

# GLOBAL ECOMMERCE

## OPPORTUNITIES & RISKS

2017

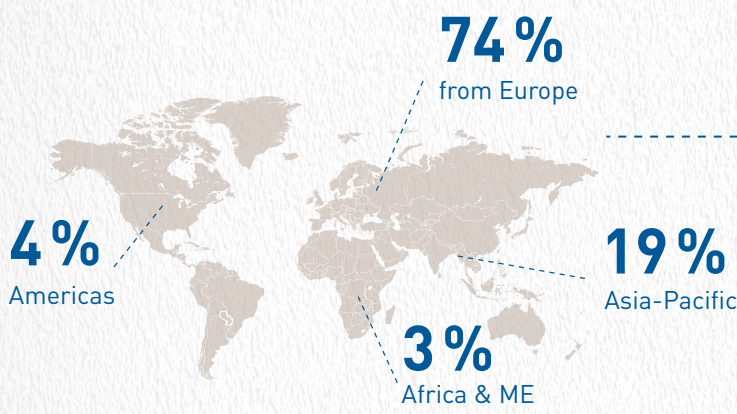
### PANEL & METHODOLOGY



Almost **300** respondents coming from

**45** different countries

PORTO BEIJING  
HANOI LONDON  
PRAGUE MILAN PARIS  
SHANGHAI ROTTERDAM  
BARCELONA SINGAPORE



Questionnaire conducted in Chinese, English, French, and German during summer 2017

Incl. Top countries represented: CHINA, FRANCE, GERMANY, SPAIN AND THE NETHERLANDS

#### COMPANY SIZE

**50%** <100 staff,  
**25%** between 100-1000,  
**25%** >1000

#### TOP 3 SECTORS



**38%**  
Retail /wholesale



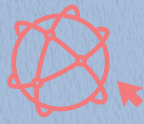
**27%**  
Service



**10%**  
Financial Services

### OPPORTUNITIES

#### KEY MARKET TRENDS



The **global e-commerce market** has grown by 17% in 2017



**Top 3 E-GDP countries** are UK-8%, China-6%, and France 4% (global average is 3%)



**Cross border e-commerce** is expected to increase to 30% in 2020



**42%** of respondents see the e-commerce market growing even stronger than the current **high speed pace**



**66%** of respondents say the **impact** of e-commerce on their sectors will be strong/very strong



**40%** perform online sales **internationally**, and +25% will do it soon

#### TOP 5 CHALLENGES TO GO ABROAD



Local customer expectations



Legal and regulatory issues



Competition



Logistics issues



Taxes, VAT and customs

#### TOP 3 STRATEGIC CHOICES TO GO ABROAD



ALLIANCES



CHANGE OF BUSINESS MODEL



DIVERSIFICATION

Only **16%** of respondents score their **company's culture** as 'agile enough to make the necessary changes'.

### RISKS

#### TOP 5 GLOBAL RISKS

**N°1 =** Increased competition



**N°2 =** IT availability and performance



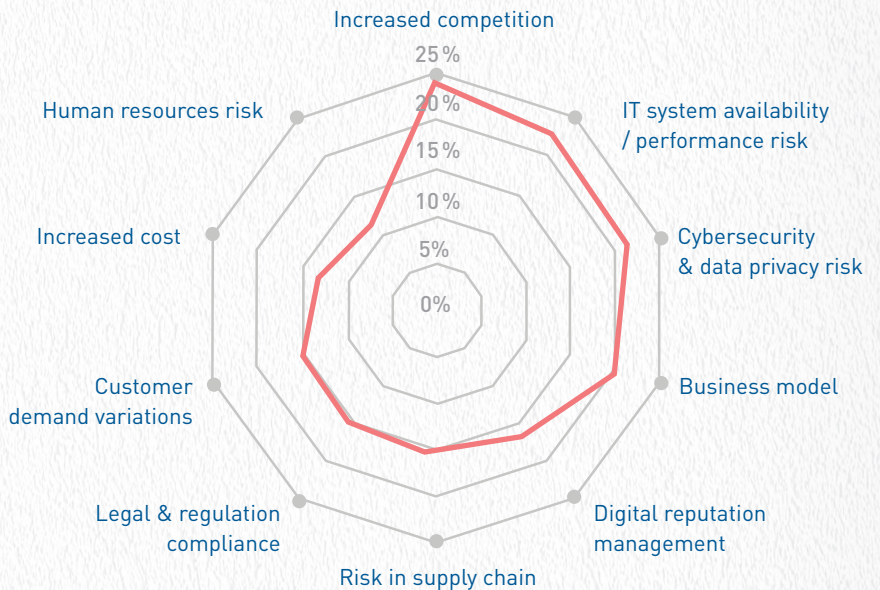
**N°3 =** Cybersecurity / Data privacy



**N°4 =** Business model



**N°5 =** Digital reputation



#### KEY TRENDS VS TOP RISKS



COMPETITION:

**Price is the most important factor** for consumers when they shop online



IT AVAILABILITY & PERFORMANCE:

**Internet penetration** continues to grow globally **5-7% every year**



CYBERSECURITY & DATA PRIVACY:

**66%** of global consumers plan on mobile purchasing in the future



BUSINESS MODEL:

Both **Amazon and Alibaba** are ranked among the top 10 internet companies by capitalization



REPUTATION:

Global consumers cite **'trust'** as the **main barrier to purchasing more online**