



KEY FIGURES 2019

THE E-COMMERCE AND MAIL ORDER SALES
FEDERATION (FEVAD)



www.fevad.com

RETAIL E-COMMERCE

Retail e-commerce has maintained its progress, carried forward by increases in consumer numbers and purchase frequencies, the development of new offers and new customer services. This growth has also been influenced by the continued progression of purchases using mobile devices.

E-COMMERCE

TURNOVER

Growth in internet sales turnover has continued to be expressed in 2 figures. The € 100 billion mark should be reached by 2019. Purchases using mobile devices continue to grow. This has now reached a 22% share of e-commerce sales turnover and represents 35% for the leading web-sites (a 5 point increase over the year).

€92.6 BILLION
source : Fevad iCE.

+ 13,4%
compare to 2017

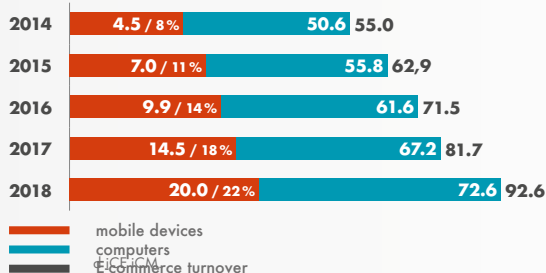
1,505 billion
source : Fevad iCE.

online transactions in 2018
+20.7 % compared to 2017.

22% using mobile devices

source : Fevad iCE.

E-COMMERCE TURNOVER (IN €BILLION)



MARKET SHARE AND TURNOVER

(Estimated)

E-commerce continues to gain new market sectors and reached 9.1 % for the whole retail sector in 2018.

9,1%
of the retail sector*

* Excluding fuel, pharmaceuticals, medical and orthopaedic items source : Fevad with the INSEE.

E-BUYERS, M-BUYERS

For all device types, almost 9 out of 10 internet users now make purchases via the internet. This represents 1 million new consumers in the space of a year, notably concerning under 35s with the increasing use of smartphones but also over 65s, of whom 8 out of 10 now make purchases via the internet.

38,8 million French people make purchases on the internet

87,5 % of internet-users

source : Médiamétrie - Observatoire des Usages Internet - T1 2019.

Dont
13,8
millions

French people have already made purchases using their mobile device

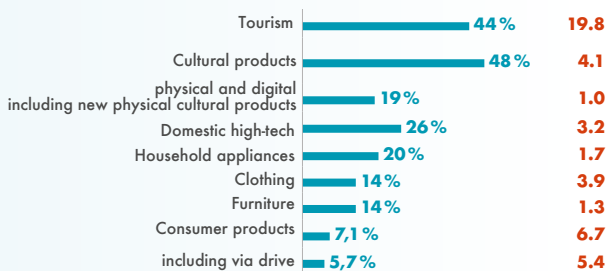
33%
of which were "last month" mobile device users

source : Médiamétrie - Observatoire des Usages Internet (Internet Use Observatory) - 1st Quarter 2019.

DISTRIBUTION OF E-BUYERS BY INTERNET-USER TARGET GROUP



source : Médiamétrie - Observatoire des Usages Internet (Internet Use Observatory) - 1st Quarter 2019.



— PDM 2018 — CA 2018 en milliard d'€

source : PhoCusWright/Enjeux e-Tourisme Fevad, GfK, IFM, Ipea, Nielsen.

E-COMMERCE AND EMPLOYMENT

The sector's company managements have a high degree of confidence in their futures; many of them have increased staff levels in 2018 and expect to continue to do so in 2019.

LEADING WEB-SITES



source: Baromètre Fevad/LSA concerning leading web-sites - February 2019.

SMALL TO MEDIUM SIZE ENTERPRISES



source: Specific small to medium size E-commerce business profile, Oxatis/Ernst&Young - January 2019

180 000
PERSONNES
(emplois directs)

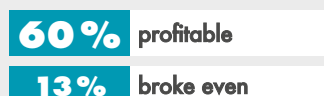
source : estimation Fevad.

E-MERCHANTS

180 000
ACTIVE MERCHANT
WEB-SITES

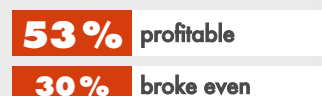
source: Fevad iCE - 1st Quarter 2019.

PROFITABILITY OF THE LEADING WEB-SITES



source: Baromètre Fevad/LSA concerning leading web-sites - February 2019.

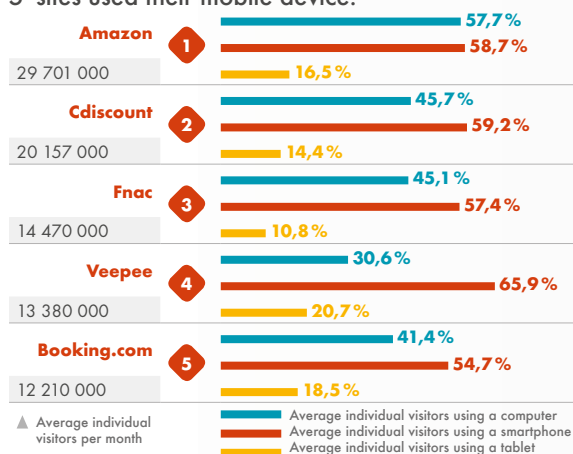
PROFITABILITY OF SMALL TO MEDIUM SIZE WEB-SITES



source: Specific small to medium size E-commerce business profile, Oxatis/Ernst&Young - January 2019.

THE TOP 5 GLOBAL E-COMMERCE WEB-SITES AND APPS VISITED BY FRENCH USERS

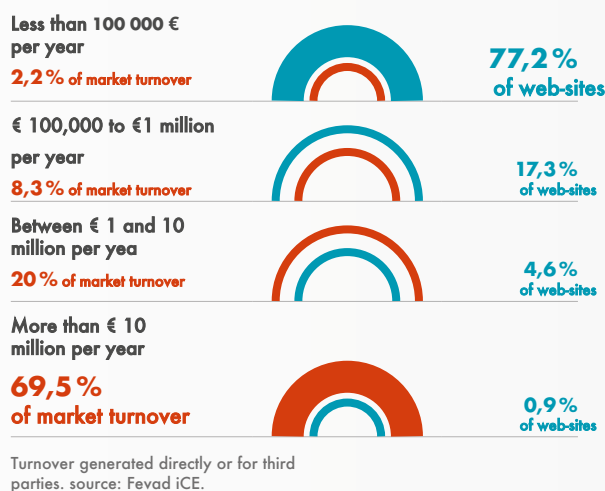
The audiences of the most visited E-commerce web-sites continue to grow. This growth has been accompanied by an increase in visits via mobile devices: more than 50% of visitors to Top 5 sites used their mobile device.



Source : Médiamétrie//NetRatings- Average - 1st Quarter 2019 France - Internet audience for all devices.

DISTRIBUTION OF E-COMMERCE SALES BY E-MERCHANT SIZE

Three quarters of web-sites generate an annual turnover of less than € 100,000 per year. E-commerce turnover remains concentrated: 90% of turnover generated by 5.5% of merchant sites (10,000 web-sites).



BUSINESSES AND E-COMMERCE

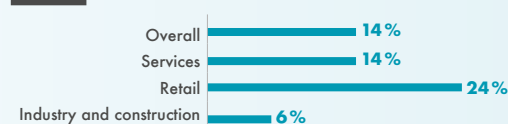
14% of businesses with 10 or more employees make e-commerce sales. This proportion has remained stable over the last 3 years and increases with business size. In Retail, almost one in four businesses makes e-commerce sales.

SHARE OF BUSINESSES THAT MAKE E-COMMERCE SALES BY SIZE



source: INSEE, TIC 2018 survey, companies with 10 or more employees.

SHARE OF BUSINESSES THAT MAKE E-COMMERCE SALES BY SECTOR



source: INSEE, TIC 2018 survey, companies with 10 or more employees.

MARKET PLACES

Of all businesses with ten or more businesses that make online sales; 38% of them make sales on market places; this figure increases to 47% for businesses with 10 to 19 employees.

MERCHANTS ON THE MARKET PLACES

Overall	62	25	13	38 %
250+ employees	68	23	9	32 %
50 to 249 employees	72	19	9	28 %
10 to 49 employees	58	27	15	42 %

■ direct by web-site
■ market place and direct
■ market place

As a % of companies which make sales on an e-commerce web-site.

source: INSEE, TIC 2018 survey, companies with 10 or more employees.

29 % of small to medium merchant web- sell on market places

source: Specific small to medium size E-commerce business profile, Oxatis/Ernst&Young - January 2019.

BUSINESS VOLUME FOR MARKET PLACES (as listed by the iPM Fevad)

30 % of overall turnover for sites on the iPM Fevad listing

+ 16 % compared to 2017

source : Fevad iCE.

45 % of small to medium businesses declare the impact of market places on their turnover is significant (11 % to 20 % of their turnover) to very significant (21 % to 100 %).

source: Specific small to medium size E-commerce business profile, Oxatis/Ernst&Young - January 2019.

PURCHASE FREQUENCY,

PRODUCTS AND SERVICES PURCHASED

Internet purchase frequency continues to grow as the average transaction total decreases. These developments are a reflection of new trends in internet purchasing behaviour as purchases come to involve more and more everyday items.

61,5 € | **-6 %**
 average transaction total
 compared to 2017.
 source : Fevad iCE

39 average online transactions
 and **2420 €**
 per buyer in 2018
 source : Fevad-Médiamétrie//NetRatings.

55,5 % | **Soit +1.3 point par rapport au T1 2018**
 of internet users had made purchases during the previous month.
 in the 1st quarter of 2019

source : Médiamétrie - Observatoire des Usages Internet - T1 2019. (Internet Use Observatory) - 1st

PRODUCTS AND SERVICES PURCHASED ON THE INTERNET

Clothing/fashion	58 %	Second-hand or reconditioned good	17 %
Cultural products	50 %	Online film subscriptions	15 %
Travel/tourism	40 %	Flowers	13 %
Games, toys	39 %	Box subscriptions	12 %
Footwear	39 %	Meals	12 %
High-tech products / household appliances	38 %	Collective money-saving services (private car hire, car sharing, private accommodation rentals, etc.)	12 %
Beauty/health	34 %	Non-prescription medicines	10 %
Home, decoration	32 %	subscriptions (home, healthcare, sport, etc.)	10 %
Textiles	28 %	Wine	10 %
Sporting items and equipment	24 %	School supplies	9 %
Food, consumer products	20 %	Online course enrolments (MOOC)	8 %
VOD, music	19 %	Glasses, contact lenses	7 %
Gift vouchers for use in shops or online	19 %	Glasses, contact lenses, private lessons, babysitting, DIY gardening, etc.)	7 %
Online music subscription fees	18 %		
DIY, gardening	17 %		
Car/motorbike spare parts, accessories	17 %		
\$^n	17 %		

As a % of e-buyers

source: Baromètre Fevad/CSA - January 2019.

CONNECTED COMMERCE AND MOBILITY

Purchasers increasingly associate e-commerce, physical shops and mobile devices throughout their buying experience. More and more businesses are declaring that such combinations are successful.

THE IMPACT OF WEB-SITES ON PHYSICAL RETAIL OUTLETS

80 % of e-merchants have observed that their web-site has an effect on their shops:

79 %	increase in visits to physical shops
63 %	increase in physical shop turnover
42 %	broadener catchment area

source: Specific small to medium size E-commerce business profile, Oxatis/Ernst&Young - January 2019

28 % of e-buyers have picked up an online order from a dedicated pick up point or high-street shop in order to purchase other items in the dedicated pick up point or high-street shop

As a % of e-buyers that have used dedicated pick-up point or high-street shop delivery options. source: Baromètre Fevad/CSA - January 2019.

MOBILE, PURCHASE DRIVER

E-buyers with mobile phones use their mobile phone to:

56 %	... research before purchasing a product or service
56 %	... trace their internet purchases
52 %	... search and locate shops
38 %	... find their way around a shop, compare prices, consult consumer reviews, consult product information, etc

source: Baromètre Fevad/CSA - January 2019.

DELIVERY

There is an increasing number of delivery options proposing more and more services to e-buyers.

36 % of e-buyers are subscribed to a delivery service

source : Baromètre Fevad/CSA - janvier 2019.

DELIVERY OPTIONS USED

86 %
Direct to home

83 %
To a dedicated pick up point

38 %	To a high-street shop (click and collect)
24 %	With payment on collection (e-reservation)
13 %	At a place of work
9 %	At a deposit boxAt a deposit box

As a % of e-buyers.
source: Baromètre Fevad/CSA - January 2019.

PAYMENT

Bank cards continue to dominate for online payments, accompanied by a growth in 3 or 4 instalment payment plans (+1 percentage point compared to 2017). Another trend is the growing use of electronic wallet payments (an increase of almost 2 percentage points compared to 2017).

PAYMENT METHODS USED

80.1 %
Bank cards

11.5 %
Online electronic walletse

3.9 %	Consumer loans
0.9 %	Bank transfers/direct debit
3.7 %	Other payment methods (private cards, cheques, gift vouchers, COD, shop/agency payments, cash mandates, cheque letters, etc.)

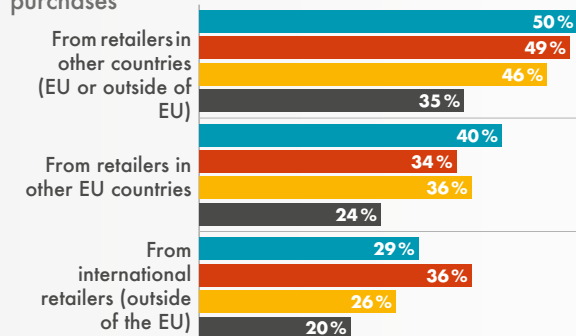
As a % of e-commerce turnover for the sale of products in 2018. source: Fevad survey - January 2019.

CROSS-BORDER

Every year more and more Europeans make international online purchases (inside and outside of Europe). The proportion of cross-border buyers in France is larger than in the United Kingdom or Germany. More than half of merchant sites sell internationally, regardless of their size.

INTERNATIONAL PURCHASES

% of buyers making international purchases



Legend:
 France (blue)
 United Kingdom (orange)
 EU (28 countries) (yellow)
 Germany (grey)

source : Eurostat 2018.

INTERNATIONAL SALES

66% of leading web-sites make international sales

source: Baromètre Fevad/LSA concerning leading web-sites - February 2019.

Top 5 countries in which Fevad businesses are active

1	Belgium	90%
2	Spain	72%
3	Germany	65%
4	Italy	63%
5	United Kingdom	50%

as a percentage of web-sites that make international sales

source: Baromètre Fevad/LSA concerning leading web-sites - February 2019.

57% of small to medium size e-merchants sell internationally

source: Specific small to medium size E-commerce business profile, Oxatis/Ernst&Young - January 2019

E-COMMERCE IN EUROPE AND THE REST OF THE WORLD

Europe currently represents 30% of global e-commerce turnover. France is the 2nd largest e-commerce market in Europe, after the United Kingdom. Taking population size into account, the United Kingdom is the world's leading market.

E-COMMERCE IN EUROPE



Top 4 countries

1	United Kingdom	174.9
2	France	92.6
3	Spain	28
4	Italy	27.4

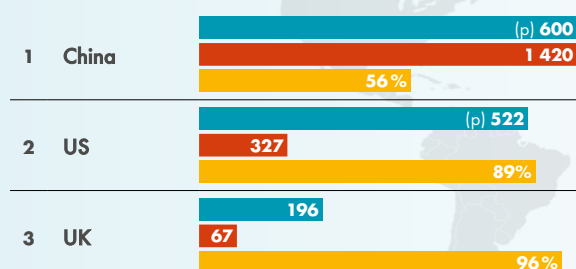
Germany: ND. 2018 e-commerce B2C turnover in €billions.

source: Ecommerce Foundation

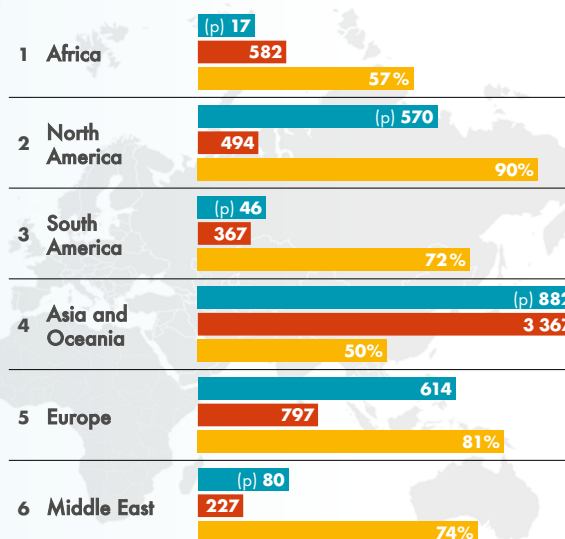
E-COMMERCE IN THE REST OF THE WORLD



Top 3 des pays dans le monde



Legend:
 2018 e-commerce B2C turnover in \$billions- (f) forecast.
 source: Ecommerce Foundation..



Legend:
 Population in millions of individuals
 Internet access

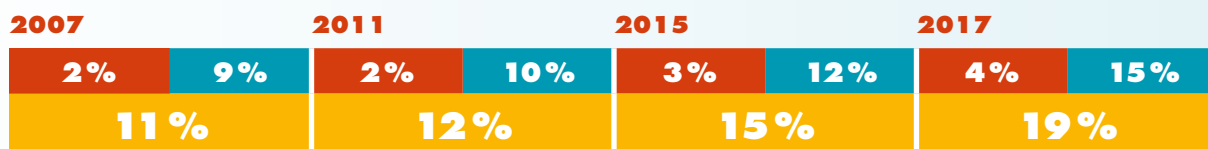
E-COMMERCE TO PROFESSIONALS

In 2017 inter-company electronic transactions completed either using EDI messaging or e-commerce sites represent 19% of total turnover for businesses with 10 or more employees based in France, this represents a 4 percentage point increase over 2015. This had already increased by 3 percentage points between 2011 and 2015.

B2B E-COMMERCE SALES

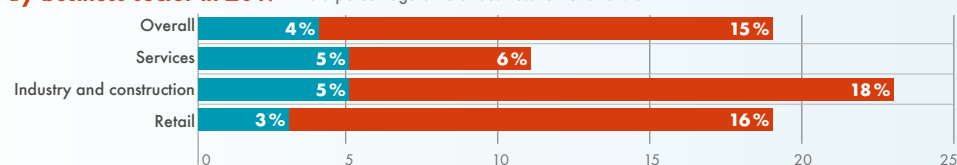
Over the last two years B2B sales via web-sites increased significantly, by almost 50%. Total turnover for 2017 came to almost €150 billion, € 126 billion of which concerned businesses with ten or more employees and more than € 15 by businesses with less than ten employees (INSEE TIC-TPE 2016 survey).

THE SHARE OF ELECTRONIC B2B SALES IN THE TOTAL TURNOVER OF BUSINESSES



source: INSEE, TIC 2018, 2016, 2012, 2008 surveys of companies with 10 or more employees.

By business sector in 2017



source: INSEE, TIC 2018 survey, companies with 10 or more employees

B2b Sales on B2b web sites are

150

billions € in 2017

VALUE OF B2B ELECTRONIC SALES

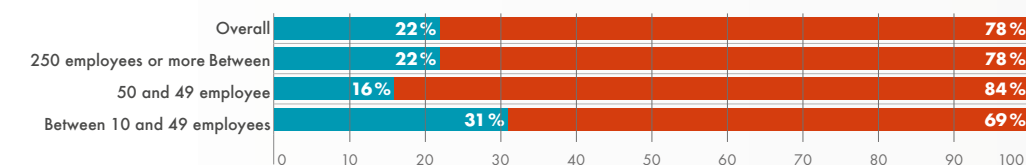


source: INSEE, TIC 2018, 2016 surveys of companies with 10 or more employees.

DISTRIBUTION OF ELECTRONIC B2B SALES

Sales via e-commerce web-sites represent 22% of all electronic B2B sales, 31% for businesses with between 10 and 49 employees.

As a percentage of the total of electronic B2B sales



source: INSEE, TIC 2018 survey, companies with 10 or more employees.



fédération e-commerce et vente à distance

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This data is drawn from surveys completed by the Fevad and its partners. For more information see www.fevad.com
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