



GERMANY IS THE LARGEST ECOMMERCE MARKET IN CENTRAL EUROPE, WITH A POPULATION OF 70.5 MILLION INTERNET USERS.^{1*}

* AT THE CURRENT RATE OF NEW TECHNOLOGY ADOPTION AND EXPLOSIVE GROWTH IN ONLINE PURCHASING BY CONSUMERS, BY 2023 EVERY FOURTH EURO WILL BE SPENT ONLINE — AN EXPANSION OF ALMOST 250 PERCENT²

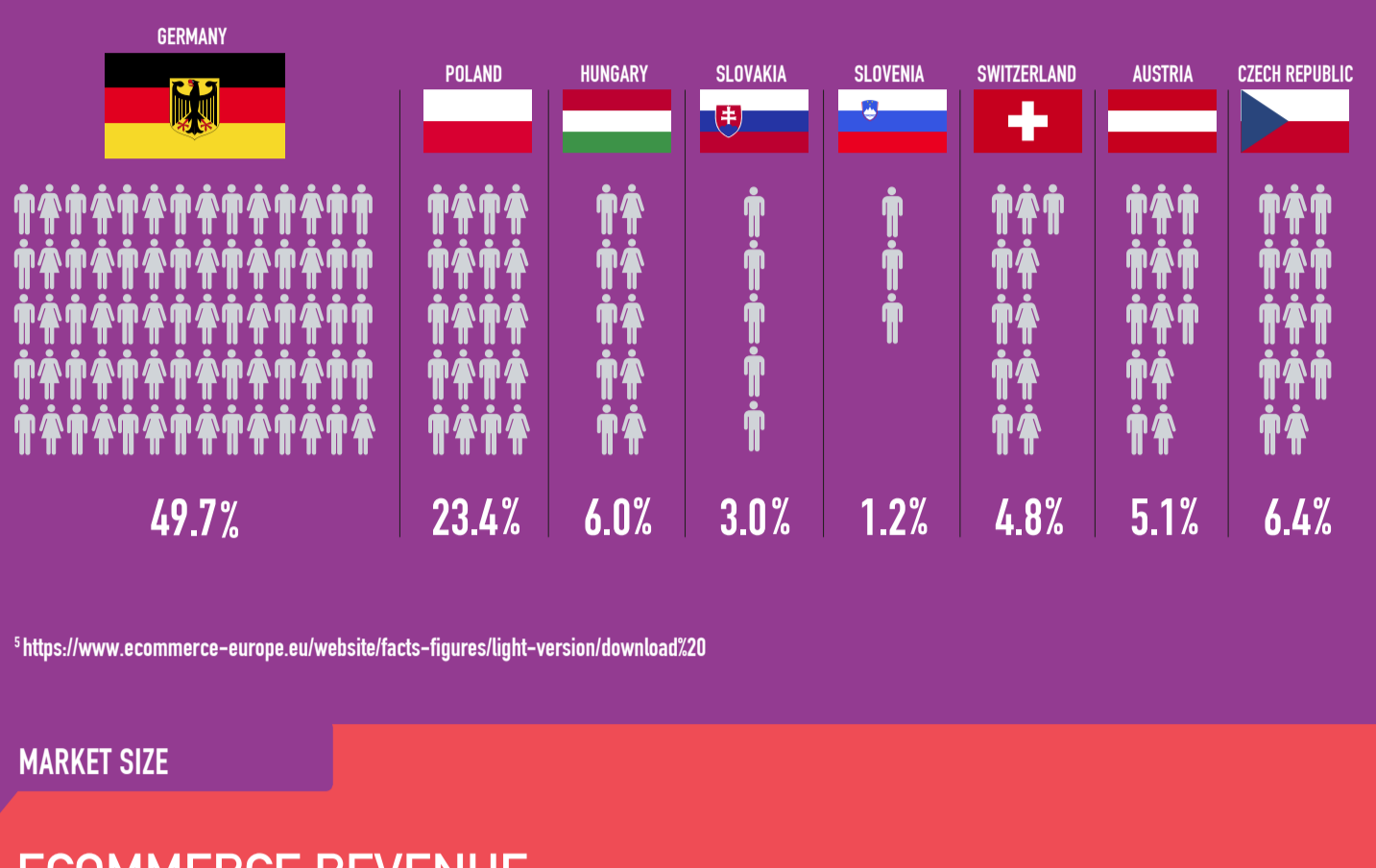
GERMAN ECONOMY

+ PROJECTED

MARKET SIZE // Current and Projected Growth

42 MILLION GERMAN CONSUMERS, OR 52% OF THE TOTAL POPULATION, PURCHASED GOODS OR SERVICES ONLINE IN 2013.³

Annual and projected ecommerce growth from 2012–2017⁴



¹ http://www.gtai.de/GTAI/Content/EN/Invest/_ShareDocs/Downloads/GTAI/Fact-sheets/Business-services-ict/fact-sheet-e-commerce-en.pdf
² <http://www.statista.com/statistics/241442/b2c-e-commerce-sales-growth-in-germany/>

GERMAN ECONOMY

MARKET SIZE // Central Europe

WITH A POPULATION OF 82 MILLION PEOPLE, GERMANY LEADS ALL CENTRAL EUROPEAN NATIONS IN POPULATION, B2C ECOMMERCE AND IS THE LARGEST ECONOMY IN EUROPE.⁵

European Union nations percent share of Central European population, 2013⁵



⁵ <https://www.ecommerce-europe.eu/website/facts-figures/light-version/download/20>

MARKET SIZE

ECOMMERCE REVENUE

GERMAN ECOMMERCE TURNOVER GREW MORE THAN 40% FROM 2012 TO 2013, AND IS EXPECTED TO GROW AN ADDITIONAL 25% IN 2014.⁶



B2C ECOMMERCE SALES IN GERMANY FOR 2012–2013 (2014–2017 FORECAST)^{7*}

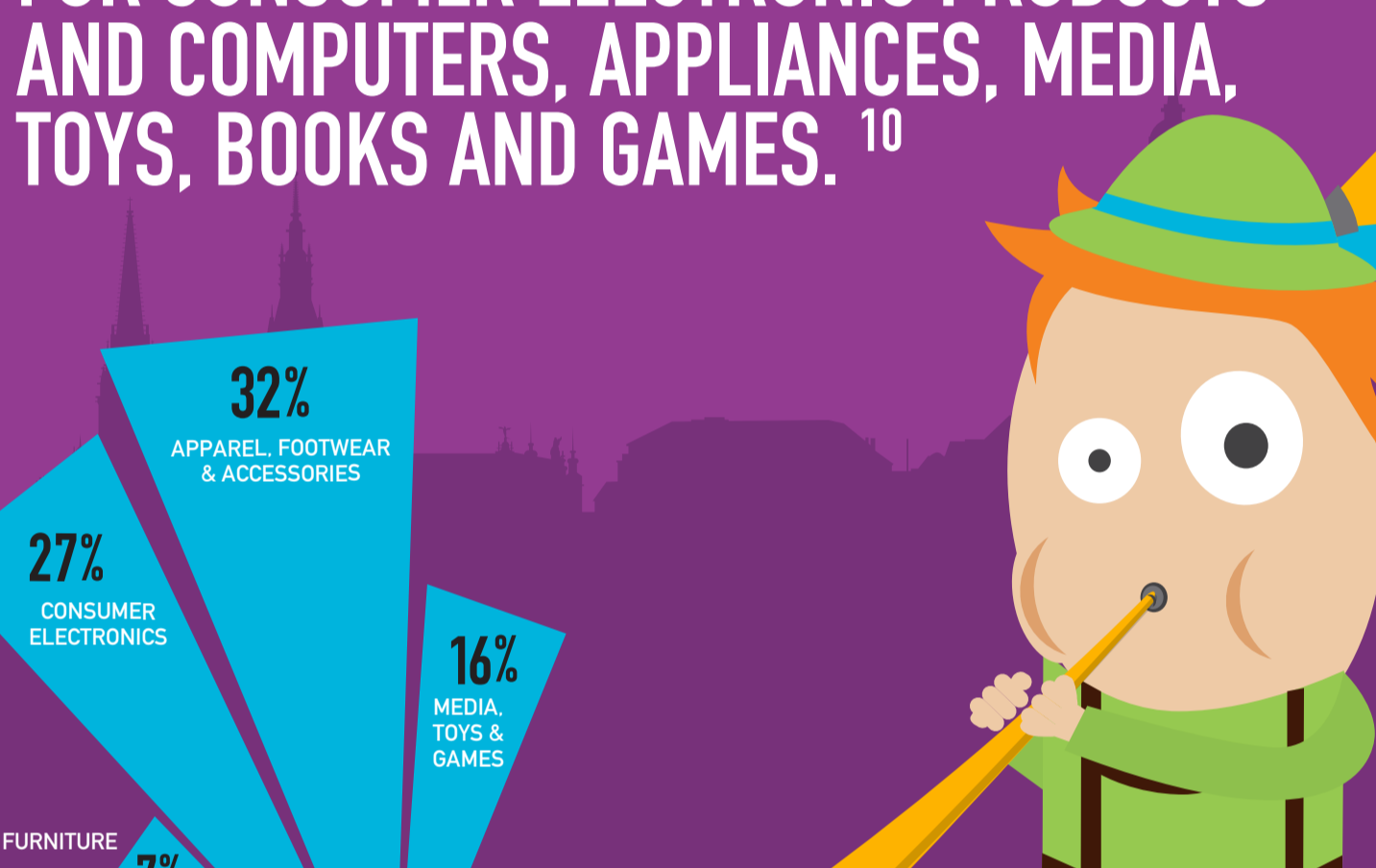


⁶ <http://www.gtai.de/GTAI/Navigation/EN/Invest/Industries/Digital-economy/e-commerce.html?view=renderPrint>
⁷ <http://www.statista.com/statistics/280178/b2c-e-commerce-sales-in-germany>

COMMERCE EXPERIENCE

MOBILE SHOPPING

AT THE END OF 2013, 50% OF ALL GERMANS OWNED A SMARTPHONE. 40% OF ALL SMARTPHONE USERS USE THE DEVICE FOR ONLINE PURCHASES.⁸



Providing users the benefit of anytime–consumer interaction, 30 million smartphone and 115 million mobile subscriptions are expected to be purchased in 2014, creating turnover of EUR 9.3 billion (up 10 percent compared to 2013).⁹

⁸ <https://www.ecommerce-europe.eu/website/facts-figures/light-version/download/20>
⁹ The Paypers, Country Report Germany 2013

PRODUCT CATEGORIES

BY ONLINE RETAIL SALES

ONLINE SHOPPING IS MAINLY RESERVED FOR CONSUMER ELECTRONIC PRODUCTS AND COMPUTERS, APPLIANCES, MEDIA, TOYS, BOOKS AND GAMES.¹⁰



¹⁰ AT, Kearney, November 2013

GERMAN CULTURE

CONSIDERATIONS

GERMANS HAVE THE HIGHEST RATE OF RETURNING GOOD PURCHASES ONLINE, 42% OF SHOPPERS WANT THE ABILITY TO BUY ONLINE AND RETURN ITEMS IN-STORE.¹¹

Germans prefer to research their potential purchases thoroughly. They have no problem letting others know who offers what: 35% of German consumers are likely to share their shopping experience via post-sale feedback, consumer review sites and other channels.¹²



¹¹ http://www.consumerinsights.com/insights/online_shopping/German-Consumers-Want-Choices-And-Convenience-When-Shopping-Online
¹² www.internetretailer.com/commentary/2014/05/05/e-commerce-opportunities-europes-strongest-economy

GERMAN CULTURE

BUYING BEHAVIOR OR CONSIDERATIONS

GERMAN CONSUMERS TURN TO A VARIETY OF SOURCES WHEN MAKING PURCHASING DECISIONS.¹³



¹³ Digitalization Thinklab, Marketing Center Münster – Roland Berger Strategy Consultants: Research Report #2, German Digitalization Report, 2014. (PDF accessed 8/23/14)

LOCAL SNAPSHOT

BUYING STATISTICS

CONSUMERS WHO MADE AT LEAST ONE ONLINE PRODUCT PURCHASE WITHIN THE LAST 30 DAYS (MOBILE & PC)¹⁴



51.6 MILLION GERMAN INTERNET USERS HAVE MADE AT LEAST ONE ONLINE PURCHASE¹⁵

91% OF GERMANS AGES 30 – 49 BUY ONLINE USING A DIGITAL DEVICE OR PC.¹⁶

¹⁴ GlobalWebIndex, February 2014
¹⁵ The Paypers Country Report Germany 2013

COMMERCE EXPERIENCE

FACT // World Cup 2014

GERMANY, WINNER OF THE 2014 WORLD CUP, SAW AN AVERAGE 75% INCREASE IN ONLINE TRANSACTIONS MADE THE DAY AFTER EACH OF THEIR VICTORIES.¹⁷



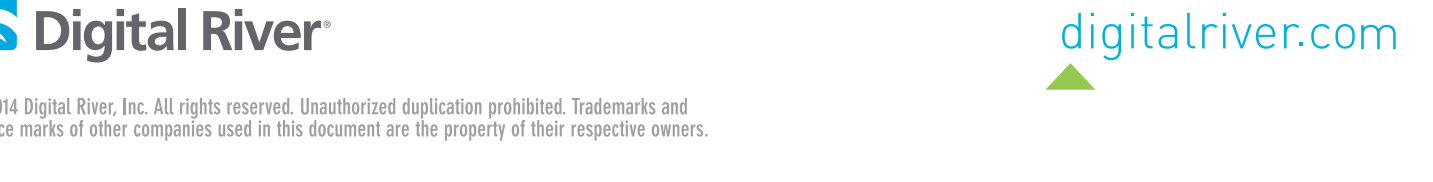
FACT: The German national soccer team won the FIFA World Cup in 1954, 1974, 1990 and 2014.¹⁸

¹⁷ <http://mobilemarketingmagazine.com/infographic-world-cup-affected-ecommerce-sales>
¹⁸ <http://www.fifa.com/associations/association=ger>

SHOPPING BEHAVIOR

PAYMENTS

58% OF GERMAN ONLINE SHOPPERS PREFER TO BE INVOICED FOR THEIR HIGH-PRICED ITEMS, AN INVOICE IS THEN PAID FROM THEIR BANK ACCOUNTS.¹⁹



CREDIT CARDS ARE NOT A DOMINANT PAYMENT METHOD, DUE TO CULTURAL AVERSION OF CONSUMER DEBT. AS A RESULT ONLINE PAYMENT SERVICES LIKE PAYPAL, SOFORT, CLICKANDBUY AND GIROPAY ARE PREFERRED BY 40% MORE PEOPLE THAN CREDIT CARDS.¹⁹

¹⁹ www.internetretailer.com/commentary/2014/05/05/e-commerce-opportunities-europes-strongest-economy
²⁰ http://www.gtai.de/GTAI/Content/EN/Invest/_ShareDocs/Downloads/GTAI/Fact-sheets/Business-services-ict/fact-sheet-e-commerce-en.pdf