European B2C E-commerce Report 2014

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Ecommerce Europe association data at a glance 2014

Europe
€ 363.1 bn +16.3%
EU28
€ 317.9 bn +14.7%

Positioning papers
1. e-Regulations
2. e-Privacy & Transparency
3. e-Payments
4. e-Identification & Trust Services
5. e-logistics

European Reports
Reports include country profiles, trends & Infographics.

816 million people live in Europe
565 million people use the Internet
264 million people are e-shoppers

2,150,000+ jobs directly or indirectly via e-commerce

645,000+ estimated online businesses

3.7 bn+ number of parcels sent annually (f)

15+ leading e-commerce associations

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Free download at: https://www.ecommerce-europe.eu/facts-figures/free-downloads
The importance of e-commerce continuous to grow. More and more people buy their products and services online and they do so from various places, such as at home, at work, en route or in the highstreet and sometimes already online in the store. Meanwhile, e-commerce has become a major influence on the European economy. Whereas the European Gross Domestic Product was more than €16.4tn in 2013, the e-GDP accounted for 2.2% of this number. In addition, e-commerce is responsible for the creation of many new jobs and all this makes it a significant economic power in Europe.

Measuring the size and growth of the e-commerce sector in Europe and around the globe is vital for understanding its economic impact and growing contribution. Ecommerce Europe strongly believes that it is with economic facts that messages in support of our industry can be heard. Therefore, we are delighted to present the second edition of the Ecommerce Europe B2C Research Reports. After the initial year, our reports are now an established phenomenon within the European landscape of e-commerce.

In total, Ecommerce Europe annually publishes several reports; five comprehensive regional reports (Western Europe, Northern Europe, Eastern Europe, Southern Europe and Central Europe), a number of global reports and this European report, which includes an overview of the major European markets.

Through the Ecommerce Europe B2C Research Reports we want to share our knowledge with our readers around the world. By means of 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, we provide online retailers and other stakeholders with practical means that can help them to optimize their businesses.

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 all participating national associations and their individual research partners for providing us with the required data and information. We would also like to thank all participating company members, business partners and stakeholders for their involvement. In addition, we are very grateful to the experts across the world who selflessly invested their time and effort to share their insights. And finally, a special word of thanks goes to our sponsors GlobalCollect, Informatica Corp, RichRelevance and Salesupply, who enable us to make the 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 Ecommerce Europe or one of our national associations so that you can receive the reports for free, please contact us via our website www.ecommerce-europe.eu or send us an email at research@ecommerce-europe.eu.

Francois Momboisse
President of Ecommerce Europe

Wijnand Jongen
Chair of the Executive Committee
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<thead>
<tr>
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</tr>
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<tbody>
<tr>
<td>GfK</td>
<td>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.</td>
</tr>
<tr>
<td>GlobalCollect</td>
<td>GlobalCollect 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’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.</td>
</tr>
<tr>
<td>Informatica</td>
<td>Informatica Corporation (Nasdaq:INFA) is the world’s number one independent provider of data integration software. Organizations around the world rely on Informatica to realize their information potential and drive top business imperatives. Informatica Vibe, the industry’s first and only embeddable virtual data machine (VDM), powers the unique “Map Once. Deploy Anywhere.” capabilities of the Informatica Platform. With regard to information technology, Informatica helps wherever possible by delivering the right data in the right way to the right users.</td>
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<tr>
<td>RichRelevance</td>
<td>RichRelevance is the global leader in omni-channel personalization. More than 160 companies in 40 countries use RichRelevance to turn data into actionable insight, which delivers the most relevant experience for consumers as they shop across web, store and mobile. RichRelevance drives more than one billion decisions every day, and has delivered over $8 billion in attributable sales to its clients, which include Target, Marks &amp; Spencer and PriceMinister.</td>
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<tr>
<td>Salesupply</td>
<td>Salesupply is a global e-business services company that enables online retailers to achieve profitable international growth faster, more efficiently and with relatively low costs. Salesupply provides a full range of solutions ranging from research and strategy, to effective localization of online shops, followed by complete operational support, traffic generation and brand management.</td>
</tr>
</tbody>
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E-commerce continues to change the face of retail across Europe. GfK recognizes the importance that e-commerce businesses, retailers, manufacturers, and distribution and transport companies have in 2014. The consumer has more information than ever before and it is a rare customer journey that does not have an element of online at some point in that path; whether that be at the research stage or the final purchase decision.

The share of sales now being made online is increasing across the European market, the growth in smartphones and tablet devices has changed the way people shop and the constant connectivity has seen a shift in shopping time and location. With many purchase journeys starting on a smartphone and being completed on another device, it is imperative that the shopping experience is seamless across multiple devices. With a number of retailers still to develop a mobile-enabled experience, an opportunity is being missed to convert a browser to a buyer.

**Success criteria**
GfK makes use of the latest research techniques to understand each element of the customer journey, from trigger through to final checkout. By looking at each element of the experience and understanding the way it integrates into the bigger picture, we are able to recognize the key criteria that drive success.

By looking at how brands and retailers are perceived by customers and how this perception translates to sales we can show the impact the user’s experience has on the final decision.

As a global business we are able to contextualize the impact shopping habits are having on European e-commerce players. The cross-border nature of global retail as well as the ability to have products and services delivered on a daily basis from all corners of the globe cannot be discounted. Whether there is an opportunity to take advantage of this or a need to create a defensive strategy, GfK has the insight to evaluate all relevant elements.

Understanding what drives or restricts sales and then actually being able to benchmark those sales is going to continue to be important to all online players. In the end, the ability to increase conversion and reduce abandonment is going to come from a clear interpretation of the insights to be derived from the data that exist.

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**“Customer Journeys without an Online Aspect Are Rare”**

The Importance of E-commerce
“The European Market Changes Constantly”
Key Trends and Best Practices for Cross-border E-commerce in Europe

Europe is 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. However, the unique dynamics of the European market place do require careful consideration and planning.

While selecting the right payment mix per country is the necessary basis, successful merchants also anticipate and act on macro-trends, such as changes in the regulatory environment, or in consumer behavior and expectations. At the same time, these merchants 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, with Sweden and the UK in particular matching the global leaders in mobile shopper penetration. In addition, merchants that have adopted the mobile first strategy in both checkout and payment pages are seeing considerably higher success rates.

**Big data to monitor risks and identify opportunities**
Another big trend that is further maturing in 2014 is the application of big data analytics and visualization to 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). And with good reason.

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 higher as a percentage of revenue.

However, rather than accepting fraud as a cost of doing cross-border business, merchants can 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.

**The year of SEPA?**
Finally, 2014 is a watershed year for cross-border payments in the Single Euro Payments Area (SEPA). The goal of SEPA is to create a harmonized payments infrastructure throughout the SEPA countries. This is done through the use of common payment instruments and standards, supported by a regular and accepted legal structure.
A lot is changing in the landscape of e-commerce. For example, the “e” in e-commerce is disappearing. There is no longer a strict separation between online retail and shopping at bricks-and-mortar shops, as all purchases will take place through omnichannel retailing.

By the end of 2013, 36% of in-store purchases were influenced by digital devices, for instance as consumers compared prices through comparison websites or looked for additional information. This number is expected to have increased to around 50% at the end of 2014.

Companies have to be aware of these developments and invest sufficiently in reaching customers through the several touch points. This way, they will be able to create a flawless customer experience, which is very important for attracting and holding on to customers.

Real-time experience
The biggest challenge for companies will be real-time experience. For customers it will not be enough to receive information tomorrow or even later today; they want it right away. In other words, fast anticipation is key. By 2017, customer experience is what buyers are going to use to make purchase decisions. Therefore, only companies that can deliver instant information will be successful.

In order to achieve this, retailers must be able to predict the next purchases of customers. When shoppers are about to make a purchase, merchants should offer enticing product and/or service bundles. In addition, once a purchase has been concluded, customers should later receive recommendations through all channels regarding products and/or services that might be interesting to them.

To be able to do this, the motto of offering the right product to the right customer, in the right place and at the right time should be in the company’s mindset. In addition, it needs to have the proper technology to execute this strategy.

Brand-switching
A final aspect that will be very important in the upcoming years is the apparent lack of brand loyalty. In the US, 75% of the consumers state that they easily switch between brands, and for the rest of the world this rate amounts to 60%. Consumers receive an overload of information and in combination with the total transparency of the markets, buying somewhere else is just one click away. Companies have to deal with this by ensuring that their marketing activities only contain relevant information. Commerce Relevancy is taking omnichannel to the next level for customer experience.
The mature online retail markets are already highly saturated and competition is intense. To make sure that consumers choose, and continue to choose, your product or service over that of your competitors, you have to stand out from the crowd. Naturally, there are numerous way to achieve this, but in my opinion the best way to go is to optimize your personalization.

**Times are a-changing**
When shopping in a brick-and-mortar shop, personalization is a very common aspect. When consumers go to the store, they seek advice from the skilled salesclerk, who is then able to personally help the customer to the best of his or her abilities. However, as shopping has increasingly shifted to the Internet, it has become more difficult for companies to personalize their services.

Still, e-commerce personalization is by no means impossible. On the contrary, as in my opinion it is even vital for a company to survive in this day and age. Unfortunately, it is not possible anymore to match one employee to one customer at a time. Therefore, you will have to find new ways to accomplish personalization in your customer service.

**Possibilities**
What web merchants can do is using the information that online customers leave behind when browsing the Internet, for example for welcoming them back to their site. Also, people like to follow trends and online shop owners should anticipate this by making suggestions based on what is popular at the moment and on the customer’s shopping behavior.

Other possibilities to personalize your website include providing consumers with the opportunity to give feedback, keeping them up to date about their orders, and providing them with aftercare once they made a purchase.

**Advantages**
Personalization makes your customer feel less anonymous, which they will appreciate. As a result they are more inclined to choose your product or service. And, perhaps even more importantly, if they are pleased with the way your company treats them, they will keep coming back to you and probably provide you with very valuable word-of-mouth advertising.

Companies as Amazon and Netflix are the living proof that personalization works. They have used this tool for many years and as a result, their websites think along with customers. Potential buyers are now provided with reasonable suggestions based on previous site visits and purchases. Making their customers feel special is one of the reasons why Amazon and Netflix are so successful nowadays.
In my opinion, cross-border e-commerce is one of the most important current trends in retail. However, many shop owners underestimate the related time-consuming work and the problems that appear when one enters a foreign market.

**Consumer trust is vital**
Companies cannot simply open a website with another extension than that of their home country and expect their proceeds to increase significantly. They have to adapt their business to the country in which they want to introduce their products or services.

For a successful internationalization, your company has to gain the trust of your potential customer. A first step in accomplishing this is generating a high-quality translation of your website into the language of the target country. In this regards, a machine translation, such as through Google Translate, will not suffice as the many errors in your text will actually be offensive to the people you are trying to reach.

**Do your research**
Of course, just a proper translation is not enough. You also need to adapt to the culture of the audience you want to target. What works for Germany does not necessarily have to work for China or Brazil, for instance. Therefore, you will have to investigate, among other things, relevant trust marks, payment options, and laws and regulations. In addition, you should learn how other successful companies operate in that particular country.

As I said before, it is crucial for a foreign company to get the consumers’ trust. Another essential factor in this process is to install a local customer service in your target country. These employees can then deal with customer requests or complaints in the required language and, equally important, in the right time zone. This way, your customers in Latin America or Asia do not have to wait until the business day gets underway in Europe.

**Asian invasion**
Tackling the time difference is becoming increasingly important as intercontinental cross-border selling is one of the latest developments in the field of e-commerce. Especially Asia is a popular market for European companies as more and more Asian enterprises want to do business with our continent. Some people see the Asian invasion on the European market as a threat, and there are some good reasons for this, but I mainly consider this a great opportunity for European companies to increase their market.

Naturally, there are lots of other places in the world for companies to increase their business. The economic importance and power of the United States have been known for quite some time now, but there are also some sleeping giants in the world. Markets like Australia, Brazil and Indonesia contain a lot of possibilities for European companies.
Overview of the European Countries

A Brief Introduction to Europe

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<th>Capital</th>
<th>VAT</th>
<th>Currency</th>
<th>Population</th>
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<td>Italy</td>
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<td>Romania</td>
<td>Bucharest</td>
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<td>New Leu (RON)</td>
<td>20.0mn</td>
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<td>Bratislava</td>
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<td>Slovenia</td>
<td>Ljubljana</td>
<td>22%</td>
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<td>Spain</td>
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<td>United Kingdom</td>
<td>London</td>
<td>20%</td>
<td>Pound (GBP)</td>
<td>63.8mn</td>
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</tr>
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</table>

EU countries
The continent of Europe consists of 47 countries, of which 28 countries are members of the European Union. In the table we provide an overview of the EU members, in alphabetic order. It includes relevant information, such as the currency of each country as well as their respective VAT rates.

Establishment
The European Union is an economic and political partnership between 28 European countries and was created in the aftermath of the Second World War. Initially, it was established to foster economic cooperation, the idea being that countries that trade with one another become economically interdependent and will therefore be more likely to avoid conflict.

Organizations
Today, the EU is the most important collaborative partnership in Europe. The participating countries established a number of organizations for this Union, to which they have transferred a part of their powers. These organizations include the European Parliament, the European Commission, the European Council and the Court of Justice of the European Union.

The cooperation between these members states is characterized by far-reaching economic integration. In 1986, the tariffs between member states were abolished, creating one internal market. In addition, 12 member states decided to introduce one common currency (the euro) in 1998, and later on this Eurozone was expanded to 18 countries.
## Overview of the European Countries

### A Brief Introduction to Europe

<table>
<thead>
<tr>
<th>Country</th>
<th>Capital</th>
<th>VAT</th>
<th>Currency</th>
<th>Population</th>
<th>EU28</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albania</td>
<td>Tirana</td>
<td>20%</td>
<td>Lek (ALL)</td>
<td>2.7mn</td>
<td>Candidate</td>
</tr>
<tr>
<td>Bosnia &amp; Herzegovina</td>
<td>Sarajevo</td>
<td>17%</td>
<td>Mark (BAM)</td>
<td>3.8mn</td>
<td>Candidate</td>
</tr>
<tr>
<td>FYR Macedonia</td>
<td>Skopje</td>
<td>18%</td>
<td>Denar (MKD)</td>
<td>2.0mn</td>
<td>Candidate</td>
</tr>
<tr>
<td>Iceland</td>
<td>Reykjavik</td>
<td>25%</td>
<td>Krona (ISK)</td>
<td>0.3mn</td>
<td>Candidate</td>
</tr>
<tr>
<td>Kosovo</td>
<td>Pristina</td>
<td>16%</td>
<td>Euro (EUR)</td>
<td>1.8mn</td>
<td>Candidate</td>
</tr>
<tr>
<td>Montenegro</td>
<td>Podgorica</td>
<td>19%</td>
<td>Euro (EUR)</td>
<td>0.6mn</td>
<td>Candidate</td>
</tr>
<tr>
<td>Serbia</td>
<td>Belgrade</td>
<td>20%</td>
<td>Dinar (RSD)</td>
<td>7.1mn</td>
<td>Candidate</td>
</tr>
<tr>
<td>Turkey</td>
<td>Ankara</td>
<td>18%</td>
<td>Lira (YTL)</td>
<td>75.6mn</td>
<td>Candidate</td>
</tr>
<tr>
<td>Andorra</td>
<td>Andorra La Vella</td>
<td>9%</td>
<td>Euro (EUR)</td>
<td>76,000</td>
<td>NON-EU28</td>
</tr>
<tr>
<td>Belarus</td>
<td>Minsk</td>
<td>20%</td>
<td>Kuna (HTK)</td>
<td>9.4mn</td>
<td>NON-EU28</td>
</tr>
<tr>
<td>Liechtenstein</td>
<td>Vaduz</td>
<td>8%</td>
<td>Sw. Franc (CHF)</td>
<td>36,000</td>
<td>NON-EU28</td>
</tr>
<tr>
<td>Moldova</td>
<td>Chișinău</td>
<td>20%</td>
<td>Leu (MDL)</td>
<td>3.5mn</td>
<td>NON-EU28</td>
</tr>
<tr>
<td>Monaco</td>
<td>Monaco</td>
<td>19%</td>
<td>Euro (EUR)</td>
<td>36.000</td>
<td>NON-EU28</td>
</tr>
<tr>
<td>Norway</td>
<td>Oslo</td>
<td>25%</td>
<td>Krone (NKK)</td>
<td>5.0mn</td>
<td>NON-EU28</td>
</tr>
<tr>
<td>Russia</td>
<td>Moscow</td>
<td>18%</td>
<td>Ruble (RUB)</td>
<td>143.0mn</td>
<td>NON-EU28</td>
</tr>
<tr>
<td>San Marino</td>
<td>San Marino</td>
<td>0%</td>
<td>Euro (EUR)</td>
<td>33,000</td>
<td>NON-EU28</td>
</tr>
<tr>
<td>Switzerland</td>
<td>Bern</td>
<td>8%</td>
<td>Sw. Franc (CHF)</td>
<td>8.0mn</td>
<td>NON-EU28</td>
</tr>
<tr>
<td>Ukraine</td>
<td>Kiev</td>
<td>20%</td>
<td>Hryvnia (UAH)</td>
<td>45.5mn</td>
<td>NON-EU28</td>
</tr>
<tr>
<td>Vatican City</td>
<td>Vatican City</td>
<td>20%</td>
<td>Euro (EUR)</td>
<td>850</td>
<td>NON-EU28</td>
</tr>
</tbody>
</table>

### Non-EU countries

In total, there are 19 countries that are not (yet) a member of the European Union. Eleven of these countries do not have the intention to become a member at the moment. The remaining eight are in the process of obtaining a membership. Albania, Bosnia & Herzegovina and Kosovo are so-called Potential Candidates, while FYR Macedonia, Iceland, Montenegro, Serbia and Turkey are full candidates. These eight countries are all depicted as Candidates in the table, which also provides relevant information for the 19 non-EU countries.
Impact of E-commerce on the Economy

A Brief Introduction to Europe

**Gross Domestic Product**
The total Gross Domestic Product (GDP) of Europe is estimated to have reached around €16.4 trillion in 2013, of which the GDP of the EU28 was about 80%. Ecommerce Europe estimates the share of the European Internet economy in the GDP at 2.2%, a percentage that is set to double by 2016 and to triple by 2020.

The number of jobs created directly and indirectly by the B2C e-commerce sector is estimated at more than two million in Europe, a figure that will grow with the ongoing increase and penetration of the Internet in society, and the projected growth of (B2C) e-commerce.

**645,250 websites**

According to data received from national e-commerce associations, Ecommerce Europe estimates the number of B2C websites to have grown to 645,250 at the end of 2013, growing at a pace of 15 to 20% per year.

This number is set to grow even more given the growth anticipated in the upcoming markets in the South and the East, where B2C e-commerce is rapidly closing the gap with the more mature markets in Northern, Western and Central Europe.

**3.7 billion parcels sent**

Postal and private operators have reaped the fruits of the impressive growth over the past years of (B2C) e-commerce. Ecommerce Europe estimates the annual number of B2C parcels sent to customers domestically and cross-border to other (European) countries at 3.7 billion, a number that will certainly continue to grow as a result of the increase forecast for B2C e-commerce in Europe.
Global B2C E-commerce in Brief

Highlights of Global E-commerce

More elaborate information on global e-commerce can be found in our Global Reports, which will be published in the fall of 2014.

www.ecommerce-europe.eu
Global 2013 Key B2C E-commerce Data of Goods and Services at a Glance

Top 10 e-commerce countries in turnover (EUR billion)

1. USA € 315.4
2. China € 247.3
3. UK € 107.1
4. Japan € 81.3
5. Germany € 63.4
6. France € 51.1
7. Australia € 26.9
8. Canada € 18.0
9. Russia € 15.5
10. S. Korea € 15.2

* B2C & C2C goods & services, excluding insurances

1. USA
2. China
3. UK

Global

€1,173.5 bn +13.6%
Total B2C e-sales 2013 of goods and services

Cross-border B2C E-commerce

Most popular countries:
USA 45%
UK 37%
China / HK 26%
Canada 18%
Australia 16%
Germany 14%

“94 million consumers buy cross-border and this number is expected to grow in 2014”

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Twitter: @Ecommerce_eu

‘Global B2C E-commerce report will be published in Fall 2014’
B2C E-commerce in Europe

European B2C E-commerce Market of Goods & Services

www.ecommerce-europe.eu
Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance

816 million people live in Europe
565 million people use the Internet
264 million people are e-shoppers

Europe € 363.1 bn 16.3%
EU28 € 317.9 bn 14.7%

2.2% eGDP € 16.4 trn GDP 2013

816 million
people live in Europe
565 million
people use the Internet
264 million
people are e-shoppers

UK, Germany, France, account for 61% of total e-commerce sales in Europe

Top 5 mature e-commerce countries in turnover (million)

<table>
<thead>
<tr>
<th>Country</th>
<th>Turnover (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>107,157</td>
</tr>
<tr>
<td>Germany</td>
<td>63,400</td>
</tr>
<tr>
<td>France</td>
<td>51,100</td>
</tr>
<tr>
<td>Austria</td>
<td>10,970</td>
</tr>
<tr>
<td>Netherlands</td>
<td>10,583</td>
</tr>
</tbody>
</table>

Top emerging countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Turnover (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>15,500</td>
</tr>
<tr>
<td>Spain</td>
<td>14,414</td>
</tr>
<tr>
<td>Italy</td>
<td>11,268</td>
</tr>
<tr>
<td>Poland</td>
<td>5,225</td>
</tr>
</tbody>
</table>

228 million e-households

2.2% eGDP

69% Goods
32% Services
46%
54%

816 million
people live in Europe
565 million
people use the Internet
264 million
people are e-shoppers

2,181,000+ jobs directly or indirectly via e-commerce
645,000+ estimated online businesses
3.7 billion+ number of parcels annually (f)

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Internet Penetration

The average Internet penetration in Europe increased to 74% in 2013. As a result, it grew closer to the EU28 average, which now amounts to 77%.

In the top 10 of European countries in terms of Internet penetration, it is interesting to see that all Scandinavian countries are represented in the top 5.

Eastern and Southern Europe
While this top 10 mainly consists of countries from Western and Northern Europe, the top 5 of the lowest Internet penetration solely comprises countries from the Eastern and Southern European regions.

However, Russia in particular is trying to close the gap. Last year, it significantly increased its Internet penetration, from 48% in 2012 to 59% last year.

### TOP 10 COUNTRIES IN TERMS OF INTERNET PENETRATION
Internet access and online population, 2013

<table>
<thead>
<tr>
<th>Countries</th>
<th>Internet access*</th>
<th>Online Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>74%</td>
<td>600.6mn</td>
</tr>
<tr>
<td>EU28</td>
<td>77%</td>
<td>392.7mn</td>
</tr>
<tr>
<td>Top 10</td>
<td>93%</td>
<td>239.2.2mn</td>
</tr>
<tr>
<td>Norway</td>
<td>96%</td>
<td>4.8mn</td>
</tr>
<tr>
<td>Netherlands</td>
<td>95%</td>
<td>15.8mn</td>
</tr>
<tr>
<td>Denmark</td>
<td>95%</td>
<td>5.3mn</td>
</tr>
<tr>
<td>Sweden</td>
<td>95%</td>
<td>9.1mn</td>
</tr>
<tr>
<td>Finland</td>
<td>92%</td>
<td>4.9mn</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>91%</td>
<td>57.9mn</td>
</tr>
<tr>
<td>Germany</td>
<td>86%</td>
<td>70.5mn</td>
</tr>
<tr>
<td>France</td>
<td>84%</td>
<td>55.1mn</td>
</tr>
<tr>
<td>Belgium</td>
<td>83%</td>
<td>9.2mn</td>
</tr>
<tr>
<td>Switzerland</td>
<td>83%</td>
<td>6.6mn</td>
</tr>
</tbody>
</table>

### TOP 5 LOWEST INTERNET ACCESS
Internet access and online population, 2013

<table>
<thead>
<tr>
<th>Countries</th>
<th>Internet access*</th>
<th>Online Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top 5</td>
<td>53%</td>
<td>157.1mn</td>
</tr>
<tr>
<td>Turkey</td>
<td>46%</td>
<td>34.7mn</td>
</tr>
<tr>
<td>Ukraine</td>
<td>50%</td>
<td>22.7mn</td>
</tr>
<tr>
<td>Romania</td>
<td>55%</td>
<td>11.7mn</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>56%</td>
<td>4.0mn</td>
</tr>
<tr>
<td>Russia</td>
<td>59%</td>
<td>84.0mn</td>
</tr>
</tbody>
</table>

Sources: Worldbank.org / Eurostat, 2014

*share of total population
E-commerce powers

The graph of the European B2C e-commerce market immediately shows the importance of the UK. After all, its market has a share of almost one third of the entire European e-commerce market. In addition, the share of the UK is almost twice as much as all the other countries outside the top 10 combined.

The share of the top 10 countries in the total European B2C e-commerce (worth of €363.1bn) markets is almost 85%. However, within the top 10 the difference between the top 3 and the rest is quite significant. Together, the UK, Germany and France account for 60.9%, while the other seven countries combine for 21.6%.

The differences between the seven smaller markets in the top 10 are almost negligible. The share of number four Russia (4.2%) is only 2.4% larger than that of number ten Finland (1.8%).

Another interesting aspect of this top 10 is that every European region is represented. With three countries each, Western and Central Europe have the most markets in this list. It is followed by Southern Europe (two countries), and Eastern and Northern Europe with one country each.
Sales of Popular Technical Consumer Goods

B2C E-commerce in Europe

Same top categories
When looking at the two diagrams, it is interesting to see that in both Traditional Sales and Internet Sales the same three categories were very popular last year. In both ways, people purchased the most in Information Technology (such as IT hardware and software), Consumer Electronics (such as TVs, audio home systems and Blu-ray players) and Major Domestic Appliances (such as refrigerators, washing machines and dishwashers).

Different ranking
Still, there is a large difference between the Traditional Sales and Internet Sales and that is the division of these categories. When purchasing through the web, consumers purchase most in the Information Technology category (33.0%), followed by Major Domestic Appliances (18.3%) and Consumer Electronics (16.0%). As a result, Information Technology and Consumer Electronics account for more than half of the total online sales.

However, in traditional sales, the difference between the three most popular categories is much smaller. At 23.3%, people purchased most in the Major Domestic Appliances category. Information Technology ranked second with 21.8%, closely followed by Consumer Electronics (21.5%).
An Overview of B2C E-commerce Markets of Goods & Services in Western Europe

www.ecommerce-europe.eu
Western Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance

- **E-commerce GDP**: 3.45%  
  - Total GDP € 5,163 bn

- National e-commerce Associations:
  - Belgium
  - France
  - Ireland
  - Netherlands

- **Average spending per e-shopper**: € 1,864

- **Estimated share of online goods in total retail of goods**: 9.5%

- **161 million** people live in Western Europe

- **142 million** people use the Internet

- **95 million** people are e-shoppers

- **€ 177.7 bn** Turnover E-commerce Goods & Services

- **43.5%** Services

- **56.5%** Goods

- **100%** Estimated 72% of active Internet users are on social media
United Kingdom

The UK is the largest e-commerce market of Europe. In total, the British e-commerce turnover amounted to €107.1bn in 2013. This number is forecast to grow by 11.4% to €127.4bn in 2014.

In total, there were about 41 million e-shoppers in the United Kingdom last year. On average, they each spent €2,613 in 2013, which makes the British Europe’s biggest spenders. This number is also expected to grow, by 14.2% to €2,986.

Top 3 Online Players UK
1. Amazon 16%
2. Tesco 9%
3. eBay 8%

These are the three most important players on the UK’s online market of goods sold to consumers in terms of market share. Other big online sellers are Asos, Argos, Play.com, Next and John Lewis.

Mobile commerce accounted for nearly one third of all online sales in the UK in the fourth quarter of 2013. In addition, about half of all visits to British e-retail sites was made through a smartphone or tablet during that period.

France

French consumers made more than 600 million transactions online during 2013, for a total value of €51.1bn. With 33.8 million active e-consumers, this amounts to an average spending per e-shopper of €1,512.

Despite the worsening economic climate in France, online sales continued to rise in 2013, albeit less strongly than the years before. Whereas e-commerce grew by 24% in 2010, its growth rate was only 13.6% in 2013. This trend is expected to continue since a growth of 12.5% is forecast for 2014.

In France, the number of B2C e-commerce sites is increasing rapidly. In 2013, there were around 138,000 active sites, which represents a growth of 17% compared to the preceding year.

In general, major credit cards are the preferred e-commerce payment methods in France. The most popular method is Carte Bleue (often linked to Visa), followed by MasterCard, American Express and PayPal. Cheques are still fairly often used as the French seem to remain quite traditional and slightly anxious to use new online types of payment.
An Overview of B2C E-commerce Markets of Goods & Services in Central Europe
Central Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance

- **165 million** people live in Central Europe
- **130 million** people use the Internet
- **68 million** people are e-shoppers
- **€ 93.3 bn** Turnover E-commerce Goods & Services
- **41.3%** Services
- **58.7%** Goods

**E-commerce GDP 2.20%**
Total GDP € 4,237 bn

**National e-commerce Associations:**
- Austria
- Czech republic
- Poland
- Switzerland

**Ranking Central Europe in turnover (EUR million)***
1. Germany € 63,400
2. Austria € 10,970
3. Switzerland € 10,200
4. Poland € 5,225
5. Czech Republic € 2,160
6. Hungary € 810
7. Slovakia € 330
8. Slovenia € 180

**Average spending per e-shopper** € 1,379

**57.6 million** e-households

**Estimated share of online goods in total retail of goods** 7.0%

**77.6%** of the population has Internet access

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Switzerland

In 2013, Switzerland had 6.67 million Internet users, which represented a penetration of 83% for a population of eight million people. Between 2009 and 2013, the Swiss B2C e-commerce market almost doubled to reach around €10.2bn. The number of e-shoppers is estimated at 5.7 million in 2013 and on average they each spent around €1,789.

The most frequently purchased online products in Switzerland were from the categories Travel and Hotels, Books and Magazines, Fashion, and Digital Media.

As Switzerland is a relatively expensive country and each Swiss region borders a country with the same official language (France, Italy, Germany or Austria), Swiss e-consumers frequently shop across the border.

In combination with the Swiss tendency to shop cross-border, the non-EU status of Switzerland (and the relating import and currency issues) restricts the development of the Swiss B2C e-commerce market. After all, it is not appealing for foreign companies or consumers to establish themselves or purchase in Switzerland.

Poland

The Polish e-commerce market is booming. Since 2009 its turnover grew each year with about 25%, from €2.5bn to €5.2bn in 2013. For 2014, another large increase is forecast, as this number is expected to reach €6.2bn. As a result, Poland is the fastest growing B2C e-commerce market within the EU.

Even though e-commerce turnover is growing rapidly, Polish consumers are not big online spenders. On average they spent €535 per e-consumer in 2013, which is well below the European average.

In addition, the Internet penetration is quite low compared with other countries in the region. 65% of the Polish population had access to the Internet in 2013, which is the lowest rate in Central Europe. It is interesting to note that over the past few years, this number has stayed practically the same. For 2014, a slight increase to 66% is expected.

Even though the number of mobile subscriptions decreased from 53.6 million to 47.6 million in Poland last year, m-commerce sales still increased by 41%. As a result, the turnover amounted to €242.2mn in 2013.

www.ecommerce-europe.eu
Southern Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance

- **Europe**: €363.1 bn +16.3%
  - **EU 28**: €317.9 bn +14.7%
  - **Southern Europe**: €41 bn +18.9%

- **Total B2C E-commerce 2013 of goods & services**: 59%
- **212 million people live in Southern Europe**
- **125 million people use the Internet**
- **48 million people are e-shoppers**
- **€40.8 bn Turnover E-commerce Goods & Services**

**Average spending per e-shopper**: €842

**Estimated share of online goods in total retail of goods**: 2.3%

**Estimated 72% of active Internet users are on social media**

**Ranking Southern Europe in turnover (EUR million)**

1. **Spain**: €14,414
2. **Italy**: €11,268
3. **Turkey**: €8,930
4. **Greece**: €3,200
5. **Portugal**: €2,600
6. **Croatia**: €240
7. **Cyprus**: €140
8. **Malta**: €25

**E-commerce GDP**: 1.11%
- **Total GDP**: €3,671 bn

**National e-commerce Associations**:
- **Italy**
- **Spain**
- **Greece**

**65% of the population has Internet access**

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Italy

There were about 37.5 million Italians connected to the Internet in 2013, which resulted in an Internet penetration of 61%. This was the second-lowest rate in Southern Europe, with only Turkey scoring lower. For 2014, a penetration of 64% is forecast.

When we look at the division between goods and services sold online, services have become more popular in Italy over the last few years. Just like in 2012, the share of e-services in the total Italian B2C e-commerce turnover amounted to 66%.

Mobile commerce is booming in Italy. Of all mobile phone owners, nearly two thirds had a smartphone late 2013, which represents an increase of 23.5% compared to a year before. Also in terms of m-commerce turnover, Italy made a leap forward, with a growth of 37% to €694.4mn.

With regard to payment methods, online sellers cannot ignore CartaSi, an Italian credit card. It is the most frequently used credit card for online purchases in Italy. CartaSi has a market share of 40% and more than seven million Italians own such a card.

Spain

Spain is the largest e-commerce market in Southern Europe and the fifth largest in the whole of Europe. Even though its growth rate decreased from 18.8% to 11.1%, e-commerce turnover amounted to €14.4bn, which represents more than a third of Southern Europe’s total B2C e-commerce turnover.

In addition, m-commerce is really booming in Spain. The m-commerce turnover was €3.1bn, which is an increase of 22.7% in comparison with 2012.

In Spain, Credit/Debit Cards were the most popular payment method for purchases made online last year. They were followed by PayPal, Cash on Delivery, Prepaid Cards and Bank Transfers.

Amazon expanded its Spanish activities this year, by introducing a clothing store. It is expected that the American B2C e-commerce giant will be a fierce competitor for the current leaders in this industry: Inditex, Privalia and Asos. Amazon already has six million unique users in Spain and is known for its flawless logistics, one of the shortcomings of Spanish companies.
An Overview of B2C E-commerce Markets of Goods & Services in Northern Europe

www.ecommerce-europe.eu
Northern Europe

2013 Key B2C E-commerce Data of Goods and Services at a glance

- 32 million people live in Northern Europe
- 29 million people use the Internet
- 19 million people are e-shoppers
- $35.9 bn Turnover E-commerce Goods & Services

**E-commerce GDP**
- 2.37% Total GDP $1,349 bn

**National e-commerce Associations:**
- Norway
- Denmark
- Finland
- Iceland
- Latvia
- Estonia

**Estimated share of online goods in total retail of goods**
- 7.2%

**Average spending per e-shopper**
- €1,926

**Internet Penetration**
- 88%

**Ranking Northern Europe in turnover (EUR million)**
1. Sweden €8,622
2. Denmark €8,367
3. Norway €7,600
4. Finland €6,500
5. Lithuania €360
6. Iceland €230
7. Latvia €180
8. Estonia €130

**In cooperation with:**
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- globalcollect
- informatica
- richrelevance
- SALES SUPPLY

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**Total B2C Ecommerce 2013 of goods & services**
- Europe €361.1 bn +16.3%
- EU 28 €317.9 bn +14.7%
- Northern Europe €31.9 bn +12.7%
Sweden

E-commerce is on the rise in Sweden. Compared to 2012, online sales increased by 19.4% last year. This is partly due to the country’s high Internet penetration of 95%. An interesting fact here is that the most active e-shoppers can be found in inland municipalities in the north of Sweden.

An estimated 77% of Internet users purchased goods and/or services in the last 12 months. On average, each Swedish online consumer spent €1,232 in 2013, resulting in B2C e-commerce turnover of €8.6bn in 2013.

The categories in which goods were purchased online most were Books and Magazines, Home Electronics, Fashion/Clothing/Shoes, Movies, and Music. In addition, it is interesting to see that Swedes increasingly often buy groceries online. Last year, nearly €250mn was spent online on food products, an increase of 38% compared to 2012.

The potential for m-commerce is clearly present in Sweden. Mobile commerce turnover increased from €103.4mn in 2010 to €834.3mn in 2013, which is an growth of more than 700%. Also for next year a significant increase is expected, as a turnover of €1.2bn is forecast.

Denmark

The average annual online spending per Danish e-shopper was €2,145 in 2013. The amount spent online per household was €3,768 in that year. In both categories, the Danes were among the top countries in Europe.

In Denmark, 89% of the consumers prefer card payments for online purchases. Of these cards, the local Dankort debit card is most frequently used. It is popular among the Danes mostly because it is widely accepted in all parts of the country and its associated costs are relatively low.

The most popular category in terms of items sold online in Denmark is Financial Products and Services. This is quite striking as it is a category that does not often appear in other countries’ lists with items that are best sold online. The other categories comprising the top five are more familiar, i.e. Travel and Cultural Activities, Media and Toys, IT, Telecom and Photo, and Electronics and Appliances.

Mobile commerce is growing rapidly in Denmark. Compared to 2012, m-commerce turnover grew by 36% to €499.2mn last year. For 2014 an increase of 24% is forecast.

Best online selling items in Denmark are:
1. Financial Products and Services
2. Travel and Cultural Activities
3. Film, Music, Books, Games and Toys
4. IT, Telecom and Photo
5. Electronics and Appliances
An Overview of B2C E-commerce Markets of Goods & Services in Eastern Europe
Eastern Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance

248 million people live in Eastern Europe
139 million people use the Internet
34 million people are e-shoppers

€ 19.3 bn Turnover E-commerce Goods & Services

25% Services
75% Goods

Average spending per e-shopper € 572

46 million e-households

Ranking Eastern Europe in turnover (EUR million)
1 Russia € 15,500
2 Ukraine € 1,850
3 Romania € 1,040
4 Bulgaria € 200
# Other countries¹ € 747

Estimated share of online goods in total retail of goods 2.1%

Estimated 40% of active Internet users are on social media

National e-commerce Associations:
Russia
Ukraine

54.4% of the population has Internet access

1 Other countries include: Albania, Belarus, Bosnia & Herzegovina, FYR Macedonia, Moldova, Kosovo, Montenegro and Serbia.

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Eastern Europe has an estimated 139 million Internet users, of whom 34 million are e-shoppers. The region's e-commerce turnover in 2013 reached € 19.3 bn, with 25% coming from services and 75% from goods. The average spending per e-shopper in Eastern Europe is € 572.

The ranking of the top e-commerce countries in Eastern Europe by turnover in 2013 is as follows:
1. Russia - € 15,500
2. Ukraine - € 1,850
3. Romania - € 1,040
4. Bulgaria - € 200

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Overview and Forecast

General Overview Tables and Forecast of B2C European E-commerce Turnover of Goods & Services
## Overview of Online B2C E-commerce Sales Growth

### Overview and Forecast

<table>
<thead>
<tr>
<th>Countries</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014(f)</th>
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<td>Greece</td>
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<tr>
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<td>25.0%</td>
<td>21.1%</td>
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<tr>
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<tr>
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<td>35.5%</td>
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<tr>
<td>Spain</td>
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<td>19.8%</td>
<td>18.8%</td>
<td>11.1%</td>
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<tr>
<td>Norway</td>
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<td>9.4%</td>
<td>8.6%</td>
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<tr>
<td>Netherlands</td>
<td>10.7%</td>
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</tbody>
</table>

Source: Ecommerce Europe, 2014

Based upon online sales growth of goods and services, 2013
About Ecommerce Europe

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Bert Nagelvoort (1977) has been working for Ecommerce Europe since 2013. He is involved in international e-commerce and develops the Ecommerce Europe reports. He studied Business Administration at Radboud University Nijmegen and has a great interest in the international (digital) economy and e-commerce. Previously, he worked as Project Manager in the financial services industry.

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