

E-commerce in France Key Figures

FRENCH E-COMMERCE
FEDERATION (FEVAD)

2018



www.fevad.com

Business to Consumer

Growth in e-commerce BtoC continued in 2017
Particularly due to the effect of an increase in supply and purchase frequency. This growth also comes from the breakthrough in mobile sales.

E-COMMERCE TURNOVER

Overall sales on the Internet grew by 14% year on year. The share of Internet sales made through mobile devices continues to increase sharply, up 50%. They are worth over 20% of the turnover of e-commerce sites and over 30% for leading sites.

81.7
billion euro

Up 14.3%
compared to 2016

Source: Fevad ICE.

1.247
billion

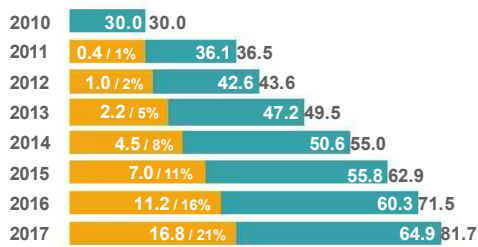
Online transactions in 2017
up 20.5% compared to 2016

Source: Fevad ICE.

21% on mobile terminals

Source: Fevad ICE.

E-commerce sales in billions of €



Legend:
■ Mobile terminal share
■ Computer
■ E-commerce sales

source: Fevad ICE ICM.

E-BUYERS, M-BUYERS

Internet users who buy online reached the 85% mark in 2017, driven both by the spread of new Internet screens, the increase in websites and the broadening of products/services on offer.

37.5 million French people shop online

85.5% of Internet users

Source: Médiamétrie - Observatoire des Usages Internet - Q1 2018, Basis: all individuals aged 11 and over

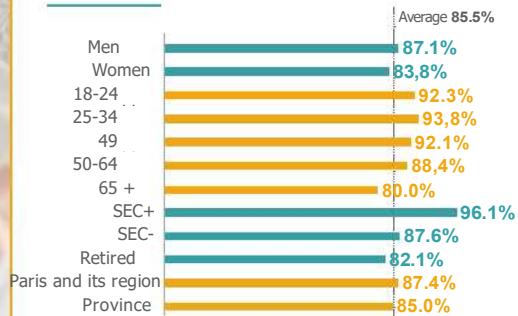
of which
12.1
...

French people have already made a purchase from their mobile

That is, 30% of mobile users last month

Source: Médiamétrie - Observatoire des Usages Internet - Q1 2018, Basis: all individuals aged 11 and over.

Share of e-buyers by target of internet users



Source: Médiamétrie - Observatoire des Usages Internet Q1 2018 All places of connection.

E-COMMERCE SHARE

E-commerce continues to gain market share. In 2017 it was estimated to be 8.5% of retail trade.

8.5%
of retail trade

Source: Fevad with INSEE.

Market share and e-commerce sales by sector (estimates)



Legend:
■ PDM 2017
■ 2017 sales in billions of eur
 Source: Fevad with GfK, IFM, Ipea, Nielsen.

E-COMMERCE AND EMPLOYMENT

E-commerce is a very dynamic sector for employment. The outlook for 2018 for creating new jobs remains very positive.

Leading websites

63% of sites increased their numbers in 2017

54% plan to increase their numbers in 2018

Source: Fevad/LSA indices conducted on leading sites – February 2018.

VSE/SME

18% of VSE/SME e-merchants recruited at least one employee in 2017

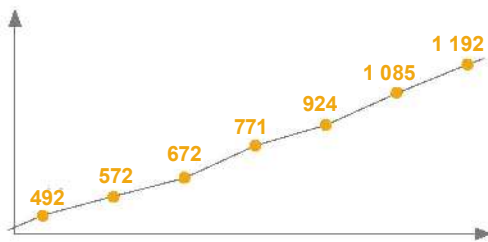
24% expect to recruit at least one employee in 2018

Source : Profitability of special VSE-SME e-trader, Oxatis/Kpmg – January 2018.

E-MERCHANTS

182,000 active merchant sites

Source: Fevad ICE Q1 2018



2011 2012 2013 2014 2015 2016 2017
Annual indices basis in 2005 (14,500 sites in 2005) Source: Fevad ICE.

Profitability of leading sites

68% in profit

9% breaking even

23% making a loss

Source: Fevad/LSA indices conducted on leading sites – February 2018.

Profitability of VSE/SME sites

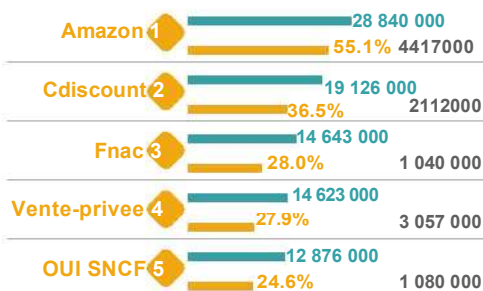
65% in profit or breaking even

35% making a loss

Source: Profitability of special VSE-SME e-trader, Oxatis/Kpmg – January 2018.

Top 5 most visited sites and e-commerce applications in France Global Internet

The Global Internet Audience measurement ranks e-commerce sites and apps across all screens (computer, mobiles, tablets) in line with the multi-channel and multi-screen behaviour of consumers.



Legend:
█ Average unique visitors per month
█ Average monthly coverage (% of French population)
█ Average unique visitors per day

Source: Médiamétrie//NetRatings – Average Q1 2018 France Internet audience all screens.

Distribution of e-commerce activity by e-merchant size

E-commerce turnover remain concentrated: 87% of sales go through 5% of shopping sites (9,000 sites).

Less than €100,000 per year
2.5% of market turnover
77% of sites

From €100,000 to 1 million euro per year
10.9% of market turnover
18.1% of sites

From 1 to 10 million euro per year
4.3% of sites
21.4% of market turnover

Over 10 million euro per year
0.6% of sites
65.2% of market turnover

Turnover achieved in its own right or on behalf of third parties.

Source : Fevad iCe

MARKETPLACES

Marketplaces are becoming an increasingly important part of e-commerce business. Business volume achieved via marketplaces represents 29% of the total business volume for the sites that host them.

The merchants on the marketplaces

Businesses with more than 10

38% 15% sell online of which 38% on marketplaces

Source: INSEE, ICT business survey 2017.

Businesses with fewer than 10

50% 6% sell online of which 50% on marketplaces

Source: INSEE, ICT-VSE survey 2016.

Marketplaces business volume

(from the Fevad iPM panel)

29% of total business volume of iPM Fevad panel sites

Source: Fevad iCE.

That is up 15% compared to 2016

FREQUENCY OF PURCHASE, PRODUCTS AND SERVICES

The frequency of purchases on the Internet continues to increase: 54% of Internet users purchased online in the last month, up 1 point in one year (Source: Médiamétrie).

The average transaction amount continues to fall, each year coming a little closer to the average amount of purchases on other distribution channels. Increased supply, m-commerce and new logistical approaches have helped increase the phenomenon for 2 years.

€65.5 average amount of a transaction

Source: Fevad iCE

down 5% compared to 2016

33 transactions on average online

and nearly **€2,200** per buyer in 2017

Source: Fevad-Médiamétrie/NetRatings.

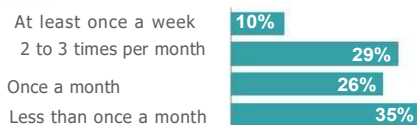
Products and services purchased online



% of e-buyers.

source: Fevad/CSA trend barometer – January 2018.

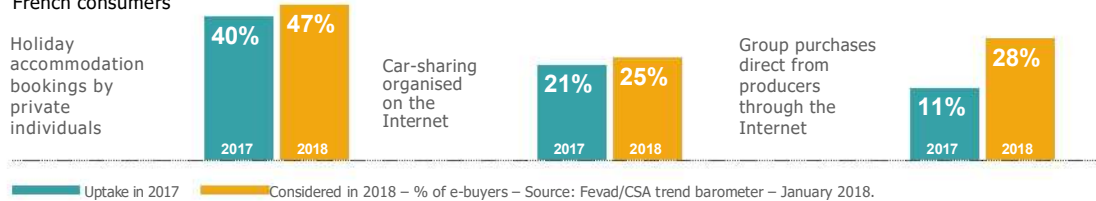
Frequency of purchase on the Internet



Source: Fevad/CSA trend barometer – January 2018, % of e-buyers.

Social commerce

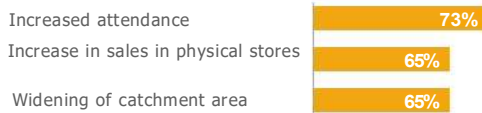
Collaborative consumption becoming increasingly appealing to French consumers



CONNECTED TRADE, MOBILITY AND SOCIAL NETWORKS

Internet/store complementarity is increasingly present at all stages of the purchase, reinforced by the growing use of mobile screens throughout the purchasing process. Another upward trend is the use of social networks in shopping relationships.

Impact of websites on the physical stores of VSE/SMEs



Source : As % of e-traders – Profile of special VSE-SME e-trader, Oxais / KPMG - January 2018

33% of e-buyers, when picking up an order from a collection point or store, bought other products at this collection point or store

% of e-buyers who have used point-of-sale or in-store collection source: Fevad/CSA trend barometer – January 2018.

The mobile phone – driving sales

Mobile usage for shopping

61% to follow my purchases on the Internet

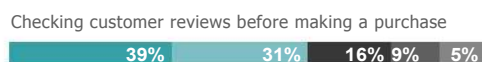
57% ...to do some research before buying a product (in-store or on the Internet)

52% ... to search for and locate stores

% of e-buyers equipped with a mobile. Source: Fevad/CSA trend barometer – January 2018.

Social network usage

70% of e-buyers often check customer reviews before making their purchases

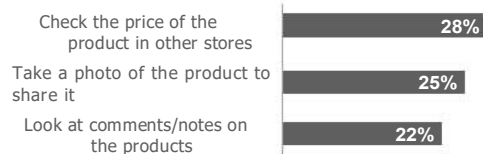


Legend: Very often (dark teal), Often (medium teal), Occasionally (light teal), Sometimes (grey), Never (dark grey)

% of e-buyers – Source: Fevad/CSA trend barometer – January 2018

Mobile usage for shopping in-store

60% of internet users with a mobile phone have already used their mobile in-store to:



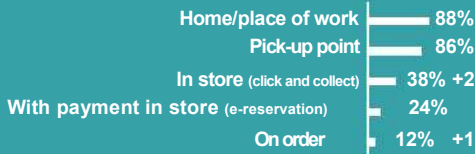
Source: Fevad/Médiamétrie survey – January 2018.

DELIVERY

Delivery options are increasing, offering more and more services to e-buyers.

34% of e-buyers subscribe to a delivery service

source: Fevad/CSA trend barometer - January 2018



% of e-buyers – Source: Fevad/CSA trend barometer – January 2018.

PAYMENT

A very large proportion of e-commerce product sales is paid for by credit card.

85% bank cards
9% online portfolios

- 1% cheques
- 1% gift vouchers, transfers/direct debits, cash on delivery
- 3% private cards and other payment methods

As a % of e-commerce product sales turnover in 2016.
Source: Fevad survey – January 2017

505 million packages in
up 10.5% compared to 2016

Source: Fevad 2018 estimate, B to C packages including C to B and e-C to C packages.

E-COMMERCE IN EUROPE

In Europe, 85% of Europeans use the Internet and 57% buy online (in France 88% and 67% respectively). Source: Eurostat – 2017.

540 billion euro in 2017
+12.8% compared to 2016

source: Ecommerce Foundation.

Top 5 European countries

	in 2017	in 2018 (p)
1 United Kingdom	157	178
2 Germany	85	93
3 France	82	93
4 Spain	24	28
5 Italy	21	28

B2C e-commerce sales in billions of euro – (p): Forecasts – Source: Ecommerce Foundation.

CROSS-BORDER

Every year, more and more Europeans shop online internationally (in Europe or outside Europe). In France, over half of merchant sites, small or large, record sales internationally.

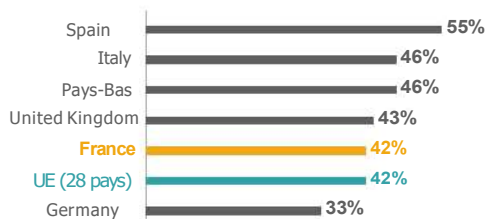
International purchases

42% of French e-buyers

42% of European e-buyers

in 2017 ordered goods or services from sellers in other countries over the Internet (inside and outside the EU)

Source: Eurostat – 2017.



% of e-buyers – Source: Eurostat – 2017 .

International sales

62% of leading sites sell abroad

Source: Fevad/LSA conducted on leading sites - February 2018

The top 5 countries where Fevad businesses are present

1 Belgique	79%
2 Spain	60%
3 Germany	57%
4 United Kingdom	52%
5 Italy	47%

As a percentage of sites that sell abroad.
Source: Fevad/LSA trend barometer conducted on leading sites - February 2018.

51% of VSE/SME e-traders sell internationally

Sources : Profile of specialised VSE-SME e-trader, Oxatis/Kpmg – January 2018. Oxatis/Kpmg – January 2018.

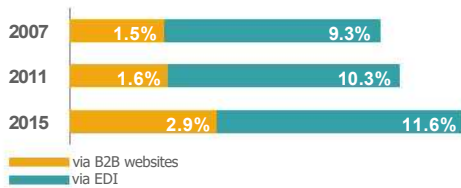
Business to Business

In 2015, inter-company electronic transactions carried out either through EDI-type messages (electronic data interchange) or via Websites, were 14.5% of total turnover by companies of 10 people or more established in France, nearly 3 points more compared to 2011.

B2B E-COMMERCE SALES

This 3-point increase is due in large part to the dynamism of online sales, which represent 85 billion euro carried out by companies with more than 10 people, plus 15 billion euro by those with fewer than 10 people.

Weight of electronic B2B sales in total business sales



source: INSEE, Business ICT surveys 2008, 2012, 2016 – companies with 10 or more people.

Value of electronic B2B sales

in billions of euros

338

B2B sales for businesses with more than 10 people via EDI

85

B2B sales for businesses with more than 10 people via websites

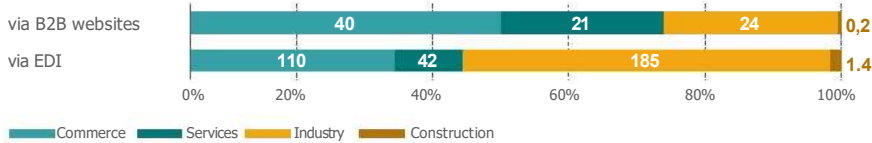
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B2B sales for businesses with fewer than 10 people via websites

Source: INSEE, ICT business surveys 2016 et ICT-VSE 2016 (excluding the self-employed).

Distribution of B2B sales according to sector

as a% and in billions of euro



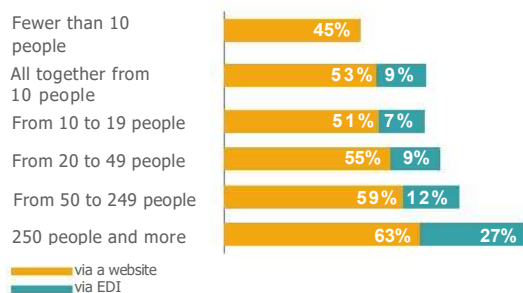
source: INSEE, ICT business survey 2016 – companies with 10 or more people.

According to INSEE, half of B2B web sales are carried out by trading companies

B2B E-BUYERS

Nearly half of businesses with fewer than 10 people, and more than half of businesses with more than 10 people, shop online. EDI purchasing is carried out by 9% of businesses with more than 10 people, especially in the largest (27%).

53% of businesses with more than 10 employees make purchases from an e-commerce site.



Source: INSEE, ICT business survey 2016 – ICT-VSE 2016.



Federation of E-Commerce and Distance Selling

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