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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.

We are PostNL. For our clients, we are the link between the physical and the online world. We facilitate communications between people and companies. On average, we deliver 550,000 parcels and 10 million letters a day throughout all of the Netherlands. We offer more and more new services through combinations of smart networks, digital applications and the right communications channels. In doing so, we aim to make the daily lives of our customers easier. As the first listed postal company, we have the largest and most modern network for letters, parcels and e-commerce in the Benelux countries. In addition, we also operate in Germany and Italy.
Our Report Partners

This report is created with help from the following partners

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.

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. 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.

Webhelp is a global business process outsourcer (BPO), specialising in customer experience and payment management in addition to sales and marketing services across voice, social and digital channels. From 21 countries with a 30,000-strong team, our focus is on engineering performance improvements and delivering a real and lasting transformation in our clients’ operating models to generate financial advantage. We partner with some of the world’s most progressive brands.
Thuiswinkel.org

Online retail continues to grow significantly. The European e-commerce turnover managed to increase by 16.1% to € 16.1bn in 2015. Compared to the 2.2% growth of general retail in Europe, we can safely state that online trading is here to stay.

These figures, and many more, are included in this “The Netherlands B2C E-commerce Report 2016” by the Ecommerce Foundation. This non-profit organization is commissioned by Ecommerce Europe, and the Netherlands is one of the more than 20 countries participating in it. We are very proud to be a partner of this project, as it provides our members, stakeholders and institutions with a clear overview of the Dutch e-commerce market.

We would like to thank the Ecommerce Foundation for creating this report. Because of their meticulous research, we now have a strong basis for our activities. With the B2C E-commerce Reports being only one of their instruments, the Ecommerce Foundation strives to strengthen the e-commerce community in several ways, and Thuiswinkel.org will continue to support them in doing so.

If you would like to receive additional information and/or purchase or download other reports, we kindly refer you to www.ecommerce-europe.eu. Naturally, all our members will receive the full versions of all B2C e-commerce reports published by the Ecommerce Foundation for free. For more information about this, please contact us through our website www.thuiswinkel.org or send us an email at info@thuiswinkel.org.

Ecommerce Foundation

At the Ecommerce Foundation, we believe that sharing knowledge is essential for the continuous growth of the e-commerce industry. For this reason we have recently developed two initiatives with the aim of helping e-commerce companies improve. The EcommerceWiki is an international platform on which we strive to gather as much relevant e-commerce content as possible, with the help of many experts worldwide. In addition, we have set up the Ecommerce Benchmark, a useful tool for companies to compare their e-commerce performance with their direct competitors in a safe and anonymous way.

Through this report we want to share our knowledge on Dutch B2C e-commerce. We have gathered these facts, figures and insights through thorough desk research and with the help of various partners. This results in an elaborate report which will definitely offer valuable information to parties that trade cross-border in the Netherlands or have intentions to do so.

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 Asendia, Ingenico, Webhelp and PostNL, who have enabled us to make our reports widely available, and to Thuiswinkel.org and GfK for their close cooperation and involvement.

For any additional information about the Ecommerce Foundation and its products, please contact us through our website www.ecommercefoundation.org or send us an email at info@ecommercefoundation.org.

Secretary-General of Ecommerce Europe
Marlene ten Ham

CEO of Thuiswinkel.org
Wijnand Jongen

Director of Ecommerce Foundation
Jorij Abraham

Researcher E-commerce
Roald Willemsen
The Netherlands 2015 Key E-commerce Facts at a Glance

13.9mn people are over the age of 15

13.6mn people use the Internet (98%)

12.9mn people shop online (93%)

Total GDP of €677.8bn

E-commerce GDP of 2.37%

76% of the population uses a smartphone

Share of mobile in online sales

B2C e-commerce turnover and average spending per e-shopper

€1,150
€1,090
€1,242


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Dutch report in cooperation with: Dutch national e-commerce association www.thuiswinkel.org

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Country report sponsored by:

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Demographic Indicators
Country Report The Netherlands

AGE STRUCTURE
Population by age category, 2015

- 0-14: 16.7%
- 15-24: 12.2%
- 25-54: 40.1%
- 55-64: 13.0%
- 65+: 18.0%

Total population: 16,900,000
Median age:
- Male: 42.3 years
- Female: 43.2 years

Population growth: 0.42%

Institution: Constitutional Monarchy
Broadband access: 94%
Internet access: 98%
URL country code: .nl
Official language: Dutch
Secondary Languages: Frisian
Widely spoken foreign language(s): English, French, German

Area: 41,526 km²
Capital: Amsterdam
Currency: EURO (EUR)

Sources: Eurostat and World Factbook, 2016
After some down years, Dutch GDP is growing again

Country Report The Netherlands

TOTAL GROSS DOMESTIC PRODUCT
GDP at market prices, 2011 - 2015

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP (in millions of euros)</th>
<th>GDP per capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>€677,779</td>
<td>€40,000</td>
</tr>
<tr>
<td>2014</td>
<td>€662,770</td>
<td>€39,300</td>
</tr>
<tr>
<td>2013</td>
<td>€650,857</td>
<td>€38,700</td>
</tr>
<tr>
<td>2012</td>
<td>€645,164</td>
<td>€38,500</td>
</tr>
<tr>
<td>2011</td>
<td>€642,929</td>
<td>€38,500</td>
</tr>
</tbody>
</table>

Source: Eurostat, 2016

E-commerce share of GDP 2.37%

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

Explanation
The Dutch GDP grew by 1.6% in 2015. This real growth rate takes the inflation rate into account.

Source: Eurostat, 2016
The Dutch inflation rate continued to drop last year

Country Report The Netherlands

**UNEMPLOYMENT RATE**
Percentage of the total labor force, 2011-2015

<table>
<thead>
<tr>
<th>Year</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>5.0%</td>
</tr>
<tr>
<td>2012</td>
<td>5.8%</td>
</tr>
<tr>
<td>2013</td>
<td>7.3%</td>
</tr>
<tr>
<td>2014</td>
<td>7.4%</td>
</tr>
<tr>
<td>2015</td>
<td>6.9%</td>
</tr>
</tbody>
</table>

**INFLATION RATE**
Annual change on Consumer Price Index (CPI), 2011-2015

<table>
<thead>
<tr>
<th>Year</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>2.3%</td>
</tr>
<tr>
<td>2012</td>
<td>2.5%</td>
</tr>
<tr>
<td>2013</td>
<td>2.5%</td>
</tr>
<tr>
<td>2014</td>
<td>1.0%</td>
</tr>
<tr>
<td>2015</td>
<td>0.6%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>-7.0</td>
<td>-3.0</td>
<td>-8.0</td>
<td>-3.0</td>
<td>-6.0</td>
<td>4.0</td>
<td>8.0</td>
<td></td>
</tr>
</tbody>
</table>

Source: Eurostat, 2015

Source: Statistics Netherlands, 2016
The Dutch consumer is quite optimistic

Country Report The Netherlands

ECONOMIC BENCHMARK
A comparison of Dutch economic indicators with the Western European and European ones, 2015
*excluding the inflation rates of Russia, Ukraine, FYR Macedonia, Montenegro, Serbia, Albania, Bosnia and Herzegovina and Moldova

Source: Eurostat, IMF World Economic Outlook and Tradingeconomics, 2016
The Netherlands ranks second on the LPI, behind Germany

Country Report The Netherlands

**Logistical Performance Index**
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.

**Ease of Doing Business Index**
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.

**E-government Index**
The UN’s E-Government Index provides a comparative assessment of the e-government development of UN Member States. Important factors contributing to a high level of e-government development are concurrent past and present investments in telecommunication, human capital and provision of online services.
1. What are the latest logistical developments in the Netherlands?
“The Dutch market is very attractive for international companies looking to set up a European e-commerce hub. They are well-connected thanks to Amsterdam’s Schiphol Airport, several major sea ports and the country’s strong road infrastructure. This is helpful because consumers expect and demand greater choice when it comes to shipping and delivery options.”

2. What are the latest e-commerce developments in the Netherlands?
“Technology has given consumers unprecedented access to better products and prices globally. More than half of the population in the Netherlands uses Facebook, so it’s clear that retailers need to have social commerce front of mind when targeting customers.”

3. In what area should logistics & e-commerce in the Netherlands improve in the short and the long term?
“The majority of consumers in the Netherlands opt for home delivery, so reliable delivery in city centers is crucial. Parcel lockers are also a growing trend in logistics and have already gained some traction in the Netherlands. They have the potential to take a larger share of the market as the number of pick-up points is growing consistently.”

4. Do you have any tips for (online) merchants in terms of delivery and returns?
“More and more consumers expect free shipping offers when they shop online and will actively seek out sites that offer them added incentives over competitors. The same also goes for free returns; shoppers will be encouraged to purchase from you and keep returning if they are given reassurance that they won’t be stuck with an unwanted product.”

“Dutch consumers are well versed in foreign languages, particularly English, which helps boost international sales”

Berry de Vaal
Sales Manager Benelux at Asendia
The number of e-shoppers is growing steadily

Country Report The Netherlands

Source: Statistics Netherlands, Eurostat, Thuiswinkel Markt Monitor and Ecommerce Foundation, 2016
B2C e-commerce sales are expected to reach €18.0bn in 2016

Country Report The Netherlands

B2C E-COMMERCE
Total online sales of goods and services, in millions of euros, 2012-2016 (f)

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>11,869</td>
</tr>
<tr>
<td>2013</td>
<td>12,877</td>
</tr>
<tr>
<td>2014</td>
<td>13,840</td>
</tr>
<tr>
<td>2015</td>
<td>16,070</td>
</tr>
<tr>
<td>2016 (f)</td>
<td>18,014</td>
</tr>
</tbody>
</table>

B2C E-COMMERCE GROWTH RATE
Percentage change in B2C e-commerce turnover, 2012-2016 (f)

<table>
<thead>
<tr>
<th>Year</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>9.4%</td>
</tr>
<tr>
<td>2013</td>
<td>8.6%</td>
</tr>
<tr>
<td>2014</td>
<td>7.5%</td>
</tr>
<tr>
<td>2015</td>
<td>16.1%</td>
</tr>
<tr>
<td>2016 (f)</td>
<td>12.1%</td>
</tr>
</tbody>
</table>

Source: Thuiswinkel.org Markt Monitor, 2016
Remarkable growth of online spending in the Netherlands in 2015

Online spending in the Netherlands increased by 16.1% in 2015, which is remarkable as it had been less than 10% in the preceding years. The main reason for this significant growth was that the online spending on products increased by 22% compared to 2014. In comparison, the online spending on services grew by 10.3%.

Throughout the year, the growth of online sales in food/nearfood products was noteworthy. The online share of this category in value was still relatively low at 2.1%, but this represented a 40% growth compared to 2014. Another category that showed interesting results was toys: in Q4 2015, the online share of total spending on toys was already 36% (Q4 2014: 29%).
Clothing, Telecom and IT are the most popular product groups

OVERVIEW OF POPULAR PRODUCT GROUPS
Online sales of popular product groups in millions, 2014-2015

- Clothing
- Telecom
- Information Technology
- Home & Garden: €722
- Media & Entertainment
- Food/nearfood
- Household Electronics: €489
- Shoes & Lifestyle: €384
- Consumer Electronics
- Sport & Recreation
- Toys
- Health & Beauty
- Other

MARKET SHARE
Market share of the most popular product categories in 2015

For the complete overview of the product groups, please order your full report here (€95)

Source: Thuiswinkel.org Markt Monitor, 2016

Country Report The Netherlands

www.ecommercefoundation.org
The Travel segment is the most popular service group

Country Report The Netherlands

OVERVIEW OF POPULAR SERVICE GROUPS
Online sales of popular service groups in millions, 2014-2015

For the complete overview of the service groups, please order your full report here (€95)

<table>
<thead>
<tr>
<th>Service Group</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel: Flight Tickets and Hotels</td>
<td>€1,090</td>
<td>€1,242</td>
</tr>
<tr>
<td>Travel: Package Travel and Private Transport</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurances</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Tickets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Thuiswinkel.org Markt Monitor, 2016

NUMBER OF E-SHOPPERS AND AVERAGE SPENDING PER E-SHOPPER
2013-2015

<table>
<thead>
<tr>
<th>Year</th>
<th>Average Spending</th>
<th>Number of E-shoppers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>€1,150</td>
<td>11.2mn</td>
</tr>
<tr>
<td>2014</td>
<td>€1,090</td>
<td>12.7mn</td>
</tr>
<tr>
<td>2015</td>
<td>€1,242</td>
<td>12.9mn</td>
</tr>
</tbody>
</table>

Source: Thuiswinkel.org Markt Monitor, 2016

MARKET SHARE
Market share of the most popular product categories in 2015

Travel: Flight Tickets and Hotels
Travel: Package Travel and Private Transport
Insurances
Event Tickets
Others
Flight Tickets & Accommodations are mostly sold online

Country Report The Netherlands

ONLINE B2C SALES PER SERVICE/PRODUCT GROUP
The percentage of online B2C sales in each service/product group, 2015

<table>
<thead>
<tr>
<th>Service/Product Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flight Tickets &amp; Accommodations</td>
<td>85%</td>
</tr>
<tr>
<td>Event Tickets</td>
<td>73%</td>
</tr>
<tr>
<td>Package Travel</td>
<td>70%</td>
</tr>
<tr>
<td>Insurances</td>
<td>62%</td>
</tr>
<tr>
<td>Media &amp; Entertainment</td>
<td>56%</td>
</tr>
<tr>
<td>Sports</td>
<td>33%</td>
</tr>
<tr>
<td>Information Technology</td>
<td>26%</td>
</tr>
<tr>
<td>Consumer Electronics</td>
<td>24%</td>
</tr>
<tr>
<td>Household Electronics</td>
<td>23%</td>
</tr>
<tr>
<td>Toys</td>
<td>17%</td>
</tr>
<tr>
<td>Telecom</td>
<td>15%</td>
</tr>
<tr>
<td>Shoes and Lifestyle</td>
<td>15%</td>
</tr>
<tr>
<td>Fashion: Clothing</td>
<td>12%</td>
</tr>
<tr>
<td>Health &amp; Beauty</td>
<td>2%</td>
</tr>
<tr>
<td>Home &amp; Garden</td>
<td>2%</td>
</tr>
<tr>
<td>Food/Nearfood</td>
<td>1%</td>
</tr>
</tbody>
</table>

Explanation
Of all purchases in the Media & Entertainment category, 56% were made online in the Netherlands in 2015.

Sources: Thuiswinkel Markt Monitor, 2016
**Ahold was the Netherlands’ largest e-tailer in 2014**

**Country Report The Netherlands**

**TOP 7 ONLINE RETAILERS**
Top 7 of online retailers in goods and travel, based on online turnover, 2014

<table>
<thead>
<tr>
<th>#</th>
<th>Top 7 Online Retailers Goods</th>
<th>Online turnover</th>
<th>Top 7 Online Retailers Travel</th>
<th>Online turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ahold (incl. Ah.nl and Bol.com)</td>
<td>€910mn</td>
<td>KLM</td>
<td>€533mn</td>
</tr>
<tr>
<td>2</td>
<td>RFS Holland Holding (Fonq.nl, wehkamp.nl)</td>
<td>€498mn</td>
<td>TUI Netherlands</td>
<td>€449mn</td>
</tr>
<tr>
<td>3</td>
<td>Zalando</td>
<td>€417mn</td>
<td>Sundio Group</td>
<td>€380mn</td>
</tr>
<tr>
<td>4</td>
<td>Coolblue</td>
<td>€275mn</td>
<td>Transavia.com</td>
<td>€300mn</td>
</tr>
<tr>
<td>5</td>
<td>Thuisbezorgd</td>
<td>€230mn</td>
<td>Thomas Cook NL</td>
<td>€256mn</td>
</tr>
<tr>
<td>6</td>
<td>H&amp;M</td>
<td>€162mn</td>
<td>Travix</td>
<td>€222mn</td>
</tr>
<tr>
<td>7</td>
<td>KPN</td>
<td>€145mn</td>
<td>Landal Green Parks</td>
<td>€157mn</td>
</tr>
<tr>
<td>8</td>
<td>Ticketmaster</td>
<td>€144mn</td>
<td>Roompot Vakanties</td>
<td>€154mn</td>
</tr>
<tr>
<td>9</td>
<td>Hema</td>
<td>€135mn</td>
<td>Otravo</td>
<td>€152mn</td>
</tr>
<tr>
<td>10</td>
<td>Otto</td>
<td>€119mn</td>
<td>Tix.nl</td>
<td>€151mn</td>
</tr>
</tbody>
</table>

Source: Twinkle top 100, September 2015

**SHARE OF E-RETAILERS GOODS**
Share of online retailers in goods in total online turnover of goods, 2014

- Ahold: 62.4%
- RFS: 7.1%
- Zalando: 5.9%
- Coolblue: 5.9%
- Thuisbezorgd: 3.9%
- H&M: 3.3%
- KPN: 2.3%
- Others: 2.1%

**SHARE OF E-RETAILERS TRAVEL**
Share of online retailers in travel in total online turnover of services, 2014

- KLM: 66.9%
- TUI Netherlands: 7.7%
- Sundio Group: 6.5%
- Transavia.com: 5.5%
- Thomas Cook NL: 4.3%
- Travix: 3.7%
- Landal Green Parks: 3.2%
- Others: 2.3%

Source: Twinkle top 100 and Ecommerce Foundation, 2015
An omni-channel approach is insuperable

Whether their business is online, in physical stores or both, all retailers face similar challenges. They have to deliver a seamless customer experience at every touchpoint, maximize sales across every channel and device, and live up to their promises regarding product availability and delivery. In order to create a strong retail brand to which consumers will return, they must turn shopping into retail therapy – effortless, relaxing and ultimately enjoyable.

Customer experiences should not happen by accident, but must be engineered. This means that one should really understand his customer’s journey and its moments of truth, and base his next best actions on smart and predictive data analytics. An omni-channel approach to service and sales is powering the retailers’ ability to win hearts, minds and revenue share.

Gert-Jan Morsink  
CEO of Webhelp the Netherlands
Smartphone usage is growing steadily in the Netherlands

**Country Report The Netherlands**

**MOBILE SALES**
Sales through smartphones and tablets, 2015

- **Smartphone; €439mn**
- **Tablet; €1,855mn**

**Totale mobile sales of €2,294mn**

**OVERVIEW OF SMARTPHONE USAGE**
Percentage of population of 15 years and older that uses a smartphone, 2012-2015

- **2012:** 43%
- **2013:** 52%
- **2014:** 65%
- **2015:** 76%

Source: Thuiswinkel Markt Monitor, 2016

Source: Google Barometer, 2016

**Totale mobile sales of €2,294mn**
23% of Dutch consumers bought something at a foreign site

Country Report The Netherlands

€513mn
Total amount spent on cross-border purchases in the Netherlands in 2015

CROSS-BORDER E-COMMERCE
Percentage of Dutch population that made at least one cross-border purchase, 2011-2015

- 14.0% in 2011
- 14.0% in 2012
- 16.0% in 2013
- 20.0% in 2014
- 23.0% in 2015

The Netherlands had 3.2 million cross-border buyers in 2015

MOST POPULAR DESTINATIONS
Most popular destinations for Dutch cross-border e-shoppers, 2015

- China €118mn
- Germany €82mn
- USA €62mn
- UK €77mn
- Spain €26mn
- France €15mn
- Belgium €31mn
- Nordic countries €15mn
- Italy €5mn
- Others €82mn

Total amount spent on cross-border purchases in the Netherlands in 2015: €513mn

The Netherlands had 3.2 million cross-border buyers in 2015

Source: Thuiswinkel Markt Monitor, 2016
Cross-border sales increased by more than 30% in 2015

23% of the Dutch bought at least one item at a non-Dutch website last year. In total, there were 3.2 million Dutch cross-border buyers in 2015, and the total value of cross-border online purchases grew by 31% to €513 million. The most popular country for Dutch consumers to buy from was China last year, as 23% of the total value of cross-border purchases came from Chinese websites. Germany (16%) and UK (15%) ranked second and third in this regard.

Gino Thuij
Industry Lead Fashion & Lifestyle at GfK
iDEAL is the most popular payment method

Country Report The Netherlands

TOP ONLINE PAYMENT METHODS
In percentage of online purchases, 2015

1. iDEAL (56%)
2. Credit Cards (12%)
3. Payment Authorization/Bank Transfer (5%)
4. Debit Card (3%)
5. Giro (4%)
6. PayPal (3%)
7. Bank Transfer (3%)
8. Coupons (2%)
9. Others (4%)

Source: E-commerce Payment monitor, 2016

TOP 3 PAYMENTS THROUGH A MOBILE DEVICE
1. iDEAL (46%)
2. Credit Card (19%)
3. Payment Authorization/Bank Transfer (5%)

Source: E-commerce Payment monitor, 2016

AVERAGE AMOUNT PER ONLINE PURCHASE
Jan-Jun 2015

<table>
<thead>
<tr>
<th>Payment method</th>
<th>Average amount per online purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Authorization</td>
<td>€241 (-7%)</td>
</tr>
<tr>
<td>Bank Transfer</td>
<td>€222 (-16%)</td>
</tr>
<tr>
<td>Credit Cards</td>
<td>€138 (+2%)</td>
</tr>
<tr>
<td>Debit Card</td>
<td>€115 (+2%)</td>
</tr>
<tr>
<td>iDEAL</td>
<td>€107 (+2%)</td>
</tr>
<tr>
<td>Giro</td>
<td>€78 (+12%)</td>
</tr>
<tr>
<td>AfterPay</td>
<td>€76 (-11%)</td>
</tr>
<tr>
<td>PayPal</td>
<td>€60 (+16%)</td>
</tr>
</tbody>
</table>

Source: E-commerce Payment monitor, 2016

VAT overview
the Netherlands

<table>
<thead>
<tr>
<th>Threshold for registration</th>
<th>€100,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard VAT rate</td>
<td>21%</td>
</tr>
<tr>
<td>Reduced VAT rates</td>
<td>6%, 0%</td>
</tr>
</tbody>
</table>

Where to register
Dutch Tax and Customs Administration
Kloosterweg 22
PO Box 2865
6401 DJ Heerlen, the Netherlands
+31 55 538 53 85

Periods for declaration
Calendar quarter

Reduced VAT rates
 Applies to, among other things:
6%
• Foodstuffs
• Medicines
• Books, newspapers and magazines
• Art

0%
• Exported goods
• Seagoing vessels

Source: PwC and European Commission, 2016
The iDEAL payment method again strengthened its position as the number one payment method in the Netherlands in 2015. iDEAL holds pole position, regardless the shopping device, and will keep its first place – and in all likelihood for the years to come. For local and international merchants aiming for Dutch consumers, iDEAL is crucial for success and a must-have for maximum conversion.

Increased competition and recent European regulation is driving down merchant charges for payment methods like iDEAL and MasterCard and Visa. Not only local but also international merchants aiming for Dutch online shoppers could benefit from better conditions by comparison of payment service providers and their current offering and rates.

Erik van den Heuvel
Chief Marketing Officer at About-Payments
iOS is the most-used operating system on mobile devices

**INTERNET BROWSERS DESKTOP**
Share of Internet browsers visiting Statcounter sites, 2015

- Chrome: 46.7%
- IE: 16.7%
- Firefox: 25.9%
- Safari: 7.5%
- Other: 3.2%

**OPERATING SYSTEMS DESKTOP**
Share of operating systems visiting Statcounter sites, 2015

- Win7: 46.6%
- Win8: 13.3%
- OS X: 20.6%
- Win10: 7.6%
- Winvista: 3.8%
- Others: 8.1%

**INTERNET BROWSERS MOBILE**
Share of Internet browsers visiting Statcounter sites, 2015

- Safari: 48.2%
- Chrome: 33.7%
- Android: 14.1%
- Other: 4.0%

**OPERATING SYSTEMS MOBILE**
Share of operating systems visiting Statcounter sites, 2015

- iOS: 50.3%
- Android: 47.8%
- Other: 1.9%

Source: Statcounter, 2016
See the Definitions page for Statcounter's research method
Facebook clearly has the most daily users

Country Report The Netherlands

DAILY SOCIAL MEDIA USAGE
In millions of users, 2014-2015

Google+: 1.3 (2014), 1.0 (2015)
Twitter: 1.5 (2014), 1.0 (2015)
Instagram: 0.54 (2014), 0.72 (2015)
LinkedIn: 0.3 (2014), 0.4 (2015)
Pinterest: 0.13 (2014), 0.26 (2015)

75% of the people who quit social media were worried about their privacy

36% of the people who quit Facebook did so because they did not trust them

Source: Newcom, 2015
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 tips and tricks that might help you when doing business in the Netherlands.

- Never brag about your own achievements or exaggerate your skills. Dutch people value modesty and anyone who tries to show off is frowned upon.
- Consensus guides the decision-making process in most Dutch organizations. This process may take longer than usual but when a decision is made, implementation is rather quick.
- Do not interpret your Dutch colleague’s direct communication style as rude or blunt. Dutch believe directness shows openness and honesty.
- Meetings are usually formal and well structured and as such, tend to adhere to the agenda.
- Do not only offer your services in a foreign language. Dutch consumers prefer websites in their own language.
- Avoid giving work-related compliments to individuals openly. Since most work is done in groups in Dutch business organizations, recognizing individual effort is not emphasized. Praise and criticism are better given in private.
- For more information about relevant regulations, please refer to the website of the Dutch Chamber of Commerce (www.kvk.nl/English).
Below, you will find some **practical tips** for online merchants that want to sell products and/or services in the Netherlands.

**Tips for online merchants**

- You are advised to apply for the “Thuiswinkel Waarborg” trustmark. This is recognized by 90% of Dutch consumers as a sign of trustworthiness.
- Make sure you are well organized and honest about your delivery options and times. Dutch online shops are among the leaders internationally when it comes to cut-off times.
- Dutch consumers can be considered price-sensitive. Small price differences may quickly lead them to buy elsewhere.
- You should definitely offer iDEAL as one of your payment option, as it is very popular in the Netherlands. As a matter of fact, it is preferred by 56% of Dutch shoppers.
- Dutch consumers do not like to be charged delivery costs as many companies are already able to send parcels for free. If your business model allows for free delivery, you should definitely consider it.
- Dutch consumers would like to see hassle-free return procedures, if the retailer has a physical store than it should be possible to return a product there.
- The Dutch tend to favour good-quality products. Consequently, they are more willing to splurge on expensive products when they perceive the product’s value is equal to its quality. The Dutch consumer does not have a bias for purchasing domestic products over their foreign counterparts. Moreover, good advertising campaigns have been popular among the Dutch consumer and highly effective on product sales.
- If the threshold is not exceeded, but the applicable VAT-rate of the country of arrival is lower than the VAT-rate of the country where the transport begins, the supplier could nevertheless opt to account for VAT of the country of arrival. Please note that this is only possible when certain conditions have been fulfilled.

Source: Ecommerce Foundation, PwC and Santander, 2016
Every country has its own rules and legislation. Therefore, when doing business in a foreign country, you should be aware of these.

On this slide, you will find an overview of the Netherlands’ most important laws and regulations, as well as some practical tips.

✓ **DO:** mention that the customer bears the direct costs of returning goods, unless agreed otherwise. If not mentioned, the trader has to bear those costs

✓ **DO:** state clearly on your website that you reimburse the customer without undue delay, and in any event not later than 14 days after the customer has made use of his right to withdraw from the contract

✓ **DO:** notice that in the Netherlands it is no longer necessary to obtain permission for placing cookies that have a limited impact on the user’s privacy. These include analytical cookies (e.g., statistics about the website’s usage) and a/b testing. All other sorts of cookies require notice and opt-in consent

✓ **DO:** state clearly on your website that if the customer does more with the product than he may reasonably do in a physical shop, he is liable for any damages to the product. If this is not mentioned, the customer may return the products regardless of its condition

✓ **DO:** offer at least one payment method enabling the customer to pay after receiving the ordered products. According to Dutch law, customers may not be forced to pay more than half the product price in advance

✓ **DO:** confirm the contract through a durable medium. An email is sufficient in this case

✓ **DO:** pay attention to the Dutch Data Protection Act (“Wet bescherming persoonsgegevens”) if you want to collect personal data. For instance, do not keep personal data any longer than is absolutely necessary and keep these only for specifically stated purposes, such as completing an order. Additionally, clearly state that the customer has the right to review, modify or delete his personal data

✓ **DON’T:** violate anti-spam-regulations. Pay attention to the Dutch Telecommunications Act (“Telecommunicatiwet”). For example, make sure you have obtained permission to send marketing emails. Sending marketing emails to existing customers for comparable products or services is allowed, but only if you give them a simple way to opt out before sending the first email as well as in all emails you send them.

✓ **DON’T:** omit the information about the consumer’s right to cancel or withdraw. When this information is not available on your website, the right will be extended from 14 days to 12 months
February 14 – Valentine’s Day
Dutch people celebrate Valentine’s Day. On this day people like to buy flowers, plush toys and gifts for their lovers.

Second Sunday in May – Mother’s day (May 8 in 2016)
On the second Sunday in May (Mother’s Day) people in the Netherlands honor their mothers and give them gifts.

Third Sunday in June – Father’s day (June 19 in 2016)
On the third Sunday in June (Father’s Day) people in the Netherlands honor their fathers and give them gifts.

December 5 – ‘Sinterklaas’
On December 5, people celebrates “Sinterklaas”, a holiday at which children receive gifts, which are often bought online.

December 24-26 – Christmas
Consumers like to shop for items such as food and presents for Christmas. Online shops should therefore take a shopping frenzy in the months of November and December into account.
Opportunities and Threats

Country Report The Netherlands

Opportunities and barriers

Naturally, the Netherlands offers both opportunities and threats for e-commerce companies. Below, we provide a short overview of some important opportunities and threats that you have to take into account when you are thinking about opening an online shop in the Netherlands.

Opportunities:

• The Netherlands is ranked second on the Logistic Performance Index.

• Online turnover of food/nearfood, fashion and toys grew very fast in 2015.

Threats:

• An ageing population. In general, older people shop online less often, due to trust issue, for instance.

• Satisfied Internet penetration (98%). As a result, there is little to no growth of the number of Internet users.
B2C e-commerce is booming in the Netherlands, and Thuiswinkel.org is striving to create an environment in which it can continue to do so. Not only do we issue a trustmark for online shops that is recognized by 90% of the Dutch consumers, we also put interesting projects that will help our members improve their online trading on the market.

For instance, ShoppingTomorrow is a knowledge platform on which retailers combine their forces to continuously explore the developments in consumer behavior, technology and the (international) market. In addition, the Thuiswinkel e-Academy bridges the gap between education and the e-sector. Together with trainers and companies, this action program will lead to more digital top talents and e-business professionals. With these and other programs, research and activities, we will lift our industry to a higher level.
Information about the Ecommerce Foundation and its Reports
Ecommerce Foundation

The Ecommerce Foundation is an independent non-profit organization, co-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 e-commerce research, reports, benchmarks and studies that could not have been possible on an individual basis.
Ecommerce Benchmark allows companies to compare & improve their e-commerce activities. Compare your performance with that of others in your industry at www.ecommercebenchmark.org

The Ecommerce Wiki is the online e-commerce guide for online retailers, corporate digital experts and students. Read all about e-commerce-related topic at www.ecommercewiki.org

Custom research is performed for a diverse set of companies, both co-branded and white-labeled. For more information, please go to www.ecommercefoundation.org

E-commerce Reports provide facts & figures on the most important e-commerce markets in the world. Download the light version or order the full versions through www.ecommercewiki.org
Information about the Reports

About the reports

The B2C E-commerce Reports are published by the Ecommerce Foundation. They provide overviews of the mature and emerging markets and of the major European and global statistics in the field of e-commerce.

In total, the Ecommerce Foundation will publish 12 country reports, covering the most important e-commerce markets worldwide. These include the United States of America, the United Kingdom, China and Brazil. In addition, it will publish a European and global overall report. For publication dates and prices, please see the table on the right.

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.ecommercewiki.org.

2016 prices and publication schedule

European overview report (€790)
• May 30

Global overview report (€790)
• September 29

Country reports (€95)
• The Netherlands April 7
• Belgium April 14
• United Kingdom April 21
• United States April 28
• Germany May 12
• France May 19
• Australia June 23
• Russia July 7
• Japan July 21
• China September 15
• Brazil October 13
• India October 27

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

Click here to order your full reports through our order form
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 Foundation 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.

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 2015 to 31 December 2015. 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 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 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, catalogs, etc. B2C e-commerce includes Value Added Tax (VAT) or other sales tax, delivery costs and apps, but excludes returns.
## Media & Entertainment

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

## Fashion

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

## Electronics

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

## Sports & Recreation

- Sports hardware (e.g. soccer shoes, tennis rackets)
- Bicycles & accessories
- Articles for camping and recreation
## Global Online Measurement Standard for B2C E-commerce (GOMSEC)

### About Ecommerce Europe

<table>
<thead>
<tr>
<th>Home &amp; Garden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Furniture and kitchens</td>
</tr>
<tr>
<td>Floor and window coverings (e.g. curtains and blinds)</td>
</tr>
<tr>
<td>Home textiles</td>
</tr>
<tr>
<td>Cookware (sets), kettles and oven equipment</td>
</tr>
<tr>
<td>Table and kitchen articles</td>
</tr>
<tr>
<td>Articles for cleaning, wash and store</td>
</tr>
<tr>
<td>Decoration</td>
</tr>
<tr>
<td>Lamps and fixtures</td>
</tr>
<tr>
<td>DIY-articles</td>
</tr>
<tr>
<td>Garden articles</td>
</tr>
<tr>
<td>Flowers and plants (in home)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Telecom</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphones, mobile phones &amp; mobile devices</td>
</tr>
<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>
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<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>Other: Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cars components</td>
</tr>
<tr>
<td>Glasses and contact lenses</td>
</tr>
<tr>
<td>Stationery</td>
</tr>
<tr>
<td>Pictures and photo albums</td>
</tr>
<tr>
<td>Pet supplies</td>
</tr>
<tr>
<td>Erotica</td>
</tr>
</tbody>
</table>
### Insurance

<table>
<thead>
<tr>
<th>New indemnity, Life and Health Insurances</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liability insurance</td>
</tr>
<tr>
<td>Car insurance</td>
</tr>
<tr>
<td>Fire and theft insurance</td>
</tr>
<tr>
<td>Bike/caravan/motorbike/Scooter insurance</td>
</tr>
<tr>
<td>Accident insurance</td>
</tr>
<tr>
<td>Boat insurance</td>
</tr>
<tr>
<td>Legal assistance insurance</td>
</tr>
<tr>
<td>Home insurance</td>
</tr>
<tr>
<td>Travel insurance (continuous/annual + short term)</td>
</tr>
<tr>
<td>Insurance package</td>
</tr>
</tbody>
</table>

### Travel

<table>
<thead>
<tr>
<th>Package Travel</th>
<th>Flight Tickets &amp; Accommodations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Package travel</td>
<td>Flight Tickets</td>
</tr>
<tr>
<td>Private transport if booked through a tour operator</td>
<td>Hotel stays</td>
</tr>
<tr>
<td>-&gt; all of the above not booked in combination with other travel-parts</td>
<td></td>
</tr>
</tbody>
</table>

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

About Ecommerce Europe

- **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

**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.
This 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.

This 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.

The sources consulted for the creation of this report include:

(Inter)national Associations
- Thuiswinkel.org (Netherlands)

Publications
- Statistics Netherlands
- CIA Worldfactbook
- Doingbusiness
- E-commerce Payment Monitor
- European Commission
- Eurostat
- IMF
- Statcounter
- Thuiswinkel Markt Monitor
- Tradingeconomics
- Twinkle top 100
- Worldbank

Corporate sources
- GfK
- LegalICT
- Newcom
- PwC
- Santander
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