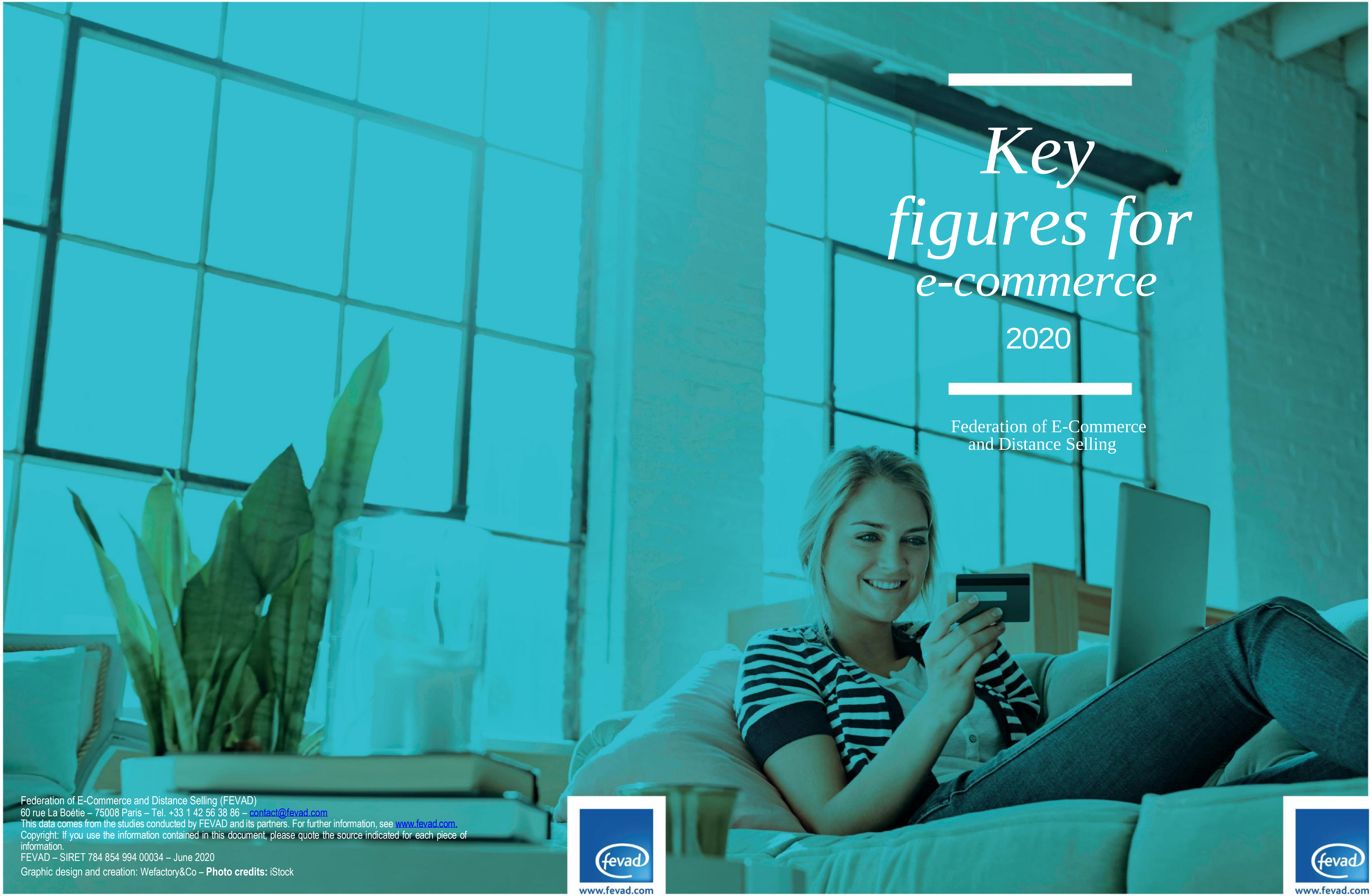


# *Key figures for e-commerce*

2020

Federation of E-Commerce and Distance Selling

Federation of E-Commerce and Distance Selling (FEVAD)
60 rue La Boétie – 75008 Paris – Tel. +33 1 42 56 38 86 – contact@fevad.com
This data comes from the studies conducted by FEVAD and its partners. For further information, see www.fevad.com.

FEVAD – SIRET 784 854 994 00034 – June 2020
Graphic design and creation: Wefactory&Co – **Photo credits:** iStock

www.fevad.com

www.fevad.com

# *E-commerce involving individuals*

E-commerce involving individuals is as dynamic as ever, driven by the digital transformation of companies, the development of new services and the growth of goods from the circular economy. This growth is also benefiting from the increase in the use of smartphones, which allow consumers to plan, order and track their purchases on the move.

## TURNOVER FROM E-COMMERCE

Online sales of goods and services combined exceeded 100 billion in 2019, with an overall increase of 11.6% year on year. Goods sales accounted for 44% of total income, compared to 56% for the sale of services. Over the past four years, e-commerce has grown by 13% a year on average.

In addition to the continued development of online sales, e-commerce is also benefiting from a further increase in the number of buyers and their growing use of mobile phones. On the leading websites, mobile orders increased by 4% over the year and now account for nearly 40% of total revenue.

**€103.4** billion

**11.6%** increase over 2018

Source: FEVAD iCE.

**1.7** billion

online **transactions** in 2019

**15.7%** increase over 2018

Source: FEVAD iCE.

### E-COMMERCE TURNOVER (in billions of euros)

| | |
|---|---|
| 2015 | 62.9 |
| 2016 | 71.5 |
| 2017 | 81.7 |
| 2018 | 92.6 |
| 2019 | 103.4 |

Source: FEVAD iCE.

## E-BUYERS, M-BUYERS

Online purchases from mobile phones attracted many consumers in 2019: an increase of 3.1 million, or 23.7% year on year. Three out of 10 web users now buy from their mobile phone, with the youngest (aged 25-34) and women the biggest users.

**89%**

of e-buyers say that **e-commerce is positive overall** for consumers

Source: FEVAD/Médiamétrie survey, January 2020.

### PROFILE OF E-BUYERS
% of buyers by target web users

| | |
|---|---|
| Men | 82.0% |
| Women | 81.5% |
| 11-14 years of age | 25.3% |
| 15-24 years of age | 81.4% |
| 25-34 years of age | 89.8% |
| 35-49 years of age | 86.5% |
| 50-64 years of age | 80.6% |
| 65 years of age and above | 72.0% |
| Upper socio-professional category | 92.4% |
| Lower socio-professional category | 81.7% |
| Non-working | 74.6% |
| Paris and Paris region | 82.1% |
| Countryside | 81.6% |
| Average | 78.3% |

Source: Médiamétrie – Monitoring Centre of Internet Uses (OUI) Q1 2020.

Eight out of 10 web users overall buy online, all devices combined (an increase of 800,000 year on year), with a relatively homogenous rate of e-buyers across the country: 72.0% in Bourgogne-Franche-Comté rising to 83.6% in Occitanie.

**40** million

French people buy online, constituting 78.3% of web users

Source: Médiamétrie – Monitoring Centre of Internet Uses (OUI) Q1 2020.

**16.3** million French people made purchases from their mobile phone in the past 12 months

Source: Médiamétrie – Monitoring Centre of Internet Uses (OUI) Q4 2019.

### REGIONAL PENETRATION
% of buyers by target web users

| | |
|---|---|
| Occitanie | 83.6% |
| Provence-Alpes-Côte d'Azur | 81.5% |
| Pays de la Loire | 80.8% |
| Normandy | 80.3% |
| Auvergne-Rhône-Alpes | 80.1% |
| Centre-Val de Loire | 78.8% |
| Brittany | 77.8% |
| Nouvelle-Aquitaine | 77.3% |
| Hauts-de-France | 77.0% |
| Île-de-France | 76.3% |
| Grand Est | 75.8% |
| Corsica | 72.1% |
| Bourgogne-Franche-Comté | 72.0% |

Source: Médiamétrie – Monitoring Centre of Internet Uses (OUI) Q4 2019.

**9.8%**

of retail commerce*

(*) Except for fuel, pharmacies, medical and orthopaedic devices

Source: FEVAD with INSEE.

## SHARES OF E-COMMERCE IN COMMERCE

Sales of online goods accounted for just under 10% of total retail trade on average in 2019. The market share of e-commerce is increasing by around 0.7% a year, specifically thanks to the development of online sales by retail chains.

### MARKET SHARE AND TURNOVER OF E-COMMERCE BY SECTOR

| | 2019 turnover in billions of euros | Market share 2019 |
|---|---|---|
| Tourism | 21 | 46% |
| New physical and cultural goods | NA | 19% |
| High-tech appliances | 3.3 | 25.9% |
| Household appliances | 1.9 | 20.4% |
| Clothing | 4.0 | 14.7% |
| Furniture | 0.97 | 7.3% |
| Consumer goods | 7.4 | 7.6% |
| of which drive-thru consumer goods | 5.9 | 6.0% |

Sources: Phocuswright/L'Echo Touristique, GfK (Consumer panel for cultural products; retailer panels for household appliances), IFM, Ipea (pure players only), Nielsen Homescan.

## E-COMMERCE & OTHER CHANNELS

E-commerce has little impact on purchases in local shops. For web users, it's more of an alternative to shopping in shopping centres or supermarkets.

If they hadn't ordered the product online, e-buyers think they would most likely have bought it:

| | |
|---|---|
| In a shopping centre | 42% |
| In a supermarket | 32% |
| In a local shop | 16% |
| In another physical shop or store | 16% |

Source: FEVAD/Médiamétrie survey, October 2019.

## E-COMMERCE AND EMPLOYMENT

E-commerce, including goods and services, has created over 200,000 direct jobs on top of which a significant number of jobs with partners, particularly in transport and logistics. The number of jobs is continuing to increase year after year.

### LEADING WEBSITES

**54%**

of sites increased their staff numbers in 2019

Source: FEVAD/LSA study conducted on leading websites, February 2020.

### VSE/SME

**17%**

of VSE/SME e-merchants recruited at least one employee in 2019

Source: Specific e-merchant profile, VSE-SME, Oxatis/FEVAD/Kedge Business School, January 2020.

### EMPLOYMENT IN SMALL MUNICIPALITIES

**45%**

VSME e-merchants are located in **municipalities with fewer than 10,000 inhabitants.** Half of these businesses run their business in the town centre.

**25%**

of VSME e-merchants are located in **municipalities with fewer than 5,000 inhabitants.**

Source: Specific e-merchant profile, VSE-SME, Oxatis/FEVAD/Kedge Business School, January 2020.

**200,000 more jobs in 2019**

Source: FEVAD estimate (from Insee-Esane).

## E-COMMERCE BENEFITTING VSME AND LOCAL BUSINESSES

E-commerce is being increasingly used by merchants and tradesmen. It helps invigorate local areas, in particular by encouraging local business and the omnichannel dynamics favoured by consumers.

**57%**

of VSME e-merchants also sell **in traditional stores or *through* their distribution networks:**

**71%**

have an **own-name store**

**47%**

have their **store in the centre of town**

**14% increase**

E-commerce sites enable a 14% increase in store sales for traders who use both channels simultaneously.

Source: Specific e-merchant profile, VSE-SME, Oxatis/FEVAD/Kedge Business School, January 2020.

**75%**

of e-buy think local shops should allow customers to buy online

Source: FEVAD/Médiamétrie survey, May 2020.

E-commerce **lets buyers buy easily from SMEs**

for **75%**

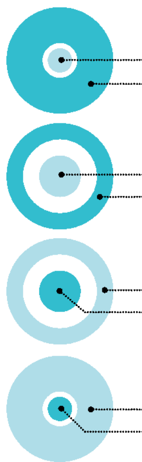
of e-buyers

Source: FEVAD/Médiamétrie survey, January 2020.

# *E-commerce involving individuals*

## DISTRIBUTION OF STAKEHOLDERS

### DISTRIBUTION OF E-COMMERCE ACTIVITY BY SIZE OF E-MERCHANTS



Under €100,000 a year
1.5% of market turnover
71.1% of sites

€100,000 to €1 million a year
7.1% of market turnover
21.8% of sites

€1 to 10 million a year
17.8% of market turnover
6.0% of sites

Over €10 million a year
73.6% of market turnover
1.1% of sites

Turnover made independently or on behalf of third parties.
Source: FEVAD iCE.

### TOP 5 PENETRATION RATES OF E-COMMERCE SITES

The audience of the 15 most visited e-commerce sites and apps in France is continuing to grow: 71% of French people in Q4 2019 compared to 67% in Q4 2018 according to the FEVAD – Médiamétrie//NetRatings survey that we publish quarterly. The sites with the most customers in 2019 were:

AMAZON (26,121 000 customers)
1 53.7%

FNAC (13,115 000 customers)
2 27.0%

CDISCOUNT (8,835,000 customers)
3 18.2%

VEEPEE (6,616,000 customers)
4 13.6%

E.LECLERC (5,404,000 customers)
5 11.1%

Coverage as % of web users who reported having purchased all categories of products (excluding travel).
Source: Médiamétrie/NetRatings Reporting survey of shopping sites over the past 12 months, September 2019.).

### PROFITABILITY OF LEADING WEBSITES

Websites with over 100 million euros annually

73% profitable

12% broken even

Sites with under 10 million euros annually

50% profitable

34% broken even

Source: FEVAD/LSA survey conducted on leading websites – February 2020.

200,650
active merchant sites
Source: FEVAD iCE – Q1 2020.

## MARKETPLACES

The development of marketplaces is a source of additional turnover for many merchants and e-merchants.

### LEADING WEBSITES

35%
sell on marketplaces

23%
perform a marketplace activity

Source: FEVAD/LSA survey, February 2020.

### VSE / SME

32%
of VSE/SME sell on marketplaces

For 63%
of them, this channel accounts for over 10% of turnover

Source: Specific e-merchant profile, VSE-SME, Oxatis/FEVAD/Kedge Business School, January 2020.

### BUSINESS VOLUME OF MARKETPLACES

15%
of the business volume of the iCE panel, product sales, FEVAD
14% increase over 2018

Source: FEVAD iCE.

€59
Average transaction amount
3.6% decrease compared to 2018
Source: FEVAD iCE.

## FREQUENCY OF PURCHASES, GOODS AND SERVICES BOUGHT

98%
of e-buyers **were happy with their online purchases** in the past 12 months
Source: FEVAD/Médiamétrie survey, October 2019.

3.5
online transactions on average a month and
**€2,577** per buyer over the year
Source: FEVAD – Médiamétrie//NetRatings.

48.5%
of web users made a purchase in the past month
Source: Médiamétrie – Monitoring Centre of Internet Uses (OUI) Q4 2019.

### GOODS AND SERVICES BOUGHT ONLINE
In the past 12 months
As % of e-buyers

| | |
|---|---|
| Fashion-clothing | 51% |
| Cultural goods | 41% |
| Toys and games | 38% |
| Travel/tourism | 37% |
| Shoes | 36% |
| Technical/household goods | 35% |
| Health and beauty | 33% |
| Clothing and household linen | 26% |
| Household goods and decorations | 25% |

Source: FEVAD/Médiamétrie survey, January 2020.

## E-COMMERCE & THE ENVIRONMENT

Every year, e-commerce significantly reduces the number of kilometres travelled by motor vehicles by limiting the number of car journeys made by consumers.

E-buyers who would have travelled to buy products usually ordered online would have done so:

| | |
|---|---|
| by car or motorbike | 71% |
| by public transport | 16% |
| on foot | 9% |
| by bike | 3% |

Source: FEVAD/Médiamétrie survey, October 2019.

At the same time, awareness and expectations of eco-friendly consumption are continuing to gain ground among e-buyers.

70%
prefer sites that promote a **responsible approach**

71%
**bundle orders** to limit deliveries

77%
**Recycle** order **packaging,** and
**45%** reuse it

The circular economy and short circuits are the "in" thing.

67%
of e-buyers **can find** responsibly traded products **more easily** thanks to the Internet
Source: FEVAD/Médiamétrie survey, September 2019.

### CONSIDERATION OF THE ENVIRONMENTAL EXPECTATIONS of e-merchants

Consideration of eco-responsible approaches in the choice of partners
45%
35%

Implementation of an internal plan to reduce the environmental footprint of your business
40%
40%

Already in place
Under way

Source: FEVAD/LSA survey conducted on leading websites – February 2020.

## MOBILITY

Mobile phones, both sales channels for goods/services and web-to-store facilitators, are a vector of omnichannel dynamics.

### TYPES OF PURCHASES ON MOBILES

| | |
|---|---|
| Goods | 64% |
| Services (tickets to cultural events and trips etc.) | 41% |
| Apps | 18% |
| Online subscriptions to cultural goods | 17% |

Source: FEVAD/Médiamétrie survey – October 2019, as % of mobile e-buyers.

### MOBILES, PURCHASE FACILITATORS

Useful in terms of planning and making purchases
89% of mobile e-buyers

Useful externally in terms of finding a product/point of sale
87% of mobile e-buyers

Source: FEVAD/Médiamétrie survey – January 2020.

49%
of mobile e-buyers buy on the Internet at least once a month from their mobile
Source: FEVAD/Médiamétrie survey, October 2019.

# E-commerce involving individuals

## PAYMENT

Bank cards are the main method of online payments, with a growing proportion of payment solutions in three or four instalments. Another trend is the increase in e-wallet payments.

### PAYMENT METHODS USED

As % e-commerce turnover from goods sales in 2018.

| | |
|---|---|
| Bank cards | 80.1% |
| E-wallets | 11.5% |
| Cons. credits | 3.9% |
| Transfers/direct debits | 0.9% |
| Other payment methods (private cards, cheques, gift vouchers, cash on delivery, payments in store, branches, money orders and cheque by post etc.) | 3.7% |

Source: FEVAD survey – January 2019.

## DELIVERY

**Companies are continuing to diversify delivery options and e-buyers are taking advantage of the full range of services on offer: 85% have their orders delivered without having to travel, and 74% go to points of sale to collect their orders. Click-and-collect is becoming widespread, and is being offered by more companies and local shops for new categories of goods.**

37%

of e-buyers have subscribed to at least one delivery service

Source: FEVAD/Médiamétrie survey – January 2020.

### DELIVERY METHODS USED

| | |
|---|---|
| Home delivery | 85% |
| Work delivery | 3% |
| Pick up and go (*Points Relais*) | 68% |
| Click-and-collect | 28% |
| E-booking | 9% |
| Lockers | 3% |

As % of e-buyers – Source FEVAD/Médiamétrie survey – January 2020.

## CROSS-BORDER

French e-buyers are proportionally more likely to buy abroad than the average European e-buyer.

### INTERNATIONAL BUYERS

% of web user purchasing online from foreign sellers (in or outside the EU)

| | |
|---|---|
| France | 36% |
| EU, 28 countries | 32% |

% of web user purchasing online from foreign EU sellers

| | |
|---|---|
| France | 27% |
| EU, 28 countries | 25% |

% of web user purchasing online from foreign sellers outside the EU

| | |
|---|---|
| France | 22% |
| EU, 28 countries | 19% |

Source: Eurostat 2019.

### INTERNATIONAL SELLERS

61%

of leading websites sell internationally

27%

through a presence on international marketplaces

| | |
|---|---|
| Sites of over €100 million a year | 82% |
| Sites of €10 to 100 million a year | 65% |
| Sites of under €10 million a year | 40% |
| Average | 61% |

Source: FEVAD/LSA survey conducted on leading websites – February 2020.

Top 5 countries where FEVAD member companies are present, as % of sites selling internationally

| | | |
|---|---|---|
| 1 | Belgium | 83% |
| 2 | Spain | 73% |
| 3 | Italy | 63% |
| 4 | Germany | 60% |
| 5 | UK | 42% |

Source: FEVAD/LSA survey conducted on leading websites – February 2020.

## E-COMMERCE IN EUROPE AND GLOBALLY

Europe has a population of 578 million people, 87% of whom have access to the Internet, and 67% of whom buy on the Internet.

France is the second biggest e-commerce market in Europe after the UK.

### E-COMMERCE TURNOVER IN EUROPE

€636 billion in 2019

14.2% increase over 2018

Average amount per buyer: €1,464

Top 5 European countries

| | | E-commerce turnover in 2019 in billions of € | Rate of e-buyers as % of web users |
|---|---|---|---|
| 1 | UK | 200 billion | 91% |
| 2 | France | 103 billion | 77% |
| 3 | Germany | 94 billion | 84% |
| 4 | Spain | 53 billion | 64% |
| 5 | Italy | 32 billion | 49% |

### E-COMMERCE TURNOVER GLOBALLY

$2,300 billion in 2019

11% increase over 2018

Top 3 countries in the world

| | | |
|---|---|---|
| 1 | China | 723 |
| 2 | USA | 547 |
| 3 | UK | 200 |

E-commerce turnover in 2019 in billions of $

### AVERAGE AMOUNT PER E-BUYER in billions of $

| | |
|---|---|
| North America | 1,791 |
| Europe | 1,715 |
| Middle East | 1,123 |
| Asia & Oceania | 978 |
| South America | 445 |
| Africa | 205 |

Source: Ecommerce Europe.

# E-commerce involving professionals

Turnover from inter-company e-commerce now exceeds 150 billion euros, i.e. 130 billion euros for companies with over 10 employees and over 15 billion euros for those with under 10 employees (INSEE survey, ICT-VSE 2016). With a growth rate of around 15% a year over the past three years, B2B sales *via* websites represent an average of 4% of total company turnover (the same as the European average), with 2% for companies with under 250 employees. Overall, EDI and sales *via* e-commerce sites account for 19% of the total turnover of companies with over 10 employees.

## EUROPE – ELECTRONIC B2B SALES

### PERCENTAGE OF ELECTRONIC B2B SALES

| | B2B sales *via* websites | B2B sales *via* EDI |
|---|---|---|
| UK | 5% | 10% |
| EU (28 countries) | 4% | 11% |
| France | 4% | 15% |
| Spain | 4% | 11% |
| Germany | 3% | 10% |
| Italy | 2% | 8% |

Source: Eurostat 2019, companies of 10 employees or more, as % of company turnover.

## FRANCE – VALUE OF ELECTRONIC B2B SALES

| | B2B sales *via* websites | B2B sales *via* EDI |
|---|---|---|
| 2018 | 130 | 451 |
| 2017 | 126 | 438 |
| 2015 | 85 | 338 |

Source: INSEE, ICT survey 2019, 2018, 2016, companies of 10 employees or more, in billions of euros before tax.

>€150

billion made on B2B websites

## FRANCE – PERCENTAGE OF ELECTRONIC B2B SALES IN TOTAL COMPANY TURNOVER

| | B2B sales *via* websites | B2B sales *via* EDI |
|---|---|---|
| 2018 | 4% | 15% |
| 2015 | 3% | 12% |
| 2011 | 2% | 10% |
| 2007 | 2% | 9% |

Source: INSEE, ICT survey 2019, 2016, 2012 , 2008, companies of 10 employees or more, as % of total company turnover before tax

### PERCENTAGE ACCORDING TO SECTOR

| | B2B sales *via* websites | B2B sales *via* EDI |
|---|---|---|
| Total | 4% | 15% |
| Industry and construction | 4% | 21% |
| Commerce | 4% | 13% |
| Services | 5% | 6% |

Source: INSEE, ICT survey 2019, companies of 10 employees or more, as % of total company turnover before tax

### PERCENTAGE ACCORDING TO SIZE

| | B2B sales *via* websites | B2B sales *via* EDI |
|---|---|---|
| Total | 4% | 15% |
| 10 to 19 employees | 2% | 3% |
| 20 to 49 employees | 2% | 5% |
| 50 to 249 employees | 2% | 11% |
| 250 employees or more | 6% | 20% |

Source: INSEE, ICT survey 2019, companies of 10 employees or more, as % of total company turnover before tax