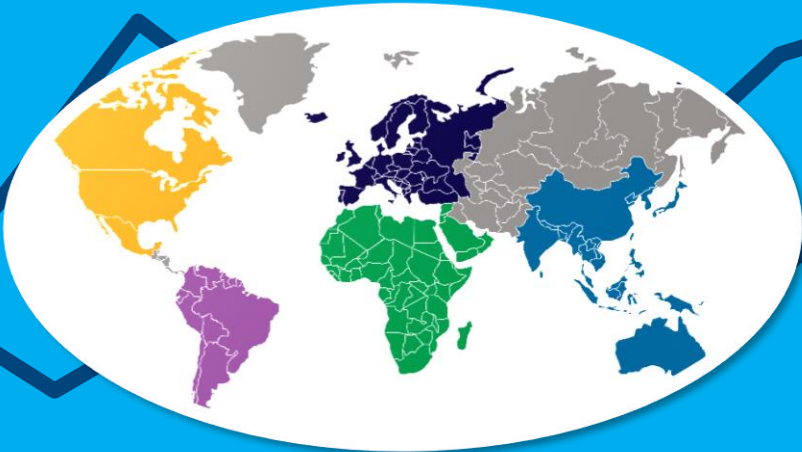


Light Version

Global B2C E-commerce Report 2015

Facts, Figures, Infographics & Trends of 2014 and the 2015 Forecasts of the Global B2C E-commerce Market of Goods and Services



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Global B2C E-commerce Report 2015

Colophon

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Raadhuisstraat 22
1016 DE Amsterdam - the Netherlands



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Global B2C E-commerce Reports 2015

Preface

Online retail has been booming over the last few years. At \$1.9 trillion, global B2C e-commerce sales of goods and services nearly doubled in 2014 in comparison with 2011. In addition, the share of e-commerce in the Gross Domestic Product increased from 1.47% to 2.64% over the same period, showing that the role of e-commerce is growing exponentially within the global economy. And all signs indicate that this growth will continue over the next few years.

As national borders continue to fade because of the Internet, cross-border e-commerce is becoming more and more important. It forms an interesting method for companies to increase their business volume, as they are able to attract customers from other countries. Still, companies that want to sell goods and/or services in other countries than their own are often faced with several challenges and burdens. For instance, each country has its own tax, legal and customs regulations in place, complicating cross-border trading.

The Ecommerce Foundation strives to assist companies that have the ambition to sell goods and/or services cross-border in overcoming these challenges. It does so by providing them with the necessary information by means of reports, benchmarks, studies and publications that cannot be realized on a national or individual basis.

The Ecommerce Foundation's B2C E-commerce Reports are an excellent example of this as they offer readers detailed, accurate and relevant information about e-commerce and other economic subjects in countries

from all over the world. Their content includes figures that are based on the Global Online Measurement Standard for B2C E-Commerce (GOMSEC), interviews with e-commerce experts and clear tables and infographics.

This Global B2C E-commerce Report provides an in-depth look at global B2C e-commerce, as well as a summary of the most important e-commerce markets in the world. More detailed information on these markets can be found in the European and global regional reports, which will be published in the fall of 2015.

Naturally, we could not have realized these reports without the help of others. Therefore we want to use this opportunity to express our gratitude to GlobalCollect|Ingenico, who has enabled us to make our reports widely available, and to GfK for their close cooperation and involvement.

If you would like to receive additional information, purchase reports or become involved with the Ecommerce Foundation, please contact us through our website www.ecommercefoundation.org or by sending an email to info@ecommercefoundation.org.

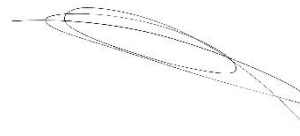
Jorij Abraham



Director Ecommerce Foundation



Richard van Welie



Chief Editor Ecommerce Foundation



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The Ecommerce Foundation is a non-profit organization founded by Ecommerce Europe. It conducts research and studies in the field of e-commerce and provides for benchmarking and reports on e-commerce facts and figures. It also serves as Ecommerce Europe's research institute. In this role, the Ecommerce Foundation was commissioned by Ecommerce Europe to develop the European B2C E-commerce Report and more than forty national e-commerce reports.

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Ecommerce Europe is the association representing 25,000+ companies selling goods and/or services online to consumers in Europe. Founded by leading national e-commerce associations, Ecommerce Europe is the voice of the e-commerce sector in Europe. Its mission is to stimulate cross-border e-commerce through lobbying for better or desired policy, by offering a European platform bringing the European e-commerce sector and other stakeholders together, and by providing in-depth research data about European markets.

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GfK is the trusted source of relevant market and consumer information that enables its clients to make smarter decisions. More than 13,000 market research experts combine their passion with GfK's 80 years of data science experience. By using innovative technologies and data sciences, GfK turns big data into smart data, enabling its clients to improve their competitive edge and enrich consumers' experiences and choices.

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GlobalCollect|Ingenico is the most knowledgeable global Payment Service Provider in the world, processing international e-commerce payments for more than 600 of the world's most recognized e-commerce brands in the digital goods and services, travel, retail and video gaming industries, among many others. GlobalCollect|Ingenico's business intelligence tools, Managed Fraud Services and more than 400 payments experts help our clients elevate their payment strategies to become a strategic asset to their companies.

“Convenience decisive for change and success”

E-commerce beyond pure growth

E-commerce has continued to grow across countries and sectors. While in some market segments the growth in online sales has tended to slow down, the importance of touchpoints across diverse channels during the purchase journey has reached an extremely high level (depending on the category more than 60% of shoppers enjoy multichannel purchasing activities). Retail formats that deliver on this complexity will therefore be more successful in the future.

Globally, online markets for Technical Consumer Goods are very different in terms of maturity. There are countries with very dynamic development, coming from a modest level, like Portugal and Spain (current online share close to 10% and growth about + 30%). On the other hand, there are countries with high growth, where Internet sales are already very well established, like China, Russia and Brazil. More mature markets with a high online share and more modest growth below 15% include Great Britain, France and Germany.

Retail trends

The retail industry is in constant change. According to a recent expert study by GfK, the driver that is currently most influential and is having most impact on the retail scene is **shoppers’ convenience expectation**: a very demanding issue in an increasingly complex retail and shopping environment. One of the keys to achieving a **seamless cross-channel experience** (third-most important driver in the future) is **mobile Internet and communication** (most important future driver).

Retail formats of the future

Marketplaces are in good shape. They seem to meet shoppers’ expectations in terms of convenience and offer. The future of those that provide a variety of

hybrid shopping formats, particularly if they are delivering on a mobile shopping experience, looks promising. Those that focus on only one channel are, however, expected to be less successful.

Shoppers

Shoppers are certainly changing, but some aspects of shopping remain the same. People enjoy it as a social activity and this is particularly true for the younger age group. Still, the social nature of shopping has changed and this must be understood. To an increasing extent it has to do with online socializing.

When identifying a highly attractive future shopper segment – we call them Leading Edge Consumers – the importance of really understanding their needs becomes evident. They expect an even higher level of security for their personal data, but at the same time want websites to track their online behavior and provide individualized offers. This is a challenge for all retailers.

Outlook

The regions of the world are changing at different speeds. Former developing regions have become leaders in some respects – for example, in mobile shopping and payment where Europe is way behind. Retailers need to understand the success factors and the changing needs of individual shopper segments in order to succeed.



Markus Tuschl
Global Director Digital Retail at GfK

“The European Market Changes Constantly”

Key Trends and Best Practices for Cross-border E-commerce in Europe

Europe is mostly a mature e-commerce market, but it changes and evolves constantly. For merchants, there is still plenty of opportunity for growth by expanding into new European markets. Especially the Southern and Eastern European regions include several emerging countries. However, the unique dynamics of the European marketplace do require careful consideration and planning.

While selecting the right payment mix per country is part of the necessary basis for cross-border expansion, merchants should also anticipate and act on macro-trends, such as changes in the regulatory environment, in consumer behavior and in expectations, in order to be successful. In addition, they should actively analyze and optimize their businesses through aggressive fraud management and the application of big data analytics.

Mobile first strategy

In 2014, mobile commerce well and truly arrived in Europe. The use of mobile devices for online shopping and payments is accelerating. In addition, merchants that have adopted the mobile first strategy in both check out and payment pages are seeing considerably higher success rates.

Big data to monitor risks and identify opportunities

Another major trend that further matured in 2014 is the application of big data analytics and visualization in the domain of online payments. E-commerce leaders such as Amazon have been applying big data for years now with the objective of building sophisticated profiles of their consumers for Conversion Rate Optimization (CRO).

Cross-border payments can quickly become very complex and hard to manage. Huge volumes of data need to be analyzed in order to identify issues and opportunities. By applying analytics and visualization to payments data, merchants can track and compare performance per country, per payment method or per time period, and take appropriate steps to optimize processes.

Combating sophisticated fraud

Fraud is a fact of life for merchants. This is particularly true for international merchants, because cross-border payments have significantly higher fraud rates than domestic payments. Increasingly, sophisticated fraudsters also take advantage of the shift to mobile payments, where fraud losses are relatively higher.

However, rather than accepting fraud as a cost of doing cross-border business, merchants should take action to minimize its impact. In addition to improving the bottom line, this also limits the risk of the kind of reputation damages that go hand-in-hand with online fraud.



David Shell
Vice President, Global Marketing and Communications
at GlobalCollect | Ingenico

Global B2C E-commerce

Detailed overview of the Global E-commerce Market



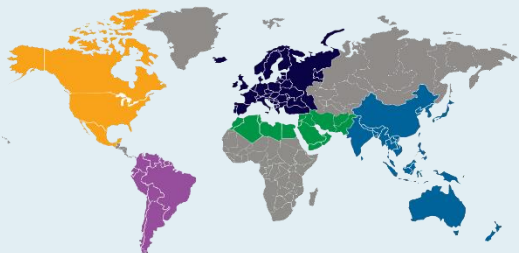
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Asia-Pacific	\$770bn	+44%
Europe	\$567bn	+14%
North America	\$523bn	+12%
Latin America	\$37bn	+18%
MENA	\$21bn	+22%
Others	\$25bn	+24%

Global
\$1,943bn +24%
 Total B2C E-sales of Goods and Services 2014

Cross-border B2C E-commerce

Most popular countries:

	USA	47%
	UK	38%
	China / HK	31%
	Canada	17%
	Australia	16%
	Germany	13%



\$328bn

"309 million consumers bought cross-border last year and this number is expected to grow in 2015"

Top 10 e-commerce countries in turnover (in billions of dollars)

	China	\$538*
	USA	\$483
	UK	\$169
	Japan	\$136
	Germany	\$95
	France	\$75
	Canada	\$28
	Russia	\$27
	Spain	\$22
	Australia	\$21

USA, China and UK account for 61% of total B2C e-commerce sales in the world

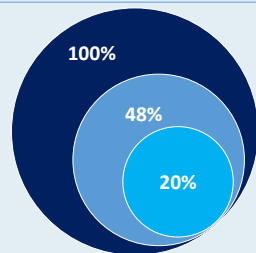
* B2C & C2C goods & services, excluding insurances

Average spending per e-shopper



Share of Internet users accessing the web through a mobile device worldwide

72%



GOMSEC

Global
 Online
 Measurement
 Standard B2C
 E-Commerce

7,223 million people live in the world
2,737 million* people use the Internet
1,139 million* people are e-shoppers
*excluding people aged 0-14

Forecast 2015

\$2,251 bn
 Turnover E-commerce
 Goods & Services

Estimated share of online goods in total retail of goods

5.9%

"2.1 billion active social media accounts worldwide"

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Overview of the Covered Countries

Global B2C E-commerce

Covered countries

This table provides you with some relevant information regarding the countries that are covered in this report.

The countries mentioned in the table are selected for this Global B2C E-commerce Report because they are influential in their regions and are all discussed in brief in this report. For more detailed information about these and other countries, we refer you to our regional reports.



China and India account for more than one third of the world's population

Country	Capital	VAT	Currency	Population
Argentina	Buenos Aires	21.0%	Peso (ARS)	41.8mn
Australia	Sydney	10.0%	Dollar (AUD)	23.5mn
Brazil	Rio de Janeiro	17.0%	Real (BRL)	202.0mn
Canada	Ottawa	5.0%	Dollar (CAD)	35.5mn
Chile	Santiago	19.0%	Peso (CLP)	17.8mn
China	Beijing	17.0%	Yuan (CNY)	1,364.3mn
France	Paris	20.0%	Euro (EUR)	65.8mn
Germany	Berlin	19.0%	Euro (EUR)	80.8mn
India	New Delhi	12.5%	Rupee (INR)	1,267.4mn
Italy	Rome	22.0%	Euro (EUR)	60.8mn
Japan	Tokyo	8.0%	Yen (JPY)	127.1mn
Mexico	Mexico City	16.0%	Peso (MXN)	123.8mn
Russia	Moscow	18.0%	Ruble (RUB)	143.7mn
South Korea	Seoul	10.0%	Won (KRW)	50.4mn
Spain	Madrid	21.0%	Euro (EUR)	46.5mn
United Kingdom	London	20.0%	Pound (GBP)	64.4mn
United States	Washington D.C.	5.0%	Dollar (USD)	318.9mn

Economic Indicators per Region

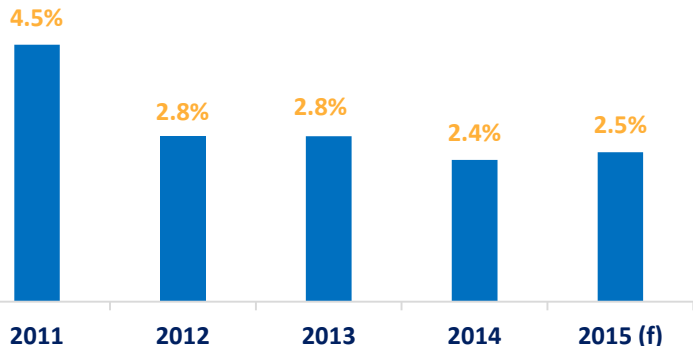
Global B2C E-commerce

GDP real growth rate

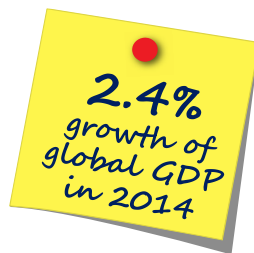
The real growth rate of the **Global Gross Domestic Product (GDP)** was **2.4%** in 2014. This was slightly lower than in the preceding year (**2.8%**). For 2015, the world economy is expected to recover a little, which is reflected in the forecast growth rate of **2.5%**.

GROWTH RATE OF THE GLOBAL GDP

Percentage change, 2011 - 2015



Sources: Ecommerce Foundation, Statista 2015 (1)



eGDP

In terms of the **share of e-commerce in GDP**, Asia-Pacific is the clear frontrunner. Its eGDP rates of **3.3%** is significantly above the global average of **2.6%**.

With an eGDP of **0.8%**, the **Middle East and Northern Africa** and **Latin American** are at the bottom of the list, which indicates that there is a lot to be gained in terms of e-commerce in these regions.

REGIONS IN TERMS OF SHARE eGDP

GDP at market prices and share of e-commerce in GDP of covered countries in report, 2014

Region	GDP at market prices	Share of e-commerce in GDP
Global	\$73,479bn	2.6%
Asia-Pacific*	\$23,215bn	3.3%
North America	\$20,488bn	2.6%
Europe	\$22,663bn	2.5%
Latin America	\$4,494bn	0.8%
Mena	\$2,619bn	0.8%

Sources: Worldbank, Tradingeconomics, Statista, 2015

*The GDP for the major Asian-Pacific economies are actual. The other countries (including Taiwan, Philippines and Thailand) are based on our calculation from the 2012 figures from the Worldbank.

Internet Penetration

Global B2C E-commerce

Internet penetration per region

The average **Internet penetration** in the five global regions slightly increased to **48%** in 2014. This resulted in **2.7 billion people** being connected to the Internet.

At **77%**, **North America** had the highest rate of people with Internet access, followed by **Europe** with **72%**. It is interesting to see that even though **Asia-Pacific** achieved the highest B2C e-commerce sales last year, it also had the lowest Internet penetration. When this rate increases, its e-commerce turnover will grow even more.

INTERNET ACCESS PER REGION

Internet access covered countries and online population, 2014

Regions	Internet access*	Online Population
Regions Total (excl. BRICS)	48%	2,737.1mn
North America	77%	290.4mn
Europa	72%	490.4mn
Latin America	61%	183.9mn
MENA	50%	163.6mn
Asia-Pacific	39%	1,608.9mn
BRICS	39%	913.1mn

Sources: Worldbank, 2015



Internet penetration per country

With regard to the countries covered in this report, the **UK** had the highest Internet penetration; **92%** of its population had access to the Internet in 2014. It was followed by **Japan (91%)** and the **US (87%)**.

Even though **Asia-Pacific** was the region with the lowest Internet penetration, there were three Asian-Pacific countries in the top 10. However, with only **18%** of its **1.3 billion inhabitants** being connected to the web, **India** significantly lowered the region's average. In addition, at **49%**, **China's** Internet penetration was also quite low.

TOP 10 COVERED COUNTRIES ON BASIS OF INTERNET PENETRATION

Internet penetration and online population, 2014

Countries	Internet penetration	Online population
Top 10 countries	84%	719.8mn
United Kingdom	92%	48.7mn
Japan	91%	100.0mn
USA	87%	224.6mn
Canada	87%	26.2mn
Germany	86%	60.3mn
Australia	85%	16.3mn
South Korea	84%	36.5mn
France	84%	44.8mn
Spain	76%	30.0mn
Chile	72%	10.2mn

Sources: Worldbank, Internetlivestats, Eurostat, Ecommerce Foundation, 2015

*share of total population

Population and Households

Global B2C E-commerce

Population per region

The table below provides an overview of the **global regions** in terms of **population**. **Asia-Pacific** is clearly in the lead in this regard, with a total population of **5.1 billion people**. This is mainly due to the presence of China and India, which together account for more than one third of the world's population. When we look at the other continents, **Europe** ranked second with **817.5 million inhabitants**, followed by **North America (478.2 million)**.

REGIONS IN TERMS OF TOTAL POPULATION

Total population and number of households, 2014

Regions	Total population	Number of households
Regions total (excl. BRICS)	7,222.6mn	2,210.8mn
Asia-Pacific	5,095.5mn	1,512.1mn
BRICS	3,031.5mn	897.0mn
Europe	817.5mn	331.7mn
N. America	478.2mn	167.6mn
MENA	437.8mn	82.5mn
L. America	393.6mn	116.8mn

Sources: Worldbank, Ecommerce Foundation, 2015

Population per country

With **1.4 billion** inhabitants, **China** was the leader with regard to population in 2014. It was closely followed by **India**, which had a total of **1.3 billion** inhabitants. It is expected that India will surpass China around 2025.

The gap between these two nations and the other countries is considerable. The **United States** ranked third with **318.9 million** inhabitants, while **Indonesia (252.8 million)** and **Brazil (202.0 million)** completed the top 5.

TOP 10 COUNTRIES IN TERMS OF TOTAL POPULATION

Total population and number of households, 2014

Countries	Total population	Number of Households
Top 10	3,946.6mn	1232.1mn
China	1,364.3mn	454.8mn
India	1,267.4mn	311.4mn
USA	318.9mn	121.2mn
Indonesia	252.8mn	67.2mn
Brazil	202.0mn	64.1mn
Russia	143.7mn	56.4mn
Japan	127.1mn	54.3mn
Mexico	123.8mn	32.3mn
Germany	80.8mn	40.4mn
France	65.8mn	29.9mn

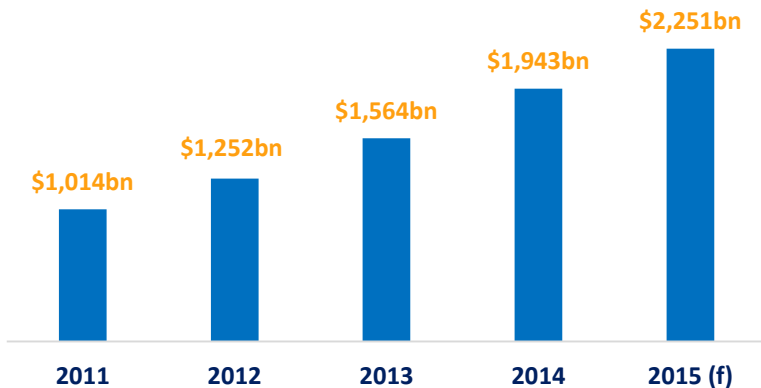
Sources: Worldbank, Internetlivestats.com, Eurostat, Generator Research, Ecommerce Foundation, 2015

Growth in Global B2C E-commerce Sales

Global B2C E-commerce

GLOBAL B2C E-COMMERCE SALES

Total online sales of goods and services of countries covered, 2011 - 2015



Source: Emarketer, Ecommerce Foundation, 2015



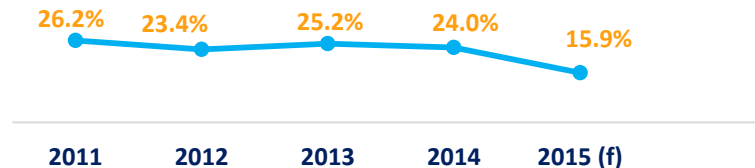
Growth

Global B2C e-commerce sales have increased steadily since 2010. In addition, the growth rate has been quite consistent over the last few years, as shown in the graph below.

However, this trend is not expected to continue in 2015, as a growth rate of **15.9%** is forecast, resulting in a global B2C e-commerce turnover of **\$2,251bn**. Even though this growth rate is still significant, its decrease can be seen as a first sign of the global B2C e-commerce market becoming more and more mature.

GLOBAL B2C E-COMMERCE GROWTH RATE

Percentage change in B2C e-commerce turnover of countries covered, 2011 - 2015



Source: Ecommerce Foundation, 2015

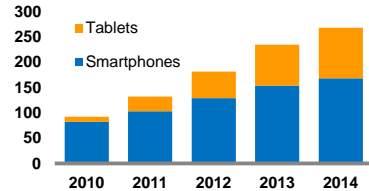
Usage of Smartphones and Tablets

Global B2C E-commerce

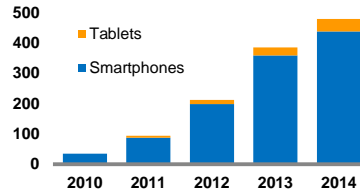
TABLETS AND SMARTPHONES

Overview of usage of mobile devices per region, in millions of US dollars

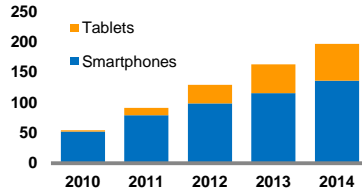
North America



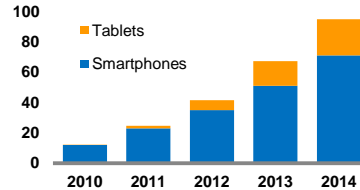
China



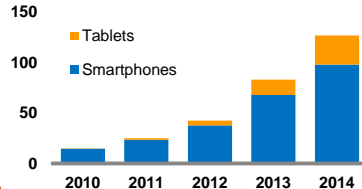
Western Europe



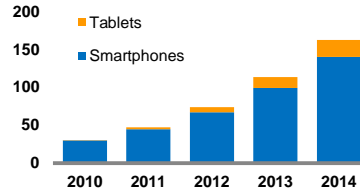
Eastern Europe



Latin America



MENA



Smartphones continue to dominate

When we look at the use of **mobile devices** in global regions, we see that **smartphones** remain the most important mobile device with regard to shopping through the Internet.

Especially in **China** and **MENA**, the popularity of tablets lags behind. However, **Europeans** and **North Americans** are more and more embracing tablets for buying goods and/or services online. This is evident from the growing share of e-commerce turnover made through tablets, which is shown in the tables on the left.

Smartphone sales increased by 48% in the developed world, but by 164% in the emerging countries



Source: Total market including 2014 estimation by GfK Trends and Forecasting

Regional and National B2C E-commerce

Overview of the Regional and National E-commerce Markets



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Legend: Explanatory Notes

Regional and National B2C E-commerce

Country pages

On the following pages, you will find an overview of the most important mature and emerging e-commerce markets in the world. On each page, a country will be covered by means of several figures and graphs, as shown to the right. Here you will find a short explanation of these graphs.

Economic indicators

Through the three economic indicators GDP growth rate, inflation rate and unemployment rate, we want to provide an overview of the economic situation of a country, in comparison with the global averages. The growth rate of the Gross Domestic Product shows how much the size of the country's economy grown, while the inflation rate indicates how much prices have increased in a country. The unemployment rate is the percentage of the labor force without a job.

Share of e-commerce in GDP

The share of e-commerce turnover in the GDP shows the influence of e-commerce in a country's total economy.

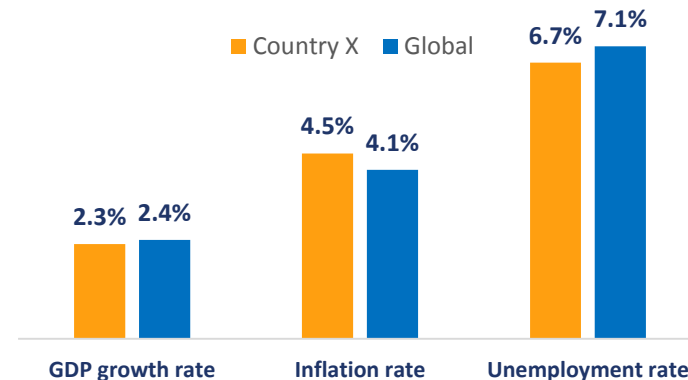
Share of e-shoppers in population

This represents the percentage of online shoppers in the total population, which is an indication of what share of the inhabitants is interested in online shopping.

Share of online spending per e-shopper in GDP per capita

Comparable with the eGDP, but this figure shows how much an e-shopper is on average willing to spend of the GDP per capita, or the size of a country's economy per inhabitant.

Country X vs. Global Averages



National E-commerce Shares



North America

An Overview of E-commerce Markets in North America

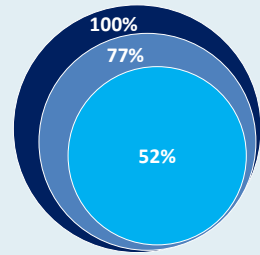
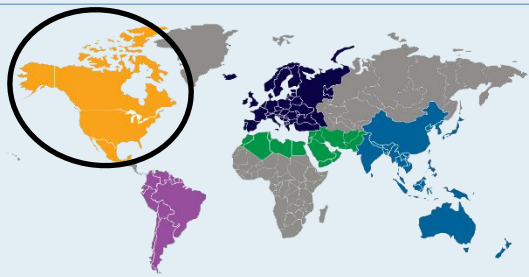


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478 million people live in North America
290 million* people use the Internet
196 million* people are e-shoppers
*excluding people aged 0-14

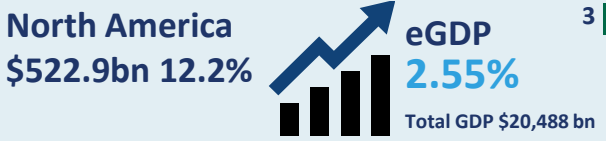
Forecast 2015
\$589bn
 Turnover E-commerce Goods & Services

North America \$522.9 bn +12.2%
 Asia-Pacific \$770.0 bn +44.3%
 Europe \$567.0 bn +13.9%
 Latin America \$37.4 bn +18.2%
 MENA \$21.0 bn +21.5%
Total B2C E-commerce of Goods & Services 2014

Ranking covered countries in turnover (in millions of USD)

- United States \$482,650
- Canada \$27,820
- Mexico \$12,381

4.2% Estimated share of online goods in total retail of goods



133mn e-households



National e-commerce associations:

Canada



United States



Mexico



Average spending per e-shopper




Estimated 64% of active Internet users are on social media




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E-commerce Markets

North America



 36 million
 Dollar (CAD)
 5.0%
(General Sales Tax, GST)



Canada

Even though the US economy is many times larger than the Canadian one, they are still comparable. For instance, their GDP growth, inflation and unemployment rates are nearly similar. In terms of Nationals E-commerce Shares, as well as in average spending per e-shopper, Canada is lagging behind a little. However, the fact that nearly half of all Canadians have purchased something through the Internet indicates that e-commerce is becoming an integral part of Canadian life.

Cultural differences have often been cited among the factors behind the slower progress of Internet shopping in Canada. Another reason is the fact that Canadian companies are in general still reluctant to use the Internet to promote their business.

Gross Domestic Product

\$1.8 trillion

Internet penetration

87%

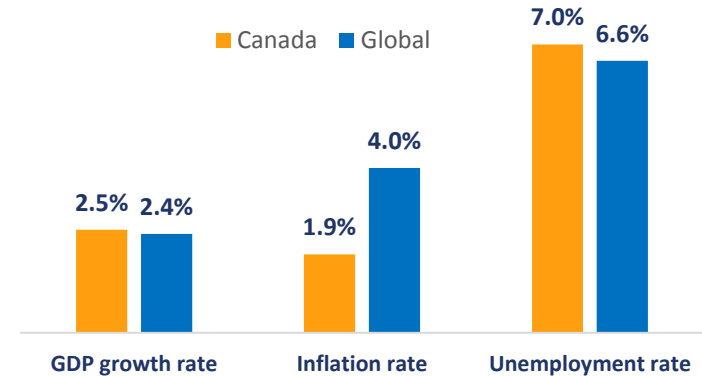
Online population

26 million

Average spending per Canadian e-shopper

\$1,646

Canada vs. Global Averages



National E-commerce Shares



Latin America

An Overview of E-commerce Markets in Latin America

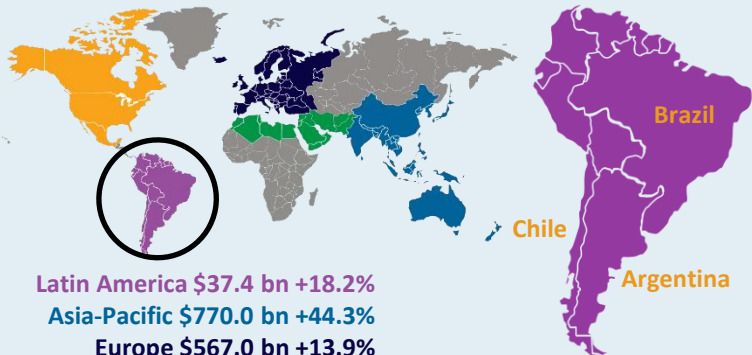


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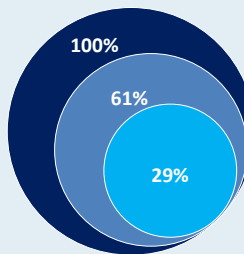
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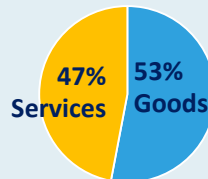


Latin America \$37.4 bn +18.2%
 Asia-Pacific \$770.0 bn +44.3%
 Europe \$567.0 bn +13.9%
 North America \$522.9 bn +12.2%
 MENA \$21.0 bn +21.5%
 Total B2C E-commerce of Goods & Services 2014



394 million people live in Latin America
221 million* people use the Internet
87 million* people are e-shoppers
 *excluding people aged 0-14

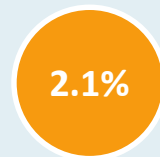
Forecast 2015
\$44bn
 Turnover E-commerce Goods & Services



Ranking covered countries in turnover (in millions of USD)

- | | | | |
|---|--|-----------|----------|
| 1 | | Brazil | \$20,970 |
| 2 | | Argentina | \$4,450 |
| 3 | | Chile | \$2,000 |

Latin America
 \$37.4bn 18.2%



Estimated share of online goods in total retail of goods

Estimated 57% of active Internet users are on social media

National e-commerce associations:

	Brazil	
	Argentina	
	Chili	

Average spending per e-shopper



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E-commerce Markets

Latin America

 18 million

 Peso (CLP)

 19.0%

Gross Domestic Product

\$258 billion

Internet penetration

72%

Online population

10 million

Average spending per
Chilean e-shopper

\$377



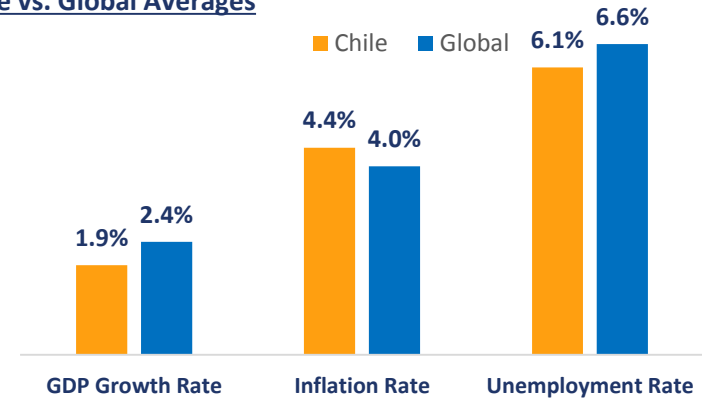
Chile

Chile is a rapidly increasing e-commerce market. In fact, it is ranked first in the Global Retail Development Index, which shows that this country provides a lot of changes for domestic and foreign online and other retailers.

The share of e-commerce in the country's Gross Domestic Product is still quite low, but in line with the other B2C e-commerce markets in the region. However, just as in Argentina, the share of e-shoppers in the Chilean population form a good basis for B2C e-commerce.

The Chilean economy is performing rather well, especially when compared to those of the other two major B2C e-commerce markets in Latin America. In the categories of GDP growth rate, inflation rate and unemployment rate, Chile scores around the global average. As a result, the country is considered one of Latin America's most stable and prosperous nations.

Chile vs. Global Averages



National E-commerce Shares



Europe

An Overview of E-commerce Markets in Europe

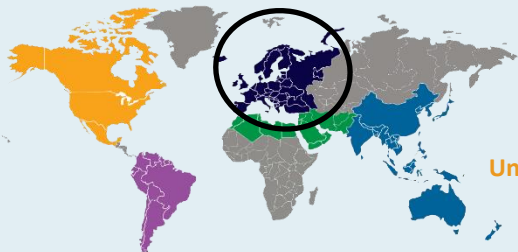


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Europe \$567.0 bn +13.9%
 Asia-Pacific \$770.0 bn +44.3%
 North America \$522.9 bn +12.2%
 Latin America \$37.4 bn +18.2%
 MENA \$21.0 bn +21.5%

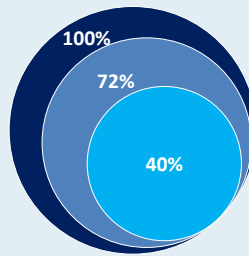
Total B2C E-commerce of Goods & Services 2014

Europe
 \$567.0bn 13.9%



Ranking covered countries in turnover (in millions of USD)

1		United Kingdom	\$168,972
2		Germany	\$94,589
3		France	\$75,459
4		Russia	\$26,500
5		Spain	\$22,452
6		Italy	\$17,640

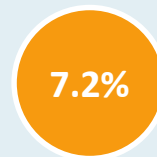


817 million people live in Europe
 490 million* people use the Internet
 274 million* people are e-shoppers
 *excluding people aged 0-14

Forecast 2015
\$639bn
 Turnover E-commerce Goods & Services



244mn e-households



Estimated share of online goods in total retail of goods

National e-commerce associations:

- Germany
- France
- Spain
- Italy

Händlerbund
Handel und Einzelhandel



adigital
Asociación Española de la Economía Digital

netcomm
La Asociación Nacional de Comercio Electrónico

Average spending per e-shopper



“Estimated 56% of active Internet users are on social media”

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47 million



Spain

Just like in several other Southern European countries, the Spanish economy was hit hard by the economic crisis of a few years ago. Slowly but surely, Spain is getting back to its feet, and in 2014 its GDP already grew by 1.4%, which is quite high when compared to other countries in the region. However, the negative inflation rate and the rocketing unemployment rate show that Spain is not yet out of the woods.

B2C e-commerce is clearly becoming more and more important in Spain. Among other things, this is evidenced by the yearly double-digit growth of B2C e-commerce turnover and the fact that the share of e-shoppers in the Spanish population (which excludes people who are aged between 0 and 14) grew significantly over the last few years, from **23.7%** in 2010 to **36.6%** in 2014.



Euro (EUR)



21.0%

Gross Domestic Product

\$1.4 trillion

Internet penetration

76%

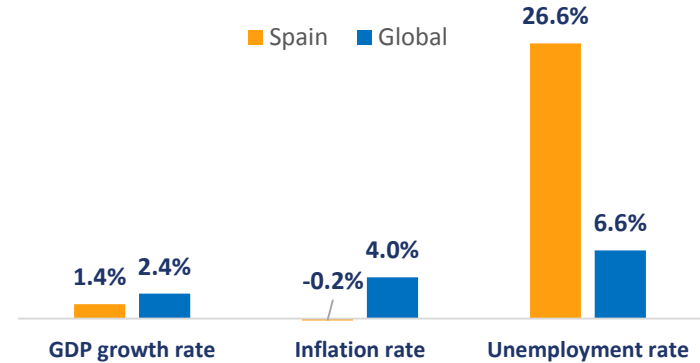
Online population

30 million

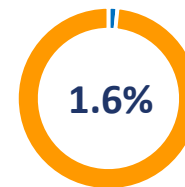
Average spending per Spanish e-shopper

\$1,560

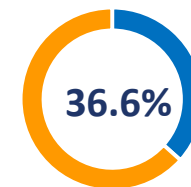
Spain vs. Global Averages



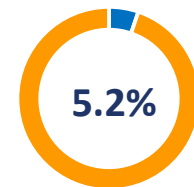
National E-commerce Shares



Share of e-commerce in GDP



Share of e-shoppers in population



Share of online spending per e-shopper in GDP per capita

Asia-Pacific

An Overview of E-commerce Markets in Asia-Pacific

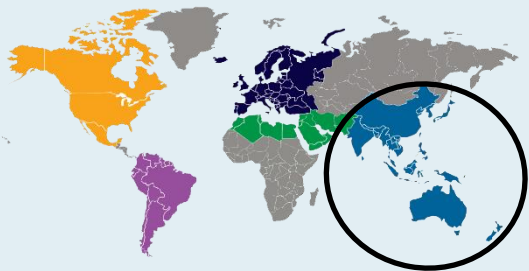


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Asia-Pacific \$770.0 bn +44.3%

Europe \$567.0 bn +13.9%

North America \$522.9 bn +12.2%

Latin America \$37.4 bn +18.2%

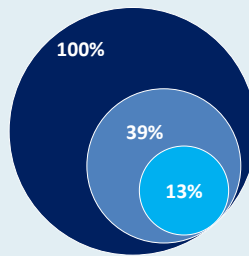
MENA \$21.0 bn +21.5%

Total B2C E-commerce of Goods & Services 2014



Ranking covered Countries in turnover (in millions of USD)

1		China	\$538,128
2		Japan	\$135,507
3		Australia	\$21,000
4		South Korea	\$20,240
5		India	\$19,396
6		Indonesia	\$2,883



5,096 million people live in Asia Pacific

1,608 million* people use the Internet

523 million* people are e-shoppers

*excluding people aged 0-14

Forecast 2015

\$926bn

Turnover E-commerce Goods & Services



Estimated share of online goods in total retail of goods

Asia-Pacific \$770.0bn 44.3%



Total GDP \$23,215 bn



National e-commerce associations:

Australia



China



Japan



India



Average spending per e-shopper



Estimated 53% of active Internet users are on social media

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E-commerce Markets

Asia-Pacific



23 million



Australia

The Australian economy is the 12th-largest in the world and last year, it performed on par with or even a little better than the global averages.

Australian e-commerce developed steadily over the last few years, with an average growth of about 15% per year. However, last year, this rate slightly decreased and this declining trend is expected to continue in 2015. This is an indication that the Australian e-commerce market is becoming more and more mature.

Australians buy a lot from foreign online retailers, partly due to the fact that there are only a relatively small number of domestic players. Another reason to buy cross-border is the fact that the first **US\$861** in purchases made from a foreign retailer may enter the country duty-free as an exemption of the so-called Goods and Services Tax (GST).



Dollar (AUD)



10.0% (Goods and Services Tax, GST)

Gross Domestic Product

\$1.5 trillion

Internet penetration

85%

Online population

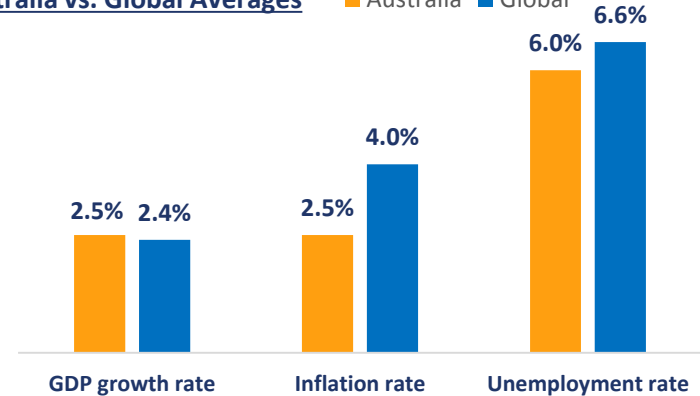
16 million

Average spending per Australian e-shopper

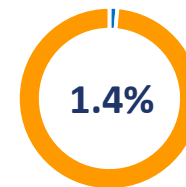
\$1,640

Australia vs. Global Averages

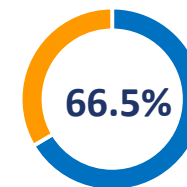
■ Australia ■ Global



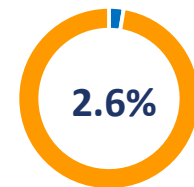
National E-commerce Shares



Share of e-commerce in GDP



Share of e-shoppers in population



Share of online spending per e-shopper in GDP per capita

Trends and Overviews

Trends of B2C Global E-commerce Turnover of Goods & Services and Overview Tables



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Global E-commerce Trends

Trends and Overviews

1. Customers at the center

The number of e-shoppers keeps on growing and is relatively young. They are ready to embrace new digital technologies and devices. As a result, their influence on the sales process increases.

For instance, they will decide where and when they want to receive/collect their package. Due to the continuously increasing offering, companies have to comply with these demands. Otherwise, customers will have no problems with shopping at competitors. Many e-commerce players anticipate this by improving their focus on their customers (customer profiling).

4. Payments

Online and mobile sales also increase due to improved and safer payment methods. In addition, companies can offer their customers a wide variety of methods with they can pay for their order. This way, customers can choose what is most convenient for them.

2. Cross-border e-commerce

More and more people will find their way to foreign online shops for their goods and/or services. In 2014, 309 million people already bought something in an other country. It is expected that this number is going to increase to almost one billion in 2020.

5. Omnichannel commerce

Online and offline commerce will merge, creating trading through multiple channels. More and more brick-and-mortar stores will open online shops in order to survive the competition of e-commerce giants. The other way around, pure players are opening physical stores so that they can provide better service to customers.

3. Mobile commerce

Mobile Internet continues to grow as mobile Internet will be over 50% of all Internet usage by 2015 at the latest. As a result, m-commerce will also become more and more popular. It is expected m-commerce sales will grow from around \$204bn in 2014 to \$626bn in 2018.

6. Social media

The importance of social media grows as many companies also use Facebook, Twitter, etc. for their communications and sales. In addition, consumers can reach many peers in the form of online reviews and blogs.

Advantages and Barriers Regarding E-commerce

Trends and Overviews

Advantages and barriers

Naturally, e-commerce has its advantages in comparison with regular retail, but there are also a few barriers with regard to successfully conducting e-commerce. Below, we provide a number of advantages of online shopping as well as some barriers that may negatively influence e-commerce.

Main advantages of e-commerce:

- e-commerce enables consumers to easily search, compare and review products and stores;
- e-commerce offers consumers a wider competitive selection of goods and services as well as more choice;
- e-commerce enables the search for the best possible prices.

Main barriers regarding e-commerce:

- lack of infrastructure;
- high costs or limitation of usage;
- lack of trust (perceived unsecure payment, privacy issues, return options, etc.);
- trade restrictions (tariffs, trade agreements, high import duties, etc.);
- different legal systems and requirements;
- language barriers;
- political instability, especially in emerging and developing regions of the world.

About Ecommerce Foundation

Information about the Ecommerce Foundation and its Reports



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Ecommerce Foundation

About Ecommerce Foundation

Ecommerce Foundation

The Ecommerce Foundation is an independent **non-profit organization**, founded by Ecommerce Europe and working in partnership with national e-commerce associations worldwide. In addition, the Ecommerce Foundation cooperates with online and omnichannel selling companies from industries such as retail, travel & finance. Its mission is to facilitate the development of **practical knowledge**, insights and learnings **for** which individual **institutions, associations and B2C selling companies** do not have the (financial) resources and/or capabilities.

By combining collective goals and efforts, the Ecommerce Foundation is able to **realize research**, reports, benchmarks and studies that could **not** have been **possible** on an **individual basis**.



Ecommerce Foundation's Research Services

About Ecommerce Foundation



The **Ecommerce Benchmark** allows companies to compare & improve their e-commerce activities.



The **EcommerceWiki** is *the* online e-commerce guide for online retailers, corporate digital experts and students.



E-commerce Reports curates all e-commerce-related research across the globe by adding an editorial board and peer review.



ShoppingTomorrow is a continuous program to help companies look into the future of shopping.



Custom research is done for a diverse set of companies, both co-branded and white labeled.



10 yearly **regional reports**, including **40 country reports**, providing companies with insights on e-commerce.

Information about the Reports

About Ecommerce Foundation

About the reports

This **B2C E-commerce Report** is published **annually** by the **Ecommerce Foundation** and provides overviews of the mature and emerging markets and of the major global statistics in the field of e-commerce.

In addition to this Global B2C E-commerce Report, the Ecommerce Foundation annually publishes 3 global regional reports, which cover **North America**, **Latin America** and **Asia-Pacific**. These include facts, figures, trends and forecasts on the different global regions. In addition to the global reports, the Ecommerce Foundation also publishes an overall European Report and 5 European regional reports, in cooperation with Ecommerce Europe.

Personalized report

It is also possible to have a tailor-made e-commerce report made, completely based on your wishes and requirements. This can be ordered through info@ecommercefoundation.org

Light reports

Ecommerce Europe also publishes light reports, which contain a summary of the full reports. These light reports can be downloaded for free through www.ecommercefoundation.org/reports

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EUROPEAN REGIONAL REPORTS	PRICE
Western European Report Belgium, France, Ireland, Netherlands and United Kingdom	€790*
Central European Report Austria, Czech Republic, Germany, Hungary, Poland and Switzerland	€790*
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Northern European Report Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway and Sweden	€790*
Eastern European Report Romania, Russia and Ukraine	€790*
European B2C E-commerce Report 2014	€1,290*
All European reports (5 regional reports + European Report)	€2,950*

* The European reports are free of charge for all company members and business partners, as well as for the members of our Nationals Associations.

REGIONAL/CONTINENTAL REPORTS	PRICE
North America USA, Mexico and Canada	€790
Latin America Brazil, Argentina and Chile	€790
Asia-Pacific Japan, China, India, Australia, Indonesia, Vietnam and South Korea	€790
MENA region The Middle East and North Africa	€790
BRIC Countries Brazil, Russia, India and China	€790
Global B2C E-commerce Report 2014	€1,290
All-In-One E-commerce Report Package (European and Global Report + 5 European Regional Reports + 5 Regional/Continental Reports)	€4,950

GOMSEC

GOMSEC aims to provide **guidelines for measuring and monitoring B2C e-commerce**. As a result, **all countries worldwide** are able to provide data with respect to the penetration of B2C e-commerce in a standardized way. All Ecommerce Europe figures and estimates are based on GOMSEC, unless stated otherwise. The data and research by GfK is also in accordance with GOMSEC.

The GOMSEC reports on sales figures for the total B2C e-commerce worldwide and for each country separate in the country profiles, **based on total sales of goods and services**.

Total sales of goods and services are based on the **areas/sectors/classification of areas and sectors, as stated on the next few pages**.

All data reported in **the national currency of the country involved** are converted into euros according to **the average (annual) rate of exchange** as provided by, preferably, **the European Central Bank (ECB)** or the **national bank** of the particular country. The reference period that is used for this was from **1 January 2014 to 31 December 2014**. Growth rates are calculated and measured by the B2C e-commerce sales in the national currency.

Definition of B2C e-commerce sales

“Any B2C contract regarding the sale of goods and/or services, fully or partly concluded by a technique for distance communication.”

Technique for distance communication: means that can be used for communication regarding the offer made by the trader and the conclusion of a contract, without the necessity of the consumer and trader being in the same place at the same time.

Contract: a contract whereby use is made, either solely or in part, of one or more techniques for distance communication within the framework of a system organized by the trader for the distance sale of goods and/or services, up to and including the moment that the contract is concluded;

Classification of B2C e-commerce

The following classification in Table 1 provides an overview of areas and sectors included in GOMSEC.

Online purchases of the following items are **excluded from GOMSEC**:

- Transactions between private individuals/ consumers (C2C), such as auctions and marketplaces, and between businesses (B2B)
- Online gambling and gaming
- Cars and other motor vehicles
- Houses and real estate
- Utilities (e.g. water, heating and electricity)
- Mortgages, loans, credit cards and overdrafts
- Savings accounts, funds, stocks&shares and bonds

B2C e-commerce therefore **includes** all online transactions between businesses and consumers using desktop computers, laptops, tablets, smartphones, point-of-sales and smart-wearables, for instance through online shops, physical stores (“online instore”), email, QR codes, catalogue, etc. B2C e-commerce includes Value Added Tax (VAT) or other sales tax, delivery costs and Apps, but excludes returns.

Global Online Measurement Standard for B2C E-commerce (GOMSEC)

About Ecommerce Foundation

Event Tickets
Tickets for concerts and festivals
Tickets for (movie) theaters
Tickets for zoos and amusement parks
Tickets for museums
Tickets for sports games

Fashion	
<i>Clothing</i>	<i>Shoes & Personal lifestyle</i>
Underwear & Upperwear	Shoes
Children's wear	Jewelry, Bijoux, Watches & others
Swimwear & Sportswear	fashion accessories (e.g. sunglasses)
Nightwear & legwear	Bags, wallets, suitcases

Sports & Recreation
Sports hardware (e.g. soccer shoes, tennis rackets)
Bicycles & accessories
Articles for camping and recreation

Toys
Indoor and outdoor toys

Food/Nearfood/Health	
<i>Food/Nearfood</i>	<i>Health & Beauty</i>
Food & Beverages	Personal care & Hygiene
Fresh produce	Baby care
Packaged consumer goods	Perfume
Detergents/household cleaning	OTC
Animal feed	
Tobacco	

Electronics		
<i>Consumer Electronics</i>	<i>Information Technology (IT)</i>	<i>Household Electronics</i>
Photo equipment	IT hardware (PCs, laptops, tablets, etc.)	MDA: air-conditioning, dishwashers, wash machines and other white goods
Audio equipment	Computer Software	
TV/video equipment	Music instruments	
Car electronics (navigation, audio, etc.)	USB sticks, DVD/CD-recordable, ink cartridges, computer accessories	SDA: equipment for personal care, home comfort, kitchen appliances

Global Online Measurement Standard for B2C E-commerce (GOMSEC)

About Ecommerce Foundation

Insurance		
New indemnity, Life and Health Insurances		
Liability insurance	ANW-gap insurance	Health Insurance –
Car insurance	(insurance for receiving a	Base
Fire and theft insurance	payment in addition to a	Health insurance –
	survivor's allowance)	additional
Bike/caravan/motorbike/ Scooter insurance	Annuity insurance	Disability insurance –
	Pension	entrepreneurs
Accident insurance	Life insurance	Disability insurance –
Boat insurance	Funeral insurance	private
Legal assistance insurance	Endowment insurance	Mortgage-related
Home insurance	based on savings	disability insurance
Travel insurance	Endowment insurance	Mixed insurance
(continuous/annual + short	based on investments	(=endowment
term)		insurance + life
Insurance package		insurance)

Telecom
Smartphones, mobile phones & mobile devices
Telefax and answering machines
Headsets & Accessories (mobile) phones
Prepaid cards and tariffs of new phone subscriptions

Travel	
Package Travel	Flight Tickets & Accommodations
Package travel	Flight Tickets
Private transport if booked through a tour operator	Hotel stays
	Apartment/bungalow/camping site
	-> all of the above not booked in combination with other travel-parts

Media & Entertainment
Music (physical, download & streaming)/Spotify based on new subscriptions
Video (DVD, Blu-ray, downloads)
Games hardware & games software
Books & e-books
Apps
New subscriptions newspapers and magazines (no single copy sales)

Others	
Services	Goods
Dating based on new subscriptions	Cars and parts
Other Services	Products for animals
	Flowers & plants
	Optician (excl. sunglasses, hearing aids)
	Adult

Definitions related to the Internet, E-commerce and Online Retailing

About Ecommerce Foundation

- **Broadband access:** the availability of broadband is measured by the percentage of households that are connectable to an exchange that has been converted to support DSL technology, to a cable network upgraded for Internet traffic, or to other broadband technologies. It includes fixed and mobile connections (source: Eurostat)
- **Cross-border e-commerce:** percentage of e-commerce purchased at foreign sites
- **E-commerce (or electronic commerce), a subset of e-business:** any B2C contract on the sale of products or services fully or partly concluded by a technique for distance communication.
- **E-commerce GDP:** total amount of goods and services online divided by the total Gross Domestic Product (GDP).
- **E-households:** number of households that use the Internet for personal gain.
- **E-household expenditure:** expenditure per household that bought goods or services in the past year.
- **Global Online Measurement Standard for B2C E-commerce (GOMSEC):** aims to provide guidelines to measure and monitor B2C e-commerce in order to enable all European countries to provide data with respect to the penetration of B2C e-commerce in a standardized way.
- **Gross Merchandise Volume:** the total sales facilitated by a third party, such as a market place.
- **E-services or electronic services:** “Deeds, efforts or performances whose delivery is mediated by information technology. Such e-service includes the service element of e-retailing, customer support, and service delivery.” This definition reflects three main components: service providers, service receivers and the channels of service delivery (i.e. technology). (Jennifer Rowley, Professor Information and Communications, Manchester Metropolitan University, UK)
- **Inactive online population:** users that have access to the Internet but have not (yet) purchased goods or services online in the past year.
- **Market place:** online platform on which companies (and consumers) sell goods and/or services
- **Mobile commerce (or m-commerce):** the ability to conduct commerce using a mobile device e.g. a mobile phone, a PDA, a smartphone, a tablet or other (emerging) mobile equipment.
- **Mobile subscriptions:** mobile cellular telephone subscriptions are subscriptions to a public mobile telephone service using cellular technology, which provide access to the public switched telephone network. Post-paid and prepaid subscriptions are included (source: Eurostat)

Definitions related to the Internet, E-commerce and Online Retailing

About Ecommerce Foundation

- **Online buyer (or e-shopper, E-buyer):** an individual who regularly bought or ordered goods or services through the Internet.
- **Online expenditure:** spending per user who purchased goods or services online.
- **Online Retail (or e-retail, electronic retail or retailing or even e-tailing):** the selling of retail goods and services on the Internet. In the limited sense of the word, sectors such as online leisure travel, event tickets, downloading music or software are not included. Online-only retail shops are often referred to as pure players.
- **Penetration levels:** the percentage of a population using the Internet, mobile phones, smartphones or tablet devices.
- **Real economic growth rate:** A measure of economic growth from one period to another expressed as a percentage and adjusted for inflation. The real economic growth rate is a measure of the rate of change that a nation's gross domestic product (GDP) experiences from one year to another.
- **Retail sales:** the selling of mainly goods from businesses to individuals from a traditional or so-called bricks-and-mortar shop.

Methodology , Acknowledgements and Sources

About Ecommerce Foundation

This report could only be realized by consulting a great many sources, available in various countries and regions in Europe and around the globe. The wide variety of sources include public domain publications, blogs, websites, industry and financial specialist publications, regional and local news, annual reports, and press releases.

Sometimes the information sources are contradictory and sometimes different figures and data were given by varying sources within the same country, for example due to different definitions. In our reports and country profiles we have mentioned the different sources, definitions and outcomes of such reports, studies and interpretations.

This report is meant solely for use by the recipient and is not for circulation. It is based on information that we consider reliable, but we cannot vouch for it being accurate or complete, nor should it be relied upon as such. Opinions expressed are our current opinions as of the date of this report.

The sources consulted include:

(Inter)national Associations

- ACEPI (Portugal)
- Adigital (Spain)
- Apec (Czech Republic)
- BeCommerce (Belgium)
- Ecommerce Europe
- eCommerce Finland (Finland)
- E-Commerce Polska (Poland)
- FDIH (Denmark)
- FEVAD (France)
- GRECA (Greece)
- Händlerbund e.V. (Germany)
- KAUPPA (Finland)
- National Retail Federation (USA)
- Netcomm (Italy)
- Netcomm Suisse (Switzerland)
- NORA (Australia)
- Retail Excellence (Ireland)
- Shop.org (USA)
- SzEK.org (Hungary)
- Thuiswinkel.org (Netherlands)
- Virke (Norway)

Corporate sources

- A.T. Kearney
- Deloitte
- Facebook
- Forrester
- GfK
- Google
- Hybris
- Innopay
- Planet Retail
- Salesupply
- Social Bakers
- Twitter
- TNS NIPO
- I-Research
- TWS Global
- Data insight
- EWDN

Publications

- eMarketer
- E-commercefacts.com
- Eurostat
- Internet Retailing
- Tribes.no
- Digitaleastfactor.com
- Euromonitor.com

Other sources

- Digital Hub Development Agency (DHDA)
- European Commission
- Eurostat
- European Central Bank (ECB)
- European Banking Association (EBA Clearing)
- International Monetary Fund (IMF)
- International Telecommunications Union (ITU)
- Internetworldstats
- National Statistics offices
- The Heritage Foundation
- United Nations (UN)
- CIA: World Factbook
- World Economic Forum
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- Ystats.com
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- About-payments.com
- The Modern Spice Routes (PayPal)
- Statista

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About Ecommerce Foundation



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Global B2C E-commerce Report 2015



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