ECOMMERCE MEETS FOOD&BEVERAGE

A DRILL-DOWN ANALYSIS BASED ON E^{+}DBS 2017
(THE ANNUAL DIGITAL BEHAVIOUR STUDY BY CONTACTLAB)

February 2018

contactlab

Contactlab provides the leading **engagement marketing platform for commerce-focused companies and fashion & luxury brands** to develop successfully digital communication programs that enable personalized marketing to unlock demand and build lasting customer preferences. Founded in 1998, ContactLab is led by its founder Massimo Fubini, an internet industry veteran and opinion leader in the marketing field since 1995.

Thanks to our **own enabling PaaS technology** and to the experience of our navigated professionals, **we enable brands** to achieve a deeper understanding of customers, to deliver uniquely relevant messages at every touchpoint of the customer journey and to measure performances with real-time dashboards that display all the relevant data. Our enterprise-grade platform is built with the highest **security level**, **reliability**, **management**, **scalability**.

Our solutions enable brands to gain insights into the context of each customer and **deepen the retail experience by delivering highly individualized digital contact plans** across channels based on events, preferences and product lifecycle.

Today, we work with more than **1000 clients** in **different industries** across the world and serve **most of the world-class brands in the Luxury and Fashion sectors.**

The **European+ Digital Behavior Study** is a project carried out **by Contactlab** since 2009. E+DBS investigates the **evolution of behaviors of Internet users** measuring the relationship between users and digital channels and outline the ecosystem that encompasses those brands which make eCommerce a strategic lever for their business. The study investigates European and extra-European markets through a representative sample of the regular Internet users aged 16-65.

For further information about Contactlab and our solutions visit www.contactlab.com

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ONLINE TRENDS 2017

- Internet spread in Europe
- The spread of the eCommerce in Europe and Online Spending Index
- Mobile spread in Europe
- Digital indexes
- Cross-border online shopping in Europe
- E^+DBS methodology

CHAPTER 1

Key findings and key numbers

KEY FINDINGS (1/2)

1. **Food & beverage eCommerce is an expanding market whose future growth depends on the fulfillment of unmet demand**
   - the number of online food and beverage shoppers has grown by over 180% since 2014 thanks in part to the general rise in online shoppers
   - however, there is still a significant gap between potential and current demand, probably due to the lack of a wide-spread and appealing offer
   - food eCommerce faces additional barriers compared to generic online shopping, such as issues related to custom limitations and concerns about product quality and freshness
   - to try to satisfy demand, considering implementable actions, Italian food market players can leverage high-quality food products, the country's famous culinary culture, the value of Made in Italy, and logistics that guarantees freshness

2. **Today the online food & beverage segment interests 19% of online shoppers (10% of internet users), i.e. approximately 3.1 mln individuals**
   - the average online annual expenditure for F&B is almost €150 with 1 out of 5 shoppers spending more than €250 per year
   - all this results in an estimated market value of €460 mln

3. **Exploiting all the available online and offline channels is the key to boosting food & beverage**
   - the click & collect formula shows great growth potential; indeed, 24% of internet users say they are extremely or very interested in using C&C to buy food, while just 1% currently use the service
   - 20% of internet users are prospective buyers of F&B via click & collect, totaling an estimated 6.5 mln individuals, an omnichannel demand that could reach 9.8 mln individuals
   - placing orders for food delivery through websites and apps is an additional way for local food eCommerce, that now interests over 60% of online shoppers

KEY FINDINGS (2/2)

4. Online food & beverage shoppers are highly digitalized (in terms of devices used and activities carried out online) and engageable through digital strategies combining direct marketing and social networks
   - 91% of online F&B shoppers subscribe to at least one newsletter and 46% to food, beverage and nutrition products newsletters
   - according to the Digital Opportunity Index, 57% of online F&B shoppers are either committed or open to brands' communication through newsletters, scoring 59.4 points in the DOI (vs. 45.9 for regular internet users)
   - just about every online F&B shopper uses at least one social network and 31% of them click on sponsored posts if they find them interesting
   - moreover, the large majority (68%) of online food & beverage shoppers are highly active on social networks, scoring 32.1 points in the Social Opportunity Index (vs. 21.5 for regular internet users)

KEY NUMBERS

19% of online shoppers **buy food & beverage products on the internet**, totaling **3.1 mln individuals**

+180% **rise in online F&B shoppers** since 2014

61% of online shoppers **place orders on food delivery market places**

€149
average annual online expenditure on F&B

€460 mln
estimated **Italian online F&B market value**

98% of online F&B shoppers are **social network** users

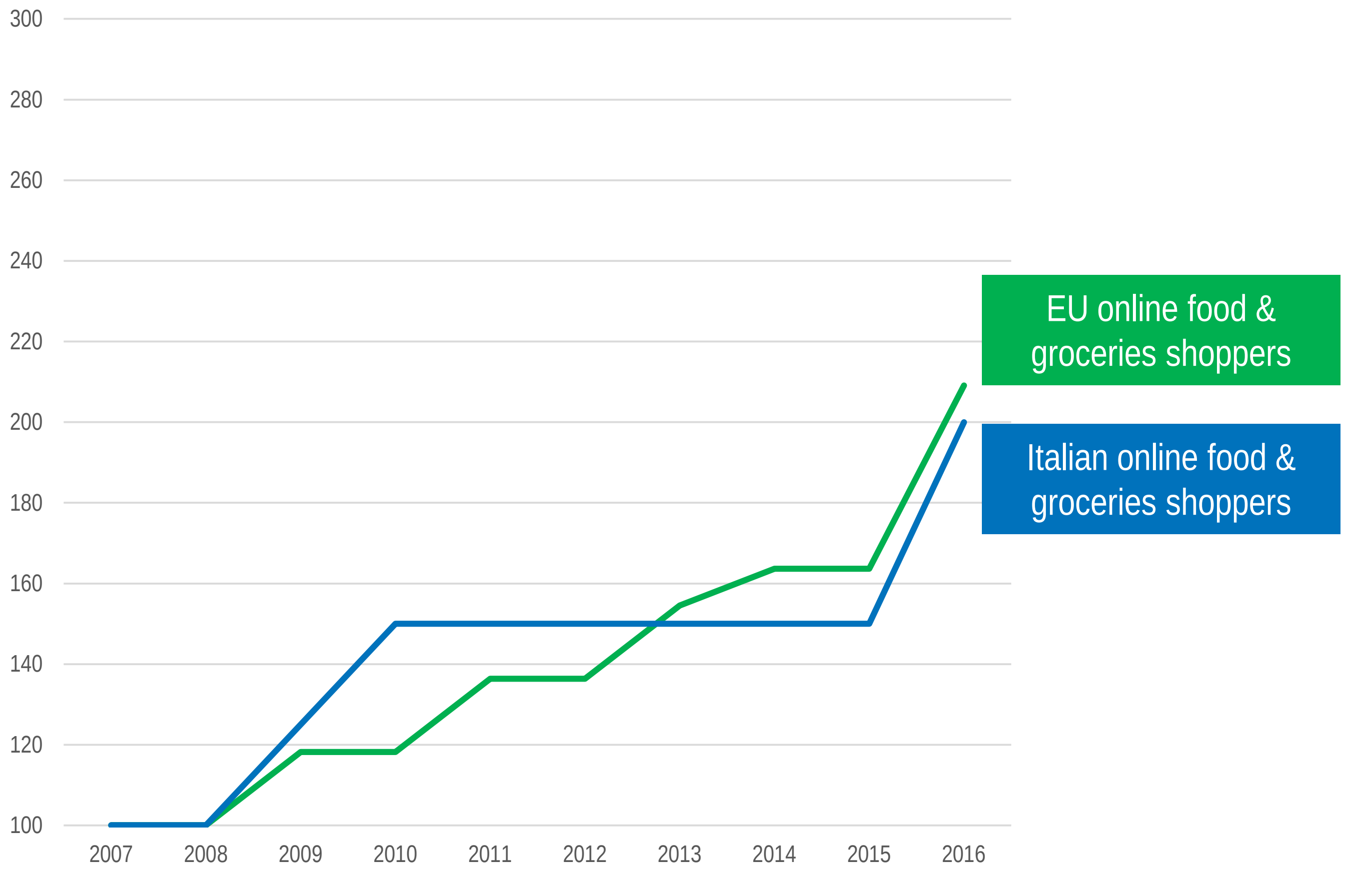
91% of online F&B shoppers subscribe to at least one **newsletter**

CHAPTER 2

Online shopping behaviours, cross-borders and click&collect

ONLINE FOOD & GROCERIES SHOPPERS: 10-YEAR VIEW OF THE EU27

E-COMMERCE GROWTH INDEX OVER THE PAST 10 YEARS AMONG 16-74 Y.O. *



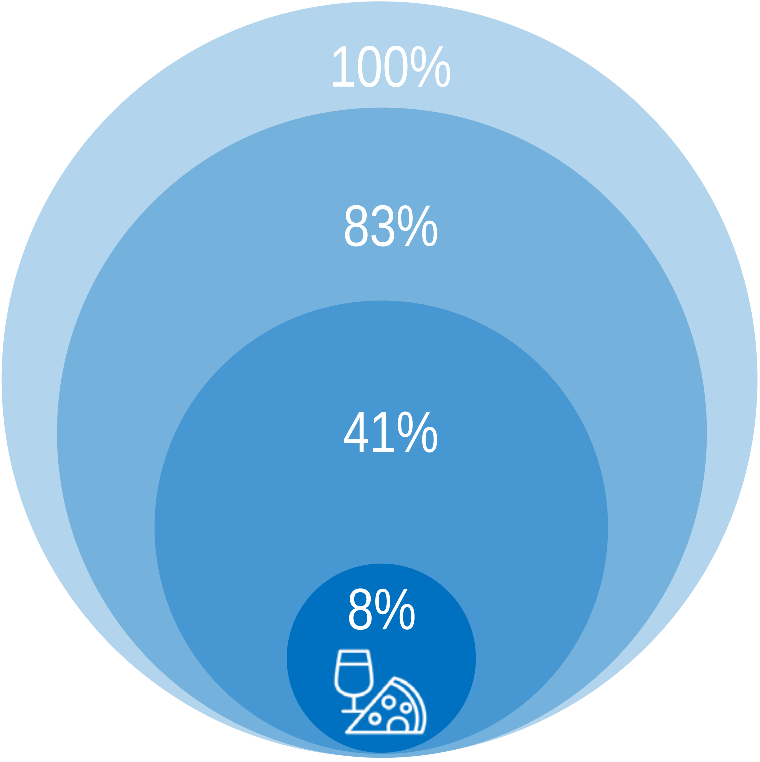
KEY FACTS:

Very significant growth:

- doubled in 10 years
- In Italy flat trend from 2010 to 2015 but sharp increase afterward

*Data source Eurostat, data processed by Contactlab

DISTRIBUTION OF INTERNET AND FOOD & BEVERAGE e-Commerce 16-65 y.o.



In 2017
online food & beverage shoppers represent 8% of the population

19% of online shoppers

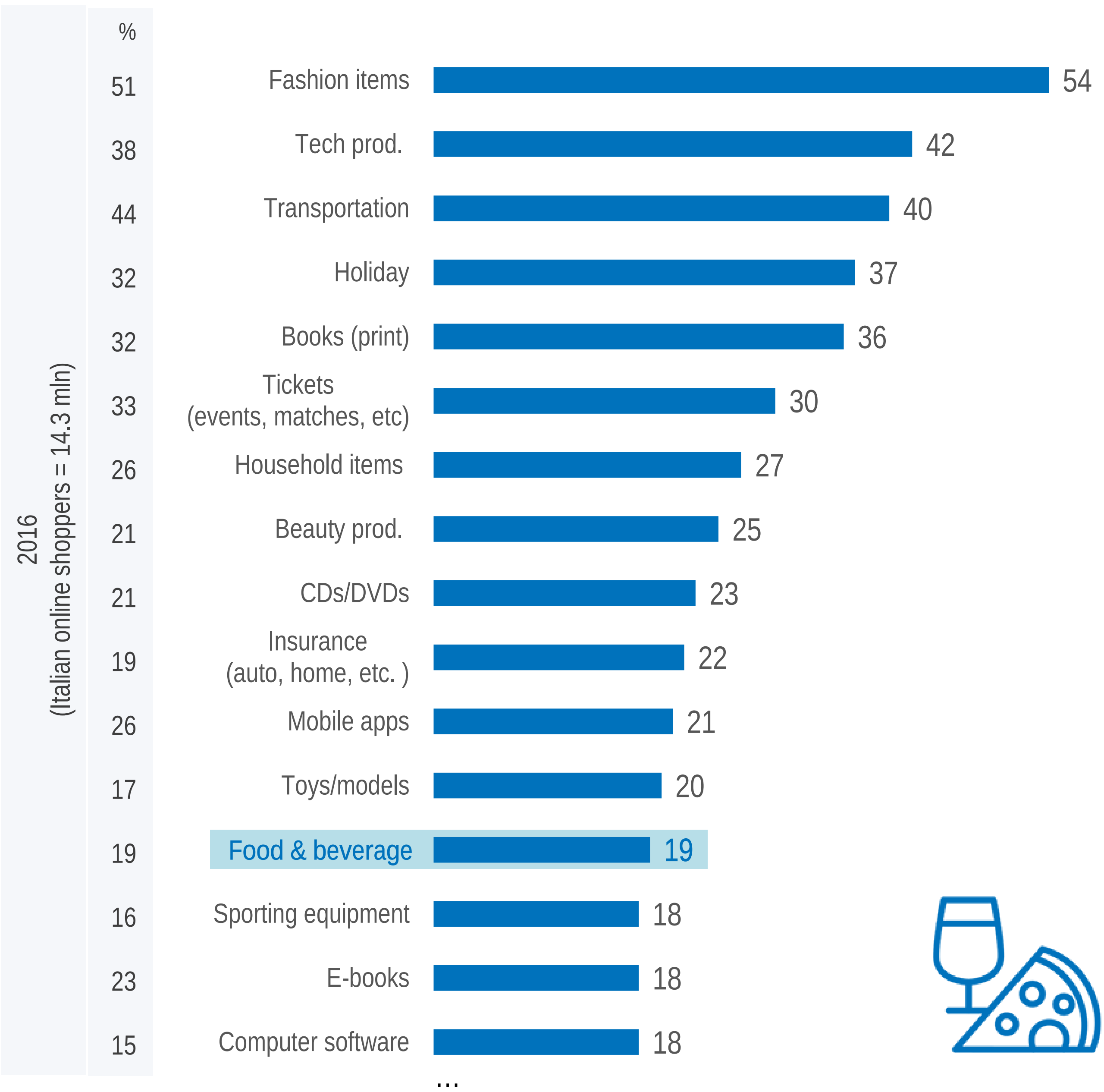
INDIVIDUALS aged 16-65	2017	2016	2015	2014
ITALIAN POPULATION (,000)	39,200	39,400	39,500	38,900
INTERNET USERS (,000) (at least once a week)	32,500	30,500	28,700	26,500
ONLINE SHOPPERS (,000) (at least once in the last 12 m)	16,100	14,300	12,400	10,600

*Data source Eurostat, data processed by Contactlab

WHICH PRODUCTS AND SERVICES DO INTERNET USERS BUY ON THE WEB?

Year 2017

In the last 12 months, have you purchased at least one product or service from one of the following categories of merchandise? %

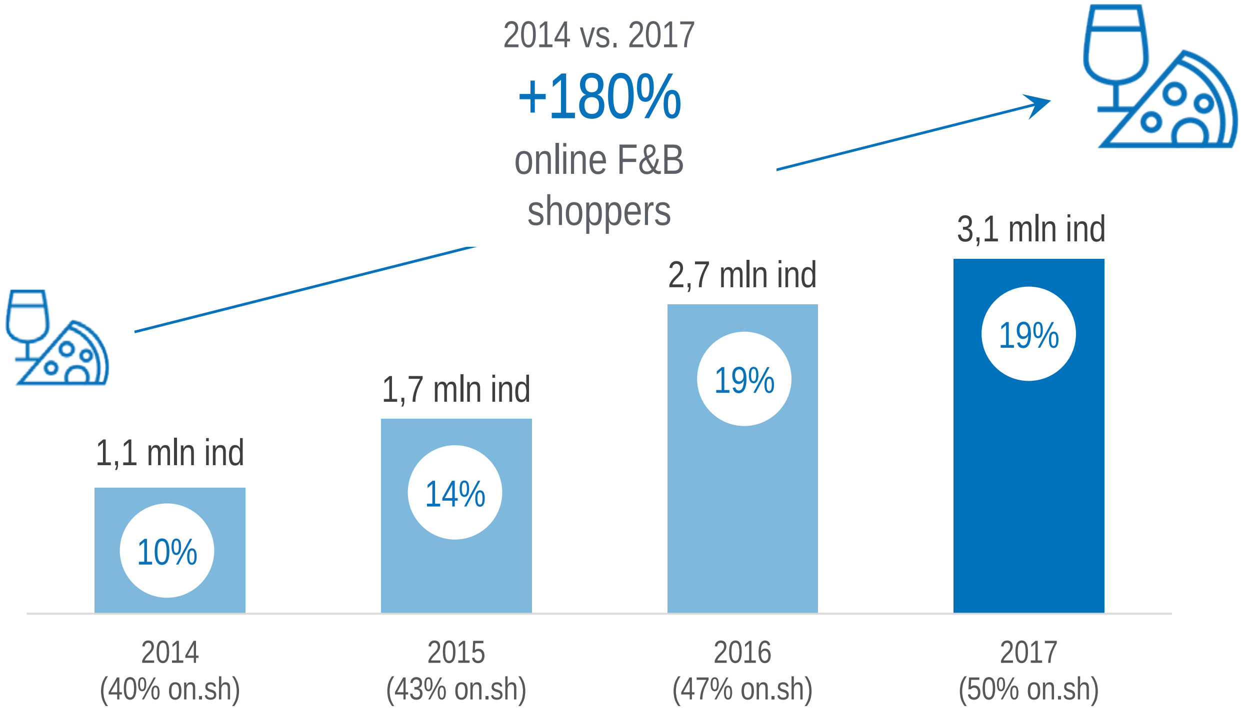


Sample: online shoppers aged 16-65, n=501 (50% of internet users)

19% of online shoppers purchase food & beverage on the internet, totaling

3,100,000 ind.

ONLINE F&B SHOPPERS:
4-YEAR VIEW OF ITALY AND EUROPE

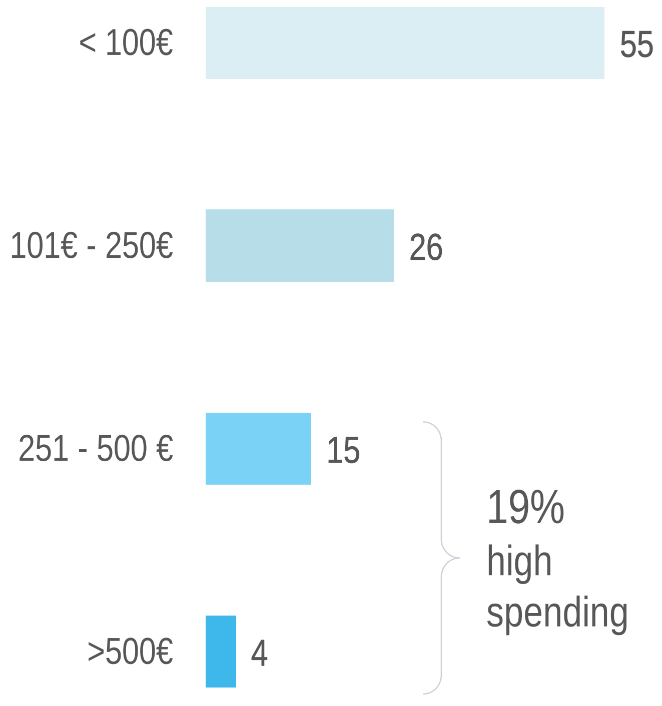


	ONLINE SHOPPERS %	ONLINE FOOD & BEVERAGE SHOPPERS % Sample: online shoppers	INDIVIDUALS (,000)
ITALY	50 (n=501)	19	3,100
UK	93 (n=930)	40	15,300
SPAIN	67 (n=679)	28	5,300
FRANCE	88 (n=884)	24	8,000
GERMANY	92 (n=959)	23	11,100

Sample: online shoppers Italy, each year

HOW MUCH DOES AN ONLINE F&B SHOPPER SPEND YEARLY?
Year 2017

With regards food & beverage, how much have you spent online in the last 12 months?
%



Sample: online F&B shoppers aged 16-65, n=94 (10% of total online shoppers)

€149
the **average online spending on food & beverage per year in 2017**
(vs. €252 on the other 27 categories)

€460 mln
the estimated market value of Italian online F&B

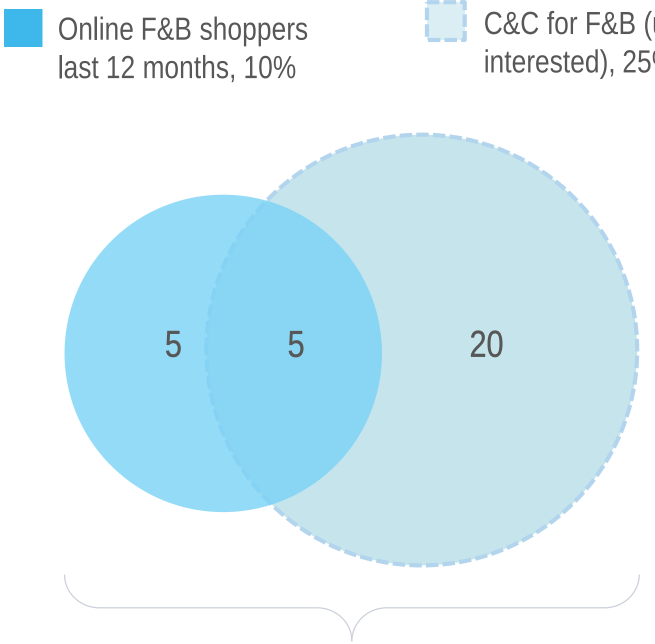
KEY COMPARISONS:

- Europe*: €276 avg. annual online expenditure on F&B
- EXI**, online spending index for F&B: IT=50, UK=137, ES=92, DE=91, FR=91

*Considered countries: Italy, UK, Germany, France, Spain
**EXI = expenditure over previous 12 months by category/avg exp across 27 cat. in 6 EU countries (Italy, UK, Germany, France, Spain and Switzerland) *100

IS CLICK & COLLECT THE WAY TO BOOST ONLINE FOOD & BEVERAGE SHOPPING?
Year 2017

Would you be interested in buying food & beverage with C&C?
(It is now possible to make a purchase with “click & collect”, i.e. buying or ordering goods from a store’s website and collecting them from a local branch)
%



Total omnichannel potential
(e-Commerce + click & collect):
30% of internet users

25% of Italian internet users, are **interested or already using click & collect for food & beverage**
8.1 mln individuals

Total online demand
(online shopping + C&C)
9.8 mln individuals

KEY COMPARISONS:
- In the European landscape, France is the leader with 7% of internet users already purchasing food & beverage with click & collect and 31% interested in the service
- Spain and the UK follow with 38% and 31% of users+interested respectively

Sample: internet users aged 16-65 (n=1,004)

OMNICHANNEL CLICK & COLLECT/E-COMMERCE MARKET POTENTIAL
Year 2017

■ F&B online shoppers
■ Total omnichannel potential

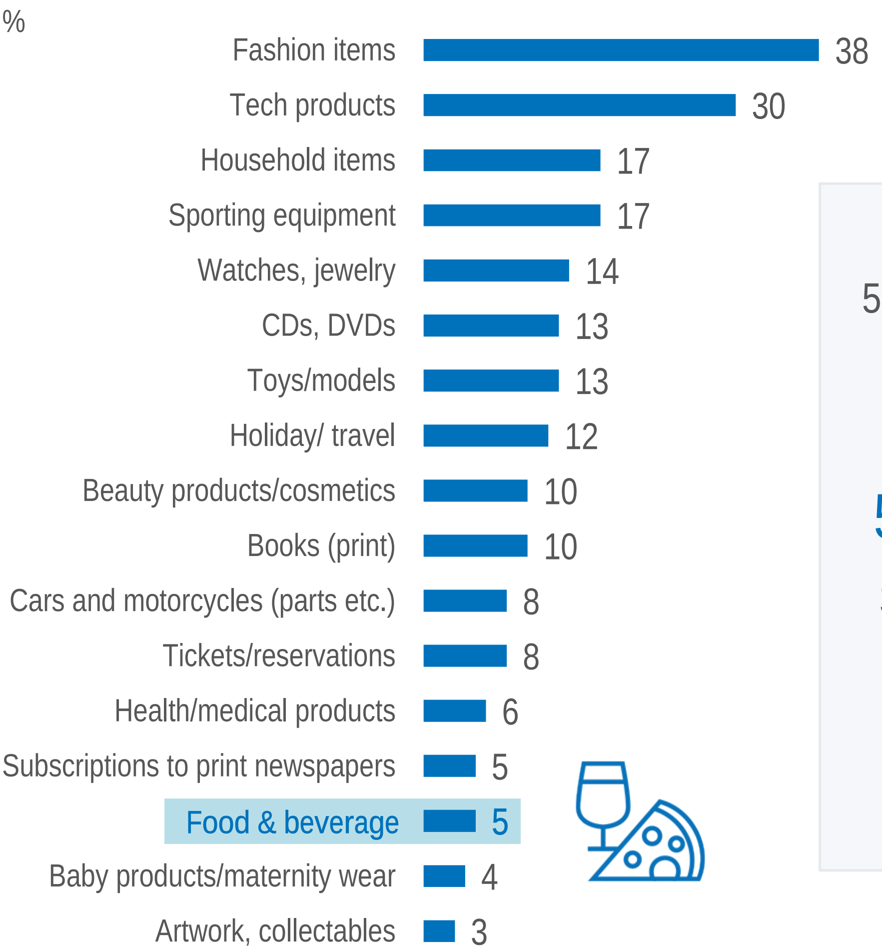
	INTERNET USERS %	F&B online shoppers		Total omnichannel potential	POTENTIAL OF F&B ECOMMERCE WITH C&C
ITALY	83	10	20	30	20% 6,5 mln ind
UK	98	37	19	56	19% 7,8 mln ind
GERMANY	97	21	13	34	13% 6,8 mln ind
FRANCE	90	21	25	46	25% 9,5 mln ind
SPAIN	91	19	28	47	28% 7,8 mln ind

- Meeting the potential demand of C&C among Italian internet users would triple the current demand for food & beverage
- Despite having the highest F&B penetration rate, the UK shows the highest percentage of potential for F&B e-Commerce with C&C with a potential total omnichannel demand covering 56% of internet users

Sample: internet users aged 16-65
*Considered countries: Italy, UK, Germany, France, Spain

HOW MANY PEOPLE BUY F&B PRODUCTS ABROAD VIA E-COMMERCE?
Year 2017

Which of the following products/services have you bought on foreign e-Commerce sites?



56% of Italian online shoppers buy from foreign websites (8.9 mln individuals)

5% of cross-border shoppers buy F&B products abroad (450,000 ind.)

Sample: online cross-border shoppers aged 16-65, n=250 (25% of internet users)

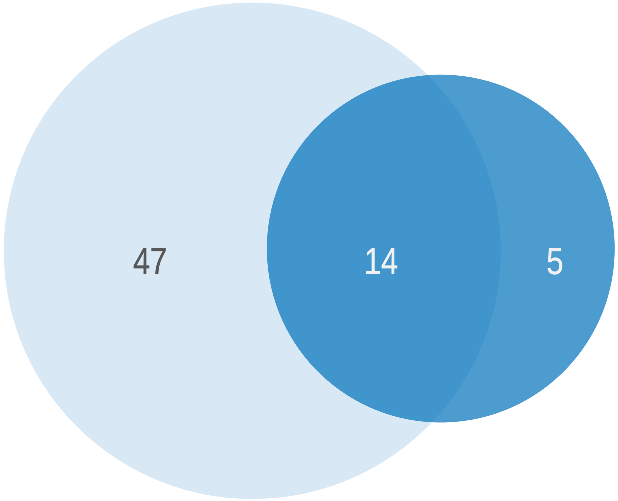
	online shoppers (n= 501, 50%) %	online shoppers (n=930, 93%) %	online shoppers (n=959, 92%) %	online shoppers (n=884, 88%) %	online shoppers (n=679, 67%) %
Cross-border shoppers	56 =100	35 =100	32 =100	47 =100	66 =100
Cross-border F&B shoppers	5	12	7	6	7
% of spending on foreign websites	25	25	19	25	32

APPS AND WEBSITES FOR FOOD DELIVERY: MUCH MORE POPULAR THAN ORDERING F&B THROUGH e-Commerce
Year 2017

Have you ever placed an order online (via app/website) on a food delivery marketplace?
%

online food delivery market place users, 61%

online F&B shoppers over last 12 months, 19%



Sample: online shoppers, n=501 (50% of internet users)

Among online shoppers:
- 66% buy food online (either through e-Commerce or food delivery apps/websites)
- 61% place orders online on food delivery market places
- 14% order food through e-Commerce and food delivery apps/websites

ONLINE FOOD DELIVERY USERS, %

EU COMPARISON:	online shoppers (n= 501,50%) %	online shoppers (n=930, 93%) %	online shoppers (n=959, 92%) %	online shoppers (n=884, 88%) %	online shoppers (n=679,67%) %
Total users	61	71	41	71	78
At least once in the past 4 weeks	33	43	20	38	47

Sample: online shoppers

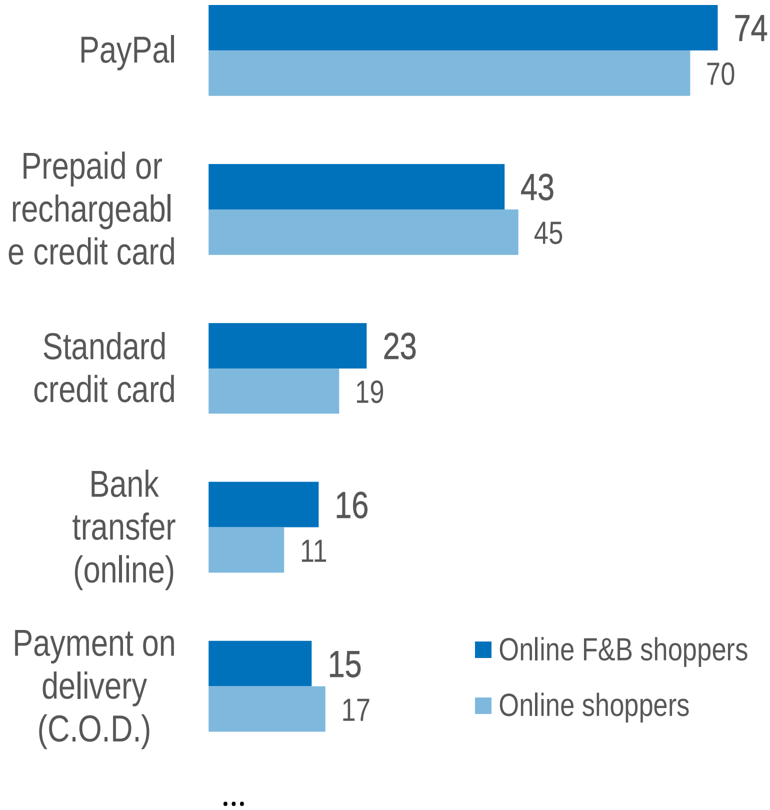
CHAPTER 3

Digital profile (beyond sociodemographic)

ONLINE FOOD & BEVERAGE SHOPPERS' PREFERRED PAYMENT METHODS FOR ONLINE PURCHASES

Year 2017

Which payment methods do you prefer when you shop online?
%



74% of online F&B shoppers **prefer to pay** for their purchases on the web **using PayPal**
(2.3 mln individuals)

2nd place goes to prepaid credit card, preferred by 43% of online shoppers, though remaining uncommon in the rest of Europe

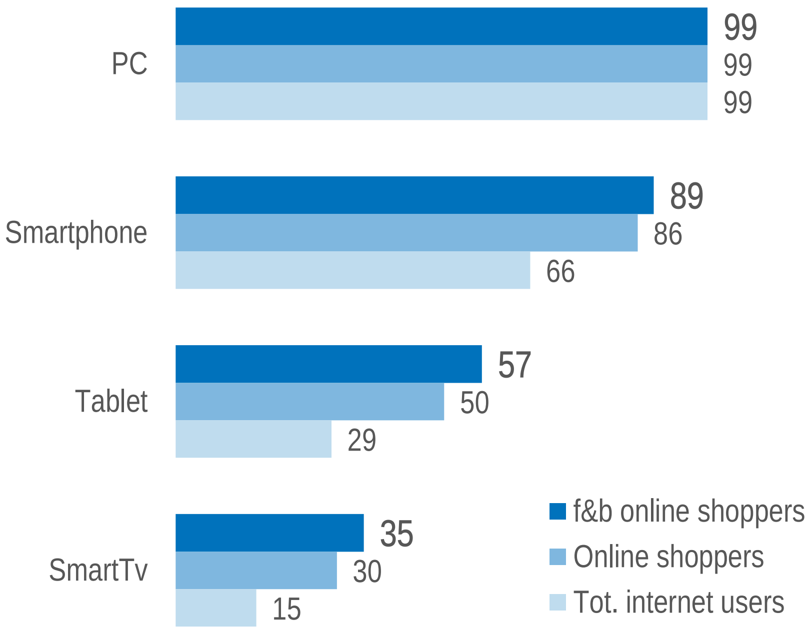
Sample: online F&B shoppers, n=94 (10% of internet users); online shoppers n=501 (50% of internet users)

EU COMPARISON:	online shoppers (n= 94,10%) %	online shoppers (n=375, 37%) %	online shoppers (n=216, 21%) %	online shoppers (n=213, 21%) %	online shoppers (n=192, 19%) %
Paypal	74	72	73	57	78
Prepaid or rechargeable credit card	43	8	12	8	23
Standard credit card	23	48	30	66	35

Sample: online F&B shoppers

ONLINE F&B SHOPPERS ARE MORE TECHNOLOGICALLY ADVANCED THAN AVERAGE ONLINE SHOPPERS & INTERNET USERS Year 2017

In the last 4 weeks, have you connected to the internet for personal reasons using a…
%



Sample: online F&B shoppers, n=94 (10% of internet users); online shoppers, n=501 (50% of internet users); tot. internet users aged 16-65, n=1,004

89% of online F&B shoppers
use a smartphone
to connect to the internet
(2,7 mln individuals)

+32%
avg. penetration of mobile devices for F&B shoppers vs. total internet users

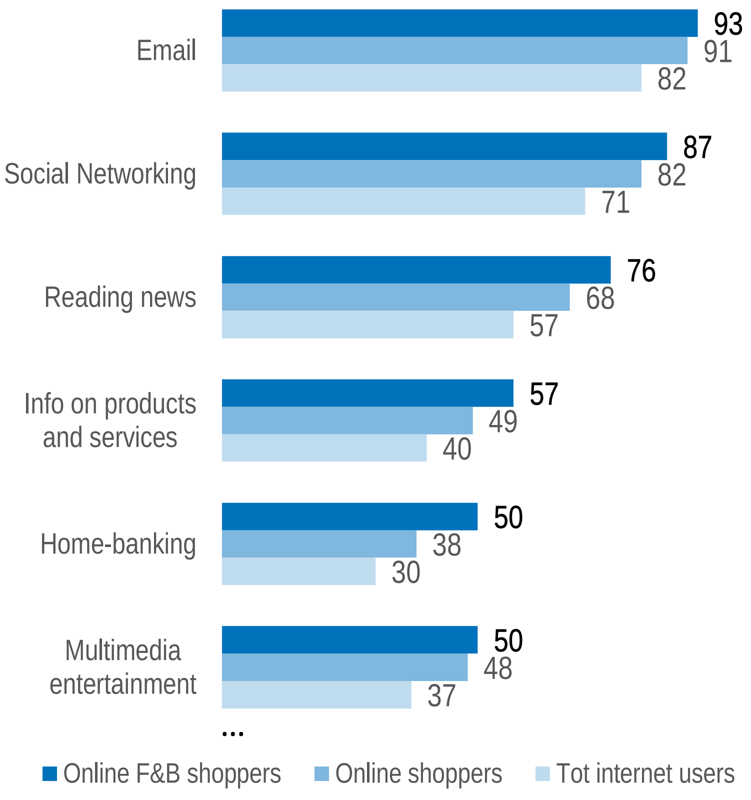
5.9 h
avg. hours spent online daily for personal purposes by online F&B shoppers

	Online F&B shoppers (n=94, 10%) %	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU benchmark (on tot. internet users) 1st %
Tot. mobile users (smartphone OR tablet)	90	88	68	UK = 79
Triple players (PC AND smartph. AND tablet)	56	48	27	UK = 41
Hours spent online (avg. daily)	*5.9*	*5.6*	*5*	IT
Online shopping via smartphone	76	69	40	UK = 54

WEEKLY ONLINE ACTIVITIES: EMAIL AND SOCIAL NETWORKING ARE THE MOST POPULAR
Year 2017

Which of the following activities did you carry out over the last 12 months either with a fixed internet connection or mobile? %

WEEKLY ACTIVITIES



Sample: online F&B shoppers, n=94 (10% of internet users); online shoppers n=501 (50% of internet users); tot internet users aged 16-65, n=1,004

93% of online F&B shoppers **use email on a weekly basis** (2.9 mln individuals)

87% of online F&B shoppers use social networks weekly (2.7 mln individuals)

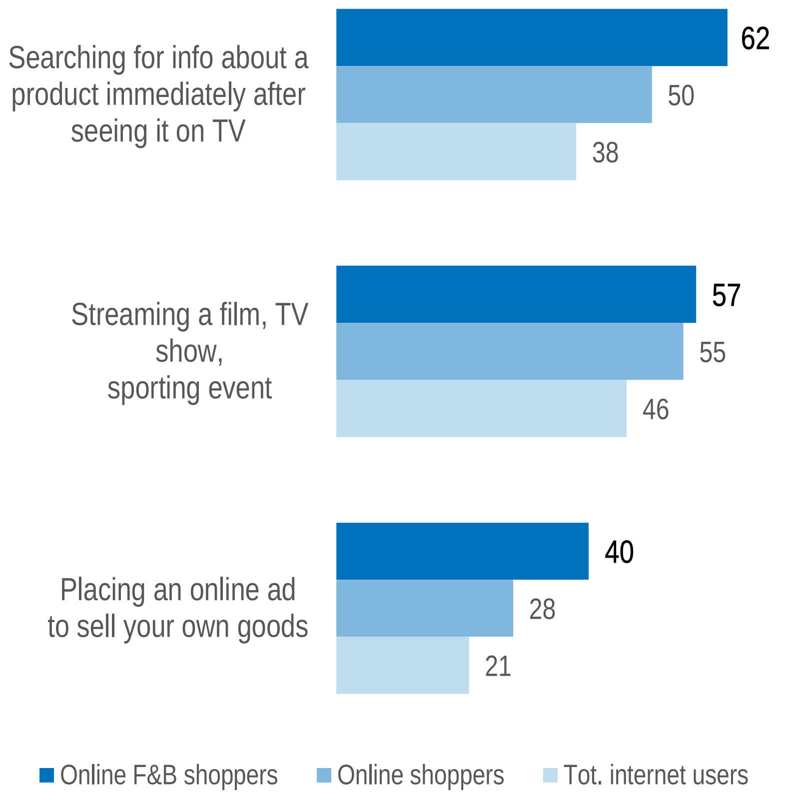
57% of online F&B shoppers search online for information on product/services weekly (1.8 mln individuals)

	Online F&B shoppers (n=94, 10%) %	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU benchmark (on tot internet users) 1st %
Email	93	91	82	ES: 91
Social networking	87	82	71	ES: 82
Looking up info on products or services	57	49	40	ES: 57

DIGITAL PROFILE: OTHER ACTIVITIES CARRIED OUT MONTHLY
Year 2017

Now you will see a list of specific activities that can be performed online. For each one, please indicate if you have done it and, if so, the last time you did.
%

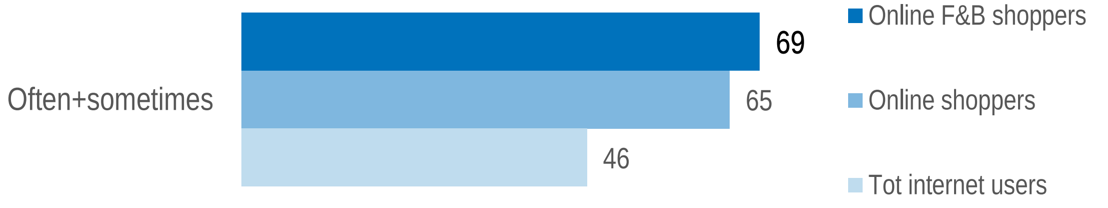
ACTIVITIES DONE AT LEAST ONCE IN THE PAST 4 WEEKS



62% of online F&B shoppers looked up product info after seeing it on TV in the past 4 weeks

69% of online F&B shoppers use their smartphones in-store to compare product price and features

Do you ever connect to the internet with a smartphone when you are in a store to look up product info or compare prices? How often?
%

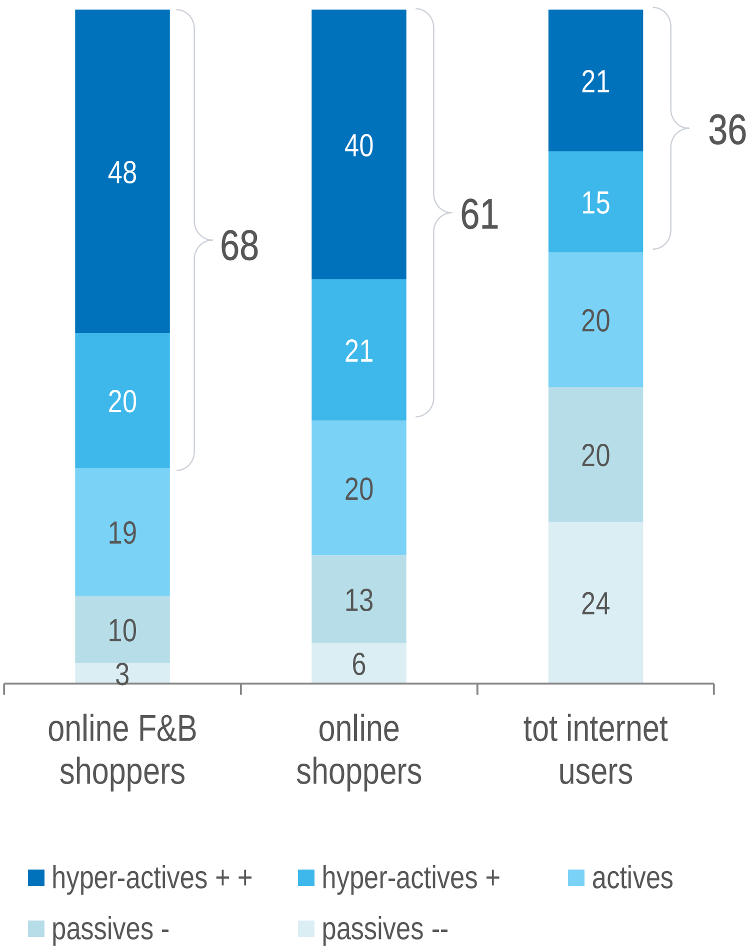


Sample: online F&B shoppers, n=94 (10% of internet users); online shoppers, n=501 (50% of internet users); tot. internet users aged 16-65, n=1,004

ONLINE F&B SHOPPERS DEMONSTRATE A HIGH LEVEL OF DIGITAL INTERACTIVITY
Year 2017

INTERACTIVITY CLUSTERS

%



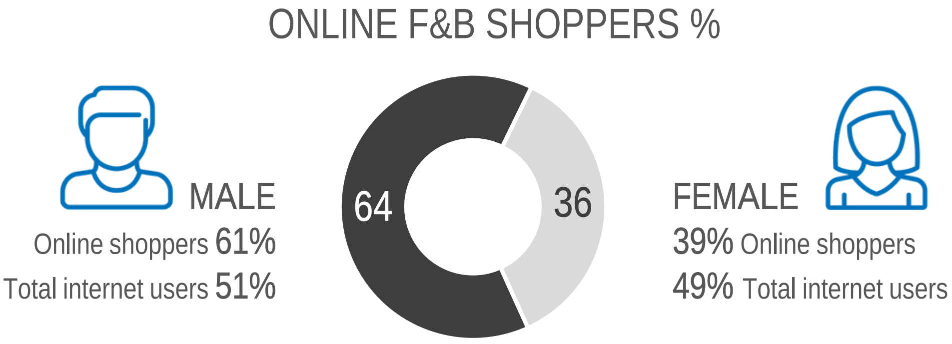
68% of online F&B shoppers are "hyper-active users"

58.7	54.2	41.9	DII "Digital Interactivity Index"

Sample: online F&B shoppers, n=94 (10% of internet users); online shoppers, n=501 (50% of internet users); tot. internet users aged 16-65, n=1,004

	Online F&B shoppers (n=94, 10%) %	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU benchmark (on tot internet users) 1° %
Hyper actives	68	61	36	ES: 57

WHO ARE ONLINE F&B SHOPPERS?



	Online F&B shoppers (n=94, 10%) % U: 3,100,000	Online shoppers (n=501, 50%) % U: 16,100,000	Total internet users (n=1,004) % U:32,500,000
Age			
Under 35	47	46	37
Over 35	53	54	63
Average age	38	37.2	39.9
Education			
Post-graduate (masters, doctorate, PhD)	6	4	2
College or university	30	28	25
Attended university, but did not graduate	20	20	12
High school diploma or less	44	48	61
Profession			
Business owner/freelancer/merchant/manager/ university professor/craftsperson	17	17	19
Clerical worker, teacher	46	44	28
Manual laborer/ shop assistant/ farm owner/ farm laborer	9	8	8
Housewife	6	6	8
Student	14	15	13
Retired	2	2	5
Other	6	8	19

Sample: online shoppers, n=501 (50% of internet users); tot. internet users aged 16-65, n=1.004

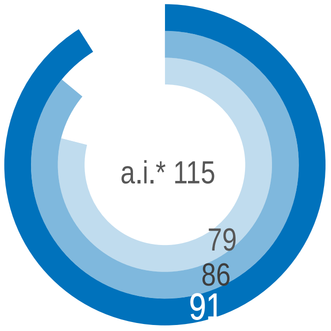
CHAPTER 3

Digital strategy

DIGITAL ENGAGEMENT (DIRECT MARKETING)

NEWSLETTER SUBSCRIBERS

%



91% of online shoppers subscribe to at least one newsletter (2,800,000 ind.)

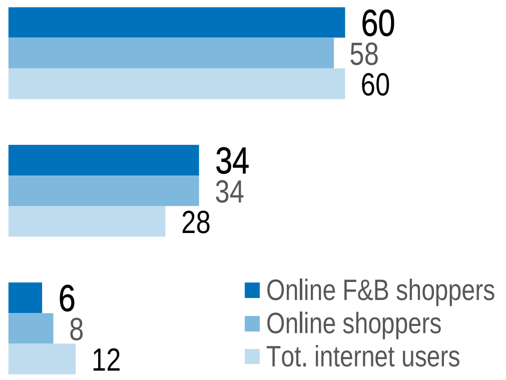
Newsletter topics:

46% of F&B newsletter users subscribe to food, beverage and nutrition products newsletters (1,300,000 ind.)

42% subscribe to cooking and recipes newsletters (1,200,000 ind)

How did you subscribe to these newsletters?

%



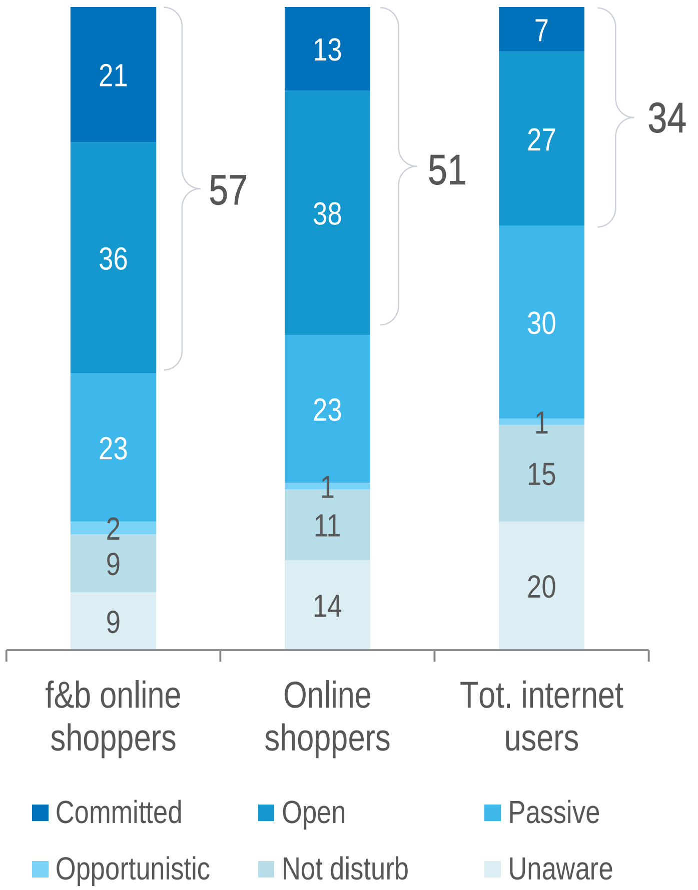
Sample: online F&B shoppers, n=94 (10% of internet users); online shoppers, n=501 (50% of internet users); tot. internet users aged 16-65, n=1,004

THE NEWSLETTER ATTITUDE:	Online F&B shoppers (n=94, 10%) %	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU benchmark (on tot internet users) 1st %
Newsletter subscribers	91 =100	86 =100	79 =100	DE: 82
Newsletters on food, beverage, nutrition products	46	24	27	UK: 29
Willingness to provide more personal information to get most relevant messages (very+somewhat agree)	53	44	37	UK: 44
Trust in newsletter content (very+somewhat)	69	61	60	UK: 71

*Affinity index = % target/ % total *100

OPPORTUNITY TO ENGAGE ONLINE FOOD & BEVERAGE SHOPPERS VIA DIRECT COMMUNICATIONS (NEWSLETTERS)
Year 2017

CLUSTERS BASED ON THE "DIRECT OPPORTUNITY INDEX" *
%



57% of online food & beverage shoppers are **committed or open** to brands' communications through newsletters

59.4	52.8	45.9	DOI "Direct Opportunity Index"

Sample: online F&B shoppers, n=94 (10% of internet users); online shoppers, n=501 (50% of internet users); tot. internet users aged 16-65, n=1,004

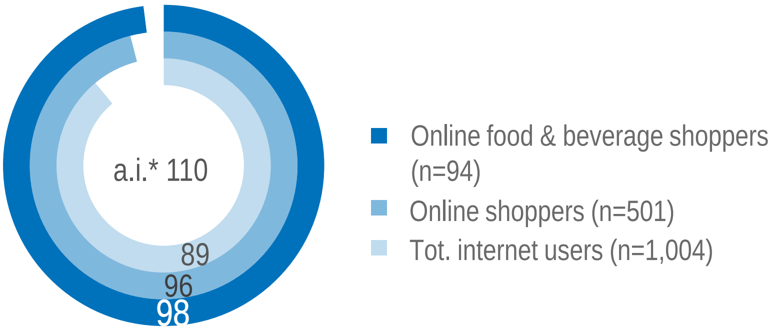
	Online F&B shoppers (n=94, 10%) %	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU benchmark (on tot internet users) 1st , %
Committed+open	57	51	34	UK: 35

*For further information about this analysis, see p. 34 "DIGITAL INDEXES BY E+DBS17"

SOCIAL NETWORKING AND BRAND INFLUENCE

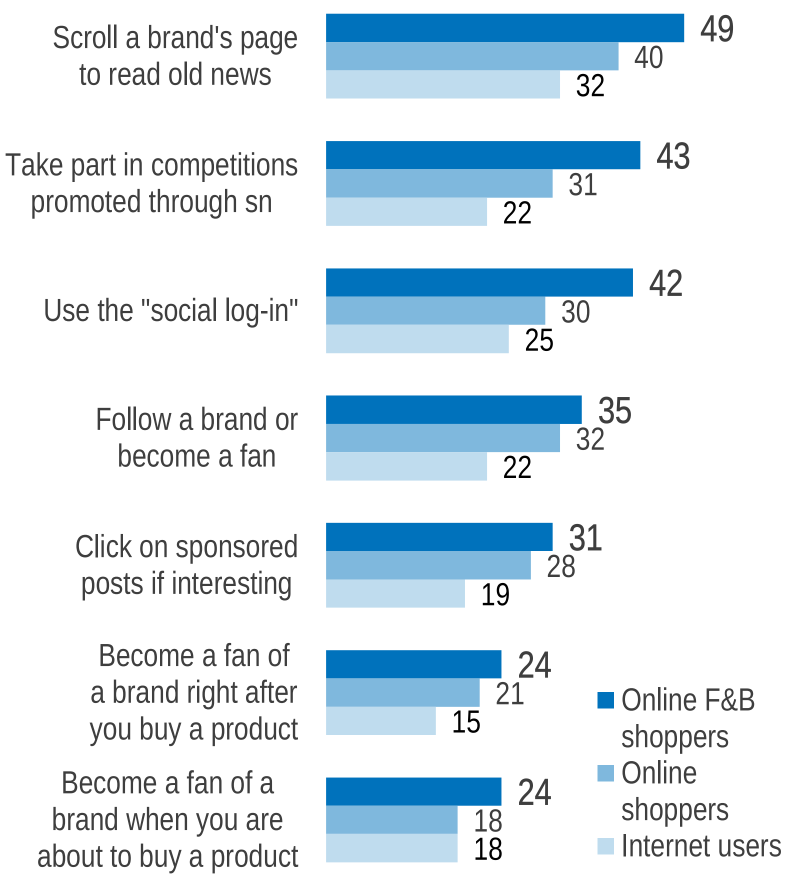
SOCIAL NETWORK USERS

%



Regarding brands on social networks, do you ever perform the following actions?

%



98%
of online F&B shoppers **are social network users**
(3 mln ind.)

35%
of online shoppers who use social networks **follow brands on social media**
(1,1 mln ind.)

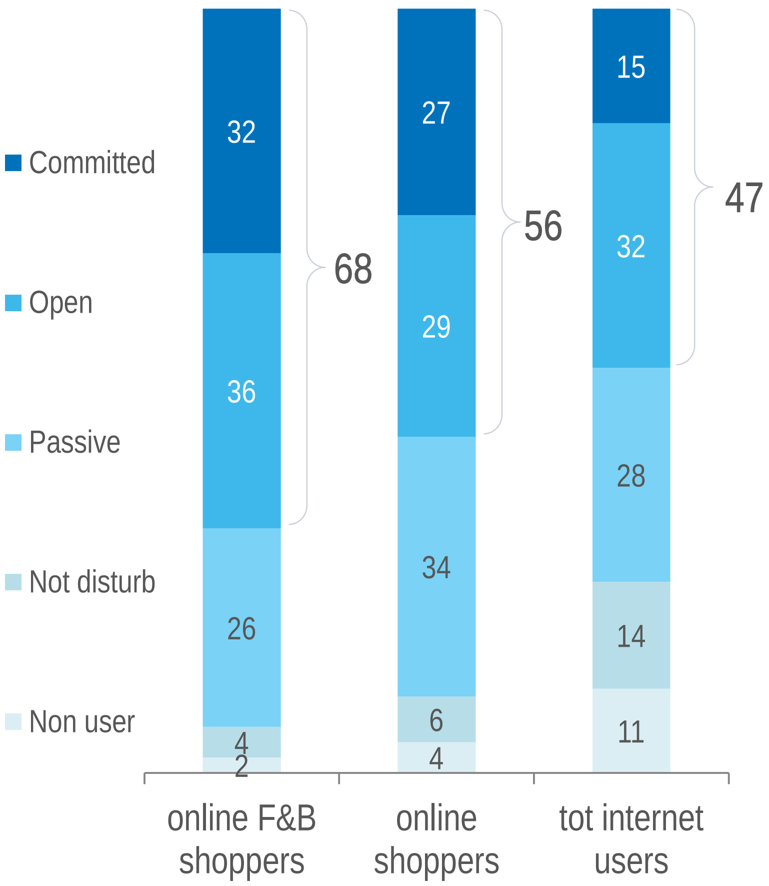
31%
online shoppers who use social networks **click on sponsored posts** if interesting
(1 mln ind.)

Sample: F&B shoppers & sn users, n=92 (9% of internet users); online shoppers & sn users, n=482 (48% of internet users); tot sn users, n=892 (89% of internet users)

*Affinity index = % target/ % total *100

A HIGH OPPORTUNITY TO ENGAGE ONLINE FOOD & BEVERAGE SHOPPERS VIA SOCIAL NETWORKS
Year 2017

CLUSTERS BASED ON THE "SOCIAL OPPORTUNITY INDEX" *
%



68% of online F&B shoppers are highly active social media users

32.1	27.5	21.5	SOI "Social Opportunity Index"

Sample: online F&B shoppers, n=94 (10% of internet users); online shoppers, n=501 (50% of internet users); tot. internet users aged 16-65, n=1,004

	Online F&B shoppers (n=94, 10%) %	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU benchmark (on tot internet users) 1st %
Committed+open	68	56	47	IT, ES: 47

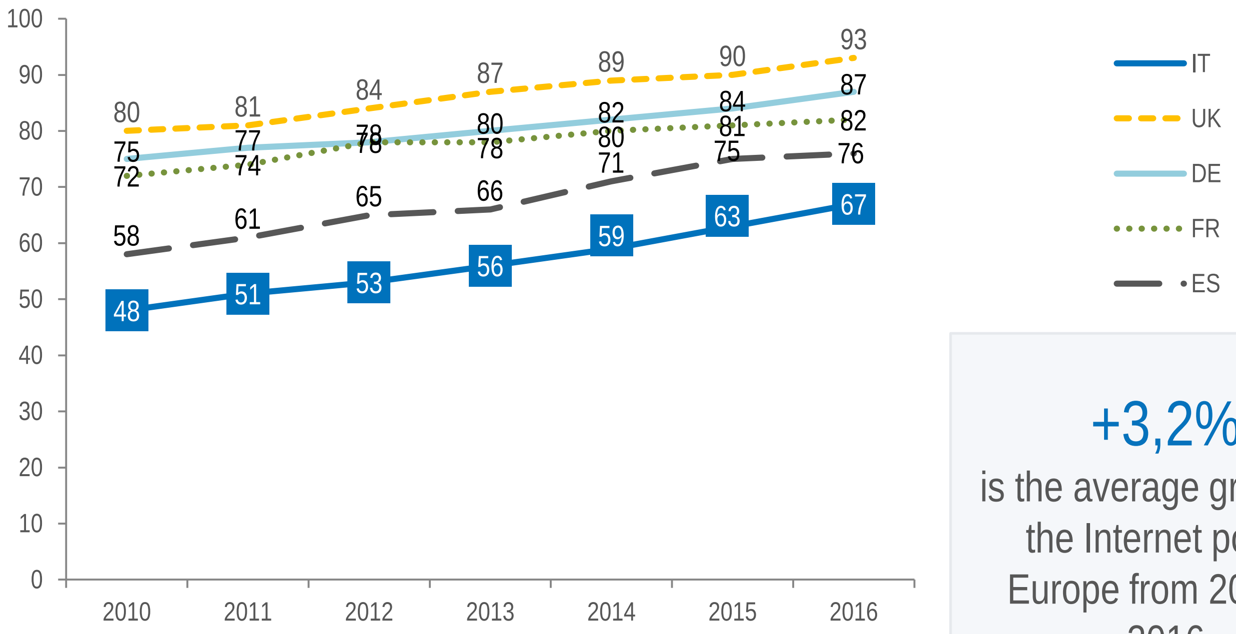
*For further information about this analysis, see p. 34 "DIGITAL INDEXES BY E+DBS17"

E+DBS17

Online trends 2017

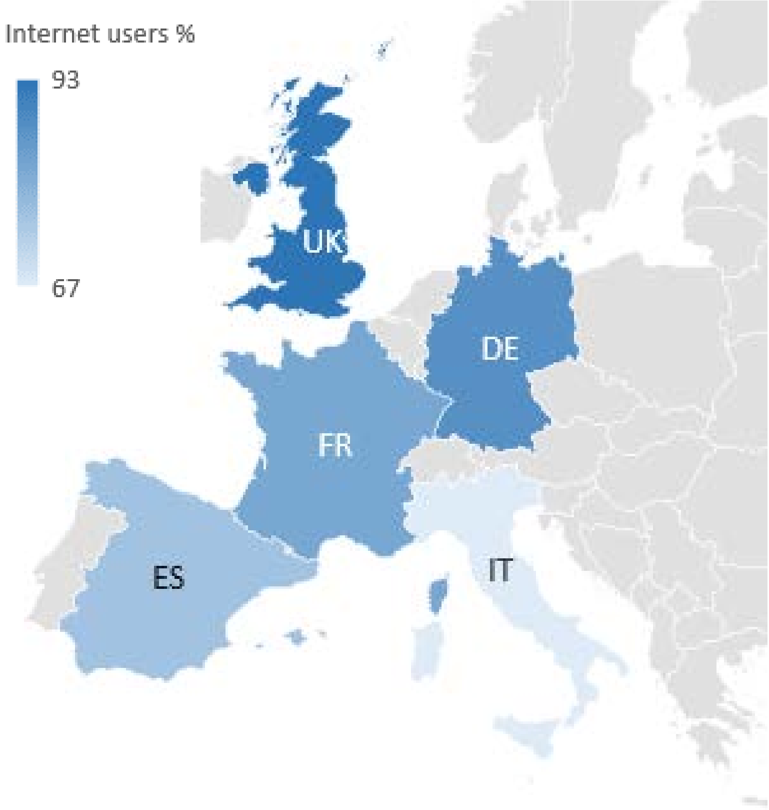
INTERNET SPREAD IN EUROPE
- Eurostat Data/ Information Society processed by Contactlab

WEEKLY USERS OF THE INTERNET IN EUROPE*: POPULATION 16-74 Y.O. (%)



+3,2%
is the average growth of the Internet pop in Europe from 2015 to 2016

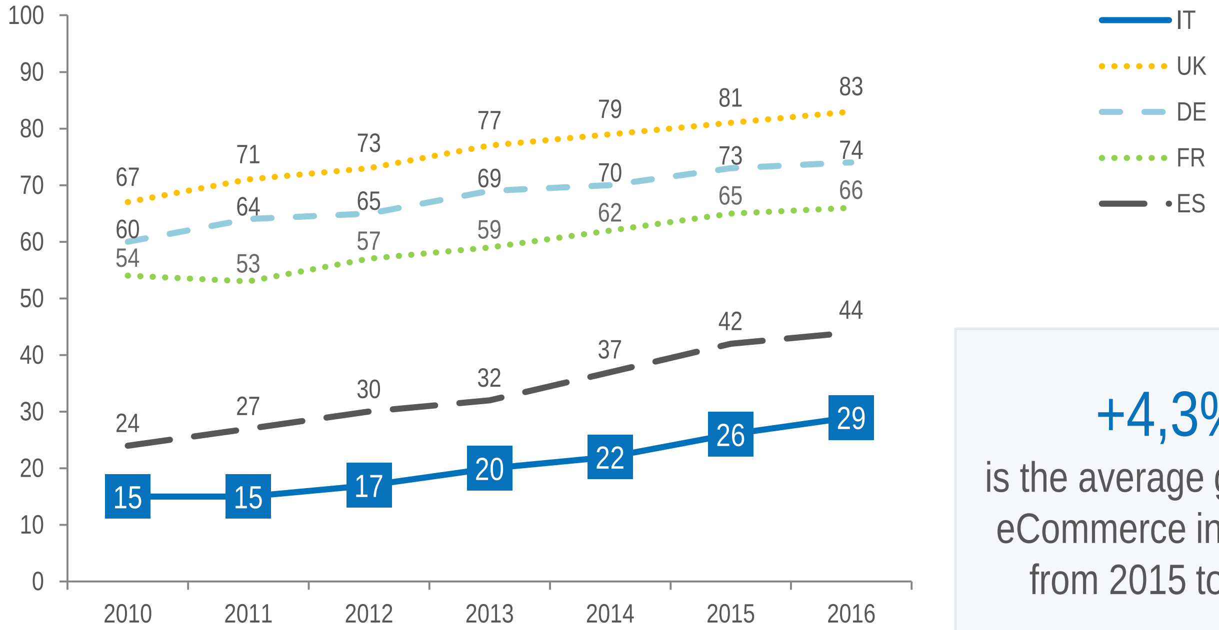
EUROPEAN COMPARISON



67%
Italian internet penetration among 16-74 y.o in 2016

THE SPREAD OF THE eCommerce IN EUROPE
- Eurostat Data/ Information Society processed by Contactlab

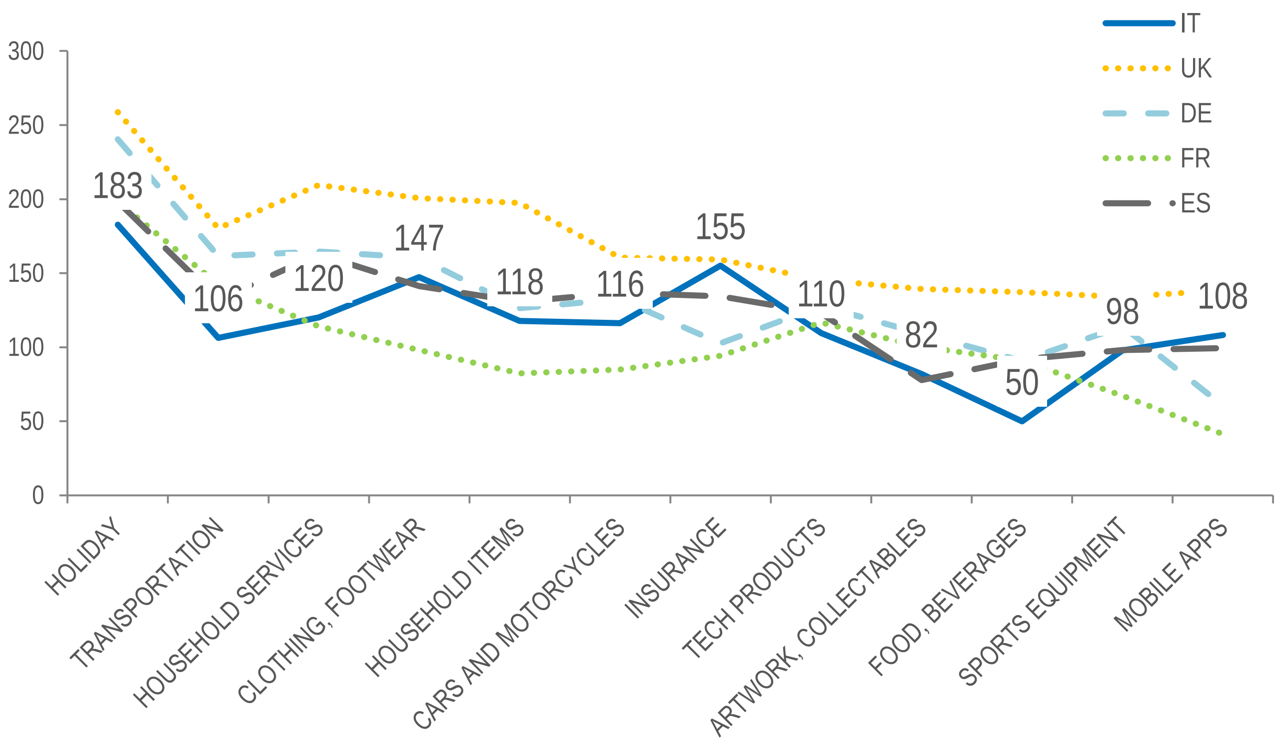
ONLINE SHOPPERS IN THE LAST 12 MONTHS*: POPULATION 16-74 Y.O. (%)



+4,3%
is the average growth of eCommerce in Europe from 2015 to 2016

Source: "Eurostat - Information Society" data processed by Contactlab

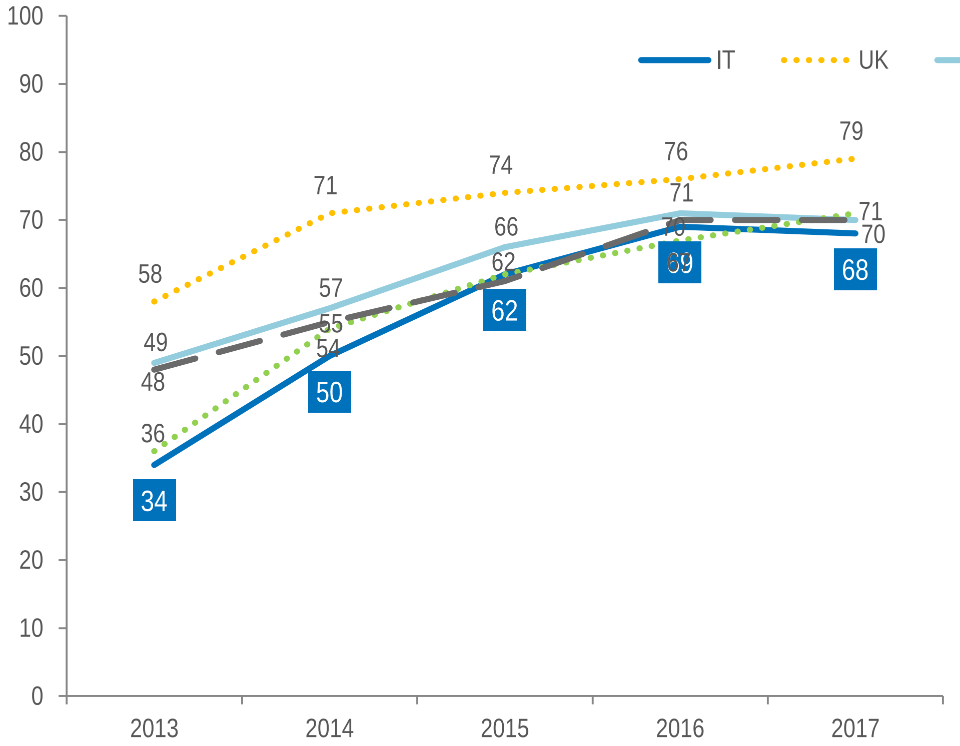
EXI* - ONLINE SPENDING INDEX BY E+DBS17



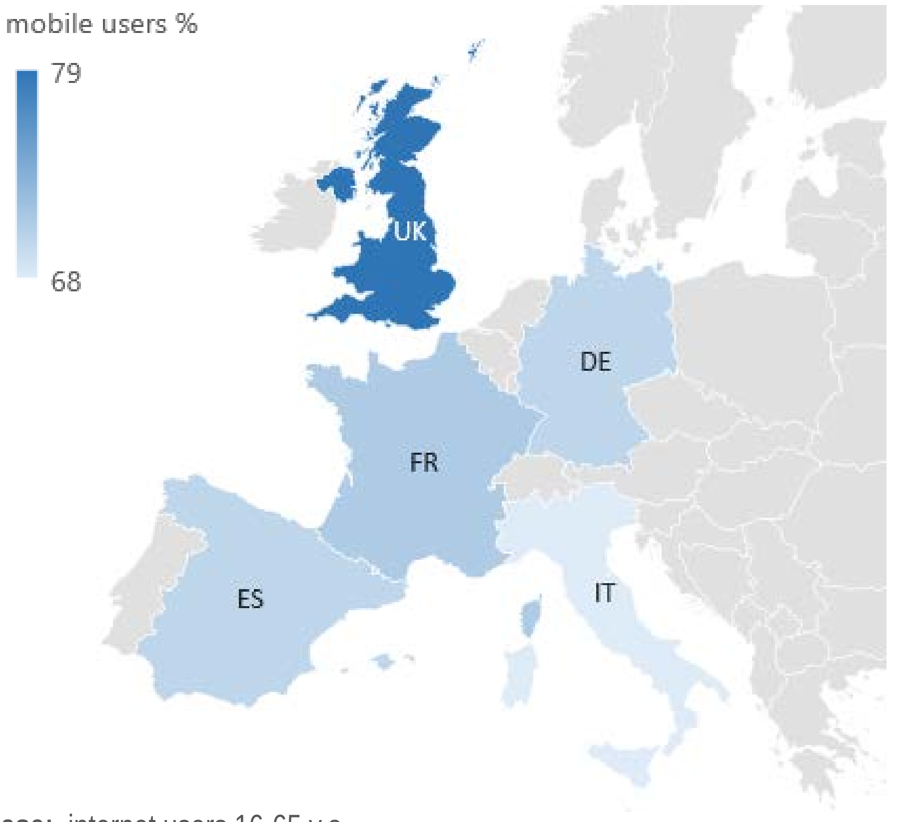
*EXI = expenditure over previous 12 months by category/ avg exp across 27 categ in 6 EU+ countries *100

MOBILE SPREAD IN EUROPE
E+DBS17 by Contactlab

MOBILE USERS IN EUROPE 16-65 Y.O. (%)



+1,4%
is the average growth of mobile users in Europe from 2016 to 2017



68%
of Italian internet users aged 16-65 connect to the internet using mobile devices

Base: internet users 16-65 y.o.

DIGITAL INDEXES BY E+DBS17

Users have been divided into clusters according to their level of digital interactivity and their relationship with direct channel communications (newsletters) and social media in order to calculate the engagement opportunities through owned media and supporting digital media plans.

DII: DIGITAL INTERACTIVITY INDEX

	IT	UK	DE	FR	ES
DII	42	50	44	45	50
Hyper-actives + +	21	31	24	27	35
Hyper-actives +	15	23	18	18	22
Actives	20	21	19	19	16
Passives -	20	13	18	15	12
Passives --	24	12	21	21	15

DOI: DIRECT OPPORTUNITY INDEX

	IT	UK	DE	FR	ES
DOI	46	42	41	44	40
Committed	7	7	5	6	8
Open	27	28	2	29	24
Passive	30	19	23	23	19
Opportunistic	1	1	2	1	1
Not disturb	15	8	33	21	11
Unaware	2	37	17	20	37

SOI: SOCIAL OPPORTUNITY INDEX

	IT	UK	DE	FR	ES
SOI	22	23	18	22	25
Committed	15	23	15	19	25
Open	32	22	19	23	22
Passive	28	32	32	33	38
Opportunistic	14	11	17	10	11
Non users	11	12	17	15	4

Base: internet users 16-65 y.o.

CROSSBORDER ONLINE SHOPPING BY E+DBS17

PENETRATION, REASONS FOR PURCHASING ABROAD AND CEFI INDEX

	IT	UK	DE	FR	ES
Cross-border shoppers (on online shoppers) - %	56	35	32	47	66
Individuals (mln)	8,9	13,2	15,5	15,7	12,1
Expenditure on foreign website (on total ecommerce expenditure of cross-border) - %	25	25	19	25	32
TOP3 reasons for buying abroad (base: cross-border shoppers), %					
• Better price	64	50	60	63	68
• Availability of products/ services (not offered on national sites)	45	47	46	30	39
• Greater selection of products, greater choice	31	30	31	43	29

CEFI: COUNTRY ECOMMERCE FACTOR INDEX

This index allows to measure each country potential for cross-border eCommerce; it is based on the image and attractiveness of each country

IMAGE: Thinking about online shopping, which of the following characteristics would you associate to these countries? timeliness of delivery, trustworthiness of online services/ websites, value for money, payment security, high quality of products, suppliers' reliability, security for treatment of personal data, uniqueness for some kinds of products

ATTRACTIVENESS: How strongly would you recommend buying a product online from a site based in that country? I would certainly recommend it = 10, 9, 8, 7, 6, 5, 4, 3, 2, 1, I would not recommend it at all = 0

CEFI 2017

- 1° GERMANY 27,8
- 2° SWITZERLAND 27,0
- 3° USA 23,3
- 4° FRANCE 22,3
- 5° ITALY 21,0

E+DBS METHODOLOGY

Interview method

CAWI (Computer-Assisted Web Interview) survey

Interview period: April 20th – May 8th, 2017
Average interview duration: 21 min.

Sample design

European + countries (Italy, UK, Germany, France, Spain, Switzerland):
sample of 'regular' internet users aged 16 – 65, who connect at least on a weekly basis, regardless of the device and reason, representative of the internet population of each country. The sample is based on the latest data provided by the Eurostat – Information Society and by national bureaus of statistics.

Extra-EU markets (New York, Shanghai, Tokyo, Moscow/St Petersburg, Korea):
Sample of 'online shoppers' 16-65, who purchased/ordered online goods/services in the last year, representative of the online shoppers of each market.
The sample is based on data from OECD and national bureaus of statistics.