) presented by their websites, or the delivery of dishes coming from special chef's menu instead of the most common restaurants founded on the traditional *Food Delivery* partners. Additionally, from this market come the principal marketplaces that have already started the introduction of the food products among the basket of item sold, and for sure will continue this path threatening the more *food-focus* actors.

Speaking about Italy, even if it is evaluated as not the most important market in the eCommerce context, it demonstrates a lot of good *eFood* merchants, a fact also underlined by the Italian grocery actor EATALY that holds the best practice.

The Italian context is still late against other markets, but thanks to the varied and well-known food and beverage products, it could increase its eCommerce performance in the next future thanks to the more structured export digital platforms.

As a matter of fact, the wines already opened the trade at global level with their introduction in the marketplace offers, and so, it could inspire the food sectors developing better solutions.

1. INTRODUCTION

1.1 CONTEXT

The eCommerce nowadays is a phenomenon that cannot be avoided by firms all around the world when considering the effectiveness of their business. The prompt diffusion of internet took just few a years to reach its own critical mass since the launch in 1995 and this "paradigm shift", concerning the customer's behaviour changes and the of doing business for the firms, happened in such short period.

In the past, the website was usually considered as a secondary channel to exploit, in order to add information and to the customer information touch point. Lately, the direct-to-consumer channels has become the rule in most industries with the development of the concept of "omni-channel" commerce world. Some of the "old" firms, which have not been able to rapidly change their structure and their approach, have been overtaken by new start-ups that shaped their business on the new needs of the "Netizen" customers (i.e. internet natives) (Choi, 2014), who expect companies to generate a continuous deeper customer insight using the new digital data path and new technologies. The last decade has experienced an unprecedented speed of change in the implementation of marketing digitalization too, concerning an immeasurable amount of consumption data; and empowered consumers who can influence a brand in the marketplace (S. Quinton, 2016).

The revolution in information and communication technology (ICT) changed the way people conduct business today. Consumers have a lot of information at their disposal on anything they wish to purchase. eCommerce as a market place, which represents a place where people can purchase items, order online and pay online, finds its common definition. The spatial and temporal concept of commercial interchanges is evolving: the place is assuming a worthless value, due to interconnection on the network making geographical distances disappear, and where time itself is transformed into a changing object according to its uses (A. Bodini, 2011).

Once personal computers were established in the workplace, consumers became familiar with the use of the internet for sending and receiving emails, then for searching for information (S. Quinton, 2016). The internet has evolved as the primary source of information for billions of people. In the last five years the user numbers doubled worldwide, and for over 2 billion people the internet is now a part of their lifestyle (Global Report, 2010). Online shopping and eCommerce changed the face of the retail environment, impacting industries and markets in a variety of ways (Klaus P. , 2013).

Consumers all over the world are constantly seeking to save time and the globalization has caused a homogenization of consumption patterns in such a way that, in some markets, it is possible to see very similar consumption habits in various regions of the planet (F. Quereido-Silva, 2015) and as consumers increasingly incorporated the internet into their lives,

businesses had to consider whether to mirror the spaces that those consumers now inhabited (S. Quinton, 2016).

The last "paradigm shift" which has taken place in the last decade and it is referred to the mobile retailing and it is strictly linked to consumer mobile purchase behaviour anytime and anywhere as also in the marketing strategies. In fact, the new technologies we have, have changed both the ways consumers access and consume information, and the way firms and organizations reach clients and deliver their services (E. Pantano, 2015). The mobile Internet has unique strengths because users can connect to it wherever and whenever they want (J. Pelet, 2014). In this context, ubiquitous retailing is acquiring importance by involving ubiquitous access to information. Moreover, while the traditional point of sale is limited to the store location, spatial dimensions and opening hours, the new stores are not related to a specific location but distributed, in terms of access, anytime and anywhere within an area enriched with the above mentioned technologies. Hence, the consumer is always ready to buy and the retailer is always ready to sell (E. Pantano, 2015).

From Net Retail, Human Highway per Netcomm, September 2015, we know that the "mobile effect" on the eConsumers is particularly strong in Italy, where it changes the purchasing process more than in other countries. On the 19 million smartphone users base, the 72% look, in traditional stores, at products that they have already seen on internet (INFO-COMMERCE) and 45% seek information about products while they are in the store through this channel (SHOW-ROOMING) (Figure1).

Figure 9: Info Commerce and Show-Rooming trends, Netcomm2015

As the current mobile technologies allow a separation of the moment of the purchase from the moment of effective consumption, when consumers buy anywhere (where equipped with an internet connection) and collect at home or at the store (pick-up boutique or collection point), consumers' experience might change over time due to the introduction of multiple mobile channels, which modify their shopping behaviour in terms of search, purchase, consumption and after-sales behaviour (E. Pantano, 2015).

Data that the marketers should take into account, are linked to the influence and the diffusion

of the social media with the subsequent increasing internet access through mobile devices, whether via browsers or apps. A study by Adobe (Adobe, 2013) among mobile users in the USA, Canada, UK, France and Germany found out that most people had accessed to social networks using a mobile device, ranging from 94 per cent for those 18-29 years of age to 75 per cent of those 50-64 years of age. The context is continuously changing and what is interesting is the consumers' attitude, as they are less shy about providing their views and opinions, and they will abandon more easily any company that does not serve their needs or is perceived as not providing value. Blogs, micro-blogs in the form of Twitter, social networks such as Facebook and Linked-In, review-based communities such as Tripadvisor, are all expressions of a desire to share information and experiences (S. Quinton, 2016). M-commerce has not surpassed eCommerce yet, but the rapid growth of mobile telephony has fuelled the expansion of the mobile Internet as a foundation for mobile commerce (J. Pelet, 2014).

In Italy, the sales through smartphones reach 3,3 billion euros thanks to a growth of +63% in the 2016 (Osservatorio, 2016).
As the way of shopping has partially changed globally, it has been sustained by great efforts in the development of new services that go along with the eCommerce path. Besides the development of platforms, user interfaces and delivery methods used, a consistent change also happened in the payment method. In the last 3 years the cash payment for the eChannel has halve its effect, giving space to the market leader PayPal (37%) and enhancing the use of debt/credit card on the websites (24% and 21%) (Osservatorio, 2016).

Today the internet users are represented by 2.8 billion people which 1.3 billion people are eShoppers, with a 2016 sales' forecasts for the eCommerce of $ 2.640 billion (Europe, 2016), with China, USA, UK, Japan and France occupy the leading positions of the eCommerce market (Europe, 2016). The internet access through the telecommunication network, the economic structure and the high digital culture developed in the last years, helped Asia leading in the growth rate ranking with a +28% in the last year, against the +13% of USA and Europe.

In the online environment, however, consumers classify products by considering the risk and uncertainty due to the inherent limitations of eBusinesses. A study by Grewal (Grewal D, 2004)states that some categories, such as computer products, books, and music CDs, have strong consumer acceptance in the online environment, and a few show profit, while other categories, such as home grocery delivery, have lower acceptance. In this context products that have limitations in delivering sensory input through the Web, such as perishable grocery goods, clothes, and shoes (JM., 2000), have less appeal to online customers than do other products, such as books and computers (Cho, 2011). According to this, we can see as a representative image on the distribution of the overall eCommerce market, the penetration of the electronic market in US. This is represented by the Online Travel at 42%, the consumer goods for 36%, Fashion at 19% leaving just marginal space to the Home Living (7%) and Food-Grocery (<3%).

For what concerns the European market, although a constant growth rate has been registered in the last years, it seems that logistics, regulation and the impact of the duties are still the biggest problem impacting a complete maturation of the European eCommerce market. About numbers, researches highlighted that the number of eShopper is around 296 million and the sales forecasts are expected to be € 510 billion in 2016 (Europe, 2016). In this context, a big slice of the pie is represented by the marketplace and pure eRetailer which have been, and they'll be, the key factors for the evolution of the future eCommerce.

A more detailed focus on our country, shows that the online sales will reach 20 billion € in 2016, with a growth of +18% on the previous year (Osservatorio, 2016), with a consumers doubling in the last 5 years and then, optimistic growth is expected by the end of 2016 (Retail, 2016). The sales in B2C channel in Italy is represented for more than one third by the marketplace. The most mature markets, linked to products, in the Italian eCommerce sectors are fashion and electronic with € 400 million sales each, with Dot.com, private sales websites and multichannel retailers that lead the Italian in both sectors (Osservatorio, 2016). The Food & Grocery sector, on the other hand, it is not among the most developed but it represents big margins of growth with a high level of potentiality. In the last year, it has grown by +30% and it ranks itself as the third most grown sector in 2016 (Osservatorio, 2016).

In the adaptation of the new context and fulfilment of the new customer needs, Italian firms are seen as one of the most undeveloped in the European context and it could be associated to the lack of country digital culture and a premature mindset of the manager concerning the firms' digitalization. On the other hand, UK and France demonstrate themselves to be mature eCommerce markets with big consciousness of the opportunities, showing a good adaptation of the firms, as the 10% have already reached their digital maturity (Netcomm, 2016). According to the last data collected by Osservatori.net (Osservatorio, 2016), the smartphone channel is increasing in relevance all around the world, changing the shape of marketing, customization and interactivity in the eCommerce market as the behaviours of the users have changed. In Italy the 17% of eCommerce activities came from smartphones, having in the last year a convincing growth of +60%.

For firms with an internet presence, and which now desire to sell directly to consumers, a transactional website was such a piece of kit. A critical element within that kit is to understand of what is important to a potential customer. The opportunity for mass customization of products and the quantity of information available via the internet altered the type and scope of relationships possible between the consumer and organization or brand (S. Quinton, 2016). The actual trend of the last years, shows us how the digital firms step from being just eRetailer to adopt the concept of being marketplace, with a steady introduction of new technology and solutions as the adoption of subscription (well known in the US food market) and the strong development of the social commerce, from reviews to payment methods.

Back to the several sectors developed in the eCommerce context, the least developed (as showed before, Food&Grocery), represents the new frontier of the future eCommerce

(Netcomm, 2016). As a matter of fact, in a future perspective the eCommerce may represent a competitive strategy to make enterprises of the agro-food sector more visible to consumers, if usability is adequately taken into account (A. Bodini, 2011). Nowadays, eCommerce applications are becoming increasingly popular in the hospitality & restaurant industry (T. Castleman, 2002) and at the same time food-buying over the internet is a growing trend in many countries such as the UK (Grunert, 2004), Brazil (Paulino, 2012), India (Naresh, 2015) and others, as consumers choose online delivery because it offers greater comfort, speed and accuracy (F. Quereido-Silva, 2015). If we look at the Italian market, we can see that the Food&Beverage sector right now, represents only the 3% of the overall Italian sales through the electronic channel (U. Bertelè, 2015). While the data show that it is the last developed country in this market, it is not the weakest one. The growth pace is strong and continuous. The penetration rate is still very low (0,35%) but in the current year, it shows a growth of +30% on the 2015 data placing itself as third sector for annual growth.

In particular, wine was one of the first products to receive attention from Internet-only retailers (Dot.com) (G. Bressalles, 2013), it leads the export in the Italian eCommerce market, but it still faces some obstacles due to the reluctance to change the mentality of the producers (MC. Mason, 2015). The online wine market is expanding at an annual growth rate of around 30% (G. Bressalles, 2013). Following the pattern of other consumer goods, the sale of wine on the Internet is experiencing growing success throughout the world (G. Bressalles, 2013).

In the specific context of the food industry, it seems that food itself may provide no particular attraction. While the commoditization of experience is not new, it is more commonly the basis for value creation than before as the website can offer more features than any other form of print media. An example is that a website can include significantly more information about the restaurant and its food, such as by providing an online menu, notification of special events and a special section for recipes (T. Castleman, 2002). As a consequence, online-based businesses have started to focus their efforts improving the quality of the online services instead of just pure information provision, developing the idea of electronic service and online customer experiences, as researchers, state that customer experience plays a significant role in shaping positive attitudes and influencing customer behaviour (Klaus P. , 2013).

The website is part of the connection between a company and its customers so it should reflect the quality efforts that are in place across the company. The companies therefore wish to offer quality interfaces to their customers in order to capture the attention of the people who know very little about the company and are interested in it (MC. Mason, 2015). As a matter of facts, it's not enough for the companies just to approach the digital channel using a great website or a mobile app, but what the customer is aware of, is the whole experience that arise from a seamless experience that touches and designs all the Front-End solutions for the customer. In these terms, we are talking about Customer Experience which affects, not just the digital aspects, but all the ways a customer can reach a company (catalogues, websites, social media, stores, mobile solutions) that represent all the possible touch points

that a customer could have with the company. The aims of the Customer Experience (CE) are to: attract new eShoppers through its attractiveness and to make the eCommerce becoming a mainstream in the way of making business. There are essentially three main parts that compose the Customer Experience: Marketing, Customer Journey and the last part is linked to the Logistics.

Parasuraman, A., Zeithaml, V.A, and Malhotra, A. (Parasuraman, 2005)in 2005 started talking about electronic service quality, as "the extent to which a web site facilitates efficient and effective shopping, purchasing, and delivery of products and services". Later, Bressalles (G. Bressalles, 2013), introduced the concept of online customer experience (OCE), defined as '*a psychological state, manifested as a subjective response to the eRetailers website'*, while Klaus P. (Klaus P. , 2013)defines online customer service experience (OCSE), as '*the customers overall mental perception of their interaction with the online service provider and other customers expressed in its dimensions of functionality and psychological factors'*. Others, state that customer experience is not designed, rather it is co-created through (MC. Mason, 2015) customer interactions with the several service elements (Vargo, 2006) and to enable the desired experience, service designers must assemble a coherent set of elements, or clues, along the customer journey (Berry, 2002). It also could be seen as the internal and subjective response, customers have to any contact (direct or indirect) with a company (J. Teixeira, 2012). The important message that emerges from these studies, is the new direction that the enterprises have taken towards the development of effective and valuable customer experiences able to overcome the lack of the physical contact between the final customer and the products.
It is also confirmed by a recent study by Accenture, that the 49% of consumers believe that the best thing that retailers can do to improve the shopping experience is to better integrate in-store, online and mobile shopping channels (Accenture, 2012).
As a consequence, the path to realize a valuable and reliable OCE in the B2c eCommerce is long and several impediments have to be overcome.

The most known framework used to model the several stages a firm has to pass by, is based on the Customer Journey Map composed by the five main phases the consumer goes through while purchasing on a B2c eCommerce website: landing, product identification, product presentation, cart, order completion and payment (A. Perego, 2009).
The Customer Journey Map is a tool used to track and analyse the user experience and assess the quality of a process or a service. Developed in the CRM sector, it is a customer-oriented strategic tool useful to analyse and understand an experience from the user point of view, disclosing issues and hurdles as well as opportunities for improvement and innovation (Buttle, 2003) It is particularly helpful and effective also to examine complex experiences and processes that connect different touch points, channels and systems (Brugnoli, 2009). Moreover, in the latest years it is used as a design tool by interaction and service designers. According to the description given by Adam Richardson, the Customer Journey Map is a linear, time-based representation of the main stages that a customer goes through in interacting with a company or a service (Richardson, 2010) (A. Perego, 2009).

In other terms, the Customer Journey Map helps the companies to track down the different phases the customer passes through, from the awareness to discovery, from interest to action (buy), passing by digital and non-digital touch points. It includes marketing, sales, commerce and customer service activities to define a consistent path where every customer can be comfortable with. There is always the necessity to adapt and provide every time the right amount of content, interactions, personalized experiences and removing unnecessary barriers for a persuasive experience.

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2. THE LITERATURE ANALYSIS

2.1 INTRODUCTION

In the first part this thesis wants to analyse the literature relating to the development of the eCommerce in the food industry, the main factors to take into account in order to guarantee a fully satisfactory customer journey and the further development of the online customer experience in the B2c market.
In particular, the aim is to understand which topics, related to these fields, have been studied by the previous researches and where there is still a lack of focus on. It provides an insight of the customer journey with the definitions of the various phases and how they could be segmented, understanding which type of website features (Visual Content vs. Functionalities) affect mostly, the purchase behaviour and can create a satisfactory online customer experience.

Other topics also have been taken into account in order to have an exhaustive picture of the eCommerce situation, evaluating the weight of the m-commerce nowadays, the use of social network as marketing tool, the multichannel solutions and the most important innovations developed by the principal online merchants. Actually, this review wants to focus mainly on the food industry, taking in consideration the international markets.

2.2 METHODOLOGY

The research of the papers through the use of several library databases, as: Scopus, Elsevier, Emerald Insight; with the key words: eCommerce, customer experience, customer journey, food, wine, agro-food, m-commerce, online customer experience, product presentation, delivery, web design, etc.

Through this method, 32 documents (Table 1) published in the last 15 years among scientific papers, white papers, journal articles and researches have been taken from the principal management journals in the fields (Journal of Retailing and Consumer Research, Journal of Service Management, International Journal of Research in Marketing, Journal of Service Marketing, Journal of Internet Banking and Commerce, International Journal of Wine Business Research, Journal of Food Products Marketing, British Food Journal, International Journal of Management Review, Journal of Business Research, Journal of Retailing, Journal of Food Engineering) and then collected and classified according to their characteristics (i.e. year, source, topic, focus, market, etc.).

Among 23 Scientific papers, 5 Academic researches, 2 Journal articles and 2 White papers the addressed topics have been: Online Customer Experience, Mapping Customer Journey, Usability of websites, eCommerce in food and wine industry, Social marketing, Multichannel retailing, features that mainly impact on the customer behaviour.

After the analysis of the content of each document, the papers have been classified with the use of an Excel file, highlighting the types of study made and the main topics discussed (Figure 10). In this way it has been more easy the comparison of the topics analysed and assembly the final document of the literature analysis.

Figure 10: Screenshot of the Excel file for the Literature analysis, showing the data collection

N°	Title	Source	Year	Author	Analyzed Market	Paper Typology	Focus
1	Re-examine Online Customer Experience to include purchase frequency and perceived risk	Elsevier	2015	J. Martin, G. Mortimer, L. Andrews	Australia	Scientific	Customer Journey
2	Customer experience modelling: from customer experience to service design	Emeral Insight	2012	J. Teixeira, L. Patricio, N. J. Nunes, L. Nobrega, R. P. Fisk, L. Constantine	Generic	Scientific	Offline Customer Experience
3	Mapping the customer journey: lessons learned from graph-based online attribution modelling	Elsevier	2014	E. Anderl, I. Becker, F. von Wangenheim, J. H. Schumann	Generic	Scientific	Customer Journey
4	Electronic commerce readiness in the food industry: development and application of an assessment tool	informatique-agricole.org	2005	L. Theuvsen	Germany	Research (Data Gathering)	Ecommerce
5	eCommerce and the competitiveness of small enterprises: A study of the restaurant industry	Deakin University	2002	T. Castleman, C. Ye-Phern Chin	Australia	Research (Data Gathering)	Ecommerce
6	The case of Amazon.com: towards a conceptual framework of online customer service experience (OCSE) using the emerging consensus technique (ECT)	Emeral Insight	2013	P. Klaus	Usa, UK, Sweden	Scientific	Customer Journey
7	The Wine Sector in the Digital Era: An Empirical Evaluation of E-quality Opportunities (research and reviews)	Journal of internet banking and commerce	2015	MC. Mason, L. Gos, A. Moretti	Italy	Scientific	Ecommerce
8	The eCommerce Customer Journey: A Model to Assess and Compare the User Experience of the eCommerce Websites	Journal of internet banking and commerce	2009	A. Perego, G. Brugnoli, R. Mangiaracina	Generic	Scientific	Customer Journey
9	Smartphones and wine consumers: a study of Gen-Y	Emeral Insight	2014	J. Pelet, B. Lecat	Generic	Scientific	Ecommerce
10	Competitive factors of the Agro-Food E-commerce	Routledge	2011	A. Bodini, R. Zanoli	Italy	Scientific	Ecommerce
11	Intentions to purchase food through the internet: developing and testing a model	Emeral Insight	2015	F. Quereido-Silva, O. Freire, D. Lima-Filho, M. Brandao, G. Isabella, L. Moreira	Brazil	Scientific	Ecommerce

Table 1: Recap Table of the papers analysed in the Literature Analysis
(to be continued)

#	Title	Publisher	Year	Author	Country	Type	Topic
12	The Digital Journey: Reflected learnings and emerging challenges	International Journal of Management reviews	2016	S. Quinton, L. Simkin	Generic	Article	Ecommerce
13	A Typology of Online Consumers of Wine Websites based on Electronic service quality dimensions	IEEE computer society	2008	G. Bressalles, F. Durrieu	Generic	Research (Data Gathering)	Ecommerce
14	Towards the identification of customer experience touch points elements	Elsevier	2015	A. Stein, B. Ramaseshan	Australia	Scientific	Customer Journey
15	Analyzing online customer dissatisfaction toward persihable goods	Elsevier	2011	Yoon C. Cho	Generic	Scientific	Ecommerce (Food)
16	Using customer journey to road test and refine the business model	Emeral Insight	2013	D.W. Norton, B.J. Pine II	Generic	Article	Customer Journey
17	Consumers' willingness to buy food through the internet: A review of the literature and model for future search	Emeral Insight	2005	K.G. Grunert, K. Ramus	Generic	Scientific	Ecommerce (Food)
18	Using social media in the wine business: An exploratory study from Germany	Emeral Insight	2013	G. Szolnoki, D. Taits, M. Nagel, A. Fortunato	Germany	Scientific	Wine
19	Research on E-commerce Model of Food Enterprises	IEEE computer society	2010	W. Zhang	China	Research	Ecommerce (Food)
20	The complete customer journey: avoiding technology and business barriers to measu total value of the media	Emeral Insight	2010	C. Skinner	Generic	Article	Customer Journey
21	Online customer experience in e-Retailing: An empirical model of Antecedents ar Outcomes	Elsevier	2012	Susan Rose, Moira Clark, Philip Samou Neil Hair	USA and Europe	Scientific	Ecommerce
22	Ecommerce: una straordinaria opportunità per la trasformazione digitale delle aziende e per il sistema paese	Netcomm Forum	2016	Roberto Liscia	Generic	White paper	Ecommerce

(to be continued)

#	Title	Publisher	Year	Authors	Country	Type	Category
23	The effect of web interface features on consumer online purchase intentions	Elsevier	2008	A.V. Hausman, J.S. Siekpe	Generic	Scientific	Customer Journey
24	The effects of online product presentation on consumer responses: A mental image perspective	Elsevier	2014	J. Yoo, M.Kim	USA	Scientific	Customer Journey
25	The fluent online shopping experience	Elsevier	2014	J. Mosteller, N.Donthu, S. Eroglu	Generic	Scientific	Customer Journey
26	Fresh food sustainable distribution: cost, delivery time and carbon footprint three objective optimization	Elsevier	2015	M. Bortolini, M.Ffaccio, E. Ferrari, M. Garmberi, F.Piatti	Generic	Scientific	Ecommerce (Food)
27	Evolving the online customer experience … is there a role for online customer support?	Elsevier	2015	G. McLean, A.Wilson	Generic	Scientific	Customer Journey
28	The effect of mobile retailing on consumers' purchasing experiences: A dynamic perspective	Elsevier	2015	E. Pantano, C. Priporas	Italy	Scientific	Ecommerce
29	Patterns for Business-To-Consumer E-Commerce Applications	International Journal of Software Engineering & Applications (IJSEA)	2011	X. Yuan, E.B. Fernandez	Generic	Scientific	Ecommerce
30	The moderating role of information load on online product presentation	Elsevier	2015	M. Li, K. Wei, G.K. Tayi, C. Tan	Generic	Scientific	Customer Journey
31	Factors influencing Internet shopping value and customer repurchase intention	Elsevier	2012	C. Kim, R.D. Galliers, N. Shin, J. Ryoo, J. Kim	South Korea	Scientific	Ecommerce
32	Osservatorio eCommerce B2c Social? Mobile? Multi canalità? Sì, ma sono servizio e convenienza la linfa dell'eCommerce in Italia	Osservatori.net	2015	U. Bertelè, A. Perego, R. Balocco, M. Corso, A. Rangone, R. Liscia, R. Mangiaracina	Generic	White paper	Ecommerce

As we said, most of them are scientific papers, based on empirical studies (e.g. surveys, interviews) or discussions of proposed frameworks. Regarding the latter ones, clear examples have been made concerning the model of Online Customer Experience explaining the difference between Cognitive Experiential State and Affective Experiential State and how they interact (Susan Rose, 2012), (J. Martin, 2015) and the factors affecting the interface's usability (A.V. Hausman, 2008).

Few papers used the approach of interview to catch the influencing factors linked to the technological features of the websites and the creation of the right atmosphere for the users (A. Stein, 2015)but also to investigate the development and the use of the mobile APP in the purchasing process (E. Pantano, 2015).

One of the most used tool for the previous researches has been the linked to the surveys method using both specialists of the sector (Liscia, 2012) and common internet users (J. Pelet, 2014), (A. Bodini, 2011), (C. Kim, 2012). (J. Pelet, 2014) focused on the world of wine, making a survey through Generation Y (users born between 80's and middle 90's) linked to the benefits and boundaries of the innovative m-commerce. A. Bodini (A. Bodini, 2011), has made a study concerning three Italian wine eShop (Peck, Spacewine and Wineshop) making a comparison through the websites features understanding how the users react in front different layouts. C. Kim(C. Kim, 2012), instead, has made a survey linked to the South Korean eCommerce environment, with the aim to find which motivations move the customers from the traditional brick and mortar (B&M) to the eChannel.

Just few of the papers analysed, used the simulation tool, and one of them is A. Bodini paper (A. Bodini, 2011), already mentioned previously. As a matter of fact, it simulated a purchasing process using several customers in the three Italian wine eShop (Peck, Spacewine and Wineshop) and then collected the users' impressions through a survey. Another example of simulation has been given by (G. McLean, 2015) that examines sensations the customers have, linked to the presence of the customer support in the eShops.

In the Figure 11, it is represented a recapitulatory scheme of the papers analysed with the number of documents focused on the different phases and the markets analysed by the papers. The most analysed markets in the papers have been respectively Italy, Australia, Germany, USA, Brazil, South Korea, Sweden and UK. Concerning Italy, studied made in this market approached Landing, Buying Decision and Order Management phases.
Among these 32 papers analysed, 3 touched the "Landing" phase, 5 the "Order Management" phase, 7 the "Product Introduction's" one, while the "Buying Decision" Process and the studies around the factors affecting it have been revealed to be the most commonly used focus among the Customer Journey phases with 13 papers. If the "Buying Decision" Process has been presented as the most common topic analysed, on the other hand we have the "After Sale Service" topic that scored 0 papers on its side, maybe considered as less significant during a customer journey. Other 13 papers faced the customer journey analysis in a more generic way. As shown in the Figure 11, the "Generic" and the "Buying Decision" are the most

interesting ones and here, it's possible to see how the "Buying Decision" has been analysed in-depth for several markets, more than a Generic focus. Even though it could be already highlighted by the number of papers (13), it provides an additional proof of how the studies all around the world are worried about understanding the users' drivers in the purchasing process.

According to the data collected by Osservatorio.net in 2016, the conversation rate on eCommerce platforms is around 1,2% and it is mostly caused by the "bounce rate" (which happens during the "Research phase") and by the "engaged customer rate" (which occurs in the "Product presentation"), so it seems that on these two, more attention and effort should be played. Moreover, another source that affects the conversation rate is the "cart abandonment", but in this case it seems that it has no great relevance in the food sector, due to the nature of the purchasing necessity.
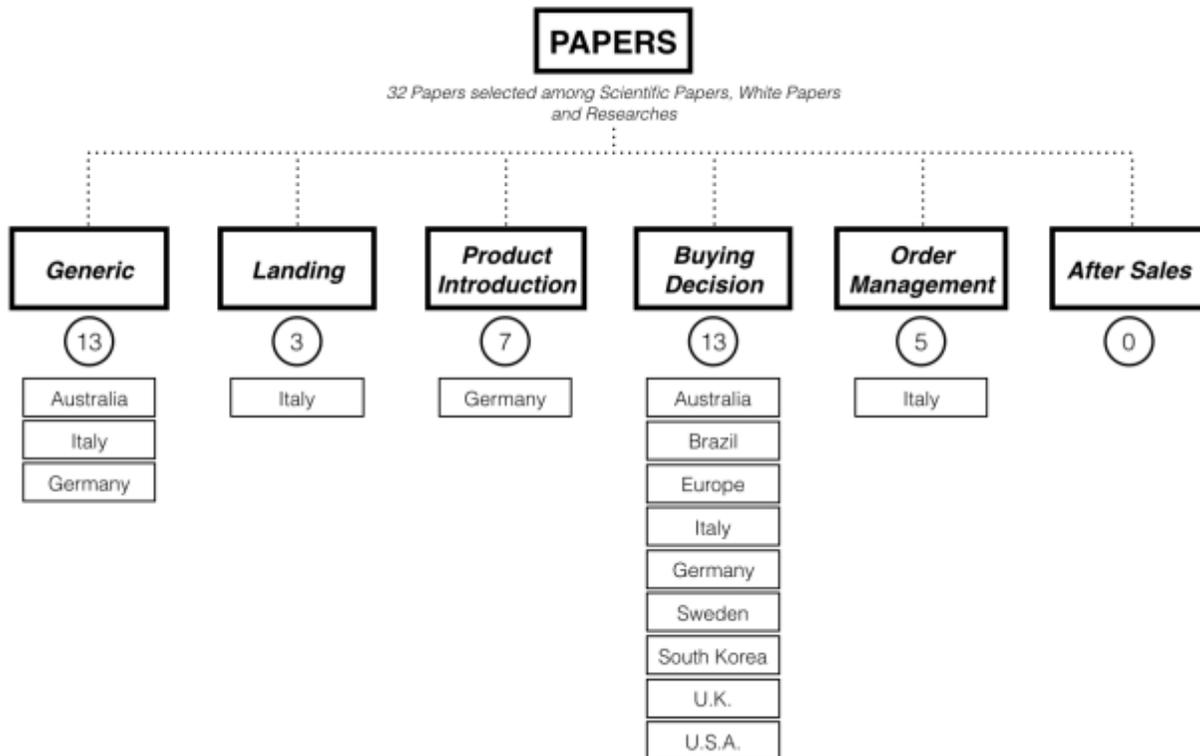

Figure 11: Scheme of the papers analysed according to Focuses and Markets

2.3 FOUNDINGS

In this paragraph the thesis wants to make a chronological screening of the subjects analysed through the several papers taken in consideration, that lie on a 15 years' time span. Starting with a view on the development of eCommerce in Food sector, it will be presented then the literature referred to the definitions of Customer Journey and Online Customer Experience, heading at the end to the studies linked to the description of the multichannel development importance and the most relevant website's features in the social environment.

One of the first issue investigated was the level of acceptance and the development of eCommerce and online channel in the food sector, especially in the restaurant business. T. Castleman (T. Castleman, 2002) introduces the idea that at the beginning of the 21st century, the strategic applications of eCommerce involved fields from the innovative marketing, to the construction of better CRM.

A research on the Restaurant sector Castleman (T. Castleman, 2002) shows us how, as the first actors in the food sector, restaurants introduces internet in their business to sell signature merchandise, to promote online menu and to buy supplies online (B2B) and in 2002 *"one of the most popular ECommerce application used by US restaurants and hotels"* was the Point of Sales system (T. Castleman, 2002). The first reason that leads the adaption of these type of systems, was the accuracy with which the manager could measure and manage the guests at their tables. Moreover, it starts to be common to have an own website to show the menu and to make table reservations.

From the respondents, issues linked to eCommerce in restaurants and in general to SMEs have been underlined, concerning the operational efficiency and the lack of business advantages linked to this type of activities, which results to be the principal reason why they answered negatively to the survey (T. Castleman, 2002).

K.G. Grunert (K.G. Grunert, 2005), a couple of years later, highlighted how the people' lifestyles started changing towards a more wired ones and, with them, also their shopping habits. It started to think about the potential of the eCommerce for the food (groceries) and beverage.

A distinction has been made between traditional trade and eCommerce, according to three elements: product, agent and process.
In the traditional perspective the trade uses a physical product, a physical agent and a physical process, but when just one of them involves the use of internet, then we can talk of eCommerce and here it starts a debate on how the robust customer experience of brick-and-mortar shopping could be substituted by virtual channel. A debate between scholars took place, on one hand the ones convinced that the traditional channel will dominate also in the future for food, as internet doesn't offer Economies of Scales to the marketer and on the other hand, the ease of use of a possible home delivery service that is considered more than

relevant in the sector.

The environment and the perceived consumer benefits have been considered as the main factors conditioning the possible eCommerce development in the sector, with perceived control dominating the users' intention to buy.

Two were the main issues arisen from Grunert (K.G. Grunert, 2005): the need to decrease the perceived risk of leaking personal and financial information, and the need to build tailored services for the eUsers. Website's features development should be linked according to the different type of users and to what they are looking for, as products comparing for the one searching for specific products, safe transaction systems for whom has the willingness to purchase an item, and development of reliable return polices for users who has some post-purchase issues.

Nevertheless, it was highlighted that the most attractive sector for the development of the eCommerce in those years was the beverage, with a particular attention to the wine business. In this context the study of Theuvsen (Theuvsen, 2005)presents a research made in Germany that wants to reveal the eCommerce readiness of breweries in its territory that, with a growing pressure from multinational breweries and the emergence of more competitive aggressive strategies, has to redesign their strategies.

The results reveal that the readiness among the same sector was very diverse, where some were actively using internet, other didn't even have a home page, with the overall result that online sales were not significant for them. With a survey according to the Bauer and Grether's (2002) 5C model (content, challenge, communication, configuration and convenience) for usability measure, the paper explains that the best developed aspect for the breweries' web presence at that time, was communication, with just telephone numbers and contacts uploaded on the webpages and nothing more.

As stated previously, wine already attracted the greatest attention of the most in the eCommerce sector since the first years of the 00's and the study of Bressalles (G. Bressalles, 2013) started to define which factors influence the purchase intention of web users in this sector.

The main factors are:

- Quality and quantity of the information about products;

- Ease of use, navigability of the websites;

- Web design, visual and aesthetic elements;

- Reliability of the websites;

- Security/privacy concern;

PROS	CONS
• Reducing costs, no need for store rent and management cost is low;	• Conflicts with traditional shopping habits;
• Convenience, removing all spatial distance barriers for consumers and enables product comparison among several merchants;	• Reduce the fun/ experience of purchasing food;
• High efficiency: saving time of journey and the waiting time for processing for customers;	• Difficult to accommodate and manage the diversity of food;

Table 2: Table of Pros and Cons of the introduction of eCommerce channel

As Gehrt & Yan (2004) stated that customer attitudes and behaviour differ among those retail formats because of important differences such as availability of product information, ability to compare products, degree of human intermediation, access, speed of delivery, and amount of shopping time required, also Bressalles (G. Bressalles, 2013) through these main factors, they classified five type of consumers towards whom the merchants' efforts should be addressed in order to develop the best customer experience able to increase the online purchasing and the conversion rate.

The first group was the "secure seekers", looking for information and contacts in the possible case of problems, then there were the "opportunists" that use the online channel just to find a good bargain. The third group contains the "novice", that are just attracted by the aesthetic features of a website, while the forth one, called "customer service seeker", is composed by users that cannot find what they want and ask always for customer support. The last group is made by "browsers" that just look for some information.

Another contribution comes from a research of Zhang (Zhang, 2010) which has taken place in China in 2010, explaining the difficulties that food enterprises have in approaching the eCommerce, especially for the huge variety of food present in China. The paper indicates the need of integrating eCommerce for food enterprises and points out the advantages and disadvantages of facing the eBusiness (Table 2). Furthermore, it suggests which are the needs for the flawless development of a consistent business in the food eCommerce, as the establishment of food distribution system with the nature of systematization, specialization and low costs, protects the authenticity of online advertising and standardizes eCommerce market to promote its development, it changes the shopping concept of the consumers and Online safe guarantee system.

Another opinion is given by Cho (Cho, 2011), that wants to underline how the online grocery has received less attention due to the perishable nature of its products that experienced difficulties in delivery and management of goods of such a type, but at the same time

expressed hope for this sector.

As a matter of facts, it stated that even with such perceived risk and uncertainty, online grocery markets may gradually grow, due to various potential reasons, such as changes in customer adoption of innovations, development of eBusiness, or changes in societal structure, as said before (K.G. Grunert, 2005).

In 2011 again Cho (Cho, 2011), claimed that the only way for eBusinesses to success, is the maximization of expectations of customized services by emphasizing higher level of interactivity and it introduces in this field, the investigation of the *"impact of virtualization and telepresence (i.e., customers cannot try, see, touch the product via online due to without physical presence)"* which is considered the biggest limitation of the eBusinesses, especially in the perishable good market. Moreover, it explored the relationships among expectation, perceived risk of dissatisfaction, regret, and reconstructed expectations and it suggested how critical is the eCommerce Customer Relationship Management (eCCRM) as a remedy of customer dissatisfaction.

Back to our days, the last scientific paper, focused on the eCommerce acceptance of the wine industry (MC. Mason, 2015), introduced also the concept of the relevance of eService Quality (e-SQ) as measuring and monitoring quality and service in organizations has become fundamental to improve the performances of online businesses. It highlighted the differences between EService and the traditional service under three aspects:

1) Absence of sales staff (no interaction with the customers);

2) Absence of traditional tangible aspect;

3) Self-service customers and in-service;

In the paper, eService Quality is presented as strictly related to behaviours such as word-of-mouth (WOM), recommendation behaviours, site revisitation and purchase intentions and, especially in this context, WOM plays a key role because customers are continuously seeking the advice from other peers who have experienced the same service.

Whereas in Bressalles's study (G. Bressalles, 2013), we have seen five factors influencing the purchasing decision, now according to MC. Manson research (MC. Mason, 2015), similar factors are presented as the main pillars of the quality of eService and they are Usability, Design, Speed, Information, Contact, Navigability and Content.

The Usability is considered an important element for the perceived service as a website could be seen as intimidating for many users due to the complexity of the internet environment, so it is reasonable to expect that the ease-of-use of a website would be a decisive factor in perceived quality for a big part of the users.

Navigability is linked to the sequencing of pages, well-organized layout, and consistency of navigation protocols, as the website, should facilitate the users to get information in the fewest possible steps (G. Bressalles, 2013).

Again, it has been pointed out that the Customer Support (Information, Contact) has a leading role in determining the quality of the service offered and the full satisfaction of the users enabling the interaction between the users and the website, which always has been detected as one of the biggest obstacle for the adoption of eCommerce.

Taking into consideration all these factors and this environment, Manson (MC. Mason, 2015) presents a study conducted in Italy, that shows only a small number of wine companies view their website as a crucial part of their marketing strategy, while most producers just use internet as a merely communication or promotional tool.

It stresses how just few resources, compared to the enormous potential, have been invested by A. Perego (A. Perego, 2009)the wine sector in the eCommerce field and how the reluctance of the producers to change and to adopt new selling technologies, is the main obstacle in adopting the eCommerce.

From this excursion on the eCommerce level of adoption in the Food industry, it should be clear how important is the creation of solid and all-embracing web experience once the users land on a merchant website, understanding how to better involves him in our website concept and offering him a satisfying Customer Journey.

The website's offer is very differentiated in terms of both customer experience and customer service level and both are considered as central elements in the creation of the success of an eCommerce website. A. Perego (A. Perego, 2009) introduces us the Customer Journey Map built on the five main phases the consumer goes through while connecting to a B2C eCommerce website: the site entering and landing, the catalogue browsing and the product discovery, the product selection and personalization, the shopping cart management and the checkout process. For each of these phases the study identifies the most important drivers and assess the features of each driver.

The Customer Journey Map is a strategic tool developed for the first time in the CRM sector aimed to analyse and understand the website experience from the customer point of view, helping the organizations to examine the complexity and the quality of the processes and address the issues highlighted by the customers during their journey through the several *touch points* (A. Perego, 2009).

It could be considered as a "*time-based representation of the main stages that a customer goes through in interacting with a company or a service*" (Richardson, 2010). (D.W. Norton, 2013) states that "*Customer journey, in essence, means the sequence of events, whether designed or not, that customers go through to learn about, purchase and interact with company offerings*".

The several *touch points* are instead, simple moments of truth where the customer can verify the validity of the company's offer and they happen every time the user gets in touch in the several CJ phases. They can be Physical or Digital and Managed by the company or Un-managed (i.e. managed by third players). The study of E. Anderl (E. Anderl, 2014) has linked the touch points to multiple marketing channels and describe them as single moments

preceding a potential purchase decision.

The first stage presented by A. Prego (A. Perego, 2009) (Figure 12) is "Site entering and landing" and recalls how users enter the site and get engaged. The main ways refer to: use of Search Engines ("Search Engine Positioning" has become very important in generating visits on a website), connection with Newsletter of the website and the communication campaign, and finally typing the address in the URL bar. The landing page represents the first impact the customer has of the website and it lies much attention to speed of downloading, browsing features, immediate information availability and so on.

Figure 12: Customer Journey phases

It presents, then, the "Product discovery" that focuses on the exploration of the website by the users and the final discovery of the desired items. "*In this phase the user tries to understand how to browse within the website and get familiar with its structure and how start the search process*" (A. Perego, 2009). With that we have the "search and filtering" and "sorting and ordering" actions where the user can verify the navigability of the website using the features in terms of search engine, saving search results, page view options, and browsing menu till the description of the product preview.

"Product presentation" is characterized by the "product description", "price & other options", "images & media", "reviews and recommendation" and "product configuration" that are trying to overcome the lack of the physical contact with the product.

"Cart management" guides the user from selection to final purchase intention. The ability of the web designer to create a quick and simple flow for the user in this passage is critical, as this is distinguished by the highest drop-out rate through the phases of the purchasing process (Osservatorio, 2016).

To conclude the CJ, we land to the final "Check Out" phase, where the customer can select solutions for payment and shipment that better fit his needs.

Again, from Perego (A. Perego, 2009), the eCommerce user experience has been introduced with the CJ, but some factors such as CRM, delivery management and seamless iterations haven't been addressed.

Other researches, as Anderl (E. Anderl, 2014; Theuvsen, 2005), pointed out a study based on "clickstream", i.e. record of the users clicks made along their navigational path. It believed indeed, that clicks are direct behavioural response to an advertising exposure or to a particular website's feature.

According to D.W. Norton (D.W. Norton, 2013), the customer journey should be the end result of the implementation of a coherent strategic plan. Each company provides its own Customer Journey to their users, linked to different type of experience and different type of features, but all of them deploy their customer-centred vision in order to differentiate from competition and keep the organization's profitability.

By understanding the key moments relevant in the process and designing passages that deliver on those key moments, the organizations can better comprehend what are the customers' needs and succeed in the value proposition, in resource and revenue allocation, and cost structure.
Which experience is my customer looking for? And what kind of experience am I able to offer to my users? These are the two main questions that should be answered to build a reliable and satisfying experience model for the company ("value-in-use" concept, i.e. alignment of customer's goals and offers (Susan Rose, 2012).
So now, a digression on the Customer Experience (CE) and Online Customer Experience (OCE) need to be done.

Norton (D.W. Norton, 2013) introduces the concept of CE as not comprehensive just by a good service level (quick and easy transaction), but instead "*should be thought of as a sequence of events that involve customers, engaging them a customized drama in order to create a memorable, valuable encounter*".

The study from Teixeira (J. Teixeira, 2012) uses the customer experience modelling (CEM) as a tool to capture all the elements necessary to shape the perfect service solutions for the users and it is particularly helpful in the first phases of the service design processes. As some exogenous factors, as the social environment, could also affect the co-creation of unique experience between customer and merchants, the figures of the web designers can just design situation that "*better support customer in co-creating their desire experiences*" (Forlizzi, 2000). Indeed, rather than creating experiences, companies can design and orchestrate prerequisites and stimuli that enable the customers to have the desired experiences (A. Stein, 2015).

For that aim, CEM provides an efficient representation of the experience context, and considers the physical products, the technology-enabled systems, and the actors involved in each activity throughout a customer journey.
Understanding customer experiences requires catching rich information across all customer interactions with the service provider, in order to get and organize all of them, CEM is applied thorough a customer study based on interviews, observation, and contextual inquiry.

All the experience arisen from every single interaction between the customer and the service organization, should be taken into account, and according to Teixeira (J. Teixeira, 2012), CEM can facilitate understanding the CE and provide key insight to support service design process.

S. Rose (Susan Rose, 2012) stated that, through the last years, the theoretical understanding of online shopping behaviour has received a lot of attention, whereas less focus has been given to the formation of the customer experience that outcomes from users' interactions with ERetailers (OCE). They decided therefore, to empirically test a model for the relationship between antecedents and outcomes of OCE as the complexity of eRetailing landscape and the increasing importance of CE in the performances, lead the merchants to put a lot of efforts setting up a tangible OCE.

OCE should be analysed taking in consideration all its six dimensions as sensorial, emotional, cognitive, pragmatic, lifestyle and relational and it is defined as the subjective response to a website, an impression left on the users' mind that concerns cognitive and aesthetic experience states.

When talking about *Cognitive Experience State* (CES) our attention is focus on the creation of a flow and a subjective experience, while when the *Aesthetic Experience State* (AES) is mentioned, the focus goes on the practical needs and the necessity of control over the processes (J. Martin, 2015).

Rose (Susan Rose, 2012) consequently, points the ERetailers' future attention over the concept of control, empowerment of graphics, ease of use, customization, and interaction.

A research of 2013, (Klaus P. , 2013) affirms that communication can significantly reduce the risk perception associated with eCommerce and it also states that the ability to facilitate social interactions through the means of platforms all-along the CJ, such as customer reviews, positively influence user's trust and intentions in online environments, enhancing the credibility of the online service provider which is of the utmost importance in the online environment.

Attributes of OCE have both functional and psychological nature and they need to be developed making online users comfortable using a specific online purchasing platform.

The results of a study taken in USA, UK and SWEDEN concerning the OCE (Klaus P. , 2013), indicate that "*customers expect their experience to be closer to a physical shopping experience*" and "*if customers perceive the shopping environment as familiar, they are more likely to spend more time in this familiar environment*".

Through the interviews method, Stein (A. Stein, 2015) highlights that the atmospheric element, that in digital context is represented by colours, graphics, music, layout and design of the website or technological interface, provides visual and sensory stimuli that customers use to interpret the situation while interacting with the digital platform.

The technological interface, and in particular the elements of responsiveness and timeliness in the ease-to-use aspect of the technology, have a role of extreme importance, as the way technology can facilitate the transactions in an easy and convenient manner could have beneficial or detrimental impact on CE.

Across several interviews it has been also pointed out that the communication element is not only important for the promotional or informative level, but gives also confidence and provides the customers with peace of mind when it is used for order confirmation, while the review and feedbacks remain one of the elements that makes a huge difference in whether to go ahead or not in the final purchasing decision.

The final findings of this research (A. Stein, 2015), show that the technological aspects that involve responsiveness, timeliness, ease-of-use, ways of interaction and communication are significantly important in every single touch point that the customers face during their CJ. The recent technological innovations, in particular the internet and mobile apps, have revolutionized the retailing and service landscape and through them the merchants have been able to engage new services that enhance the level of commitment of the consumers and then, create a better CE.

The last group of papers analysed, face the topics of enhance websites' new features linked to the appearance of the website pages; the product presentation and the development of multichannel solutions as mobile and social paradigm shift has materialised in our daily life interactions.

In 2008 the study of Hausman (A.V. Hausman, 2008) critically examined the elements of web design, trying to catch which factors mostly affect the purchase and reuse intentions.
It has been done a distinction between "computer factors" that provides functionality to a websites and "human factors" that are defined as hedonic elements that contribute to user satisfaction and then entertainment.
The two elements of perceived ease of use (PEOU) and perceived usefulness (PU), according to the model used in this study, are the most influencing elements of behavioural intentions. Being able to improve these two elements through the introduction of new "computer factors" (e.g. dynamic menu, intuitive action buttons, organized website structure, etc.) and "human factors" (e.g. background colours, visual images, information collection, etc.) enable the company building stronger customer relationship, avoiding feelings of confusion, distraction and messiness of the customers and thus increasing the possibility to convert website visitors into real customers.

In fact, we have to think that the first principal reason, consumers go online, is linked to the search of information (Horrigan, 2008)and then the challenge for the firms is to be able to convert these users into shoppers, trying to attract their attention without overloading and compromising their perceptual processing patterns (J. Mosteller, 2014).
According to this, the study of Kim (C. Kim, 2012) states that the product quality offered on the online channel is not sufficient for fostering (re)purchase intention, as the eShoppers base their decision also on the fulfilment of their desires for entertainment, utility and service quickness. Only the creation of a perfect combination of information, security and website responsiveness could push the eShoppers number.
Additionally, studies like the one from McLean (G. McLean, 2015) on the key importance of

the presence of customer support in the online channel, explain that not just ease-of-use, security systems and quick information elements should be developed but a particular attention should be committed also to this topic.

Another component became indispensable in most shopping websites; it is the product presentation (M. Li, 2015).

In the eCommerce environment, effective product presentation not only attracts consumers to a website, but also provokes affective and cognitive responses, impacting on consumer purchase decision making, in the absence of the possibility to physically examine a product prior to purchase (J. Yoo, 2014).

The lack of sensory product experience continues to be the major deterrent to online purchasing in all the sectors and retailers try to fill the gap introducing innovative visualization tools as zoom, 360° and 3D views. This, due to the fact that, in some studies as in Yoo's study (J. Yoo, 2014), the visual information outperforms the verbal ones in customer responses and complex images result more engaging in shopping experience. As we said, there is not an unanimous opinion on this subject, as studies on this topic have produced dichotomized outcomes over the years, other scholars, indeed, have reported that visual product information is not that superior to its textual counterpart in terms of influencing shopping performance of consumers but they both complete, moderate and influence each other (M. Li, 2015).

Furthermore, around the topic of the web site features and eCommerce structure, (X. Yuan, 2011) presents a set of patterns appropriate for B2C eCommerce that encompass from the catalog pattern, to the shopping cart one, going through the invoice pattern and lastly the order and shipment pattern, where all the issues linked to each stage and the features needed for a compelling CJ have been presented.

Back to how the moments of interaction between customers and merchants (touch points) occur, we need to consider the consumer extremely rapid adoption of various internet-accessible device (e.g. tablets, smartphones) (J. Mosteller, 2014).

In considering the customer journey, the idea of online-to-offline flow and vice versa is common sense and seamless connection aspect has become a must to implement in 2016 (Skinner, 2010).

The consumers' shopping behaviour has changed in the recent years as their consumer experience has changed too over time, due to the introduction of multiple mobile channels, that brought also a new way of doing marketing for the firms (E. Pantano, 2015).

In fact, technologies have changed both the way the consumers purchase and the way organizations reach their clients (Demirkan, 2014).

Here, maybe more than in the traditional browser eCommerce, the user experience plays a role of utmost importance as it enters directly to the daily life and the habits of the consumers.

This new mobile CE generates value for consumers, by saving them time, saving them money, supporting their lifestyle, offering security in transactions, and offering quality collection services.

Now, the point of sale is no more just limited to the spatial dimensions and opening hours but distributed, in terms of access, anytime and anywhere, and the consumer is always ready to buy and the retailer is always ready to sell (Dennis, 2016).

Moreover, the current mobile technologies allow the separation of the purchase moment from the effective consumption. In this picture, users can buy anytime and anywhere using the mobile app and have the purchased item delivered to their homes or can collect it at a specific pick-up point (e.g. traditional store, lockers, etc.) (E. Pantano, 2015).

For what concerns the mobile marketing, the new strategies are based on "*how customers access information through their own mobile phone, which firms use as a means of delivering customized messages, services, and offers*" (Chou, 2016). In this way, the access information could be used in order to make strong relationships with consumers, "*engaging them with customized advertising messages and content, mobile commerce and mobile stores, etc*." (Watson, 2013).

Another branch concerning eCommerce that needs our attention is linked to the development of the social media, how the users use it in their purchasing process and how it affects the purchasing intentions of the consumers through the sharing information possibility.

The study of Pelet (J. Pelet, 2014) highlights how today's customers are less than ever passive shoppers. They're continuously using social media to reach information and read reviews about a product they're willing to buy since now they have more desire to share information and experiences (S. Quinton, 2016).

Users are not shy about providing their views and opinions, and this behaviour brings these instruments to be considered the most trusted form of advertising around the world (J. Pelet, 2014) (A. Bodini, 2011).

This new wave of interactions has led the firms to "suddenly be forced to listen to consumers' voices spread through several social media channels" (G. Szolnoki, 2013) but it also helped them to obtain valuable feedback, which is helpful to better understand the needs of the customers.

In a special way, wine seems to be particularly fitted for social media as it is considered a very emotionally item and its usual consumers are passionate and more than in other cases this type of costumers want to share their opinions (G. Szolnoki, 2013). Again, from Szolnoki (G. Szolnoki, 2013) research, has been identified that as in the Food eCommerce sectors also in the wine one, the American companies are more active and innovative in the use of these channels than the European ones. This will be also highlighted in the second part of the thesis, build on an empirical study of International Food and Beverage online shop solutions, as particularly innovative kind of Food eMerchants have been founded in the US market.

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3. EMPIRICAL RESEARCH

3.1 INTRODUCTION

In the second part, the thesis introduces an empirical research based on the investigation of several Customer Journeys proposed by online food merchants all around the world, comparing and pointing out the different services and features developed according to the several types of business model used (excluding the GDO).

The aim of the analysis is the identification and a census of the features proposed by the different websites that, even if they play in the same sector (eFood), they have different focus serving different markets. Furthermore, this research wants to analyse which phases, among the 5 principal ones of the Customer Journey (CJ), are the most structured and received the most attention by the several online players keeping introducing innovative solutions for the final eShoppers.
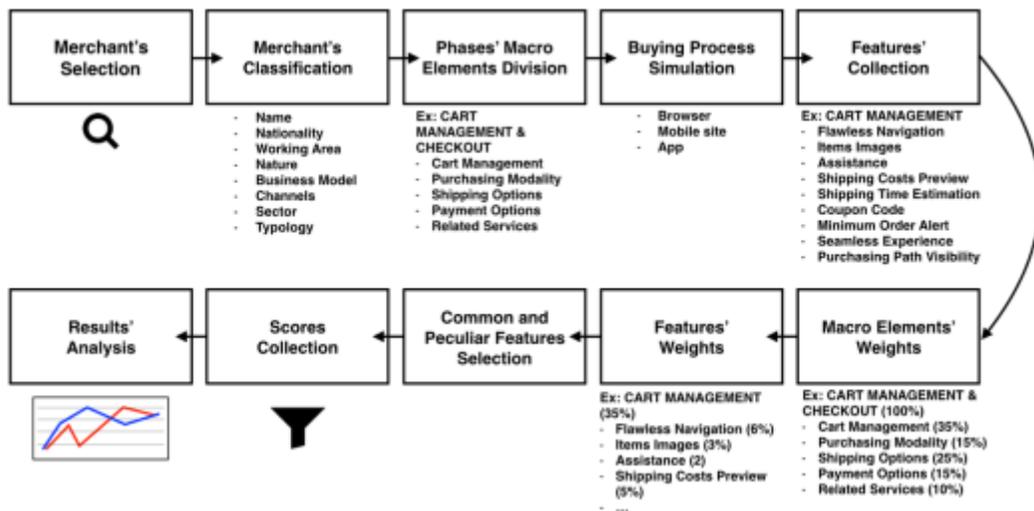
Figure 13: Flow diagram of the Empirical Study steps

Through the Figure 13, it is exhibited a macro scheme of the process made during the empirical study that has been made for all the 3 channels considered (*Browser*, *Mobile Site*, *App*), following these actions:

- Merchant's Selection: Selection of national and international merchants, operating in various sectors in the eFood market (also marketplace), in order to have a broad panel of merchants to analyse;

- Merchant's Classification: Classification of all the several information concerning the different merchants selected. Made in order to have several clusters to compare in the results phase;

- Phases' Macro Elements Division: For each phase, several macro elements have been found according to the different functionalities within each phase in order to bring organization for the next step;

- Buying Process Simulation: Navigation through all the merchants' websites, in all the steps of the CJ (no After Sale);

- Features' Collection: Census of all the features present in the home page, the different menus or screens, information and all the actions possible;

- Macro Elements' Weights: Weights assignment for every macro element according to their relevance;

- Features' Weights: Weights assignment for every feature/action possible based on importance and innovation;

- Common and Peculiar Features Selection: Definition of the features peculiar of the different products' typologies sold by the merchants;

- Scores Collection: Collection of the scores based on the presence of the features and the weights assigned considering first just the common elements and then all the peculiar elements;

- Results' Analysis: Numerical, graphical and qualitative analysis of the results according to the different sample analysed and compared;

So, after the first moment linked to the merchants' selection and classification of the players, the next step was the subdivision of the 5 phases in their own principal functionalities (called also macro elements in this paper) in order to be able to collect the several Website/App's features in a more schematic and organised way, addressing the features to a particular moment of the CJ.

Following this "preparation" part, it started the collection of the several features through the website/App navigation, simulating the buying process. Through the personal experience and the study of the literature presented before, two moments of weights addressing have taken place.

The first weights have been assigned to the macro elements according to their importance in the specific phase, the second wave of weights has been made on the several particular features within the macro element, according to the importance and the innovation of them. After the assignment of the weights it has been necessary to reflect on the several business model selected, understanding the possible difference of features presented according to the different service offered by the several business model. So, in order to do not have a biased result of this model, it has been made a differentiation among common features, that enable

a generic common comparison through the several business model, and peculiar features which has been pointed to the different business model which they belong. The results, at the end, have been collected and reflections on them as been made taking in consideration the differences between the merchants' type.

In the next pages, the passages made will be presented in a more exhaustive way.

3.2 PROCESS

At the beginning, after the selection of the several merchants operating in the eFood in several markets, a classification has been made, taking in consideration the nationality, the operating area (Local, National, International), the nature of the merchants (Dot com, Traditional), the business model used (Flash Sales, Food Delivery, Marketplace, ...), the channels used (Online, Multichannel), the sector (*Wine&Food*, *Food Services*) and the typology (*Food*, *Wine*, *Delivery*) (See Figure 14). The world of the merchants linked to the Wine&Food, contemplates groceries (no GDO) from virtual local markets to flagship websites, without considering the world of frozen food, and the world of beverage stretched from wine to coffee. For what is the *Food Service* concerned, it takes in consideration the "*Food Delivery*" of restaurant dishes and "Ready-to-eat" menu, made and cooked directly by the merchant (model developed in the U.S.). Additionally, the principal marketplaces who have faced the eFood sector have been selected for the analysis in order to have a broad vision of the entire sector.
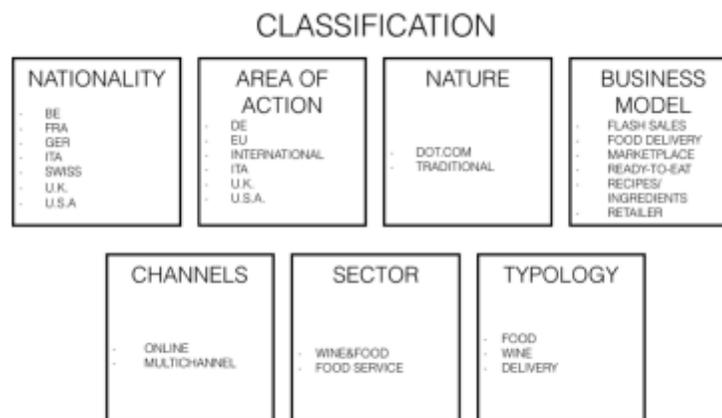
Figure 14: Merchants Classification Recap

The merchants' base is made of 42 different active merchants in the eFood market.
They come from different realities (*Food*, *Wine*, *Delivery*) and they developed their solutions in a different way according to their nature (Dot.com, Traditional). All the three channels active in this sector: *Browser*, *Mobile Site*, *App*, have been investigated.

The decision to analyse all the channels that has been developed in this reality through the last years, was made in order to have a comprehensive image of the overall situation of the eFood market and to verify the level of presence of the merchants in all the channel, understanding which ones are the most active in all the channels.

It was also an occasion to understand if some innovative features, strictly related to the mobile devices, have been implemented in this sector and where the innovation introduction happened more likely.

The number of active players, who have developed an own *Mobile App*, was really restricted against the number of merchants operating in the more traditional channels. This data wants to underline the fact that the eFood market is still undeveloped under several points of view, in particular with an unsatisfactory level of presence in the Smartphone channel which, as stated by Stein (A. Stein, 2015), has represented and it still is the revolutionary path to bond the customers to the of ECommerce channel.

- The *Browser* has considered the navigation of a website through the use of the PC having then, a simple overview of the Desktop version of the website, which could be considered as the more basic one. The navigation occurred through the use of the mouse and the keyboard and some peculiar actions have been considered, e.g. the hidden pocket menu option who couldn't be developed by other channels. 42 merchants have been analysed in this channel (26 *Food*, 6 *Wine*, 10 *Food Delivery*);

- The *Mobile Site*, considered two types of possibilities: the implementation of a simple adaptation of the Desktop content to the Mobile or the development of an ad-hoc website created for the Mobile channel with different content and features. The number of the actors who implemented the latter solution was very low and the majority chose the adaptation of the content. The *Mobile Site* channel was slightly different from the *Browser*, as the level of interaction has been shifted to a new modality with the use of gestures implemented on the Smartphones. The layout, the information and the structure was still the same. 42 merchants have been analysed in this channel (26 *Food*, 6 *Wine*, 10 *Food Delivery*);

- The *App* channel was rather singular, as it differs a lot from the two channels shown before. The aim of the use of the App is to provide promptness and a leaner interface to the users who decide to use it essentially, due to the ease-of-use more than for the information or the options available on it. This is also due to natural physical restrictions of the Smartphone screen. New features have been implemented in this channel as, the Bar-code scan for the product research or the use of fingerprint as a way of payment (which is still an undeveloped feature). Within the App world, the number of actors is much lower than the traditional channels and this underlines the fact that this channel for the eFood players is still immature. 17 merchants have been analysed in this channel (10 *Food*, 3 *Wine*, 4 *Food Delivery*). Anyway, in the App channel the most of the actors are represented by the food delivery business, which keeps 9 among 10 merchants proposed by the study. Here, they have been presented just 4 of them, due to the impossibility to find the information related to the most of the international actors. Overlooking this faulty step, it's possible to say that this type of merchants indeed, developed in a more focus way their own app, leaving the other two categories (*Food*, *Beverage*) far behind them. The only problem with these type of actors is still the lack of information about the products that affect heavily their overall results.
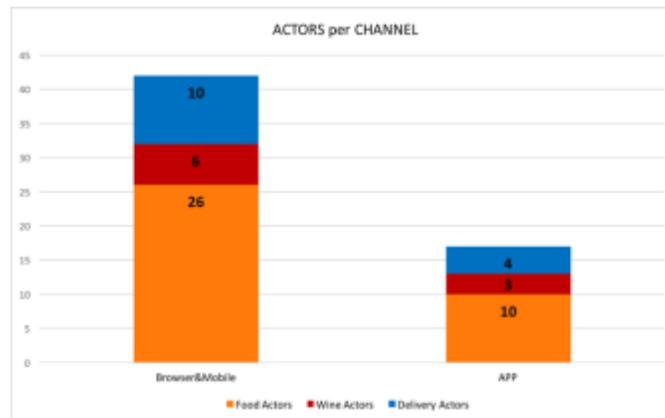
Figure 15: Number of actors analysed during the study in Browser/Mobile channel and in the App channel

They have been selected among Italian and foreign companies operating within and outside the Italian market.

It was necessary to find and analyse a good number of merchants, in order to have a reliable empirical research of the market.

The merchants have been selected from a simple research on Internet and from the base of merchants already known. In particular they have been selected and scrutinized whether on the Italian territory or operating in other countries (European nations, USA) and 3 types of channels have been taken in consideration: *Browser*, *Mobile Site* and *App*.

This decision has been taken thinking about the possible different features and services that can be offered linked to the different digital channels as the accessibility to the information should be weighted according to the different type of the tool used (PC, Smartphone). In our selection we listed 31 Dot.com merchants and 12 solutions coming from the world of traditional retailers that have developed personal online shop and applications. Here, it is possible to see the list of the merchants selected (Table 3).

MERCHANT	NATIONALITY	AREA OF ACTION	NATURE	BUISNESS MODEL	CHANNELS	SECTOR	TYPOLOGY
Eataly	ITA	EU + USA	Traditional	Retailer	Multichannel	Wine&Food	Food
Eataly Today	ITA	ITA	Traditional	Retailer	Multichannel	Wine&Food	Food
Peck	ITA	EU	Traditional	Retailer	Multichannel	Wine&Food	Food
Primo Taglio	ITA	ITA	Dot.com	Retailer	Online	Wine&Food	Food
Mercato Metropolitano	ITA	EU	Dot.com	Retailer	Multichannel	Wine&Food	Food
Lovetaly	ITA	EU	Dot.com	Retailer	Online	Wine&Food	Food
Svinando	ITA	ITA	Dot.com	Retailer	Online	Wine&Food	Wine
Giordano Vini	ITA	EU	Traditional	Retailer	Multichannel	Wine&Food	Wine
Olio Carli	ITA	ITA	Traditional	Retailer	Multichannel	Wine&Food	Food
Tannico	ITA	ITA	Dot.com	Retailer	Online	Wine&Food	Wine
DoyouWine	ITA	ITA	Dot.com	Retailer	Online	Wine&Food	Wine
De Cecco	ITA	EU	Traditional	Retailer	Multichannel	Wine&Food	Food
Nespresso	SWISS	INTERNATIONAL	Traditional	Retailer	Multichannel	Wine&Food	Food
Illy	ITA	INTERNATIONAL	Traditional	Retailer	Multichannel	Wine&Food	Food
Lavazza	ITA	INTERNATIONAL	Traditional	Retailer	Multichannel	Wine&Food	Food
Cortilia	ITA	ITA	Dot.com	Retailer	Online	Wine&Food	Food
Saclà	ITA	ITA	Traditional	Retailer	Multichannel	Wine&Food	Food
Nestlè	SWISS	DE/CH	Traditional	Retailer	Multichannel	Wine&Food	Food
Baci Perugina	ITA	0	Traditional	Retailer	Multichannel	Wine&Food	Food
Venchi	ITA	INTERNATIONAL	Traditional	Retailer	Multichannel	Wine&Food	Food
Just Eat	UK	INTERNATIONAL	Dot.com	Food Delivery	Online	Food Service	Delivery
Deliveroo	UK	INTERNATIONAL	Dot.com	Food Delivery	Online	Food Service	Delivery
Foodora	GER	EU	Dot.com	Food Delivery	Online	Food Service	Delivery
Grubhub	US	US	Dot.com	Food Delivery	Online	Food Service	Delivery
Saltedeats	US	US	Dot.com	Recipes+Ingredients	Online	Wine&Food	Food
Gobble.com	US	US	Dot.com	Recipes+Ingredients	Online	Wine&Food	Food
NatureBox	US	US	Dot.com	Retailer	Multichannel	Wine&Food	Food
Blue Apron	US	US	Dot.com	Recipes+Ingredients	Online	Wine&Food	Food
Good Eggs	US	US	Dot.com	Retailer	Online	Wine&Food	Food
Delivery Hero	GER	INTERNATIONAL	Dot.com	Food Delivery	Online	Food Service	Delivery
Freshly	US	US	Dot.com	Ready-to-eat menù	Online	Food Service	Delivery
Hello Fresh	US	US	Dot.com	Recipes+Ingredients	Online	Wine&Food	Food
Maple	US	US	Dot.com	Ready-to-eat menù	Online	Food Service	Delivery
The Purple Carrot	US	US	Dot.com	Recipes+Ingredients	Online	Wine&Food	Food
Farm Hill	US	US	Dot.com	Food Delivery	Online	Food Service	Delivery
Eattiamo	ITA	INTERNATIONAL	Dot.com	Retailer	Online	Wine&Food	Food
Take Eat Easy	BE	EU	Dot.com	Food Delivery	Online	Food Service	Delivery
Resto-in	FRA	EU	Dot.com	Food Delivery	Online	Food Service	Delivery
Amazon Prime Now	US	INTERNATIONAL	Dot.com	Marketplace	Multichannel	Wine&Food	Food
Amazon	US	INTERNATIONAL	Dot.com	Marketplace	Multichannel	Wine&Food	Food
Ebay	US	INTERNATIONAL	Dot.com	Marketplace	Online	Wine&Food	Food
Saldi Privati	ITA	ITA	Dot.com	Flash Sales	Online	Wine&Food	Wine
Gousto	UK	UK	Dot.com	Recipes+Ingredients	Online	Wine&Food	Food
Vente Privee	FRA	INTERNATIONAL	Dot.com	Flash Sales	Online	Wine&Food	Wine

Table 3: List and classification of the merchants used

The study took in consideration 5 phases of the CJ, which were identified with: *Site Access, Product Discovery, Product Presentation, Cart Management & Check Out, After Sales*. For each phase the principal functionalities (called also Macro Elements in this paper) have been highlighted and for every functionality a research has been made in order to find out the several features developed by all the merchants.

- **SITE ACCESS**: Home Page Access, Home Page Surfing, Account Management, Home Page features;

- **PRODUCT DISCOVERY**: Search, Filtering, Browsing, Sorting and Ordering, Product Preview;

- **PRODUCT PRESENTATION**: Description, Images, Price & Other Options, Reviews;

- **CART MANAGEMENT & CHECK OUT**: Cart Management, Purchasing Modality,

Shipping Options, Payment Options, Related Services;

- **AFTER SALES**: Purchase Confirmation, Newsletter, Order Tracking, Return Management;

All the information, linked to the features and the services developed in the sector, have been collected through the use of a buying simulation. In some occasions, the use of several e-mails helped to find out some information that were not that clear or lack during the simulation process. Once the data have been collected for all the merchants using the browser connection, then the same process happened for the mobile websites. In this section, the merchants distinguished themselves with the adaptation or not of a mobile optimization of the browser's version, or even an ad-hoc mobile website that differs from the browser for different solutions linked to the features.

The last data collection occurred for what concerns the "*Mobile Apps*" world, with new different features, a lean information structure and innovative solutions that exploit the smartphone's potentialities. In this part, the number of actors analysed, decreased, due to both the actual lower number of actors in the game, and the impossibility to download and access the information of international merchants that do not run their activities in the Italian territory. So, the research has been limited to the only merchants that operate in the Italian market with their own app downloadable in this region.

After the collection of all the data checking the presence or not of the several features in the 5 phases, the moment came to appoint several weights related to the different elements composing each phase, with the scope to have a total score of 100% per phase.
In this way it has been possible to evaluate in a better way the performances of each merchant regarding their CJ, giving more importance to the moments of the CJ considered as more significant to the final users. Not all the functionalities and features could be considered at the same level as they affect different moment of the CJ, which have different relevance, and so weight, for the customers.

The weight assignment happened in two stages:

- the first linked to the splitting of the total value of a phase among its own macro elements with different weights;

- the second associated with the assignment of different weights to the numerous features present along the CJ;

The first action taken in these terms, was the assignment of the weight to each macro element composing the different 5 phases according to their relevance within that specific phase.

With the next image (Figure 16), it's possible to see how the weights have been distributed among the macro elements within the several phases.
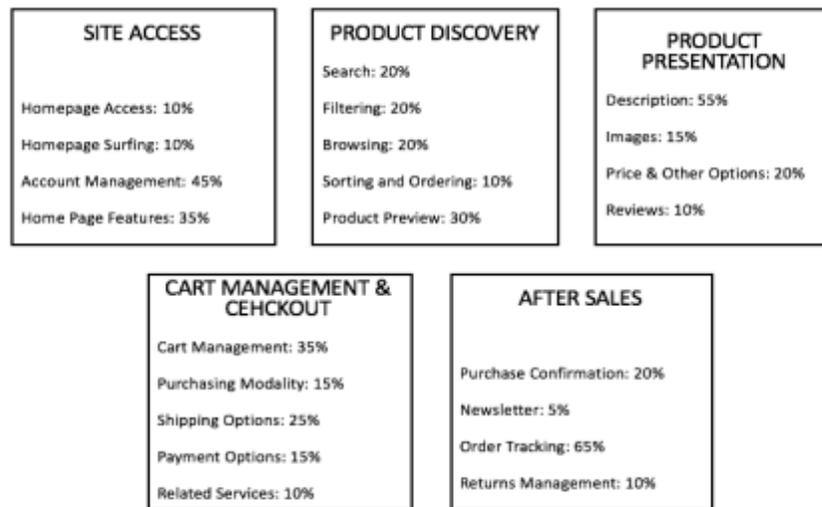

SITE ACCESS

Homepage Access: 10%

Homepage Surfing: 10%

Account Management: 45%

Home Page Features: 35%

PRODUCT DISCOVERY

Search: 20%

Filtering: 20%

Browsing: 20%

Sorting and Ordering: 10%

Product Preview: 30%

PRODUCT PRESENTATION

Description: 55%

Images: 15%

Price & Other Options: 20%

Reviews: 10%

CART MANAGEMENT & CEHCKOUT

Cart Management: 35%

Purchasing Modality: 15%

Shipping Options: 25%

Payment Options: 15%

Related Services: 10%

AFTER SALES

Purchase Confirmation: 20%

Newsletter: 5%

Order Tracking: 65%

Returns Management: 10%

Figure 16: Phases weight subdivision according to macro elements relevance

The weights related to each macro element of the phases were assigned arbitrarily after a moment of study and research through the previous presented papers (literature analysis) and other information acquired (User eXperience Design, 2016) (Content Marketing, "Microcontent: le piccolo attenzioni che fanno la differenza", 2016) (Content Marketing, 3 Consigli per realizzare un contenuto che converte, 2016). Furthermore, thinking about the personal experience made through the buying simulation in the several merchant's website proposed in the study helped the scope.

After the first weights phase, a second one has taken place inside each macro element. So, within every macro element identified with its own weight, several features have been highlighted and, according to the level of importance in the CJ, specific weights have been allocated to them in order to re-create all together the total weight of the macro element. Here a partial view of the excel file used, in order to help the understanding of the work made (Figure 17).

Figure 17: Excel sample of the model for features' weights (according to importance)

Some of the features inside the macro elements considered as mutually-exclusive, have been appointed with different weights in accordance to the different level of innovation. The most innovative one was marked with a higher weight, while the most common in this sense or the most easily to implement, have been assigned to a lower weight. Here an example of the weights distribution for the features found (Figure 18).

Shipping Costs (7,5%)					Shipping Modality (10%)					
Fixed	by Service	by Area	Included	Free Shipping Possibility	Standard	Premium	Express	Fast Delivery	Same Day	Time Window
4,00%	6,00%	3,00%	7,50%	1,00%	0,50%	1,00%	1,00%	2,50%	2,50%	5,00%

Figure 18: Excel sample of the model for mutually-exclusive features (according to innovation)

Having extended the research to several business model, from groceries, to wine shop, to food delivery and similar, it has been necessary to find out the peculiar factors of each segment, in order to avoid having faulty results at the end of our implementation. So, two kind of macro-results are shown in this study:

3) One generic, with just all the common elements that enables to find a General path of the entire eFood market and in order to have a first sight of the trends according to the channels, using a criteria of the same possibility of implementation for all the features by all the merchants;

4) One wider base for all the sectors and typologies, considering the peculiar elements too, that are introduced by several typologies of merchants operating in different sectors; these results give the possibility to compare the entire performance of the merchants and to understanding a broader picture of how the innovation has been introduced according to the different typology of merchants;

Identifying and excluding the peculiar features was the first step in order to highlight the first generic results, taking just in consideration the common features that could developed by every type of business model.

After this first phase, the peculiar features were put back to the analysis in order to have a new fully and complete sight where the results for each type of merchant have been collected, enabling a better comparison among them. With these results the performances of the merchants would increase according to the particular elements and features they introduced.

Generally, the merchants have introduced the features, peculiar of the typology of products they belong to, increasing the scores of the phases that, that type of merchant, care the most. Talking about "Sector", the merchants have been divided into "*Wine&Food*" and "*Food Service*".

This first distinction has been created in order to separate the players that act more like an eShop from others playing more like a delivery service. With this distinction it has been possible to compare these two worlds taking care about just the common elements, having a first print of the behaviour of the merchants, and then also developed more detailed results using all the peculiar elements. Furthermore, considering all the peculiar elements, another distinction has been made according to the typology inside the sectors: "*Wine*&*Food*" has been divided into "*Food*" and "*Wine*", while "*Food Service*" with the introduction of the peculiar features has become just "Delivery".
The number and the typology of merchants inside "*Food Service*" and "Delivery" was not changed, but a distinction of the label has been made just due to the introduction of the peculiar elements affecting the results. This type of analysis has been made in all the 3 channels: *Browser*, *Mobile Site*, *App.*

Here (Figure 19) the peculiar elements/features and their respective sector that reflect the focus of the different merchants according to their different type of customers (see the Hypothesis in the next paragraph).

Figure 19: Peculiar elements highlighted according to typology of products

- **SHOPPING HINTS** in *Site Access* and *Product Presentation*, peculiar of: *Food*, *Wine*;

- **RECIPES** in Site Access and *Product Presentation*, peculiar of: *Food*, *Wine*;

- **SEARCH BY LOCATION** in *Site Access*, peculiar of: *Food Delivery*;

- **RESTAURANT RATINGS** in *Site Access*, peculiar of: *Food Delivery*;

- **IMAGES** in *Product Discovery* and *Product Presentation*, peculiar of: *Food*, *Wine*;

- **RATINGS** in *Product Discovery*, peculiar of: *Wine*;

- **DELIVERY TIME WINDOWS** in *Cart Management and Check Out*, peculiar of: *Food Delivery*;

- **COLLECT OPTION** in the Returns Management in *After Sales*, peculiar of: *Food*, *Wine*;

Below here a little table to help the understanding of the process of separation of common and peculiar elements that has brought to several results (Figure 20).
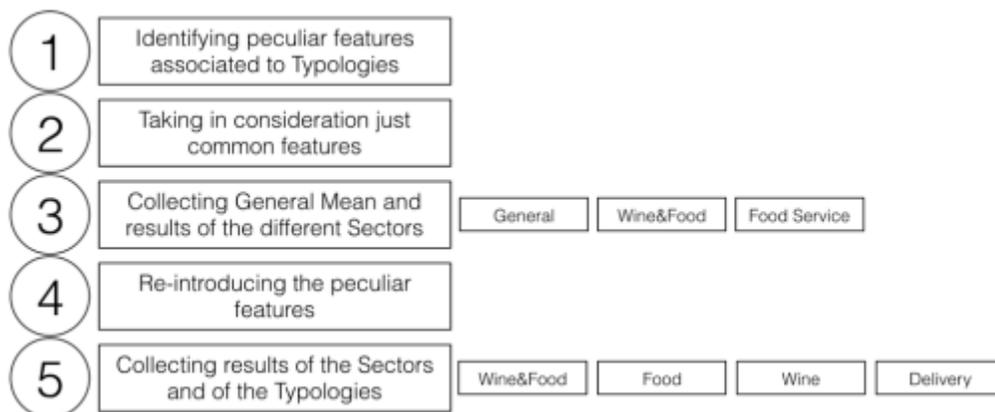

Figure 20: Common & Peculiar division scheme with results

4. RESULTS

4.1 INTRODUCTION

The aim of this study is to understand the actual situation of the eFood sector, considering the Customer Journey's development among the food merchants of different sectors (*Wine*&*Food*, *Food Service*), different typologies (*Food*, *Wine*, *Delivery*), different channels (*Browser*, *Mobile*, *App*) and different nature (Traditional, Dot.com).

The scope is to find the last innovations introduced by food merchants in the digital market and to compare the different performances of the market players, in order to understand which type of merchant has been able to engage the customers in the best way and the features or services that allow him to find a best practice.

Through the selection of common or peculiar elements, it has been possible to achieve several results and have cross-checked data that made possible the comparison on different levels. The phases that achieved the best and the least results have been pointed out through the overall results and among the typology of the merchants taken in consideration. It has been possible to look at the General Mean of the eFood market, to compare the 3 channels used (*Browser*, *Mobile Site*, *App*) and then also, to analyse and compare the different results collected by the several sectors and typology of products (*Food*, *Wine*, *Delivery*).

Furthermore, in the Browser channel other results has been highlighted with an investigation among the Nature of the merchants (Traditional, Dot.com), the Nationality (ITA vs EXT), the business focus (Marketplace vs Food-Focus).

The results will be presented following the scheme below:

- PHASES' OVERALL RESULTS and analysis considering the general mean (all the typology of merchants) with just common elements;

- CHANNELS comparison considering the results with common elements;

- Analysis in the *Browser* channel of the different typology of BUSINESS MODEL, NATIONALITY AND BUSINESS FOCUS;

- Comparison between the results obtained with COMMON results and with PECULIAR elements added;

- BEST and WORST results achieved by the merchants with peculiar elements;

- RANKING of the merchants considering all the channels;

4.2 POINTS ASSIGNMENT

Talking about the results, and the comparison among them per the different clusters, the scores will be shown on a maximum of 5,00 points, that represent the maximum achievable result, having for each phase a total score of 100% and considering all the five phases.

The merchants' results for each phase have been calculated using the weight linked to the specific feature, multiplied by 1 or according to the presence of that feature in the merchant analysed. Then, the results for all the phases have been collected together to form the final score related to the overall result of the merchant's CJ.

4.3 HYPOTHESIS - PREMISE

At the beginning of the study a hypothesis has been made. According to the several business models analysed, the actors of the several business models could pay different level of attention in different moments (phases) of the CJ.

Their level of focus on the different 5 phases could not be the same, with some business model more focused on the *Product Presentation* and others, like the food delivery, more deeply involved in the Shipping and Delivery processes. This is also confirmed by the fact that some of the futures contemplated as business-model-peculiar in the previous paragraph, are indeed developed in those phases, which their business model should be more aware of. In these terms, the world of *Wine*&*Food* had been evaluated as a possible supporter of the 2nd and 3rd phases (*Product Discovery*, *Product Presentation*) more than the Delivery one. This due to the thought that the interest for the amount of information available on the producer, the origin and the ingredients, should capture more effectively the attention of the eShopper looking for those kinds of products.

On the other hand, the world of *Food Service* (*Delivery*), that already guarantees the quality of the dishes through the selection of a panel of restaurant it serves, could pay more attention to the phases linked to the promptness of the delivery, having put on this topic much more investments than on other elements.

Considering all the three channels used (*Browser*, *Mobile Site*, *App*), the results, essentially, confirmed these trends.

4.4 GENERAL RESULTS

The first results that will be shown, have analysed the overall situation, considering just the common elements and want to show the overall performances of the channels seeing the scores reached by each phase.

In the figures below (Figure 21 - 22 - 23), it's possible to look at the merchants' performances linked to the *Browser*, the *Mobile Site* and the *App* channels. An integrative table collect the main results. The general means, the maximum and the minimum are displayed considering all the actors at the same level of elements, so just with the common ones.
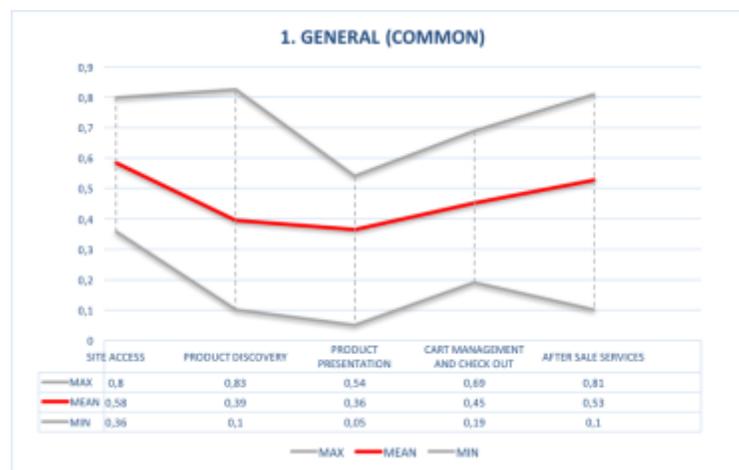

Figure 21: Analysis of the General trend of all the merchants, considering the common elements in the Browser channel
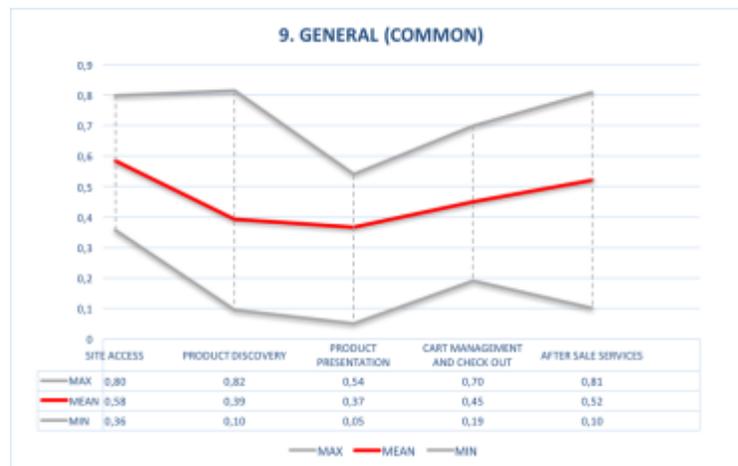

Figure 22: Analysis of the General trend of all the merchants, considering the common elements in the Mobile Site channel
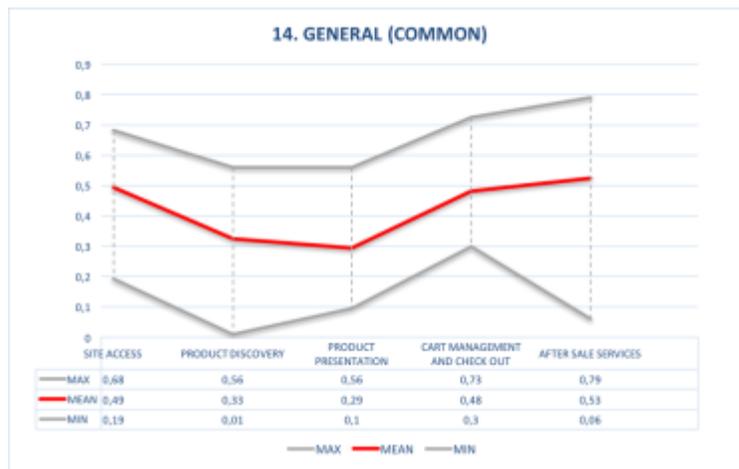
Figure 23: Analysis of the General trend of all the merchants, considering the common elements in the Mobile App channel

During this study, the 1st and the 5th phases (*Site Access*, *After Sales*) have scored the best results with a higher mean among the 5 phases in all the channels (*Browser*, *Mobile Site*, *App*).

In the same way, the 3rd phase (*Product Presentation*) revealed itself as the weaker phase in the CJ. This result could be linked to two main factors: the presence of the *Food Service* actors that, for their nature, have a weak 3rd phase, and the high level of innovation presents in this phases that rewards a few and prejudice the many, making very difficult to reach the full score in the phases.

The fact that *Food Service* players have a 3rd phase weaker than the other merchants, is caused by the circumstance that they don't have pictures or big description of the dishes proposed, as they basically show some restaurants' menu with just the name of the dishes and a brief description.

At the same time, it has been impossible to give to the 3rd phase a lower weight for this specific segment, due to the intrinsic importance of that that phase (*Product Presentation*) along the CJ.

For what concerns the different channels, these results made feasible a further comparison among them overlapping their results.

Before heading this point, it's worth to introduce them and the reason why they all have been considered.

4.5 CHANNELS

The channels analysed, as said before, are: *Browser*, *Mobile Site* and *Mobile App*.
The comparison among these three channels has been made looking just to the merchants who are actively doing business on the Italian territory.

This decision has been made in order to a have a more comparable base on which create our results, taking in consideration the fact that was impossible to reach all the information in the *App* channel of the merchants who do not operate in Italy. The results, as you can see in the next graphs, highlighted the similarity between the first twos channel adopted, as it was also anticipated before, and then explain the difference between them and the last developed *Mobile App* channel.

The first graph of this comparison, is dedicated to the comparison between the most traditional channels developed in the eCommerce: The Browser channel and the Mobile Site. It is possible to say that, the adoption of the *Mobile Site* happened like a subsequent adaptation of the *Browser*'s content to the mobile devices, enlarging with low investments, the possible point of touch with the customers. To sustain that, the data of the number of actors who have developed an ad-hoc website for the mobile use. In fact, just 8 Merchants on the 43 analysed by the study have decided to implement a completely different ad-hoc website for the *Mobile* use.

For this reason, with the graph in the Figure 24, it's possible to see the almost overlapping effect of the results of these two channels which have the same trends of the performances as also the almost same scores in each phase (the only different is in the last phase linked to the *After Sales*, where a minimum deviation is noticed in favour of the Browser + 1%).
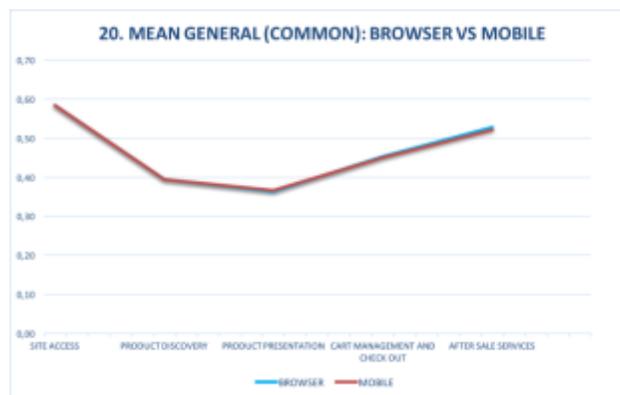

Figure 24: Performance's comparison of Browser and Mobile channel, considering the general trend of all the merchants

So, thanks to that, we can consider these two channels with a same performance and then, focus the attention more on the *App* channel.
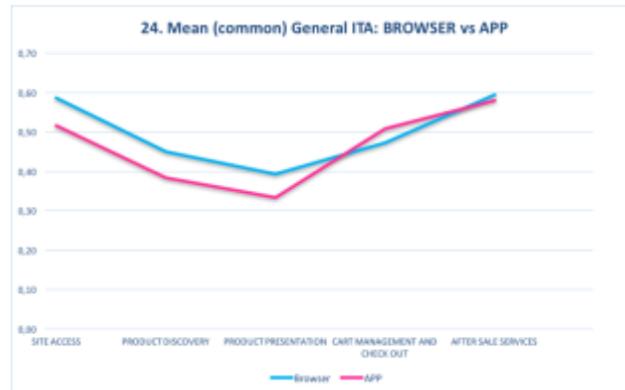

Figure 25: Performance's comparison of Browser and App channel, considering the general trend of all the merchants

In this second graph (Figure 25), the overall results of the performances of the merchants in *Browser* and *App* channel, are shown through the comparison between their general means, comprehensive of all the typology of Product and Business Models. With the introduction of the *Mobile App* it was expected an increase in the last phases (*Cart Management and Check Out, After Sales*) as they represent the added services that could be developed better in this channel more than the previous phases rich of information and content. As highlighted by the results, this effect actually happened with the introduction of the *Mobile App*, increasing the scores of them, especially in the 4th phase where the performances have an increase of +8,5%.

In the first phases the results hadn't recorded any type of increase, on the contrary the results are below the ones registered by the *Browser* channel.
As stated few sentences before, this trends could be considered in line with the nature of this two channels. The *Browser* channel indeed, could provide a bigger amount and better information than the *App* channel, which, on the other side, try to be more attractive for its type of customer looking for quicker response, faster management and ease-of-use through the development of added services.

4.6 TYPOLOGY OF MERCHANTS

The next results that will be shown, are linked to the different typology of merchants, not linked to the products they offer, but referred to their nature and characteristics:

- ITA vs EXT: the performances of the Italian merchants in the eChannel are compared to the results achieved by all the other merchants coming from different countries. This comparison has been made in order to understand the main differences among them, being able to have a picture of the Italian players in the international context.

In the Figure 27, it is shown the path of the means of the two categories: Italian actors (ITA) and all the other countries (EXT). The merchants' base used in this analysis is balanced, having 19 Italian merchants and 23 foreigners. The Italian merchants have always had better results in all the phases.

Figure 27: Comparison between the performances of the merchants active in Italy and the foreign merchants
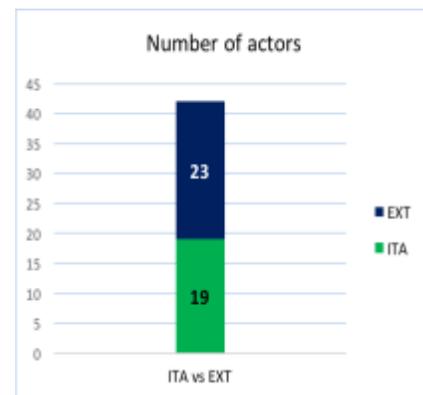
Figure 26: Number of actors according to their typology (ITA and EXT)

- TRADITIONAL vs DOT.COM: here, the analysis wants to face the performances' differences, between the solutions developed by traditional merchants who had decided to enter in the digital market, and the digital native companies who began their business starting from the eChannel (so called Dot.com).

With the next results (Figure 29), it has been shown the slight difference between the traditional actors, who decided to implement a solution for the eChannel (Traditional) and the digital native actors (Dot.com). The number of the actors selected are in favour to the Dot.com, with 30 actors against 12 Traditional. The results represented by the

graph, show, as before, the same path through the phases. Here, the Traditional actors have recorded better results among all the phases against the Dot.com.

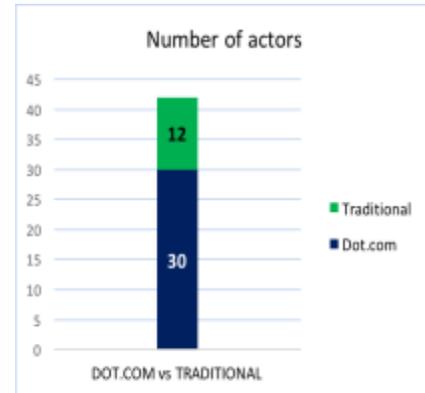*Figure 29: Comparison between the performances of the Traditional merchants and pure Dot.com*

Figure 28: Number of actors according to their typology (TRADITIONAL AND DOT.COM)

- FOOD-FOCUS vs MARKETPLACE: In the study some marketplaces active in the eFood market (having among the products' categories also wine and/or food), were selected in order to have a broad base to work on with different type of actors. The fact that marketplace, born without a specific focus on the groceries products have introduced them in the last years, is another element that confirms how the eFood reality is considered as interesting as potential. Their results will be compared with the scores reached by the more "Food-focus" actors that have in the Food and Beverage their main business.

The last comparison (Figure 31) highlights the difference among the actors that have a specific food focus and the more general marketplaces. The actors that play as marketplaces in this sector, were just few (4) and the most of the actors then are engaged as "Food-focus". As it's shown, the results scored by the marketplaces are better than the other merchants but also here the results could be sullied by the presence of the *Food Delivery* merchants, all in the Food-focus category.

The overall paths of these three results are very similar, with the 1st and the 5th phases with the best results and a central decrease according to the 3rd phase. The main difference of these trends happened at the 5th phase (*After Sales*), where some categories registered a bigger increase against the previous phase than the foreigners, that scored a more moderate gap.
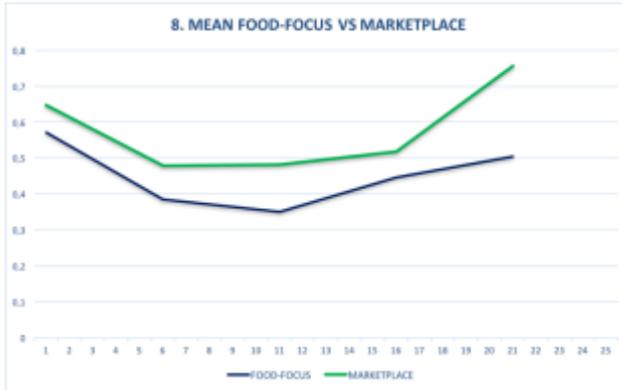
Figure 31: Comparison between the performances of the Food-focus merchants and Marketplace

Figure 30: Numbers of actors according to their typology (FOOD-FOCUS and MARKETPLACE)

As stated in the previous paragraph, the weakest among all the actors, are considered the Food Delivery ones and if we look to their nationality, their nature and their focus, it's worth to say that they *all* belong to foreign countries (EXT), they are *all* Digital native (DOT.COM) and lastly they are of course, *all* focused on the food sector (FOOD-FOCUS). This situation has had a strong influence to the results in these comparisons, as all these three categories along the comparisons, have registered the weakest results.

So, without any hesitation, it's possible to say that the presence of the Food-delivery in these categories, taken in consideration, sullied the results.

Even thou the results in the last three graphs had highlighted the same results, and the same problems, it was worth to show them, giving a full picture of the actual situation, through the comparison between all the typologies of merchants.

After this first analysis, that took in consideration the common elements to have a first view of the overall path of the results, linked to the channels and to the characteristics of the merchants, now, the peculiar elements for each type of product merchants will be added, enabling a comparison among them considering their total scores.

4.7 FOOD, WINE & DELIVERY – PECULIAR ELEMENTS

The peculiar elements were introduced in order to have good criteria to which compare all the different merchants' products with. They have been distinguished in: *Food*, *Wine* and *Delivery*.

The results, of course, have scored higher points with the introduction of the peculiar elements (as stated before in the Results introduction) and generally have been linked to the phases seen as more important according to the typology of merchants.

Now, it will be presented the effect of adding the peculiar elements to the common base analysing the gap generated between the results.

In order to compare these results, it was necessary to create a common base.
On one hand, it was impossible in the first step of study (the one with just common elements) to make a reliable distinction among the different type of products linked to the market, which is more appropriate to the peculiar elements analysis.
On the other hand, with the introduction of the peculiar elements, it was impossible to use a generic mean, considering all the actors, as made with the common elements.
So, for this stage, the results' comparison has been made looking at the results of the different sectors (*Wine&Food*, *Food Service*) that was possible to distinguished in both cases.

The first two graphs (Figure 32 - 33) show the different performances of the sectors before and after the introduction of the peculiar elements in the Browser channel.
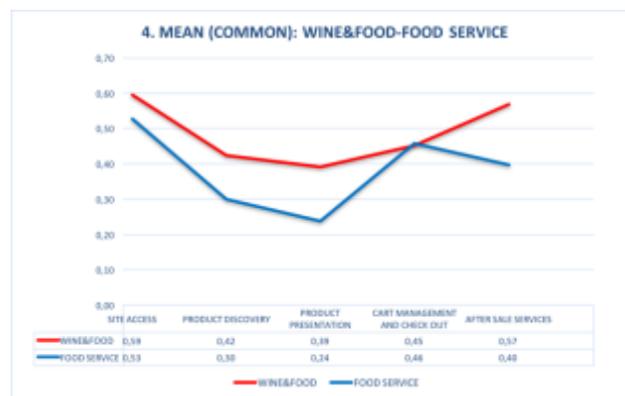

Figure 32: Browser's performances of the actors considering just the common elements
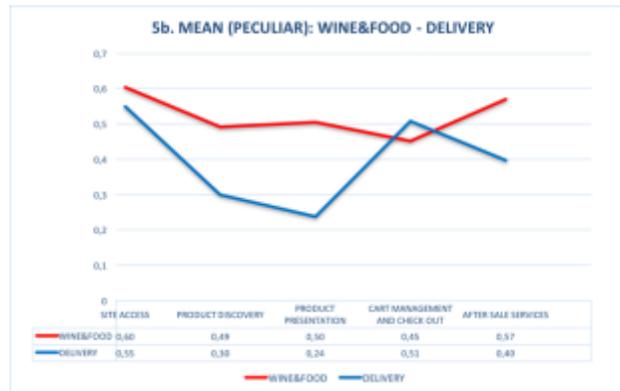
Figure 33: Browser's performances of the actors considering also the peculiar elements

If the 3rd phase has resulted as the weakest one with the general comparison results in all the channels, here, it is already possible to see how it is influenced by the performance of the *Food Service* merchants which have problems in the implementation of the 3rd phase (confirmation of the hypothesis made before).
Above this results, which will be presented also below in this paragraph, it's wort to make a comparison of the results achieved with and without the peculiar elements.

In the *Wine&Food* sector, the results with the peculiar elements have brought an increase in more than one phase. The 2nd and the 3rd phases registered an increase in their scores, in particular: +14% in the *Product Discovery*, +28% in the *Product Presentation*.
These boosts are essentially in line with the fact that this sector points most of its attention in these phases and the gap is quite impressive.
This improvement, is due the specificity of the elements added to these phases. The hints with the recipes have fostered the 1st phase, while the presence of the images, highly taken into consideration by the web users, inevitably increase the performance of both (1st and 2nd phases). They encourage the customers and stimulate their curiosity and interest. This is what the Delivery merchants have not developed and then create the lacuna in these phases.

In the *Delivery* sector, influenced by also these facts, the most affected phase was the 4th – *Cart Management & Check Out*, which make sense with the focus of this sector. Anyway, the improvements made have been lower than the ones recorded by the *Wine&Food* (+10%).

The *Delivery* actors also, made something more, increasing their results with the introduction of some peculiar features also in the first phases of the CJ. They, in fact, introduced features as "*Search by Location*" and "*Restaurant Rating*" which were linked to the first phases, even though it was expected a more focus in the 4th phase, the most important for these type of merchants.

These two elements presented some lines above, are seen as very important elements for the customers as they help them to select the restaurants where they purchase the dinner, and give more serenity and security to the users, which are considered among the most difficult aims of the digital channel.

The *Wine&Food* sector has been the dominant one, but here, for the first time the Delivery merchants have been able to overtake the performance of the *Wine&Food* with a good gap (0,51/1,00 vs 0,45/1,00). The new elements added, underline that the *Food Delivery* services are the best in facilitating and manage the phase of *Cart Management & Check Out* as it should be.

The next graphs (Figure 34 - 35), will not present the comparison of the results in the *Mobile Site* channel as it should be, but they go straight forward to the *Mobile App* channel.

This has been decided due to the high level of similarity between the results of the *Browser* and the *Mobile* channels, as also seen before in the channel comparison.

The situation for the *App* channel, which is also a kind of different channel too in front of the two more traditional (*Browser, Mobile Site*), shows a situation which is quite similar but where the *Wine&Food* merchants beat the Delivery merchants also in that phase where they were able to surpass them in the *Browser* (*Cart Management & Check Out*).

Furthermore, here it's possible to see how the scores in this channel are essentially lower than the *Browser*, as also seen in the general analysis, and it is particularly true for the *Food Delivery* merchants, but this will be the topic, mentioned in the next pages.
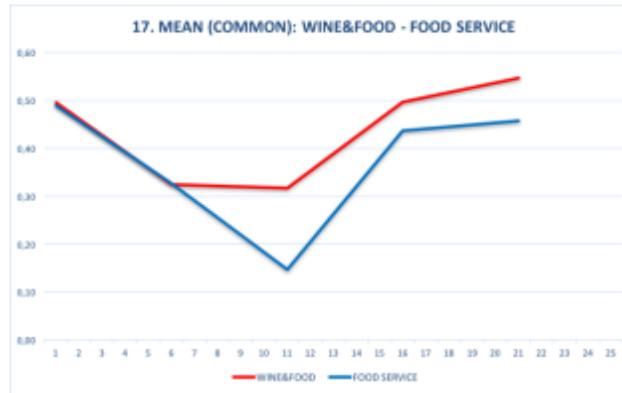
Figure 34: App's performances of the actors considering just the common elements

Figure 35: App's performances of the actors considering also the peculiar elements

Back to the analysis of Common Vs Peculiar, if you pay attention to the 2nd and 3rd phase, it's possible to see how the introduction of the peculiar elements helped the *Wine&Food* to increase their performances in these phases (+15% and +28%).
On the other side, the introduction of the peculiar elements for the Delivery segment helped just a little bit the 4th phase (+8%).

These effects are completely in line with the increase in the results, seen at the *Browser* level and then underline the fact that, the peculiar elements added, have influenced the phases the types of merchants care the most (as said before with the hypothesis).

4.8 CHANNELS COMPARISON

As a transit point between these comparisons and the analysis on the different products, here it is presented another type of analysis among our three channels on the introduction of the peculiar elements for the typology of products.

In the *App* channel, for its nature, the phases that should be encouraged are located in the last part of the CJ as they could be considered like added service, so it was expected that the 4th and the 5th phases (*Cart Management & Check Out*, *After Sales*) could be increased against the *Browser* channel.
Also, due to the similarity between *Browser*'s and *Mobile Site*'s results, here are shown just the *Browser* Vs *App*.

The graphs show the performance's trends of three different type of products (*Food, Wine, Delivery*) with the peculiar elements added, comparing their performances in the Browser channel and developing the *App* channel.
In order to compare these two channels, it was necessary to think about the merchants' base to use as the number of actors which was too different between this channels (42 actors in *Browser* Vs 17 in the *App* channel). So, as anticipated before, the results considered just the number of actors operating on the Italian territory.

As it's possible to see in the first two graphs 36 - 37, the world of *Food* and *Wine* reacts in the same way to the *App* channel, implementing their performances at the level of the 4th and 5th phases, doing better than in the previous traditional channel.
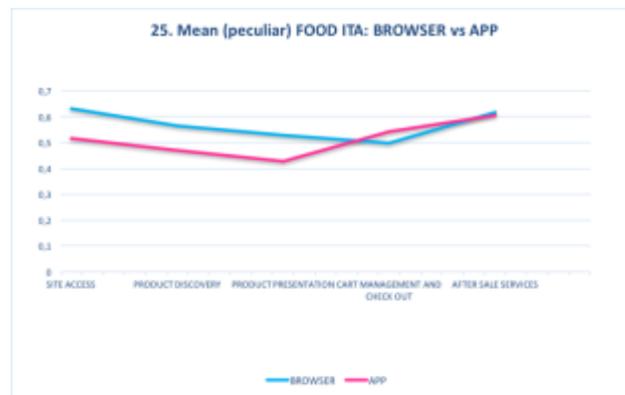

Figure 36: Channels comparison, Browser and App performances for the Food merchants

70
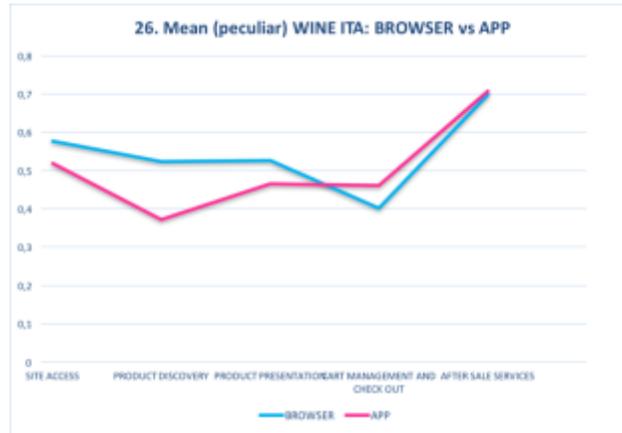
Figure 37: Channels comparison, Browser and App performances for the Wine merchants

In the scores, highlighted by the world of *Food Delivery* (figure 38), the situation changes just a little bit. The performance of the *App* channel is essentially better than the *Browser*, not just in the last phases but also in the first two.

It could be caused by the huge attention payed by this type of actors in the mobile world from the very first moment they launch their products.

Probably, the integration and the use of the characteristics of the smartdevices, help them to fill the gap in the first phases, as the App proves to be more friendly and reactive to the user interactions, fostering then the results here.

The possibility to exploit the possibility to reach the customers every time, everywhere in their daily life through their personal mobile devices, could be the reason why these new type of merchants put such efforts in this direction instead of using the more traditional channels.

Anyway, the delivery merchants' problem linked to the 3rd phase remains, and it was even more evident in the *App* channel as it should be.

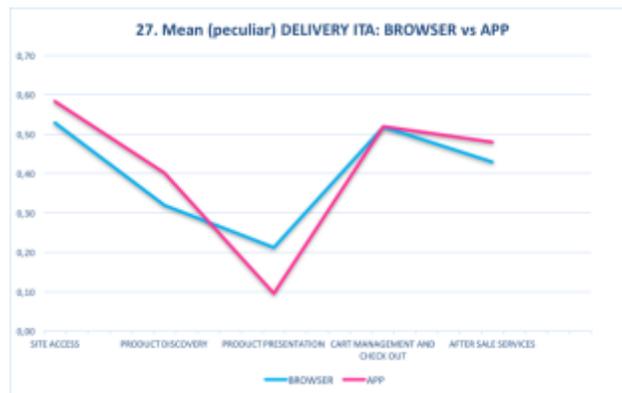*Figure 38: Channels comparison, Browser and App performances for the Delivery merchants*

Essentially, these results confirm the general trend saw in the paragraph 4.4 with the comparison between the channel in the general mean for the merchants.

With these results, they were shown a first sight to the performance of the different type of merchants linked to the several products, also that will be presented with a deeper focus later on, but something could be already said.

Now, it's possible to say that the Food represents the most constant performance through the phases, while the Wine, more volatile under this aspect, reach the best score in the 5th phase.

The 5th phase it is strictly related to the tracking and returns management activities (if combined together, they cover the 75% of the *After Sales* weight). The fact that the wine retailers had best scores here against the other clusters of products, is linked to the fact that the wine is the only typology of product that could have better developed this aspect as, it's quite uncommon the return management in the food sector, especially the *Food Delivery*.

The *Food Delivery* actors, which scored even here, after the adding of the peculiar elements, the floppiest performance, have serious problems in the 3rd phase, but it was already presented before.

The very bad results collected by the *Food Delivery* merchants, are produced by the constant insufficient performances in the 2nd and 3rd phases (*Product Discovery, Product Presentation*). In fact, even though their type of activities does not require a deep development of these phases (they just have the dishes menu uploaded by the several restaurants), these parts are still considered as always relevant to the user that land on a website.

4.9 BEST & WOST RESULTS

Now in this paragraph, the evaluation of the results recorded according to the different typology of merchants will be presented with some recapitulatory graphs that collect their performances in the channels and compare them highlighting the best and the worst practice.

Below (Figures 39 – 40), it will be presented a comparison between the results of the merchants in the different channels to understand, in a comprehensive graph, the actual situation.
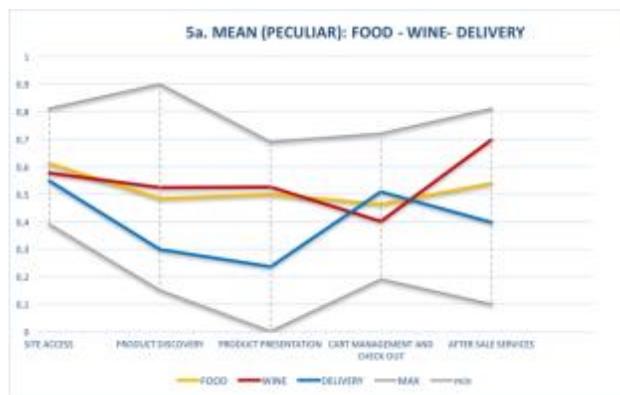

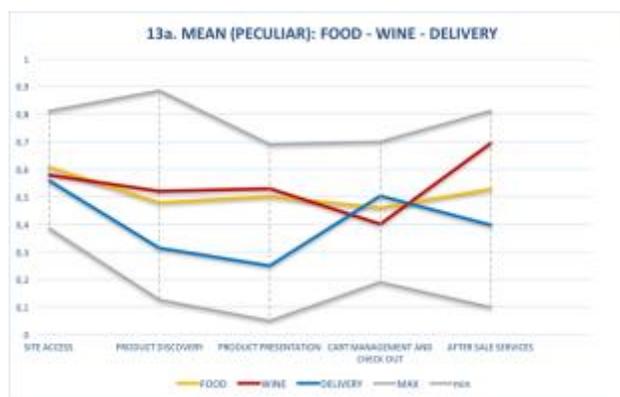*Figure 39: Browser performances per products considered*

Figure 40: Mobile Site performances per products considered

The results of the first two channels analysed (*Browser* and *Mobile Site*) are presented together as they have recorded almost identical trends and performances among the actors.

The *Food* sector, the one who keeps the steadiest performance among the merchants' typologies, has always shown scores that landed in the middle between the other two. The only moment where it imposed itself above the others, happened at the level of the 1st phase, where also, all the typologies of merchants performed well, with close scores' gap between each other. The level of performance shown by these merchants, is thanks to the good balance created along the different phases, putting the graphical and process-enabler elements.

The *Wine* merchants in these channels, have performed essentially the best results along all the CJ, except in the 4th phase where their scores fall down to the last position. The possible answer could be linked to the nature of the products, where in the perishable goods sector, so in Food and *Delivery* sectors, better and quicker solutions have been designed in this phase. The time window for the delivery indeed, as also the possibility of having different services and options for the delivery management, have been developed better in the other merchants.

The merchants that operate as *Delivery* services, have always revealed themselves as the weakest ones and as you can see here, the gaps in the phases confirm what said before. Again, it's worth to say that the phases they perform better, is the 4th (*Cart Management and Check Out*), that has enabled them to reach the top of the ranking.
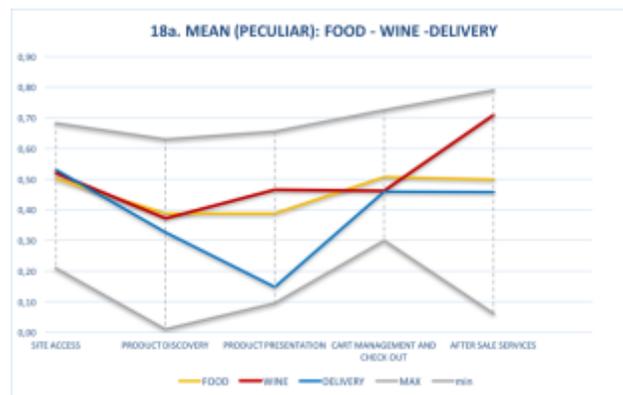

Figure 41: App performances per products considered

For what concerns the App channel (Figure 41), the trends are still very similar to the previous ones but here the Delivery scored the best result in the 1st phase and not in the 4th, where these merchants struggle behind the others.
They close the gaps with the other actors in the first two phases through the introduction

of the *App*, and also they keep the score of the 5th phase in line with the 4th while before it was lower.

So, the overall performance underscores a better path of the Delivery players, that saw a great opportunity in this field and clearly put a lot of efforts for the development of a comprehensive solutions for the mobile devices (as said before with the introduction of special features thanks to the *App*). It's worth to say that most of the *Delivery* merchants furthermore, were born-in *App* merchants.

Now they are gonna to be presented, in the table below, the results linked to the best and worst practice and an overview of the rankings, according to the different channel and typology of products.

The best practice revealed by the analysis of all the typology of merchants, among the three channels, is represented by EATALY in the *Browser* channel, an Italian food grocery actor that, after the establishment of its own international retails network, landed in the digital market with its own eShop, both in the *Browser* and in the mobile *App* context.

The best results come from the *Browser* channel, where, through the development of high information standards and features available for the customers, reached the score of 3,55/5,00 [the total score is 5,00 as, for each of the 5 phases, the maximum score should be 1,00(100%)].

The best score of EATALY is at the level of the 2nd phase (*Product Discovery*) with 0,89/1,00, while the others performed very good results, with the weakest one 3rd phase (*Product Presentation*) that anyway, scored 0,54/1,00 (Table 4).

SITE ACCESS	PRODUCT DISCOVERY	PRODUCT PRESENTATION	CART MANAGEMENT & CHECK OUT	AFTER SALES
0,77	0,89	0,54	0,63	0,71

Table 4: EATALY performance per phases

It represents then, the best practice seen along the entire study and it confirms the fact that the *Food* merchants could exploit better these digital channels, against Wine and *Delivery* ones.

It has always scored good results, way above the mean of its cluster, in all the phases. It represents the best combination between the level of information available and the innovation's efforts put in place to introduce important features for the website.

For instance, it is one of the few introducing, in the search function, a real-time curtain that collects and suggests all the results linked to the type-in field, to the categories, typologies of products, producers and other cross-filters (Figure 42).
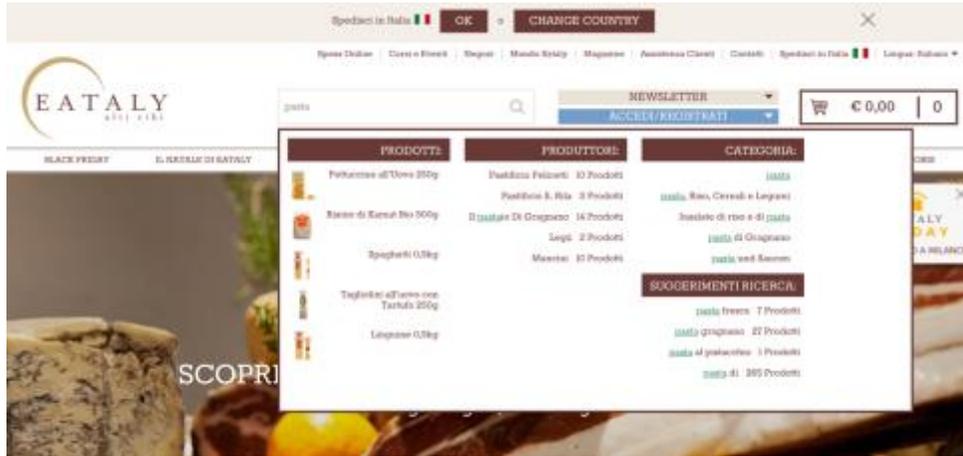
Figure 42: Screenshot of the real time curtain with multiple classification in the EATALY search engine

The worst practice instead, is shown by LAVAZZA, also a food merchant.

LAVAZZA is an Italian company leader in the coffee industry. Even though its product could be considered within the beverage sector, it has been classified among the Food merchants as, the clusters used, have not considered this segment, but just the peculiar *Wine* sector, as it was quite developed in the eChannel.

It scored the weakest results in the mobile *App*, with an overall score of 0,96/5,00.

The 2nd phase (*Product Discovery*) is the most insufficient with just 0,01/1,00 and the overall mean of its performance in this channel is around 0,18/1,00.

SITE ACCESS	PRODUCT DISCOVERY	PRODUCT PRESENTATION	CART MANAGEMENT & CHECK OUT	AFTER SALES
0,21	0,01	0,10	0,35	0,23

Table 5: LAVAZZA performances per phases in the App channel

Evidently, the development of the mobile *App* was not followed by the company in the right way, creating a consistent experience for the customers in line with the *Browser* channel's one or *Mobile's*.

SITE ACCESS	PRODUCT DISCOVERY	PRODUCT PRESENTATION	CART MANAGEMENT & CHECK OUT	AFTER SALES
0,61	0,49	0,51	0,61	0,46

Table 6: LAVAZZA performances per phases in the Browser channel

SITE ACCESS	PRODUCT DISCOVERY	PRODUCT PRESENTATION	CART MANAGEMENT & CHECK OUT	AFTER SALES
0,59	0,58	0,49	0,59	0,47

Table 7: LAVAZZA performances per phases in the Mobile Site channel

The LAVAZZA's results in the other channels indeed, have higher scores as you can see (mean of 0,54/1,00 in the *Browser* and in the *Mobile Site*: Table 6 - 7).
The problem here was the development and the efforts put in place to the creation of the *Mobile App*.

These results want to underline the fact that the implementation of new solutions, made for the users, attacking aggressively a new channel, not always translate the actions undertaken in good results.
The development of new good and responsive solution should be complete and with features at the same level or even better than the previous traditional channel used and it happens with the complete support of the company.
The target for the LAVAZZA is to develop an App more complete and take inspiration from NESPRESSO who scores a mean of 0,56/1,00 in the same channel, offering the same products (results in Table 8 below).

SITE ACCESS	PRODUCT DISCOVERY	PRODUCT PRESENTATION	CART MANAGEMENT & CHECK OUT	AFTER SALES
0,67	0,46	0,43	0,54	0,68

Table 8: NESPRESSO performances per phases in the App channel

Even though the *Food* merchants hold both the results at the two extremes (Best & Worst practice), without any doubt, it's possible to say that anyway it performed better than the other channels as you will see in the next tables. LAVAZZA case indeed, could be considered then, just as an exception to this outstanding performance.

Here, have been displayed the "TOP 5" actors by category in the two principal channels (as before, the *Browser* results have been selected also to represent the Mobile Site performance), their means have been exhibited and also the percentage variations between the results collected in the *App* channel against the Browser's ones.
As you can see from the tables below, that recap the "TOP 5" actors for each cluster, the *Food* reveals its self as the one with the best performances in all the channels. This result was easily predictable also by looking the previous results analysed before.
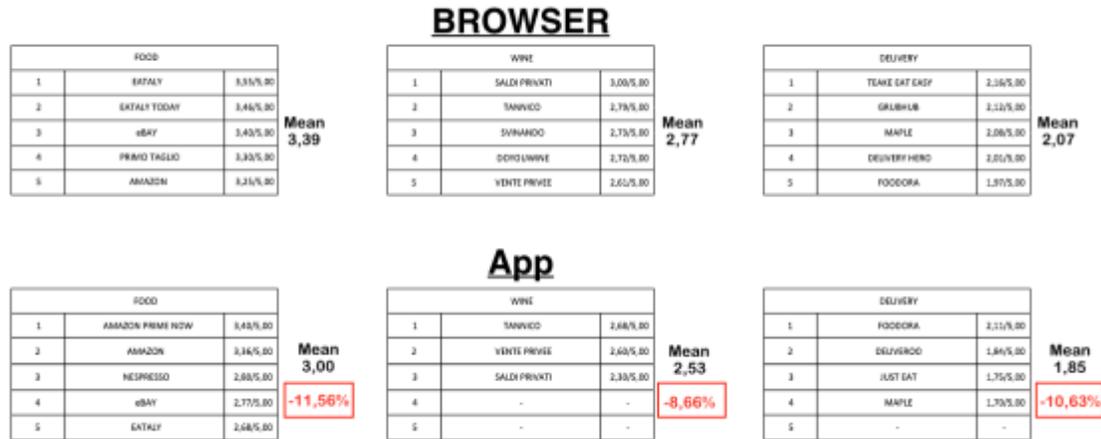
BROWSER

FOOD		
1	EATALY	3,55/5,00
2	EATALY TODAY	3,46/5,00
3	eBAY	3,43/5,00
4	PRIMO TAGLIO	3,30/5,00
5	AMAZON	3,26/5,00

Mean 3,39

WINE		
1	SALDI PRIVATI	3,00/5,00
2	TANNICO	2,79/5,00
3	SVINANDO	2,73/5,00
4	DOROTHWINE	2,72/5,00
5	VENTE PRIVEE	2,61/5,00

Mean 2,77

DELIVERY		
1	TEAKE EAT EASY	2,16/5,00
2	GRUBHUB	2,12/5,00
3	MAPLE	2,06/5,00
4	DELIVERY HERO	2,01/5,00
5	FOODORA	1,97/5,00

Mean 2,07

App

FOOD		
1	AMAZON PRIME NOW	3,43/5,00
2	AMAZON	3,16/5,00
3	NESPRESSO	2,88/5,00
4	eBAY	2,77/5,00
5	EATALY	2,68/5,00

Mean 3,00   -11,56%

WINE		
1	TANNICO	2,68/5,00
2	VENTE PRIVEE	2,63/5,00
3	SALDI PRIVATI	2,30/5,00
4	-	-
5	-	-

Mean 2,53   -8,66%

DELIVERY		
1	FOODORA	2,11/5,00
2	DELIVEROO	1,84/5,00
3	JUST EAT	1,75/5,00
4	MAPLE	1,70/5,00
5	-	-

Mean 1,85   -10,63%

Figure 43: "Top 5" ranking in the Browser and App channel according to typology of merchants

The *Delivery* results highlight that its "TOP 5" players reached results that are always beneath the results of the other channels; this, has been shown to underline the need of more features, and mostly information content, implementation in the *App* channel.
The *Beverage* sector always placed itself in the middle of our ranking in both *Browser* and *App* channels.

Among the analysis of the "TOP 5" ranking, the Browser displayed better results than the App, as almost all the types of merchants suffer due to the introduction in the new *App* channel.
The *App* channel, as displayed in the figure 43, recorded values lower than the other two, with always negative gaps with them. In this case, it's worth also to remember that the latter channel has suffered a lower number of actors taking part in the study, also due to the impossibility to find all the information for some of the international actors.

For what concerns the level of the information, it's a natural result. The amount of information provided by the *App*, normally is lower than the level offered by the *Browser* with the Desktop version of the web page, but these results highlighted that the features developed as "added services" fostered by the particular use of the mobile devices, did not compensate the lack of info.

Thanks to these data, we can confirm the fact that, even with the introduction of the special features developed ad-hoc for the *App* world, the services and information offered by the more traditional channels (*Browser*, *Mobile Site*) are still the wider and the best solution.

In the future, more attention could be played in the development of this channel, strictly related to the future of the eCommerce, sustained by a more intense focus for the peculiar features that could be exploited according to the characteristics of the mobile devices.

There are some cases that show the benefits arisen from the development of mobile app as AMAZON and FOODORA, others the damages as EATALY and SALDI PRIVATI.

AMAZON and FOODORA could improve their previous performances with the launch of their own *Mobile App*, putting efforts, and then improvements, in the development of more attracting and easy-to-use user interface, integrated with the new features implementable by the use of a mobile device.

On the other side, EATALY and SALDI PRIVATI, one Food actor and one Wine actor, that decreased their performances, more than the others, with their entrance in the App channel. The lack of focus and attention is probably one of the causes of these lower results but, anyway, a decreasing trend has been shown along all these channels, as also said before in the analysis of the channels.

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5. CONCLUSIONS AND THOUGHTS

The study made on the literature analysis of the last years, confirms the attraction of the eFood for merchants and customers all over the world. In terms of potentiality, this could be one of the most interesting market to be developed. It started with the wine market that since the first time, has arisen interest for the eCommerce actors and from the wine, the principal marketplaces started also to introduce in their basket of products something outside the common products they commercialize. After the wine, they started to sell also food products, and today some of them have launched experimental services of *Food Delivery* (see AMAZON in the principal American cities).

The fact that also the actors, leaders of the eCommerce, have expressed their interest in the food, putting more efforts in the last years, says it all on the potentiality of the eFood. So, as seen, a fostering effect comes directly from international players, especially from the country considered as leader in this sector.

The literature analysis has highlighted how the USA market is one of the leaders in the digital global context, and from the empirical study, it has been possible to see how this was translated into the introduction of innovative services linked to the world of food by this market.

Considering indeed the food market, some actors selected, introduced the service for the delivery of ingredients linked to specific recipes consulted on the web pages of the merchants, or also, others provided menu, not from restaurants, but directly from the most known chefs. Furthermore, most of them offer a subscription options, automating the process and leave the customer free from the repetition of the same action. This type of merchants is not active on the Italian territory, but they could be developed in the future years.

Talking about Italy, even though it is considered not one of the most important actors in the eCommerce market, it shows a lot of good eFood merchants as also highlighted by the best practice held by EATALY, an Italian grocery actor. The Italian market is still behind the principal ones, but thanks to the wide and well recognized products, both in the Food and in the Wine sectors, it could exploit them to increase the selling in the digital market and then increase its performance and knowledge of the market.

Through the empirical research, it has been revealed that the *Browser* and the *Mobile Site* channels have scored almost the same outstanding performance, in both terms of results and trends according to the different type of merchants along all the CJ. These channels, thanks to the high amount of information and their integration with complete

features that enable a satisfactory customer experience. Their long development along the years, furthermore, could be considered as an element that help them to reach the best results.

Here, then, there is the presence of the best results, with the Best Practice of all the study linked to an Italian *Food* merchant, EATALY.

Another history is connected to the *App* channel, which was the last and the least developed among this study. The number of actors active in this channel is almost half of the number of the players present in the *Browser* and in the *Mobile* site and it underlines how the players in this sectors, especially the Italian ones, are still undeveloped under this channel that represents the future for the eCommerce.

Moreover, the number of mobile *App* actors is conditioned by the impossibility to find all the information for the actors active in others countries. This problem was more evident in the case of the Food Delivery actors, who, otherwise, would be the most present and most aware of the potentiality of this channel.

In the future, a more equilibrate base of merchants should be considered in terms of numbers, balancing the actors between *Browser/Mobile Site* and *App* in order to create and analyse more comparison among the clusters, without having biased results due to the data base.

The fact that the *Food Delivery* actors are more present in the *App* channel, could be seen they have been as the readiest to this type of channel, as the service they offer, is linked to the necessity of the customers to have a ready-to-eat solution that could be more briefly requested with the use of the smartphones.

The other problem here has been the implementation of the merchants' apps as, even though it was characterized by a lower number of actors, it scored results lower than the *Browser* versions of the same merchants. This is the case of LAVAZZA, the worst practice along the study, that was not able to develop a complete app and then to reach results as good as in the other channels.

Linked to the *Food Delivery* merchants, are also the weakest results among the different type of merchants used.

The causes of these results could be linked to the fact that the 2nd and the 3rd phases (*Product Discovery, Product Presentation*), that are certainly important in the CJ, have been not developed as they should be by the *Food Delivery* for the inner nature of these merchants that work as a network facilitator between the final consumers and the restaurants.

They support the promptness and the ease of use of the service while the information and all the product's presentation are of course less developed.

So, essentially, the problem is linked to the lack of images (that constitute a weight of 15% along the 3rd phase) and the level of information of the products (weight of 55% in the 3rd phase) as the origins, the producer and good description that are still critical for the food market.

The fragile results of the *Food Delivery* merchants, affected then also the performance of certain type of cluster.
The study proposed several types of actors: Italian, foreigners, Dot.com, traditional merchants, marketplaces but the results developed from the comparison of these type of merchants has been affected by the presence of all this type of merchants in specific cluster that, then, decrease clearly the output of these comparisons. All the *Food Delivery* merchants indeed, belong to foreigner actors, Dot.com actors and not Marketplace.

The best results, on the antipode, are held by the *Food* merchant group, the one that consider within its category the traditional merchants who have developed later the digital channel after their own traditional network of point of sales, the Dot.com portal that acts like groceries and the actors that sell beverage outside the *Wine* category.
They have been able to balance in sustaining way both level of information and the features sought by the digital users. They impose themselves along all the channels in terms of scores in each phase and also in term of balance through the 5 phases considered. They produce a good amount of information according to ingredients, origins, description, producer's description, recipes and cooking or wine combination hints.

Similar results are shown also in the *Wine* sector, that embrace just that type of actors strictly and only related to the wine world. They score performances real close to the *Food*'s ones, but looking to the different performances held in the different phases, this cluster reveals itself more volatile than the Food group.

It was very difficult though to keep the same performances along all the phases and an overall general look to the results demonstrate that in the eFood actors suffer in the central phases of the CJ, i.e. the *Product Discovery* and *Product Presentation*. The *Food* merchants have lost less than the other two groups, but these two phases are still the most critical phases for all the merchants. It could be interesting to understand how the other markets (Books, Media, Fashion, Groceries, etc.) perform along the CJ, looking if they experience the same problems in the phases and how the eFood rank itself among the other markets. The best phases then, have been the 1st (*Site Access*) and the 5th (*After Sales*) where the actors, seemed more prepared with complete panel of features and services offered to the users.

The introduction of the peculiar elements, which were not considered in the first results, helped the different merchants in the phases they care the most. Information and *Product Description* for *Food* and *Wine* clusters, and moments of check out for the *Delivery*.

But talking about *Delivery* merchants, they also implemented the first phases with peculiar elements introduced to speed up the process of introduction of the platform.

The lack of images and descriptions of the products, as also the lack of the use of supplementary information, seriously prevent the results of this sector and precisely in that phases, the *Food* and *Wine* actors assumed the most relevant roles.

The delivery management elements are very important factors introduced here, but the initial base, common to all the three typologies of actors, was already good for this sector. For this reason, the introduction of supplementary features didn't help so much these type of merchants (*Delivery*).

The *Delivery* merchants are the most recent developed sector, and with the ideas coming from the US market, i.e. Recipes and chef menu providers, they could be the ones that could receive more attention in the future.

Finally, it's worth to say that for what concerns the Italian market, the eFood market could be more exploited in the next years, using the outstanding quality of the Italian products to export outside the national borders, taking example from platform developed by the most performant markets in the digital channels. The wine already started to be commercialized at a global level with the introduction in this specific segment of the marketplace, then it could happen with the food always keeping attention to cover in a comprehensive way all the CJ phases.

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