KEY FIGURES

2016

FRENCH E-COMMERCE
FEDERATION (FEVAD)

www.fevad.com

B TO C E-COMMERCE

The Fevad Research Department performs, in-house or with different partners (official national and sectoral statistics institutes, survey and opinion institutes, professional federations...) permanent oversight of the economic performance of e-commerce markets. Each year it publishes a summary of the main data.

E-COMMERCE TURNOVER

In 2015, turnover grew 14% over 2014, with consumption still sluggish In 10 years; online sales have grown 675%.

€64.9 billion

source: Fevad iCE

+ 14% over 2014

835 million transactions online in 2015 +19% over 2014

source: Fevad iCE.

E-BUYERS, M-BUYERS

The number of French people buying online is up: + 850,000 buyers over one year.

35.5 million French people shop online

78.3% of Internet users

source: Médiamétrie - Observatoire des Usages Internet Q1 2016.

6.6 million French people have already made a purchase from their mobile phone.

source: Médiamétrie - Téléphonie et Services Mobiles – January March 2016, base: all individuals of 11 and over.

M-COMMERCE TURNOVER
(mobiles and tablets)

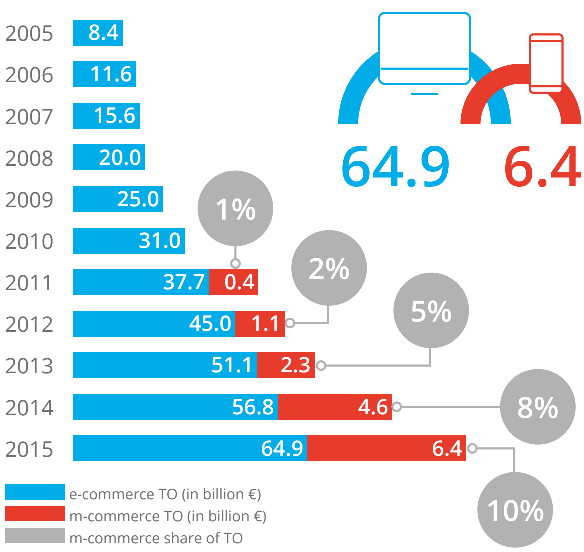
Sales on mobile phones continue to grow fast: In 2015 they reached 6.5 billion. On leader sites, sales on mobile phones and tablets represent almost 25% of total sales.

€6.4 billion

source: Fevad iCE.

+ 40% over2014

10% of e-commerce TO



source: Fevad iCE iCM.

E-COMMERCE MARKET SHARE

7% of retail commerce

source: Fevad - INSEE.

E-commerce continues to win market share; it represents + 7% of retail commerce. Several business sectors have already passed the 20% bar.

E-commerce market share and turnover by sector (estimates)

Sector	2015 Mark share	2015 TO
Tourism	43%	18,7
Cultural products (physical and virtual)	39%	3.0
Household textiles	25%	0.7
Games/ toys	22%	0.7
Hi-tech household equipment	21%	2.8
Household equipment Household appliances	17%	1.3
Clothing	15%	4.2
Furniture	12%	1.1
Shoes	11%	1.0
Sportswear (shoes, textiles, material, ski hire)	10%	1.1
Health and beauty	8%	0.7
Watches and jewellery	7%	0.4
Drive mass consumption products	4%	4.5

sources: Fevad with Fédération Française de la Chaussure, FPS, GfK, IFM, Ipea, Kantar Worldpanel, Nielsen, NPD Group/FCJPE, PhoCusWright/L'Echo touristique, Société 5/Franceclat.

E-COMMERCE AND JOBS

In 2014, the number of direct jobs in companies with over 10 people totalled 112,000 jobs.
According to the Fevad/LSA performed on leader sites, over half saw their workforce increase during 2015.
1 company in 2 also envisages an increase in 2016.

112,000
e-commerce jobs in 2014

source: Insee, TIC 2014 survey, number of full-time equivalent employees in e-commerce players.

57% of e-retailers increased their workforce in 2015

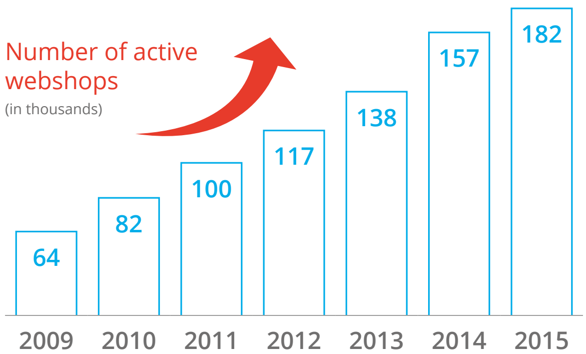
52% of e-retailers envisage an increase in their workforce in 2016

source: Baromètre Fevad/LSA performed on leader sites, March 2016.

E-RETAILERS

The growth in e-commerce is still strongly driven by growing supply; in 2015 there were over 182,000 active webshops, up 16% in a year.

The FEVAD estimates that the bar of 200,000 active trading sites should be passed in 2016.



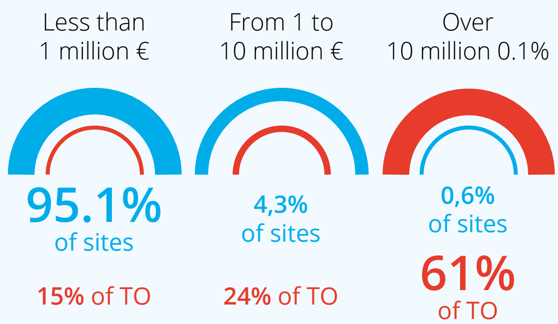
source: Fevad iCE.

Concentration of e-commerce TO

E-commerce TO remains concentrated, according to the Fevad, 85% of TO passing through 5% of trading sites (or around 9,000 sites).

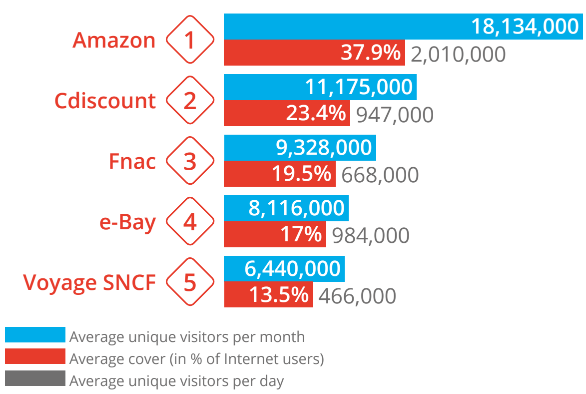
For the 1st time in the Fevad/Médiamétrie e-commerce ranking, a trading site has passed the bar of 2 million unique visitors a day.

Annual turnover tranches



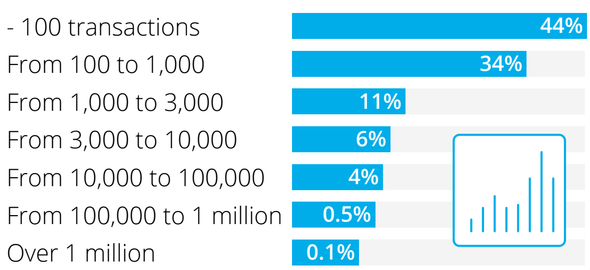
source: Fevad iCE.

Top 5 of the most visited webshops in France



source: Médiamétrie//NetRatings, average for January, February and March 2016.

Typology of webshops by number of transactions per year



source: Fevad iCE.

MARKET PLACES

Market places play an increasingly more important role in French e-commerce.
Turnover realised via market places is estimated at over 3 billion Euros.

34% of Internet users have made a purchase in market places over the last 6 months

source: Observatoire du consommateur connecté Fevad/Médiamétrie June 2016

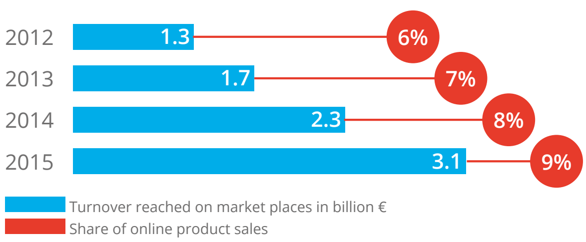
29% of key players in the online sales sector use a retail website or market place

source: Insee, TIC survey 2014.

Turnover reached on market places

9% of online product sales in 2015

source: Fevad iPM.



source: Fevad iPM, estimations.

PURCHASING BEHAVIOUR

The reduction in the average basket confirms the normalisation of online purchasing, which each year is rapidly catching up with the average amount of purchases made by French people on other e-commerce circuits.

€78 average amount of a transaction

- 4.5% over 2014

source: Fevad iCE.

On average
22.9 online transactions
and €1,780 per buyer in 2015

source: Fevad iCE.

E-COMMERCE, BRICKS AND MORTAR MOBILITY AND SOCIAL MEDIA

Online/bricks and mortar complementarity increasingly visible at each stage of the purchasing process.

Web to store

69% of in-store buyers have researched online before buying in store

Store to web

52% of online buyers have researched in store before buying online

source: Observatoire du consommateur connecté Fevad/Médiamétrie June 2016.

Mobility and store

44%	Use my mobile to flash QR-codes and/or bar codes on an advert, a magazine, a bulletin board...
43%	Use my mobile in store to find my way around the shelves, compare prices, check out customer opinions, check out the technical characteristics of a product
32%	Authorise my geo-localisation to receive personalised promotional campaigns nearby
31%	Use my mobile to contact social media when I buy something (Check a Facebook page, read reviews, make a comment, post a photo...)
29%	Being in store, but making the purchase on my mobile

In % of buyers with a mobile phone
source: Baromètre Fevad/CSA January 2016.

Customer reviews

49%

49% of Internet users have consulted user reviews online to help them choose which product to buy or which site to make their purchase on

source: Observatoire du consommateur connecté Fevad/Médiamétrie June 2016.

The Internet is increasingly a factor when deciding on purchases. 1 Internet user in 2 checks out reviews before buying.

PRODUCTS AND SERVICES PURCHASED

From a computer		From a Smartphone
47%	Adult clothing, Children	12%
40%	Technical products, household appliances	8%
40%	Travel/ tourism (excluding train tickets)	5%
33%	Cultural products	10%
29%	Health/ beauty	7%
25%	Home-wear	4%
21%	Games and toys	6%
19%	Spare parts and auto/ moto equipment	4%
18%	Sporting goods and equipment	5%

In % of Internet users, in % of mobile phone browsers, over the last 6 months
source: Observatoire du consommateur connecté Fevad/Médiamétrie June 2016.

C TO C

60% of Internet users have bought or sold on websites putting individuals into contact over the last 6 months (new or second hand cars)

source: Observatoire du consommateur connecté Fevad/ Médiamétrie June 2016.

PAYMENT

Bank Card	80%
Online portfolio	42%
Gift voucher	28%
Virtual Carte bleue	16%
Payment by instalment without charges	15%
Direct debit	14%

In % of buyers over the last 6 months
source: Observatoire du consommateur connecté Fevad/Médiamétrie June 2016.

SOCIAL COMMERCE

Social commerce has boomed over the last few years. Over one Internet user in 2 declares they want to use it in 2016.

39% of buyers used collaborative sites in 2015

62% plan to use it in 2016

	You used this online service in 2015	You envisage using it in 2016
Private holiday lets	21%	34%
Grouped purchases online directly from producers (AMAP, fruits and vegetables...)	9%	32%
Car sharing organised online (BlaBlaCar...)	17%	29%

source: Baromètre Fevad/CSA January 2016.

As a seller

16% used it in 2015

27% intend to use it in 2016

source: Baromètre Fevad/CSA January 2016.

DELIVERY

Delivery has become a true marketing lever in e-commerce, particularly via alternative delivery methods ("same day") or premium type services (subscription)

Delivery straight to your door	86%
Delivery to pick-up point	68%
Withdrawal or release in the brand's store	25%
Post offices	25%
Delivery to the workplace	12%
Consignment	8%

In % of buyers over the last 6 months
source: Observatoire du consommateur connecté Fevad/Médiamétrie June 2016.

450 million packages in 2015

source: Fevad estimate.

Click-to-possession (in calendar days)

For the first time, thanks to its e-commerce logistics intelligence unit, the Fevad is publishing a series of key indicators for logistics such as "click-to-possession", average time from ordering to receipt of the package. The unit's data is available on the Fevad site.

5.3 days on average

source: Observatoire logistique e-commerce Fevad, data from January 2015 to February 2016.

E-COMMERCE IN EUROPE

Europe is the 3rd biggest e-commerce market worldwide, behind China and the United States. Two thirds of sales in Europe are made in the United States, France and Germany. The potential for growth in Europe remains high because 15% of European e-buyers purchase online from foreign sites. At the level of Fevad members, over 60% of companies sell abroad.

€455 billion in 2015

+ 13% over 2014

source: Ecommerce Europe (estimates).

Top 5 European countries

		in 2015	in 2016 (p)
1	UNITED KINGDOM	157.0	173.7
2	FRANCE	64.9	71.4
3	GERMANY	59?7	66.9
4	SPAIN	18.2	21.0
5	ITALIE	16.6	19.1

E-commerce B to C turnover in billion €
source: Ecommerce Europe.

52% products, 48% services

8% of retail commerce

+ 4.2 billion packages a year	+ 750,000 webshops
296 million buyers online	57% of Internet users

+ 2.5 million jobs created by e-commerce

(direct and indirect jobs)

source: Ecommerce Europe (estimates).

Top 5 countries Fevad countries have a presence in:

1	BELGIUM	86%
2	SPAIN	69%
3	ITALY	64%
4	GERMANY	57%
5	UNITED KINGDOM	53%

source: Baromètre Fevad/LSA, performed on leading sites, March 2016.

E-COMMERCE WORLDWIDE

China has overtaken the United States to assume global leadership. In e-commerce compared with the population, the United kingdom is the world's largest market.

€1,988 billion in 2015

+ 20% over 2014

O/w 12% cross border sales (€240 billion)

source: Ecommerce Europe (estimates).

Top 5 countries worldwide

1	CHINA	691
2	UNITED STATES	537
3	UNITED KINGDOM	157
4	JAPAN	96
5	FRANCE	65

B to C e-commerce turnover in billion € in 2015; China: B to C and C to C
source: Ecommerce Europe (estimates).

France 5th worldwide

Despite Internet connection rates equivalent to the European average (83%), levels of e-buyers in France are 12 points below the European average (65% versus 53%).

CROSS-BORDER

The cross-border phenomenon in France (buy/sell) is expanding. This should increase in coming years, particularly under the aegis of European policy (Digital Single Market Strategy) which seeks to establish a true European internal market in the digital field and in e-commerce in particular.

46% of Internet users have already bought something online from abroad

source: Observatoire du consommateur connecté Fevad/Médiamétrie June 2016.

50% of players in online sales established in France get orders from customers located abroad

source: Insee, TIC 2014 survey, all business, except financial sector, 10 or more people employed.

B TO B E-COMMERCE

Inter-company e-commerce is a key challenge for the future of e-commerce, but also for the French economy in general bearing in mind its impact on the competitiveness of all economic players. According to estimates*, it already represents a market of 500 billion Euros, and still has significant growth potential that should be realised in coming years.

B TO B E-COMMERCE MARKET SHARE

in 8 business sectors

Inter-company e-commerce already weighs 18% of the total amount of sales to professionals.
Excluding business trips, the weight of e-commerce in all sales is 11%.

18% of the total B to B sales in 2015

7% from an e-commerce site

11% from an e-procurement solution

source: Source: Fevad/DGE research into digital transition & B to B commerce realised by Next Content in collaboration with the Crédoc October 2015.

Sale of B to B e-commerce sales by sector

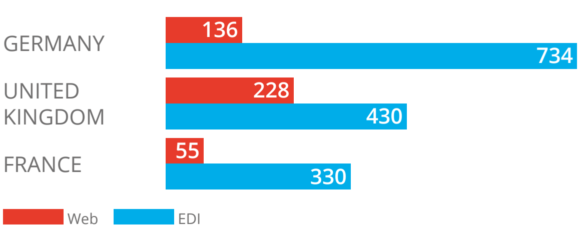
Travel, transport	53%
Boating equipment/supplies	33%
Computer equipment	30%
Medical equipment/supplies	25%
Tyres	25%
Industrial/commercial/service supplies and equipment	21%
Automobile parts and equipment	13%
Equipment and supplies/HCR	9%
Materials and equipment/construction	5%
Foodstuffs/HCR	2%

sources: Fevad/DGE research into digital transition & B to B commerce realised by Next Content in collaboration with the Crédoc October 2015.

B TO B E-COMMERCE IN EUROPE

Values of electronic B to B sales by country

(in billion €)



source: Insee (France), ONS (United-Kingdom), IFH Kôln on the basis of data from the German Federal Statistics Officer (Germany).
2013 data for France and UK, 2012 for Germany.

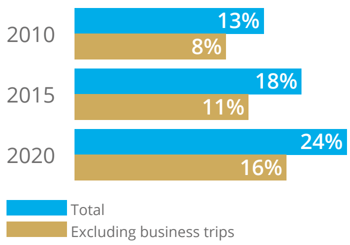
2020 PROJECTIONS

for 8 business sectors

Inter-company electronic transactions (from an e-commerce site or from personalised digital solutions) could make up almost a quarter of sales by 2020.

+ 32% growth

24% of the total B to B sales



source: Next Content Estimate - Crédoc for the Fevad and the DGE.
In the field of the 8 sectors studied, excluding telecom and pharmacies.

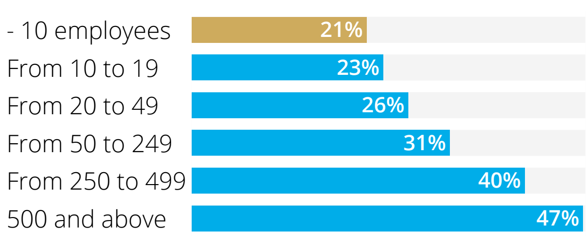
E-BUYERS

According to the Insee, just over 20% of all French companies make purchases electronically (via a website or via EDI). Electronic purchases are more common in larger companies, mainly due to the use of EDI.

EDI: sdigital data exchange system.

25% of companies with over 10 employees buy online
(web or EDI)

21% of companies with less than 10 employees buy online



source: Insee, TIC survey 2014, 2013 data.
2012 data for companies with less than 10 employees.

* Fevad Study "Digital transition and B to B commerce" - 2015

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This data comes from research performed by the Fevad and its partners. For more information please visit www.fevad.com

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