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

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

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

The Ecommerce Foundation’s B2C E-commerce Reports are an excellent example of this as they offer readers detailed, accurate and relevant information about e-commerce and other economic subjects in countries from all over the world. Their content includes figures that are based on the Global Online Measurement Standard for B2C E-Commerce (GOMSEC), interviews with e-commerce experts and clear tables and infographics.

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

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

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

Jorij Abraham
Director Ecommerce Foundation

Richard van Welie
Chief Editor Ecommerce Foundation
Our Report Partners

This report is created with help from the following partners

**Executed by:**

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

**Commissioned by:**

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

**In cooperation with:**

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

**Powered by:**

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

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 1,000 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.
E-commerce has continued to grow across countries and sectors. While in some market segments the growth in online sales has tended to slow down, the importance of touchpoints across diverse channels during the purchase journey has reached an extremely high level (depending on the category more than 60% of shoppers enjoy multichannel purchasing activities). Retail formats that deliver on this complexity will therefore be more successful in the future.

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

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

Retail formats of the future
Marketplaces are in good shape. They seem to meet shoppers’ expectations in terms of convenience and offer. The future of those that provide a variety of hybrid shopping formats, particularly if they are delivering on a mobile shopping experience, looks promising. Those that focus on only one channel are, however, expected to be less successful.

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

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

Outlook
The regions of the world are changing at different speeds. Former developing regions have become leaders in some respects – for example, in mobile shopping and payment where Europe is way behind. Retailers need to understand the success factors and the changing needs of individual shopper segments in order to succeed.
Europe is mostly a mature e-commerce market, but it changes and evolves constantly. For merchants, there is still plenty of opportunity for growth by expanding into new European markets. Especially the Southern and Eastern European regions include several emerging countries. However, the unique dynamics of the European marketplace do require careful consideration and planning.

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

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

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

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

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

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

Asendia connects cross-border retailers and consumers

Asendia is a leading international mail and goods shipping provider, making cross-border commerce easy and reliable for businesses and their customers.

Serving more than 200 destinations around the world with a local presence in Europe, Asia and the USA, Asendia’s comprehensive range of integrated e-commerce solutions helps retailers build brand recognition and provide an excellent shopping experience.

With 94 million consumers already shopping across borders, international commerce is thriving and is set to reach a turnover of €1.8trn by the end of 2015. Improving infrastructure and the democratization of technology is connecting cross-border retailers and consumers like never before, widening the opportunities available to both.

Encouraging online retailers to make the most of global commerce, Asendia has a dedicated e-commerce microsite at www.ecommerce.asendia.com. Available in five languages (English, Spanish, Italian, German and Swedish), the microsite provides expert knowledge and guidance for businesses, alongside details of Asendia’s full range of solutions.

Asendia can support businesses with their customer acquisition, online shops and returns, alongside managing and delivering their goods, mail, direct marketing and publications, enabling retailers to reach their customers efficiently and effectively, wherever they are in the world.

The microsite also contains a ‘FitCheck’, a self-assessment tool that allows businesses to find out how prepared they are for cross-border e-commerce, and how they can optimize the shopping experience for their users.

Microsite visitors can download a Pocket Guide to Cross-Border E-commerce, a 46-page guide to the best retail opportunities across the world. Providing useful hints and tips for running a successful cross-border business, the Guide looks at ten e-commerce markets in depth and advises retailers on how they can meet the needs and expectations of local shoppers.

As a joint venture between La Poste and Swiss Post, Asendia combines local knowledge and global insight, supporting ambitious e-commerce businesses with expert, sustainable solutions.

Manuel Bonnin
Head of Industry E-commerce & Distance Selling
at Asendia
Top 10 e-commerce countries in turnover (in billions of dollars)

1. China $538
2. USA $483
3. UK $169
4. Japan $136
5. Germany $95
6. France $75
7. Canada $28
8. Russia $27
9. Spain $22
10. Australia $21

* B2C & C2C goods & services, excluding insurances

Forecast 2015
$2,245 bn
Turnover E-commerce Goods & Services

Global
$1,938 bn +24%
Total B2C E-sales of Goods and Services 2014

Cross-border B2C E-commerce

Most popular countries:

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

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

GOMSEC
Global Online Measurement Standard B2C E-Commerce

“2.1 billion active social media accounts worldwide”

Average spending per e-shopper
$328bn
$1,702

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

Estimated share of online goods in total retail of goods
5.9%

72% of Internet users accessing the web through a mobile device worldwide

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### Overview of the Covered Countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Capital</th>
<th>VAT</th>
<th>Currency</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>Buenos Aires</td>
<td>21.0%</td>
<td>Peso (ARS)</td>
<td>41.8mn</td>
</tr>
<tr>
<td>Australia</td>
<td>Sydney</td>
<td>10.0%</td>
<td>Dollar (AUD)</td>
<td>23.5mn</td>
</tr>
<tr>
<td>Brazil</td>
<td>Rio de Janeiro</td>
<td>17.0%</td>
<td>Real (BRL)</td>
<td>202.0mn</td>
</tr>
<tr>
<td>Canada</td>
<td>Ottawa</td>
<td>5.0%</td>
<td>Dollar (CAD)</td>
<td>35.5mn</td>
</tr>
<tr>
<td>Chile</td>
<td>Santiago</td>
<td>19.0%</td>
<td>Peso (CLP)</td>
<td>17.8mn</td>
</tr>
<tr>
<td>China</td>
<td>Beijing</td>
<td>17.0%</td>
<td>Yuan (CNY)</td>
<td>1,364.3mn</td>
</tr>
<tr>
<td>India</td>
<td>New Delhi</td>
<td>12.5%</td>
<td>Rupee (INR)</td>
<td>1,267.4mn</td>
</tr>
<tr>
<td>Indonesia</td>
<td>Jakarta</td>
<td>10.0%</td>
<td>Rupiah (IDR)</td>
<td>252.8mn</td>
</tr>
<tr>
<td>Japan</td>
<td>Tokyo</td>
<td>8.0%</td>
<td>Yen (JPY)</td>
<td>127.1mn</td>
</tr>
<tr>
<td>Mexico</td>
<td>Mexico City</td>
<td>16.0%</td>
<td>Peso (MXN)</td>
<td>123.8mn</td>
</tr>
<tr>
<td>South Korea</td>
<td>Seoul</td>
<td>10.0%</td>
<td>Won (KRW)</td>
<td>50.4mn</td>
</tr>
<tr>
<td>United States</td>
<td>Washington D.C.</td>
<td>5.0%</td>
<td>Dollar (USD)</td>
<td>318.9mn</td>
</tr>
</tbody>
</table>

**Covered countries**

This table provides you with some relevant information regarding the countries that are covered in our global regional B2C e-commerce reports.

The countries mentioned in the table are selected for these reports because they are influential in their regions and the countries in orange are discussed in this Latin American B2C E-commerce Report.

For more information about the European markets, we refer you to the European regional B2C e-commerce reports that were published recently.

*China and India account for more than one third of the world’s population*
GDP real growth rate
The real growth rate of the Global Gross Domestic Product (GDP) was 2.4% in 2014. This was slightly lower than in the preceding year (2.8%). For 2015, the world economy is expected to recover a little, which is reflected in the forecast growth rate of 2.5%.

GROWTH RATE OF THE GLOBAL GDP
Percentage change, 2011 - 2015

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>4.5%</td>
</tr>
<tr>
<td>2012</td>
<td>2.8%</td>
</tr>
<tr>
<td>2013</td>
<td>2.8%</td>
</tr>
<tr>
<td>2014</td>
<td>2.4%</td>
</tr>
<tr>
<td>2015</td>
<td>2.5%</td>
</tr>
</tbody>
</table>

Sources: Ecommerce Foundation, Statista 2015 (1)

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

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

REGIONS IN TERMS OF SHARE eGDP
GDP at market prices and share of e-commerce in GDP of covered countries in report, 2014

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

Sources: Worldbank, Tradingeconomics, Statista, 2015
*The GDP for the major Asian-Pacific economies are actual. The other countries (including Taiwan, Philippines and Thailand) are based on our calculation from the 2012 figures from the Worldbank.
**eGDP real growth**

The share of e-commerce in the global GDP continued to increase last year. After reaching 2.0% in 2011, the eGDP grew steadily over the last few years, to 2.6% in 2014. The importance of e-commerce is expected to continue to gradually increase.

**eGDP**

In terms of the share of e-commerce in GDP per country, the UK and China are clearly above the rest, with a share of 5.7% and 5.2%, respectively. With this, their eGDP is about twice as high as that of the United States (2.8%).

It is interesting to note that the eGDP rates of the so-called BRICS countries in this list, except for China, are relatively low. Still, these countries are becoming increasingly important e-commerce markets and it is expected that their rates will increase significantly in the near future.

**TOP 12 COUNTRIES IN TERMS OF eGDP**

<table>
<thead>
<tr>
<th>Country</th>
<th>GDP at market prices</th>
<th>GDP per capita at market prices</th>
<th>Share of e-commerce in GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>$73,479bn</td>
<td>$27,650</td>
<td>2.6%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>$2,942bn</td>
<td>$45,700</td>
<td>5.7%</td>
</tr>
<tr>
<td>China</td>
<td>$10,360bn</td>
<td>$7,594</td>
<td>5.2%</td>
</tr>
<tr>
<td>Japan</td>
<td>$4,601bn</td>
<td>$36,194</td>
<td>2.9%</td>
</tr>
<tr>
<td>USA</td>
<td>$17,419bn</td>
<td>$54,629</td>
<td>2.8%</td>
</tr>
<tr>
<td>France</td>
<td>$2,829bn</td>
<td>$43,043</td>
<td>2.7%</td>
</tr>
<tr>
<td>Germany</td>
<td>$3,853bn</td>
<td>$46,763</td>
<td>2.5%</td>
</tr>
<tr>
<td>Australia</td>
<td>$1,454bn</td>
<td>$61,887</td>
<td>1.6%</td>
</tr>
<tr>
<td>Spain</td>
<td>$1,404bn</td>
<td>$30,290</td>
<td>1.6%</td>
</tr>
<tr>
<td>Canada</td>
<td>$1,787bn</td>
<td>$50,271</td>
<td>1.6%</td>
</tr>
<tr>
<td>South Korea</td>
<td>$1,410bn</td>
<td>$27,970</td>
<td>1.4%</td>
</tr>
<tr>
<td>Russia</td>
<td>$2,057bn</td>
<td>$15,411</td>
<td>1.3%</td>
</tr>
<tr>
<td>Mexico</td>
<td>$1,283bn</td>
<td>$10,361</td>
<td>1.0%</td>
</tr>
</tbody>
</table>

Sources: Worldbank, Tradingeconomics, Statista, 2015
Internet penetration per region
The average Internet penetration in the five global regions slightly increased to 48% in 2014. This resulted in 2.7 billion people being connected to the Internet.

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

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

Even though Asia-Pacific was the region with the lowest Internet penetration, there were three Asian-Pacific countries in the top 10. However, with only 18% of its 1.3 billion inhabitants being connected to the web, India significantly lowered the region’s average. In addition, at 49%, China’s Internet penetration was also quite low.
Population per region
The table below provides an overview of the global regions in terms of population. Asia-Pacific is clearly in the lead in this regard, with a total population of 5.1 billion people. This is mainly due to the presence of China and India, which together account for more than one third of the world’s population. When we look at the other continents, Europe ranked second with 817.5 million inhabitants, followed by North America (478.2 million).

REGIONS IN TERMS OF TOTAL POPULATION
Total population and number of households, 2014

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

Sources: Worldbank, Ecommerce Foundation, 2015

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

The gap between these two nations and the other countries is considerable. The United States ranked third with 318.9 million inhabitants, while Indonesia (252.8 million) and Brazil (202.0 million) completed the top 5.
Social media
As was the case in 2013, Facebook was again the most popular social media platform in 2014. In total, 1.2 billion people were active on Facebook.

LinkedIn ranked second with 259 million users, followed by Twitter with 232 million users. However, social media platforms such as Instagram and Pinterest are becoming more popular and grow significantly faster.

Other social media
In addition to the global social media, several countries/regions have their own versions. Some of these are taken over or integrated in global giants, such as Orkut, which was particularly popular in India and Brazil but which has now been integrated in Facebook.

In other countries, “local” social media do survive and even attract a lot of users. For instance in China, where global websites such as Facebook and Twitter are banned by the government. Chinese companies use this to their advantage and because of the large population, there are many social media with hundreds of millions of registered users in China.

Another example is Russia, in which vKontakte and Odnoklassniki attract millions of people. In contrast with China, other social media are allowed in Russia, but these two are still the most popular ones.
Mobile Commerce

Global B2C E-commerce

Mobile commerce

In China, m-commerce is already very popular. More than two thirds of Chinese e-shoppers have purchased an item through their smartphone. It is followed by Turkey and the United Arab Emirates, in which this rate amounts to more than 50%.

In addition, it is interesting to note how much m-commerce turnover increased in comparison with online commerce turnover.

# Top Ranking M-commerce Retailers

## Global B2C E-commerce

### M-COMMERCE TURNOVER
Total online mobile turnover worldwide, 2013

<table>
<thead>
<tr>
<th>Name Company</th>
<th>Country of origin</th>
<th>M-commerce turnover (2013)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon</td>
<td>USA</td>
<td>$16,800mn</td>
</tr>
<tr>
<td>Apple</td>
<td>USA</td>
<td>$14,000mn</td>
</tr>
<tr>
<td>JD</td>
<td>China</td>
<td>$5,800mn</td>
</tr>
<tr>
<td>Google Play</td>
<td>USA</td>
<td>$4,400mn</td>
</tr>
<tr>
<td>QVC</td>
<td>USA</td>
<td>$1,860mn</td>
</tr>
<tr>
<td>Walmart</td>
<td>USA</td>
<td>$1,430mn</td>
</tr>
<tr>
<td>Otto</td>
<td>Germany</td>
<td>$1,350mn</td>
</tr>
<tr>
<td>Suning Appliances</td>
<td>China</td>
<td>$1,350mn</td>
</tr>
<tr>
<td>Sears</td>
<td>USA</td>
<td>$900mn</td>
</tr>
<tr>
<td>Xiaomi</td>
<td>China</td>
<td>$900mn</td>
</tr>
</tbody>
</table>

Source: Statista, 2014

### Amazon biggest m-commerce company
The American e-commerce giant Amazon was the best-selling m-commerce company in the world in 2013. With a total annual turnover of $16.8bn through mobile devices, such as smartphones and tablets, Amazon was ahead of Apple ($14.0bn) and Chinese online shopping mall JD ($5.8bn).

With a total m-commerce turnover of nearly $1.4bn, German online shop Otto is the only European company in this top 10, which is mainly dominated by American companies. The difference between the top 2 companies and the rest is significant, but it is expected that particularly Chinese companies will more and more close this gap over the next few years.
**Share and Growth of Online Devices**

The global share of several online devices and their specific growth, 2014

<table>
<thead>
<tr>
<th>Device Type</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015 (f)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart Phone</td>
<td>18%</td>
<td>25%</td>
<td>32%</td>
<td>36%</td>
<td>38%</td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>9%</td>
<td>6%</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Tablet PC</td>
<td>4%</td>
<td>6%</td>
<td>7%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Desktop PC</td>
<td>14%</td>
<td>13%</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>LCD TV</td>
<td>4%</td>
<td>3%</td>
<td>13%</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Digital Still Camera</td>
<td>28%</td>
<td>26%</td>
<td>21%</td>
<td>21%</td>
<td>18%</td>
</tr>
</tbody>
</table>

**Global B2C E-commerce**

- **Smart Phone**: +8%
- **Mobile Phone**: +1%
- **Tablet PC**: -6%
- **Desktop PC**: -5%
- **LCD TV**: +2%
- **Digital Still Camera**: -15%
- **Other categories**: -5%
Global Retail E-commerce Index

The Global Retail E-commerce Index is published annually by global management consulting firm A.T. Kearney and contains the top countries in terms of e-commerce performance. It ranks countries in four areas: online market size, consumer behavior, growth potential and infrastructure.

Even though China surpassed the United States with regard to B2C e-commerce turnover, the US is still the most attractive online market in the world, according to this index.

Belgian and Danish e-commerce on the rise

One of the most interesting aspect of this index is the rise of Belgium. The Western European country climbed 15 positions in the global list and this was partly due to its score on growth potential. With this, Belgium is expected to continue to emerge in terms of B2C e-commerce.

Denmark also significantly improved its position as it rose by 13 positions to the 15th place. Among other things, the Northern European nation was the only country in the list to achieve a perfect score for consumer behavior. This indicates that Danish consumers are, for instance, tech-savvy and willing to spend money online.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Change in global rank</th>
<th>Country</th>
<th>Online market size (40%)</th>
<th>Consumer behavior (20%)</th>
<th>Growth potential (20%)</th>
<th>Infrastructure (20%)</th>
<th>Online market attractiveness score (100%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>+2</td>
<td>United States</td>
<td>100.0</td>
<td>83.2</td>
<td>22.0</td>
<td>91.5</td>
<td>79.3</td>
</tr>
<tr>
<td>2</td>
<td>-1</td>
<td>China</td>
<td>100.0</td>
<td>59.4</td>
<td>86.1</td>
<td>43.6</td>
<td>77.8</td>
</tr>
<tr>
<td>3</td>
<td>+1</td>
<td>United Kingdom</td>
<td>87.9</td>
<td>98.6</td>
<td>11.3</td>
<td>86.4</td>
<td>74.4</td>
</tr>
<tr>
<td>4</td>
<td>-2</td>
<td>Japan</td>
<td>77.6</td>
<td>87.8</td>
<td>10.1</td>
<td>97.7</td>
<td>70.1</td>
</tr>
<tr>
<td>5</td>
<td>+1</td>
<td>Germany</td>
<td>63.9</td>
<td>92.6</td>
<td>29.5</td>
<td>83.1</td>
<td>66.6</td>
</tr>
<tr>
<td>6</td>
<td>+1</td>
<td>France</td>
<td>51.9</td>
<td>89.5</td>
<td>21.0</td>
<td>82.1</td>
<td>59.3</td>
</tr>
<tr>
<td>7</td>
<td>-2</td>
<td>South Korea</td>
<td>44.9</td>
<td>98.4</td>
<td>11.3</td>
<td>95.0</td>
<td>58.9</td>
</tr>
<tr>
<td>8</td>
<td>+5</td>
<td>Russia</td>
<td>29.6</td>
<td>66.4</td>
<td>51.8</td>
<td>66.2</td>
<td>48.7</td>
</tr>
<tr>
<td>9</td>
<td>+15</td>
<td>Belgium</td>
<td>8.3</td>
<td>82.0</td>
<td>48.3</td>
<td>81.1</td>
<td>45.6</td>
</tr>
<tr>
<td>10</td>
<td>-1</td>
<td>Australia</td>
<td>11.9</td>
<td>80.8</td>
<td>28.6</td>
<td>84.8</td>
<td>43.6</td>
</tr>
<tr>
<td>11</td>
<td>-1</td>
<td>Canada</td>
<td>10.6</td>
<td>81.4</td>
<td>23.6</td>
<td>88.9</td>
<td>43.1</td>
</tr>
<tr>
<td>12</td>
<td>+2</td>
<td>Hong Kong</td>
<td>2.3</td>
<td>93.6</td>
<td>13.0</td>
<td>100.0</td>
<td>42.2</td>
</tr>
<tr>
<td>13</td>
<td>+6</td>
<td>Netherlands</td>
<td>8.9</td>
<td>98.8</td>
<td>8.1</td>
<td>84.6</td>
<td>41.8</td>
</tr>
<tr>
<td>14</td>
<td>-3</td>
<td>Singapore</td>
<td>1.3</td>
<td>89.4</td>
<td>15.7</td>
<td>100.0</td>
<td>41.5</td>
</tr>
<tr>
<td>15</td>
<td>+13</td>
<td>Denmark</td>
<td>8.1</td>
<td>100.0</td>
<td>15.1</td>
<td>75.5</td>
<td>41.4</td>
</tr>
</tbody>
</table>

Source: Atkearney, 2015
**Global Market Places**

**Global B2C E-commerce**

**Rise of global market places**

Global market places are online platforms on which companies (and consumers) sell goods and/or services. There are already a lot of different online market places, but the most famous ones are Amazon, Alibaba and eBay. Other important e-commerce platforms include Facebook, Google, Flipkart (India) and MercadoLibre (Argentina).

That market places are becoming increasingly important is evident from these two graphs. The one on the left shows that Amazon is already larger, in terms of e-commerce turnover, than the other companies in the American Top 12 of e-retailers combined. The graph below shows that Alibaba’s Gross Merchandise Volume, or turnover that is facilitated on its platform, is about the same size as the Gross Domestic Products of countries such as Finland or the Philippines.

---

**Top 15 E-retailers in the US**

Top e-retailers on the basis of e-commerce sales, in billions of US dollars, 2015

- Amazon.com Inc.: $67.9
- Apple Inc.: $18.3
- Staples Inc.: $10.4
- Walmart.com: $10.0
- Sears Holdings Corp.: $4.9
- Liberty Interactive Corp.: $4.8
- Netflix Inc.: $4.4
- Macy’s Inc.: $4.2
- Office Depot Inc.: $4.1
- Dell Inc.: $3.6
- CDW Corp.: $3.4
- OfficeMax Inc.: $3.2
- W.W. Grainger Inc.: $3.1
- Costco Wholesale Corp.: $3.1
- Best Buy Co.: $3.0

Source: Statista, 2015

**Gross Merchandise Volume**

Gross Merchandise Volume of Alibaba, Amazon and eBay, compared to GDPS of Finland and Philippines, in billions of dollars, 2015

Global Market Places
Global B2C E-commerce

Retailers vs. market places
Global market places have become so important within online retail that they cannot be ignored anymore. Their influence in the market continues to grow. Research by the Ecommerce Foundation shows that retailers believe that global market places will own 40% of the global online retail market in 2020.

Still, retailers are very positive about their future and they are mostly positive about the influence of market places. According to the aforementioned Rise of the Global Market Places study, especially the impact of Apple, Google and Facebook is met with confidence by retailers. The main reason for this confidence is because retailers believe they perform better than online market places, especially in customer-facing processes.

Dealing with online market places
However, online market places also pose a threat to other retailers, as they can offer lower prices and larger ranges to customers. Still, online retailers can definitely benefit from the e-commerce platforms.

For instance, market places can be of great help when an online shop wants to expand its business cross-border. At relatively low costs, companies can offer their goods and/or services to foreign consumers without having to set up an office abroad or translating their website first.

For more detailed information about global market places, please go to ecommercefoundation.org for the Rise of the Global Market Places report.

Influence of Online Market Places
Influence of market places according to retailers, with 1 being very negative and 5 being very positive, 2015


<table>
<thead>
<tr>
<th>Market Place</th>
<th>Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alibaba</td>
<td>2.84</td>
</tr>
<tr>
<td>Amazon</td>
<td>2.88</td>
</tr>
<tr>
<td>Apple</td>
<td>3.46</td>
</tr>
<tr>
<td>Google</td>
<td>3.78</td>
</tr>
<tr>
<td>Facebook</td>
<td>3.79</td>
</tr>
<tr>
<td>MercadoLibre</td>
<td>2.99</td>
</tr>
<tr>
<td>eBay</td>
<td>3.04</td>
</tr>
<tr>
<td>Rakuten</td>
<td>3.0</td>
</tr>
</tbody>
</table>
An Overview of B2C E-commerce Markets of Goods & Services in Latin America
Latin America

Key B2C E-commerce Data of Goods and Services at a Glance 2014

Latin America $37.4 bn +18.2%
Asia-Pacific $770.0 bn +44.3%
Europe $562.0 bn +13.6%
North America $522.9 bn +12.2%
MENA $21.0 bn +21.5%
Total B2C E-commerce of Goods & Services 2014

Estimated share of online goods in total retail of goods 2%

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

47% Services
53% Goods

Estimated 44% of active Internet users are on social media

National e-commerce associations:
- Argentina
- Brazil
- Chile

Average spending per e-shopper

66mn e-households

Ranking covered Countries in turnover (in millions of USD)
1. Brazil $20,970
2. Argentina $4,450
3. Chile $2,000

Total e-commerce turnover

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Twitter: @Ecomfound
Free download at: https://www.ecommercefoundation.org/reports
Chile’s Internet penetration is as high as the average European rate

**Latin America**

### Internet Penetration

<table>
<thead>
<tr>
<th></th>
<th>Internet penetration*</th>
<th>Total Population</th>
<th>Online population*</th>
<th>Number of households</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Global</strong></td>
<td>48%</td>
<td>7,222.6mn</td>
<td>2,737.1mn</td>
<td>2,210.8mn</td>
</tr>
<tr>
<td><strong>Europe</strong></td>
<td>72%</td>
<td>817.5mn</td>
<td>490.9mn</td>
<td>331.7mn</td>
</tr>
<tr>
<td><strong>Latin America</strong></td>
<td>61%</td>
<td>393.6mn</td>
<td>183.9mn</td>
<td>65.9mn</td>
</tr>
<tr>
<td><strong>Chile</strong></td>
<td>72%</td>
<td>17.8mn</td>
<td>10.2mn</td>
<td>5.3mn</td>
</tr>
<tr>
<td><strong>Argentina</strong></td>
<td>65%</td>
<td>41.8mn</td>
<td>20.3mn</td>
<td>12.0mn</td>
</tr>
<tr>
<td><strong>Brazil</strong></td>
<td>58%</td>
<td>202.0mn</td>
<td>88.7mn</td>
<td>64.1mn</td>
</tr>
</tbody>
</table>

*excluding people aged 0-14

Sources: National Statistical Offices, Eurostat, Worldbank and Ecommerce Foundation Research
The growth rate of Latin America’s GDP decreased considerably

### Latin America Gross Domestic Product (GDP)

<table>
<thead>
<tr>
<th>Country</th>
<th>GDP at market prices</th>
<th>GDP per capita at market prices</th>
<th>Share of e-commerce in GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>$73,479bn</td>
<td>$27,650</td>
<td>2.6%</td>
</tr>
<tr>
<td>Europe</td>
<td>$22,663bn</td>
<td>$34,151</td>
<td>2.5%</td>
</tr>
<tr>
<td>Latin America</td>
<td>$4,494bn</td>
<td>$11,964</td>
<td>0.8%</td>
</tr>
<tr>
<td>Brazil</td>
<td>$2,346bn</td>
<td>$11,613</td>
<td>0.9%</td>
</tr>
<tr>
<td>Argentina</td>
<td>$540bn</td>
<td>$12,922</td>
<td>0.8%</td>
</tr>
<tr>
<td>Chile</td>
<td>$258bn</td>
<td>$14,520</td>
<td>0.8%</td>
</tr>
</tbody>
</table>


### Growth Rate of Latin America GDP

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>7.6%</td>
</tr>
<tr>
<td>2011</td>
<td>6.0%</td>
</tr>
<tr>
<td>2012</td>
<td>2.7%</td>
</tr>
<tr>
<td>2013</td>
<td>3.3%</td>
</tr>
<tr>
<td>2014</td>
<td>0.8%</td>
</tr>
</tbody>
</table>

Country Report Argentina 2015

Argentina 2014 Key data at a glance

**Average spending per e-shopper**: $462

**E-commerce GDP**: 0.82%
**Total GDP**: $540.2bn

**Argentinian Trustmark**:
**Argentinian national E-commerce association**: cace

**Latin America**: $37.4 bn +18.2%
**North America**: $552.9 bn +12.2%
**Europe**: $562.0 bn +13.6%
**MENA**: $21.0 bn +21.5%
**Asia-Pacific**: $770.0 bn +44.3%
**Argentina**: $4.5 bn +20.2%

Total B2C Ecommerce 2014 of goods & services

**Position Argentina in Global gEconomy ranking**
1. United Kingdom 5.74%
   2. China 5.19%
   3. Japan 2.94%
   4. Brazil 0.89%
   5. Argentina 0.82%
   6. Italy 0.82%
   7. Chile 0.78%

**Ranking covered Countries in turnover (USD million)**
1. Brazil $20,970
2. Argentina $4,450
3. Chile $2,000

**Forecast 2015**
**Turnover E-commerce Goods & Services**
- **Latin America**: $37.4 bn +18.2%
- **North America**: $552.9 bn +12.2%
- **Europe**: $562.0 bn +13.6%
- **MENA**: $21.0 bn +21.5%
- **Asia-Pacific**: $770.0 bn +44.3%
- **Argentina**: $4.5 bn +20.2%

Total B2C Ecommerce 2014 of goods & services

**Estimated share of online retail of goods in total retail of goods**: 1.6%

Estimated 54% of the online population is on social media

**People live in Argentina**: 41.8 million
**Internet users**: 20.3 million
**E-shoppers**: 9.6 million

*excluding people aged 0-14

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- Ingenico
- globalcollect
- ASENDIA

21.0 bn to 105x400
21.0 bn to 105x400
21.0 bn to 105x400
21.0 bn to 105x400
AGE STRUCTURE
Population by age category, 2014

<table>
<thead>
<tr>
<th>Age Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-14</td>
<td>24.9%</td>
</tr>
<tr>
<td>15-24</td>
<td>15.7%</td>
</tr>
<tr>
<td>25-54</td>
<td>38.9%</td>
</tr>
<tr>
<td>55-64</td>
<td>9.1%</td>
</tr>
<tr>
<td>65+</td>
<td>11.4%</td>
</tr>
</tbody>
</table>

Total population: 41,803,000

Median age:
- Male: 30.1 years
- Female: 32.3 years

Population growth: 0.86%

Institution: Republic
Internet access: 65%
Official language: Spanish
Widely spoken foreign language(s): Italian, English, German and French
URL country code: .ar
Dialing Code: +54

Sources: World Bank and Wikipedia, 2015

The Argentinian GDP per capita declined in 2014

### GROSS DOMESTIC PRODUCT
Total GDP at market prices, 2010-2014

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP (in millions of US dollars)</th>
<th>GDP (in millions of pesos)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>$540,197</td>
<td>ARS4,364,795</td>
</tr>
<tr>
<td>2013</td>
<td>$622,058</td>
<td>ARS5,026,228</td>
</tr>
<tr>
<td>2012</td>
<td>$607,712</td>
<td>ARS4,910,312</td>
</tr>
<tr>
<td>2011</td>
<td>$559,849</td>
<td>ARS4,523,580</td>
</tr>
<tr>
<td>2010</td>
<td>$462,844</td>
<td>ARS3,739,778</td>
</tr>
</tbody>
</table>

Source: Worldbank, Eurostat and IMF World Economic Outlook, 2015

### GROSS DOMESTIC PRODUCT REAL GROWTH RATE
Percentage change of GDP, 2011-2015

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015 (f)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP</td>
<td>8.4%</td>
<td>0.8%</td>
<td>2.9%</td>
<td>0.5%</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

### GROSS DOMESTIC PRODUCT PER CAPITA
At current prices, 2010-2014

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP per capita (USD)</th>
<th>GDP per capita (ARS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>$12,992</td>
<td>ARS104,413</td>
</tr>
<tr>
<td>2013</td>
<td>$15,009</td>
<td>ARS121,271</td>
</tr>
<tr>
<td>2012</td>
<td>$14,791</td>
<td>ARS119,510</td>
</tr>
<tr>
<td>2011</td>
<td>$13,746</td>
<td>ARS111,066</td>
</tr>
<tr>
<td>2010</td>
<td>$11,464</td>
<td>ARS92,628</td>
</tr>
</tbody>
</table>

Source: Worldbank, Eurostat and IMF World Economic Outlook, 2015

Explanation

The Argentinian GDP is expected to grow by 1.1% in 2015. This real growth rate takes the inflation rate into account.
In 2014, Argentinian B2C e-commerce sales nearly doubled compared to 2011.

Country Report Argentina

**B2C E-COMMERCE AND GROWTH RATE**
Total online turnover of goods and services, in millions of dollars, and its growth rate 2011-2015

**Explanation**
Compared to the preceding year, Argentinian B2C e-commerce sales are expected to grow by 17.9% in 2015.

**B2C E-COMMERCE SALES**
Total online sales of goods and services, 2011-2015

<table>
<thead>
<tr>
<th>Year</th>
<th>B2C e-commerce turnover (in millions of ARS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015 (f)</td>
<td>ARS42,400</td>
</tr>
<tr>
<td>2014</td>
<td>ARS35,960</td>
</tr>
<tr>
<td>2013</td>
<td>ARS29,906</td>
</tr>
<tr>
<td>2012</td>
<td>ARS28,145</td>
</tr>
<tr>
<td>2011</td>
<td>ARS20,782</td>
</tr>
</tbody>
</table>

Source: Emarketer and Ecommerce Foundation, 2015

Source: Ecommerce Foundation, 2015
The share of mobile in online sales is quite low

Country Report Argentina

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car insurance</td>
<td>1%</td>
</tr>
<tr>
<td>Travel: Leisure Flights</td>
<td>1%</td>
</tr>
<tr>
<td>Laptop/Tablet</td>
<td>4%</td>
</tr>
<tr>
<td>Cinema Tickets</td>
<td>7%</td>
</tr>
<tr>
<td>Travel: Hotel Stays</td>
<td>11%</td>
</tr>
<tr>
<td>Clothing &amp; Footwear</td>
<td>12%</td>
</tr>
<tr>
<td>TV Sets</td>
<td>19%</td>
</tr>
</tbody>
</table>

**Explanation**

Of all online purchases in the Laptop/Tablet category, 4% were made through a mobile device in Argentina in 2014.

Source: Google Barometer, 2015

31% of the population owns a smartphone

Source: Wearesocial, 2014
### VAT OVERVIEW

**Information on Argentinian VAT**

<table>
<thead>
<tr>
<th>VAT overview</th>
<th>Argentina</th>
</tr>
</thead>
</table>
| Threshold for registration | $31,119.30 for goods (ARS300,000)  
                          $20,746.20 for services (ARS200,000)  
                          IIBB no threshold |
| Standard VAT rate | 21% |
| Where to register | VAT Federal Administration for Public Revenues |
| Periods for declaration | Monthly |

#### Reduced VAT rates

<table>
<thead>
<tr>
<th>Rate</th>
<th>Applies to, among other things:</th>
</tr>
</thead>
</table>
| 27% (special high rate) | • Telecoms  
                          • Water  
                          • Energy and gas |
| 10.5% | • Medical  
                          • Public and taxi transport |
| 3 to 6% | • IIBB local taxes |

Source: Vatlive, 2015

### TOP ONLINE PAYMENT METHODS

In percentage of total online purchases

- **Cash-based methods**: 44%
- **Visa and MasterCard**: 12%
- **Bank Transfer**: 42%
- **American Express**: 2%

Source: Adyen, 2015

**Explanation**

44% of Argentinian online purchases were made through cash-based methods.
Important holidays
• Argentinian consumers like to shop for items such as food and presents prior to Christmas (Eve), from December 24 to 26. Online shops should therefore take a shopping frenzy in the month of December into account.

Tips for online merchants
• Argentinian consumption preferences are closer to European standards than those of other Latin American countries
• Argentinian consumers pay attention to home delivery and after-sales service. They prefer to repair their old goods rather than to buy new ones
• Following the crisis in 2001-2002, Argentinians have reoriented their purchases towards sub-brands and special offers in order to save money. However, in certain geographical areas, more well-off consumers tend to accept higher prices.
• In general, Argentinians are not very loyal to brands.

Source: Santander, 2015

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Growing number of e-shoppers</td>
<td>• High inflation rate</td>
</tr>
<tr>
<td>• eGDP share has more than tripled since 2009</td>
<td>• Ranked low in the Ease of Doing Business Index</td>
</tr>
</tbody>
</table>
Country Report Brazil 2015

Brazil 2014 Key data at a glance

E-commerce GDP
0.89%
Total GDP $2,346.1bn

Brazilian Trustmark:

Brazilian national E-commerce association:

Latin America $37.4 bn +18.2%
North America $552.9 bn +12.2%
Europe $562.0 bn +13.6%
MENA $21.0 bn +21.5%
Asia-Pacific $770.0 bn +44.3%
Brazil $21.0 bn +12.9%
Total B2C Ecommerce 2014 of goods & services

202.0 million
people live in Brazil

88.7 million*
people use the Internet

32.0 million*
people are e-shoppers
*excluding people aged 0-14

Average spending per e-shopper
$655

Ranking covered Countries in turnover (USD million)
1  Brazil  $20,970
2  Argentina  $4,450
3  Chile  $2,000

Position Brazil in Global eGDP ranking
1  United Kingdom  5.74%
2  China  5.19%
3  Japan  2.94%

Estimated share of online retail of goods in total retail of goods
2.6%

Forecast 2015
$23.5bn
Turnover E-commerce Goods & Services

40% Services
60% Goods

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globalcollect
payments, knowledge, growth
ingenico

A S E N D I A
on payments & retail tech

Brasilia

21%
58%
100%
AGE STRUCTURE
Population by age category, 2014

- 0-14: 23.8%
- 15-24: 16.5%
- 25-54: 43.7%
- 55-64: 8.4%
- 65+: 7.6%

Total population: 202,033,000
Median age:
Male: 30.7 years
Female: 29.9 years

Population growth: 0.83%

Sources: Worldbank and Wikipedia, 2015

Demographic Indicators
Country Report Brazil

Area: 8,515,800 km²
Capital: Brasilia
Currency: Brazilian real (BRL)

Institution: Federal Republic
Internet access: 58%
Official language: Portuguese
URL country code: .br
Dialing Code: +55

Credits:
Ecommerce FOUNDATION

Brazil’s unemployment rate is decreasing rather strongly

Country Report Brazil

**UNEMPLOYMENT RATE**
Percentage of the total labor force, 2010-2014

- 2010: 6.7%
- 2011: 6.0%
- 2012: 5.5%
- 2013: 5.4%
- 2014: 4.8%

Source: Eurostat and IMF World Economic Outlook, 2015

**INFLATION RATE**
Annual change on Consumer Price Index (CPI), 2010-2014

- 2010: 5.0%
- 2011: 6.6%
- 2012: 5.4%
- 2013: 6.2%
- 2014: 6.3%

Source: Eurostat and IMF World Economic Outlook, 2015

**CONSUMER CONFIDENCE INDEX**
CCI on a three-month basis, 2014-2015

- Jan-14: 14.0
- Apr-14: 9.0
- Jul-14: 10.0
- Oct-14: 12.0
- Jan-15: 4.0
- Apr-15: -1.0
- Jul-15: -2.0

Source: Tradingeconomics, 2015
Brazilian consumers are optimistic about their economy

**ECONOMIC BENCHMARK**
A comparison of Brazilian economic indicators with the Latin American and Global ones, 2014

- **CCI**: -5.7
- **Inflation rate**: Brazil 6.3%, Global 4.0%, Latin America 9.8%
- **Unemployment rate**: Brazil 4.8%, Global 6.6%, Latin America 6.0%

Source: Eurostat, IMF World Economic Outlook and Tradingeconomics, 2015
Groceries were not very popular online in Brazil last year.

**ONLINE B2C SALES PER SERVICE/PRODUCT GROUP**

The percentage of online B2C sales in each service/product group, 2014

<table>
<thead>
<tr>
<th>Service/Product Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Groceries</td>
<td>3%</td>
</tr>
<tr>
<td>Mobile Phones</td>
<td>20%</td>
</tr>
<tr>
<td>TV Sets</td>
<td>20%</td>
</tr>
<tr>
<td>Home Appliances</td>
<td>20%</td>
</tr>
<tr>
<td>Clothing &amp; Footwear</td>
<td>28%</td>
</tr>
<tr>
<td>Laptop/Tablet</td>
<td>39%</td>
</tr>
<tr>
<td>Travel: Hotel Stays</td>
<td>47%</td>
</tr>
<tr>
<td>Music</td>
<td>55%</td>
</tr>
<tr>
<td>Travel: Leisure Flights</td>
<td>70%</td>
</tr>
</tbody>
</table>

Source: Google Barometer, 2015

Explanation:
Of all purchases in the clothing & footwear category, 28% were made online in Brazil in 2014.
Assuming delivery takes longer is the main reason to not buy abroad

Country Report Brazil

REASONS FOR NOT BUYING ABROAD
Reasons why Brazilian e-shoppers are hesitant to buy cross-border

- Sites in my country meet my needs: 17%
- Not trusting foreign sites: 18%
- Never occurred: 23%
- Assuming returning is difficult/costly: 24%
- Assuming delivery takes longer: 32%

Source: Google Barometer, 2015

MOST POPULAR PURCHASES FROM FOREIGN COUNTRIES
Most popular products for cross-border shopping, 2015

- Clothing and Footwear: 36%
- Cosmetics: 19%
- Books, CDs, DVDs or Video Games: 19%
- Computer Hardware: 15%
- Toys: 15%
- Household goods: 15%

Explanation
36% of Brazilian e-shoppers have bought clothing & footwear in a foreign online shop at least once.

MOTIVATIONS FOR BUYING ABROAD
Reasons why Brazilian e-shoppers buy cross-border

- Trustworthiness: 10%
- Better availability: 17%
- Recommendations from others: 19%
- Better quality: 19%
- Broader range of products: 29%
- Better conditions: 31%
- Appealing offer: 46%

Source: Google Barometer, 2015

Most popular products for cross-border shopping, 2015

- Clothing and Footwear
- Cosmetics
- Books, CDs, DVDs or Video Games
- Computer Hardware
- Toys
- Household goods

Source: Google Barometer, 2015
Country Report Chile 2015

Chile

2014 Key data at a glance

**E-commerce GDP**
0.78%
Total GDP $258.1bn

**Chilean Trustmark:**

**Chilean national E-commerce association:**

**Position Chile in Global eGDP ranking**
1. **United Kingdom** 5.74%
2. **China** 5.19%
3. **Japan** 2.94%
19. **Argentina** 0.82%
20. **Italy** 0.82%
21. **Chile** 0.78%
22. **Qatar** 0.59%
23. **Kuwait** 0.58%

**Average spending per e-shopper**
$377

**Forecast 2015**
$2.4bn
Turnover E-commerce Goods & Services

**Ranking covered Countries in turnover (USD million)**
1. **Brazil** $20,970
2. **Argentina** $4,450
3. **Chile** $2,000

**Latin America** $37.4 bn +18.2%
**North America** $552.9 bn +12.2%
**Europe** $562.0 bn +13.6%
**MENA** $21.0 bn +21.5%
**Asia-Pacific** $770.0 bn +44.3%
Chile $2.0 bn +25.0%

Total B2C E-commerce 2014 of goods & services

**5.3 million*** e-shoppers
*excluding people aged 0-14

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**Estimated 61% of the online population is on social media**
Demographic Indicators
Country Report Chile

Total population: 17,773,000
Median age:
Male: 33.3 years
Female: 34.6 years

Population growth: 0.87%

Area: 756,096 km²
Capital: Santiago
Currency: Chilean Peso (CLP)

Institution: Republic
Internet access: 72%
Official language: Spanish
Widely spoken foreign language(s): English
URL country code: .cl
Dialing Code: +56

Age Structure
Population by age category, 2014

- 0-14: 20.7%
- 15-24: 16.3%
- 25-54: 43.4%
- 55-64: 9.9%
- 65+: 9.7%


Sources: Worldbank and Wikipedia, 2015
34.8% of Chile’s online population does not yet shop online

Country Report Chile


*Excluding people aged 0-14
Android has a market share of nearly 75% in mobile operating systems.
Every country has its own social habits and rules. Therefore, when doing business in a foreign country, you should be aware of the DOs and DON' Ts of that particular nation.

Below, you will find some general tips and tricks that might help you when expanding to Chile.

• In Chile, people leave little space between each other when interacting. Do not be surprised if the person you are speaking with places a hand on your shoulder when talking with you. Try not to step away or appear uncomfortable
• Eye contact is important in Chile as it conveys trust, sincerity and interest
• Business entertainment usually takes place at hotels or restaurants. If you are the one inviting other, you should pick up the check
• If you are invited to a person's home in Chile, it is good etiquette to send flowers or chocolates to the hostess in advance. If you wish to convey your thanks after the meal, do so by phone rather than in writing
• Appointments should be made a few weeks prior to arrival in Chile
• Honor plays a vital role in Chilean society. Never criticize people in public or cause embarrassment to anyone. Stick to your word because otherwise you will be seen as untrustworthy
• The business atmosphere in Chile is more formal than in the rest of South America
• Do not make comparisons between the United States and Chile
• Do not talk about politics or human rights, especially as a foreigner, unless your host initiates the discussion
• It is common that Chilean business people do not answer emails, faxes, letters or phone calls promptly. Acknowledging messages is not a common habit and many business people might not respond until there is an opportunity or something definite to answer.
• Coupon sites are very popular in Chile and 62% of Chilean Internet users are registered on a coupon site.
• 88% of Chilean e-commerce shoppers go online to compare prices before buying.
1. Customers at the center
The number of e-shoppers keeps on growing and is relatively young. They are ready to embrace new digital technologies and devices. As a result, their influence on the sales process increases.

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

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

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

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

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

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

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

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

Main barriers regarding e-commerce:
• lack of infrastructure;
• high costs or limitation of usage;
• lack of trust (perceived unsecure payment, privacy issues, return options, etc.);
• trade restrictions (tariffs, trade agreements, high import duties, etc.);
• different legal systems and requirements;
• language barriers;
• political instability, especially in emerging and developing regions of the world.
Ecommerce Foundation
The Ecommerce Foundation is an independent non-profit organization, founded by Ecommerce Europe and working in partnership with national e-commerce associations worldwide. In addition, the Ecommerce Foundation cooperates with online and omnichannel selling companies from industries such as retail, travel & finance. Its mission is to facilitate the development of practical knowledge, insights and learnings for which individual institutions, associations and B2C selling companies do not have the (financial) resources and/or capabilities.

By combining collective goals and efforts, the Ecommerce Foundation is able to realize research, reports, benchmarks and studies that could not have been possible on an individual basis.
40+ National Ecommerce Reports supporting members going cross border.

Every year, 10-12 Round Tables sessions are organized by our national associations to foster C-level knowledge exchange.

The Global E-commerce Summit & awards offer companies insights into best practices across the globe.

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

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

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

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

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

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

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

**Personalized report**

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

**Light reports**

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

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### Information about the Reports

#### About Ecommerce Foundation

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### EUROPEAN REGIONAL REPORTS

<table>
<thead>
<tr>
<th>Region</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western European Report</td>
<td>€790*</td>
</tr>
<tr>
<td>Belgium, France, Ireland, Netherlands and United Kingdom</td>
<td></td>
</tr>
<tr>
<td>Central European Report</td>
<td>€790*</td>
</tr>
<tr>
<td>Austria, Czech Republic, Germany, Hungary, Poland and Switzerland</td>
<td></td>
</tr>
<tr>
<td>Southern European Report</td>
<td>€790*</td>
</tr>
<tr>
<td>Greece, Italy, Portugal, Spain and Turkey</td>
<td></td>
</tr>
<tr>
<td>Northern European Report</td>
<td>€790*</td>
</tr>
<tr>
<td>Denmark, Finland, Iceland, Norway and Sweden</td>
<td></td>
</tr>
<tr>
<td>Eastern European Report</td>
<td>€790*</td>
</tr>
<tr>
<td>Romania, Russia and Ukraine</td>
<td></td>
</tr>
<tr>
<td>European B2C E-commerce Report 2015</td>
<td>€1,290*</td>
</tr>
<tr>
<td>All European reports (5 regional reports + European Report)</td>
<td>€2,950*</td>
</tr>
</tbody>
</table>

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

#### REGIONAL/CONTINENTAL REPORTS

<table>
<thead>
<tr>
<th>Region</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>€790</td>
</tr>
<tr>
<td>USA, Mexico and Canada</td>
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</tr>
<tr>
<td>Latin America</td>
<td>€790</td>
</tr>
<tr>
<td>Brazil, Argentina and Chile</td>
<td></td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td>€790</td>
</tr>
<tr>
<td>Japan, China, India, Australia, Indonesia, Vietnam and South Korea</td>
<td></td>
</tr>
<tr>
<td>Global B2C E-commerce Report 2015</td>
<td>€1,290</td>
</tr>
<tr>
<td>All-In-One E-commerce Report Package</td>
<td>€4,950</td>
</tr>
<tr>
<td>(European and Global Report + 5 European Regional Reports + 5 Regional/Continental Reports)</td>
<td></td>
</tr>
</tbody>
</table>
**GOMSEC**

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

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

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

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

**Definition of B2C e-commerce sales**

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

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

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

**Classification of B2C e-commerce**

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

Online purchases of the following items are excluded from GOMSEC:

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

B2C e-commerce therefore includes all online transactions between businesses and consumers using desktop computers, laptops, tablets, smartphones, point-of-sales and smart-wearables, for instance through online shops, physical stores (“online instore”), email, QR codes, catalogue, etc. B2C e-commerce includes Value Added Tax (VAT) or other sales tax, delivery costs and Apps, but excludes returns.
<table>
<thead>
<tr>
<th>Event Tickets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tickets for concerts and festivals</td>
</tr>
<tr>
<td>Tickets for (movie) theaters</td>
</tr>
<tr>
<td>Tickets for zoos and amusement parks</td>
</tr>
<tr>
<td>Tickets for museums</td>
</tr>
<tr>
<td>Tickets for sports games</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fashion</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clothing</strong></td>
</tr>
<tr>
<td>Underwear &amp; Upperwear</td>
</tr>
<tr>
<td>Children's wear</td>
</tr>
<tr>
<td>Swimwear &amp; Sportswear</td>
</tr>
<tr>
<td>Nightwear &amp; legwear</td>
</tr>
<tr>
<td><strong>Shoes &amp; Personal lifestyle</strong></td>
</tr>
<tr>
<td>Shoes</td>
</tr>
<tr>
<td>Jewelry, Bijoux, Watches &amp; others fashion accessories (e.g. sunglasses)</td>
</tr>
<tr>
<td>Bags, wallets, suitcases</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sports &amp; Recreation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports hardware (e.g. soccer shoes, tennis rackets)</td>
</tr>
<tr>
<td>Bicycles &amp; accessories</td>
</tr>
<tr>
<td>Articles for camping and recreation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Toys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indoor and outdoor toys</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Food/Nearfood/Health</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food/Nearfood</strong></td>
</tr>
<tr>
<td>Food &amp; Beverages</td>
</tr>
<tr>
<td>Fresh produce</td>
</tr>
<tr>
<td>Packaged consumer goods</td>
</tr>
<tr>
<td>Detergents/household cleaning</td>
</tr>
<tr>
<td>Animal feed</td>
</tr>
<tr>
<td>Tobacco</td>
</tr>
<tr>
<td><strong>Health &amp; Beauty</strong></td>
</tr>
<tr>
<td>Personal care &amp; Hygiene</td>
</tr>
<tr>
<td>Baby care</td>
</tr>
<tr>
<td>Perfume</td>
</tr>
<tr>
<td>OTC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Electronics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Consumer Electronics</strong></td>
</tr>
<tr>
<td>Photo equipment</td>
</tr>
<tr>
<td>Audio equipment</td>
</tr>
<tr>
<td>TV/video equipment</td>
</tr>
<tr>
<td>Car electronics (navigation, audio, etc.)</td>
</tr>
<tr>
<td><strong>Information Technology (IT)</strong></td>
</tr>
<tr>
<td>IT hardware (PCs, laptops, tablets, etc.)</td>
</tr>
<tr>
<td>Computer Software</td>
</tr>
<tr>
<td><strong>Household Electronics</strong></td>
</tr>
<tr>
<td>MDA: air-conditioning, dishwashers, wash machines and other white goods</td>
</tr>
<tr>
<td>SDA: equipment for personal care, home comfort, kitchen appliances</td>
</tr>
</tbody>
</table>
### Global Online Measurement Standard for B2C E-commerce (GOMSEC)

#### About Ecommerce Foundation

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<th>Travel</th>
<th>Flight Tickets &amp; Accommodations</th>
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<td><strong>New indemnity, Life and Health Insurances</strong></td>
<td><strong>Package Travel</strong></td>
<td><strong>Private transport if booked through a tour operator</strong></td>
</tr>
<tr>
<td>Liability insurance</td>
<td>Health Insurance – Base</td>
<td>Flight Tickets</td>
</tr>
<tr>
<td>(insurance for receiving a payment in addition to a survivor’s allowance)</td>
<td>Health insurance – additional</td>
<td>Hotel stays</td>
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<tr>
<td>Bike/caravan/motorbike/ Scooter insurance</td>
<td>ANW-gap insurance</td>
<td>Apartment/bungalow/camping site</td>
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<tr>
<td>Accident insurance</td>
<td>Annuity insurance</td>
<td>-&gt; all of the above not booked in combination with other travel-parts</td>
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<tr>
<td>Boat insurance</td>
<td>Disability insurance – entrepreneurs</td>
<td></td>
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<tr>
<td>Legal assistance insurance</td>
<td>Life insurance</td>
<td></td>
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<tr>
<td>Home insurance</td>
<td>Disability insurance – private</td>
<td></td>
</tr>
<tr>
<td>Travel insurance</td>
<td>Endowment insurance</td>
<td></td>
</tr>
<tr>
<td>(continuous/annual + short term)</td>
<td>based on savings</td>
<td></td>
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<tr>
<td>Insurance package</td>
<td>Mortgage-related disability insurance</td>
<td></td>
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</table>

#### Telecom

<table>
<thead>
<tr>
<th>Smartphones, mobile phones &amp; mobile devices</th>
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</thead>
<tbody>
<tr>
<td>Telefax and answering machines</td>
</tr>
<tr>
<td>Headsets &amp; Accessories (mobile) phones</td>
</tr>
<tr>
<td>Prepaid cards and tariffs of new phone subscriptions</td>
</tr>
</tbody>
</table>

#### 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)

#### Others

<table>
<thead>
<tr>
<th>Services</th>
<th>Goods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dating based on new subscriptions</td>
<td>Cars and parts</td>
</tr>
<tr>
<td>Other Services</td>
<td>Products for animals</td>
</tr>
<tr>
<td></td>
<td>Flowers &amp; plants</td>
</tr>
<tr>
<td></td>
<td>Optician (excl. sunglasses, hearing aids)</td>
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<tr>
<td></td>
<td>Adult</td>
</tr>
</tbody>
</table>
Definitions related to the Internet, E-commerce and Online Retailing

About Ecommerce Foundation

- **Broadband access**: the availability of broadband is measured by the percentage of households that are connectable to an exchange that has been converted to support DSL technology, to a cable network upgraded for Internet traffic, or to other broadband technologies. It includes fixed and mobile connections (source: Eurostat)

- **Cross-border e-commerce**: percentage of e-commerce purchased at foreign sites

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

- **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 and Online Retailing

<table>
<thead>
<tr>
<th><strong>Market place</strong></th>
<th>online platform on which companies (and consumers) sell goods and/or services.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Logistics Performance Index (LPI)</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Mobile commerce (or m-commerce)</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Mobile subscriptions</strong></td>
<td>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).</td>
</tr>
<tr>
<td><strong>Networked Readiness Index (NRI)</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Online buyer (or e-shopper, E-buyer)</strong></td>
<td>an individual who regularly bought or ordered goods or services through the Internet.</td>
</tr>
<tr>
<td><strong>Online expenditure</strong></td>
<td>spending per user who purchased goods or services online.</td>
</tr>
<tr>
<td><strong>Online Retail (or e-retail, electronic retail or retailing or even e-tailing)</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Penetration levels</strong></td>
<td>the percentage of a population using the Internet, mobile phones, smartphones or tablet devices.</td>
</tr>
<tr>
<td><strong>Real economic growth rate</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Retail sales</strong></td>
<td>the selling of mainly goods from businesses to individuals from a traditional or so-called bricks-and-mortar shop.</td>
</tr>
<tr>
<td><strong>Statcounter research method</strong></td>
<td>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.</td>
</tr>
</tbody>
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**About Ecommerce Foundation**

Ecommerce Foundation

www.ecommercefoundation.org
Methodology, Acknowledgements and Sources

About Ecommerce Foundation

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

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

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

<table>
<thead>
<tr>
<th>The sources consulted include:</th>
<th>Corporate sources</th>
<th>Other sources</th>
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<tbody>
<tr>
<td><strong>(Inter)national Associations</strong></td>
<td>• A.T. Kearney</td>
<td>• Digital Hub Development Agency (DHDA)</td>
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<tr>
<td>• ACEPI (Portugal)</td>
<td>• Deloitte</td>
<td>• European Commission</td>
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<tr>
<td>• Adigital (Spain)</td>
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<td>• Eurostat</td>
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<tr>
<td>• Apec (Czech Republic)</td>
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<td>• European Central Bank (ECB)</td>
</tr>
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<td>• GfK</td>
<td>• European Banking Association (EBA Clearing)</td>
</tr>
<tr>
<td>• Ecommerce Europe</td>
<td>• Google</td>
<td>• International Monetary Fund (IMF)</td>
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<td>• Hybris</td>
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<tr>
<td>• eCom Luxembourg (Luxembourg)</td>
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<tr>
<td>• E-Commerce Polska (Poland)</td>
<td>• KPMG</td>
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<td>• FDIH (Denmark)</td>
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<td>• FEVAD (France)</td>
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<td>• KAUPPA (Finland)</td>
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<td>• Wearesocial.net</td>
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<td>• I-Research</td>
<td>• Netwise.jp</td>
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<tr>
<td>• Netcomm (Italy)</td>
<td>• TWS Global</td>
<td>• Statcounter</td>
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<td>• Netcomm Suisse (Switzerland)</td>
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<td>• NORA (Australia)</td>
<td>• EWDN</td>
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<tr>
<td>• Retail Excellence (Ireland)</td>
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<tr>
<td>• Shop.org (USA)</td>
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<td>• S2EK.org (Hungary)</td>
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<td>• Thuiswinkel.org (Netherlands)</td>
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<td>• Virke (Norway)</td>
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<tr>
<th>Publications</th>
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<td>• Dibspayment.com</td>
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<td>• E-commercefacts.com</td>
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<td>• Euromonitor.com</td>
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<td>• Statista</td>
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<td>• Adyen</td>
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About Ecommerce Foundation

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