ECOMMERCE EUROPE

In cooperation with:

EuroCommerce
for retail & wholesale

European Ecommerce Report 2018 Edition

A Word from Ecommerce Europe

Online retail continues its double-digit growth, since the European e-commerce turnover increased by 12.75% to €540 billion in 2017. As European e-commerce association, we are of course delighted to see these figures, as strengthening and fostering online sales in Europe is our mission. This European B2C Ecommerce Report offers great insights into European ecommerce markets and it contains valuable information for companies that want to start cross-border trading in Europe. Therefore, we would like to thank Ecommerce Operations for their hard work in creating this report.

Online shops still face various challenges when selling cross-border in Europe. Ecommerce Europe aims at creating a regulatory framework that can easy the daily activities of online merchants, so that they can increase their sales at all levels, specifically cross-border. To mention a few practical examples of the work done by Ecommerce Europe, we currently advocate for:

- Single, fully harmonized and easily understandable sets of rules in several areas. For example, contract law across the EU is only minimally harmonized. It would be easier for merchants to sell abroad if they could rely on exactly the same rules for legal guarantees and remedies in case of defective products.
- A fair and balanced solution for taxing the digital economy, which can be accepted at global level without creating trade barriers to the EU.
- A balanced approach, based on clear and transparent principles, in regulating the relations between online platforms and the online shops that sell through them.

The European Union is currently legislating on these and other ecommerce related topics. Some proposals will bring for sure positive changes but, at the same time, some others may create unnecessary burdens for online merchants. The role of Ecommerce Europe, via the know-how of our experts, is therefore to advise policymakers on what we believe is best for the industry.

In some cases, and also to avoid over-regulation, solutions should directly come from the industry. For example, Ecommerce Europe is helping create a trusted online environment for consumers, thanks to our industry-led pan-European Trustmark. Next to that, Ecommerce Europe has been developing a harmonized label for parcels, which is supposed to innovate and boost the way packages are delivered.

Finally, in Ecommerce Europe's view, it is also important to think ahead. This is why we are working towards the European elections in 2019 with more concrete recommendations from the industry on how to continue the path towards the elimination of all cross-borders obstacles for online merchants.

François Momboisse
President

Marlene ten Ham
Secretary General

Ecommerce Europe, the European Ecommerce Association

About Ecommerce Europe

Ecommerce Europe is the voice of the European digital commerce sector. Through its 20 national e-commerce associations, Ecommerce Europe represents more than 75,000 companies selling goods and services online to consumers in Europe. European merchants still face difficulties when selling online, specifically cross-border. That is why we act at European level to help legislators create a better framework for online merchants, so that their sales can grow further. We aspire to be the European platform for digital commerce, where the members of national e-commerce associations, direct company members and suppliers can:

- Network and share best practices, exchange information and knowledge on issues concerning their business;
- Work towards promotion, professionalization and self-regulation the digital commerce industry, thanks to projects like our European Trustmark;
- Create better fitted frameworks that can foster online sales at all levels, both domestically and cross-border.

Ecommerce Europe's Public Affairs Activities

Ecommerce Europe represents the interests of online merchants vis-à-vis European legislators. Our advocacy activities focus on four main pillars:

- e-Regulations
- Digital Transactions and Innovation
- e-Logistics
- Trust (Ecommerce Trustmark)

These pillars are translated into four Working Committees that are managed by the Brussels Secretariat. Members of Ecommerce Europe can join the committee meetings to discuss and further develop the positions of the European e-commerce association on a wide range of topics. These meetings are also the occasion to get informed, share best practices and discuss obstacles merchants face in their daily e-commerce operations in several countries.

Ecommerce Europe translates the outcome of the Working Committees into policy recommendations for legislators on how to make it easier for merchants to sell online. At the same time, we translate what comes from the European Union into practical information that can be used by online merchants in their daily activities.

How to get involved?

Ecommerce Europe welcomes national ecommerce associations and companies selling goods and/or services online to consumers as members. Furthermore, we welcome preferred suppliers to the European ecommerce industry and other related organizations (i.e. NGOs, other associations, with a strong affiliation to ecommerce). Members and partners of Ecommerce Europe can benefit from a wide range of services. For instance, they get access to important information about changes impacting their businesses, they can benefit of practical tools (i.e. factsheets, Q&As) to help them comply with new rules, they can influence how EU legislation is drafted, they can share and exchange knowledge with other stakeholders, network with peers and boost their visibility at the events and workshops organized by Ecommerce Europe.

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Ecommerce Europe National Association Members

Belgium

Czech Republic

Denmark

Finland

Hungary

France

Ireland

Greece

Finland

Germany

Italy

Luxembourg

Netherlands

Norway

Poland

Portugal

Spain

Romania

Switzerland

Bulgaria

This year's European Ecommerce Report again offers a unique breadth and depth of analysis of the growing e-commerce market. As the principal organization representing retail and wholesale in Europe, we are proud to support and be associated with this year's report. Growth in e-commerce in Europe remains at double digit figures, and set to continue to grow. Digitalisation has changed the way people buy, and transformed the way our sector does business. This is a process of change and positive disruption which will not stop here, and the coming years will bring new technologies and ways of interacting with consumers which we can only imagine today. What we will need to address collectively with legislative decision-makers is how to continue this positive growth, and keep Europe's global competitiveness in the face of new regulation at EU and national level, while ensuring that consumers are comfortable to embrace the new possibilities which these new technologies offer.

Christian Verschueren
Director-General

Thank you to our partners

Thank you for downloading this report. This report describes both the commercial opportunities, as well as its challenges for the main ecommerce markets in Europe. The rise in online marketplaces is having a huge impact on ecommerce, which makes understanding the European ecommerce landscape even more important per country, as well as across all Europe. While cross-border ecommerce is increasing, there are still many barriers to overcome. We hope this report will help you overcome any challenges in selling online in the European market.

Ecommerce Operations is an independent organization, initiated by worldwide national ecommerce associations, as well as online and omnichannel selling companies. Our **mission** is to **foster global digital trade,** as peace is the natural effect of trade. By facilitating digital commerce, we hope to make the world a slightly better place.

We especially would like to thank our report partners; namely **Ecommerce Europe**, **EuroCommerce**, **Asendia Management, Accenture Interactive, Manhattan Associates, SAP Hybris, Mazars and .shop**. Without their support, this report would not have been created. Moreover, a great amount of gratitude is extended to Ecommerce Europe, the European ecommerce association, for their unending support.

If you like our reports, please visit **www.ecommerceoperations.org/reports** to download our free reports.

Jorij Abraham
Managing Director
Ecommerce Operations

Valued Report Partners

Mazars is an international, integrated and independent organization, specializing in audit, accountancy, advisory, tax and legal services. As of 1st January, 2018, Mazars operates throughout the 86 countries and territories that make up its integrated partnership. Mazars draws upon the expertise of 20,000 women and men led by 980 partners working from 300 offices worldwide. We assist clients of all sizes, from SMEs to mid-caps and global players as well as start-ups and public organizations, at every stage of the development.

Manhattan Associates is a technology leader in supply chain and omnichannel commerce. We unite information across the enterprise, converging front-end sales with back-end supply chain execution.

Manhattan Associates designs, builds and delivers leading edge cloud and on-premises solutions so that across the store, through your network or from your fulfilment center, you are ready to reap the rewards of the omnichannel marketplace.

Accenture Interactive, part of Accenture Digital, helps the world's leading brands transform their customer experiences across the entire customer journey. Through our connected offerings in design, marketing, content and commerce, we create new ways to win in today's experience-led economy. Accenture Interactive is ranked the world's largest digital agency in the latest Ad Age Agency Report.

Asendia is one of the world's top three international mail, shipping and distribution organizations, delivering your packages, parcels and documents to more than 200 destinations across the globe.

Formed as a partnership between La Poste and Swiss Post in 2012, the Asendia business employs more than 2,000 people worldwide, has offices in 15 countries and a global network of delivery partners to get your package where it needs to be, when it needs to get there.

SAP Hybris is a business unit of SAP, providing omnichannel customer engagement and commerce solutions that allow organizations to build up a contextual understanding of their customers in real-time, deliver a more impactful, relevant customer experience and sell more goods, services and digital content across every touch point, channel and device. Through its state-of-the-art customer data management, context driven marketing tools and unified commerce processes, SAP Hybris has helped some of the world's leading organizations to attract, retain and grow a profitable customer base.

.shop is a domain name for ecommerce. Short, meaningful and relevant, .shop allows ecommerce businesses to choose a brandable online address that instantly identifies ecommerce websites to online shoppers around the world. A .shop domain name can also help offline retailers and service providers to be discoverable online. For businesses, .shop domain names are a more powerful marketing tool and can be used to distinguish their corporate website from their online shop, and provide an enhanced user experience for their customers.

Western Europe:
- Netherlands
- Belgium
- United Kingdom
- Luxembourg
- France
- Germany
- Ireland

Northern Europe:
- Denmark
- Finland
- Latvia
- Lithuania
- Estonia
- Iceland
- Sweden
- Norway

Central Europe:
- Czech Republic
- Hungary
- Slovakia
- Switzerland
- Poland
- Slovenia
- Austria

Eastern Europe:
- Macedonia
- Russia
- Bosnia/Herzegovina
- Romania
- Bulgaria
- Serbia
- Ukraine
- Albania

Southern Europe:
- Croatia
- Cyprus
- Greece
- Italy
- Malta
- Portugal
- Turkey
- Spain

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Introduction to Europe

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EUROPE

A Brief Introduction to Europe

In classical Greek mythology, Europa is the name of either a Phoenician princess or of a queen of Crete. The name contains the elements "wide, broad" [and "eye, face hence their composite Europe would mean "wide-gazing" or "broad of aspect"].

Europe covers about 10,180,000 square kilometers (3,930,000 sq mi), or 2% of the Earth's surface (6.8% of land area). Politically, Europe is divided into 47 sovereign states of which the Russian Federation is the largest and most populous. Europe has a total population of approximately 840 million (about 11% of world population) as of 2017.

Greece is the birthplace of Western civilization. The fall of the Western Roman Empire marked the end of ancient history and the beginning of the Middle Ages. Renaissance humanism, exploration, art, and science led to the modern era. From the Age of Discovery , Europe played a predominant role in global affairs. The Industrial Revolution, which began in Great Britain at the end of the 18th century, gave rise to radical economic, cultural, and social change in Western Europe. Both world wars took place for the most part in Europe, contributing to a decline in Western European dominance in world affairs by the mid-20th century as the Soviet Union and the United States took prominence. During the Cold War, Europe was divided along the Iron Curtain between NATO in the west and the Warsaw Pact in the east, until the revolutions of 1989 and fall of the Berlin Wall.

The political map of Europe is substantially derived from the re-organization of Europe, following the Napoleonic Wars in 1815. The prevalent form of government in Europe is parliamentary democracy, in most cases in the form of Republic; in 1815, the prevalent form of government was still the Monarchy. Europe's remaining eleven monarchies are constitutional.

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. In 1986, the tariffs between member states were abolished. Additionally, 12 member states decided to introduce one common currency (the euro) in 1998, and later on this Eurozone was expanded to 19 countries. While the European Union continuously strives the create a uniform (digital) market, it proves a difficult process. Living proof is the decision in 2016 of the United Kingdom to leave the EU.
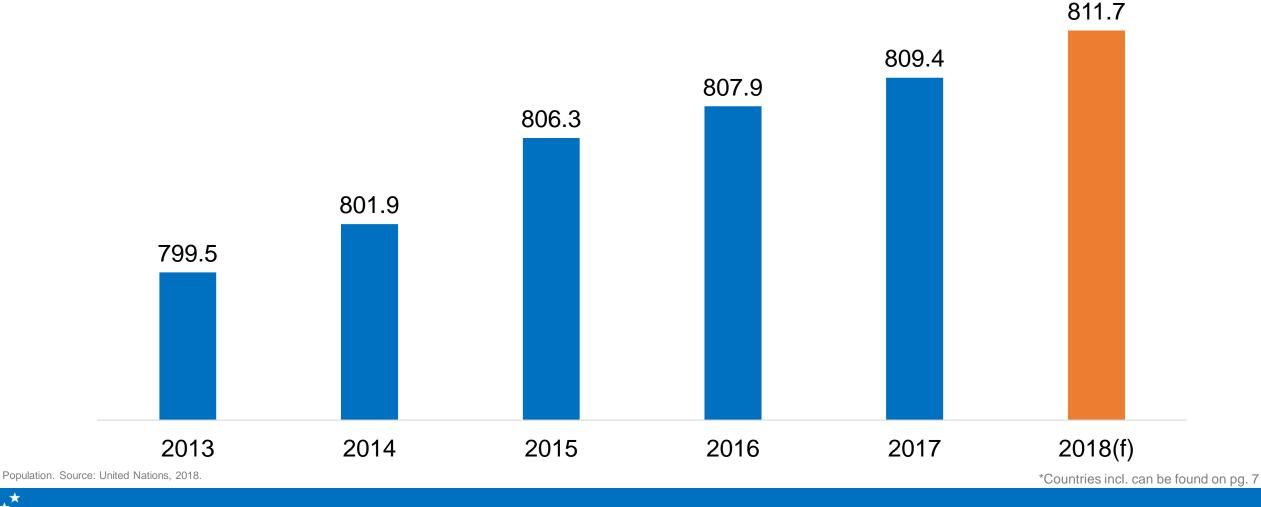
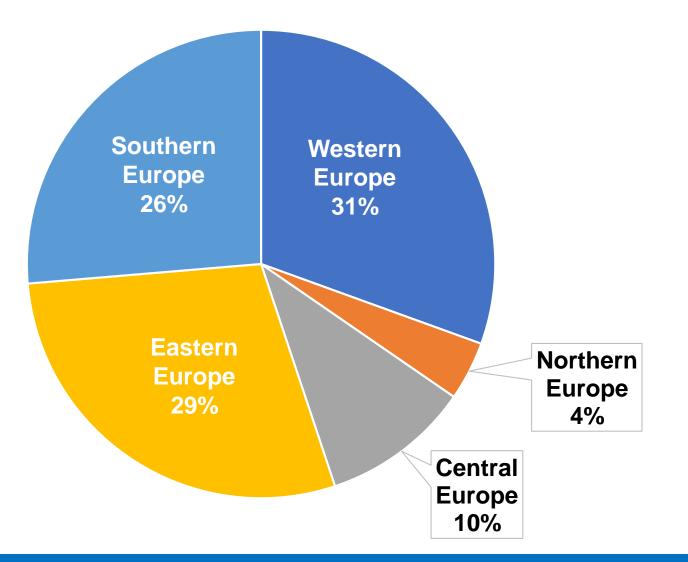Introduction to Europe. Source: Wikipedia; The World Bank; IMF; Ecommerce Foundation, 2015 and 2016

Albania	Greece	Norway
Andorra	Hungary	Poland
Armenia	Iceland	Portugal
Austria	Ireland	Romania
Azerbaijan	Italy	Russia
Belarus	Kazakhstan	San Marino
Belgium	Kosovo	Serbia
Bosnia/Herzegovina	Latvia	Slovakia
Bulgaria	Liechtenstein	Slovenia
Croatia	Lithuania	Spain
Cyprus	Luxembourg	Sweden
Czech Republic	Macedonia	Switzerland
Denmark	Malta	Turkey
Estonia	Moldova	Ukraine
Finland	Monaco	United Kingdom
France	Montenegro	Vatican City
Georgia	Netherlands	
Germany		

Europe's population* continues to increase (millions)

799.5	801.9	806.3	807.9	809.4	811.7
2013	2014	2015	2016	2017	2018(f)

Population. Source: United Nations, 2018.

*Countries incl. can be found on pg. 7

Eastern Europe has the largest population (includes Russia)

Region	2017 Population (in millions)
Western Europe	247,085,743
Northern Europe	32,957,490
Central Europe	83,249,670
Eastern Europe	232,916,476
Southern Europe	232,505,619

- Southern Europe 26%
- Western Europe 31%
- Eastern Europe 29%
- Northern Europe 4%
- Central Europe 10%

2017 European population in millions, per region. Source: United Nations, 2018.

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The 65+ age group is slowly growing in Europe (2017)

16.98%

12.85%
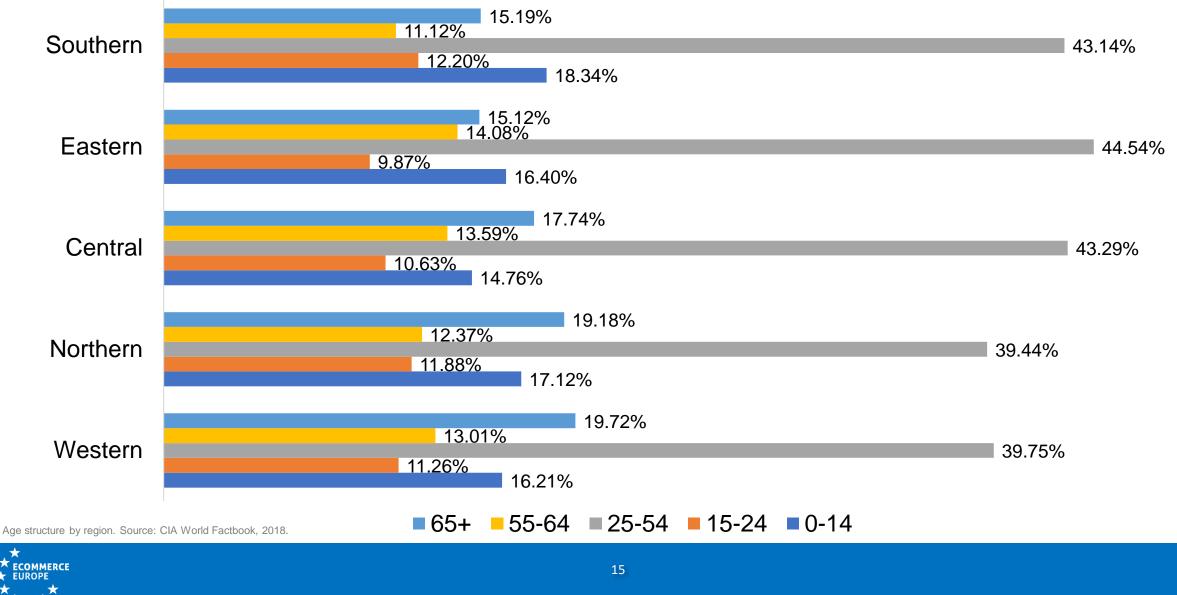
42.37%

11.07%

16.72%

■ 65+   ■ 55-64   ■ 25-54   ■ 15-24   ■ 0-14
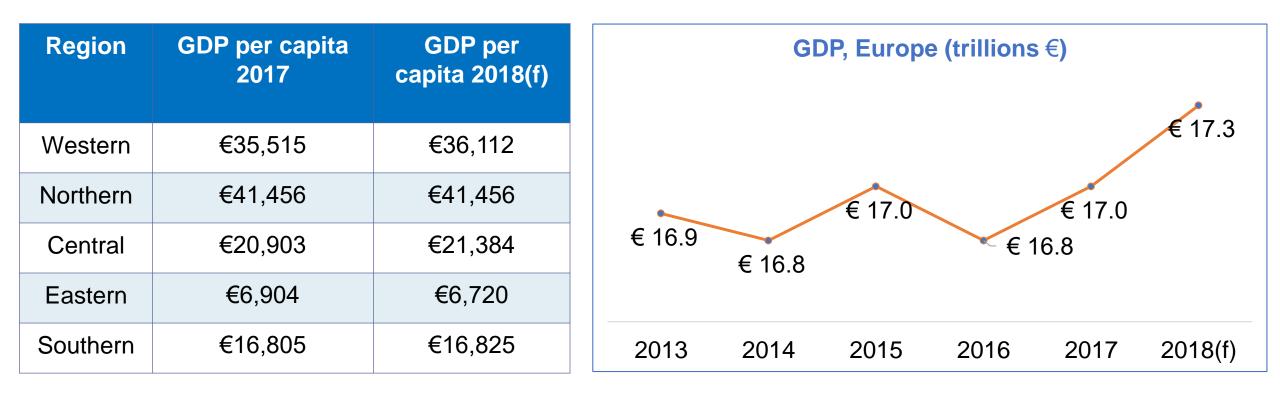
Age structure of Europe, 2018. Source: CIA World Factbook, 2017.

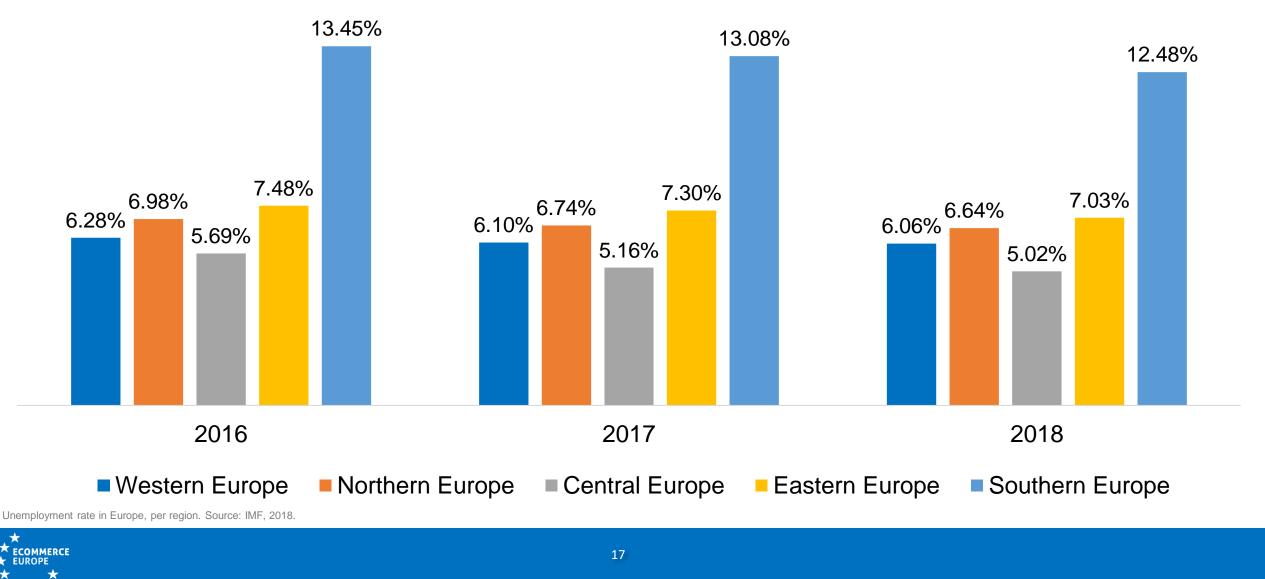# Northern and Central Europe have the oldest populations

Age structure by region. Source: CIA World Factbook, 2018.

Legend: ■ 65+ ■ 55-64 ■ 25-54 ■ 15-24 ■ 0-14

Southern
- 65+: 15.19%
- 55-64: 11.12%
- 25-54: 43.14%
- 15-24: 12.20%
- 0-14: 18.34%

Eastern
- 65+: 15.12%
- 55-64: 14.08%
- 25-54: 44.54%
- 15-24: 9.87%
- 0-14: 16.40%

Central
- 65+: 17.74%
- 55-64: 13.59%
- 25-54: 43.29%
- 15-24: 10.63%
- 0-14: 14.76%

Northern
- 65+: 19.18%
- 55-64: 12.37%
- 25-54: 39.44%
- 15-24: 11.88%
- 0-14: 17.12%

Western
- 65+: 19.72%
- 55-64: 13.01%
- 25-54: 39.75%
- 15-24: 11.26%
- 0-14: 16.21%

GDP of Europe is 17 trillion € and increasing

Region	GDP per capita 2017	GDP per capita 2018(f)
Western	€35,515	€36,112
Northern	€41,456	€41,456
Central	€20,903	€21,384
Eastern	€6,904	€6,720
Southern	€16,805	€16,825

GDP, Europe (trillions €)

€ 16.9

€ 16.8

€ 17.0

€ 16.8

€ 17.0

€ 17.3

2013 2014 2015 2016 2017 2018(f)

GDP in euros, Europe 2013-2018(f). GDP in euros, per capita, per region, 2017 and 2018(f); Source: Quandl, 2018; Ecommerce Foundation, 2017 and 2018.

Unemployment is decreasing throughout Europe

Unemployment rate in Europe, per region. Source: IMF, 2018.

The Logistical Performance differs significantly per country

Logistical Performance Indicators of Europe, per country. Source: World Bank, 2017; United Nations, 2017.

The LPI overall score reflects perceptions of a country's logistics based on, among other things, efficiency of customs clearance process, quality of trade- and transport-related infrastructure and ease quality of logistics services.

Denmark and the UK lead in the Ease of Doing Business rankings

Top 10 ranked European countries*	
Rank	**Country**
3	Denmark
7	United Kingdom
8	Norway
10	Sweden
11	Macedonia, FYR
12	Estonia
13	Finland
16	Lithuania
19	Latvia
20	Germany

Bottom 10 ranked European countries*	
Rank	**Country**
51	Croatia
52	Belgium
53	Cyprus
60	Turkey
63	Luxembourg
65	Albania
67	Greece
76	Ukraine
84	Malta
86	Bosnia and Herzegovina

"A high ease of doing business ranking means the regulatory environment is more favorable for the starting and operation of a local firm. The rankings are determined by sorting the aggregate distance to frontier scores on 10 equal topics."

Ease of Doing Business Index, Europe, per country, 2018. Source: World Bank, 2018.

*Only countries covered in the report are included in the ranking.

ECOMMERCE EUROPE

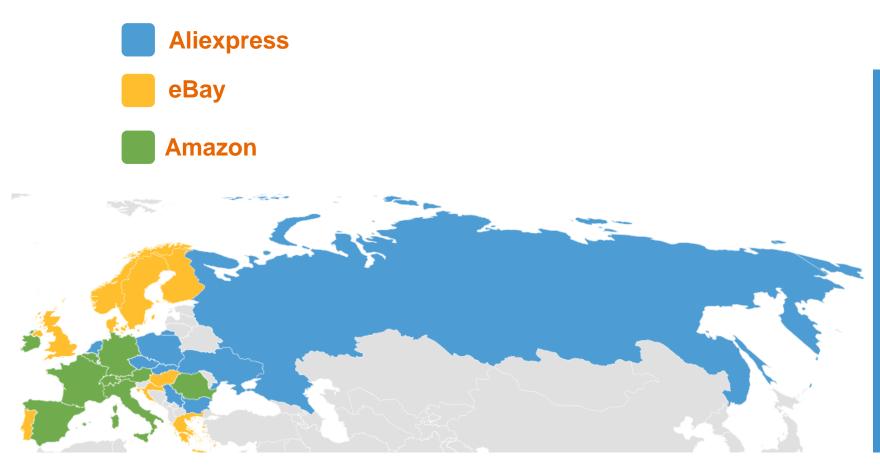# The Rise of Marketplaces

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Viewed from a pan-European perspective we see that brands selling direct and marketplaces factor more highly in the consumer's expectations and experience than do traditional retailers. While retailers remain highly significant in their own markets, we see that pan-European brands rival the in-country giants for impact and performance – we see this trend continuing.

Ian Jindal
Editor in Chief

A Global Overview of the Top Marketplaces

Aliexpress

eBay

Amazon

Distribution of Marketplaces in Europe

Amazon and eBay are dominant in Europe when it comes to their website ranking. Alibaba Group is moving in from the Eastern countries however.

Both Amazon and Alibaba know the value of building a leading ecommerce retailer within a country, and increasing online retail via their platform first and foremost.
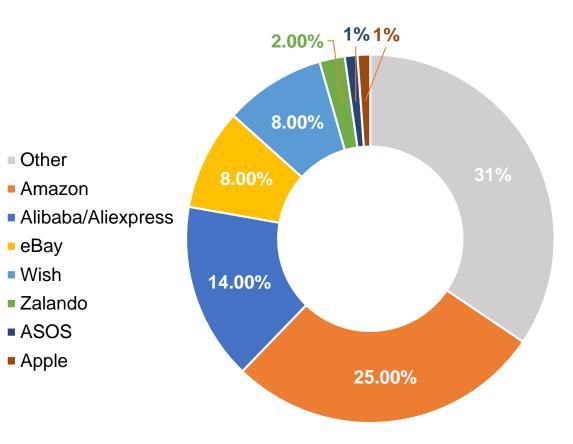
Top marketplace (from chosen three) in each country. Source: SimilarWeb, 2018.

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Globally marketplaces own 56% of cross border ecommerce

- **Amazon is the most popular cross border webshop in Luxembourg (72%) and Austria (64%).**

- **eBay leads in Cyprus (63%).**

- **AliExpress was most popular in Russia (69%) and the Netherlands (35%).**

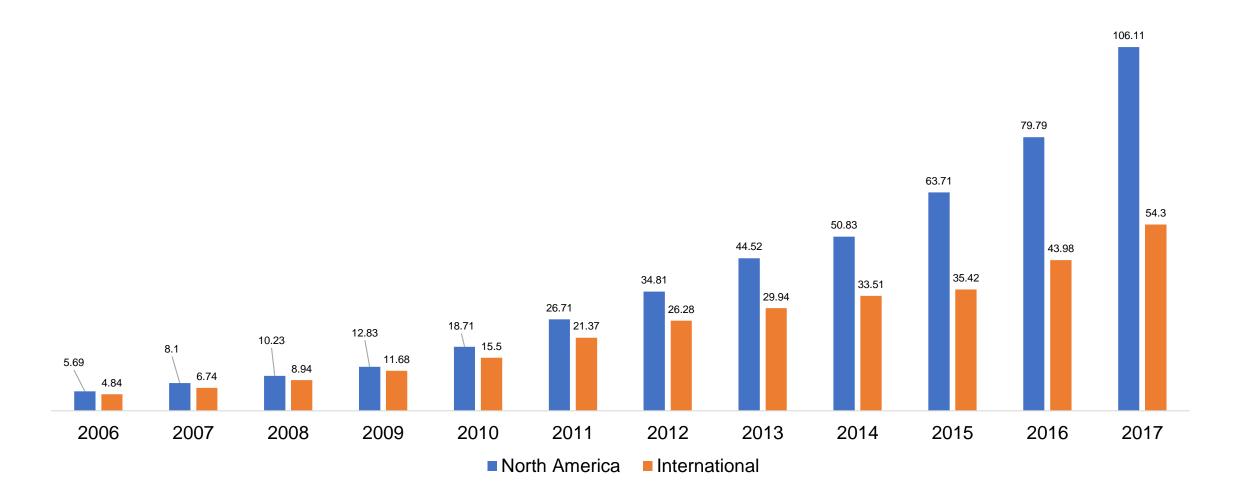**RETAILER CHOICE: LAST CROSS-BORDER ONLINE PURCHASE**
Cross-border ecommerce shopper survey, 2017

- Other
- Amazon
- Alibaba/Aliexpress
- eBay
- Wish
- Zalando
- ASOS
- Apple

2.00% 1% 1%
8.00%
8.00%
31%
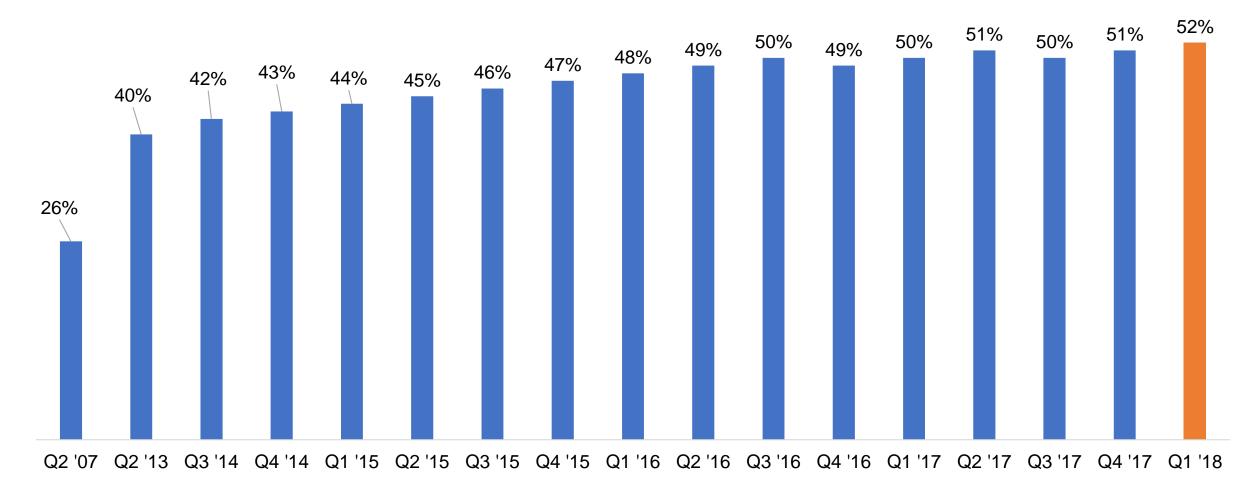14.00%
25.00%

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www.ecommerce-europe.eu

Amazon to represent ½ the US ecommerce market by 2020

Annual Net Revenue of Amazon, by region, billions U.S. dollars 2006-2017. Source: Statista, 2018; Amazon, 2018; Ecommerce Foundation, 2018.

Chart data (North America | International):
- 2006: 5.69 | 4.84
- 2007: 8.1 | 6.74
- 2008: 10.23 | 8.94
- 2009: 12.83 | 11.68
- 2010: 18.71 | 15.5
- 2011: 26.71 | 21.37
- 2012: 34.81 | 26.28
- 2013: 44.52 | 29.94
- 2014: 50.83 | 33.51
- 2015: 63.71 | 35.42
- 2016: 79.79 | 43.98
- 2017: 106.11 | 54.3
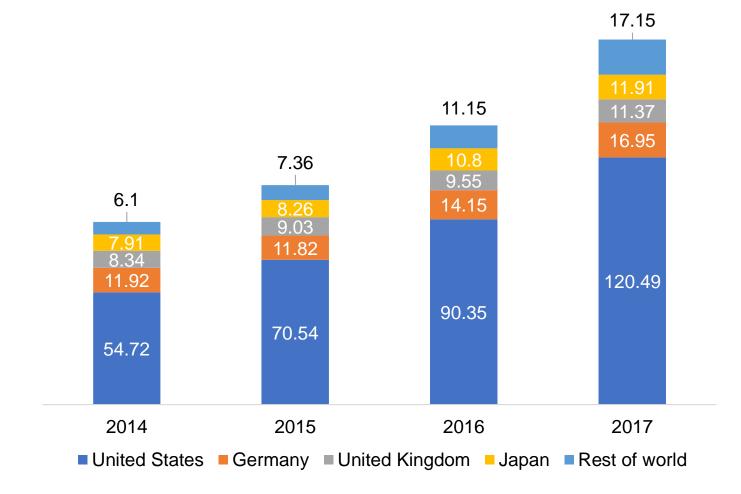
■ North America   ■ International

More than 50% of all items are sold by Amazon sellers

Percentage of Paid Units Sold by Third-party Sellers on Amazon Platform, Q2 2007 - Q1 2018. Source: Statista, 2018; Amazon, 2018.

Quarter	Percentage
Q2 '07	26%
Q2 '13	40%
Q3 '14	42%
Q4 '14	43%
Q1 '15	44%
Q2 '15	45%
Q3 '15	46%
Q4 '15	47%
Q1 '16	48%
Q2 '16	49%
Q3 '16	50%
Q4 '16	49%
Q1 '17	50%
Q2 '17	51%
Q3 '17	50%
Q4 '17	51%
Q1 '18	52%

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Nearly 50% of Amazon's sales is from outside the USA

Stacked bar chart — Annual Net Sales of Amazon (billions U.S. dollars), selected leading markets, 2014-2017

Year	United States	Germany	United Kingdom	Japan	Rest of world	Total
2014	54.72	11.92	8.34	7.91	6.1	
2015	70.54	11.82	9.03	8.26	7.36	
2016	90.35	14.15	9.55	10.8	11.15	
2017	120.49	16.95	11.37	11.91	17.15	

Legend: ■ United States ■ Germany ■ United Kingdom ■ Japan ■ Rest of world

Amazon accounted for 33.5% of all UK online spend in 2017 and that's up from 29.6% of UK online spend in 2016.

Amazon sold $11.37 in the UK in 2017.

Amazon sold $16.95 in Germany in 2017

Annual Net Sales of Amazon, billions U.S. dollars, selected leading markets, 2014-2017. Source: Statista, 2018, Amazon, 2018

Marketplaces on the rise: different strategies, same goal

3 Trends Alibaba and Amazon are Banking On

Digitization and on-the-go global finance

Increases in global growth

Continuing increase in internet penetration

amazon

Strategy #1: Acquisition

Amazon has chosen to take advantage of global trends by buying up more companies over recent years, doing so with much more frequency than Alibaba (five times more in fact).

Globalisation of its branded marketplace is the name of the game.

Alibaba Group

Strategy #2: Investment

Alibaba on the other hand has been busy investing in companies across the world, taking a minority stake in twice the number of companies Amazon has.

It aims include connecting the world's online markets through logistics and subsidiaries.

Source: CB Insights, 2018

Amazon has a strong presence in Europe

Amazon has operation in 5 European countries, selling across the entire region

amazon

United Kingdom	Germany	France	Spain	Netherlands
Since Oct 1998	Since October 1998	Since Aug 2000	Since Nov 2011	Since Nov 2014

Growth through investment and partnerships

In order to strengthen its presence in the region, in 2011 it acquired a minority stake in CicekSepeti (Turkey) and investments in two parcel companies (UK and France) in 2014.

This was followed by partnerships with DHL (2017) and Goodman (2016) to enhance logistical infrastructure.

Source: CB Insights, 2018

ECOMMERCE EUROPE

**Silvio von Krüchten
Co-Founder & CEO
i-ways sales solutions GmbH**

.shop

Silvio von Krüchten leads the company in its mission to provide consulting, technology, & marketing to brands, retailers & publishers aspring for digital leadership in their industries. He and his team open & expand opportunities for their clients in relevant digital markets across North America, Europe and Asia and provide unmatched local market insights and perfectly fitting building blocks for digital success. Before founding i-ways, Silvio held several positions at eBay in Europe. He holds a Diploma in Economics from the Beuth University of Applied Sciences.

What are some of the main internal stumbling blocks when becoming an omnichannel organization (money, knowledge, legacy systems, lack of vision from management, etc.)?

From my experience, a successful transformational journey in every company starts at the top. Top management executives need to understand that becoming a successful omnichannel organization requires fundamental changes, and in order to achieve that vision strategies touching almost all aspects of the company need to be applied.

Companies need to accept that they need to completely rebuild their organizations and processes to have the customer always at the center of attention – they need to shift towards more real-time, more flexible, more data driven daily routines of all involved departments and employees. In a nutshell: Digital transformation starts with the people - it is crucial that organizations manage to explain the goals and strategy of the transformation in an easy-to-understand way in order to get the buy-in of the retail shop personnel and all other involved employees.

Otherwise, the lack of understanding for the intention or typical behavior of today's cross-channel savvy customers can't be compensated and the crucial process know-how of providing a smooth cross channel experience can't be established and renewed regularly. Retail chains need to understand the challenges and opportunities of decentral commerce, for example click & collect as well as ship from nearest retail location with same day delivery (if possible) in order to maximize the monetization of their existing assets and to create competitive advantage against online pure-players. Last but not least the lack of ability to collect and analyze customer data across all channels in combination with the limited ability to identify customers at all touch points to generate personalized offers and experiences is a major obstacle on the way towards true omnichannel.

What are some of the biggest mistakes you see when SMEs move to a foreign online market?

I observed a widely spread set of problems, starting from the product offering not being adapted to local consumer needs and their expectations sufficiently. Also, an insufficient knowledge of local legislation and regulations are quite common. Practical aspects like payment methods and shipping options happen to be common mistakes. An insufficient knowledge of local expertise, e.g. regarding USPs, pricing, language, timing of promotions, marketing campaigns, the usability of an online shop and trust in a domain name happen.

In addition, customers expect local support dealing with these issues and inquiries to increase customer satisfaction as well as easy and cheap (therefore probably local) return options. When an SME wants to enter a foreign online market, it could be wise to enter it through a "standardized" gate like online marketplaces in order to learn about local specialties without sacrificing too much in marketing dollars. Remember, results need time, especially if you try something new, so patience is an essential. Also, a thorough analysis of results to improve over time is recommended.

**Silvio von Krüchten
Co-Founder & CEO
i-ways sales solutions GmbH**

.shop

Silvio von Krüchten leads the company in its mission to provide consulting, technology, & marketing to brands, retailers & publishers aspring for digital leadership in their industries. He and his team open & expand opportunities for their clients in relevant digital markets across North America, Europe and Asia and provide unmatched local market insights and perfectly fitting building blocks for digital success. Before founding i-ways, Silvio held several positions at eBay in Europe. He holds a Diploma in Economics from the Beuth University of Applied Sciences.

How do you see the relationship between physical and online retail?

From a customer perspective retail experience and digital touchpoints need to be connected. If a consumer buys a product online he expects to be able to pick it up and return at a physical retail location. An expected service would include if a retail clerk is able to offer a special promotion that customers can then redeem online since they expect a seamless omnichannel experience and do not understand "gaps". If those gaps happen, like price discrepancies in different channels, they are a huge reason for disappointment and churn.

Brands and retailers also need to think forward into distributed commerce experiences, where the POS is the customer regardless where she or he is: online on social media, on online marketplaces, on a publisher website, offline at a bus stop, the doctor's office or somewhere else.

What innovative customer experience do you believe will push forward the customer experience most online?

Personally I think one of the biggest game changers in 2018 will be Distributed Commerce in all aspects of the web-shopping on blogs, online forums, display ads, picture galleries and many further formats will become more and more natural.

Of course only, if the already high standards of online retail are met: smooth shopping experience on website, quick & reliable fulfilment combined with a memorable, easy name of the website like .shop. In order to differentiate, it will become essential to provide outstanding marketing combined with exceptional after-sales service to create trustworthy "no-brainer" shopping experiences.

What are your top 3 tips for localizing to a new market most efficiently?

I would vote for a carefully prepared market entry, to get familiar with legislation, regulations and preferred payment and shipping methods. This might be best achieved with local support from experienced partners like marketplace operators, influencers or cooperation partner.

Also, I would recommend adopting existing content to local needs and habits. While this sounds pretty natural, some retailers forget about small details like providing a free support number, a declaration of VAT or shipping methods and times. Local habits they should take into account include usability, design and tonality.

My third recommendation is about "KISS" – keep it simple and stupid. In our digitized world, simple yet clear messages are understood best and remembered: What do you offer, why should customers buy in your shop and what are your terms and conditions? Using a great domain name like www.beauty.shop will help to communicate your message quickly. If you add an outstanding and self explanatory logo and claim, a clear call to action, transparent pricing and payment you are on the road to success.

Which demographic is growing fastest in the ecommerce market in Europe?

We would vote "Millennials" and especially the value-seekers as a fundamental growth driver in major European markets such as UK and Germany. We already see them as the most important "new buyer" segment as they are primarily mobile users, heavily selective, have seen a lot of shopping experiences and are therefore easily leaving a website or shop if it does not keep up with their expectations.
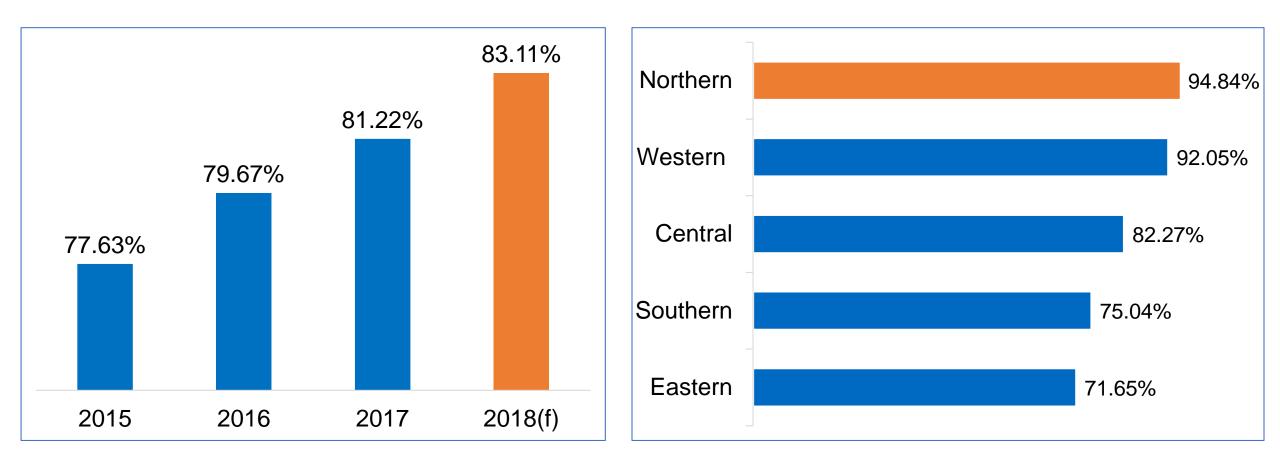
European Ecommerce Facts & Figures

Internet penetration in Europe is steadily increasing

77.63% — 2015
79.67% — 2016
81.22% — 2017
83.11% — 2018(f)

Northern — 94.84%
Western — 92.05%
Central — 82.27%
Southern — 75.04%
Eastern — 71.65%

Internet Penetration in Europe, 2015-2018(f). Internet penetration, per region 2018(f); Source: Ecommerce Foundation, 2018.

Sweden has the highest penetration, Ukraine the lowest

TOP 10 COUNTRIES

Countries	Internet access*	Online population
Europe	*83.11%*	*631.3mn*
Top 10	*96.72%*	*123.89mn*
Sweden	99.7%	9.95mn
Switzerland	98.3%	8.40mn
Iceland	98.0%	0.33mn
Denmark	97.0%	5.58mn
Netherlands	97.0%	16.57mn
Luxembourg	97.0%	0.57mn
United Kingdom	96.0%	63.91mn
Norway	96.0%	5.14mn
Finland	94.7%	5.25mn
Austria	93.6%	8.19mn

BOTTOM 5 INTERNET ACCESS

Countries	Internet access*	Online population
Bottom 5	*68.42%*	*41.28mn*
Bulgaria	70.4%	4.95mn
Bosnia Herzegovina	69.6%	2.44mn
Croatia	69.3%	2.89mn
Albania	66.8%	1.96mn
Ukraine	66.0%	29.04mn

Internet Penetration throughout Europe is increasing rapidly

Internet penetration as share of total population, 2018(f). Source: ITU, 2018; Eurostat, 2018, Ecommerce Foundation 2018.

Internet use & online shopping differs strongly across the EU
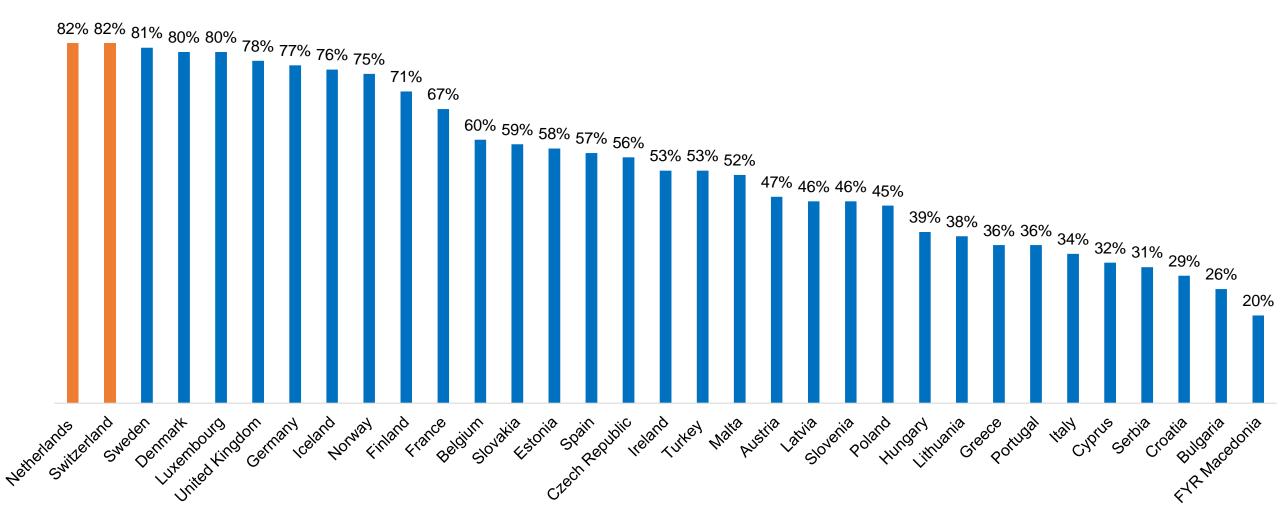

■ Percentage of individuals who used internet in the last 12 months   ■ Percentage of Individuals who purchased online in the last 12 months

Internet Use and Online Shoppers, 2017. Source: Eurostat, 2018.

Online shopping ranges from 82% to 20%

Share of online shoppers in the previous 12 months, 2017. Source: Eurostat, 2018.

Netherlands 82% — Switzerland 82% — Sweden 81% — Denmark 80% — Luxembourg 80% — United Kingdom 78% — Germany 77% — Iceland 76% — Norway 75% — Finland 71% — France 67% — Belgium 60% — Slovakia 59% — Estonia 58% — Spain 57% — Czech Republic 56% — Ireland 53% — Turkey 53% — Malta 52% — Austria 47% — Latvia 46% — Slovenia 46% — Poland 45% — Hungary 39% — Lithuania 38% — Greece 36% — Portugal 36% — Italy 34% — Cyprus 32% — Serbia 31% — Croatia 29% — Bulgaria 26% — FYR Macedonia 20%

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Schwarz has the highest European turnover

Full version available at
www.ecommercefoundation.org/reports

Internet Retailer Ranking for Europe, 2017. Source: Veraart Research Group, 2018.

Leading online European retailers in 2017

Leading Online Retailers* :
Europe
Amazon
Argos
Bonprix
Currys
Debenhams
Decathlon
Deichmann
Halfords
Homebase
House of Fraser
Marks & Spencer
New Look
Next
PC World
Sainsbury's
Screwfix
SportsDirect.com
Superdrug
Tesco

Elite retailers :
Europe
Apple
Boots
H&M
IKEA
Nike
Zara
Tesco

Elite retailers are those who have a hyper sophisticated distribution channel all across Europe.

Leading retailers. Source: Internet Retailing/IREU, 2017.

*You can find the newest full report, released in July 2018, here.

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Mark de Bruijn
VP, Head of EMEA & MEE Marketing, SAP Hybris

Mark is a modern, data-driven marketer with a passion for digital, innovation and everything related to customer experience. For the past 8 years, Mark has taken on various roles in marketing, business intelligence and predictive analytics. In addition, he was affiliated with Avans University as a lecturer. Mark's greatest pleasure is sharing his vision and knowledge with others, as he is a regular speaker at events across the world.

www.hybris.com

How would you say customer engagement is changing in the European e-commerce space? Both the needs of consumers, as well as retailer techniques to adapt and meet those needs.

The customer journey is more complex than ever. Quite simply, it is no longer possible to refer to a single customer journey. Consumers dash all over the place, online and offline, and expect a personalized approach from brands across the entire omnichannel journey.

The connected customer of today uses multiple channels, and makes their own decisions as to when and how they contact a brand to purchase their goods or services. The days of generalized customer profiles are numbered. As customers speak up, marketers increasingly gain more insight into customer preferences. Customers expect a personalized customer journey, in which they have control over when and how interaction takes place.

To provide exceptional customer service and individualized customer journeys, brands need to make effective use of data and intelligence. The plethora of information gathered from various tools needs to be converted from data into actions, in which brands deliver marketing in the moment to each individual.

How do you avoid getting entangled in a web of marketing tools?

Marketers have a whole range of tools to provide optimum service to customers. Ironically, however, those solutions can also lead to new problems, such as data silos and an inconsistent customer experience. The success of data-driven marketing stands or falls with a clearly structured data landscape. Organizations often have vast amounts of data at their disposal, but have yet to extract any useful insights from all that data.

"The success of data-driven marketing stands or falls with a clearly structured data landscape."

New technology gives marketers more options than ever to retain customers. More isn't always better, though – especially when it comes to tools.

Brands must acknowledge that the right technology is not only instrumental but strategic in engaging their customers. The trend is about moving away from disconnected, legacy solutions toward building a true partnership with a vendor that is able to manage the whole of the processes related to the customer journey, from marketing, to CRM, to e-commerce, down to customer service. This integrated approach becomes even more critical with regards to the data protection regulation and the ability to have one single view of the customer across every touchpoint.

For foreign retailers wanting to expand to Europe, what are the main barriers? How do you combat these, and what are your top 3 tips for success?

One of the most harshly fought battlegrounds is that of providing a seamless omnichannel experience to avoid losing customers to competitors who offer a better customer experience. In the digital age, consumers expect top-notch customer service, and the ability to buy what they want, anywhere, and anytime, through various channels, offline and online.

"A seamless omnichannel experience is essential."

Mark de Bruijn
VP, Head of EMEA & MEE
Marketing, SAP Hybris

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The majority of online research today occurs on mobile, and on mobile, consumers are often more task-loyal than brand-loyal – they want to solve their need quickly. With brick-and-mortar stores seeing fewer and fewer purchases while online sales continue to enjoy meteoric rises, retailers must face the music, and it's a whole new dance card. A seamless omnichannel experience is essential as today's demanding customers expect a personalized customer journey, regardless of where they interact with the brand. Retailers can only meet those expectations by integrating all channels.

Social media is increasingly acknowledged as a review platform. Over 50 percent of consumers use social media to submit complaints to companies, or post reviews and responses. Social media is a quick and easy way to announce customer dissatisfaction to the rest of the world. Due to the increased use of social media, the time-honored principle of word-of-mouth advertising has grown into an enormously influential factor in the world of retail. For retailers, it is important to find out what customers are sharing on social media about their brand, and to try and have a positive influence on it.

Only a handful have an effective road map in place for the digital age. These next twelve months, organizations will focus on increasing profits, building customer trust, and providing excellent customer experiences. However, they usually lack an effective road map to achieve these objectives. In order to retain and improve customer loyalty, it is essential that these objectives remain top priority. A plan for making that happen is the basis for effective action. Technology offers a supporting tool to execute this plan.

Regarding machine learning – How can investing in and utilizing machine learning positively impact foreign retailers expanding to Europe?

In the past, Customer Relationship Management (CRM) heavily relied on people to collect and analyze data. Today, we are seeing a paradigm shift in sales from being reactive to proactive, and from instinct-driven to data-driven.

AI can quickly analyze and accurately predict which customers are more likely to make a purchase, and how you can best engage with them.

With machine learning, your advanced cloud CRM solution can learn over time to forecast and score deals with greater accuracy, making it easier for sales teams to reach their numbers and help the company increase revenue goals. Ultimately, AI can assist with the entire customer journey, from prospecting to a sale, to service after the sale.

How do you see marketing shift from macro to a micro viewpoint in Europe? Have European retailers done enough in this regard, and what strategies do you see being implemented to achieve this in the near to medium future?

Customer Experience is the new battleground for competition. This is where a brand can really make a difference. However, many companies still operate within the traditional organizational structure of the business, where each department looks at the singular experience they deliver using their own resources. As a first step to deliver 'micro'-personalized experience though, companies must break the data silos caused by disconnected systems and create a unified customer profile across the organization. To make the best use of this customer information, machine learning algorithms can help marketers surface hidden purchasing intents and identify patterns in each customer's journey to deliver targeted, consistent and relevant experiences at every touchpoint.

B2C Ecommerce expected to rise

Full version available at
www.ecommercefoundation.org/reports

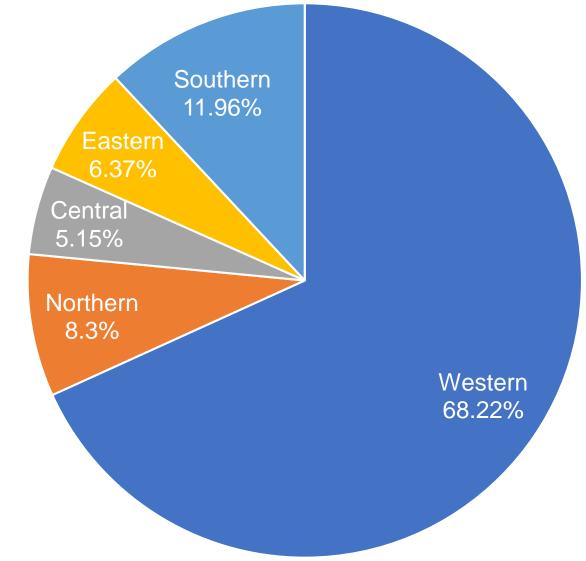Ecommerce Sales, Europe 2013-2018(f). Source: Ecommerce Foundation, 2018.

Ecommerce growth predicted to charge ahead in 2018

Full version available at
www.ecommercefoundation.org/reports

| 2014 | 2015 | 2016 | 2017 | 2018(f) |

Growth of ecommerce Sales 2014-2018(f), Europe. Source: Ecommerce Foundation, 2018.

Western Europe is the largest market for ecommerce

Western Europe continues to dominate the market, with big hitters including the United Kingdom, Germany, France, Italy and Spain. The advanced infrastructure, as well as high internet use and consumer comfort with ordering online make for healthy e-commerce markets that continue to grow and flourish.

Southern 11.96%
Eastern 6.37%
Central 5.15%
Northern 8.3%
Western 68.22%

Percentage of European B2C turnover, per region, Europe, 2017. Source: Ecommerce Foundation, 2018.

U.K. still forecasted to have the largest ecommerce market

Full version available at
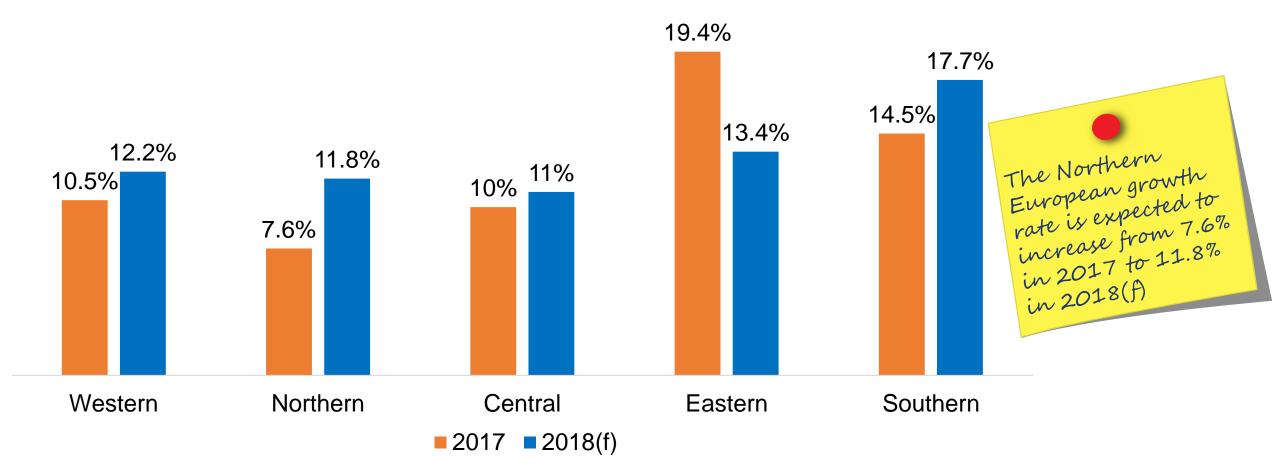www.ecommercefoundation.org/reports

ECOMMERCE
EUROPE

The U.K. has the highest E-GDP

Full version available at
www.ecommercefoundation.org/reports

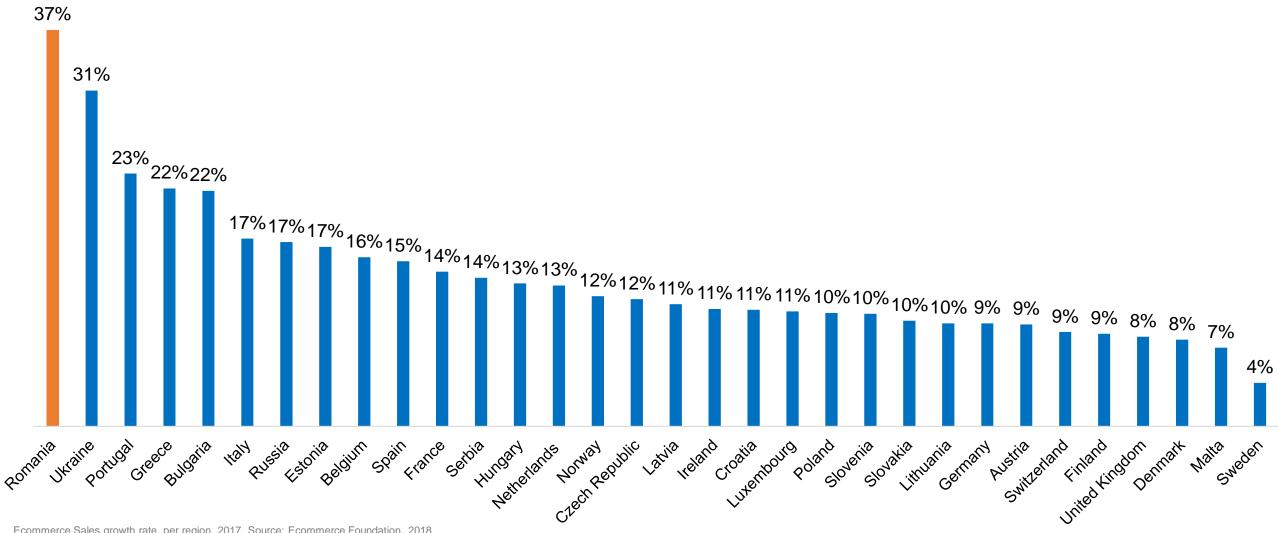Ecommerce Sales as percentage of GDP, top 10 countries, 2017-2018(f). Source: Ecommerce Foundation, 2018.

Southern European ecommerce is on the rise

Western — 10.5% (2017), 12.2% (2018(f))
Northern — 7.6% (2017), 11.8% (2018(f))
Central — 10% (2017), 11% (2018(f))
Eastern — 19.4% (2017), 13.4% (2018(f))
Southern — 14.5% (2017), 17.7% (2018(f))

■ 2017 ■ 2018(f)

The Northern European growth rate is expected to increase from 7.6% in 2017 to 11.8% in 2018(f)

Ecommerce Sales growth, per region, 2017-2018(f). Source: Ecommerce Foundation, 2018.

Romania experienced highest ecommerce growth rate (2017)

Bar chart showing ecommerce sales growth rate per country:
- Romania: 37%
- Ukraine: 31%
- Portugal: 23%
- Greece: 22%
- Bulgaria: 22%
- Italy: 17%
- Russia: 17%
- Estonia: 17%
- Belgium: 16%
- Spain: 15%
- France: 14%
- Serbia: 14%
- Hungary: 13%
- Netherlands: 13%
- Norway: 12%
- Czech Republic: 12%
- Latvia: 11%
- Ireland: 11%
- Croatia: 11%
- Luxembourg: 11%
- Poland: 10%
- Slovenia: 10%
- Slovakia: 10%
- Lithuania: 10%
- Germany: 9%
- Austria: 9%
- Switzerland: 9%
- Finland: 9%
- United Kingdom: 8%
- Denmark: 8%
- Malta: 7%
- Sweden: 4%

Ecommerce Sales growth rate, per region, 2017. Source: Ecommerce Foundation, 2018.

www.ecommerce-europe.eu

Renaud Marlière
Chief Marketing & Sales Officer

Renaud Marlière started his career in 1994 as account manager for a French fulfillment company. This first experience was the starting point of his career in the direct mail and small parcel business in leading global logistics and postal companies.

In 2003, he joined Group La Poste and took on new responsibilities as Head of Sales and Distribution for La Poste Global Mail. Since the foundation of Asendia in 2012, he is the Chief Marketing and Sales Officer of the Group.

www.asendia.com

What are the main challenges for cross-border ecommerce at the moment?

Consumer habits and identity represent a major challenge for cross-border ecommerce. These vary from country to country and it's crucial for retailers to remember that a little local knowledge goes a long way and can help to create competitive advantage. Security and fraud risks also vary depending on where you are in the world and cyber criminals are quick to take advantage where the requisite local knowledge and understanding is not there. Regulation is also a challenge, particularly with uncertainty over Brexit and the changes being introduced to the way customer data is handled by the GDPR. Finally, logistics remains the key challenge for cross-border ecommerce.

There are big differences in local logistics infrastructure, delivery choices and methods, as well as warehousing, and these differences can be problematic for businesses keen to expand across borders without the right knowledge and support in place to ensure that customer experience of a brand isn't affected.

Which are the success factors for retailers when delivering internationally?

Repeated consumer studies have revealed how important it is to customers to be able to track and trace their deliveries. This becomes especially crucial where goods are crossing borders to travel internationally. According to Ofcom's Communication Market Report, a majority of shoppers prefer to have notifications and/or tracking in place for ecommerce deliveries. 63% expect to have email confirmation at each stage of delivery. This gives track and trace for international deliveries particular importance and makes it crucial to find a provider with email notifications and full tracking built in for every order.

For many e-retailers, returns are an afterthought and others hope that they simply won't have to deal with them. However, around 30% of goods are returned online and this can create real customer service issues if the process is too long or there are problems with receipt of returned items.

Working with an international delivery provider with an efficient international returns process is essential because 92% of consumers will buy something again if returns are easy.

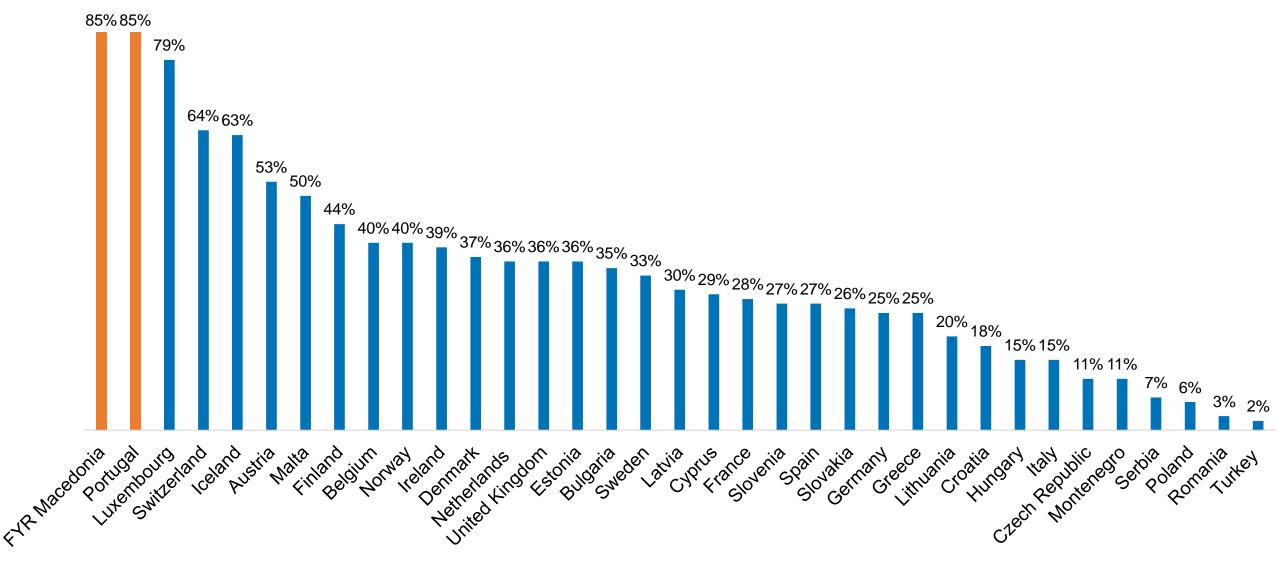So, when it comes to returns, the right provider could be crucial to building your global consumer base.

Which are the success factors for retailers when delivering internationally?

Probably the most obvious and often-repeated mistake is expansion that is too fast. SMEs see an opportunity and want to act quickly – while this speed is often important, moving unprepared into a foreign market can affect key areas of trust with consumers, from product quality to delivery times. It's important for SMEs to be aware of the challenges of scalability, from expanding technology networks to coping with more complex logistics and customer service. Research into the local market will also be essential, particularly when it comes to "details" such as delivery choices and payment preferences – for example, the preferred payment method of online shoppers in Germany and Switzerland is invoice. This kind of local knowledge could be crucial to getting expansion into the market right.
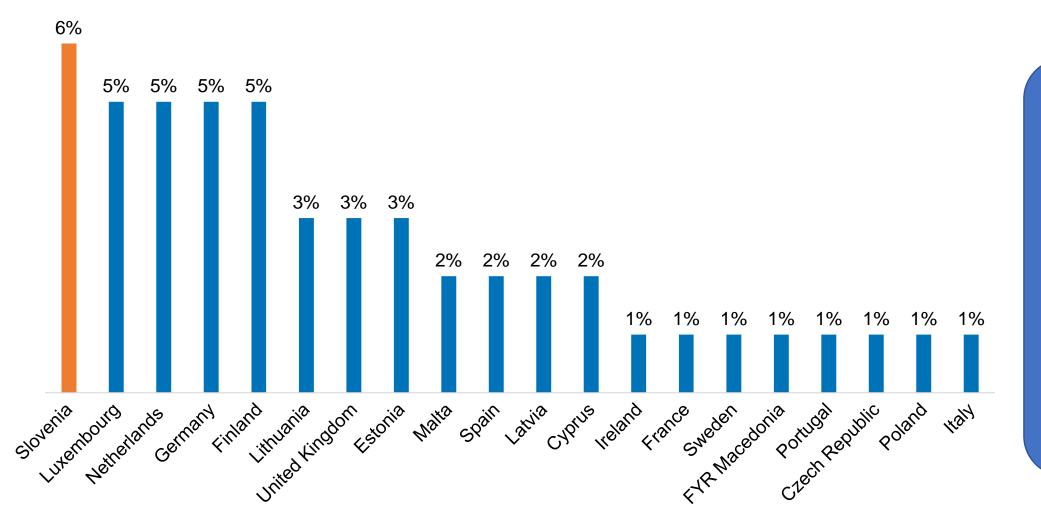
Macedonia & Portugal have most cross-border e-purchases

Percentage of cross-border purchases, Europe, 2017. Source: Eurostat, 2018.

www.ecommerce-europe.eu

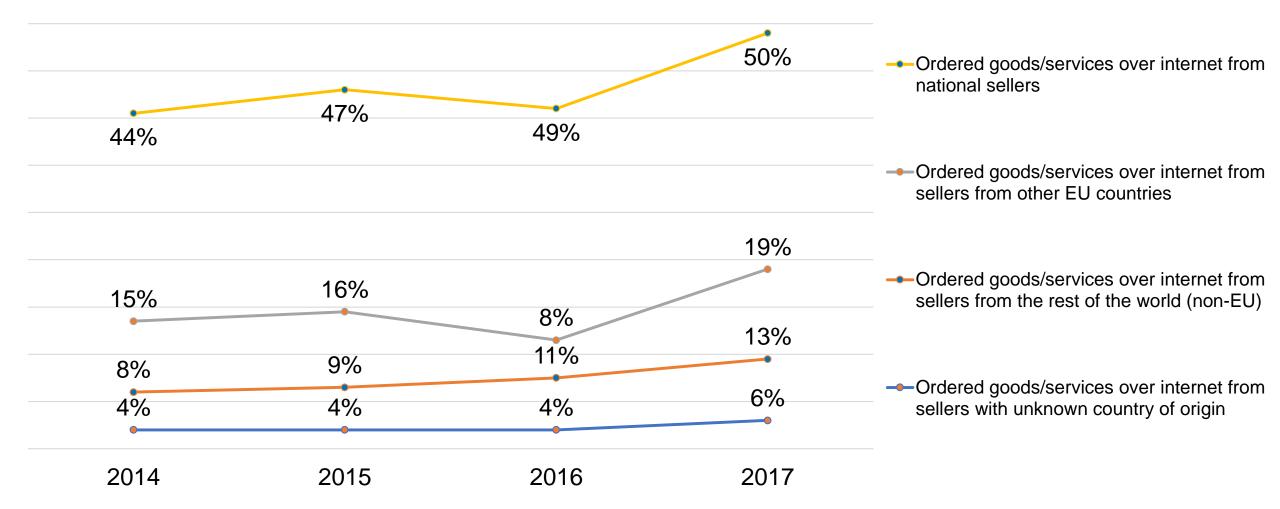# Slovenia has highest cross-border e-purchase growth rate

Some countries experienced no growth or decreased growth rates in cross-border purchasing. For example, Greece, Austria, Belgium, Hungary, Romania and Turkey showed no growth. Bulgaria, Slovakia, Norway and Denmark showed a decreased growth rate.

Cross-border online purchase growth in the previous 12 month, Europe, 2016-2017. Source: Eurostat, 2018.
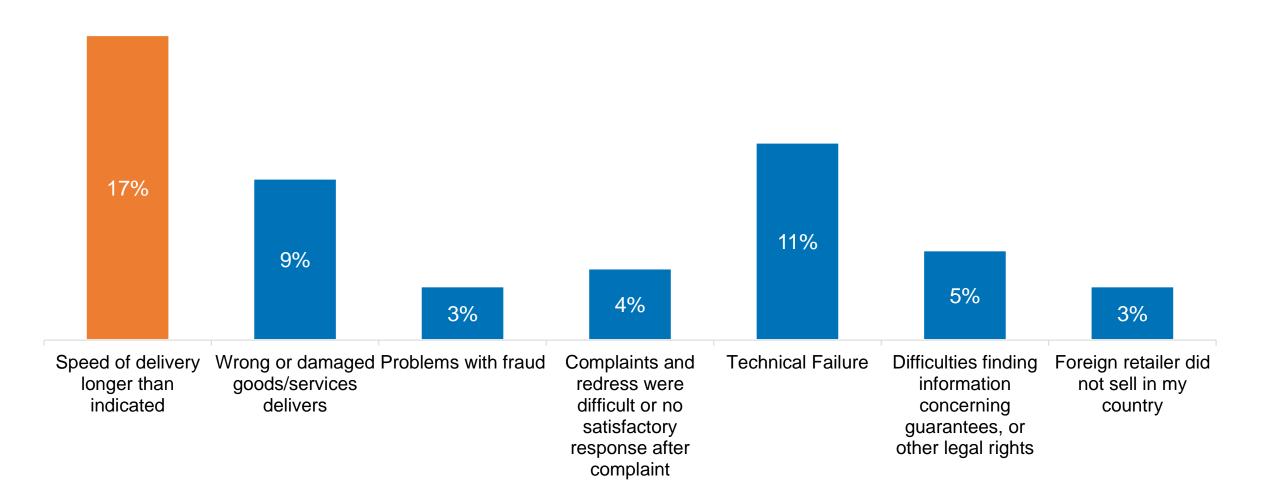
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38% of all online shoppers ordered abroad in 2017

50%

47%

44%

49%

19%

16%

15%

8%

13%

8%

9%

11%

6%

4%

4%

4%

2014   2015   2016   2017

Ordered goods/services over internet from national sellers

Ordered goods/services over internet from sellers from other EU countries

Ordered goods/services over internet from sellers from the rest of the world (non-EU)

Ordered goods/services over internet from sellers with unknown country of origin

Online shoppers buying cross-border in the previous 12 months, Europe, 2014-2017. Source: Eurostat, 2018.

Cross-border online shopping still has its challenges

17% Speed of delivery longer than indicated

9% Wrong or damaged goods/services delivers

3% Problems with fraud

4% Complaints and redress were difficult or no satisfactory response after complaint

11% Technical Failure

5% Difficulties finding information concerning guarantees, or other legal rights

3% Foreign retailer did not sell in my country

Problems with cross-border shopping, Europe. Source: Eurostat, 2018.

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Expanding E-commerce Platforms across the Border

The new era of digital commerce raises important questions for global brands. Over the past decade, customers have become more knowledgeable and demanding. Customer journeys have become increasingly dynamic and varied. It's all about the experience, and this will only become more pronounced as we further move toward an integrated omnichannel future. To serve tomorrow's consumers, you will need to craft seamless, high-quality journeys. But doing so won't be easy. You will have to communicate consistently across all touch points and across all regions. How can you speak with a single, unified voice, while also tailoring your product or platform to meet each local market's preferences?

Three Key Challenges in Cross-border E-commerce Management

Even in today's always-online world, digital experiences are often fragmented. Many global players operate a tangled web of digital channels, using disconnected tools for specific brands or even specific countries. This makes it very difficult to roll out unified commerce experiences in the first place, much less manage them effectively.

Remember: one size rarely fits all; each company is different and requires a unique approach. However, if you aim to improve your global e-commerce delivery, the following three key topics should be your primary starting points.

1. Establish a Centrally-Managed Global E-commerce Delivery Platform

Do you know how much your company spends on its online environments, platforms and activities each year? Fragmented e-commerce management solutions often lead to hidden costs.

Managing your commerce delivery with a single, global platform will make it far easier to keep track of licensing fees, development costs and agency expenditures, both on the international and the local level.

Still, improved cost management is a secondary benefit – one of many such benefits that a centrally-managed e-commerce platform provides. First and foremost, a global platform will allow you to establish a single view of your customers and engage them with unified, personalized content. Such a system allows for shared content strategies, focused investments in security and performance, and the ability to roll out vital information quickly and consistently across all touch points and locations.

Client Case: Overhauling an Electronics Web Shop

A global electronics and high-tech components manufacturer wanted to increase its business value by improving its digital sales and online customer experience with a new global e-commerce platform. The old system offered limited functionalities and alignment to the company's online

business needs. Not surprisingly, several subsidiaries started to build or acquire other tools that better catered to their local market needs, thereby bypassing global guidelines.

The electronics company was therefore in need of an adaptable e-commerce solution that would meet the demands of all subsidiaries for superior customer experience at a local level, enabling an increase in online sales, while standardizing to a common core architecture. Moreover, the to-be-chosen solution had to be integrated within the existing ERP and backend systems.

In this specific case, the consulting team chose for an SAP Hybris 6.0 solution. The objective of the new platform was to replace the existing Hybris solution and enable subsidiaries to receive a full-featured online shop capable of supporting e-commerce in any country, catering to local preferences.

Accenture Interactive

2. White-Label Your User Experience Design for Universal Benefit

In order to project a strong global brand image, your company will need to maintain its presence in many countries. But while each locale must abide by its own budget, it is vital to your organization to ensure consistency in quality and how consumers perceive your brand.

Without a centrally-managed e-commerce system, these objectives will frequently be at odds with one another. Limited local budgets mean less opportunities to meet quality standards, which puts more pressure on brand perception. At the same time, each country is essentially forced to invest separately in comparable technologies and features. This means less mature brands and operating units will be unable to benefit from investments made elsewhere.

A global digital e-commerce platform will allow you to white-label customer experiences, making it possible to share and reuse resources, components and templates across multiple countries and (sub-)brands. You'll be able to roll out new campaigns, products and digital experiences far faster than ever before.

Since you already have access to a library of generic features, deployment speed is limited to the time it takes to style each campaign.

Client Case: Starting Locally, Expanding Globally

Remember, the electronics company referred to wanted to enable subsidiaries to receive a full-featured online shop capable of supporting e-commerce in any country. By starting a pilot with its Australian subsidiary, closely followed by the German and French offices, the company could try out the new architecture without harming the existing operations of the entire organization as well as those of its subsidiaries. What were the decisive elements that made a success of this approach?

Having at least one employee per subsidiary involved in the development of the new e-commerce platform ensured that the subsidiaries would not slack, as these project managers installed commitment and knowledge on the spot.

By providing training to local project managers and operations teams, the subsidiaries were properly educated and informed.

Moreover, even though they had to give up some of their independence, the local offices could cater the solution to their local needs. The result was that fears of too strict control from HQ were taken away and local creativity still found a way to commit to local consumer preferences.

Due to the success of the newly developed web shop, the project has been rolled out, one by one, to an additional 10 markets across APAC, Europe and North America. The company receives support from three Accenture delivery hubs in those regions. Deployment is also underway in other subsidiaries across the Middle East, Asia and Europe.

3. Balance Local Ownership with Strong Global Governance

In a multinational organization with a wealth of brands and touch points, it goes without saying that each country's branch should be able to react to opportunities in the local market. At the same time, risks to the overall brand image must be minimized wherever possible.

Disconnected solutions give each country a large degree of independence and latitude, because they get to decide what happens on 'their' platform. While this is often a source of pride at the local level, this fundamentally siloed approach invariably increases your exposure to security vulnerabilities and performance issues. These, in turn, increase the risk of damage to your brand.

Establishing an appropriate degree of control at the global level while acknowledging the need for flexibility and ownership at the local level requires well-designed governance processes. This can only go smoothly if clear agreements are made regarding what local branches can do. Also, you must appoint a platform owner at the global level who can balance local needs with global goals and judge these considerations fairly and effectively.

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Client Case: Balancing between Flexibility and Governance

Setting up a new architecture requires more than just pressing the button. How can you maintain the velocity of the delivery and ensure high-quality implementation, while over 200 people are working on the same project- with all teams work on one code and five or six subsidiaries are working towards their roll-out?

Overall, the delivery of the e-commerce solution into the target markets involved both technical and organizational aspects. The technical delivery support included UI/UX design for the e-commerce shop journeys, systems development and integration, technical architecture, application maintenance and support.

From an organizational point of view, the electronics company was reinforced with PMO, change management, organization design, and data analytics, while DevOps tooling has been used for country integration.

New organizational frameworks and assessment tools have been developed to support the company better understand how to operate their e-commerce through continuous improvements with the aid of clearly defined KPI. The manufacturer did not only build a new web shop, it also learned about setting up and monitoring e-commerce delivery, dependencies, governance structures and processes governance.

What's more, the company has increased its maturity level against industry benchmarks. In a couple of years, when the project is finalized, this cross-border e-commerce platform will be implemented in about 130 countries across the globe.

Experiment, Evaluate and Expand

Global e-commerce platform management requires a carefully considered, unified approach. Existing systems will need to be redesigned or replaced in such a way as to create a future-proof e-commerce platform. But that doesn't mean you'll be stuck with massive costs or high risks. After all, you don't have to force these changes everywhere all at once.

Instead, concentrate on a single brand or territory. Start by drafting a sensible, scalable design for your e-commerce platform, then test it in a limited capacity.

By monitoring the results and tweaking your platform accordingly, you'll be able to refine and optimize your approach. Once that's done, you'll be able to roll it out to new brands and new countries, eventually bringing your entire company into the fold.

The results for the global electronics company have been well-above expectations. Markets have been able to quickly launch new products and manage campaigns confidently. And with skyrocketing online sales and a new B2B revenue channel with a multi-store feature, where the company's corporate customers are offered employee purchase programs through the platform, the approach has proved to be a success.

Globally-managed, high-quality e-commerce delivery platforms will be your guides into the world of tomorrow. Transform your organization, govern globally and customize locally. Reduce costs, save time and leverage your resources. Advance your customer journey and boost your business value. Be prepared to deliver the e-commerce experience your consumers expect in today's disruptive world.

Interview

**Mehmet Olmez
Managing Director
Accenture Interactive**

Accenture Interactive

Mehmet Olmez is a Managing Director for Accenture Interactive, leading the Commerce, Content and Marketing platforms practices, including the Amsterdam-based Commerce Center for Europe specializing in leading e-commerce and experience management platforms.

With over 18 years of experience, his career includes end-to-end realization of digital transformations with specialization in Digital Commerce at global clients. He has deep interest in new trends impacting the CMO agenda and is an active blogger on these topics on Accenture Insights.

www.accentureinteractive.com

Blockchain has moved from a niche tech topic to a mainstream phenomenon in terms of publicity. When looking at its utilization with regards to provenance, how impactful will this be in the ecommerce space? Do you believe it can raise consumer trust, and therefore possibly increase cross-border trade?

The blockchain revolution is poised to disrupt e-commerce, decentralizing control and cutting out the middlemen. Fortunately, this sea change in e-commerce will also offer incredibly opportunities, making the exploration of blockchain technology both necessary and exciting. But it poses threats as well, especially to those companies that fail to add value for their customers. In a blockchain world, all companies that provide intermediary services will need to assess their level of added value to their customers' interactions. If you want to remain relevant for the consumers of the future, there's no better time to start exploring the possibilities of blockchain technology and e-commerce than the present. There are many use cases applicable for blockchain in the context of cross-border e-commerce. Building on the concepts of consumer trust and decentralization of power, the following can be relevant for cross-border trade:

◉ **Payments using crypto-currency:** Eliminating the need for banks for international transfers, and eliminating waiting times before the funds are transferred from the buyer to the merchant given the 24-hours always on nature of blockchain will increase cross-border trade when this becomes more common use.

◉ **Ensuring traceability of products and goods:** In combination with product warranties, traceability will help the consumer gain trust. Especially in the context of fraudulent or fake products, blockchain technologies can help warrant the authenticity of the products sold by showing full traceability from production till selling and shipping the products from the manufacturer.

◉ **Generating legitimate reviews of products or merchants**: The ability to generate legitimate reviews of products and services has a lot of potential. Nowadays, we can only assume that the reviews we find online are genuine. As positive reviews might just be generated by sellers looking to increase their turnover, while negative reviews could easily be written by competitors trying to thin out the playing field. Fortunately, blockchain technology can help to verify reviews. Blockchain solutions exist that compensate both review writers and moderators, incentivizing legitimacy and claiming a win-win situation for all parties involved.

What innovative uses of AI have you seen in ecommerce, and where do you see it being used in the future?

Accenture Interactive's Fjord identified seven trends that will impact your business this year. One of these trends are concerning that we are becoming Slaves to the algorithm, as in the new marketing environment, algorithms are taking on the role of gatekeeper between consumers and brands. Over the last few years, more and more consumer touchpoints have been created. Ranging from stores to websites and from chatbots to voice assistants, consumers use these (and many more!) contact points any time of day and at all possible locations. Moreover, they expect a consistent and personalized experience, and preferably one in which all information is updated instantly throughout all communication channels. Both the diversity of these touchpoints and the amount of data that is generated necessitate the use of artificial intelligence (AI).

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www.ecommerce-europe.eu

Mehmet Olmez
Managing Director
Accenture Interactive

Accenture Interactive

Mehmet Olmez is a Managing Director for Accenture Interactive, leading the Commerce, Content and Marketing platforms practices, including the Amsterdam-based Commerce Center for Europe specializing in leading e-commerce and experience management platforms.

With over 18 years of experience, his career includes end-to-end realization of digital transformations with specialization in Digital Commerce at global clients. He has deep interest in new trends impacting the CMO agenda and is an active blogger on these topics on Accenture Insights.

www.accentureinteractive.com

Manually, it will simply be impossible to keep up. First, machine learning, which is an important part of artificial intelligence, enables the analysis of large amounts of customer data. Instead of painstakingly working your way through massive data sets, CMOs can now establish patterns much more easily. Patterns that, more often than not, would have previously remained hidden. Netflix for example can predict what their viewers would like, before they know themselves, and provide very targeted and relevant recommendations.

Unsurprisingly, this leads to higher customer satisfaction and, consequently, more sales. Ebay's ShopBot, for example, offers curated deals, based on the information provided during GIF-enhanced quizzes.

Starbuck's chatbot, which can be found in the company's app, makes it easy to place an order, whether you prefer using voice commands or text messaging. The chatbot will tell you when your order will be ready and what the total costs are.

A similar service is offered by Pizza Hut, which has launched a Facebook Messenger and Twitter app taking user's orders and tracking delivery. Customers can also re-order their favorite pizzas, ask questions, and see current deals.

Another use-case is where artificial intelligence helps customers to guide to what they are looking for in a much more natural way. Go Find, for example, invites its users to take a picture, based on which it returns similar results, including price ranges and (online) stores. Amazon's Echo Look uses a camera, combined with artificial intelligence, to become your personal assistant that recommends which looks suit you best.

All these examples are centered around helping the customer in their journey with relevant services, solving their real issues using automated intelligence.

The rise of connected devices is ever-growing, even with the simplest device being online-enabled. Where do you see the internet of things (IoT) most impacting the customer experience when shopping/buying online?

With the ever-increasing number of connected devices that customers can own and interact with, the possibilities to shop digitally has also increased. It isn't just restricted to interactions with a graphical user interface on a laptop or mobile phone. Users can also buy online by talking to their voice-commanded assistant. Buying online can at some point even take place without any actual human interaction, where our connected coffee machine communicates the need for new espresso cups and places an order on your behalf, which is shipped by a drone in your garden. Or, going to an offline store while sitting on your couch is something we are going to experience very soon.
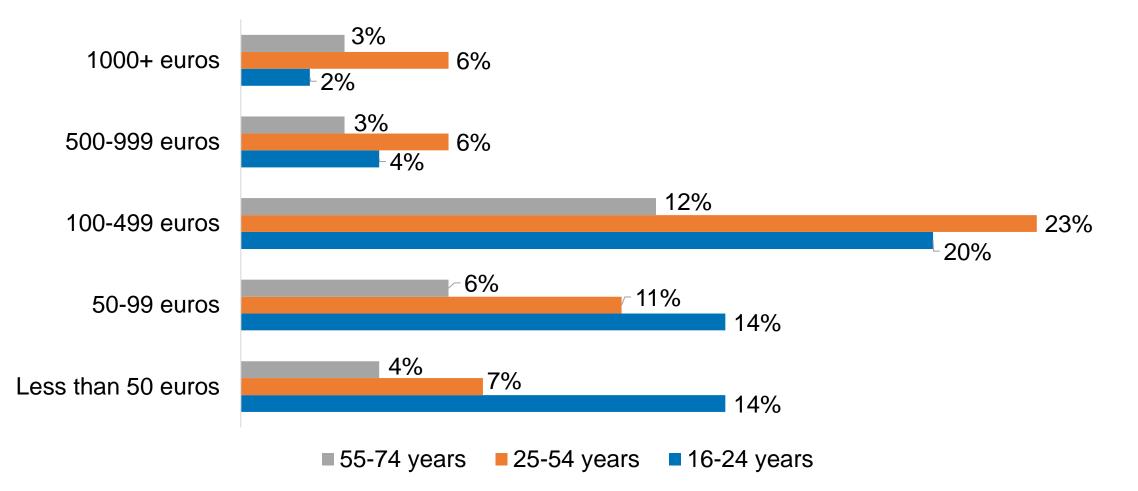
To serve tomorrow's customers, you must be customer-obsessed and make sure that all your touchpoints are connected, as all your customer's devices might be connected as well, resulting in an experience that is consistent in all those touchpoints.

What this means is that customers will buy in each of these so-called 'micro-moments', no matter where they are or what impulses they get. Interactions in these micro-moments give us many opportunities to engage with our customers. But the big challenge here is that every micro-moment needs to be relevant. While it gives you the opportunity to connect with your customers, it could also result in losing them if the interaction does not meet their expectations. So, how can you manage this without being too intrusive into the private lives of your customers? For that you must find the right balance between making sure that experiences are intimate, while being invisible at the same time, and with being intelligent and embedded in the customers' lives. All this sounds paradoxical, but it's important to find the right balance between these elements. This requires a completely new approach and mindset for marketers.

Most spent between €100 – €500 over the last 3 months

1000+ euros
- 55-74 years: 3%
- 25-54 years: 6%
- 16-24 years: 2%

500-999 euros
- 55-74 years: 3%
- 25-54 years: 6%
- 16-24 years: 4%

100-499 euros
- 55-74 years: 12%
- 25-54 years: 23%
- 16-24 years: 20%

50-99 euros
- 55-74 years: 6%
- 25-54 years: 11%
- 16-24 years: 14%

Less than 50 euros
- 55-74 years: 4%
- 25-54 years: 7%
- 16-24 years: 14%

Legend: ■ 55-74 years ■ 25-54 years ■ 16-24 years

Money spent by online shoppers in the previous 3 months, EU-28, 2017. Source: Eurostat, 2018.

Clothes & Sports and Travel remain most purchased online

Online shoppers per product/service category, EU-28, 2017. Source: Eurostat, 2018.

Category	2017	2016
Medicine	8%	7%
Travel and Holiday Accomodation	31%	29%
Tickets and events	22%	21%
Electronic Equipment	14%	13%
Media & Computer software	31%	28%
Household Goods	26%	24%
Food/Groceries	14%	12%
Clothes, sports goods	36%	34%

■ 2017 ■ 2016

ECOMMERCE EUROPE

25-54 year-olds purchase most frequently online

Purchased online in the last 12 months, EU-28, 2014-2017. Source: Eurostat, 2018.

Students & the highly educated shop online more regularly

- 77%
- 78%
- 80%
- 82%

- 61%
- 66%
- 67%
- 70%

- 66%
- 68%
- 69%
- 71%

- 46%
- 50%
- 50%
- 52%

2014   2015   2016   2017
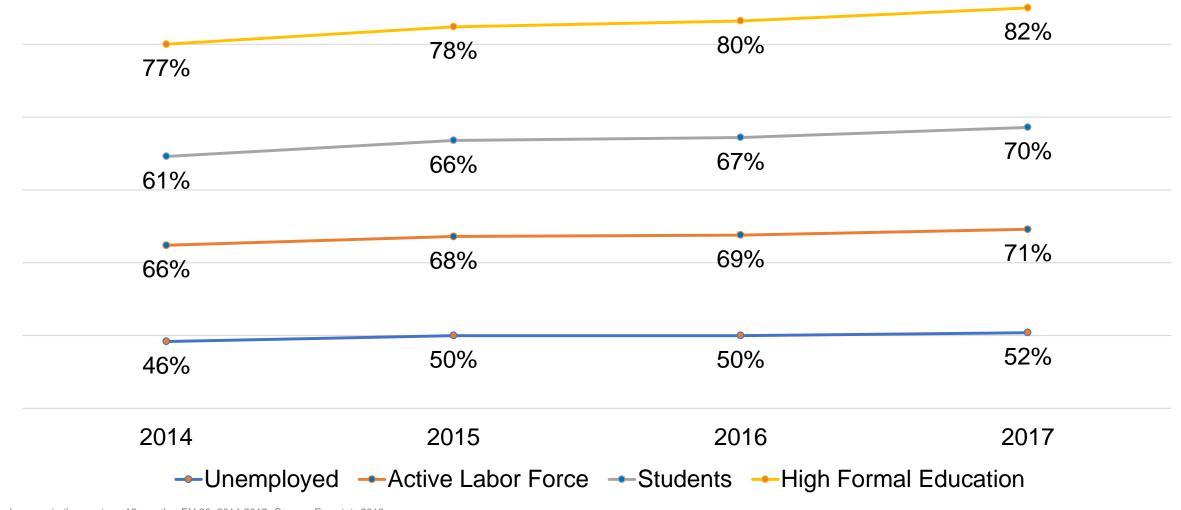
—●— Unemployed   —●— Active Labor Force   —●— Students   —●— High Formal Education

Online shoppers in the previous 12 months, EU-28, 2014-2017. Source: Eurostat, 2018.

Pieter Van den Broecke
Managing Director,
Benelux & Germany

Manhattan Associates®

Pieter holds this position at Manhattan Associates since 2008. Coming from a supply chain and logistics background he like no other understands the challenges retailers face in today's dunamic omnichannel landscape, where consumers are in the driver seat and running your supply chain. They want a personalized experience, you need a profitable business.

Before joining Manhattan Associates, he held various positions at i2 Technologies, a supply chain management software supplier, now JDA. Pieter Van den Broecke was one of the first employees of the European branch of i2 Technologies and he fulfilled the positions of Senior director Retail EMEA, Director Solution Consulting and Director Product Management.

www.manh.com

How do you see the Omnichannel experience working with ecommerce right now?

The rise of online shopping, click & collect and the world of social media has transformed the buying experience. Customers have access to information, expertise and validation at every step of the journey online but today they want an in-store and offline experience that complements and meets the same standards of excellence they have already typically experienced online. Whether it's an in-store associate tracking down stock in another store and organizing delivery to the customer's home, allowing a customer to return online purchases without complication in-store, or ringing the call center to change an existing order in-flight, today's consumers expect service excellence at every stage of the purchase cycle including in the store and on the phone.

The problem is, many retailers still perceive the customer journey to be one that is linear. This is not the case. Customers often flit between in-store and online, with social feedback, phone interaction and email for communication. They do not always buy where they browse, they may return elsewhere than where they bought and if they change their mind they'll expect the call center to step in or the store associate to figure it out.

Do you see social media platforms as a key pillar in the ecommerce consumer experience? In what ways can this be leveraged by ecommerce organizations?

Given today's digitally savvy retail customer is online and sharing content across social media platforms, they can make fantastic, ready-made brand ambassadors – but only if the experience is good enough.

These digitally active consumers expect real time access to ecommerce sites at any time with a great customer experience. They also expect to communicate with retail via social, sharing not only their joyous experiences but also their woes and strife. Social listening has become a vital tool for retail to ensure they jump on service issues rapidly and rectify them, converting a poor experience into a good one, quickly. And it's usually made public. Enabling retail employees with the tools to catch these hiccoughs on the fly is a key part of customer engagement and finessing the customer experience.

**Pieter Van den Broecke
Managing Director,
Benelux & Germany**

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www.manh.com

How can retailers adapt to these increased personalization of shopping experiences?

New technologies will enable retailers to combine these unstructured customer conversation data, like Twitter, Facebook and Instagram, with actual structured order information allowing store associates and call center representatives to improve service. Retailers have long struggled with multiple applications and disparate data points lacking a single, comprehensive view of the customer. Retailers are expected to harness new technologies to improve customer engagement which, alongside enterprise order management, will provide actionable insight into the omnichannel shopping experience for personalization and optimization across the buyer journey.

Generation Z: How do you see this new cohort impacting the Digital Trends and the retailers worldwide?

Gen Z now makes up approximately 9% of the current EU population (Eurostat, 2017) and they are demanding a slick retail experience. And this digital expectation of Gen Z is not just about their journey as a customer, they expect it as an employee too. If retailers want to attract the right talent, they also need to embrace a digital way of working.

Gen Z's digital skills are a major asset and they don't want to become frustrated when they can't access customer or product information at the touch of a button.

This single device generation will look askance when shown one system to check inventory, a separate iPad for recommendations, plus another fixed Electronic Point of Sale (EPOS) for processing sales transactions. If retailers are to engage Gen Z in 2018 and beyond, creating a digital native work environment will be key to attracting this generation as employees as well as consumers.

Western Europe

Ecommerce in The Netherlands

Quick introduction:

- Population: 17 million
- Currency: Euro
- VAT: 21%
- GDP per capita: €40,573
- LPI Ranking: 4
- E-government Dev. Index: 7
- Inclusive Internet Index: 14

Ecommerce facts & figures:

- Internet penetration: 96%
- % of e-Shoppers: 84%
- X-border shoppers: 36%
- E-GDP: 3.5%
- Growth 2016-2017:   13%

Ecommerce Environment:

Ecommerce is becoming an increasingly important revenue factor for the Dutch postal company, PostNL. Revenue derived from ecommerce logistics now accounts for 42% of the company's total turnover. Last year (2017), this share was 34%, which reveals an increase of 8%.*

Thuiswinkel 2018 / Ecommerce Foundation 2018 / *Ecommerce News, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
iDEAL	95%
Credit Card	50%
PayPal or similar	31%
Tikkie	22%

Delivery Method Preference/Use	
To your home in daytime	36%
In your mailbox by the mail carrier	25%
To your home in the evening	22%
Collect it yourself from a partner outlet or service point	10%

![MAZARS]

**Eric Klein Hesseling
International Tax Partner,
Netherlands**

What are the 3 main tips you give to foreign companies coming to the Netherlands? Specifically small- to mid-sized companies?

i) For your first impression check with the Netherlands Foreign Investment Agency (NFIA) in in your region (www.nfia.com) or (www.investinholland.com). (ii) No doubt that from a tax and business point of view the Netherlands is a good choice for service and distribution businesses and especially for e-commerce businesses. Let your choice to invest in the Netherlands predominantly depend on your business point of view: tax follows the business (and not the other way around). (iii) Hire high quality service firms (audit, accounting, tax, legal) with

experience in international business and with good language skills for your guidance.

Are there penalties for companies who do not comply with tax requirements in the Netherlands? If so, what are they and how much do they impact foreign companies?

Penalties can be imposed up to 100% (in case of fraud) of the additional imposed taxes. More in general the penalties amount 25% or a fixed amount in case of e.g. filing too late. They impact foreign companies equally compared to domestic companies. It is in general advised to hire professional financial service providers and in such case it should not be

necessary to experience serious penalties (other than regular administrative fines for late filing, etc.).

What effect do current tax systems/schemes have on ecommerce in the Netherlands? (i.e. equalization tax on turnover of digital companies, taxing untaxed or insufficiently taxed income from all internet-based business activities)

Provided well-structures there is no need for uncertain tax positions, equalization taxes and double taxation. The Netherlands follow international taxation rules with respect to taxation of e-commerce businesses.

**Franck Paucod
Partner, Head of Audit
Switzerland**

Do you feel Swiss consumer trust in online retailers is declining?

It's more the trust in the brand, in the products which are sold by the retailer, as the link between the retailer and the clients may be sensitive for data privacy. Overall, focusing on e-commerce, particularly for luxury products, the key issue in terms of trust are: are the products real, or counterfeit?

On the other hand, for brands, one of the issues with e-commerce, particularly for luxury brands, is the 'grey market'. I mean that they sell products to one specific country at a specific price, and finally these products are sold through a 'grey

market', a parallel distribution channel, to other regions of the world. This is something that luxury brands do not like, but we see it more and more with e-commerce.

Do you think there are economical benefits from online retailers becoming and/or remaining ethical?

The first objective of a business is to survive and make profit. This means that one of the concerns is to manage a reputation to make sure they will survive and continue to sell and make profit. Things they don't like in their reputation: to be in the media for a big scandal in connection with blood diamonds, etc.

More and more, companies are acting to protect their reputation.

How do companies manage ethical issues to protect their privacy, security, trust & intellectual property?

To manage the ethical issue and reputation raised, they first need to have a strong framework of procedures and internal controls. It begins with codes of conduct and strong rules, developed for each area. Management comes from having the right process in place, the right communication and the right training for your employees, particularly for those in ecommerce.

Ecommerce in Belgium

Quick introduction:

- Population: 11.5 million
- Currency: Euro
- VAT: 21%
- GDP per capita: €37,312
- LPI Ranking: 6
- E-government Dev. Index: 19
- Inclusive Internet Index: 16

Ecommerce facts & figures:

- Internet penetration: 88%
- % of e-Shoppers: 60%
- X-border shoppers: 40%
- E-GDP: 2.74%
- Growth 2016-2017: 15.6%
- % using Social Media: 65%

Ecommerce Environment:

In February 2008, eBay introduced a system to allow users in Belgium to register using an electronic identity card instead of a credit card. Using this government-issued electronic identity card, known as eID, provides greater proof of identity and security in exchange of electronic data.*

BeCommerce, 2018 / Ecommerce Foundation 2018 / *Export.gov

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Debit/Credit Card	55%
PayPal or similar	20%
Direct payment through bank	17%
Invoice in arrears	4%

Delivery Method Preference/Use	
Home delivery during the day	55%
Delivered to my mailbox by mail carrier	42%
Home delivery during the evening	27%
Collect it myself from a distribution point	25%

ECOMMERCE EUROPE

Ecommerce in The United Kingdom

Quick introduction:

- Population: 66.1 million
- Currency: Pound (GNP)
- VAT: 20%
- GDP per capita: €33,918
- LPI Ranking: 8
- E-government Dev. Index: 1
- Inclusive Internet Index: 7

Ecommerce facts & figures:

- Internet penetration: 95%
- % of e-Shoppers: 81%
- X-border shoppers: 36%
- E-GDP: 7.9%
- Growth 2016-2017:   8.26%

Ecommerce Environment:

Nuggets is developing an e-commerce payments and identity platform that stores users' personal and payment data securely on the Ethereum blockchain technology. Nuggets, a distributed ledger technology startup focused on payment and identity systems, has been endorsed by the United Kingdom's Department for International Trade, the Mayor of London and the City of London and invited on two major trade visits to China.*

Ecommerce Foundation, 2018 / *Nasdaq, 2018

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Online payment (e.g. PayPal, Amazon Payments)	71%
Direct Debit	68%
Credit card	50%
Prepaid cards/vouchers	17%

Delivery Method Preference/Use	
Home delivery during the day	72%
Delivered to my mailbox/multi-occupancy mailbox by carrier	42%
Home delivery during the evening	27%
Collect it myself from a distribution point	25%

Ecommerce in Luxembourg

Quick introduction:

- Population: 590 thousand
- Currency: Euro
- VAT: 17%
- GDP per capita: €83,794
- LPI Ranking: 2
- E-government Dev. Index: 25

Ecommerce facts & figures:

- Internet penetration: 97%
- % of e-Shoppers: 80.67%
- X-border shoppers: 79%
- E-GDP: 1.55%
- Growth 2016-2017: 10.61%

Ecommerce Environment:

- In 2017, Amazon Prime expanded to Luxembourg.*
- Of the three leading e-retailers dominating most recent cross-border e-commerce purchases, a survey from IPC of 31 markets revealed that Amazon is the top pick in Luxembourg (72%).**
- 35% of Luxembourg online purchases took 2-3 days to arrive.***

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Mobiles	51%
Credit Cards	37%
E-wallets	10%
Bank Transfer	1%

Country of Most Recent Purchase***	2017
Germany	72%
France	12%
Belgium	4%

Ecommerce in France

Quick introduction:
- Population: 65 million
- Currency: Euro
- VAT: 20%
- GDP per capita: €33,351
- LPI Ranking: 16
- E-government Dev. Index: 10
- Inclusive Internet Index: 6

Ecommerce facts & figures:
- Internet penetration: 88%
- % of e-Shoppers: 67%
- X-border shoppers: 28%
- E-GDP: 3.78%
- Growth 2016-2017:   14.3%

Ecommerce Environment:
A growing number of consumers expect free shipping; Language matters, as most consumers expect a localized service, therefore translating websites into French is best; Clothing and footwear lead the way, as apparel dominates product sales, while travel is the main service that its consumers buy online – however, France is also seeing rapid growth in areas that were previously less popular, like online grocery.*

Fevad, 2018 / Ecommerce Foundation, 2018 / Fevad, 2017 / Statista, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Credit Card	62%
Online Payment (e.g. PayPal, Amazon Payments)	58%
Direct Debit	22%
Prepaid cards/vouchers	15%

Delivery Method Preference/Use	
Home or workplace delivery	85%
Shipping to a pick-up & go location	85%
Delivery in-store (click & collect)	36%
Delivery in deposit	11%

Ecommerce in Germany

Quick introduction:

Population:	82.1 million
Currency:	Euro
VAT:	19%
GDP per capita:	€35,256
LPI Ranking:	1
E-government Dev. Index:	15
Inclusive Internet Index:	12

Ecommerce facts & figures:

Internet penetration:	91%
% of e-Shoppers:	77%
X-border shoppers:	25%
E-GDP:	3.11%
Growth 2016-2017:	9.50%
% using Social Media:	41%

Ecommerce Environment:

German consumers value familiarity, and are much more likely to purchase from a recognized webshop rather than an international shop. To get around this, foreign retailers should ensure they have a .de domain if possible to instill a bit more trust and familiarity. Additionally, according to German law, consumers have a right to return their online purchases within 14 days with no explanation, which is something to consider when expanding to Germany.*

Händlerbund, 2018 / Ecommerce Foundation, 2018 / *Webinterpret, 2017

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	Delivery Method Preference/Use
Paypal or similar	DHL
Advance Payment	HERMES
Credit Card	DPD
Purchase on account	GLS

Ecommerce in Ireland

Quick introduction:

- Population: 4.8 million
- Currency: Euro
- VAT: 23%
- GDP per capita: €64,695
- LPI Ranking: 18
- E-government Dev. Index: 26
- Inclusive Internet Index: 21

Ecommerce facts & figures:

- Internet penetration: 82%
- % of e-Shoppers: 53%
- X-border shoppers: 39%
- E-GDP: 2.31%
- Growth 2016-2017: 10.83%
- % using Social Media: 59%

Ecommerce Environment:

The top five countries currently important to Ireland are the United Kingdom, the United States, Germany, France and the Netherlands. This is probably due in large part to the fact that webshops in these countries (particularly the UK, Ireland and the Netherlands) are also in English. Additionally, 73% of Irish consumers are wary of having their personal information hacked, making it more important to display transparent privacy/security policies.*

Retail Excellence, 2018 / Ecommerce Foundation, 2018 / *Retail Excellence, 2018; eShopWorld, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Debit or Credit Card	79%
Mobiles	11%
E-wallets	6%
Bank Transfer	2%

Delivery method preference/use	
Delivery at home	79%
Delivery at work	20%
Delivery to a parcel shop	17%
Delivery to a post office / post station	12%

Northern Europe

Ecommerce in Denmark

Quick introduction:

- Population: 5.7 million
- Currency: Danish Krone (DKK)
- VAT: 25%
- GDP per capita: €46,669
- LPI Ranking: 17
- E-government Dev. Index: 9
- Inclusive Internet Index: 4

Ecommerce facts & figures:

- Internet penetration: 97%
- % of e-Shoppers: 80%
- X-border shoppers: 37%
- E-GDP: 3.86%
- Growth 2016-2017:   7.84%
- % using Social Media: 67%

Ecommerce Environment:

Danish consumers value their convenience when it comes to why they shop online. Two-fifths of consumers state the ability to shop whenever, wherever is the reason they choose online over physical retail stores for their last purchase. Furthermore, in comparison to other Nordic nations, Danes value a fast delivery experience with 2 days being a mental threshold for consumers. This is combined with a high desire for free returns. Logistical expectations are high, so you need to be ready as an e-tailer moving into the country.*

Ecommerce Foundation, 2018 / *PostNord, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Debit or Credit Card	74%
Mobiles	16%
PayPal or similar	4%
Direct payment through bank	2%

E-commerce spending per e-shopper	
2015	€1376
2016	€1871
2017	€2060
2018(f)	€2322

Ecommerce in Finland

Quick introduction:

- Population: 5.5 million
- Currency: Euro
- VAT: 24%
- GDP per capita: €35,705
- LPI Ranking: 15
- E-government Dev. Index: 5
- Inclusive Internet Index: N/A

Ecommerce facts & figures:

- Internet penetration: 94%
- % of e-Shoppers: 71%
- X-border shoppers: 44%
- E-GDP: 4.69%
- Growth 2016-2017: 8.53%
- % using Social Media: 51%

Ecommerce Environment:

When looking to the reason Finns shop online, the main reason stated is the selection available. This applies particularly to 18-29 year olds. In Finland, webshops tend to cover the cost of returns, and Finns are used to this when it comes to their ecommerce experience. Furthermore, when it comes to deliveries, Finns like to allocate a delivery time that suits them.*

Kauppa.FI, 2018 / Ecommerce Foundation, 2018 / *PostNord, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
PayPal or similar	61%
Invoice	52%
Credit Card	46%
Direct Debit	46%

E-commerce spending per e-shopper	
2015	€2052
2016	€2452
2017	€2502
2018(f)	€2713

Ecommerce in Latvia

Quick introduction:

- Population: 1.9 million
- Currency: Euro
- VAT: 21%
- GDP per capita: €12,692
- LPI Ranking: 29
- E-government Dev. Index: 23
- Inclusive Internet Index: N/A

Ecommerce facts & figures:

- Internet penetration: 82%
- % of e-Shoppers: 40%
- X-border shoppers: 20%
- E-GDP: 1.3%
- Growth 2016-2017: 11.26%
- % using Social Media: 53%

Ecommerce Environment:

From a general perspective, Latvians are less likely to shop online compared to the EU-28 (55% vs. 68%).* Those that do shop online do so mainly because of the better prices, the 24/7 nature of ecommerce and the ease of price comparison online. However, there are some barriers that still hamper the ecommerce process. Long delivery times, lack of product information and not finding the product at all represent the top 3 issues Latvian consumers face.**

Ecommerce Foundation, 2018 / *Eurostat, 2018; **Gemius, 2018

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Debit/Credit Card	43%
Mobiles	39%
E-wallets	14%
Bank Transfer	1%

Delivery Method Preference/Use	
Delivered to a post office / post station	71%
Delivered to home	57%
Delivered at home	17%
Delivered to a parcel shop	15%

ECOMMERCE EUROPE

Ecommerce in Lithuania

Quick introduction:

- Population: 2.8 million
- Currency: Euro
- VAT: 21%
- GDP per capita: €11,688
- LPI Ranking: 43
- E-government Dev. Index: 45
- Inclusive Internet Index: N/A

Ecommerce facts & figures:

- Internet penetration: 82%
- % of e-Shoppers: 46%
- X-border shoppers: 30%
- E-GDP: 1.13%
- Growth 2016-2017: 11.26%
- % using Social Media: 41%

Ecommerce Environment:

The top countries Lithuania imports from are Russia, Germany, Poland, Latvia and the Netherlands (in consecutive order). Additionally 90% of the purchases consumers make online are on a computer, and only 4% are on a smartphone.*

Ecommerce Foundation, 2018 / *Eurostat, eshopworld,, 2018

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Mobile	51%
Credit Cards	37%
E-wallets	1%
Bank Transfer	1%

Delivery Method Preference/Use	
At home	73%
To a post office/post station	50%
To a parcel locker station	38%
At work	21%

ECOMMERCE EUROPE

Ecommerce in Estonia

Quick introduction:

- Population: 1.3 million
- Currency: Euro
- VAT: 20%
- GDP per capita: €14,398
- LPI Ranking: 22
- E-government Dev. Index: 18
- Inclusive Internet Index: N/A

Ecommerce facts & figures:

- Internet penetration: 89%
- % of e-Shoppers: 58%
- X-border shoppers: 36%
- E-GDP: 1.08%
- Growth 2016-2017: 16.57%
- % using Social Media: 50%

Ecommerce Environment:

When looking at the economic environment for ecommerce, there are many potential upsides for companies thinking to move here. The local workforce is highly educated and flexible. When looking at logistical infrastructure however, there could be improvements in comparison to nearby countries such as Hungary and the Czech Republic.* Looking at the Digital Economy and Society Index, Estonia performs close to the EU-28 average when it comes to online transactions with regards to shopping. In fact, when looking at the weighted score of ecommerce turnover, Estonia performs better than the EU-28.**

Ecommerce Foundation, 2018 / *OECD, 2017; **Digital Agenda Data (EU), 2018.

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Mobiles	48%
Credit cards	31%
Bank Transfer	10%
E-wallets	8%

Delivery Method Preference/Use	
Delivered at home	57%
Delivered to a post office/ post station	51%
Delivered to home	13%
Invoice in arrears	4%

ECOMMERCE EUROPE

Ecommerce in Sweden

Quick introduction:

- Population: 9.91 million
- Currency: Swedish Krone (SEK)
- VAT: 25%
- GDP per capita: €46,259
- LPI Ranking: 3
- E-government Dev. Index: 6
- Inclusive Internet Index: 1

Ecommerce facts & figures:

- Internet penetration: 97%
- % of e-Shoppers: 81%
- X-border shoppers: 33%
- E-GDP: 3.10%
- Growth 2016-2017: 2.35%
- % using Social Media: 67%

Ecommerce Environment:

Swedish consumers are tech savvy and willing to try new avenues of ecommerce such as purchasing via their mobile phone (four out of ten online shoppers made one purchase per month via this method in 2017). There are 3 main areas that help Swedish companies sell online: the first is the advanced infrastructure in the nation, secondly there is the reputation of quality regarding Swedish made goods internationally and finally there is a high level of trust with modern payment systems.*

Ecommerce Foundation, 2018 / *PostNord, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Invoice	37%
Debit card or credit card	26%
Direct payment via bank	17%
PayPal or similar	8%

Delivery Method Preference/Use	
Pickup location	36%
Home delivery in the postbox	30%
Home delivery in the evening	11%
Home delivery outside the door	9%

Ecommerce in Norway

Quick introduction:

- Population: 5.3 million
- Currency: Norwegian Krone (NOK)
- VAT: 25%
- GDP per capita: €65,042
- LPI Ranking: 22
- E-government Dev. Index: 18
- Inclusive Internet Index: N/A

Ecommerce facts & figures:

- Internet penetration: 96%
- % of e-Shoppers: 75%
- X-border shoppers: 40%
- E-GDP: 3.05%
- Growth 2016-2017: 14.48%
- % using Social Media: 80%

Ecommerce Environment:

When it comes to the types of goods Norwegians buy, they have a particular love for sports. This is represented in their higher than average online purchases when it comes to sports goods. Also distribution points are a popular choice for Norwegian customers, with almost two-thirds utilizing them for picking up online goods. Since Norway is outside the EU, duty and VAT rules differ. VAT is added to imported goods valued over NOK 350.*

Virke, 2018 / Ecommerce Foundation, 2018 / *PostNord, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use		Delivery Method Preference/Use
Debit/Credit Card	59%	Pickup Point
PayPal or similar	17%	Home Delivery
Invoice	15%	Collect at store
Vipps (App)	7%	Parcel lockers

ECOMMERCE EUROPE

Central Europe

ECOMMERCE
EUROPE

Ecommerce in Czech Republic

Quick introduction:

- Population: 10.6 million
- Currency: Czech Koruna (CZK)
- VAT: 21%
- GDP per capita: €16,545
- LPI Ranking: 31
- E-government Dev. Index: 46
- Inclusive Internet Index: 23

Ecommerce facts & figures:

- Internet penetration: 85%
- % of e-Shoppers: 60.33%
- X-border shoppers: 11%
- E-GDP: 2.45%
- Growth 2016-2017: 11.73%
- % using Social Media: 46%

Ecommerce Environment:

The number of Czechs shopping online (65%) follows closely to the EU-28 average of 68%.* This trend of following the EU-28 average continues when it comes to the amounts spent on ecommerce in 2017. Looking to Q1 2018, Czech online consumers are in the top five countries within Europe when it comes to 'the willingness to shop'.** In fact, 43% of non-food and technical goods are sold via the internet.***

APEK, 2018 / Ecommerce Foundation, 2018 / *Eurostat, 2018; **GfK, 2018; ***Radio Praha, 2018

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Credit card	76%
E-wallets	10%
Bank Transfer	8%
Mobiles	3%

Delivery Method Preference/Use	
Delivery at home	83%
Delivered to a parcel shop	39%
Delivered to a post office/ post station	36%
Delivered at work	24%

ECOMMERCE EUROPE

Ecommerce in Slovakia

Quick introduction:

- Population: 5.4 million
- Currency: Euro
- VAT: 20%
- GDP per capita: €15,047
- LPI Ranking: 41
- E-government Dev. Index: 67
- Inclusive Internet Index: N/A

Ecommerce facts & figures:

- Internet penetration: 83%
- % of e-Shoppers: 59%
- X-border shoppers: 26%
- E-GDP: 0.83%
- Growth 2016-2017: 9.74%
- % using Social Media: 46%

Ecommerce Environment:

In Slovakia, Electronics & Media are the most lucrative segments. In 2017, almost 1/3 of purchases were made online in the most popular category of products, 'Consumer Electronics'.* Some of the most popular B2C and C2C online shopping destinations for Slovakians include Heureka, Alza, Aliexpress and Bazar.**

Ecommerce Foundation, 2018 / *Statista, 2018; **Similar Web, 2018

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Mobiles	76%
Prepaid cards	33%
Credits Card	17%
E-wallets	3%

Delivery Method Preference/Use	
Delivery at home	84%
Delivered to a parcel shop	18%
Delivered to a post office/ post station	35%
Delivered at work	22%

ECOMMERCE EUROPE

Ecommerce in Hungary

Quick introduction:

- Population: 9.7 million
- Currency: Forint (HUF)
- VAT: 27%
- GDP per capita: €8,606
- LPI Ranking: 31
- E-government Dev. Index: 46
- Inclusive Internet Index: 23

Ecommerce facts & figures:

- Internet penetration: 79%
- % of e-Shoppers: 41%
- X-border shoppers: 15%
- E-GDP: 2.11%
- Growth 2016-2017: 13.17%
- % using Social Media: 56%

Ecommerce Environment:

As with many countries, the most lucrative segments amongst online shoppers are Electronic and Media. In 2017, almost 13% of purchases were made online in the most popular category, 'Consumer Electronics'.* Some of the most popular B2C and C2C online shopping destinations for Hungarians include Jofogas, Arukereso, Vatera and Aliexpress.**

SzEK, 2018 / Ecommerce Foundation, 2018 / *Statista, 2018; **Similar Web, 2018

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Cash on delivery	52%
Domestic bank card/ debit card	51%
Digital wallet	46%
Bank Transfer	36%

Delivery Method Preference/Use	
Delivery at home	74%
Delivered to a parcel shop	32%
Delivered to a post office/ post station	26%
Delivered at work	19%

ECOMMERCE EUROPE

Ecommerce in Switzerland

Quick introduction:

- Population: 8.5 million
- Currency: Swiss Franc (CHF)
- VAT: 7.7%
- GDP per capita: €72,319
- LPI Ranking: 11
- E-government Dev. Index: 28
- Inclusive Internet Index: 22

Ecommerce facts & figures:

- Internet penetration: 95%
- % of e-Shoppers: 82%
- X-border shoppers: 61%
- E-GDP: 0.94%
- Growth 2016-2017: 8.70%
- % using Social Media: 48%

Ecommerce Environment:

In 2017, just over half (51%) of purchases were made online in the most popular product category, 'Consumer Electronics'.* Some of the most popular B2C and C2C online shopping destinations for the Swiss include Ricardo, Amazon.de, Anibis and Digitec.** Swiss consumers value privacy online, and this is reflected in their regulatory environment.***

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use		Delivery Method Preference/Use	
PayPal or similar		Delivered to my home	88%
Standard credit card		Delivered to a post office/post station	12%
Bank Transfer (Online)		Delivered at work	9%
Prepaid or rechargeable credit card		Delivered to the retailers store	4%

Ecommerce in Austria

Quick introduction:

- Population: 8.73 million
- Currency: Euro
- VAT: 20%
- GDP per capita: €37,024
- LPI Ranking: 7
- E-government Dev. Index: 16
- Inclusive Internet Index: 15

Ecommerce facts & figures:

- Internet penetration: 91.40%
- % of e-Shoppers: 46.75%
- X-border shoppers: 53%
- E-GDP: 2.41%
- Growth 2016-2017: 9.4%
- % using Social Media: 38.18%

Ecommerce Environment:

Online fashion is the most lucrative segment in Austria. In 2017, 14% of apparel purchases where made online.* Some of the most popular B2C and C2C online shopping destinations for Austrians include Amazon.de, Willhaben and eBay.** Recently, Austria signed a new trade agreement with China, enabling Austrian retailers easier access to the Chinese ecommerce market.***

Ecommerce Foundation, 2018 / *Statista, 2018; **Similar Web, 2018; ***Tamebay, 2018

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use
Credit Card
PayPal or similar
Online transfer
Sofort/ Klarna

E-commerce spending per e-shopper	
2015	€1753
2016	€1932
2017	€1659
2018(f)	€2289

ECOMMERCE EUROPE

Ecommerce in Poland

Quick introduction:

- Population: 38.1 million
- Currency: Polish Zloty (PLN)
- VAT: 23%
- GDP per capita: €11,158
- LPI Ranking: 33
- E-government Dev. Index: 36
- Inclusive Internet Index: 9

Ecommerce facts & figures:

- Internet penetration: 72%
- % of e-Shoppers: 49.33%
- X-border shoppers: 6%
- E-GDP: 1.65%
- Growth 2016-2017: 10.46%
- % using Social Media: 39%

Ecommerce Environment:

Fashion is the most lucrative ecommerce segment. In 2016, 16% of apparel purchases were made online.* Some of the most popular B2C and C2C online shopping destinations for Poles include Allegro, OLX and Ceneo.** Innovations in ecommerce are being tested in the region, with Zalando partnering with Zabka to provide pick-up locations for consumers.***

E-Commerce Poland, 2018 / Ecommerce Foundation, 2018 / *Statista, 2018; **Similar Web, 2018; RetailTechNews, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Online Payment	71%
Cash on delivery	47%
Credit Card	42%
Cash in advance	38%

Delivery Method Preference/Use	
Delivered to my mailbox	22%
Collect it myself from a distribution point	16%
Home delivery during the day/evening	65% / 29%
Collect it from the online store's physical store	14%

ECOMMERCE EUROPE

Ecommerce in Slovenia

Quick introduction:

- Population: 2.1 million
- Currency: Euro
- VAT: 22%
- GDP per capita: €19,324
- LPI Ranking: 50
- E-government Dev. Index: 21
- Inclusive Internet Index: N/A

Ecommerce facts & figures:

- Internet penetration: 80%
- % of e-Shoppers: 46%
- X-border shoppers: 27%
- E-GDP: 0.66%
- Growth 2016-2017:   10.37%
- % using Social Media: 46%

Ecommerce Environment:

Consumers in Slovenia are purchasing online, however if they choose not to, the main reasons are distrust and the fact they they are more familiar with physical stores. Of those who never shop online, 84% claim they prefer to see the product in-store, 42% do not want to share personal data on the internet, and 1/3 is concerned about the misuse of credit cares. Ensuring Slovenians that they are secure in shopping and offering free/easy returns will help alleviate their fears.*

Ecommerce Foundation, 2018 / *Netimperative, 2016.

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Prepaid card	63%
Mobiles	17%
Credit Card	10%
E-wallets	3%

Delivery Method Preference/Use	
Delivered to my home	85%
Delivered to a parcel shop	7%
Delivered to post office/ post station	23%
Delivered at work	11%

ECOMMERCE EUROPE

Eastern Europe

Ecommerce in Bulgaria

Quick introduction:

- Population: 7 million
- Currency: Bulgarian Lev (BGN)
- VAT: 20%
- GDP per capita: €6,292
- LPI Ranking: 72
- E-government Dev. Index: 52
- Inclusive Internet Index: 17

Ecommerce facts & figures:

- Internet penetration: 67.30%
- % of e-Shoppers: 26%
- X-border shoppers: 34.60 %
- E-GDP: 1.15%
- Growth 2016-2017: 21.74%
- % using Social Media: 97.02%

Ecommerce Environment:

Bulgarians prefer to buy fashion items online, with electronics and media coming up second. Popular destinations for online shopping include Miniprix, MyMall and Fashion Days as well as OLX, a popular C2C marketplace.* Consumer confidence (based on the Economic Sentiment Indicator) in Bulgaria is rather low, however, languishing in the bottom 3 of the EU as of March 2018.**

Bulgarian E-commerce Association, 2018 / Ecommerce Foundation, 2018 / *PFG Bulgaria, 2017; ** Statista, 2018.

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at
www.ecommercefoundation.org/reports

E-commerce spending per E-shopper (EUR)	
2016	€48,65
2017	€35,59
2018(f)	€40,49

Payment Method Preference/Use	
Cash on delivery	70%
Credit card	25%
Bank Payment/ Internet Banking	5%

ECOMMERCE EUROPE

Ecommerce in Serbia

Ecommerce Sales 2013 – 2017 (Euros, millions)

Quick introduction:

• Population:	8.7 million
• Currency:	Dinar (RSD)
• VAT:	20%
• GDP per capita:	€3,882
• LPI Ranking:	76
• E-government Dev. Index:	39
• Inclusive Internet Index:	N/A

Ecommerce facts & figures:

• Internet penetration:	72%
• % of e-Shoppers:	31%
• X-border shoppers:	7 %
• E-GDP:	0.92%
• Growth 2016-2017:	13.70%
• % using Social Media:	39%

Ecommerce Environment:

Electronics & Media is the biggest segment in Serbian ecommerce.* The top three shopping websites are Kupujemprodajem, Aliexpress and Kupindo.** Efforts have been made by various parties to accelerate and grow the ecommerce market in Serbia. One key area is the greater uptake in cashless payments. Ideas put forward to achieve this include implementation of effective regulatory frameworks, education for end-users, and further development of the infrastructure needed.***

Ecommerce Foundation, 2018 / *Statista, 2018; **SimilarWeb, 2018; ***Diplomacy & Commerce, 2017.

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use		Delivery Method Preference/Use	
Prepaid Cards	76%	Collected from Store	68%
Credit Cards	13%	Delivered Domestically	22%
Mobiles	8%	Other	8%
E-wallets	2%	Delivered Internationally	2%

Ecommerce in Romania

Quick introduction:

- Population: 19.5 million
- Currency: Romanian Leu (RON)
- VAT: 19%
- GDP per capita: €7,585
- LPI Ranking: 60
- E-government Dev. Index: 75
- Inclusive Internet Index: 26

Full version available at
www.ecommercefoundation.org/reports

Ecommerce facts & figures:

- Internet penetration: 70%
- % of e-Shoppers: 16%
- X-border shoppers: 3 %
- E-GDP: 1.88%
- Growth 2016-2017: 40%
- % using Social Media: 49%

Ecommerce Environment:

Ecommerce penetration in Romania falls short in comparison to the EU-28 average. Only 23% of Romanians bought online in 2017, compared to the 68% of the EU-28. 48% of Romanians stated they did not buy online due to the preference to 'shop in person, they like to see a product, loyalty to shops or force of habit'.* Electronics & Media are predicted to be the largest segments in 2018.**

Payment Method Preference/Use	
Credit Card	25%
Cash on delivery	70%
Bank Payment/ Internet Banking	5%

Delivery Method Preference/Use
Fan Courier
Urgent-Cargus
Posta Romana
Sameday

Ecommerce in Ukraine

Ecommerce Sales 2013 – 2017 (Euros, billions)

Quick introduction:
- Population: 44.2 million
- Currency: Ukrainian Hryvnia (UAH)
- VAT: 20%
- GDP per capita: €800

Ecommerce facts & figures:
- Internet penetration: 66%
- % of e-Shoppers: 44%
- X-border shoppers: 25%
- E-GDP: 4.5%
- Growth 2016-2017:   30.56%

Ecommerce Environment:
When it comes to online shopping in Ukraine, mobile devices reign supreme in terms of gaining access to the internet (approximately 2/3). The top four webshops (excl. marketplaces) in terms of audience reach are Rozetka (60.7%), Anno (16.4%), F.UA (6.6%), MOYO (5.6%) and 27.UA (2.3%). Rozetka's dominance increases further when considering attendance by unique users.*

Full version available at www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Credit Cards	44%
E-wallets	39%
Mobiles	16%
Other (Bank transfer & Prepaid Cards)	2%

Best Selling Ecommerce Retailers	
Aliexpress	70%
eBay	9%
Amazon	7%
H&M	3%

JSC Ukrainian Postal Service, 2018 / Ecommerce Foundation, 2018 / *Ukrainian Retail Association, 2018.

Ecommerce in Russia

Quick introduction:

- Population: 143 million
- Currency: Russian Ruble (RUB)
- VAT: 18%
- GDP per capita: €9,189
- LPI Ranking: 51
- E-government Dev. Index: 37
- Inclusive Internet Index: N/A

Full version available at
www.ecommercefoundation.org/reports

Ecommerce facts & figures:

- Internet penetration: 73%
- % of e-Shoppers: 55%
- X-border shoppers: 62%
- E-GDP: 2.18%
- Growth 2016-2017:   4.05%
- % using Social Media: 39%

Ecommerce Environment:

Fashion is projected to reign supreme in the Russian ecommerce sector, with 20% of sales being generated through the internet in 2018.* The most popular shopping destinations online are Avito, Aliexpress, Market.yandex, Wildberries and Dns-shop.** In order to plan an ecommerce strategy in the Russian market it is important to remember that price is still crucial for Russian consumers (24%).***

Ecommerce Foundation, 2018 / *Statista, 2018; **Similar Web,2018; ***KPMG, 2018. .

Payment Method Preference/Use	
Online payment (e.g. PayPal, Amazon Payments)	59%
Credit Card	39%
Cash in Advance	35%
By Invoice	35%

E-commerce spending per E-shopper	
2015	€531
2016	€581
2017	€622
2018(f)	€633

ECOMMERCE EUROPE

Southern Europe

Ecommerce in Croatia

Quick introduction:

• Population:	4.2 million
• Currency:	Croatian Kuna (HRK)
• VAT:	25%
• GDP per capita:	€11,147
• LPI Ranking:	51
• E-government Dev. Index:	37
• Inclusive Internet Index:	N/A

Ecommerce facts & figures:

• Internet penetration:	69%
• % of e-Shoppers:	29%
• X-border shoppers:	18 %
• E-GDP:	0.89%
• Growth 2016-2017:	10.74%
• % using Social Media:	47%

Ecommerce Environment:

In the Croatian e-commerce market, Electronics & Media are currently the main product category, followed closely by Fashion. By 2021, Electronics & Media are still expected to be the online category with the most sales, and Fashion is also forecasted to still be second. This indicates that the market is quite saturated in these product categories, making others quite open to new online retailers.*

Ecommerce Foundation, 2018 / *www.eshopworld.com

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Mobiles	61%
Credit cards	22%
E-wallets	9%
Bank Transfer	7%

Delivery Method Preference/Use	
Delivered to home	89%
Delivered to a post office/post station	26%
Delivered at work	11%
Delivered to the retailers store	3%

Ecommerce in Greece

Quick introduction:

- Population: 11.1 million
- Currency: Euro
- VAT: 24%
- GDP per capita: €17,374
- LPI Ranking: 21
- E-government Dev. Index: 22
- Inclusive Internet Index: 19

Ecommerce facts & figures:

- Internet penetration: 70%
- % of e-Shoppers: 36.40%
- X-border shoppers: 25%
- E-GDP: 2.67%
- Growth 2016-2017: 21.95%
- % using Social Media: 72%

Ecommerce Environment:

Greek ecommerce is growing quite steadily, and Greece has one of the higher rates for shopping both domestically *and* cross-border (50%). 15% of Greek consumers claim to shop cross-border only, which is quite high when compared to other European countries. This is a good indication that webshops selling cross-border into Greece will fair well, however it is more and more important to reach these consumers in their native Language.*

GRECA 2018 / Ecommerce Foundation, 2018 / *Statista, 2018

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	E-commerce spending per e-shopper	
Direct Debit	2015	€1556,7
Cash on delivery	2016	€1689,4
Credit card	2017	€1758,3
Wallets	2018(f)	€1818,8

ECOMMERCE EUROPE

Ecommerce in Italy

Quick introduction:

• Population:	59.3 million
• Currency:	Euro
• VAT:	22%
• GDP per capita:	€26,309
• LPI Ranking:	21
• E-government Dev. Index:	22
• Inclusive Internet Index:	19

Ecommerce facts & figures:

• Internet penetration:	70%
• % of e-Shoppers:	34%
• X-border shoppers:	15%
• E-GDP:	1.33%
• Growth 2016-2017:	17.33%
• % using Social Media:	52%

Ecommerce Environment:

Fashion is the most lucrative segment in online shopping. However, when looking at the share of those purchasing apparel items in 2017, only 5% were doing so online, demonstrating the importance of buying in-store for Italians.* Some of the most popular B2C and C2C online shopping destinations for Italians include Amazon.it, Subito and eBay.**

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Online Payment	73%
Prepaid Card/ Vouchers	45%
Credit Card	43%
Cash on delivery	22%

Delivery Method Preference/Use	
Delivered to my mailbox	23%
Home delivery during the Day/evening	77% / 17%
Delivery on workplace	13%
Unsure, I don't know	0%

Osservatorio eCommerce B2c Netcomm-School of Management del Politecnico di Milano, 2018 / Ecommerce Foundation, 2018 / *Statista, 2018; **Similar Web, 2018.

Ecommerce in Malta

Quick introduction:

- Population: 430,000
- Currency: Euro
- VAT: 18%
- GDP per capita: €20,856
- LPI Ranking: 56
- E-government Dev. Index: 30
- Inclusive Internet Index: N/A

Ecommerce facts & figures:

- Internet penetration: 81%
- % of e-Shoppers: 52%
- X-border shoppers: 50%
- E-GDP: 0.30%
- Growth 2016-2017: 7.25%
- % using Social Media: 79%

Ecommerce Environment:

Malta is more likely to participate in B2C rather than C2C ecommerce, as one study showed that only 4% have used a collaborative platform service, compared to the EU average (17%). Additionally, Malta is always in the top ten for cross-border purchasing (over 50%), indicating that Maltese shoppers are more than willing to shop from other EU countries – additionally, English is one of the official languages of Malta, making it easier for foreign retailers.*

Ecommerce Foundation, 2018 / *Statista, 2018

Ecommerce Sales 2013 – 2017 (Euros, millions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Credit Card	58%
E-Wallet	33%
Mobiles	3%
Prepaid Card	3%

E-commerce spending per E-shopper	
2015	€178
2016	€214
2017	€203
2018(f)	€218

Ecommerce in Portugal

Quick introduction:

- Population: 10.3 million
- Currency: Euro
- VAT: 23%
- GDP per capita: €17,387
- LPI Ranking: 36
- E-government Dev. Index: 38
- Inclusive Internet Index: 18

Ecommerce facts & figures:

- Internet penetration: 73.20%
- % of e-Shoppers: 36%
- X-border shoppers: 85%
- E-GDP: 2.57%
- Growth 2016-2017: 23.32%
- % using Social Media: 59%

Ecommerce Environment:

Fashion is the most lucatrive segment in online shopping. Although, only 7% purchased apparel items online in 2017, demonstrating the importance of purchasing in-store for Portuguese consumers.* Some of the most popular B2C and C2C online shopping destinations for the Portuguese include OLX, Custojusto, Aliexpress and eBay.**

acepi, 2018 / Ecommerce Foundation, 2018 / *Statista, 2018; **Similar Web, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
ATM	32.5%
Credit Card	25.5%
PayPal	21.9%

Delivery Method Preference/Use	
Delivered to home	78%
Delivery at work	26%
Delivery to a post-office, post-station	17%
Delivery to a parcel shop	9%

ECOMMERCE EUROPE

Ecommerce in Turkey

Quick introduction:

- Population: 80.4 million
- Currency: Turkish Lira (YTL)
- VAT: 18%
- GDP per capita: €5,594
- LPI Ranking: 34
- E-government Dev. Index: 68
- Inclusive Internet Index: 41

Ecommerce facts & figures:

- Internet penetration: 66%
- % of e-Shoppers: 53%
- X-border shoppers: 2%
- E-GDP: 2.13%
- Growth 2016-2017:   20.39%
- % using Social Media: 60%

Ecommerce Environment:

Amongst Turkish online shoppers, Electronics and Media are the most popular and lucrative segments.* Some of the most popular B2C and C2C online shopping destinations for Turks include Sahibinden, Hepsiburada, N11 and Gittigidiyor**. The potential of this market is demonstrated by recent rumblings that Amazon may be launching in the country soon.***

Ecommerce Foundation, 2018 / *Statista, 2018; **Similar Web, 2018; ***Tamebay, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
Credit Card	82%
Cash in advance	50%
Direct Debit	38%
Online payment	18%

E-commerce spending per E-shopper	
2015	€389
2016	€365
2017	€309
2018(f)	€387

ECOMMERCE EUROPE

Ecommerce in Spain

Quick introduction:

- Population: 46 million
- Currency: Euro
- VAT: 21%
- GDP per capita: €24,594
- LPI Ranking: 23
- E-government Dev. Index: 17
- Inclusive Internet Index: 12

Ecommerce facts & figures:

- Internet penetration: 85%
- % of e-Shoppers: 57%
- X-border shoppers: 27%
- E-GDP: 2.10%
- Growth 2016-2017: 15.23%
- % using Social Media: 54%

Ecommerce Environment:

Fashion is the most lucrative segment. 17% of those buying apparel items in 2017 purchased online, indicating the importance of the in-store experience when buying fashion items.* Some of the most popular B2C and C2C online shopping destinations for Spaniards include Amazon.es, Milanuncios, Aliexpress and eBay.** The potential in this market can be demonstrated by the expansion into the country by Richard Liu, the CEO of Chinese online retailer JD Group.***

Adigitial, 2018 / Ecommerce Foundation, 2018 / *Statista, 2018; **Similar Web, 2018; ***Jing Daily, 2018.

Ecommerce Sales 2013 – 2017 (Euros, billions)

Full version available at
www.ecommercefoundation.org/reports

Payment Method Preference/Use	
PayPal or similar	77%
Debit/Credit Card	50%
Cash on delivery	18%
Invoice in arrears	6%

Delivery Method Preference/Use	
Home delivery during the day/evening	53% / 46%
Delivered to my mailbox by mail carrier	30%
Delivery on workplace	11%
Unsure, I don't know	2%

ECOMMERCE EUROPE

MAZARS

Gareth Jones
Partner
United Kingdom

How do you foresee new and innovative technologies positively and/or negatively impacting smaller online retailers and/or entrepreneurs in the UK?

From my experience, technology is the most significant disruptor across all sectors. However, many smaller companies have been slow to embrace technology and therefore they aren't reaping the vast benefits that it can bring. When it comes to digitalization and implementing new systems, my clients often worry about the costs of investment, whether they have the staff with the required skills and the cost of maintaining systems. These items certainly require consideration, but for many, the return on investment will justify the cost.

With the right professional advice and a sound digital strategy, an enhanced digital presence is transformative – it opens up new markets, improves connectivity, provides a better understanding of their customer and ultimately drives top and bottom line growth.

What are some of the main challenges you see for small- to mid-sized online retailers in the UK?

Some of the areas where small and mid0sized businesses tend to fall down include:
- A lack of formal and long-term strategic planning
- A lack of formal and long-term strategic planning
- Quite often, value drivers and KPIs are

not identified and tracked
- Sometimes investments are made without a robust appraisal process so that expected returns are not quantified or tracked- or sometimes the investment isn't made at the right time
- Some companies find it difficult to be agile so that they are unable to reposition their product to make it more appealing to the changing market or changing customer preferences.

The best performing companies are those who make time to stand back and critically assess the strategic direction of their business over the next 3-5 years.

Anne Viard
Partner
Spain

Digitization by its very nature requires data. May 25, 2018 is a date put into almost every online company agenda, as GDPR marks a paradigm shift in data protection and privacy. What do you think about the challenges, costs and potential benefits of this regulation?

Legal developments will cause significant changes in companies with regards to their data processing and protection policy, as well as the irruption of the DPO figure (Data Protection Officer), who will gain much more relevance than to date. Although, in some cases, certain companies may consider that this new legislation only represents an increase of

costs and administrative burdens, recent cases of data breaches have raised awareness in most companies, who see that new legal developments will be a turning point to strengthen their data processing policies, increase transparency on consumer data processing and avoid reputational damages caused by data breach.

How close is Spain to moving towards 'Industry 4.0', the digitalization of every aspect of business? What key areas are lagging behind (related to ecommerce) and how do you believe these will be solved?

The majority of Spanish industrial companies are on a medium or low digitalization status and only a few Spanish industrial companies can be considered digital champions (their value chain is fully digitized and integrated). Regarding technologies in which Spanish companies are investing, and those that will have more potential in the future, we see that investments are being made on predictive technologies to maintain assets and products and implement digital systems to control and monitor manufacturing processes–known as MES. Meanwhile, those related to the IoT are considered to have the highest projection.

Ecommerce is greatly reshaping the business landscape and affecting actors in a majority of industries on many different levels, bringing new opportunities and challenges for all. It is important for actors to be prepared and knowledgeable about these aspects, and to find solutions. At Mazars, our experts advise clients on topics such as tax & legal, ethics & compliance, logistics & footprint, digitization & technology as well as business models and customer experience, all of which are evolving with the emergence of ecommerce. We see a great potential for those actors able to prepare for and respond to this new context.

Isabelle Massa
Global Head of Services Sectors

About the Report

About the Authors

Sara Lone

Research Coordinator

Sara received her Master's degree in Public Policy from the University of California, Irvine.

Her background consists of economic research and policy analysis, focusing on technology and sustainability in a digitally-globalized world. Sara oversees the Ecommerce Operations Research Team in creating country reports, custom research, content and webinars.

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Researcher

Adlen is an International Business and Management student at The Lille University of Sciences and Technology in France.

His interests in statistical analysis and marketing have inspired him to be a part of the Research Team at Ecommerce Operations, where he creates reports and designs marketing strategies for report-related content.

Shaun Packiarajah

Researcher

Shaun graduated with a Master's degree in Victimology and Criminal Justice from the University of Tilburg.

He works for the Research Team at Ecommerce Operations in creating research-related content and reports. His background is in policy creation and analysis, in addition to practical knowledge of business development.

Definitions related to the Internet, e-commerce & e-tailing

- **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 ecommerce**: percentage of ecommerce purchased at foreign sites

- **Ease of Doing Business Index**: The Ease of Doing Business Index is developed by the World Bank, and averages the country's percentile rankings on nine topics. It is made up of a variety of indicators, giving equal weight to each topic. The rankings for all economies are benchmarked to June 2010. The Index covers 185 countries.

- **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).

- **Economic Freedom Index**: the Index of Economic Freedom is an annual guide published by The Wall Street Journal and The Heritage Foundation, Washington's No. 1 think tank. For over a decade, the Wall Street Journal and The Heritage Foundation have tracked the march of economic freedom around the world with the influential Index of Economic Freedom. There are 5 categories, ranking from Free (with a score between 80 and 100) to Repressed (between 40 and 49.9).

- **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 ecommerce (GOMSEC):** aims to provide guidelines to measure and monitor B2C ecommerce in order to enable all European countries to provide data with respect to the penetration of B2C ecommerce in a standardized way.

- **E-Government Index:** The UN's E-Government Index provides a comparative assessment of the e-government development of UN Member States. One of the primary factors contributing to a high level of e-government development is concurrent past and present investment in telecommunication, human capital and provision of online services.

- **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.

Definitions related to the Internet, e-commerce & e-tailing

- **Market place:** online platform on which companies (and consumers) sell goods and/or services.

- **Logistics Performance Index (LPI):** The Logistics Performance Index (LPI) measures the "logistics friendliness" of 155 countries. It helps countries identify the challenges and opportunities they face in their trade logistics performance and what they can do to improve this. The Index is developed by the World Bank and is based on a worldwide survey of operators, such as global freight forwarders and express carriers.

- **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).

- **Networked Readiness Index (NRI):** The NRI measures the tendency for countries to exploit the opportunities offered by information and communications technology (IT). The NRI comprises three components: the environment for IT offered by a given country or community, the readiness of the country's key stakeholders to use IT, and the usage of IT among these stakeholders.

- **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.

- **Statcounter research method:** Statcounter is a web analytics service and their tracking code is installed on more than three million sites globally. These sites cover various activities and geographic locations. Every month, Statcounter records billions of page views to these sites. For each page view, they analyze the browser/operating system/screen resolution used and they establish if the page view is from a mobile device. They calculate their Global Stats on the basis of more than fifteen billion page views per month, by people from all over the world onto more than three million member sites.

Definitions related to the Internet, e-commerce & e-tailing

GOMSEC aims to provide **guidelines for measuring and monitoring B2C ecommerce**. As a result, **all countries worldwide** are able to provide data with respect to the penetration of B2C ecommerce in a standardized way. All Ecommerce Foundation figures and estimates are based on GOMSEC, unless stated otherwise.

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

These 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** is 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** to **31 December of each report year**. Growth rates are calculated and measured by the B2C ecommerce sales in the national currency.

Definition of B2C ecommerce 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 ecommerce

The following classification on the next few pages 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 ecommerce 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, catalogs, etc. B2C ecommerce includes Value Added Tax (VAT) or other sales tax, delivery costs and apps, but excludes returns.

Global Online Measurement Standard for B2C ecommerce (GOMSEC)

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 ands magazines (no single copy sales)

Electronics		
Consumer Electronics	*Information Technology (IT)*	*Household Electronics*
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

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

Toys
Indoor and outdoor toys

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

Global Online Measurement Standard for B2C ecommerce (GOMSEC)

Home & Garden
Furniture and kitchens
Floor and window coverings (e.g. curtains and blinds)
Home textiles
Cookware (sets), kettles and oven equipment
Table and kitchen articles
Articles for cleaning, wash and store
Decoration
Lamps and fixtures
DIY-articles
Garden articles
Flowers and plants (in home)

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

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

Other: Products
Cars components
Glasses and contact lenses
Stationery
Pictures and photo albums
Pet supplies
Erotica

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Global Online Measurement Standard for B2C ecommerce (GOMSEC)

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

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

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

Other: Services
New subscriptions to dating service
Other services

Sources used in the report

The report could only be realized by consulting a great number of valuable sources. These were 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 we have mentioned the different sources, definitions and outcomes of such reports, studies and interpretations.

The report is based on information that we consider reliable, but we cannot vouch for it being completely accurate or complete, nor should it be relied upon as such. Opinions expressed are our current opinions as of the date of this report.

Publications

- Central Bank   - UnCtad
- CIA World Fact Book   - United Nation
- DPD   - Wired
- E-commerce Poland   - Worldometers
- Ecommerce Foundation   - Ukroposhta
- Ukrstat   - Statistik Austria
- Osservatorio eCommerce B2c Netcomm-School of Management del Politecnico di Milano
- eCommerce Macedonia
- EHI Retail Institute
- Eurostat
- Handelsdaten.de
- Handelsverband/ KMU
- IMF
- INE & ACEPI/ IDC
- ITU.INT
- National Statistics Institute
- OCDE
- Office of National Statistics
- Paymentwall
- PostNord
- Quandl
- Royal Mail
- SBB (Statistics Norway)
- SlideShare
- Statista

ECOMMERCE EUROPE

About Ecommerce Operations

Our History
Ecommerce Operations is an independent organization, initiated by worldwide national ecommerce associations and online and omnichannel selling companies from industries such as retail, travel & finance.

Why Ecommerce Operations?
Our mission is to foster global digital trade as peace is the natural effect of trade. By facilitating digital commerce we hope to make the world a slightly better place.
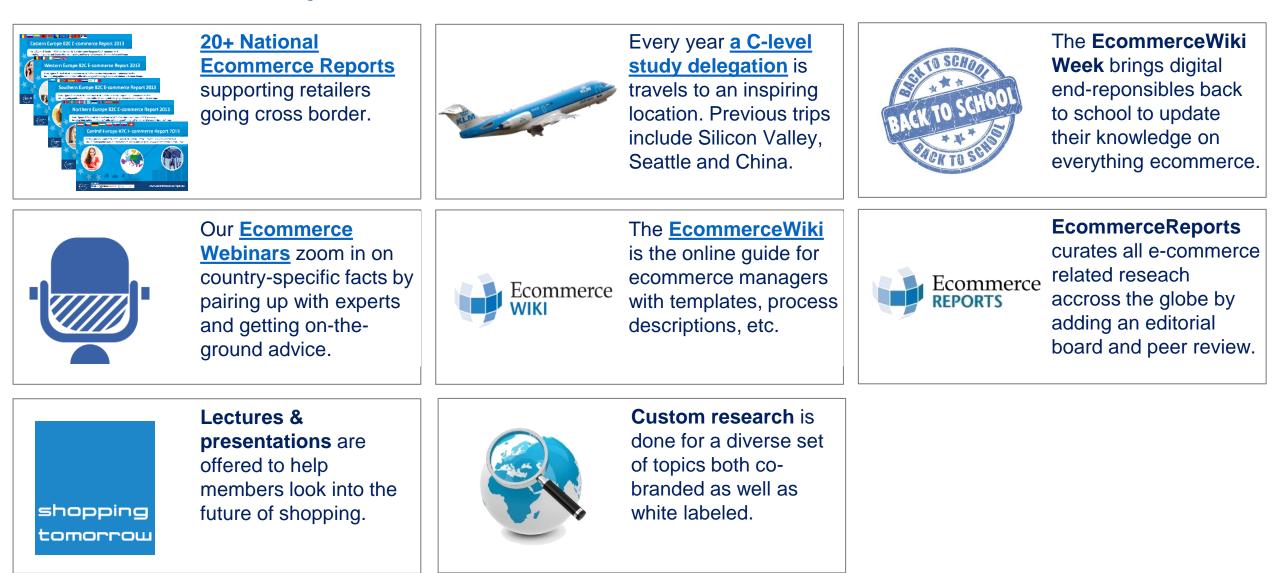
How does Ecommerce Operations help?
We facilitate the development of practical knowledge, insights and services for which individual institutions, retail and ecommerce associations and B2C selling companies do not have the (financial) resources and/or capabilities. By combining collective goals and efforts, Ecommerce Operations is able to realize projects which could not have been realized on an individual basis.

What does Ecommerce Operations do?
Ecommerce Operations has developed and offers several services such as the Ecommerce Benchmark, the EcommerceWiki and the National Ecommerce Reports.

Ecommerce Operations Services

20+ National Ecommerce Reports supporting retailers going cross border.

Every year **a C-level study delegation** is travels to an inspiring location. Previous trips include Silicon Valley, Seattle and China.

The **EcommerceWiki Week** brings digital end-reponsibles back to school to update their knowledge on everything ecommerce.

Our **Ecommerce Webinars** zoom in on country-specific facts by pairing up with experts and getting on-the-ground advice.

The **EcommerceWiki** is the online guide for ecommerce managers with templates, process descriptions, etc.

EcommerceReports curates all e-commerce related reseach accross the globe by adding an editorial board and peer review.

Lectures & presentations are offered to help members look into the future of shopping.

Custom research is done for a diverse set of topics both co-branded as well as white labeled.

About our Ecommerce Reports and where to find them…

The National Ecommerce Reports are published by Ecommerce Operations. They provide overviews of the mature and emerging markets in the field of ecommerce.

In total, Ecommerce Operations publishes multiple country reports and two overview reports per year, covering the most important ecommerce markets worldwide.

To have a tailor-made ecommerce report made, completely based on your wishes and requirements, please contact us via info@ecommercefoundation.org.

The full reports can be online purchased via: http://www.ecommerceoperations.org/reports.

Your feedback is very much appreciated. If you would like to help us make the 2018 reports even better, please take our 3-minute survey.

Also, consider becoming a member of Ecommerce Operations for even more services and opportunities to sell better globally.

Overview reports 2018
- European overview report
- Global overview report

2018 Country Reports
- Netherlands
- United Kingdom
- Italy
- France
- Germany
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- Sweden
- India
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- Australia

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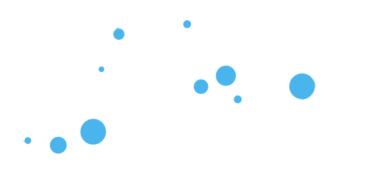**Contact**: info@ecommercefoundation.org
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