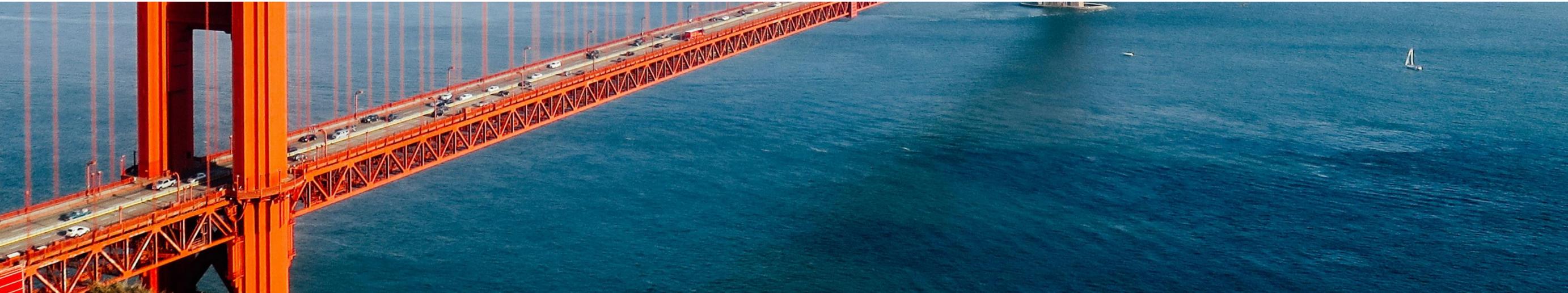


Ecommerce Report: USA

2019

LIGHT REPORT



Thank you for reading this report

Thank you for downloading this report. We hope that it will help you take the next step towards selling online in the USA.

The Ecommerce Foundation is an independent organization initiated by worldwide national ecommerce associations as well as online and omnichannel companies from industries such as retail, travel and finance. Our **mission** is to **foster global digital trade**, since peace is the natural effect of trade. By facilitating digital commerce, we hope to make the world a slightly better place.

If you like our reports, please visit our report page on www.EcommerceWiki.org. On this page, you will find a large collection of free **Ecommerce Country Reports**.

Valued Report Partners



SAP Customer Experience is a business unit of SAP. It provides omnichannel customer engagement and commerce solutions that allow organizations to build up a contextual understanding of their customers in real-time, deliver a more impactful, relevant customer experience and sell more goods, services and digital content across every touch point, channel and device. Through its state-of-the-art customer data management, context-driven marketing tools and unified commerce processes, SAP Customer Experience has helped some of the world's leading organizations to attract, retain and grow a profitable customer base.



Asendia is one of the world's top three international mail, shipping and distribution organizations, delivering your packages, parcels and documents to more than 200 destinations across the globe.

It combines the experience and expertise of its founding companies, La Poste and Swiss Post. As a joint venture, it brings together a wealth of international and local expertise and connections. Today, Asendia employs over 1,500 people in fifteen country offices across Europe, Asia and the USA – a global network blended with a local presence.



.shop is a domain name for ecommerce. Short, meaningful and relevant, .shop allows ecommerce businesses to choose a brandable online address that instantly identifies ecommerce websites to online shoppers around the world. A .shop domain name can also help offline retailers and service providers to be discoverable online. For businesses, .shop domain names are a more powerful marketing tool and can be used to distinguish their corporate website from their online shop, providing an enhanced user experience for their customers.



Valued Report Partners



Manhattan Associates is a technology leader in supply chain and omnichannel commerce. It unites information across the enterprise, converging front-end sales with back-end supply chain execution. Its software, platform technology and unmatched experience help drive both top-line growth and bottom-line profitability for its customers.

Manhattan Associates designs, builds and delivers leading-edge cloud and on-premise solutions so that across the store, through your network or from your fulfilment centre, you are ready to reap the rewards of the omnichannel marketplace.



Computop offers local and innovative omnichannel solutions for payment processing and fraud prevention around the world. For ecommerce, at POS and on mobile devices, retailers and service providers can choose from over 350 payment methods and acquirer connections.

Computop, a global player with locations in Germany, China, the UK and the USA, processes transactions for more than 16,000 retailers annually, such as Bigpoint, C&A, Fossil, illy, Otto Group, Sixt and Swarovski, with a combined value of \$34bn.



Ecommerce Foundation is an independent organization, initiated by national ecommerce associations worldwide and omnichannel-online companies from the retail, travel and finance industries.

Its mission is to facilitate ecommerce through the development of practical knowledge, market insights and services.



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#2 INFRASTRUCTURE & LOGISTICS

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#1

USA OVERVIEW

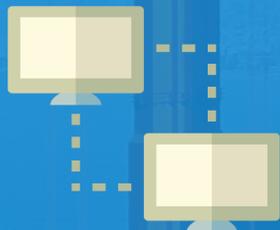
AREA: 3,796,742 km²

CAPITAL: Washington, D.C.

CURRENCY: United States Dollar (USD)



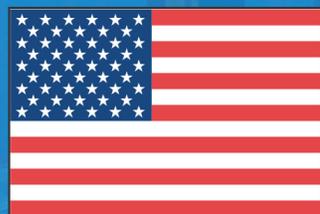
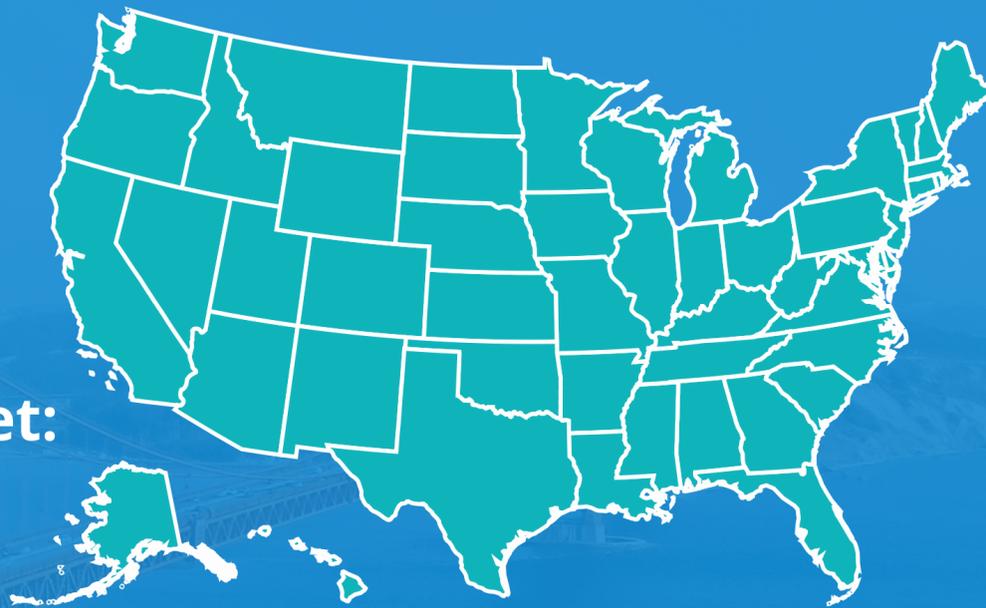
Government:
Federal republic



Internet users (2018):
89%

Main device used for Internet:
Desktop, 48.18%

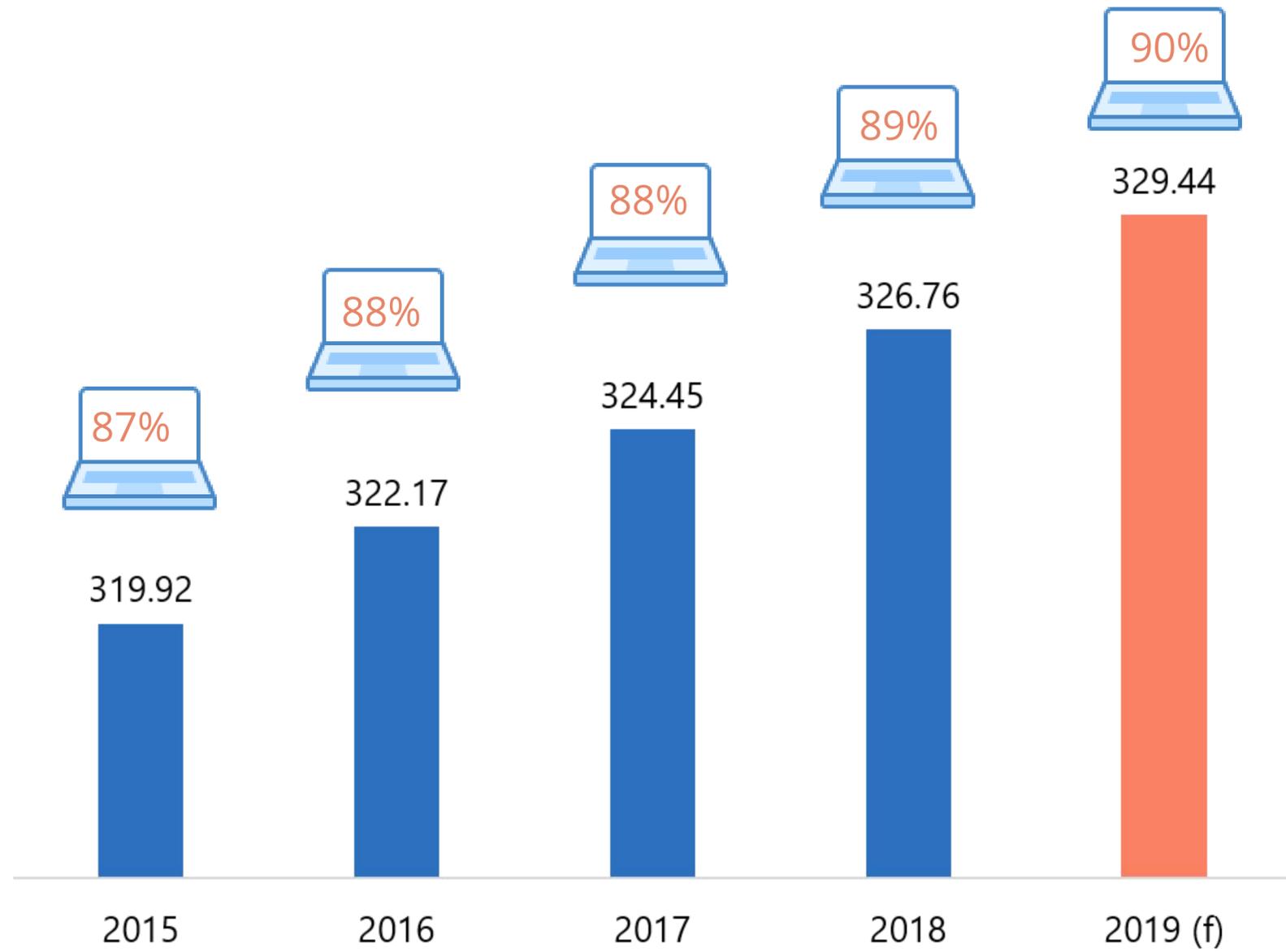
URL country code:
.US



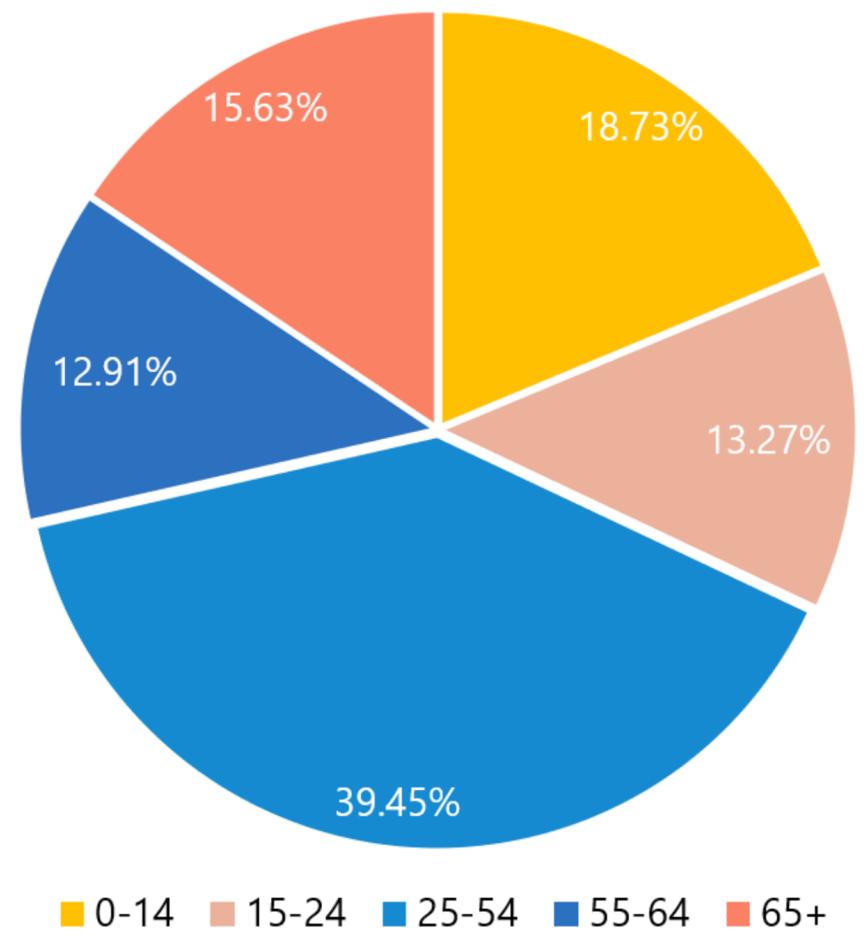
Official language:
English

Most of the population is between 25-54

Population and Internet penetration
 Total population (million) and share of the population using the Internet, 2015-2019 (f)



Age structure
 Share of population in select age ranges, 2018



GDP is expected to increase in 2019

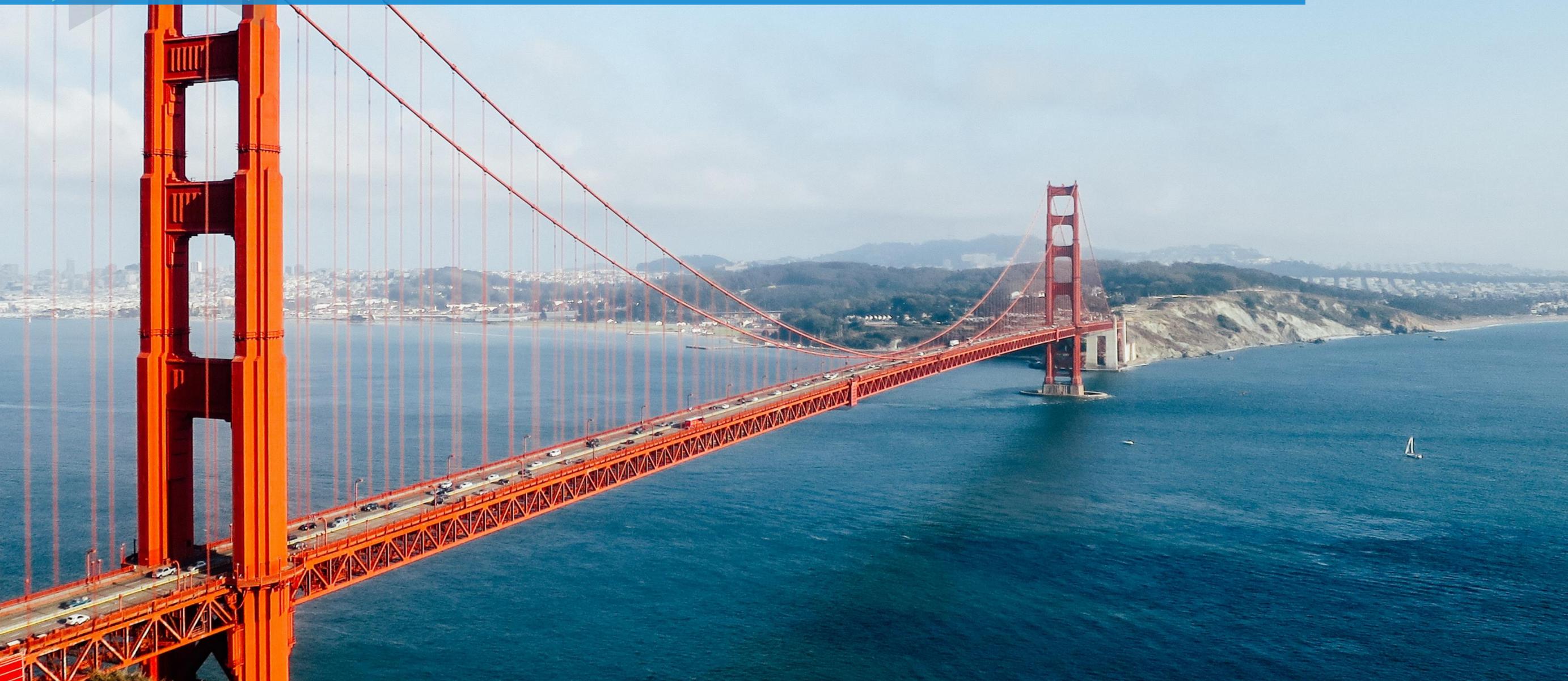
Gross Domestic Product (USD)

GDP, GDP per capita and GDP growth, 2014-2019 (f)

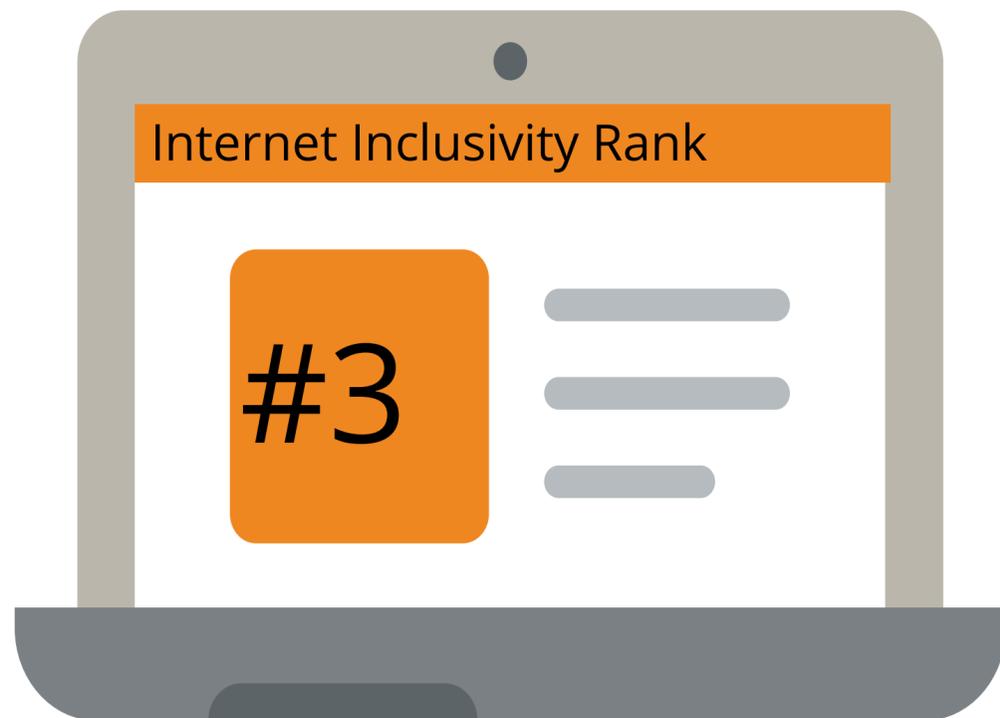
YEAR	GROSS DOMESTIC PRODUCT (GDP), TRILLIONS USD	GROWTH RATE YOY	GDP PER CAPITA, USD
2014	\$ 17.393	4.20%	\$ 54,747
2015	\$ 18.037	3.70%	\$ 56,378
2016	\$ 18.569	2.95%	\$ 57,636
2017	\$ 19.417	4.57%	\$ 59,844
2018	\$ 20.352	4.82%	\$ 62,283
2019 (f)	\$ 21.350	4.90%	\$ 64,805

#2

Infrastructure & Logistics



The USA rank 3rd in the Internet Inclusivity Index



Internet Inclusivity Index

The Index outlines the current state of Internet inclusion across 86 countries. It aims to help policymakers and influencers gain a clearer understanding of the factors that contribute to wide and sustainable inclusion.

Readiness

This category examines the capacity to access the Internet, including skills, cultural acceptance and supporting policy.

Affordability

This category examines the cost of access relative to income and the level of competition in the Internet marketplace.

Relevance

This category examines the existence and extent of local language content and relevant content.

Availability

This category examines the quality and breadth of available infrastructure required for access, as well as levels of Internet usage.

The USA appear to do great in all ecommerce indices



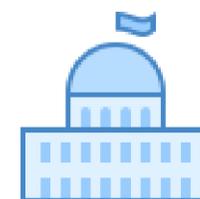
Logistics Performance Index

The LPI overall score reflects perceptions of a country's logistics based on, among other things, efficiency of customs clearance process, quality of trade and ease of logistics services.



Ease of Doing Business Index

A high Ease of Doing Business ranking means the regulatory environment is more favorable for the starting and operation of a local firm. These rankings are determined by sorting the aggregate distance to frontier scores on ten topics.



E-Government Development Index

The UN's E-Government Index provides a comparative assessment of the e-government development of UN Member States. Important factors contributing to a high level of e-government development include concurrent past and present investments in telecommunication, human capital and the provision of online services.



#3

Ecommerce Landscape



B2C ecommerce turnover is expected to reach more than \$547 billion in 2019

B2C ecommerce turnover

B2C ecommerce sales (billion USD) and growth rate, 2015-2019 (f)

The share of the total GDP made up by B2C ecommerce sales continues to increase every year.

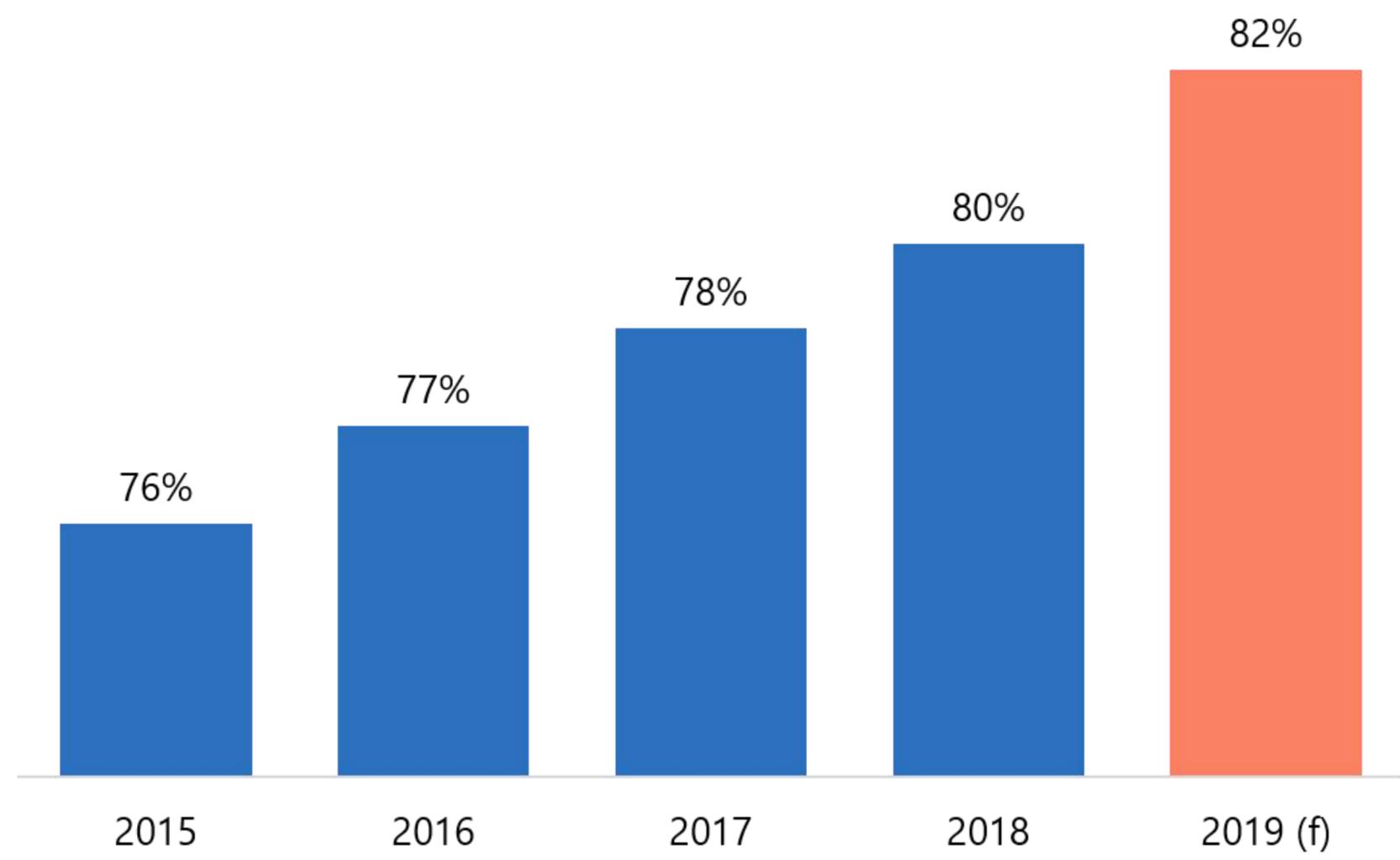
This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

YEAR	E-GDP (share of GDP made up by ecommerce sales)
2014	1.71%
2015	1.90%
2016	2.11%
2017	2.33%
2018	2.56%
2019 (f)	2.57%

82% of the online population is forecast to shop online in 2019

E-Shopper penetration

Share of the online population having shopped online, 2015-2019 (f)



E-Shopper spending

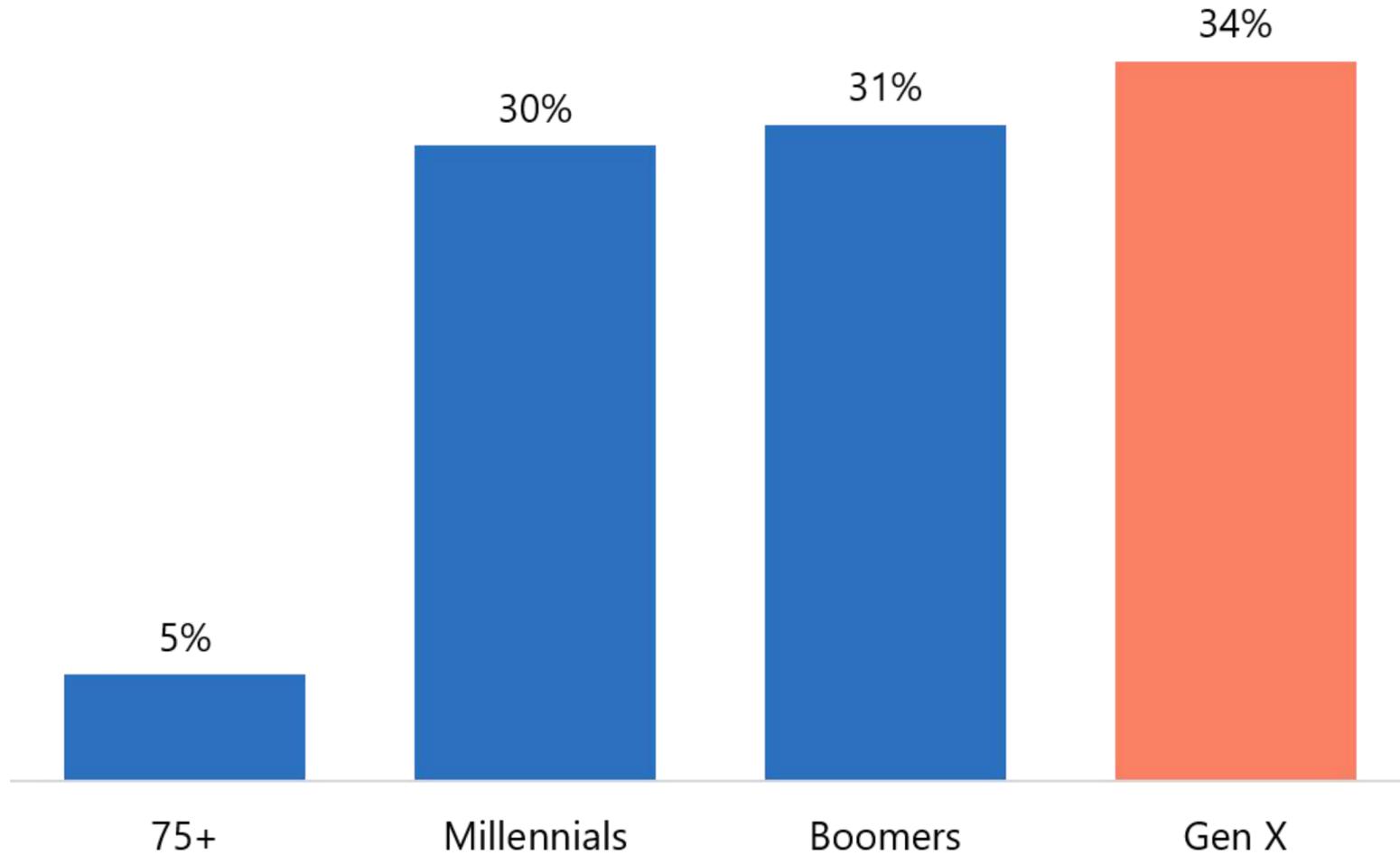
Annual amount spent per e-shopper (USD), 2015-2019 (f)

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Gen X has the highest distribution of online shoppers

E-Shopper penetration

Distribution of online shoppers in the USA by age group, 2018



E-Shopper penetration

Distribution of online shoppers in the USA by gender, 2018

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

41% of female online shoppers buy several times per month

E-Shopper penetration

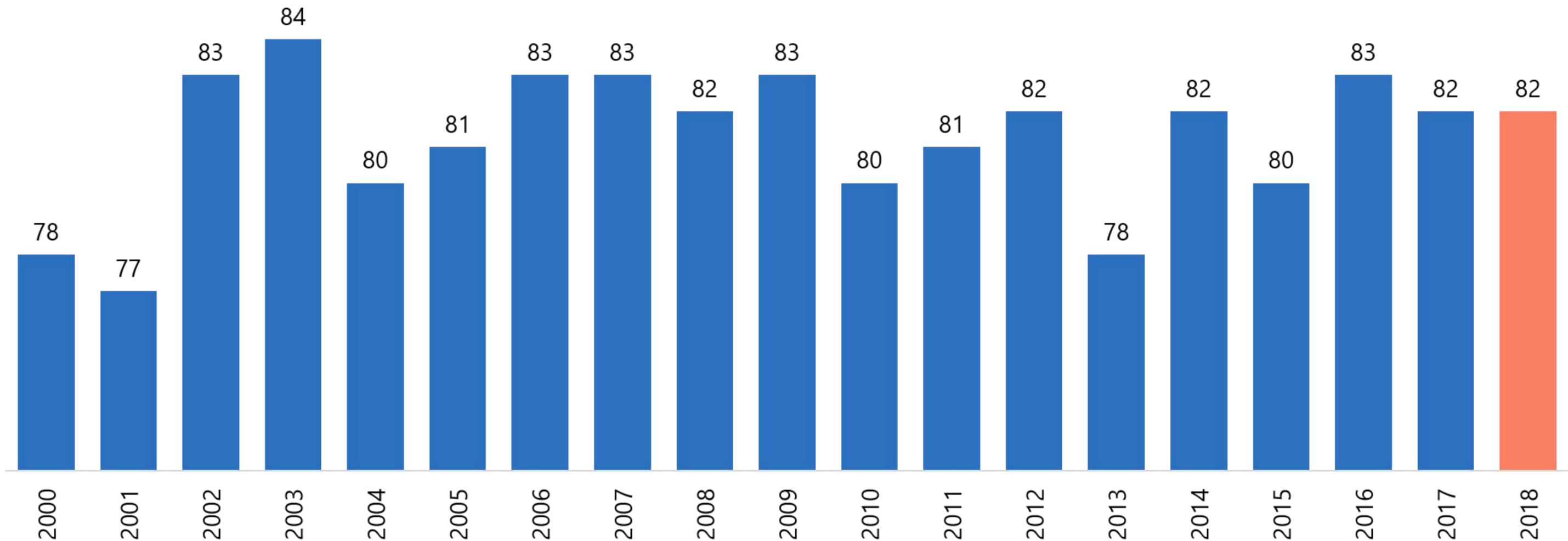
Online shopping frequency of online shoppers in the USA by gender, 2018

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

US customers give an 82 index score related to online retail satisfaction

Consumer behavior

US customer satisfaction with online retail from 2000 to 2018 (index score)



Most US consumers prefer their purchase to be delivered to home

Consumer behavior

Delivery methods used by internet users in the USA for digital purchases by age group, 2018

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

Most US consumers prefer to buy private labels to save money

Consumer behavior

Ways in which internet users in the USA save money during their shopping journey by age group, 2018

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In 2021, 53.9% of online sales are performed through mobile

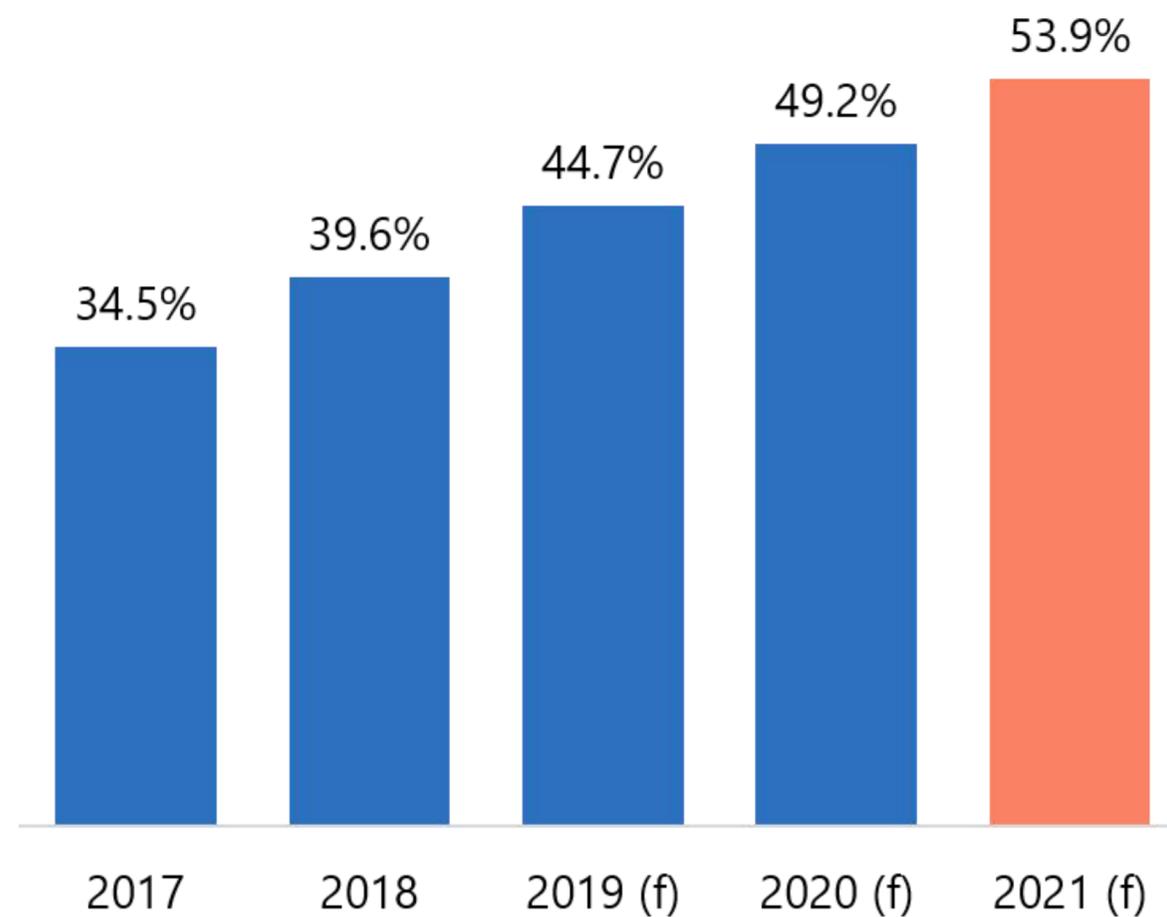
Consumer behavior

Leading payment methods used for online transactions in the USA, 2018

Online shopping

US mobile retail commerce sales as percentage of retail ecommerce sales from 2017 to 2021 (f)

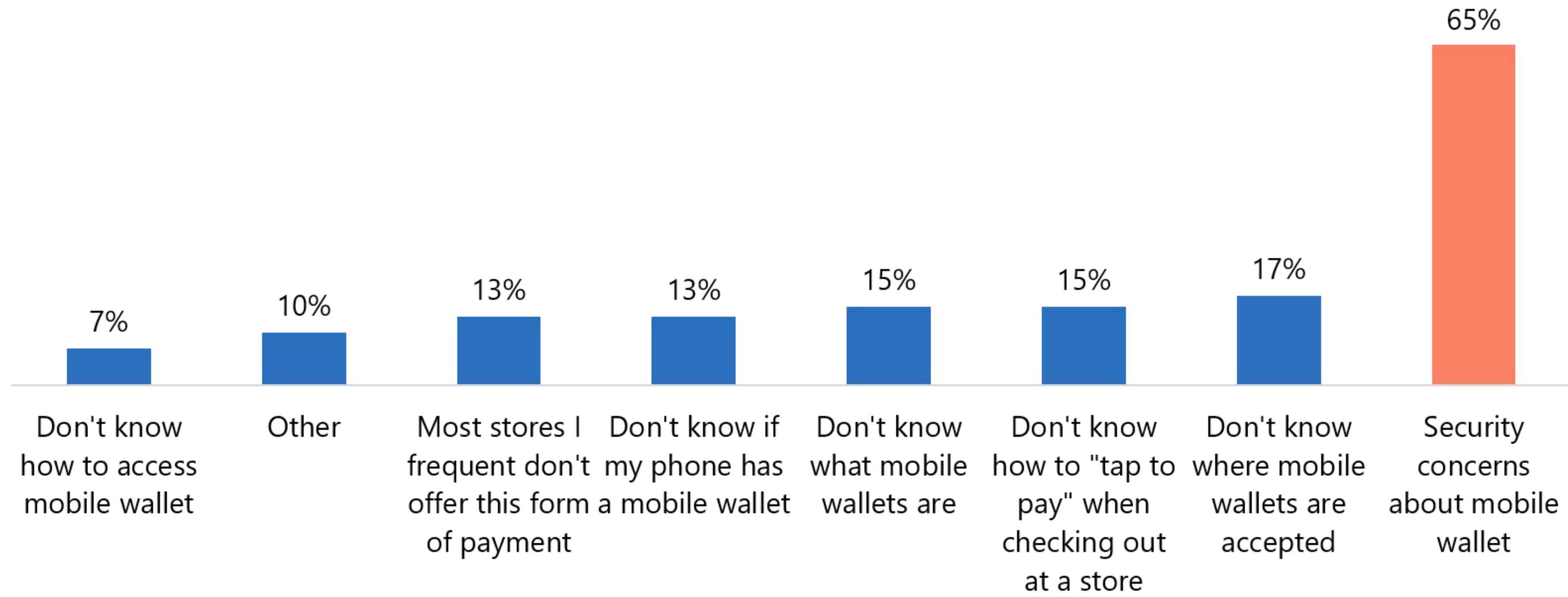
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65% of online consumers are concerned about mobile wallet security

Consumer behavior

Barriers to digital wallet adoption according to smartphone users in the USA, 2019



40% of online consumers find mobile payments faster than other methods

Consumer behavior

Attitudes towards mobile payments according to online shoppers in the USA, 2018

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Amazon is the best online store by ecommerce net sales

Leading retailers

Most popular online stores in the USA in 2018, by ecommerce net sales (million USD)

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

#5		\$6.4
#6		\$4.8
#7		\$4.8
#8		\$4.7

Amazon has the highest ecommerce net sales among electronics online stores

Leading retailers

Most popular online stores in the electronics and media segment in the USA in 2018, by ecommerce net sales (million USD)

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

#5		\$1.9
#6		\$1.2
#7		\$1.2
#8		\$1.2

Macy's has the highest ecommerce net sales among fashion online stores

Leading retailers

Most popular online stores in the fashion segment in the USA in 2018, by ecommerce net sales (million USD)

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

#5	KOHL'S	\$2.1
#6	Walmart 	\$1.4
#7		\$1.2
#8	 VICTORIA'S SECRET	\$1.2

Leading online stores per segment

Leading online furniture and homewear stores

Most popular online stores in the furniture and homeware segment in the USA in 2018, by ecommerce net sales (million USD)

Leading toys and baby stores

Most popular online stores in the toys and baby segment in the USA in 2018, by ecommerce net sales (million USD)

#1		\$4.1
#2		\$3.7
#3		\$2.5
#4		\$2.2
#5		\$1.1

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

Leading online stores per segment

Leading online personal care stores

Most popular online stores in the personal care segment in the USA in 2018, by ecommerce net sales (million USD)

Leading bags and accessories stores

Most popular bags and accessories online stores in the USA in 2018, by ecommerce net sales (million USD)

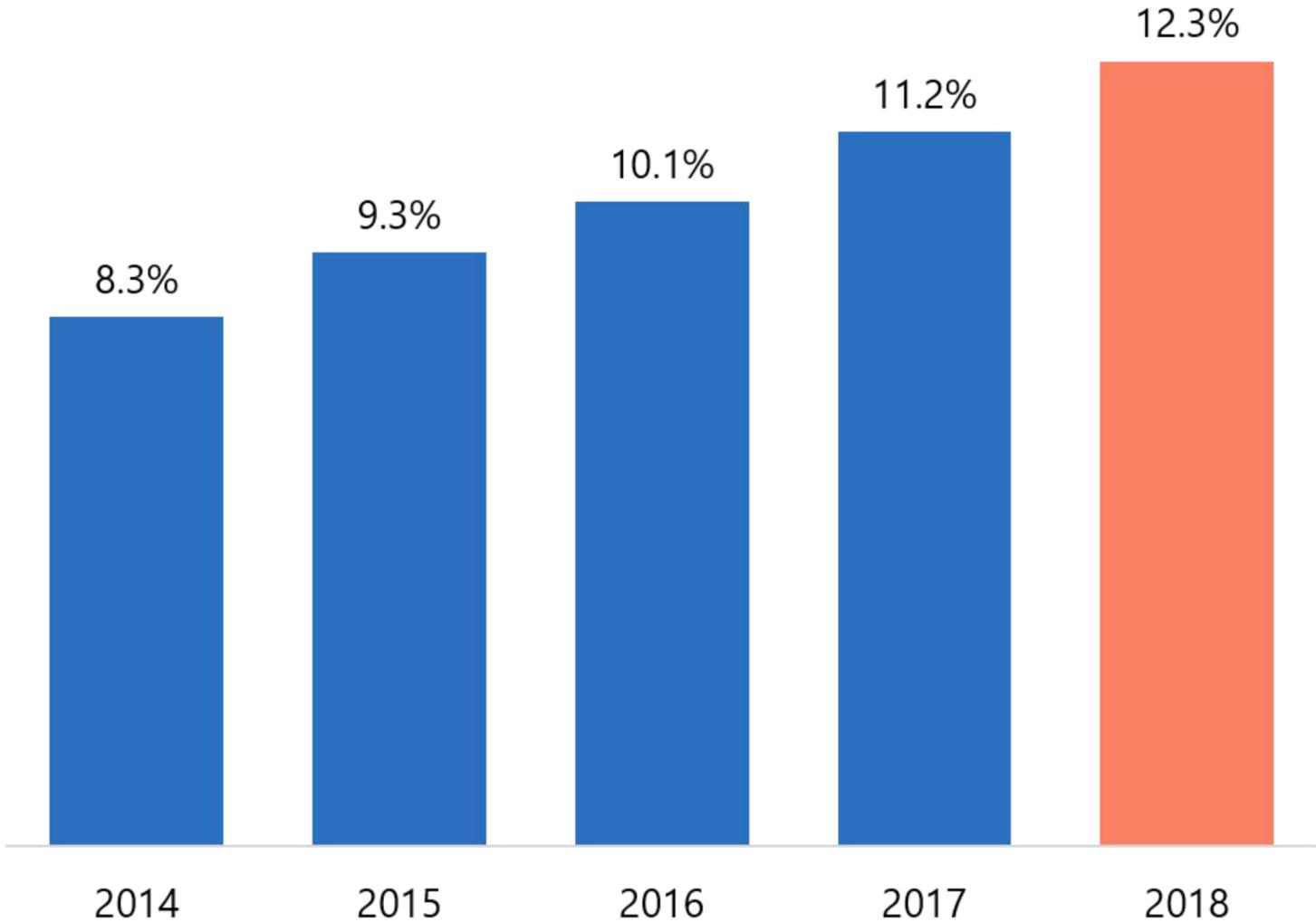
This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

#1		\$628
#2		\$447
#3		\$265
#4		\$240
#5		\$223

In 2018, 12.3% of holiday season sales were performed online

Ecommerce sales

Holiday season sales as percentage of total holiday retail sales in the USA, 2014-2018



Ecommerce sales

Holiday season retail ecommerce sales in the USA by online shopping day, (2017-2018, billion USD)

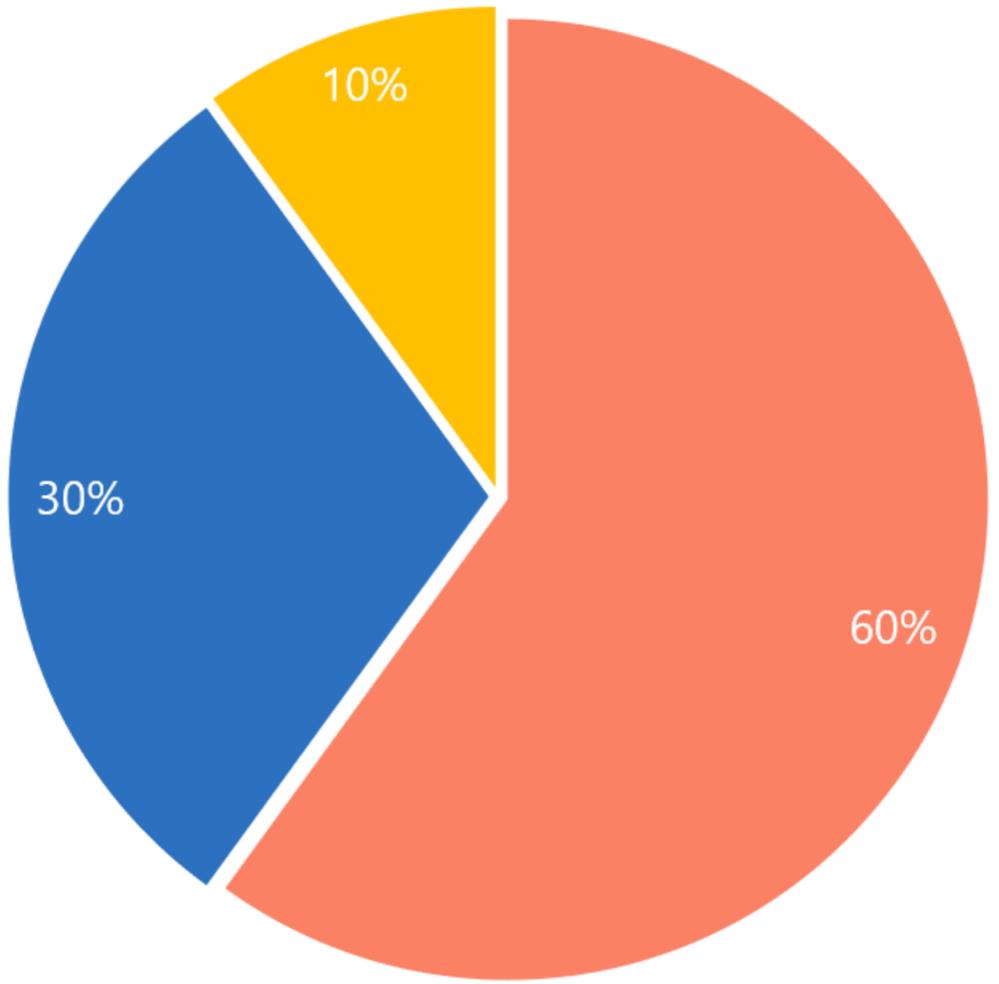
This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

Desktop is the most used device for online shopping during holiday season

Ecommerce sales

Distribution of holiday season ecommerce revenue in the USA by device, 2018

Desktop Smartphone Tablet



Ecommerce sales

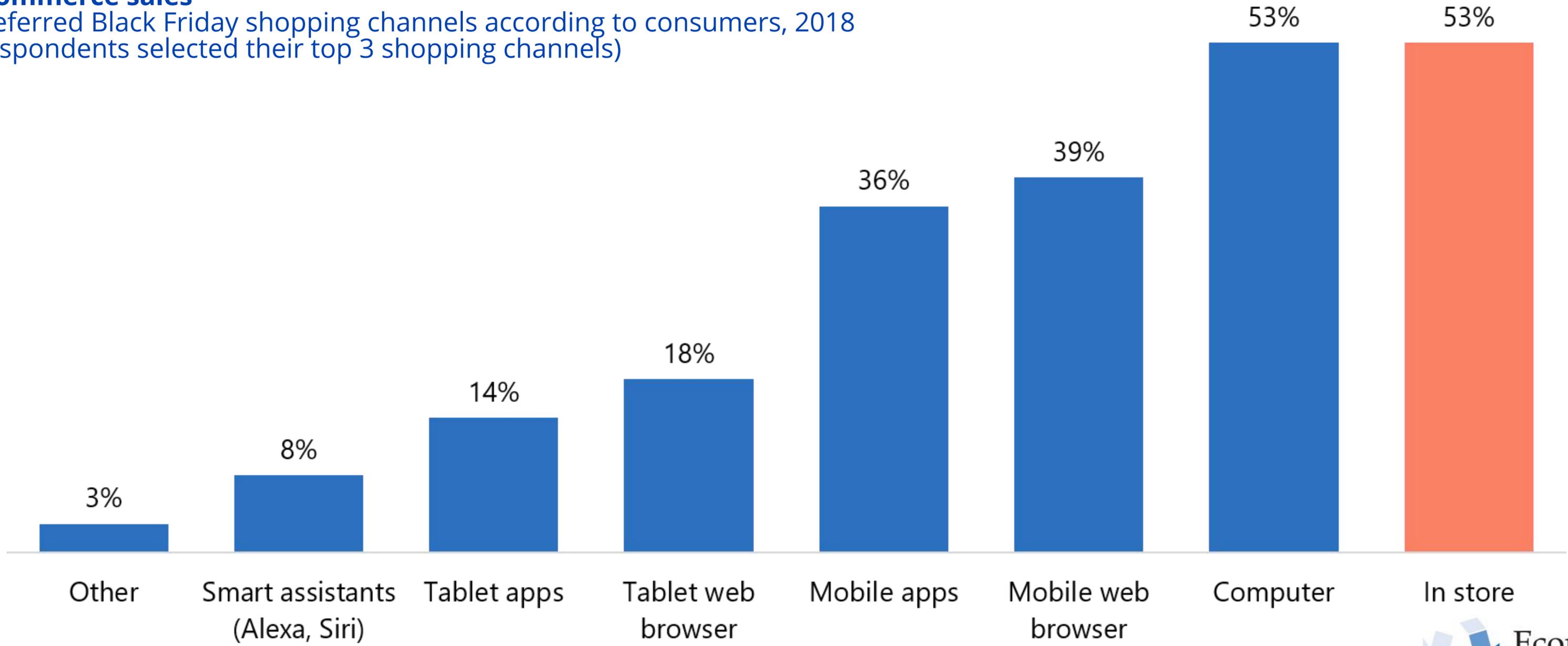
Total digital ecommerce spending in the USA on Cyber Monday, 2014-2018 (billion USD)

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

53% of consumers prefer to shop in store on Black Friday

Ecommerce sales

Preferred Black Friday shopping channels according to consumers, 2018
(respondents selected their top 3 shopping channels)



Cyber Monday has the highest ecommerce sales in all devices

Ecommerce sales

Online retail revenue during Cyber Five in the USA by device, 2018 (billion USD)

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop

80.1% of consumers shopped at Amazon for gifts in 2018

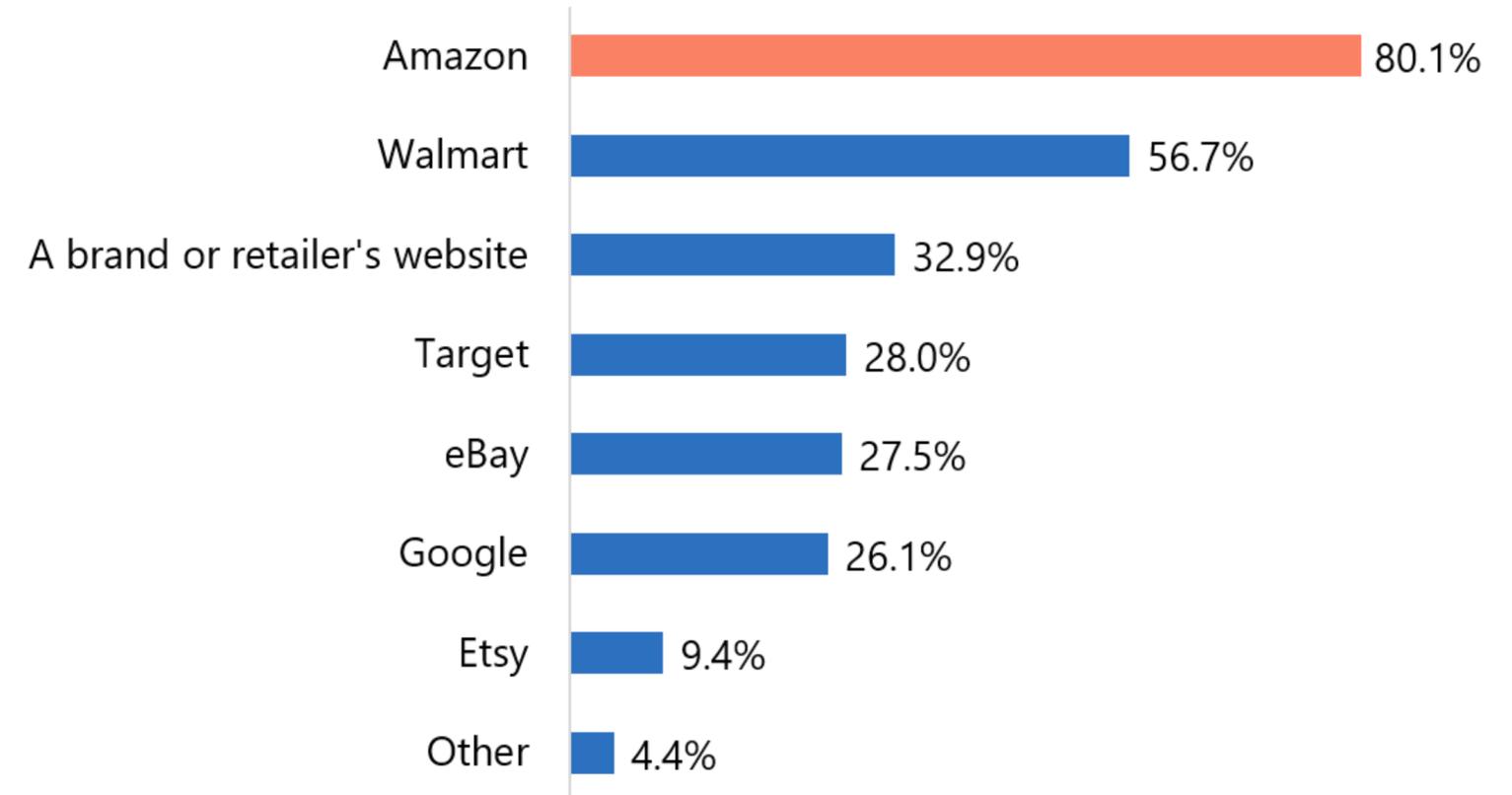
Consumer behavior

When do you plan to start shopping for holiday gifts this year?, 2018

Consumer behavior

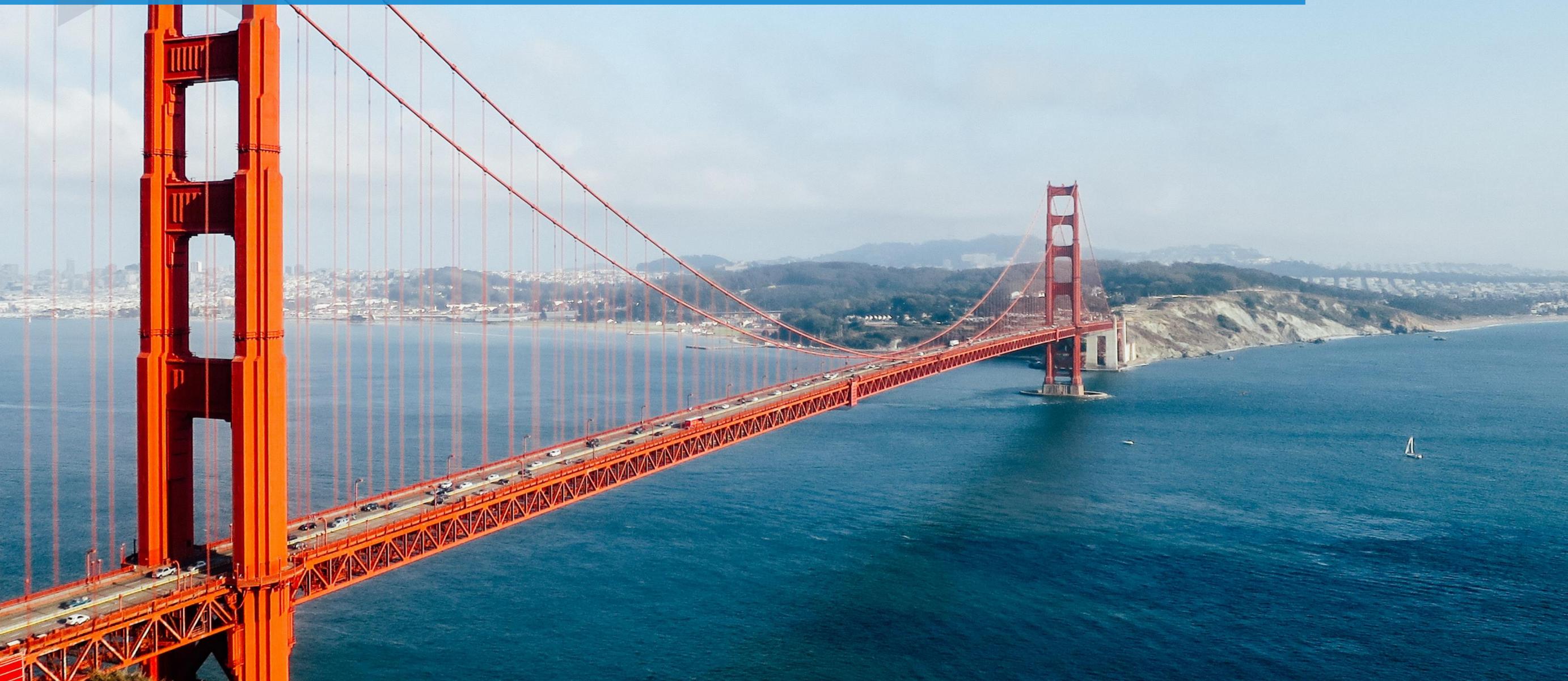
If you are shopping online for gifts, what websites do you plan to use?, 2018

This is the light version of the report -- you can purchase the full version at www.ecommercefoundation.org/shop



#4

Expert Opinions and Advice





Chris Hauca

General manager, SAP Commerce Cloud

Chris Hauca is general manager of SAP Commerce Cloud and has overall responsibility for the commerce offering of SAP C/4HANA, the leading cloud customer experience suite.

He joined SAP in August 2018 as head of strategy and GTM for SAP Enterprise Commerce within the SAP customer experience business unit. Prior to joining SAP, Chris was managing director and partner in the commerce practice at Accenture. He covered many industries including retail, CPG, discrete manufacturing and chemicals, delivering commerce insights and capabilities in B2B, B2C, and B2B2C business models.

Q: What has been the most exciting recent development in ecommerce for you?

A: From ongoing discussions with customers and partners, we are seeing that - specifically in the US market - commerce is everywhere.

All products and services are being e-commercialized and products becoming services, e.g., instead of having to order new coffee each month you sign up for a subscription. And while the number of channels and devices is exploding, customers are choosing whichever device and channel suit them best - with mobile leading the way.

Whether B2C or B2B, customers are expecting a consumer-grade experience making it easy and fast for them to shop across channels. In this context, technologies like headless commerce and Progressive Web Apps (PWA) emerged. Headless commerce de-couples the storefront from the commerce core functionality, adding a lot of flexibility, and allowing to make rapid

changes to the front-end without disturbing the back-end, and vice versa.

This de-coupled architecture implies new functionalities and integrations to be applied much faster, delivering the speed and agility necessary to succeed in the market. A PWA lets you deploy an out-of-the-box store in days rather than weeks or months, using just what you need, while at the same time extend at speed with microservices. For example, it enables the one-tap to buy experience on mobile phones providing an app-like experience.

That way you deliver the seamless shopping experience that customers are expecting and drive conversion and profits.

“(...) commerce is everywhere.”



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Q: Which areas do you feel could be improved upon in order to help in developing/ growing the ecommerce market?

A: One area for improvement is to simplify customer engagement and make shopping more convenient and enjoyable for customers across all channels and devices.

We know that customers who are highly engaged with a brand make 90% more frequent purchases and spend 60% more at each transaction. But how do you compete with marketplaces like Amazon if you can't beat them on price or free shipping options?

Great products and services are no longer enough to keep loyal customers. The best run businesses know that a five-star experience is crucial to their customers, and to their bottom lines. To lead in the experience economy, businesses need to collect and listen to the beliefs, sentiments and intentions of customers, then understand and act upon them.

With SAP's acquisition of Qualtrics, we can synthesize operational data about what happened with experience data and why things happened.

This unique combination allows you to develop insights on-the-fly to anticipate and adapt experiences that meet customer expectations and provide individual, contextually-relevant experiences across all channels. Closed-loop experience management drives automated actions, such as a shopping cart recovery email that's triggered by customers abandoning their shopping carts, or it identifies common causes of abandoned shopping carts.

As such, it operationalizes the listening, understanding and acting into an ongoing, automated process. It creates a cycle of continuous improvement, resulting in happier customers and increased sales.

“A five-star experience is crucial to their customers, and to the bottom line”



Chris Hauca

General manager, SAP Commerce Cloud

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Q: The debate still rages regarding privacy and our online shopping experiences.

Personalization is core to many ecommerce strategies. Do you think these two sides can ever be reconciled?

A: Absolutely. Data privacy laws were created because customers want to be in control of their data and know who used it for which purpose. They are tired of creepy experiences where they don't know what's happening to their data, or whether they're being tracked.

That is why legislation such as the European GDPR has been put into place and other countries have followed or are in the process of doing so. In the US alone are “hundreds of bills that address privacy, cybersecurity and data breaches.... pending across the 50 states”*.

At the same time, various studies have shown that a large portion of customers is willing to share personal data for a clear personal benefit.

*Source: <https://bit.ly/2os2DB0>

The challenge is to comply with regulations while at the same time pointing out the benefits to your customers in exchange for their consent-based data – personalization being one example.

But it is about a lot more than just personalization. It is delivering individually and contextually relevant, as well as in-the-moment experiences that are unique to each customer which significantly contribute to the five-star experience customers request today.

Building trusted relationships with your customers for more conversion and profits requires businesses to incorporate new processes into their organizations and, specifically, the ecommerce channel.

SAP Commerce Cloud lets you securely identify and engage with customers across channels, manage customers' profiles, preferences and consent settings throughout their relationship with your business, and transform permission-based consumer data into unified profiles that provide value to both your customers and your business.



ASENDIA
BY LA POSTE & SWISS POST

Yvette Hooites

Product manager, Asendia

Yvette Hooites has worked for 12 years in international logistics.

Her various positions within different departments, such as supply chain, business development and marketing, have allowed her to acquire a 360° experience in international logistics.

Currently, she is working for the marketing department as product manager and leading or contributing in projects to launch new parcels solutions for the group.

Q: What are your top three tips to approaching a new market such as the USA in the most efficient manner?

A: First of all, it is important to take into account that each country will require a different approach. This means that retailers will need to develop an individual market strategy.

A retailer should identify the customer to be targeted and analyse the market they are entering. Of course, the economic factors – size of the market, growth rates, competitors and local regulations – as well as the culture, are important to analyse before entering the market.

Once you have decided to enter the market, it will be important to decide the investment you want to make in order to develop.

“Adapt the website to local standards of presentation, language and payment”

In my opinion, the minimum requirements are:

- Adapt the website to local standards by changing product presentation and setting currency, language and payment method
- Make sure that it is clear to the shopper what are the conditions for purchase. If duty and taxes are due, make sure they can be paid by the shopper at the moment of purchase. This will be much more appreciated by the shopper than having to pay at the door on delivery
- Make sure the delivery experience is excellent for the shopper, by using the most adapted local network, most trusted delivery partner and by offering track and trace throughout the whole logistic journey of the parcel
- Propose an quick and convenient return process to your shopper

**ASENDIA**

BY LA POSTE & SWISS POST

Yvette Hooites

Product manager, Asendia

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Her various positions within different departments, such as supply chain, business development and marketing, have allowed her to acquire a 360° experience in international logistics.

Currently, she is working for the marketing department as product manager and leading or contributing in projects to launch new parcels solutions for the group.

Q: How can logistics help with shipping issues for SME ecommerce businesses?

A: Logistics will determine how you will serve your shoppers, what kind of delivery times you will be able to propose to your clients and at what cost.

You will need to consider where you will do the fulfillment of your products. Will you centralize or decentralize the pick and pack? This decision will determine the logistics processes you'll need to implement: transport, customs clearance and final mile delivery.

It will also determine the delivery times and cost you can propose to your shoppers. Ultimately, this will influence your success in the market.

“Logistics will determine how you will serve your shoppers”

Q: What are some of the features concerning delivery preferences that you see when a US shopper buys from an international webshop?

A: US customers typically expect a service of five to eight days for delivery of goods bought on the internet. Visibility on where the parcel is in its journey is a standard requirement, especially when ordering from a retailer outside of the US.

The US is such a large territory. USPS delivers most parcels in the US since express companies are generally faster but also more expensive.

US shoppers appreciate the trusted service of this excellent final mile delivery network for which final mile delivery option can be managed through the USPS mobile app. Consignees have different delivery options for last mile delivery and will engage with USPS directly to organize them.

Shipping to the US – What You Need to Know

If retailers start thinking about expanding their ecommerce business into international markets, the US might be an interesting market.

The US represents a huge ecommerce market of \$521 billion in 2018 and with 325 Million inhabitants. Almost 90% are connected to internet and 60% shop regularly on the internet (=175 Million people). Therefore, there are a lot of potential shoppers out there.

Although the market presents huge opportunity, retailers should consider the following latest developments, news, and regulations.

STOP Act

In October 2018, President Trump signed into law The Synthetics Trafficking and Overdose Prevention Act (STOP Act) in a bid to tackle the country's opioid crisis.

The law requires postal operators to send AED/ITMATT (Advance Electronic Data/Item Attribute) data in advance of any package shipped to the US.

This is due to be implemented for all US imports by 2021, although some countries, such as China, have been required to submit AED since late 2018.

“(...) the US represent a huge ecommerce market.”

So what does this mean for retailers?

Firstly, AED adds an extra layer of complexity to the process, requiring information such as:

- Sender's name and address
- Recipient's name
- The package's origin
- Parcel content and value
- Parcel weight

Secondly, the US Postal Service (USPS) – which is responsible for collecting this data – is permitted to collect \$1 on inbound Express Mail Services (EMS) to cover the costs.

As it's unclear whether the charge will cover the programme's costs, it could increase in the future pushing up the price of shipping to the US with it.



Shipping to the US – What You Need to Know

US Stays in the UPU

The USA has considered in the past months to leave the UPU due to the current system of remuneration for collection and delivery of mail and small parcels.

This would have had a huge impact on global ecommerce.

Instead, the US will remain and will be allowed to set its own postal fees from July 2020. The deal struck also allows other countries receiving more than 75,000 tons of mail a year to start phasing in higher prices from January 2021.

While the scale of these increases is uncertain, shippers must prepare for higher prices across the world's largest import markets.



FDA Registration – The Basics

Are you considering shipping medicines or foodstuffs to the US?

In which case, you may need to get approval from the Food and Drug Administration (FDA) before you can import them into the US.

The FDA's regulations are as varied as the products they regulate, but how imports are judged correlates to the risk posed to customers.



“While the scale of these increases is uncertain, shippers must prepare for higher prices across the world's largest import markets.”

Shipping to the US – What You Need to Know

For instance, complex products such as new drugs or medical devices must be proven safe before businesses can sell them, whereas less novel technology such as X-ray machines or existing medicines must simply measure up to performance standards.

Some products, like cosmetics or dietary supplements often require no prior approval at all.

In any case, retailers must investigate if their product needs to be ruled by the FDA and should then file for regulation if needed, prior to setting up the logistics processes to import into the U.S.



While the FDA doesn't test products itself, it will review the results of all laboratory, human, and animal testing relating to a product. Some commonly reviewed products include:

- Vaccines
- Blood products
- Biotechnology products
- Gene therapy
- Complex medical devices
- Food/colour additives
- Infant formulas
- Animal drugs

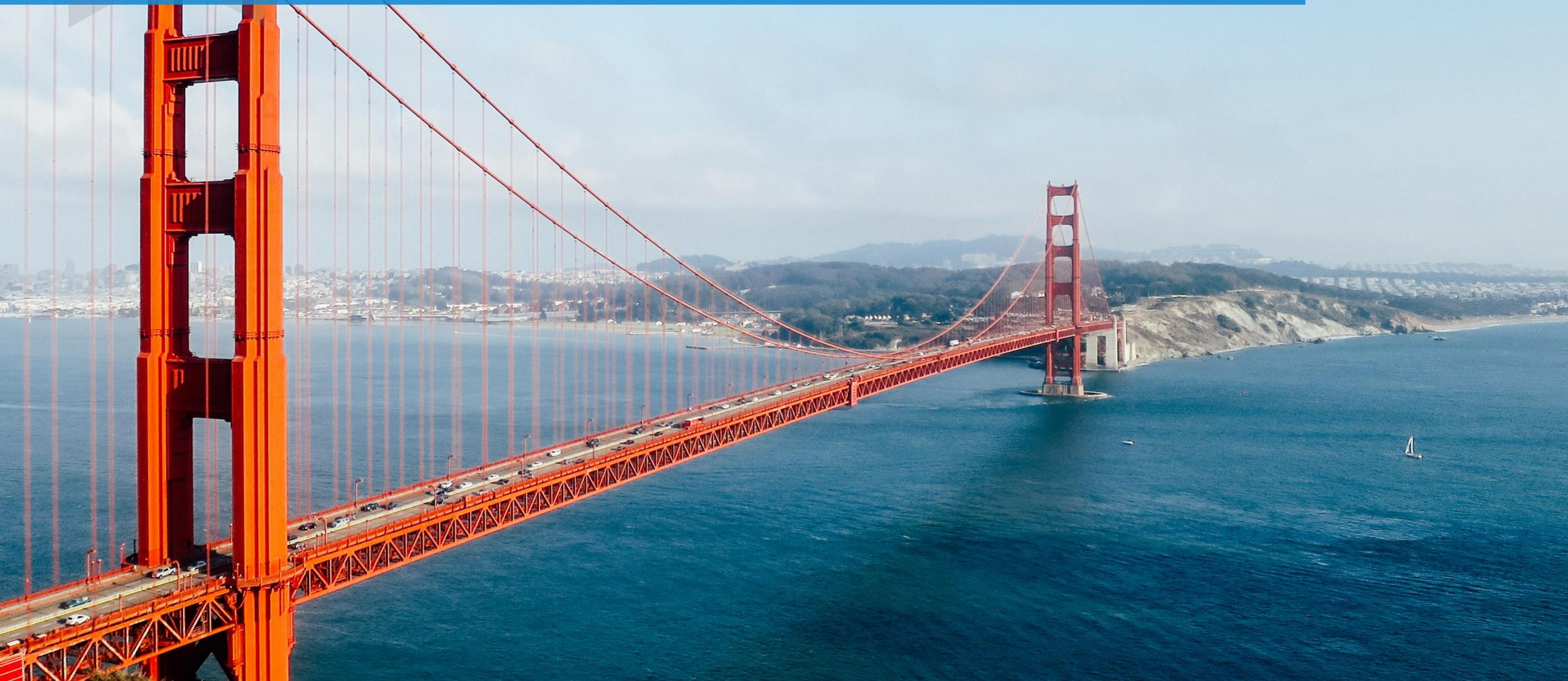
Of course, no two products are the same and requirements and review times can vary.

For example, medical products have been expedited in recent years – so it's always worthwhile visiting <https://www.fda.gov/home> for product-specific information prior to shipping.

“(...) complex products (...) must be proven safe before businesses can sell them.”

#5

About the Report



About the authors



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Research coordinator

Sara holds a Master in Public Policy from the University of California in the United States.

Sara oversees the Ecommerce Foundation Research Team in its creation of country reports, custom research, content and webinars. Sara also presents on research around the world and advises stakeholders in furthering ecommerce globally.



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Ludovica is pursuing a Masters in Environmental Economics at Wageningen University and Research, The Netherlands.

At Ecommerce Foundation, she is part of the research team collecting data and supporting the creation of reports. She is interested in sustainability and data analysis.

Sources used in the report

The report could only be realized by consulting a great number of valuable sources. These were available in various countries and regions in Europe and around the globe. The wide variety of sources includes public domain publications, blogs, websites, industry and financial specialist publications, regional and local news, annual reports and press releases.

Sometimes, these information sources are contradictory and other times, different figures and data were given by varying sources within the same country, for example, due to different definitions. In our reports we have mentioned the different sources, definitions and outcomes of such reports, studies and interpretations.

While the report is based on information that we consider reliable, we cannot vouch for it being completely accurate or complete, nor should it be relied upon as such. Opinions expressed are our current opinions as of the date of this report.

OUR SOURCES

Worldometers

Quandl

Statcounter

E-Government Development Index

Trading economics

Logistics Performance Index

Internet Penetration

Statista: B2C Turnover

Statista: Online shopping penetration

Statista: Mobile retail ecommerce sales

Statista: Customer satisfaction

Statista: Most popular online stores

Statista: Most popular online electronic stores

Statista: E-shopper spending on Cyber Monday

Statista: Ecommerce spending by device

Statista: When to shop during holiday season

Statista: Most popular online stores, holiday season

Statista: Ecommerce spending on Cyber Monday

Statista: When to shop during holiday season

Statista: Mobile payments

Statista: Delivery methods

Statista: How to safe money online

Statista: Holiday season percentage

Statista: Ecommerce sales holiday season

Statista: Payment methods

Statista: Barriers to digital wallets

Statista: Most popular online fashion stores

Statista: Most popular online furniture stores

Statista: Most popular online toys stores

Statista: Most popular online personal care stores

Statista: Most popular online accessories stores

Statista: E-shopper distribution by age

Statista: E-shopper distribution by gender

Statista: E-shopper frequency by gender



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