eCommerce in Italy

A drill-down analysis based on E$^+$DBS 2017 (the annual digital behaviour study by Contactlab)

January 2018

Contactlab provides the leading **engagement marketing platform for commerce-focused companies and fashion & luxury brands** to develop successful digital communication programmes that enable personalised 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, deliver uniquely relevant messages at every touchpoint of the customer journey and measure performance with real-time dashboards that display all the relevant data. Our enterprise-grade platform is built with the highest **security level**, **reliability**, **management and scalability**.

Our solutions enable brands to gain insights into the context of each customer and **improve the retail experience by delivering highly individualised 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 Behaviour Study** is a project carried out **by Contactlab** since 2009. E^{+}DBS investigates the **evolution of internet users' behaviour**, measuring the relationship between users and digital channels and outlining 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 regular internet users aged 16-65.

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

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CHAPTER 1

Key findings and key numbers

KEY FINDINGS

The Italian digital landscape is evolving: more online shoppers and higher average online expenditure result in an online market value of €25.3 billion

- According to Eurostat data, **Italian online shopping penetration among internet users has grown by** 70% **over the past** 10 **years** vs. the European average of 30%
- **50%** of 16-65 year old internet users are **online shoppers**, that is **16.1 million**, a rise in 5.5 million since 2014
- However, in the European scenario, **Italy still lags behind all other countries** in terms of internet users, especially online shopping penetration (which in the UK and Germany is over 90%)
- **On average, Italian online shoppers spend €1,572** per year, primarily buying **fashion items** (54%) and spending the most on **holidays (on avg. €547)**

Online buying process: Italians prefer eCommerce portals; more than half buy from foreign websites

- **39%** of Italian online shoppers gather **pre-purchase information** on the **brand website** and more generally on online channels
- When it comes to the actual purchase, **53% prefer eCommerce portals**; e-retailers and product category websites (e-tailers) share second place (35%)
- **56% of Italian online shoppers buy cross-border**, spending **25% of their online budget on foreign websites**; the most popular product category purchased by cross-border buyers is fashion (21%), followed by tech products (17%)
- With regards payment methods, **the large majority** (70%) **of online shoppers use PayPal**; prepaid credit card is in second place, an option chosen by 45% of online shoppers

Click & collect is a further opportunity to expand eCommerce reach but its great potential is yet to be exploited

- Just 6% of internet users use C&C, but a remarkable **70% of internet users** (22.9 million individuals) are interested in **total omnichannel** (click & collect + eCommerce)

Online shoppers are highly digitalised (in terms of devices used and activities carried out online) and engageable through newsletters and social networks

- Newsletter is without doubt a great tool for reaching and engaging online shoppers: **86% subscribe to at least one newsletter** and 61% of newsletter users trust the content of the messages they receive
- Social networks are another useful channel for engagement as **96% of online shoppers are social media users** and 32% of them follow brands or companies

KEY NUMBERS

50% of internet users are **online shoppers**, that is **16.1 million individuals**

+70% rise in the online shopping penetration among internet users over the past 10 years (Eurostat)

€1,527
average annual online expenditure

€25.3 bn
estimated **market value of eCommerce**

56% of online shoppers buy **cross-border**,that is **8.9 million individuals**

96% of online shoppers use **social networks**

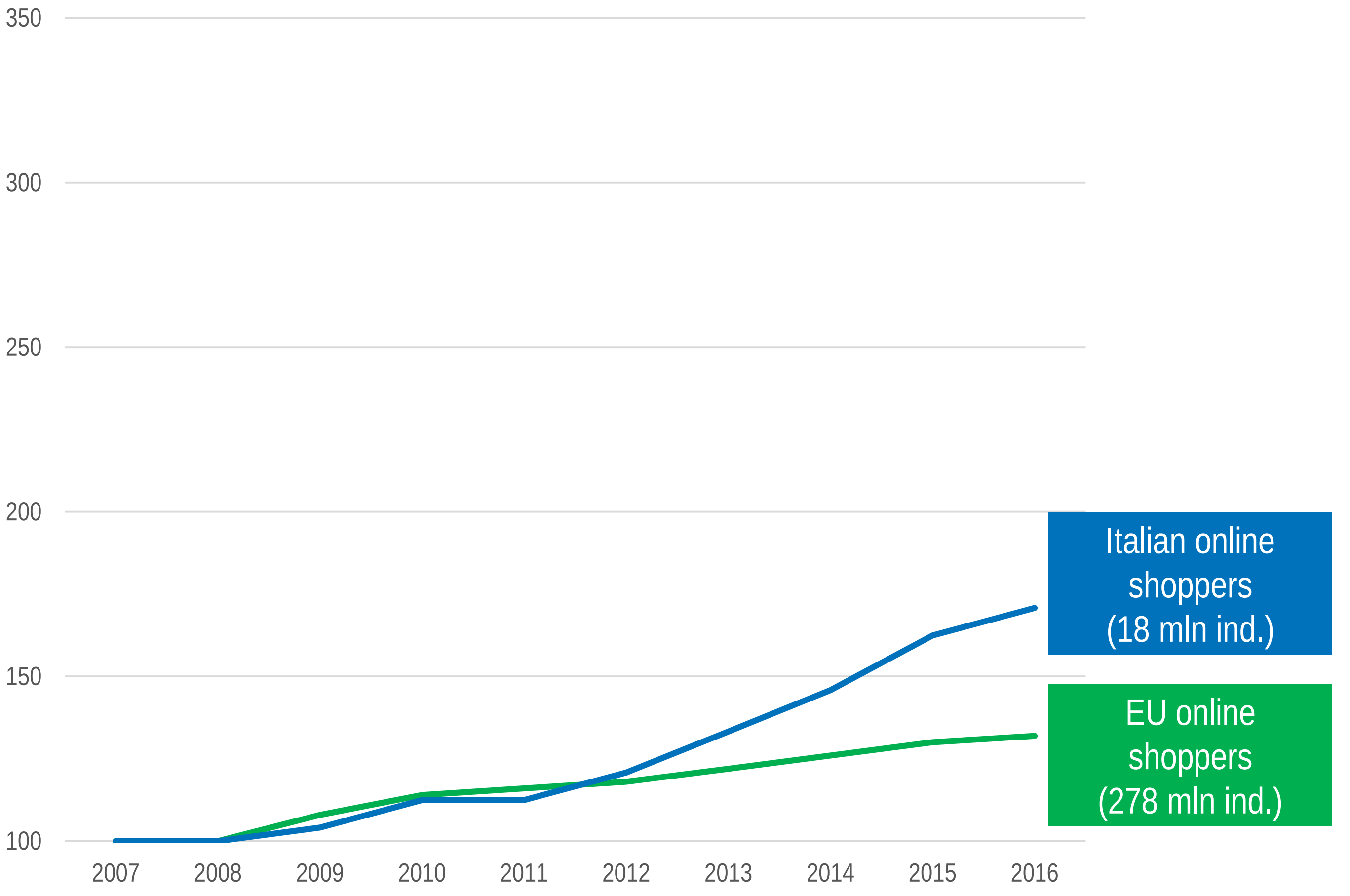
86% of online shoppers subscribe to at least one **newsletter**

CHAPTER 2

Online shopping behaviours

ONLINE SHOPPERS: 10-YEAR VIEW OF EU27 AND ITALY

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



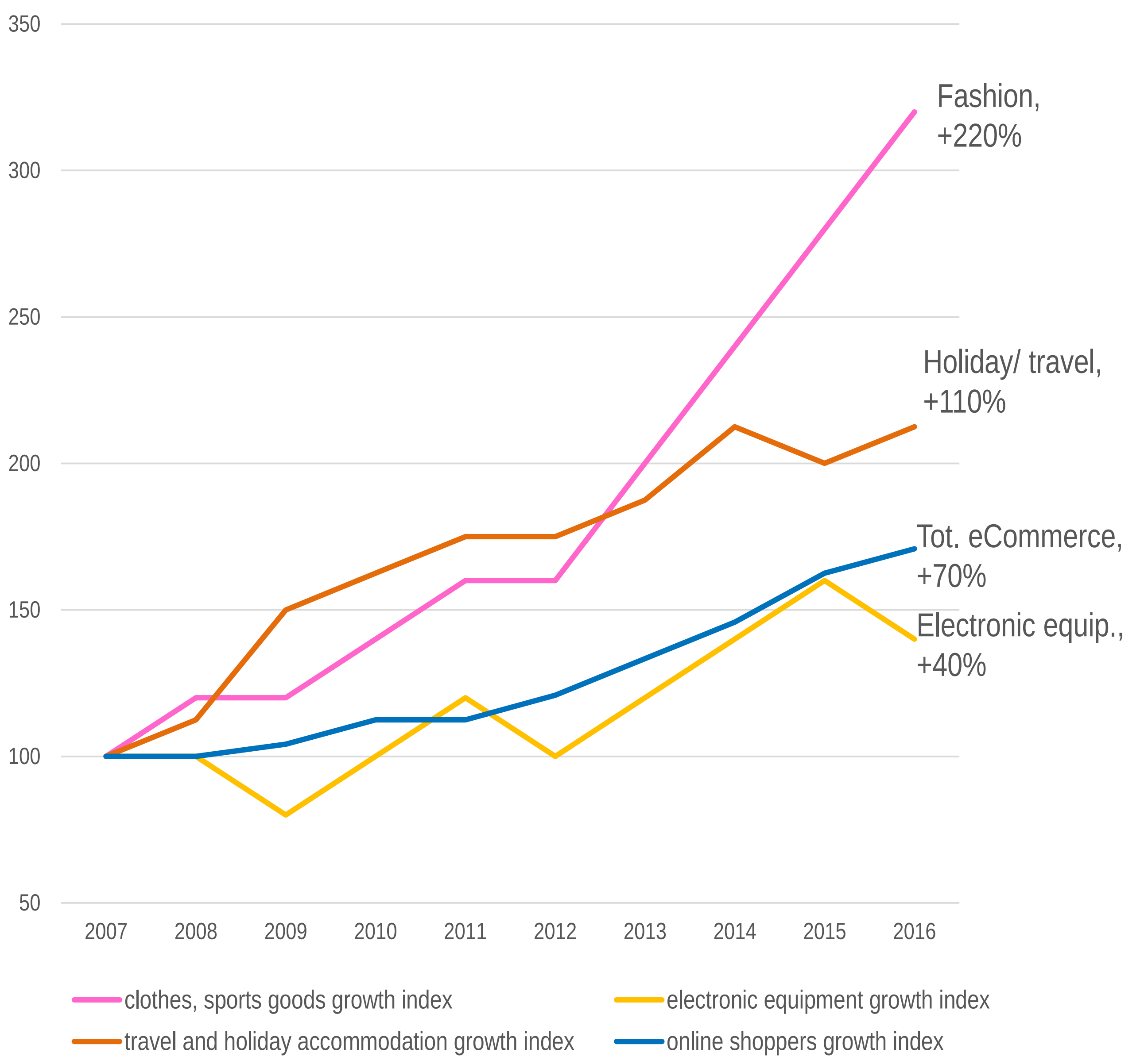
ONLINE SHOPPERS:

- Very significant growth in Italian online shopping penetration among internet users: +70% (vs. average European +30%)

*data source Eurostat, data processed by Contactlab

ITALIAN ONLINE SHOPPERS: MAIN PRODUCT CATEGORY TRENDS OVER PAST 10 YEARS

eCommerce GROWTH INDEX OVER THE PAST 10 YEARS AMONG 16-74 Y.O. – MAIN PRODUCT CATEGORIES*

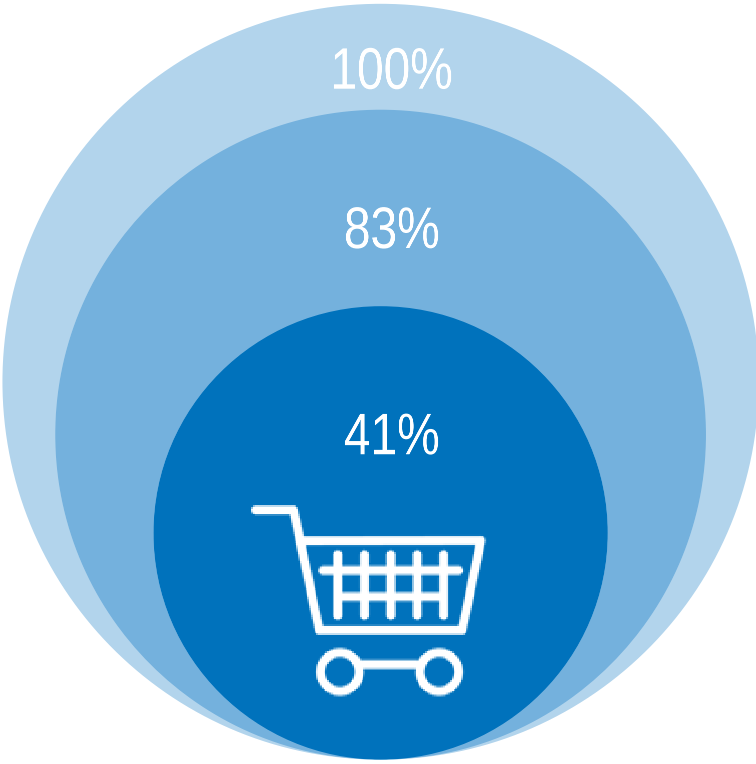


MAIN PRODUCT CATEGORIES SHOPPED ONLINE VS. GENERIC ONLINE SHOPPING

- Major growth in fashion (+220% vs. 2007) and holiday/travel (+110% vs. 2007)
- The growth of electronic equipment is lower than that of total online shopping

*data source Eurostat, data processed by Contactlab

DISTRIBUTION OF INTERNET AND eCommerce AMONG 16-65 y.o.



In 2017

41% of the population were

online shoppers

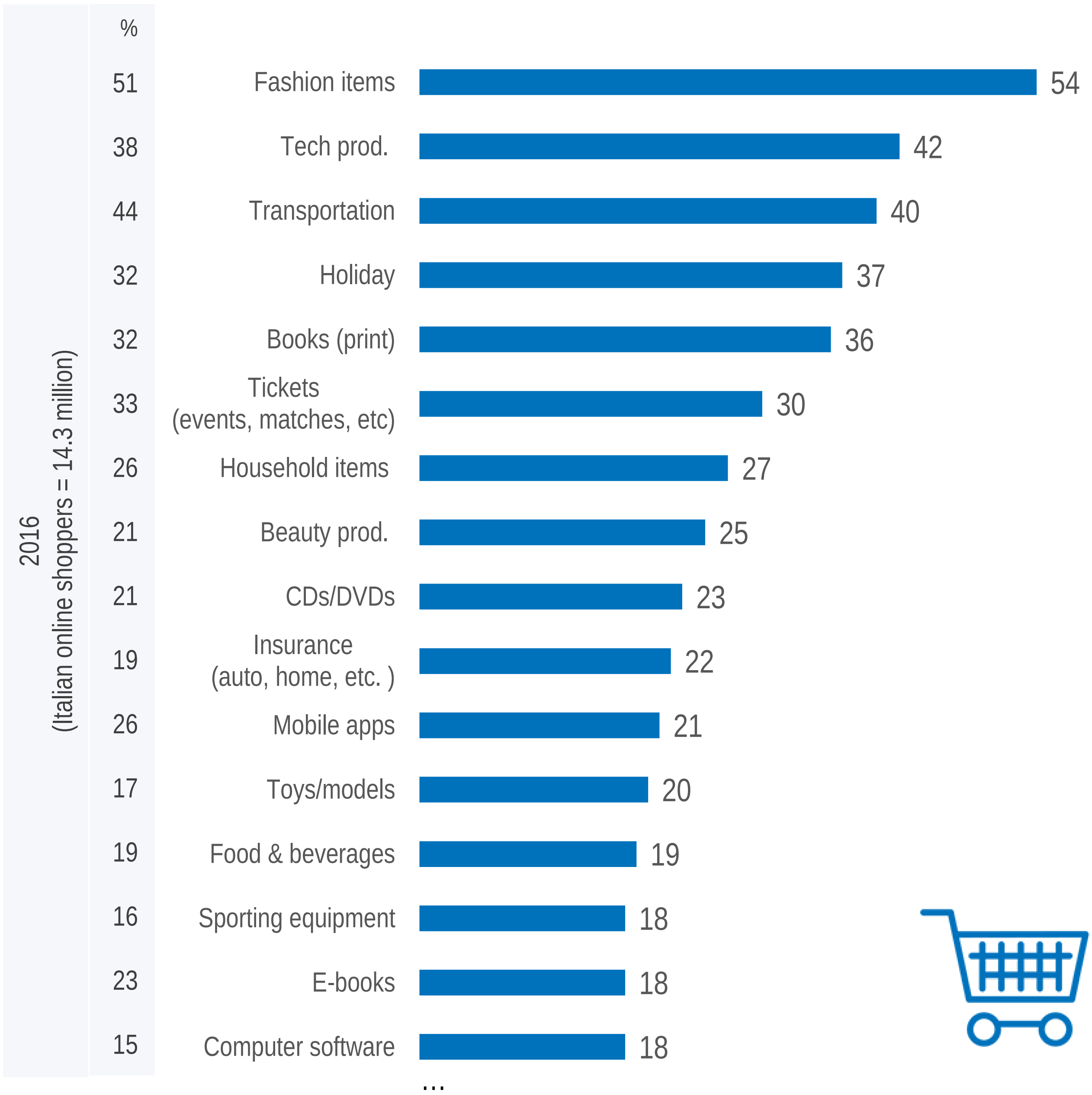
50% of regular internet users

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 months)	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? %

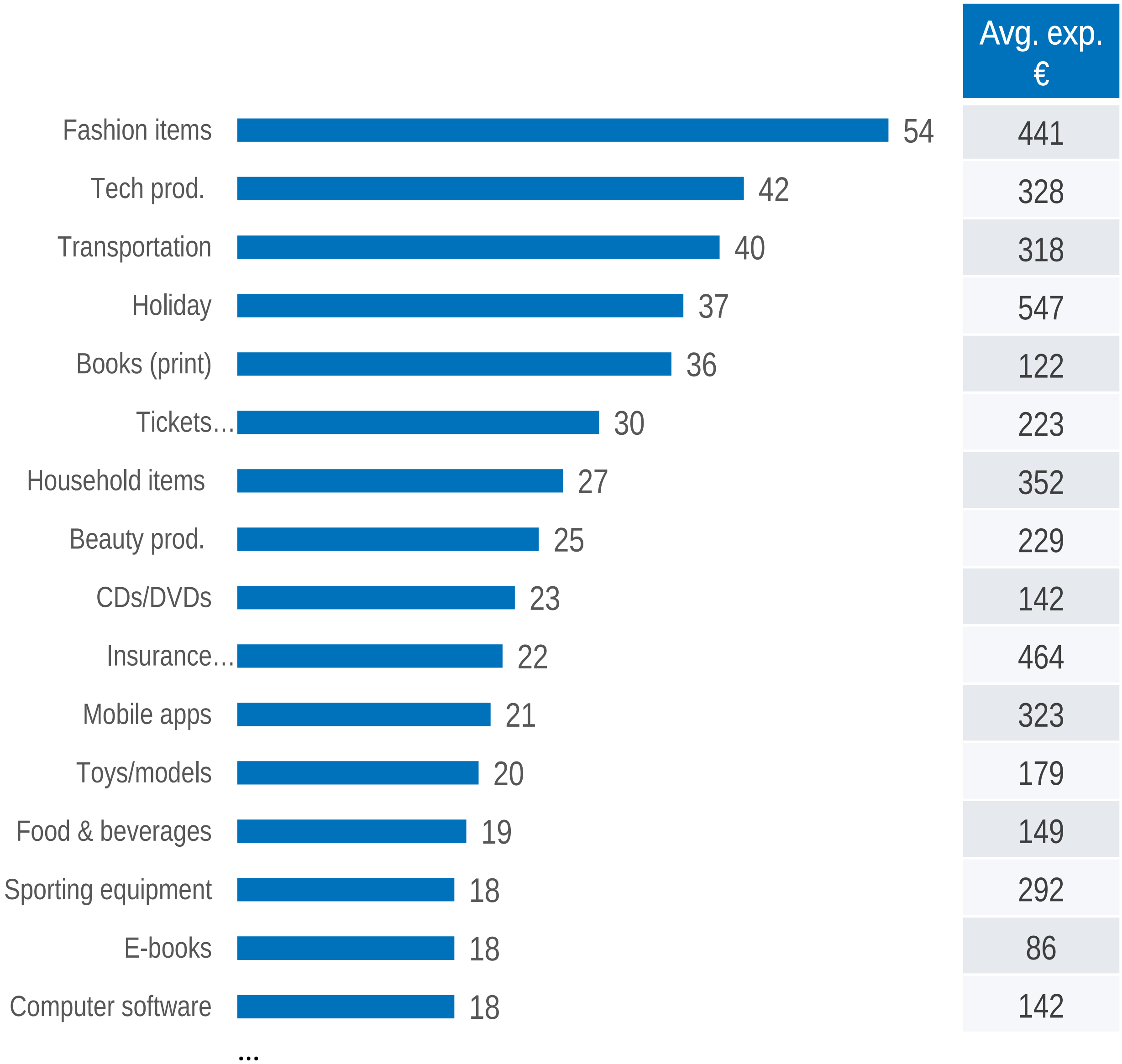


Sample: online shoppers 16-65 y.o., n=501 (50% of internet users)

- 54% of online shoppers purchase **fashion** items on the internet (8,700,000 ind.)
- Many online shoppers also bought **tech products** and **transportation**

HOW MUCH DO ONLINE SHOPPERS SPEND ON EACH CATEGORY?
Year 2017

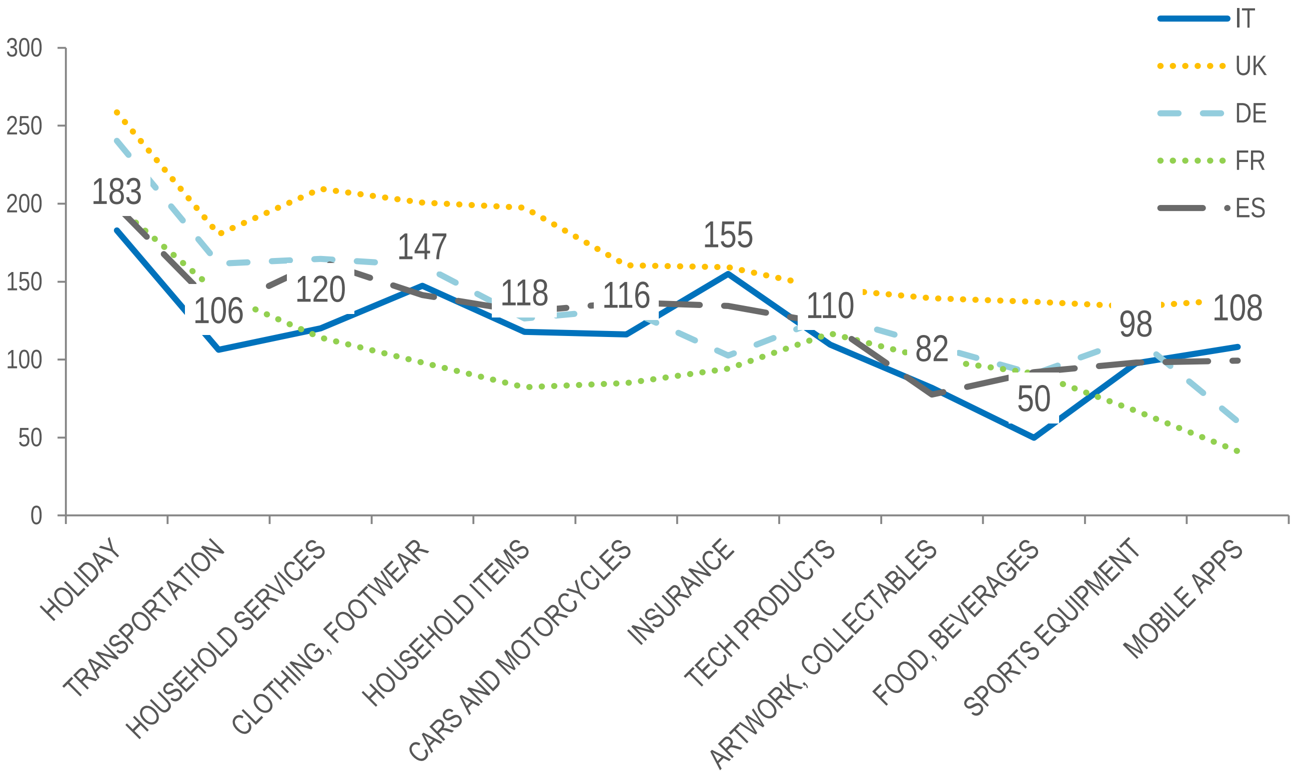
In the last 12 months, have you purchased at least one product or service from one of the following categories of merchandise? %



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

- With an average expenditure of **€547**, **holiday** is the category where online shoppers spend the most
- **Insurance (€464)** is in second place for average expenditure
- **Fashion (€441)** is in third place and is also the most popular product category shopped online

EXI* - eCommerce EXPENDITURE INDEX 2017 (MAIN CATEGORIES)

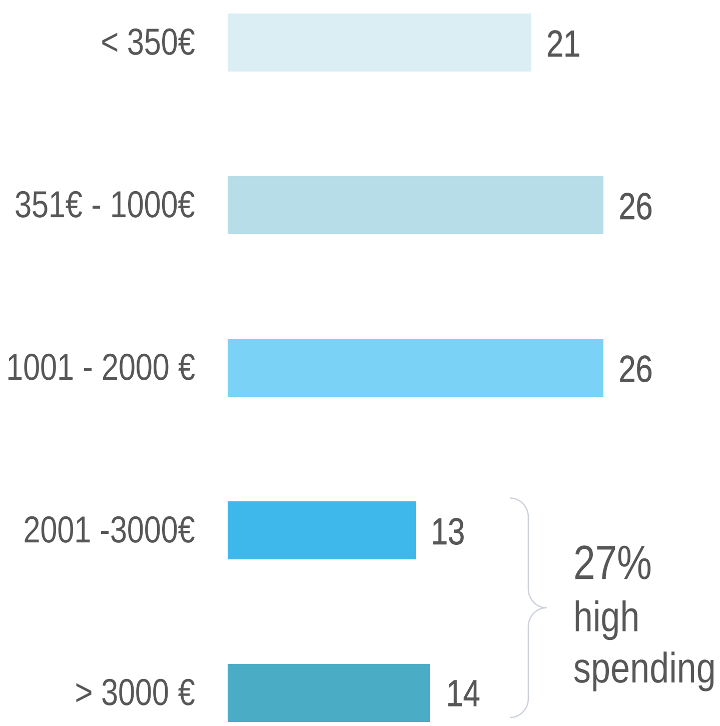


Categories sorted by EU avg spending	IT	UK	DE	FR	ES
HOLIDAY	183	259	240	198	198
TRANSPORTATION	106	180	162	142	132
HOUSEHOLD SERVICES	120	209	165	114	163
CLOTHING, FOOTWEAR	147	201	161	98	141
HOUSEHOLD ITEMS	118	197	126	82	131
CARS AND MOTORCYCLES	116	161	132	85	137
INSURANCE	155	159	103	94	134
TECH PRODUCTS	110	145	128	117	123
ARTWORK, COLLECTABLES	82	139	109	100	78
FOOD, BEVERAGES	50	137	91	91	92
SPORTS EQUIPMENT	98	134	114	67	98
MOBILE APPS	108	138	60	41	99
...					

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

HOW MUCH DOES AN ONLINE SHOPPER SPEND YEARLY?
Year 2017

How much have you spent online in the last 12 months?
%



The **average online spending** in 2017 is **€1,572** per year

(on 27 inquired categories)

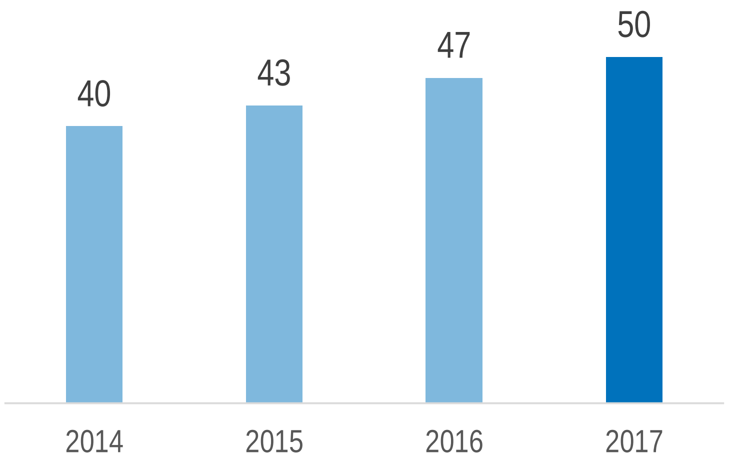
Sample: online shoppers 16-65 y.o. n=501 (50% of internet users)

- 27% of Italian online shoppers spend **more than €2,000 per year** on their online purchases
- The **top 3** product categories by average expenditure are: **holiday** (€547), **insurance** (€464) **and fashion** (€441)
- Average European* online expenditure is €1,766
- European* estimated market value is €280 bn

*Countries considered: Italy, UK, Germany, France, Spain

ONLINE SHOPPERS: 4-YEAR TREND IN ITALY AND EUROPE

ONLINE SHOPPING PENETRATION AMONG INTERNET USERS IN ITALY



+25% rise in online shopping penetration
among internet users vs. 2014

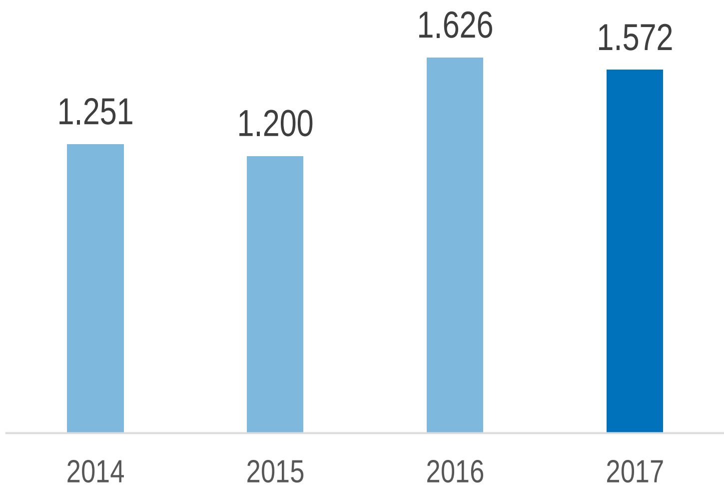
EUROPEAN VIEW:

	INTERNET USERS %	ONLINE SHOPPERS %	INDIVIDUALS (,000)
ITALY	83	50	16,100
UK	98	93	38,300
GERMANY	97	92	48,100
FRANCE	90	88	33,200
SPAIN	91	67	18,400

Sample: internet users 16-65 y.o.

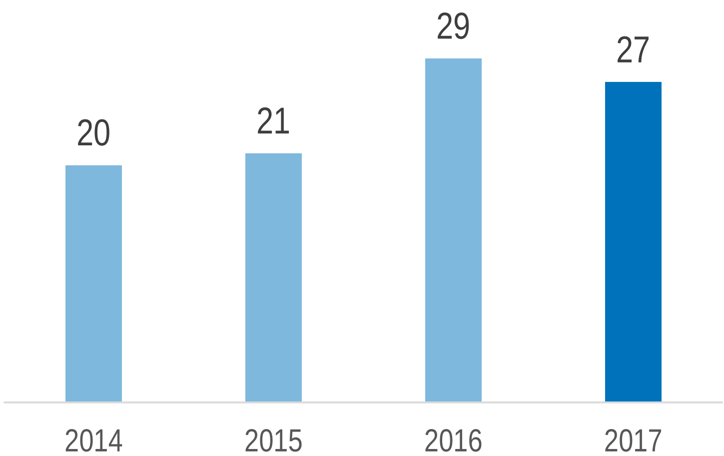
AVERAGE EXPENDITURE AND HIGH SPENDING - 4-YEAR TREND
Year 2017

AVERAGE ONLINE EXPENDITURE



+26% rise in average online expenditure
vs. 2014

PERCENTAGE OF HIGH SPENDING* AMONG ONLINE SHOPPERS



+35% rise in high spending
vs. 2014

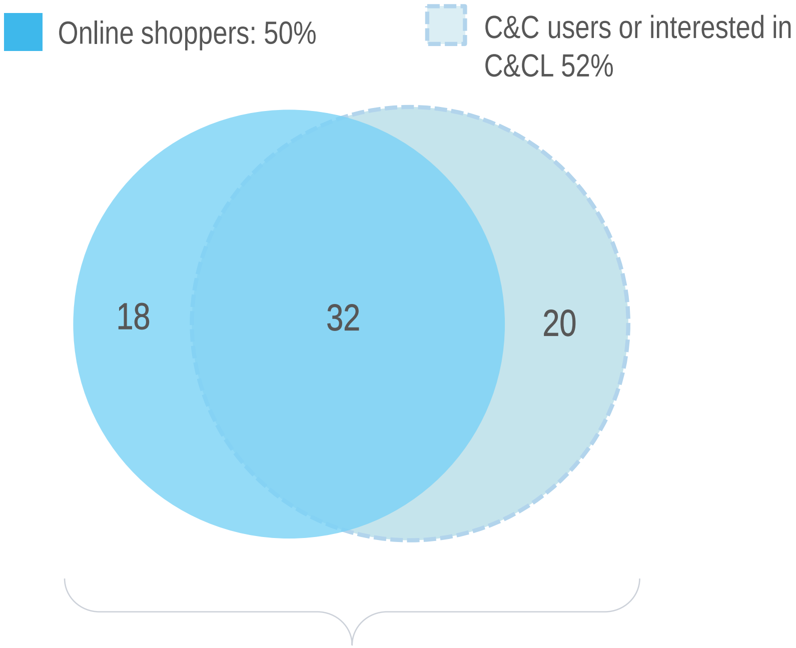
Sample: online shoppers 16-65 y.o.

+ 90% rise in the estimated Italian online market value:
from **13.3 bn** in 2014 to **25.3 bn** in 2017

More than 2000 €/ year

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

Would you be interested in buying products through C&C*?
(Nowadays it is possible to make a purchase through the "click & collect" method, i.e. buying or ordering goods from a store's website and collecting them from a local branch)
%



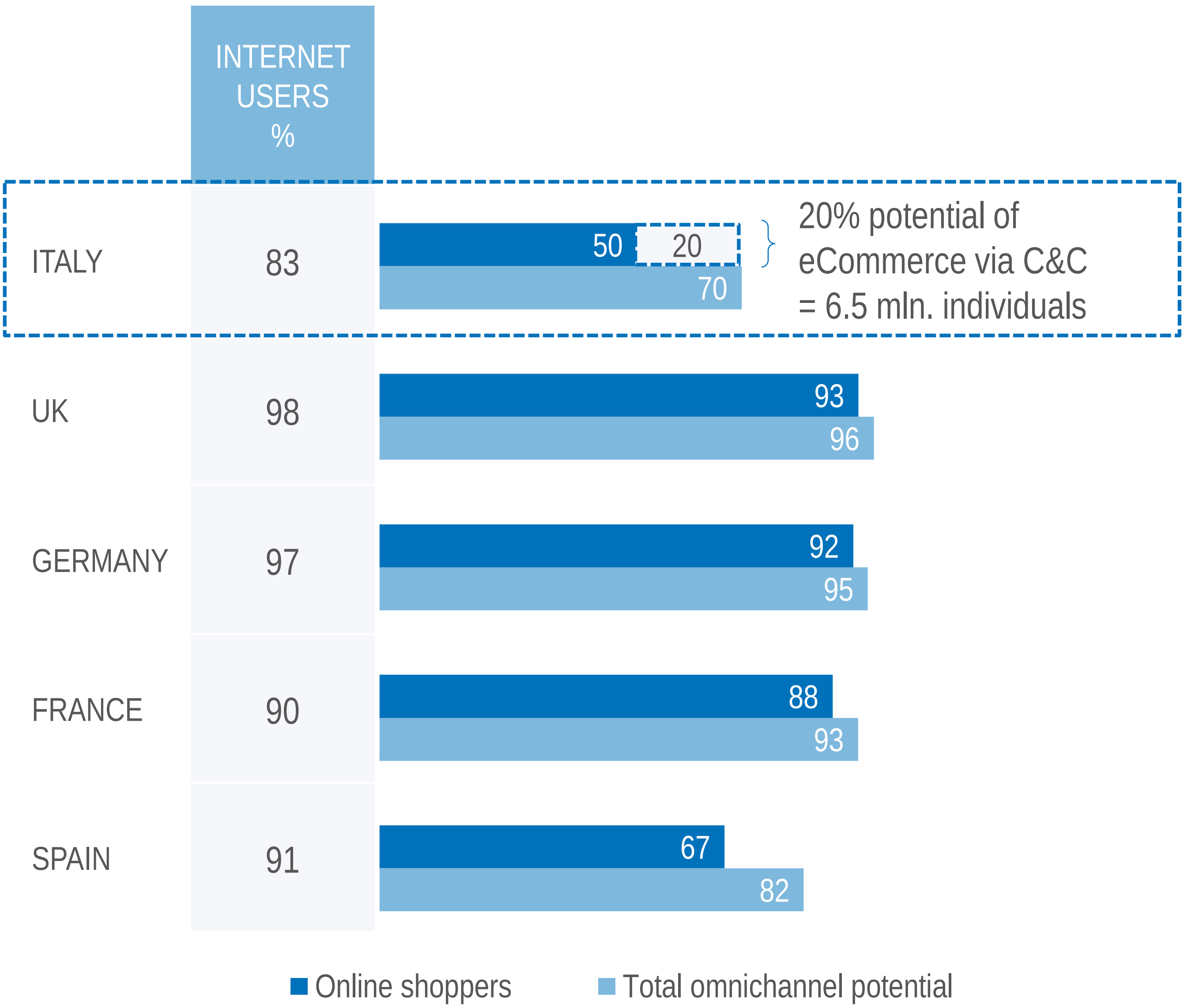
Total omnichannel potential
(eCommerce + click & collect):
70% of internet users

52% of Italian internet users are **interested in or use click & collect**
16.9 mln. individuals
(6% of internet users have already bought products using click & collect:
2 mln. individuals)

- Clothing and accessories (4%) is the most popular product category for click & collect
- In the European landscape, the UK is the leader with 14% of internet users already using click & collect and 46% interested in the service

Sample: Internet users 16-65 y.o. (n=1,004)
*5 categories analysed: clothing, tickets/reservations, books, food & beverage, tech products

OMNICHANNEL CLICK & COLLECT / eCommerce MARKET POTENTIAL
Year 2017



Sample: Internet users 16-65 y.o.
*Countries considered: Italy, UK, Germany, France, Spain

THE MOST USEFUL PRE-ONLINE PURCHASE INFORMATION CHANNELS
Year 2017

Thinking about all the products or services you bought online, which are the most useful channels you found for information? %

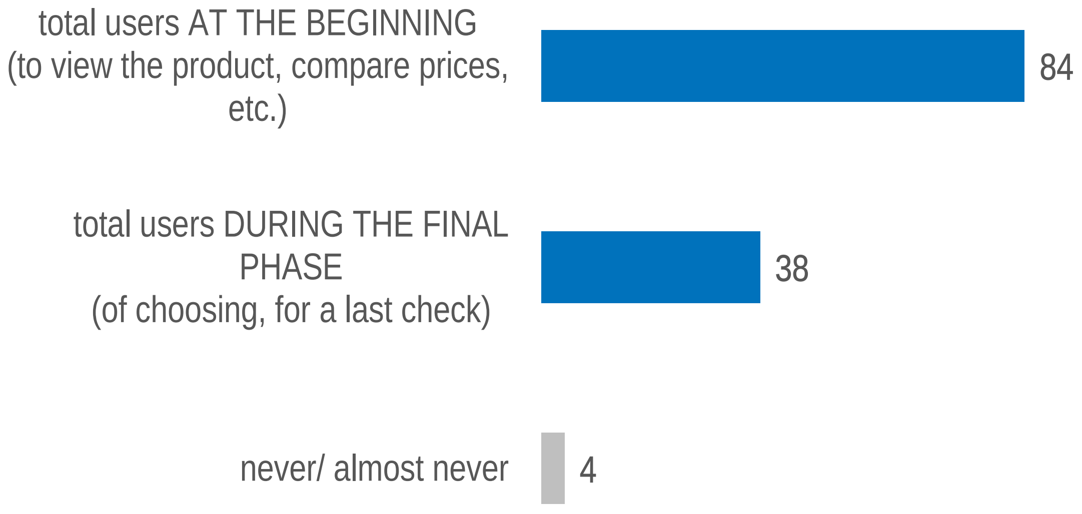
39%
of online shoppers
gather pre-purchase information on the brand website
(6.3 mln individuals)

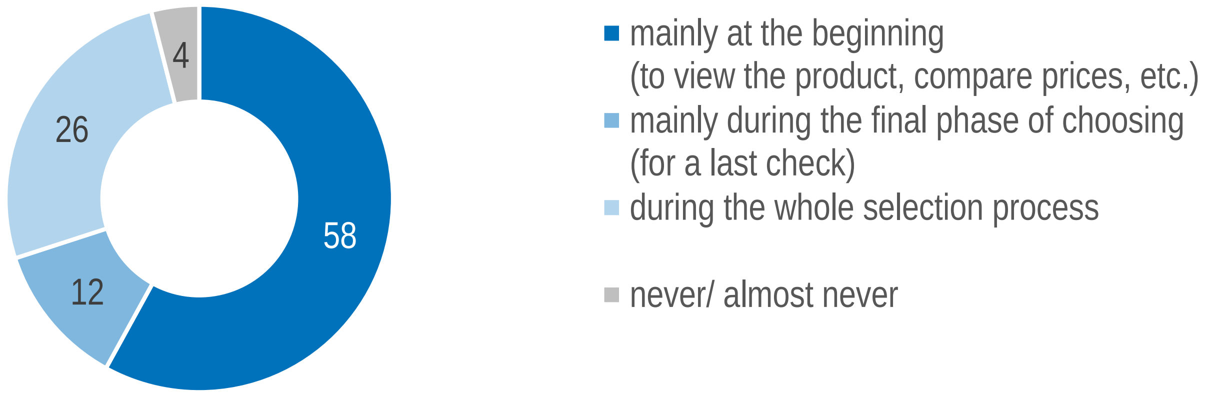
The preferred offline channel for pre-purchase information is peer recommendation
(26%, 4.2 mln individuals)

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

SEARCH ENGINE USE
Year 2017

Do you use any search engines (e.g. Google) to find a product you want to buy online? If so, when?





- 96% of online shoppers **use a search engine** at some point in the purchase process
- **26% use a search engine during every phase of the purchase**

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

eCommerce CHANNELS – ITALIANS RECOMMEND AND USE eCommerce PORTALS
Year 2017

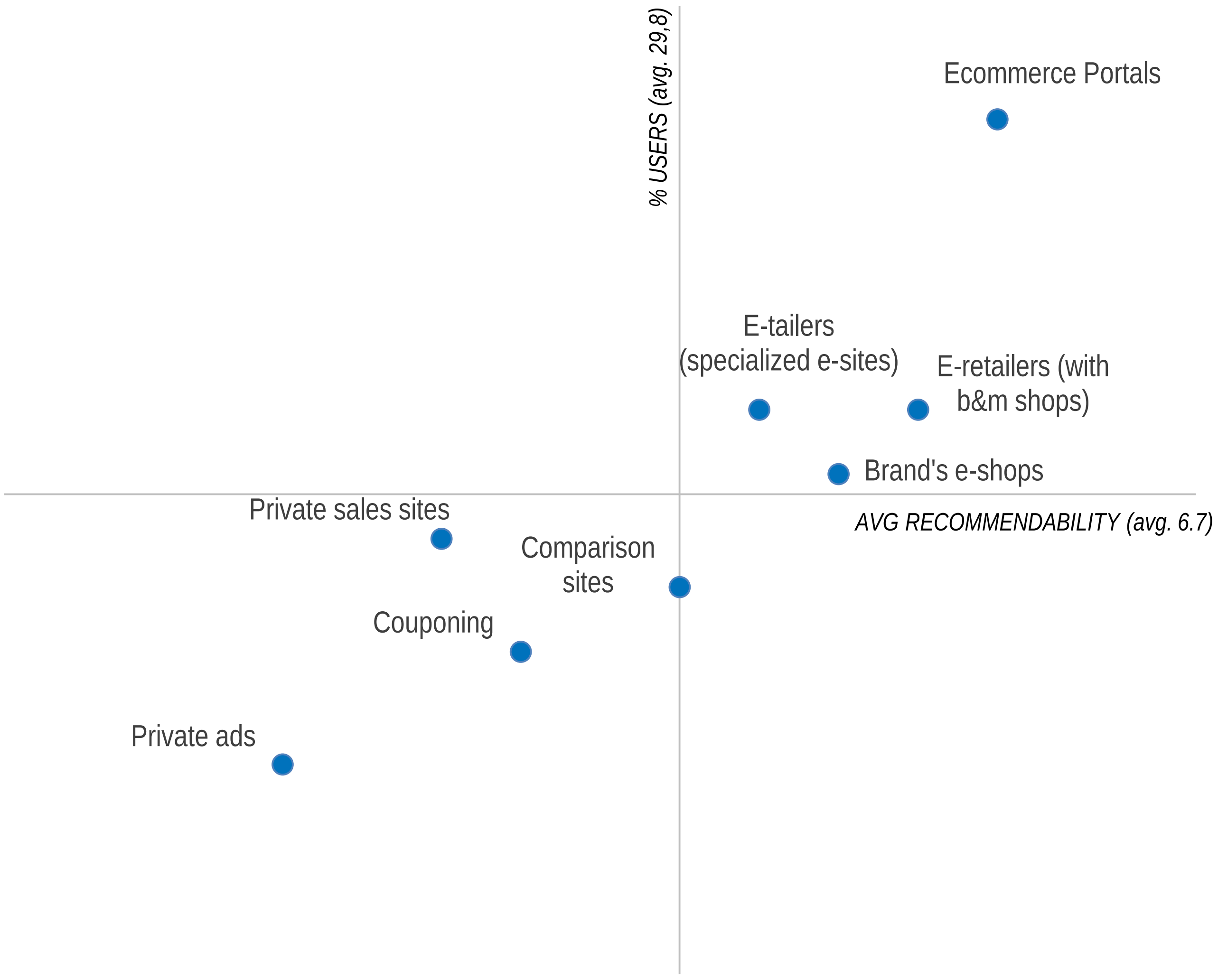
When shopping online, where do you place your orders? (**users** %)
How strongly would you recommend online shopping through the following channels? (**recommendability** %)
%

	USERS %	RECOMMENDABILITY AVG. (10-0)
ecommerce portals with various product categories	53	7.5
sites of retailers that also have shops	35	7.3
product category websites/ e-tailer	35	6.9
online shop of the brand	31	7.1
private sales sites	27	6.1
comparison sites (offers and prices)	24	6.7
online purchasing groups with coupon	20	6.3
from online private ads	13	5.7

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

- **eCommerce portals** are the most used and well-promoted online shopping channel
- **Retailers' websites** and **e-tailers** are often commonly preferred channels
- Retailers' websites are the first choice in the UK (58%), Germany (50%) and France (45%)

eCommerce CHANNELS MAP - USERS vs. RECOMMENDABILITY
Year 2017



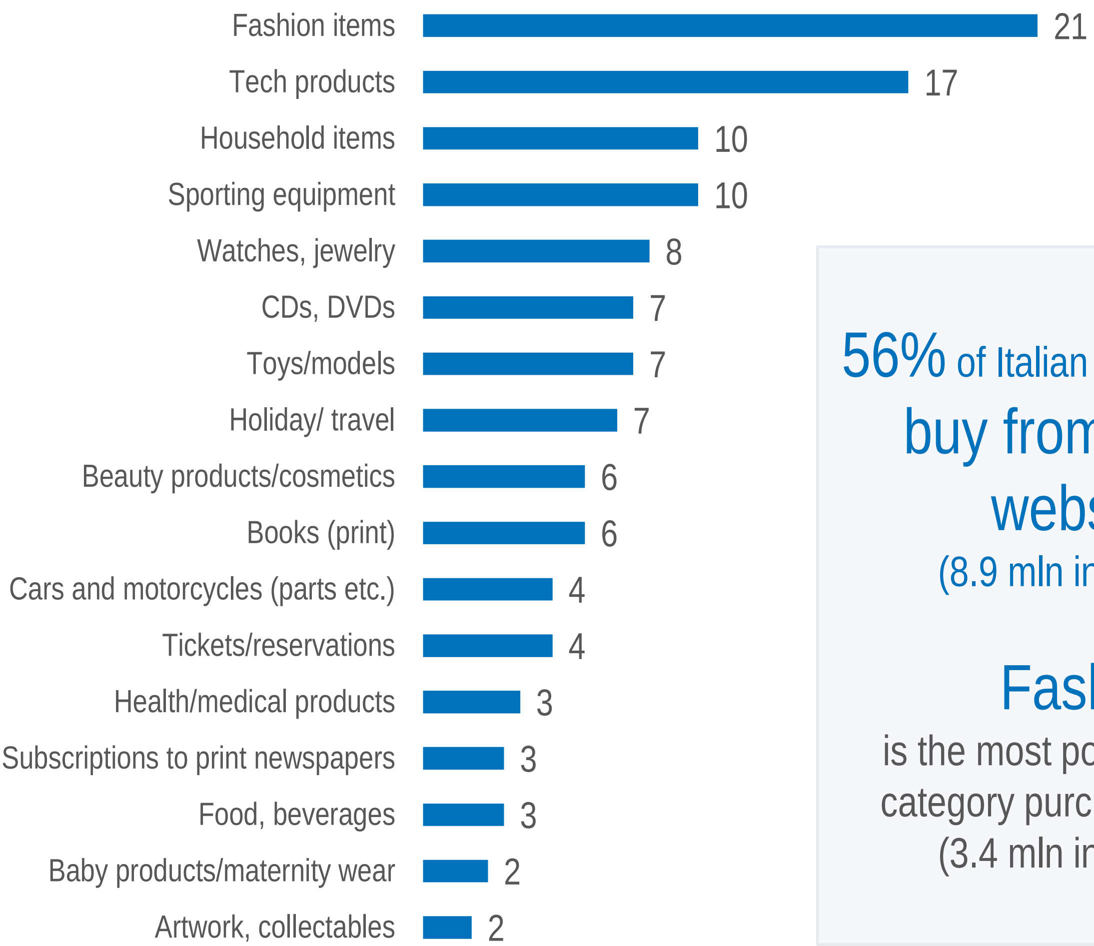
Sample: online shoppers 16-65 y.o., n=501 (50% of internet users)

- **eCommerce portals** get by far the highest score being **used by 53%** of online shoppers and **averaging 7.5 out of 10 in terms of recommendability**
- Second place goes to **e-retailers** that also have b&m shops, which are **used by 35%** of online shoppers, **averaging 7.3 out of 10 for recommendability**

WHICH PRODUCTS AND SERVICES DO ONLINE SHOPPERS BUY ON FOREIGN WEBSITES?
Year 2017

Which of the following products/services have you bought on foreign eCommerce sites?

%



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

Fashion is the most popular product category purchased abroad (3.4 mln individuals)

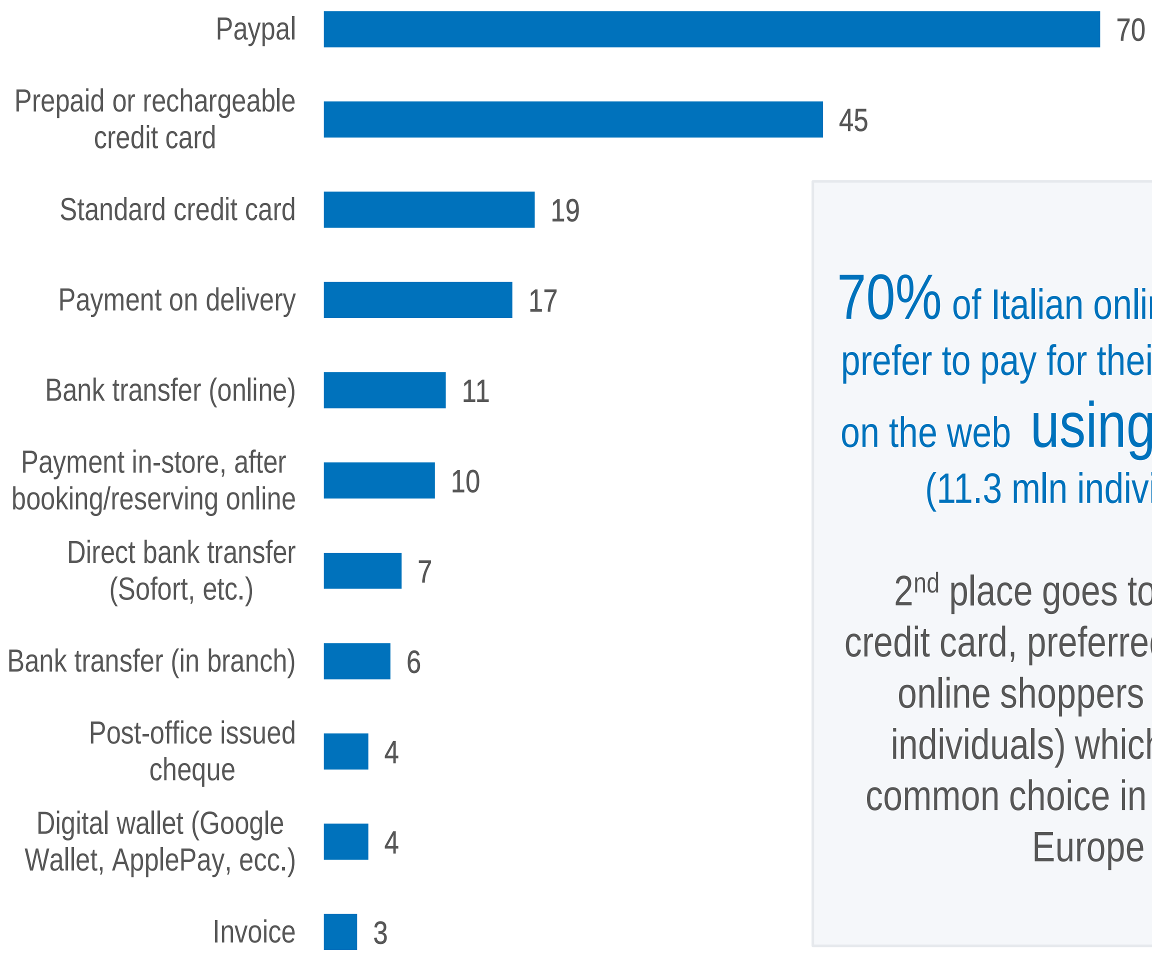
Sample: online shoppers 16-65 y.o., n=501 (50% of internet users)

	Italy (n= 501, 50%) %	UK (n=930, 93%) %	Germany (n=959, 92%) %	France (n=884, 88%) %	Spain (n=679, 67%)
Cross-border shoppers	56 = 100	35 = 100	32 = 100	47 = 100	66 = 100
% of spending on foreign websites	25	25	19	25	32

ONLINE SHOPPERS' PAYMENT METHODS: ITALIANS PREFER PAYPAL

Year 2017

With regards online purchases, what payment methods do you prefer to use?
%



70% of Italian online shoppers prefer to pay for their purchases on the web using PayPal (11.3 mln individuals)

2nd place goes to prepaid credit card, preferred by 45% of online shoppers (7.2 mln individuals) which is not a common choice in the rest of Europe

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

EU COMPARISON:	Italy (n= 501, 50%) %	UK (n=930, 93%) %	Germany (n=959, 92%) %	France (n=884, 88%) %	Spain (n=679, 67%)
Paypal	70	69	72	53	74
Prepaid or rechargeable credit card	45	6	7	9	18
Standard credit card	19	43	21	56	32

Sample: Online shoppers

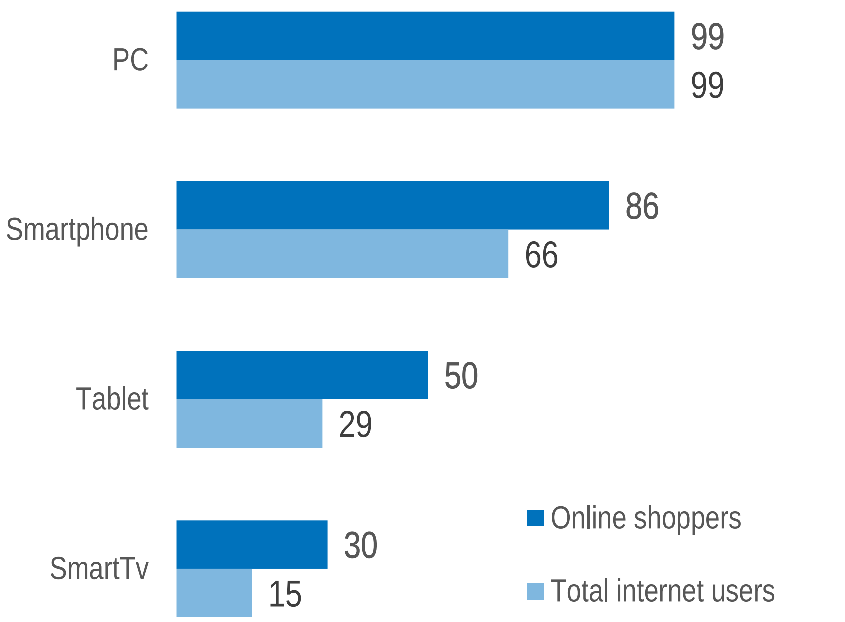
CHAPTER 3

Digital profile (beyond sociodemographic)

ONLINE SHOPPERS ARE MORE TECHNOLOGICALLY ADVANCED THAN INTERNET USERS

Year 2017

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



Sample: Online shoppers n=501 (50% of internet users) / tot Internet users 16-65 y.o. n=1,004

86%
of online shoppers use a smartphone
to connect to the internet (13.8 mln individuals)

+29%
Avg. penetration of mobile devices among online shoppers vs. total internet users

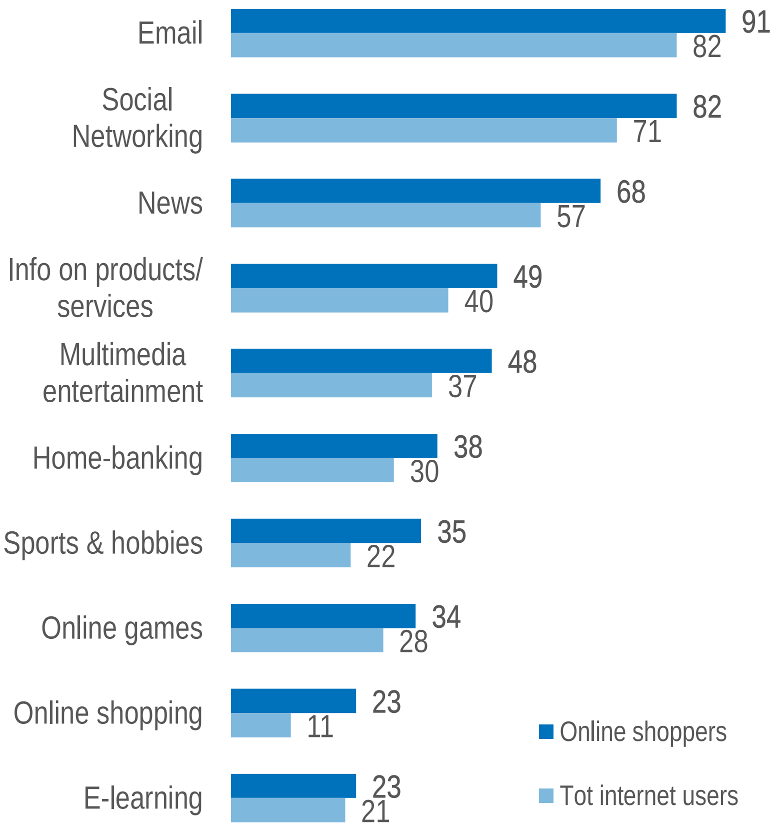
5 hrs
avg. hours online shoppers' spent online daily for personal purposes

	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU Benchmark (of tot internet users) 1st %
Total mobile users (smartphone OR tablet)	88	68	UK = 79
Triple players (pc AND smartph. AND tablet)	48	27	UK = 41
Hours spent online (avg. daily)	*5.6*	*5*	IT
Online shopping on smartphone	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 through a fixed internet connection or mobile? %

WEEKLY ACTIVITIES



91%
of online shoppers use email on a weekly basis
(14.7 mln individuals)

82%
of online shoppers use social networks weekly
(13.2 mln individuals)

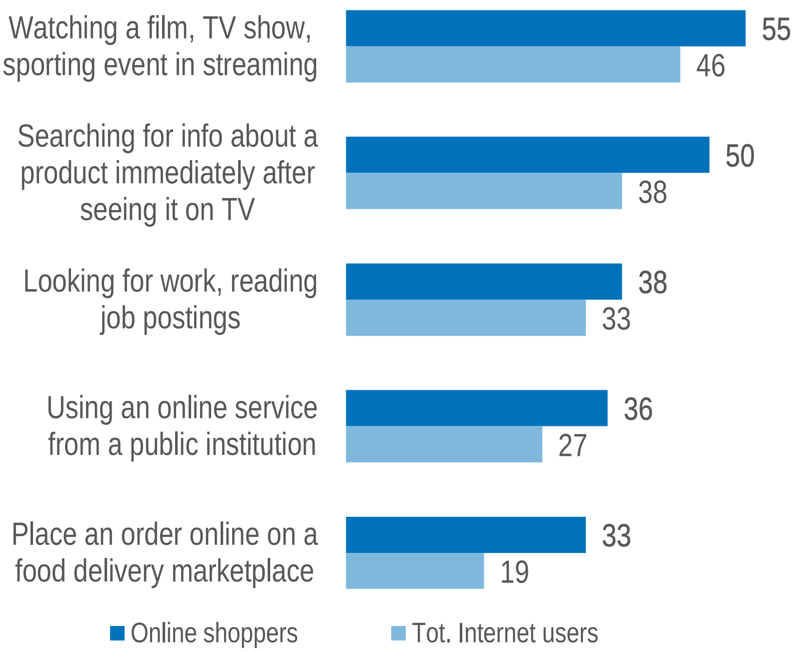
49%
of online shoppers search for information on product/services online weekly
(7.9 mln individuals)

Sample: Online shoppers n=501 (50% of internet users) / tot Internet users 16-65 y.o. n=1,004

	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU Benchmark (of tot internet users) 1st %
Email	91	82	ES: 91
Social networking	82	71	ES: 82
Searching for info on products or services	49	40	ES: 57

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

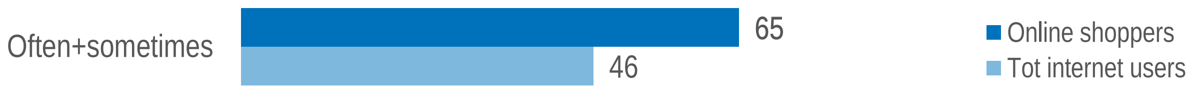
ACTIVITIES DONE AT LEAST ONCE IN THE PAST 4 WEEKS



55%
of online shoppers stream videos monthly
(8.9 mln individuals)

50%
look for info about a product or brand
after seeing it on TV
(8.1 mln individuals)

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

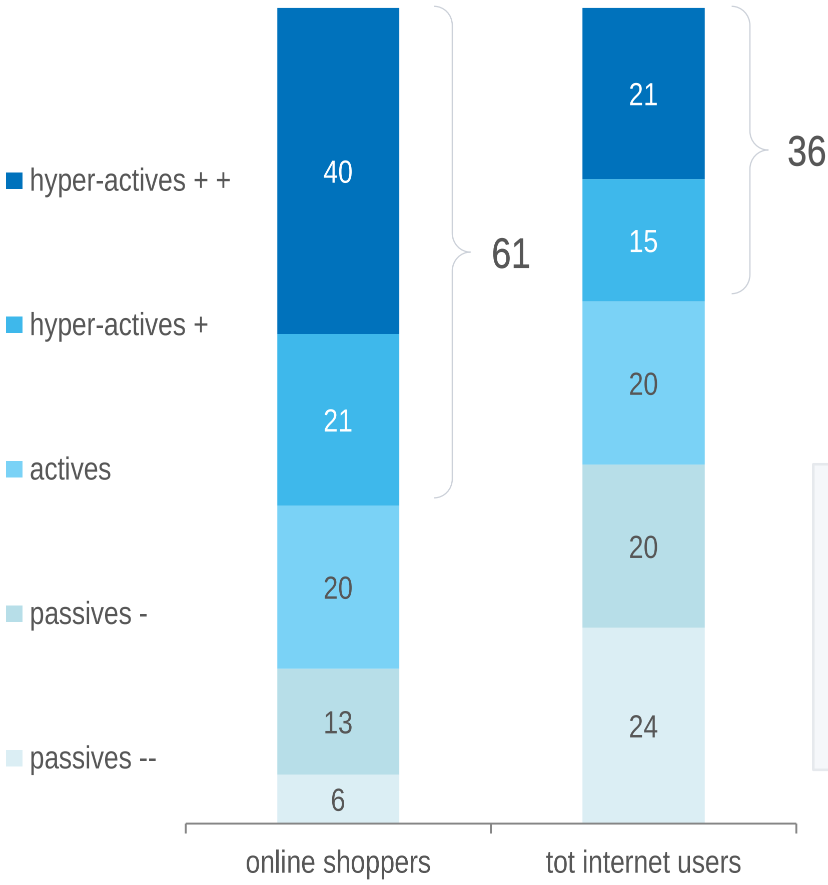


Sample: Online shoppers n=501 (50% of internet users) / tot Internet users 16-65 y.o. n=1,004

	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU Benchmark (of tot internet users) 1st %
Streaming a film, etc.	55	46	UK: 51
Looking for info about something after seeing it on TV	50	38	ES: 47
Using a smartphone in a store to look for info/compare prices	65	46	IT

ONLINE SHOPPERS VS. INTERNET USERS: MORE INTERACTIVE ON THE WEB
Year 2017

INTERACTIVITY CLUSTERS
%



61% of online shoppers are "hyper-active users"

	online shoppers	tot internet users
DII Digital Interactivity Index	54.2	41.9

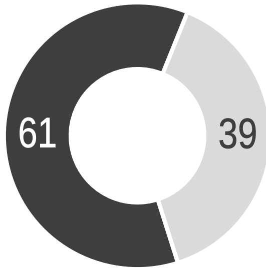
Sample: Online shoppers n=501 (50% of internet users) / tot Internet users 16-65 y.o. n=1,004

	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU Benchmark (of tot internet users) 1st %
Hyper actives	61	36	ES: 57

WHO ARE ONLINE SHOPPERS?

ONLINE SHOPPERS %

MALE
Total internet users 51%
Total population 16-65: 50%



FEMALE
49% Total internet users
50% Total population 16-65

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

Sample: Online shoppers n=501 (50% of internet users) / tot Internet users 16-65 y.o. n=1,004

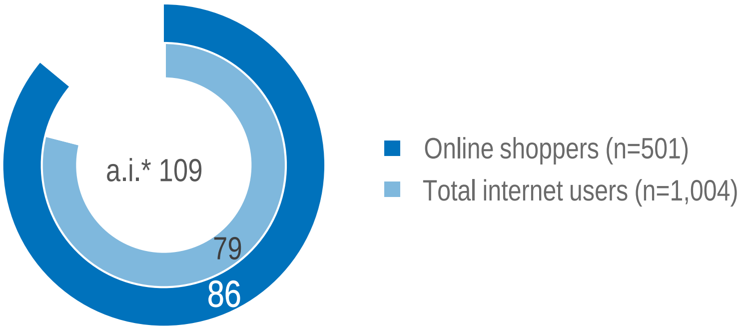
CHAPTER 3

Digital strategy

DIGITAL ENGAGEMENT (DIRECT MARKETING)

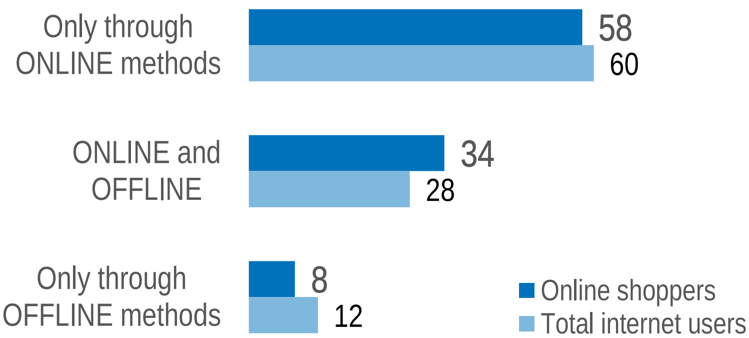
NEWSLETTER SUBSCRIBERS

%



How did you subscribe to these newsletters?

%



86%
of online shoppers subscribe to at least one newsletter (13,800,000 ind.)

58%
of online shoppers who use newsletters subscribe to them using only online methods

61%
of online shoppers who use newsletters trust the content of the newsletter they receive

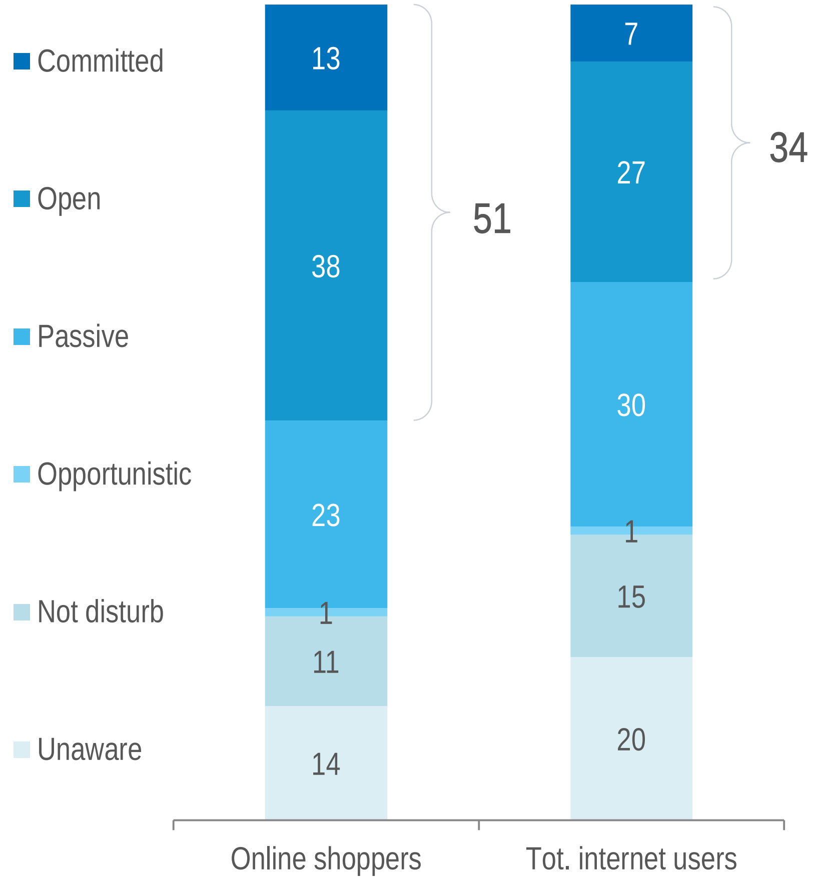
Sample: Online shoppers and newsletter users n=430 (43% of internet users) / newsletter users n=802 (80% of internet users)

THE NEWSLETTER ATTITUDE:	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU Benchmark (of tot internet users) 1st %
Newsletter subscribers	86	79	DE: 82
	=100	=100	=100
Trust newsletter content (very + somewhat)	61	60	UK: 71
Tailored newsletters contents (very + somewhat agree)	44	41	UK: 56
Willingness to provide more personal information to get most relevant messages (very + somewhat agree)	44	37	UK: 44

*Affinity index = % target/ % total *100

OPPORTUNITY TO ENGAGE ONLINE SHOPPERS VIA DIRECT COMMUNICATIONS (NEWSLETTERS)

CLUSTERS BASED ON THE "DIRECT OPPORTUNITY INDEX" *
%



51%
of online shoppers are committed or open to brands' communications through newsletters

	Online shoppers	Tot. internet users
DOI Direct Opportunity Index	52.8	45.9

Sample: Online shoppers n=501 (50% of internet users) / tot Internet users 16-65 y.o. n=1,004

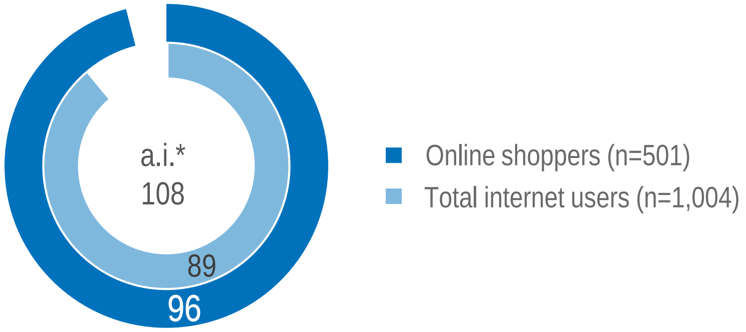
	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU Benchmark (of tot internet users) 1st, %
Committed + open	51	34	UK: 35

*For further information about this analysis see page 40 "DIGITAL INDEXES BY E+DBS17"

SOCIAL NETWORKING AND BRAND INFLUENCE

SOCIAL NETWORK USERS

%



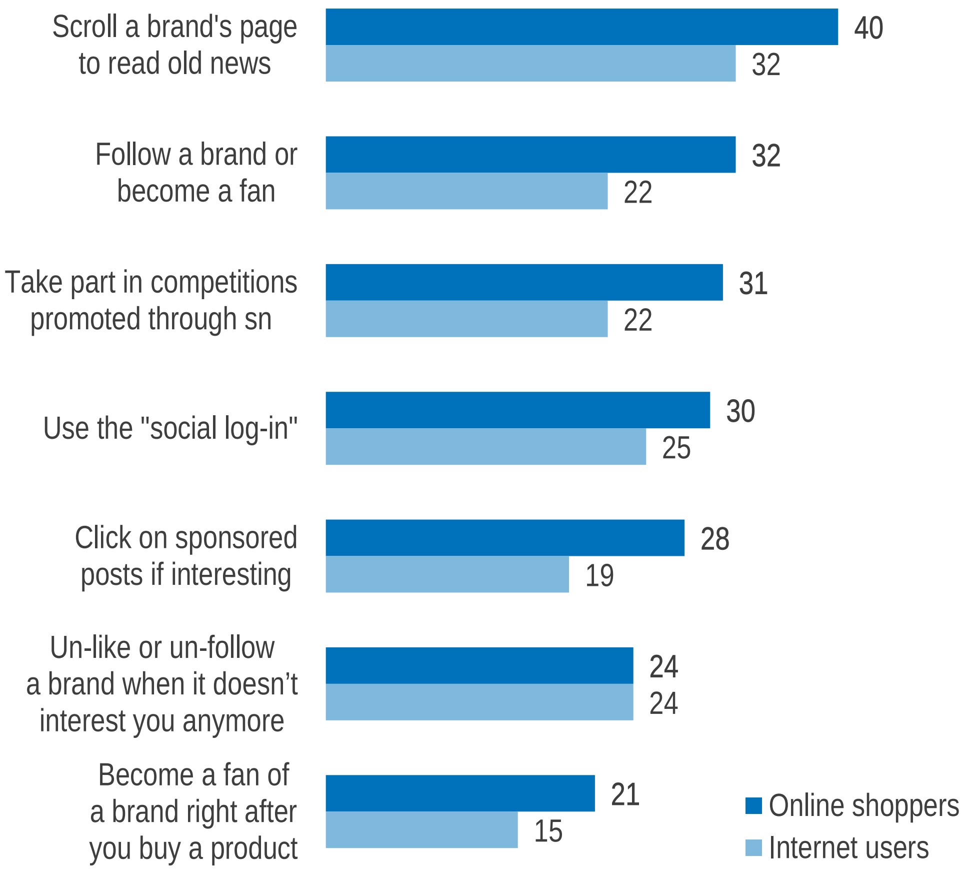
96%
of online shoppers are social network users (15.5 mln ind.)

32%
of online shoppers who use social networks follow brands on social media (4.9 mln ind.)

28%
of online shoppers who use social networks click on sponsored posts if interesting (4.3 mln ind.)

With regards to brands on social networks, do you ever perform the following actions?

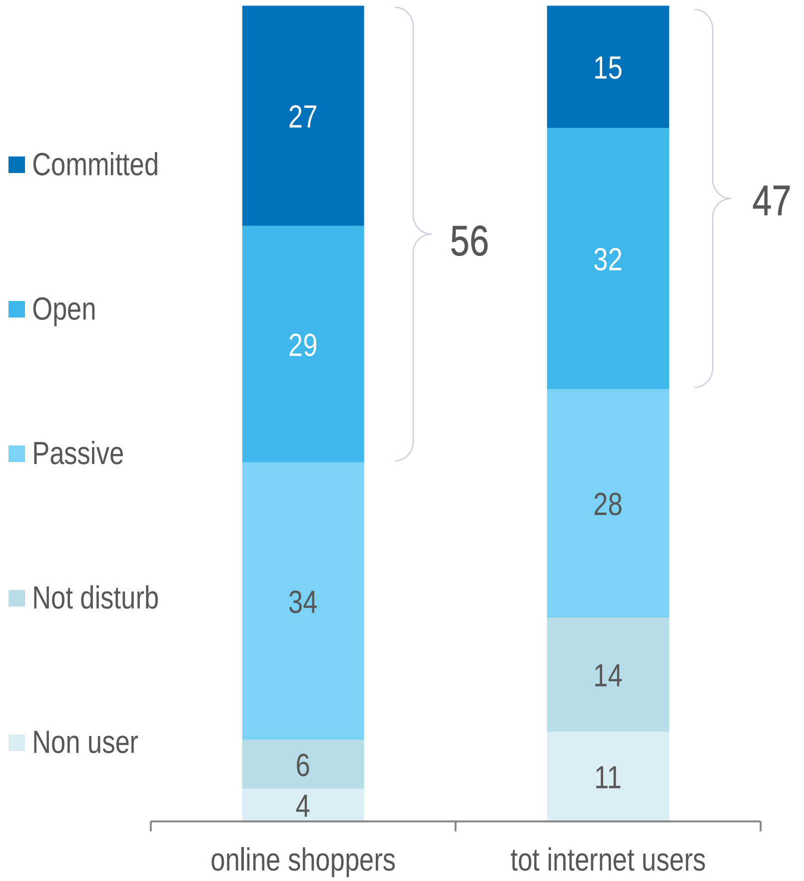
%



Sample: online shoppers and social network users n=482 (48% of internet users), social network users n=892 (89% of internet users)
*Affinity index = % target/ % total *100

A HIGH OPPORTUNITY TO ENGAGE ONLINE SHOPPERS VIA SOCIAL NETWORKS

CLUSTERS BASED ON THE "SOCIAL OPPORTUNITY INDEX" *
%



	online shoppers	tot internet users
SOI Social Opportunity Index	27.5	21.5

56% of online shoppers are **highly active** social media users

Sample: Online shoppers n=501 (50% of internet users) / tot Internet users 16-65 y.o. n=1,004

	Online shoppers (n=501, 50%) %	Total internet users (n=1,004) %	EU Benchmark (of tot internet users) 1st %
Committed + open	56	47	IT, ES: 47

*For further information about this analysis see page 40 "DIGITAL INDEXES BY E+DBS17"

E+DBS17

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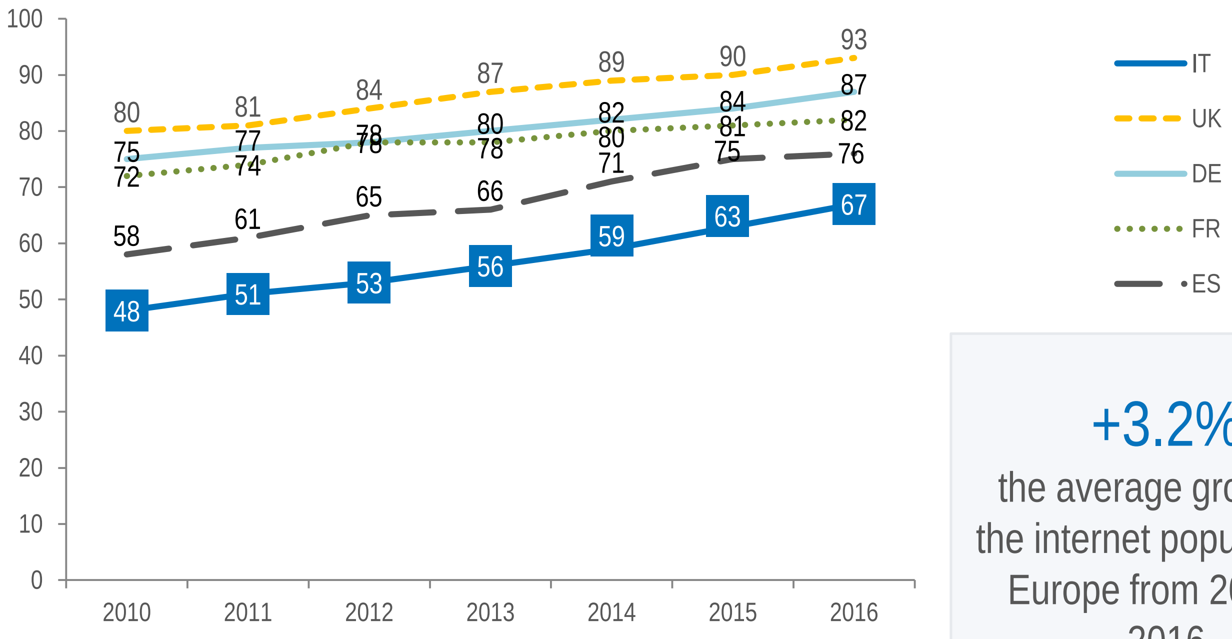
Online trends 2017

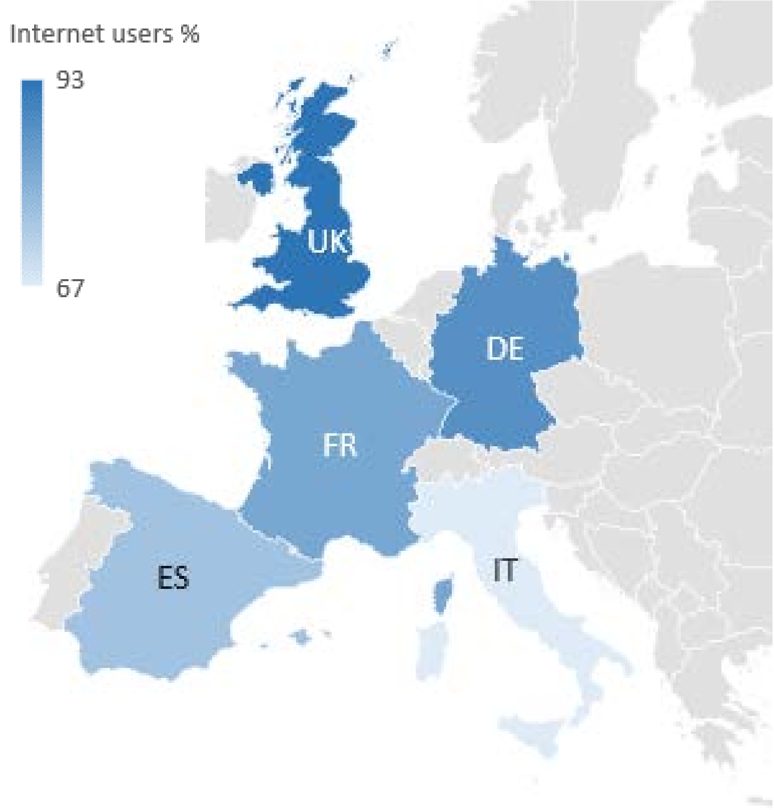
THE DISTRIBUTION OF THE INTERNET IN EUROPE
- Eurostat Data/Information Society processed by Contactlab

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



+3.2%
the average growth of the internet population in Europe from 2015 to 2016

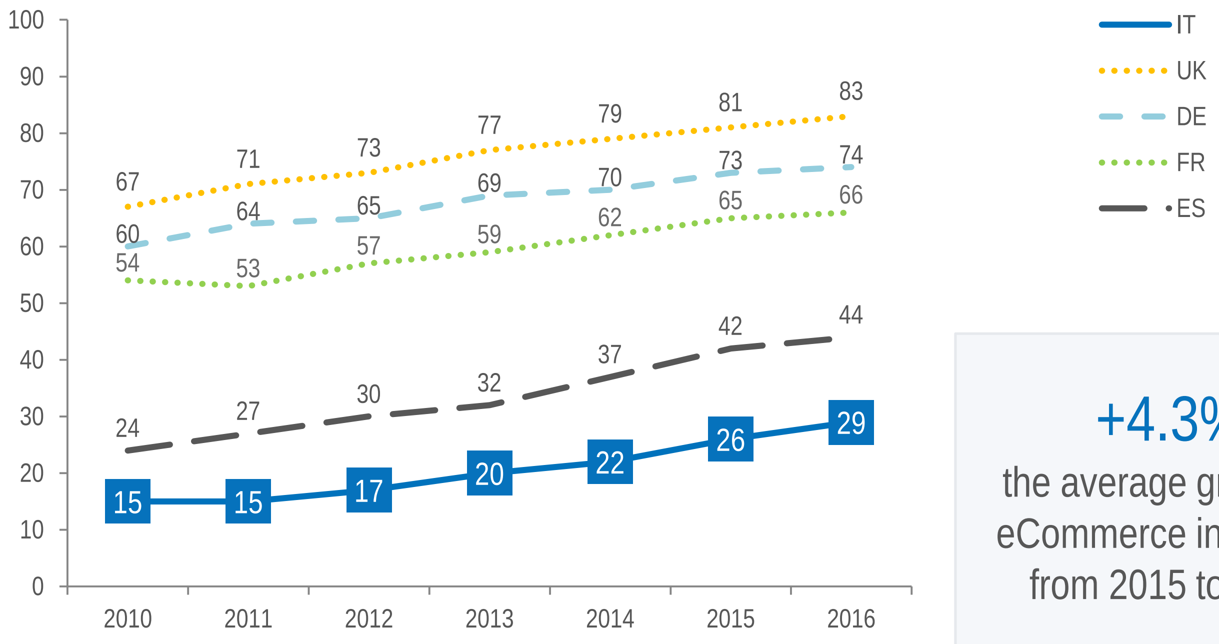
EUROPEAN COMPARISON



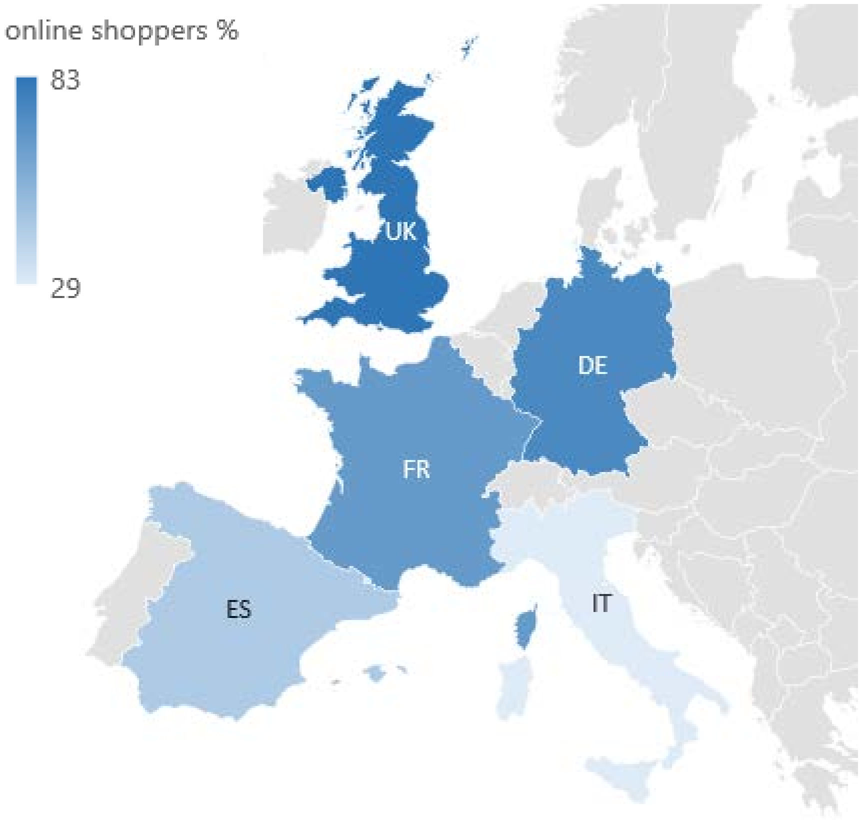
67%
Italian internet penetration among 16-74 y.o in 2016

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

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



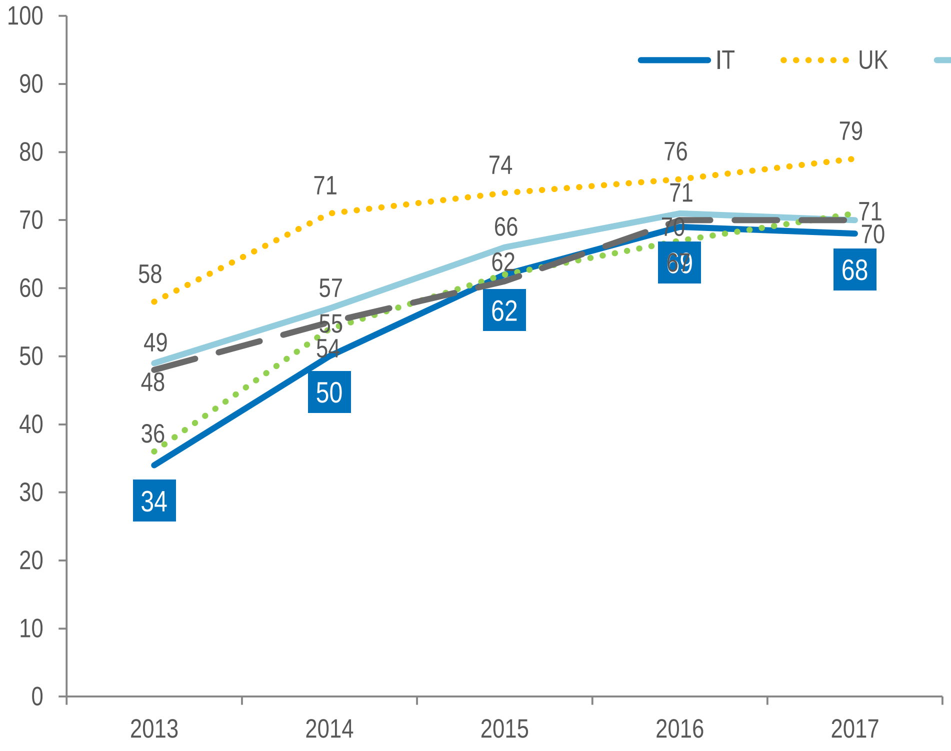
+4.3%
the average growth of eCommerce in Europe from 2015 to 2016



29%
of Italians aged 16-74 are online shoppers

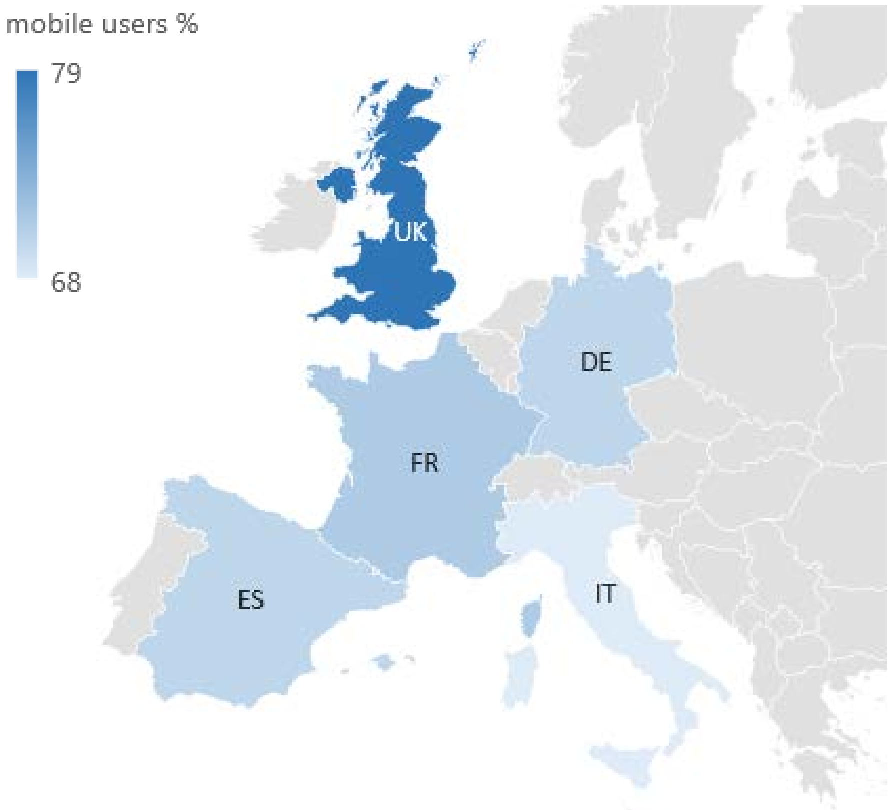
THE DISTRIBUTION OF MOBILE IN EUROPE
E+DBS17 by Contactlab

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



+1.4%

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

Sample: 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

Sample: internet users 16-65 y.o.

CROSS-BORDER ONLINE SHOPPING BY E+DBS17

PENETRATION, REASONS FOR PURCHASING ABROAD AND CEFI INDEX

	IT	UK	DE	FR	ES
Cross-border shoppers (out of 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
TOP 3 reasons for buying abroad (sample: 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 measures each country's 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 of personal data, uniqueness of 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

1st GERMANY	27.8
2nd SWITZERLAND	27.0
3rd USA	23.3
4th FRANCE	22.3
5th 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.