



e-commerce
PARIS 2013
THE CROSS-CHANNEL EVENT



avec

Réussir son e-commerce européen



Susanne Czech, Secretary General, **EMOTA**



Jean Rémi Gratadour, Délégué général, **ACSEL**



James Roper, Chairman & Founder, **IMRG**



Christoph Wenk-Fischer, Chief Executive, **BVH**



Johan Eriksson, Business Developement, **Svensk Distanshandel**



Thierry Petit, fondateur, **Showroomprivé**



Jörgen Bødmar, Founder, **Scandinavian Design Centre**



Le 26 septembre 2013



UK & Cross-Border Trading

James Roper, Chairman & Founder, IMRG



To-do list



- **UK e-Retail overview**
- **Cross-Border developments**
- **Action plan**

IMRG's 1,300 Members

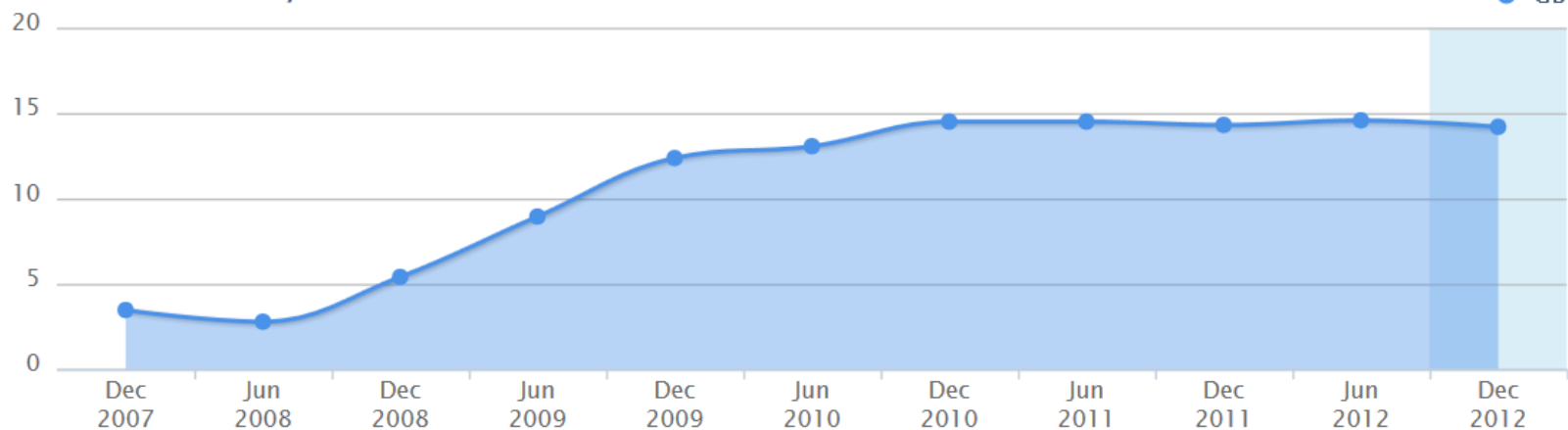


Daniel & Hulme
TO LET
RETAIL UNIT
1374 SQ FT

14.2% ▼

Shop Vacancy (GB)
December 2012

Historical vacancy



Total E-retail Market - Month on Month

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the voice of e-retail

Capgemini
CONSULTING TECHNOLOGY SERVICES

e-Retail Sales Index

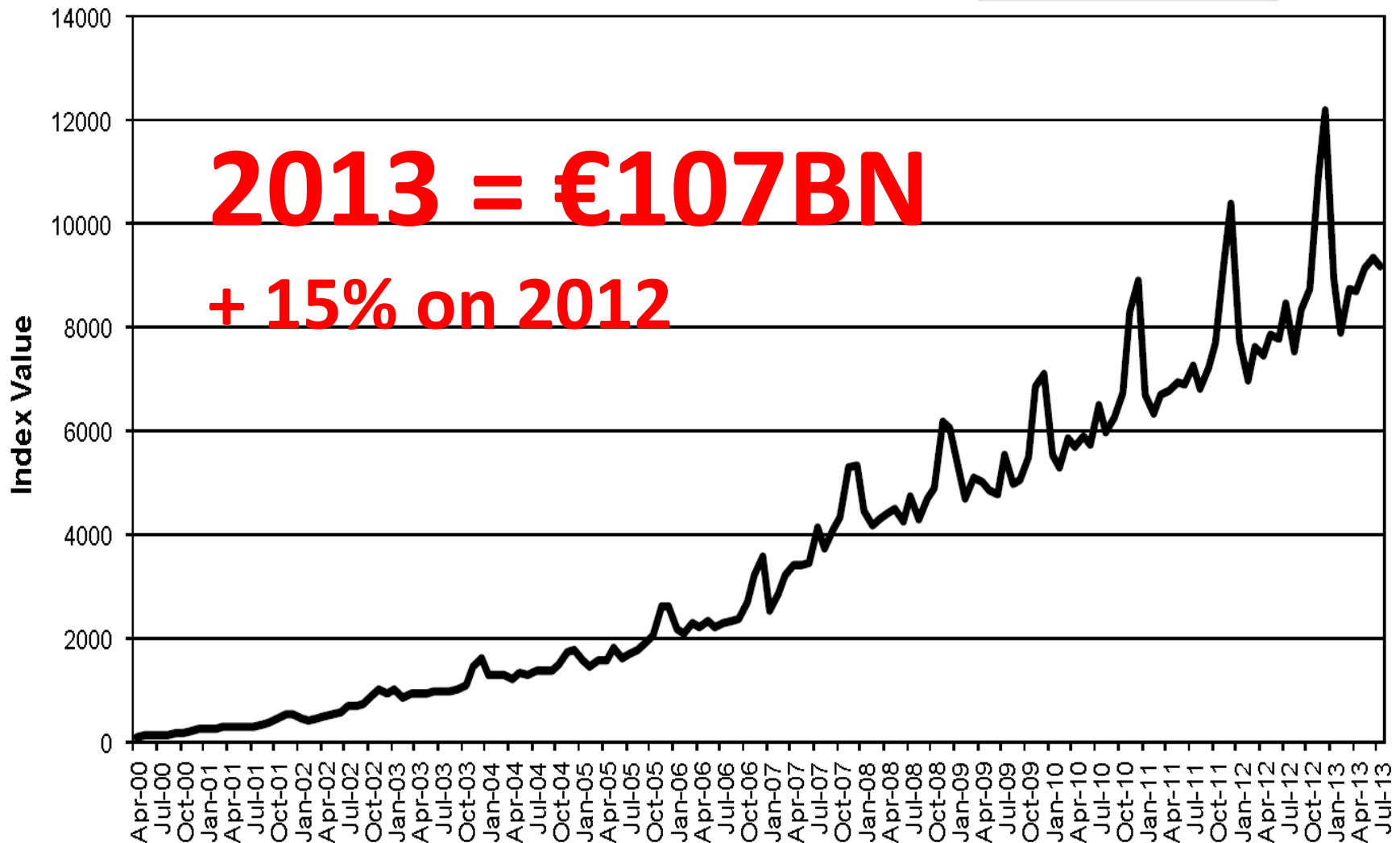
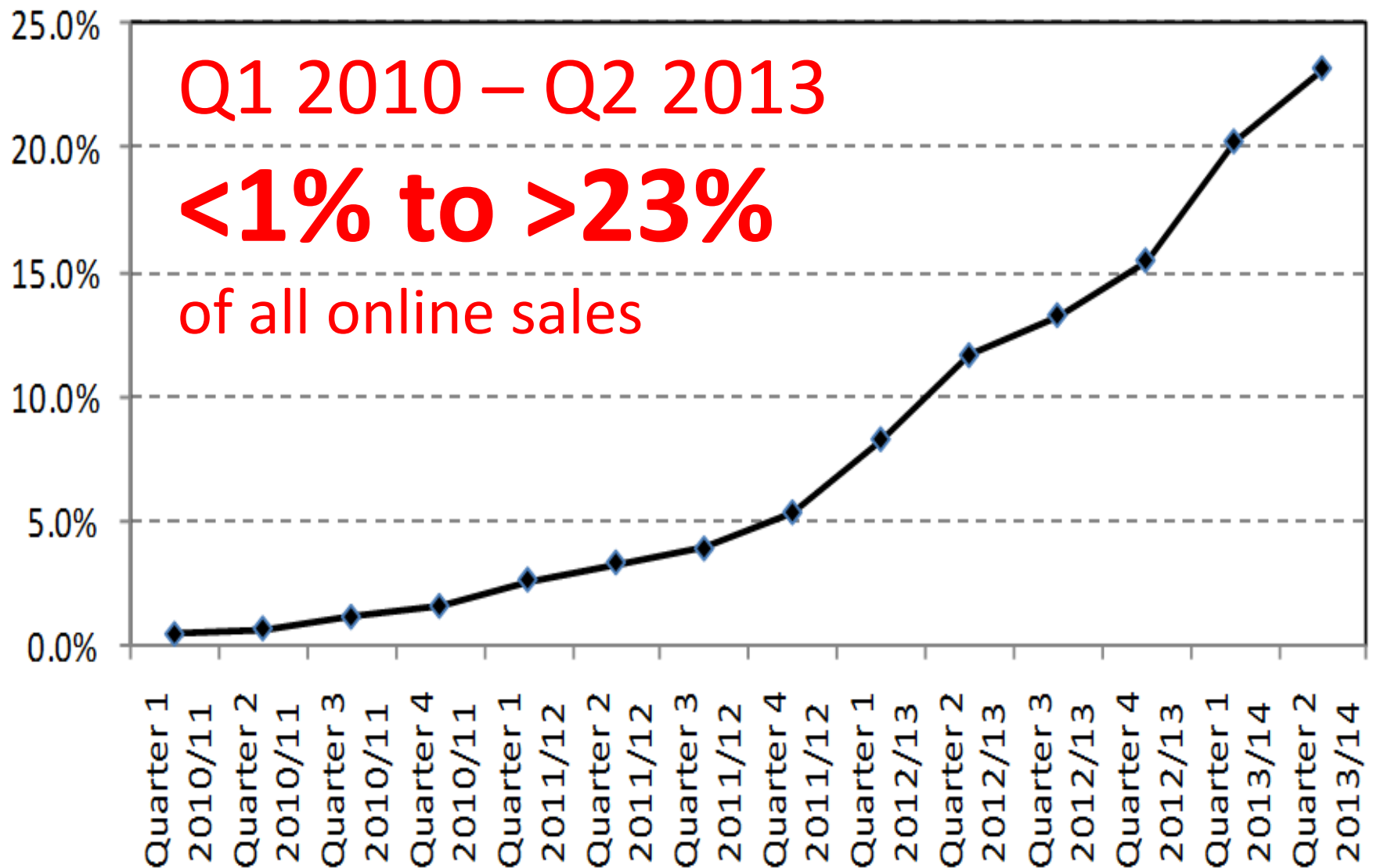


Chart 1: This chart shows UK online shopping sales from April 2000 to July 2013

Average percentage of sales via mobile



Mobile = all UK retail growth

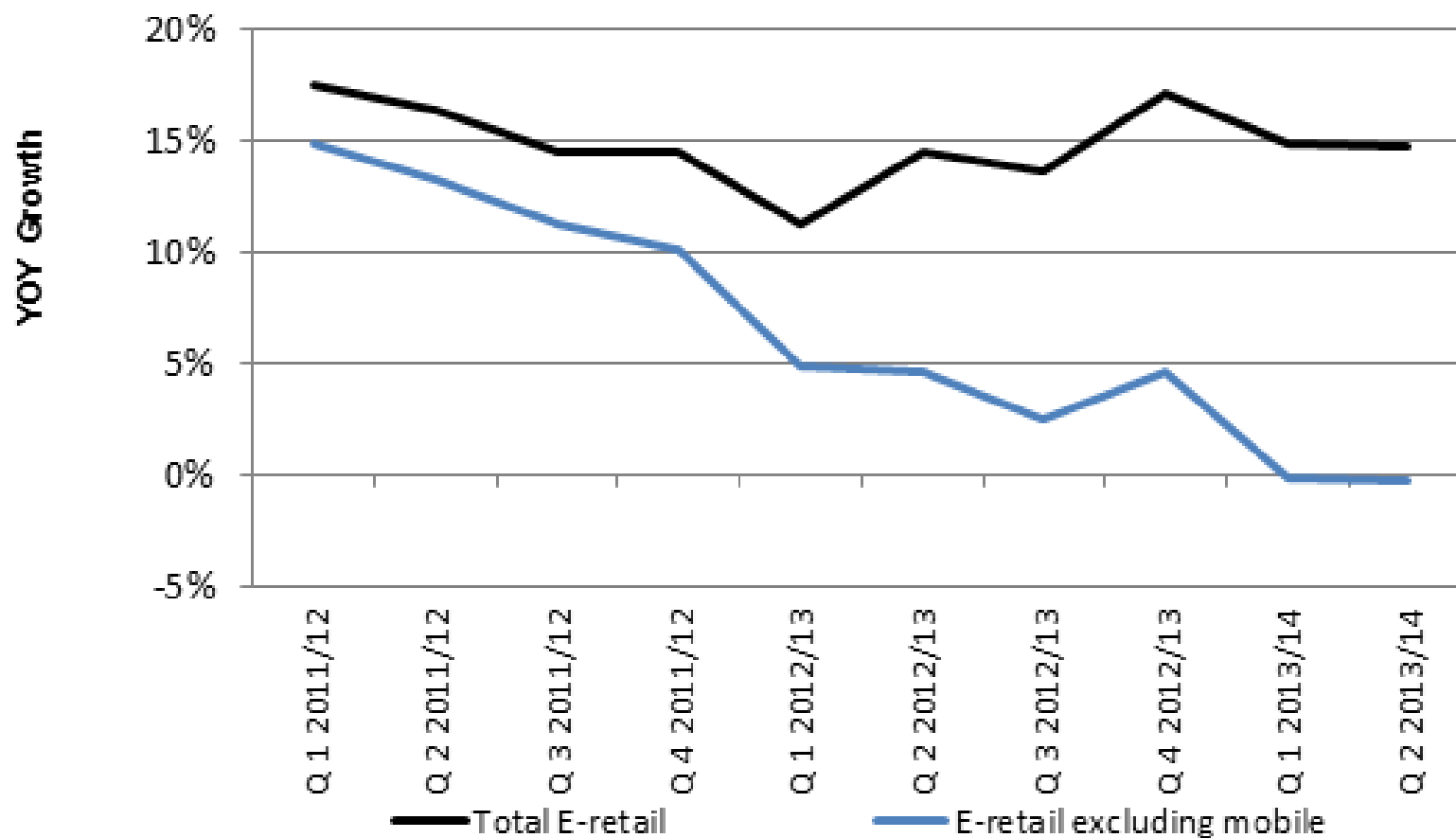


Year on Year Growth: Total e-Retail & e-Retail excluding mobile

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m-Retail Sales Index





Total E-Retail Market - Monthly Average Basket Value of Participants (Excluding Travel)

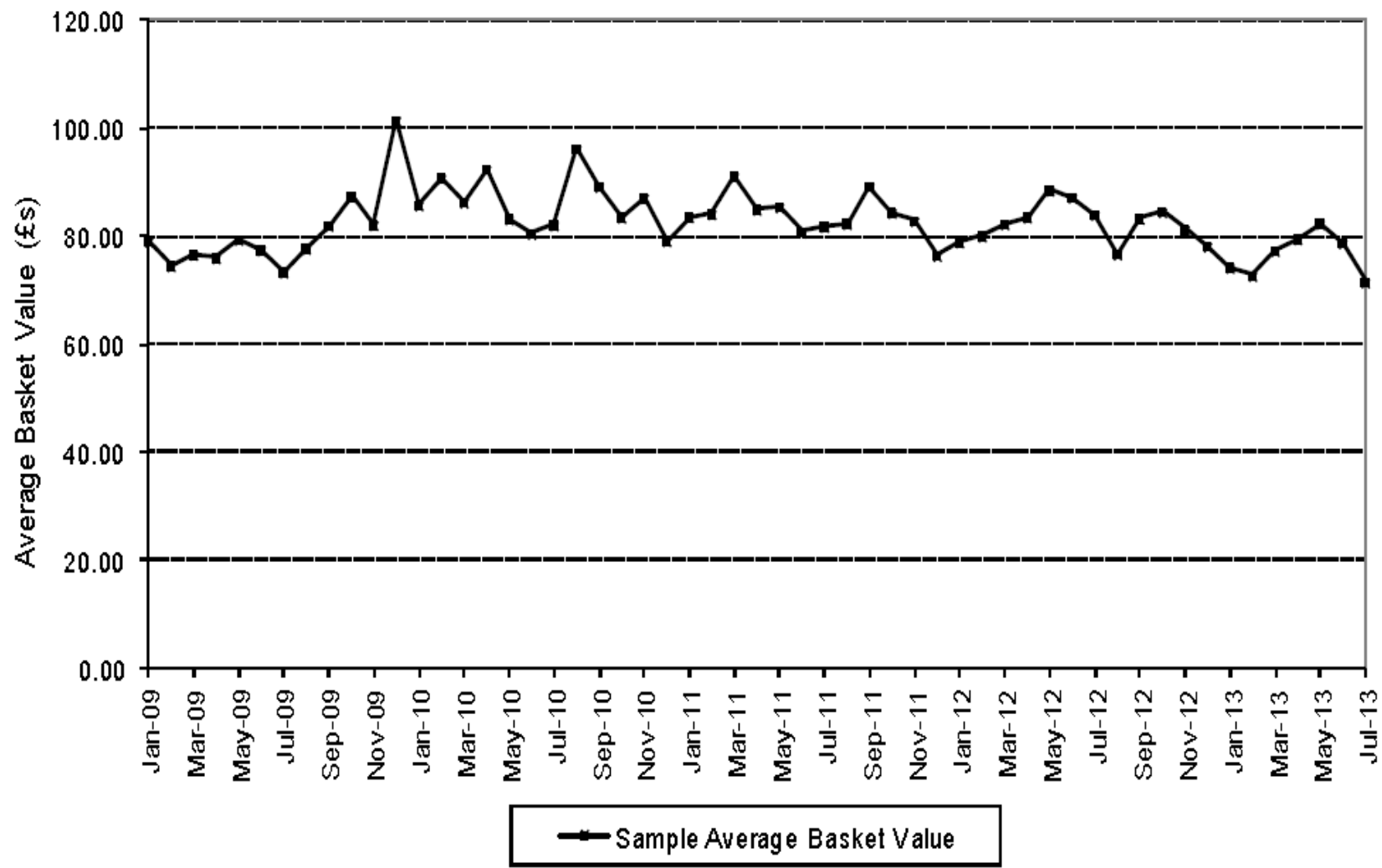


Chart 13: This chart shows the overall total market (excluding Travel) monthly average basket value from January 2009 to July 2013

<u>Sector</u>	<u>% Change Year-on-Year July 2013</u>	<u>% Change Month-on- Month (June to July 2013)</u>	<u>Average Basket Value July 2013</u>	<u>Average Basket Value Change year-on- year</u>	<u>Average Conversion Rate July 2013</u>	<u>Average YOY Growth in 12 month period August 2012 to July 2013</u>
Total Market	+9%	-2%	£118	-19%	4.7%	+15%
High St / Multichannel	+6%	-1%	£153	-23%	3.9%	+14%
Online-only / Catalogue	+13%	-3%	£91	-10%	5.4%	+17%
E-retail Sales (exc Travel)	+10%	-2%	£72	-15%	4.9%	+16%
Beer, Wine, Spirits	+23%	-2%	£104	-43%	N/A	+10%
Clothing, Footwear, Accessories	+10%	+1%	£55	+8%	5.1%	+17%
Accessories	+47%	-8%	£46	+48%	N/A	+40%
Footwear	+13%	-11%	£57	0%	2.5%	+13%
Womenswear	+6%	-9%	£66	-3%	N/A	+20%
Menswear	+7%	-18%	£63	-7%	N/A	+26%
Electricals	+2%	-8%	£168	-4%	N/A	+12%
Gifts	+12%	-9%	£39	+17%	N/A	+26%
Health & Beauty	+3%	-6%	£42	+5%	N/A	+11%
Lingerie	+48%	-10%	£36	+4%	N/A	+33%
Travel	+3%	-2%	£942	-10%	N/A	+12%
Home & Garden*	+51% (LFL +37%)	-11%	£80	-22%	1.9%	+51% (LFL +29%)

Chart 3: This table shows the Index sector results for July 2013

Réussir son e-commerce en Europe, 25 septembre 2013

16%

The percentage of click & collect e-retail sales for multichannel retailers

35%

The average checkout abandonment rate

23.2%

The percentage of gross revenue derived from paid marketing

£6.48

The average ROI per pound spent on PPC marketing

23.2%

e-Retail sales via mobile devices (inc tablets)

19%

The percentage of units returned reached a record high in Q2

28.5%

The average active customer retention rate

27.2%

The percentage of gross orders generated from natural marketing

23.7%

The percentage of gross revenue generated from direct marketing

3.9%

The percentage of orders cancelled due to fraud

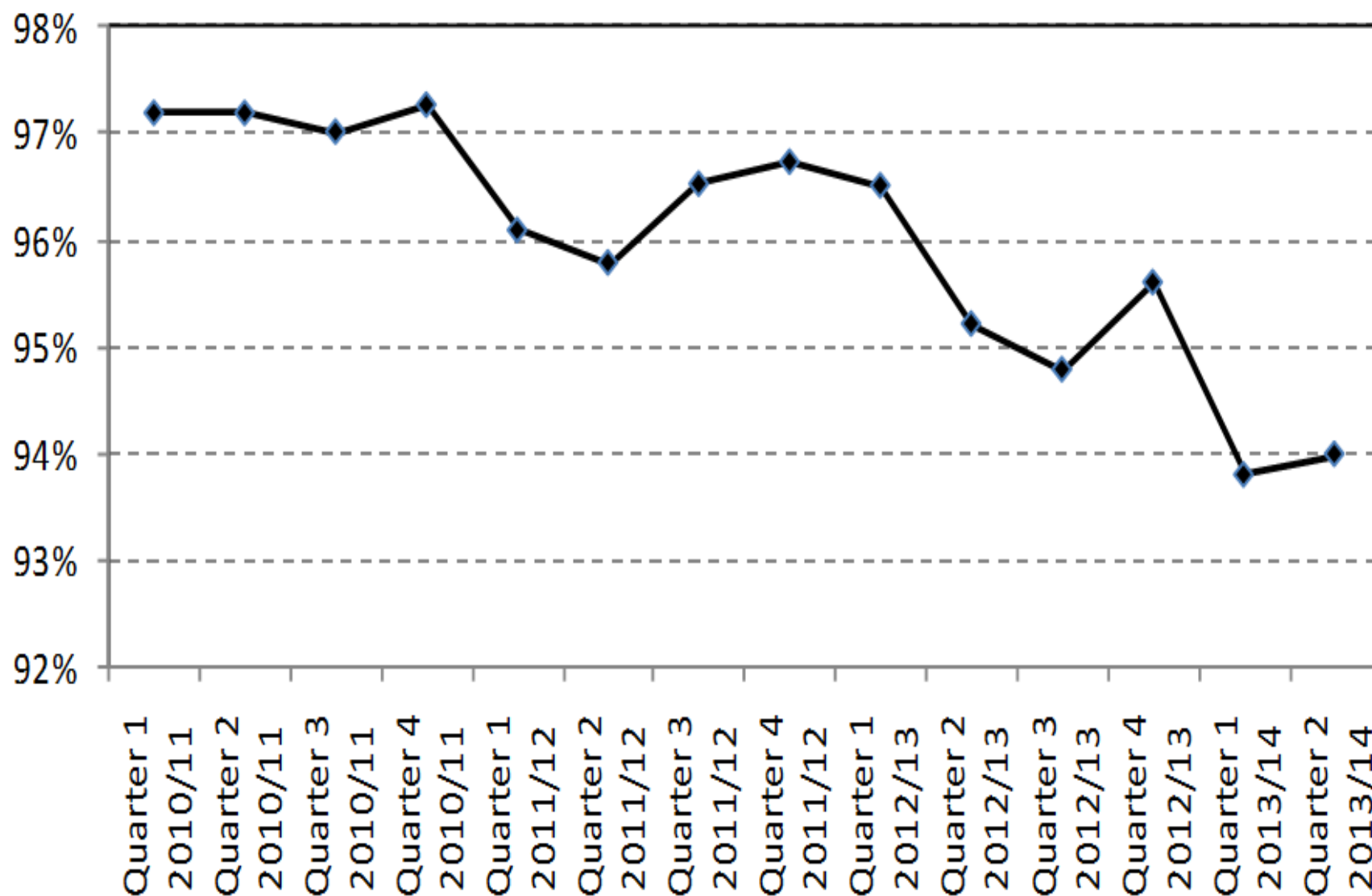
Global X-border trade

2013: €100 billion

2018: €300 billion

- 120 million people will shop X-B this year
- 20% annual growth rate of global X-B sales
- 160 million X-B parcels will ship out of UK in 2013
- Alibaba.com, Amazon.com, eBay, Rakuten... dominating the market
- Many challenges remain: visibility, trust, logistics, regulations, fraud.....

Average percentage of sales within the UK





UK Retail Industry – International Action Plan

Driving global growth
for the UK retail industry

www.ukti.gov.uk



IMRG X-border
Trading Guide 2013

International Developments in e-Commerce



- £1,000 +VAT
- Free-of-charge to IMRG Members

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This report looks at the practical steps British e-retailers and facilitators can take now to improve their cross-border trading performance and profitability, suggesting a top 20 list of countries to consider targeting and shares tips on what is most likely to work when trading with consumers cross-border. The report also contains an updated list of the world's leading 55 B2C e-commerce countries, together with the value of their 2012 online sales and growth rates.

- Practical, usable advice
- Top 20 countries to target
 - where trade is already good
 - promising, emergent, fast-growing markets
- 55 leading e-retail countries
 - sales values
 - % growth rates

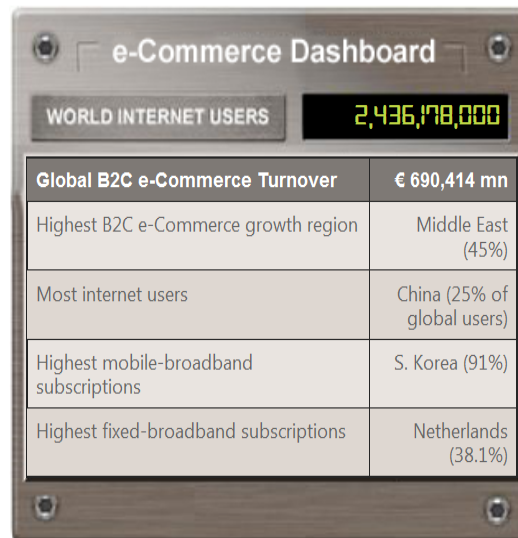
IMRG X-Border Top 20 Targets



IMRG X-B Rank	COUNTRY	€M 2012 online sales	% increase 12 on11	Online as % of total retail	Ease of doing business world ranking*	Trading across borders world ranking*
1	USA	257,000	15%	10%	4	22
2	Australia	23,610	11%	6%	10	44
3	China	145,230	55%	5%	91	68
4	Russia	10,035	27%	2%	112	162
5	Germany	37,300	26%	5%	20	13
6	France	43,600	21%	5%	34	27
7	Turkey	3,300	32%	1%	71	78
8	Ireland	3,800	20%	1%	15	28
9	Poland	4,355	29%	2%	55	50
10	Brazil	9,320	25%	4%	130	123
11	Saudi Arabia	816	42%	1%	22	36
12	Canada	16,268	18%	10%	17	44
13	Sweden	8,938	14%	10%	13	8
14	Netherlands	10,080	12%	10%	31	12
15	Ukraine	1,282	78%	2%	137	145
16	India	10,040	40%	1%	132	127
17	South Korea	12,740	6%	15%	8	3
18	Japan	87,580	13%	9%	24	19
19	Portugal	1,090	16%	1%	30	17
20	Italy	9,500	19%	1%	73	55

* Source: World Bank

IMR Smart is the definitive resource for global e-commerce intelligence and data. With an interactive database containing the most up-to-date and reliable data on global e-commerce, IMR Smart enables users to build up an in-depth understanding of how different countries and regions are developing and provides invaluable support for retailers looking to progress their business strategies.



Demographics

- ✓ Rationalise e-commerce potential through population data.
- ✓ Browse 10 years of demographic trends and fluctuations.
- ✓ Compare preferences and behaviours among gender and age groups.

Global e-Business Intelligence



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 Switzerland	 United Kingdom

We share the Knowledge Base with international sister associations who provide and maintain information about their own countries





UK and Cross-Border Trading

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the voice of e-retail