

WORLDWIDE RETAIL ECOMMERCE SALES

eMarketer's Estimates and Forecast, 2013-2018

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EXECUTIVE SUMMARY

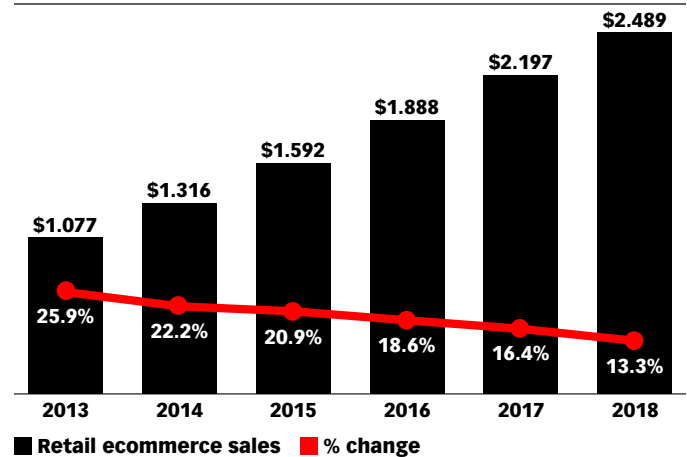
The latest update to eMarketer's global retail ecommerce forecast for 2013–2018 contains changes to top-line numbers, largely driven by additional data for Asia-Pacific, and features modifications to how we segment retail and ecommerce sales in general. In a first for this forecast, eMarketer has included total retail sales by region and country, and added regional and worldwide totals for retail ecommerce sales.

eMarketer estimates that global retail sales will grow 6.4% in 2015 to \$23.927 trillion. Ecommerce will account for \$1.592 trillion, or 6.7% of that total, a nearly 21% increase from 2014. Asia-Pacific will see the strongest retail ecommerce growth rate (28.2%), but all regions will record double-digit increases.

New economic data has emerged since our forecast update in September 2014. US retail ecommerce and overall retail sales have performed slightly better than anticipated, boosted by low oil prices. Europe continues to report weak sales growth overall, which has led to some downgrades in Western European retail and retail ecommerce figures. Russia has started to feel the pinch of Western sanctions, pushing down eMarketer's short-term projections for retail sales there. Long term, however, Russia's growth curve is unchanged, as it will likely replace lost Western trade with a pivot to Asia. Asia-Pacific's numbers have been raised to reflect not only stronger retail markets in Australia and Indonesia but also as a result of including consumer-to-consumer (C2C) ecommerce in China's retail sales tally.

In addition to total retail and retail ecommerce sales figures, this report also offers estimates for digital shoppers and buyers. The forecasts for these are mostly unchanged, save for some minor revisions to a few countries.

Retail Ecommerce Sales Worldwide, 2013-2018
trillions and % change



Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel
Source: eMarketer, Dec 2014

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KEY QUESTIONS

- What percentage of total retail sales is ecommerce?
- Which countries are retail ecommerce leaders?
- How fast will retail ecommerce grow in the future?

CONTENTS

- 2 Executive Summary
- 3 Sales Forecast Overview
- 7 Digital Buyers and Shoppers
- 12 Complete Retail Ecommerce Forecast
- 21 Related eMarketer Reports
- 21 Editorial and Production Contributors

SALES FORECAST OVERVIEW

TOTAL RETAIL SALES

In 2015, global retail sales across all channels will reach \$23.927 trillion, up 6.4% from the \$22.492 trillion forecast for 2014. Asia-Pacific will lead all regions with \$9.298 trillion in total retail sales in 2015—38.9% of the global total—on 9.3% growth. Although Latin America will record only \$1.782 trillion in total retail sales, it will have the highest growth rate (11.7%) of any region in 2015. The Middle East and Africa will follow with 7.9% growth, but on a much lower sales volume. North America and Western Europe, the second- and third-largest regions in retail sales respectively, will see the slowest growth, with gains of less than 5% each.

Total Retail Sales Worldwide, by Region, 2013-2017

	2013	2014	2015	2016	2017
Total retail sales (billions)					
Asia-Pacific	\$7,765.91	\$8,506.12	\$9,298.74	\$10,133.78	\$10,970.20
North America	\$4,995.96	\$5,184.25	\$5,396.65	\$5,603.25	\$5,817.86
Western Europe	\$4,407.20	\$4,452.48	\$4,500.93	\$4,549.87	\$4,601.40
Central & Eastern Europe	\$1,806.91	\$1,932.89	\$2,062.63	\$2,196.37	\$2,360.46
Latin America	\$1,440.05	\$1,595.32	\$1,782.27	\$1,925.65	\$2,041.14
Middle East & Africa	\$773.44	\$821.07	\$885.87	\$957.06	\$1,035.77
Worldwide	\$21,189.46	\$22,492.12	\$23,927.09	\$25,365.97	\$26,826.82
Total retail sales growth (% change)					
Latin America	13.9%	10.8%	11.7%	8.0%	6.0%
Asia-Pacific	9.6%	9.5%	9.3%	9.0%	8.3%
Central & Eastern Europe	10.4%	7.0%	6.7%	6.5%	7.5%
Middle East & Africa	7.2%	6.2%	7.9%	8.0%	8.2%
North America	4.1%	3.8%	4.1%	3.8%	3.8%
Western Europe	0.1%	1.0%	1.1%	1.1%	1.1%
Worldwide	6.4%	6.1%	6.4%	6.0%	5.8%

Total retail sales share (% of total)

	2013	2014	2015	2016	2017
Asia-Pacific	36.6%	37.8%	38.9%	40.0%	40.9%
North America	23.6%	23.0%	22.6%	22.1%	21.7%
Western Europe	20.8%	19.8%	18.8%	17.9%	17.2%
Central & Eastern Europe	8.5%	8.6%	8.6%	8.7%	8.8%
Latin America	6.8%	7.1%	7.4%	7.6%	7.6%
Middle East & Africa	3.7%	3.7%	3.7%	3.8%	3.9%

Note: excludes travel and event tickets

Source: eMarketer, Dec 2014

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China's burgeoning middle class is driving the rapid growth in overall retail sales globally. In 2015, China will record \$4.704 trillion in retail sales, just behind the \$4.908 trillion expected for the US. By 2016, China's retail sales should surpass those in the US.

Total Retail Sales Worldwide, by Country, 2013-2017 billions

	2013	2014	2015	2016	2017
US*	\$4,528.22	\$4,706.21	\$4,908.58	\$5,104.92	\$5,309.12
China**	\$3,783.78	\$4,237.84	\$4,704.00	\$5,174.40	\$5,640.09
Japan	\$1,423.20	\$1,453.78	\$1,482.85	\$1,520.81	\$1,555.84
Germany	\$851.81	\$862.88	\$870.65	\$877.61	\$883.76
France	\$817.52	\$829.78	\$839.74	\$848.14	\$854.92
Russia	\$743.03	\$794.30	\$845.93	\$900.06	\$959.92
India	\$635.25	\$717.83	\$818.33	\$941.08	\$1,082.24
UK*	\$608.03	\$632.05	\$651.60	\$666.25	\$679.85
Italy	\$496.38	\$479.01	\$469.43	\$463.32	\$461.01
Canada	\$467.74	\$478.03	\$488.07	\$498.32	\$508.74
Brazil	\$395.90	\$428.76	\$460.06	\$490.42	\$517.89
South Korea	\$360.63	\$368.93	\$376.31	\$383.83	\$391.51
Mexico	\$355.78	\$366.45	\$386.60	\$405.93	\$426.23
Spain	\$341.63	\$336.84	\$334.16	\$333.15	\$333.48
Sweden	\$239.30	\$246.48	\$253.87	\$262.00	\$269.86
Indonesia	\$203.25	\$245.93	\$293.15	\$337.71	\$379.93
Argentina	\$181.21	\$239.20	\$299.00	\$337.87	\$371.65
Australia	\$222.09	\$231.41	\$238.59	\$245.75	\$253.12
Netherlands	\$184.59	\$185.51	\$187.37	\$189.81	\$192.46
Denmark	\$95.90	\$97.53	\$99.38	\$101.47	\$103.70
Norway	\$92.06	\$93.90	\$96.25	\$98.94	\$101.91
Finland	\$65.22	\$65.55	\$66.08	\$66.74	\$67.51

Note: excludes travel and event tickets; *forecast from Sep 2014;

**excludes Hong Kong

Source: eMarketer, Dec 2014

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With an expected jump of 25%, Argentina will have the fastest retail sales growth in the world in 2015. But that gain will be mostly a result of skyrocketing inflation—real growth will be minimal. Most of the other fastest growing retail economies will be in Asia-Pacific, led by Indonesia, India and China.

Total Retail Sales Growth Worldwide, by Country, 2013-2018

% change

	2013	2014	2015	2016	2017	2018
Argentina	28.0%	32.0%	25.0%	13.0%	10.0%	9.0%
Indonesia	22.0%	21.0%	19.2%	15.2%	12.5%	9.5%
India	10.0%	13.0%	14.0%	15.0%	15.0%	15.0%
China*	13.1%	12.0%	11.0%	10.0%	9.0%	8.0%
Brazil	7.0%	8.3%	7.3%	6.6%	5.6%	5.3%
Russia	10.6%	6.9%	6.5%	6.4%	6.7%	7.4%
Australia	3.0%	4.2%	3.1%	3.0%	3.0%	2.9%
UK**	3.1%	4.0%	3.1%	2.2%	2.0%	1.9%
US**	4.2%	3.9%	4.3%	4.0%	4.0%	4.0%
Mexico	2.0%	3.0%	5.5%	5.0%	5.0%	4.5%
Sweden	2.4%	3.0%	3.0%	3.2%	3.0%	3.1%
South Korea	2.5%	2.3%	2.0%	2.0%	2.0%	1.9%
Canada	2.5%	2.2%	2.1%	2.1%	2.1%	2.1%
Japan	1.0%	2.1%	2.0%	2.6%	2.3%	2.0%
Norway	1.3%	2.0%	2.5%	2.8%	3.0%	3.2%
Denmark	0.9%	1.7%	1.9%	2.1%	2.2%	2.3%
France	1.0%	1.5%	1.2%	1.0%	0.8%	0.6%
Germany	0.1%	1.3%	0.9%	0.8%	0.7%	0.7%
Finland	0.1%	0.5%	0.8%	1.0%	1.2%	1.3%
Netherlands	-2.7%	0.5%	1.0%	1.3%	1.4%	1.6%
Spain	-3.0%	-1.4%	-0.8%	-0.3%	0.1%	0.4%
Italy	-2.6%	-3.5%	-2.0%	-1.3%	-0.5%	0.1%

Note: excludes travel and event tickets; *excludes Hong Kong; **forecast from Sep 2014

Source: eMarketer, Dec 2014

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Over 40% of global retail sales will occur in the US and China in 2015, led by the US with a 20.5% share. Sales in these retail giants will dwarf those in any other country. Japan will be a distant third, achieving a 6.2% share.

Total Retail Sales Share Worldwide, by Country, 2013-2018

% of total

	2013	2014	2015	2016	2017	2018
US*	21.4%	20.9%	20.5%	20.1%	19.8%	19.5%
China**	17.9%	18.8%	19.7%	20.4%	21.0%	21.5%
Japan	6.7%	6.5%	6.2%	6.0%	5.8%	5.6%
Germany	4.0%	3.8%	3.6%	3.5%	3.3%	3.1%
France	3.9%	3.7%	3.5%	3.3%	3.2%	3.0%
Russia	3.5%	3.5%	3.5%	3.5%	3.6%	3.6%
India	3.0%	3.2%	3.4%	3.7%	4.0%	4.4%
UK*	2.9%	2.8%	2.7%	2.6%	2.5%	2.4%
Canada	2.2%	2.1%	2.0%	2.0%	1.9%	1.8%
Italy	2.3%	2.1%	2.0%	1.8%	1.7%	1.6%
Brazil	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
Mexico	1.7%	1.6%	1.6%	1.6%	1.6%	1.6%
South Korea	1.7%	1.6%	1.6%	1.5%	1.5%	1.4%
Spain	1.6%	1.5%	1.4%	1.3%	1.2%	1.2%
Argentina	0.9%	1.1%	1.2%	1.3%	1.4%	1.4%
Indonesia	1.0%	1.1%	1.2%	1.3%	1.4%	1.5%
Sweden	1.1%	1.1%	1.1%	1.0%	1.0%	1.0%
Australia	1.0%	1.0%	1.0%	1.0%	0.9%	0.9%
Netherlands	0.9%	0.8%	0.8%	0.7%	0.7%	0.7%
Denmark	0.5%	0.4%	0.4%	0.4%	0.4%	0.4%
Norway	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%
Finland	0.3%	0.3%	0.3%	0.3%	0.3%	0.2%

Note: excludes travel and event tickets; *forecast from Sep 2014; **excludes Hong Kong

Source: eMarketer, Dec 2014

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RETAIL ECOMMERCE SALES

Global retail ecommerce sales will near \$1.592 trillion in 2015, driven by strong growth in every region. The fastest gains will occur in Asia-Pacific and Latin America, although both areas will still see a smaller percentage of overall retail come from ecommerce than will the more mature markets of North America and Western Europe. Moreover, there remains strong potential for further rapid growth in these quickly advancing but still developing ecommerce markets.

Retail Ecommerce Sales Worldwide, by Region, 2013-2017

	2013	2014	2015	2016	2017
Retail ecommerce sales (billions)					
Asia-Pacific	\$459.86	\$597.25	\$765.38	\$953.21	\$1,148.15
North America	\$285.26	\$330.29	\$377.82	\$427.48	\$480.16
Western Europe	\$244.11	\$282.70	\$321.04	\$355.59	\$390.17
Central & Eastern Europe	\$41.69	\$48.41	\$56.38	\$65.04	\$75.36
Latin America	\$29.54	\$37.29	\$45.75	\$55.12	\$64.43
Middle East & Africa	\$16.32	\$20.00	\$25.25	\$31.48	\$38.51
Worldwide	\$1,076.78	\$1,315.94	\$1,591.63	\$1,887.91	\$2,196.78
Retail ecommerce sales growth (% change)					
Asia-Pacific	38.0%	29.9%	28.2%	24.5%	20.5%
Latin America	39.7%	26.3%	22.7%	20.5%	16.9%
Middle East & Africa	29.7%	22.6%	26.3%	24.7%	22.3%
Central & Eastern Europe	27.1%	16.1%	16.4%	15.4%	15.9%
North America	16.6%	15.8%	14.4%	13.1%	12.3%
Western Europe	16.0%	15.8%	13.6%	10.8%	9.7%
Worldwide	25.9%	22.2%	20.9%	18.6%	16.4%
Retail ecommerce % of total retail sales					
Asia-Pacific	5.9%	7.0%	8.2%	9.4%	10.5%
North America	5.7%	6.4%	7.0%	7.6%	8.3%
Western Europe	5.5%	6.3%	7.1%	7.8%	8.5%
Central & Eastern Europe	2.3%	2.5%	2.7%	3.0%	3.2%
Middle East & Africa	2.1%	2.4%	2.9%	3.3%	3.7%
Latin America	2.1%	2.3%	2.6%	2.9%	3.2%
Worldwide	5.1%	5.9%	6.7%	7.4%	8.2%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets

Source: eMarketer, Dec 2014

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In 2015, China's retail ecommerce sales will increase by \$136.40 billion over 2014's tally, topping \$562.66 billion, and strengthen the country's position as the world's leader in retail ecommerce sales. This estimate represents a sharp increase over our previous calculation for China's retail ecommerce market. A large portion of retail ecommerce in China takes place between individuals or small businesses using payment systems in chat apps or digital marketplaces; we now include these transactions in our estimates.

Retail Ecommerce Sales Worldwide, by Country, 2013-2018

billions

	2013	2014	2015	2016	2017	2018
China*	\$315.75	\$426.26	\$562.66	\$714.58	\$871.79	\$1,011.28
US**	\$264.28	\$305.65	\$349.06	\$394.43	442.55	\$493.89
UK**	\$70.39	\$82.00	\$93.89	\$104.22	\$114.64	\$124.96
Japan	\$62.13	\$70.83	\$79.33	\$88.06	\$96.87	\$106.07
Germany	\$51.91	\$63.38	\$73.46	\$82.93	\$91.97	\$99.33
France	\$34.21	\$38.36	\$42.62	\$46.13	\$49.71	\$53.26
South Korea	\$29.30	\$33.11	\$36.76	\$40.43	\$44.07	\$47.82
Canada	\$20.98	\$24.63	\$28.77	\$33.05	\$37.61	\$42.67
Russia	\$15.06	\$17.47	\$20.30	\$23.40	\$26.88	\$30.91
Brazil	\$13.34	\$16.28	\$18.80	\$21.34	\$23.79	\$26.17
Spain	\$12.47	\$13.96	\$15.90	\$17.93	\$19.97	\$21.74
Australia	\$8.01	\$9.40	\$10.76	\$12.05	\$13.32	\$14.52
Norway	\$8.07	\$9.13	\$10.30	\$11.34	\$12.37	\$13.33
Sweden	\$7.57	\$8.69	\$9.71	\$10.72	\$11.77	\$12.75
Denmark	\$7.41	\$8.40	\$9.27	\$10.01	\$10.75	\$11.44
Italy	\$7.51	\$8.23	\$8.91	\$9.53	\$10.08	\$10.48
Netherlands	\$7.09	\$7.92	\$8.70	\$9.31	\$9.85	\$10.34
Finland	\$5.99	\$6.45	\$6.86	\$7.24	\$7.56	\$7.84
India	\$3.59	\$5.30	\$7.69	\$10.68	\$14.18	\$17.52
Mexico	\$3.46	\$4.57	\$5.94	\$7.54	\$9.43	\$11.50
Argentina	\$2.33	\$3.33	\$4.67	\$6.44	\$8.31	\$9.97
Indonesia	\$1.07	\$1.58	\$2.36	\$3.52	\$4.58	\$5.80

*Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets; *excludes Hong Kong; **forecast from Sep 2014*
Source: eMarketer, Dec 2014

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Looking at the global total, China's 35.4% share of retail ecommerce will be more than double the share of all Western European countries combined in 2015. Moreover, its 3 percentage point gain will be the largest of any country tracked and one of only three countries to see share growth—the other two being India and Mexico—this year.

Retail Ecommerce Sales Share Worldwide, by Country, 2013-2018

% of total

	2013	2014	2015	2016	2017	2018
China*	29.3%	32.4%	35.4%	37.9%	39.7%	40.6%
US**	24.5%	23.2%	21.9%	20.9%	20.1%	19.8%
UK**	6.5%	6.2%	5.9%	5.5%	5.2%	5.0%
Japan	5.8%	5.4%	5.0%	4.7%	4.4%	4.3%
Germany	4.8%	4.8%	4.6%	4.4%	4.2%	4.0%
France	3.2%	2.9%	2.7%	2.4%	2.3%	2.1%
South Korea	2.7%	2.5%	2.3%	2.1%	2.0%	1.9%
Canada	1.9%	1.9%	1.8%	1.8%	1.7%	1.7%
Russia	1.4%	1.3%	1.3%	1.2%	1.2%	1.2%
Brazil	1.2%	1.2%	1.2%	1.1%	1.1%	1.1%
Spain	1.2%	1.1%	1.0%	0.9%	0.9%	0.9%
Australia	0.7%	0.7%	0.7%	0.6%	0.6%	0.6%
Norway	0.7%	0.7%	0.6%	0.6%	0.6%	0.5%
Sweden	0.7%	0.7%	0.6%	0.6%	0.5%	0.5%
Denmark	0.7%	0.6%	0.6%	0.5%	0.5%	0.5%
Italy	0.7%	0.6%	0.6%	0.5%	0.5%	0.4%
Netherlands	0.7%	0.6%	0.5%	0.5%	0.4%	0.4%
Finland	0.6%	0.5%	0.4%	0.4%	0.3%	0.3%
India	0.3%	0.4%	0.5%	0.6%	0.6%	0.7%
Argentina	0.2%	0.3%	0.3%	0.3%	0.4%	0.4%
Mexico	0.3%	0.3%	0.4%	0.4%	0.4%	0.5%
Indonesia	0.1%	0.1%	0.1%	0.2%	0.2%	0.2%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets; *excludes Hong Kong; **forecast from Sep 2014
Source: eMarketer, Dec 2014

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Powered by China, Asia-Pacific will have the highest percentage of retail sales attributed to ecommerce (8.2%) in 2015.

Retail Ecommerce Sales as a Percent of Total Retail Sales Worldwide, by Region, 2015

Asia-Pacific	8.2%
Western Europe	7.1%
North America	7.0%
Middle East & Africa	2.9%
Central & Eastern Europe	2.7%
Latin America	2.6%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets
Source: eMarketer, Dec 2014

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Like China, most countries will experience double-digit growth in ecommerce in 2015. The biggest exceptions will be some countries in Western Europe that have mature ecommerce markets and struggling economies, such as the France, Italy and Finland. Nevertheless, sales gains in those nations will still rise by single digits.

Retail Ecommerce Sales Growth Worldwide, by Country, 2013-2018

% change

	2013	2014	2015	2016	2017	2018
Indonesia	78.0%	47.9%	49.9%	49.1%	30.0%	26.5%
India	55.6%	47.6%	45.2%	38.9%	32.8%	23.5%
Argentina	41.1%	43.0%	40.0%	38.0%	29.0%	20.0%
China*	47.0%	35.0%	32.0%	27.0%	22.0%	16.0%
Mexico	50.0%	32.0%	30.0%	27.0%	25.0%	22.0%
Germany	21.7%	22.1%	15.9%	12.9%	10.9%	8.0%
Brazil	28.0%	22.0%	15.5%	13.5%	11.5%	10.0%
Canada	17.7%	17.4%	16.8%	14.9%	13.8%	13.5%
Australia	11.6%	17.3%	14.4%	12.0%	10.6%	9.0%
UK**	17.0%	16.5%	14.5%	11.0%	10.0%	9.0%
Russia	27.4%	16.0%	16.2%	15.3%	14.9%	15.0%
US**	16.5%	15.7%	14.2%	13.0%	12.2%	11.6%
Sweden	17.8%	14.8%	11.7%	10.4%	9.8%	8.3%
Japan	17.9%	14.0%	12.0%	11.0%	10.0%	9.5%
Denmark	14.2%	13.3%	10.4%	8.0%	7.3%	6.4%
Norway	17.1%	13.1%	12.8%	10.1%	9.1%	7.8%
South Korea	12.6%	13.0%	11.0%	10.0%	9.0%	8.5%
France	13.2%	12.1%	11.1%	8.2%	7.8%	7.1%
Spain	9.2%	12.0%	13.9%	12.8%	11.4%	8.8%
Netherlands	6.0%	11.6%	9.9%	7.1%	5.7%	5.0%
Italy	12.5%	9.6%	8.3%	7.0%	5.7%	4.0%
Finland	9.8%	7.6%	6.4%	5.5%	4.5%	3.7%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets; *excludes Hong Kong; **forecast from Sep 2014
Source: eMarketer, Dec 2014

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The UK will remain the world's leader when it comes to retail ecommerce's share of total retail sales in 2015. The UK's 14.4% figure will be more than twice the 7.1% seen in the US. China and several Nordic countries will also exceed 10%.

Retail Ecommerce Sales as a Percent of Total Retail Sales in Select Countries, 2013-2018

	2013	2014	2015	2016	2017	2018
UK*	11.6%	13.0%	14.4%	15.6%	16.9%	18.0%
China**	8.3%	10.1%	12.0%	13.8%	15.5%	16.6%
Finland	9.2%	9.8%	10.4%	10.8%	11.2%	11.5%
Norway	8.8%	9.7%	10.7%	11.5%	12.1%	12.7%
South Korea	8.1%	9.0%	9.8%	10.5%	11.3%	12.0%
Denmark	7.7%	8.6%	9.3%	9.9%	10.4%	10.8%
Germany	6.1%	7.3%	8.4%	9.4%	10.4%	11.2%
US*	5.8%	6.5%	7.1%	7.7%	8.3%	8.9%
Canada	4.5%	5.2%	5.9%	6.6%	7.4%	8.2%
Japan	4.4%	4.9%	5.4%	5.8%	6.2%	6.7%
France	4.2%	4.6%	5.1%	5.4%	5.8%	6.2%
Netherlands	3.8%	4.3%	4.6%	4.9%	5.1%	5.3%
Australia	3.6%	4.1%	4.5%	4.9%	5.3%	5.6%
Spain	3.6%	4.1%	4.8%	5.4%	6.0%	6.5%
Brazil	3.4%	3.8%	4.1%	4.4%	4.6%	4.8%
Sweden	3.2%	3.5%	3.8%	4.1%	4.4%	4.6%
Russia	2.0%	2.2%	2.4%	2.6%	2.8%	3.0%
Italy	1.5%	1.7%	1.9%	2.1%	2.2%	2.3%
Argentina	1.3%	1.4%	1.6%	1.9%	2.2%	2.5%
Mexico	1.0%	1.2%	1.5%	1.9%	2.2%	2.6%
India	0.6%	0.7%	0.9%	1.1%	1.3%	1.4%
Indonesia	0.5%	0.6%	0.8%	1.0%	1.2%	1.4%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets; *forecast from Sep 2014; **excludes Hong Kong
Source: eMarketer, Dec 2014

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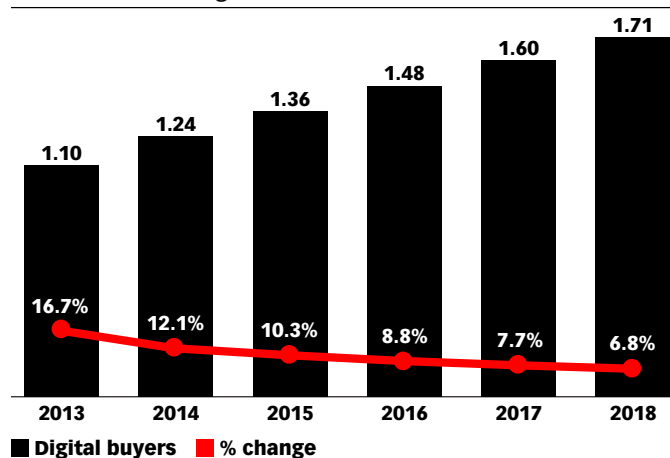
DIGITAL BUYERS AND SHOPPERS

eMarketer's global ecommerce forecast includes estimates for digital shoppers—that is, consumers who search for and look at products online, whether or not they actually purchase online—and for digital buyers.

DIGITAL BUYERS

Nearly 128 million consumers worldwide will become digital buyers in 2015, bringing the global total to 1.36 billion. 2015's 10.3% growth rate by this metric will be a decrease from previous years, however. As the base of digital buyers expands each year, the overall growth rate will continue to slow. In developed markets, the pool of potential new digital buyers is diminishing. Even so, the absolute number of new digital buyers will exceed 100 million each year through 2018, driven in large measure by growth in emerging markets where internet access is becoming more widely available.

Digital Buyers Worldwide, 2013-2018 billions and % change



Note: CAGR (2013-2018)=9.1%; ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases
Source: eMarketer, Dec 2014

183157

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China will have 364.1 million digital buyers in 2015, more than twice as many as the No. 2 nation by this measure, the US, with 171.2 million. Combined, the US and China will account for nearly 40% of the world's digital buyers this year. Of the other countries tracked, the most notable change in this forecast from our September 2014 version is that Indonesia now has roughly 5 million more buyers than estimated previously. The increase follows a large jump in ecommerce adoption in Indonesia by residents outside of the country's major cities.

Digital Buyers Worldwide, by Country, 2013-2018 millions

	2013	2014	2015	2016	2017	2018
China*	269.4	312.9	364.1	413.3	460.5	499.6
US**	157.1	164.2	171.2	178.1	184.5	190.3
Japan	72.4	75.0	77.0	78.3	79.5	80.3
Germany	43.3	45.6	47.1	47.9	48.5	49.1
India	30.9	41.6	52.1	61.3	70.6	81.1
UK**	38.3	39.5	40.4	41.4	42.1	42.6
Brazil	28.7	34.6	38.0	41.7	43.6	46.9
Russia	27.4	30.6	32.9	34.5	35.5	36.6
France	28.1	30.5	31.3	32.1	32.7	33.3
South Korea	25.6	26.6	27.6	28.2	28.7	29.3
Canada	15.8	16.9	18.0	18.6	19.2	19.5
Spain	15.4	16.8	18.1	19.1	20.0	20.8
Italy	13.9	15.1	16.2	17.4	18.3	19.0
Mexico	11.6	14.3	16.2	18.3	20.0	21.9
Australia	7.9	12.9	19.1	25.0	30.3	36.0
Indonesia	11.4	11.8	12.1	12.4	12.6	12.9
Argentina	9.1	10.2	11.2	11.7	12.2	12.5
Netherlands	9.2	9.6	9.9	10.2	10.3	10.4
Sweden	5.3	5.4	5.5	5.6	5.7	5.8
Denmark	3.3	3.3	3.4	3.5	3.6	3.6
Finland	2.6	2.7	2.8	3.0	3.1	3.2
Norway	2.4	2.5	2.6	2.7	2.8	2.9

Worldwide* 1,103.1 1,236.4 1,364.1 1,484.3 1,597.9 1,706.5**

Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases; *excludes Hong Kong; **forecast from Sep 2014; ***includes countries not listed

Source: eMarketer, Dec 2014

183158

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China's tally of digital buyers makes it home to more than a quarter of all digital buyers in the world. By comparison, its closest competitor in total population, India, will account for only 3.8% of global digital buyers in 2015.

Digital Buyer Share Worldwide, by Country, 2013-2018 % of total

	2013	2014	2015	2016	2017	2018
China*	24.4%	25.3%	26.7%	27.8%	28.8%	29.3%
US**	14.2%	13.3%	12.5%	12.0%	11.5%	11.2%
Japan	6.6%	6.1%	5.6%	5.3%	5.0%	4.7%
Germany	3.9%	3.7%	3.5%	3.2%	3.0%	2.9%
India	2.8%	3.4%	3.8%	4.1%	4.4%	4.8%
UK**	3.5%	3.2%	3.0%	2.8%	2.6%	2.5%
Brazil	2.6%	2.8%	2.8%	2.8%	2.7%	2.7%
France	2.5%	2.5%	2.3%	2.2%	2.0%	2.0%
Russia	2.5%	2.5%	2.4%	2.3%	2.2%	2.1%
South Korea	2.3%	2.1%	2.0%	1.9%	1.8%	1.7%
Canada	1.4%	1.4%	1.3%	1.3%	1.2%	1.1%
Spain	1.4%	1.4%	1.3%	1.3%	1.3%	1.2%
Italy	1.3%	1.2%	1.2%	1.2%	1.1%	1.1%
Mexico	1.0%	1.2%	1.2%	1.2%	1.3%	1.3%
Australia	1.0%	1.0%	0.9%	0.8%	0.8%	0.8%
Indonesia	0.7%	1.0%	1.4%	1.7%	1.9%	2.1%
Argentina	0.8%	0.8%	0.8%	0.8%	0.8%	0.7%
Netherlands	0.8%	0.8%	0.7%	0.7%	0.6%	0.6%
Sweden	0.5%	0.4%	0.4%	0.4%	0.4%	0.3%
Denmark	0.3%	0.3%	0.3%	0.2%	0.2%	0.2%
Finland	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
Norway	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%

Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases; *excludes Hong Kong; **forecast from Sep 2014

Source: eMarketer, Dec 2014

183163

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When it comes to digital buyer penetration as a percentage of the overall population, smaller countries lead the list. The UK and Denmark will be tops by this metric, with close to three-quarters of each country's population digital buyers in 2015. China, by contrast, will sit below 32%, so its already sizeable number of digital buyers still has a long way to grow.

Digital Buyer Penetration Worldwide, by Country, 2013-2018

% of population

	2013	2014	2015	2016	2017	2018
UK*	71.4%	73.2%	74.3%	75.6%	76.3%	76.7%
Denmark	70.2%	71.1%	72.4%	73.9%	75.3%	76.1%
Netherlands	64.9%	67.8%	69.5%	70.6%	71.1%	71.4%
Japan	65.0%	67.3%	69.0%	70.3%	71.4%	72.2%
Sweden	64.9%	66.1%	67.0%	67.8%	68.6%	68.6%
Germany	60.7%	63.9%	66.2%	67.4%	68.4%	69.2%
Australia	61.6%	63.1%	64.0%	64.7%	65.3%	65.8%
US*	60.6%	62.8%	64.9%	67.0%	68.9%	70.5%
South Korea	60.3%	62.2%	64.1%	65.3%	66.4%	67.5%
Finland	58.0%	60.3%	63.0%	65.7%	68.2%	70.7%
Norway	56.9%	58.5%	60.1%	61.7%	63.3%	64.9%
Canada	53.4%	56.8%	59.8%	61.5%	63.0%	63.9%
France	51.7%	55.8%	57.0%	58.1%	58.9%	59.8%
Argentina	27.9%	31.0%	33.5%	34.6%	35.6%	36.3%
Spain	28.2%	30.6%	32.9%	34.7%	36.3%	37.7%
Italy	25.9%	28.2%	30.0%	32.2%	33.7%	34.9%
China**	23.8%	27.5%	31.8%	35.9%	39.9%	43.2%
Russia	22.6%	25.4%	27.4%	28.8%	29.8%	30.7%
Brazil	18.4%	21.9%	23.7%	25.7%	26.5%	28.2%
Mexico	9.7%	11.9%	13.3%	14.8%	16.1%	17.4%
Indonesia	4.2%	6.7%	9.8%	12.7%	15.1%	17.8%
India	3.5%	4.6%	5.6%	6.5%	7.4%	8.4%
Worldwide***	18.8%	20.8%	22.6%	24.3%	25.8%	27.3%

Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases; ; *forecast from Sep 2014; **excludes Hong Kong; ***includes countries not listed

Source: eMarketer, Dec 2014

183162

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The UK will also have the highest percentage of internet users who will be digital buyers: 88.2% in 2015. Japan and Germany will follow, at 82.0% and 81.8%, respectively. Notably, Germany's penetration rate by this metric will move into third place this year, past Denmark.

Digital Buyer Penetration Worldwide, by Country, 2013-2018

% of internet users

	2013	2014	2015	2016	2017	2018
UK*	87.2%	88.0%	88.2%	88.9%	89.0%	89.0%
Japan	80.3%	81.3%	82.0%	82.5%	83.3%	83.7%
Denmark	80.7%	80.8%	81.3%	82.0%	83.6%	84.5%
Germany	79.1%	80.1%	81.8%	82.6%	83.4%	84.2%
Australia	77.2%	78.6%	79.4%	80.0%	80.5%	81.0%
Netherlands	74.6%	77.0%	78.0%	79.3%	79.8%	80.2%
Sweden	76.3%	76.8%	77.8%	78.7%	79.6%	79.7%
Norway	73.6%	75.5%	77.7%	80.2%	83.0%	84.7%
US*	73.0%	74.4%	75.6%	77.0%	78.4%	79.6%
South Korea	71.1%	73.0%	74.9%	76.0%	77.0%	78.0%
France	66.5%	70.7%	71.3%	71.8%	72.0%	72.5%
Finland	68.4%	70.3%	72.5%	74.9%	77.0%	79.0%
Canada	63.1%	66.2%	68.9%	70.1%	71.0%	72.0%
Spain	54.5%	57.0%	60.0%	62.0%	64.0%	65.8%
China**	49.3%	55.2%	61.7%	67.0%	71.0%	73.0%
Argentina	45.7%	47.4%	48.3%	49.0%	49.7%	50.1%
Italy	44.1%	46.3%	48.7%	51.0%	53.0%	54.7%
Russia	39.7%	41.6%	42.5%	42.5%	42.5%	42.7%
Brazil	36.0%	39.7%	41.0%	42.5%	43.0%	45.0%
Mexico	28.4%	31.3%	32.3%	33.3%	34.0%	34.9%
India	23.5%	24.4%	26.0%	27.0%	28.0%	29.0%
Indonesia	13.5%	19.0%	25.0%	29.6%	32.6%	35.3%
Worldwide***	45.7%	47.5%	49.2%	50.6%	51.6%	52.2%

Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases; *forecast from Sep 2014; **excludes Hong Kong; ***includes countries not listed

Source: eMarketer, Dec 2014

183160

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On a regional basis, 45.1% of global digital buyers will reside in Asia-Pacific this year. These 615.6 million digital buyers, however, will represent less than half of Asia-Pacific's internet users. (For comparison, nearly three-quarters of internet users in North America will be digital buyers in 2015.) But Asia-Pacific's 3.1 percentage point growth by this metric will outpace any other region in 2015.

Digital Buyer Metrics Worldwide, by Region, 2013-2018

	2013	2014	2015	2016	2017	2018
Digital buyers (millions)						
Asia-Pacific	468.2	537.2	615.6	688.5	758.9	821.3
Western Europe	183.0	193.7	201.1	207.3	212.2	216.6
North America	172.8	181.1	189.1	196.7	203.8	209.8
Middle East & Africa	109.7	128.1	143.5	160.6	179.4	200.6
Latin America	83.0	99.9	111.1	122.3	130.3	140.8
Central & Eastern Europe	86.4	96.4	103.7	108.8	113.3	117.4
Worldwide	1,103.1	1,236.4	1,364.1	1,484.3	1,597.9	1,706.5
Digital buyer share (% of total)						
Asia-Pacific	42.4%	43.4%	45.1%	46.4%	47.5%	48.1%
Western Europe	16.6%	15.7%	14.7%	14.0%	13.3%	12.7%
North America	15.7%	14.7%	13.9%	13.3%	12.8%	12.3%
Middle East & Africa	9.9%	10.4%	10.5%	10.8%	11.2%	11.8%
Latin America	7.5%	8.1%	8.1%	8.2%	8.2%	8.2%
Central & Eastern Europe	4.8%	7.8%	7.6%	7.3%	7.1%	6.9%
Digital buyer penetration (% of internet users)						
North America	72.0%	73.6%	74.9%	76.3%	77.6%	78.7%
Western Europe	64.1%	66.0%	67.4%	68.5%	69.4%	70.3%
Asia-Pacific	42.6%	44.8%	47.9%	50.2%	52.0%	52.8%
Central & Eastern Europe	41.6%	43.4%	44.3%	44.4%	44.6%	44.6%
Latin America	35.6%	38.8%	39.9%	41.0%	41.5%	42.5%
Middle East & Africa	31.3%	33.1%	34.0%	35.0%	36.0%	37.0%
Worldwide	45.7%	47.5%	49.2%	50.6%	51.6%	52.2%

Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases

Source: eMarketer, Dec 2014

183197

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In general, the biggest percentage growth in digital buyers will come in the large, fast-growing Asia-Pacific economies. Indonesia and India will lead the pack with nearly identical 25.5% and 25.4% growth rates, respectively, while China follows at 16.3%. The only other country of those tracked by eMarketer to have double-digit growth by this metric will be Mexico.

Digital Buyer Growth Worldwide, by Country, 2013-2018

% change

	2013	2014	2015	2016	2017	2018
Indonesia	112.6%	62.7%	47.8%	31.0%	21.1%	18.8%
India	40.5%	34.7%	25.4%	17.5%	15.2%	14.9%
Mexico	31.9%	23.9%	13.4%	12.5%	9.7%	9.5%
Brazil	18.1%	20.4%	9.7%	9.8%	4.7%	7.4%
China*	23.1%	16.2%	16.3%	13.5%	11.4%	8.5%
Argentina	13.9%	12.6%	9.3%	4.4%	4.1%	3.1%
Russia	13.5%	11.9%	7.5%	4.7%	3.2%	3.0%
Italy	9.2%	9.2%	6.8%	7.8%	4.8%	3.8%
Spain	9.9%	8.7%	7.8%	5.6%	4.8%	4.1%
France	6.0%	8.5%	2.7%	2.5%	1.8%	2.0%
Canada	9.3%	7.3%	6.1%	3.7%	3.2%	1.4%
Germany	5.1%	5.2%	3.4%	1.6%	1.3%	1.1%
Netherlands	2.9%	5.2%	3.1%	2.2%	1.3%	1.0%
US**	5.1%	4.6%	4.2%	4.1%	3.6%	3.1%
Norway	4.3%	4.2%	4.0%	3.8%	3.7%	3.6%
Finland	3.3%	4.1%	4.5%	4.4%	3.8%	3.6%
South Korea	8.8%	4.0%	3.7%	2.2%	2.0%	1.9%
Australia	4.6%	3.7%	2.6%	2.3%	2.0%	1.9%
Japan	8.5%	3.5%	2.7%	1.8%	1.5%	1.0%
UK**	5.8%	3.2%	2.3%	2.4%	1.6%	1.2%
Sweden	3.5%	2.5%	1.9%	1.9%	1.8%	0.8%
Denmark	6.5%	1.8%	2.3%	2.5%	2.3%	1.4%
Worldwide***	16.7%	12.1%	10.3%	8.8%	7.7%	6.8%

Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases; *excludes Hong Kong; **forecast from Sep 2014; ***includes countries not listed

Source: eMarketer, Dec 2014

183309

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DIGITAL SHOPPERS

eMarketer defines digital shoppers as internet users who have browsed, researched or compared products using the internet via any device in a calendar year but have not necessarily made a purchase using the internet. Our estimates for digital shoppers cover a smaller group of countries than the digital buyer forecast. The forecast itself has remained essentially stable since eMarketer's last update.

Digital Shoppers in Select Countries, 2013-2018

millions

	2013	2014	2015	2016	2017	2018
US*	191.1	197.8	204.2	210.0	215.6	220.7
Brazil	62.7	71.8	80.0	87.3	93.4	99.0
India	62.3	66.7	70.9	75.0	78.0	88.0
Indonesia	41.7	53.5	67.3	74.4	83.0	91.7
Germany	49.2	51.2	52.6	53.0	53.6	54.1
UK*	40.6	41.8	42.9	43.7	44.4	45.0
Canada	19.5	20.2	20.9	21.5	22.2	22.5
Netherlands	10.6	10.9	11.1	11.2	11.3	11.4
Sweden	6.2	6.3	6.3	6.4	6.5	6.5
Denmark	3.5	3.6	3.7	3.8	3.8	3.9
Finland	3.1	3.2	3.3	3.4	3.5	3.6
Norway	3.1	3.2	3.3	3.4	3.5	3.6

Note: ages 14+; internet users who have browsed, researched or compared products digitally via any device during the calendar year but have not necessarily bought digitally; *forecast from Sep 2014

Source: eMarketer, Dec 2014

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When it comes to percentage of digital shoppers among internet users, seven of the world's top 10 countries are in Europe, reflecting the advanced state of their ecommerce markets. More than 94% of UK internet users will be digital shoppers in 2015—the global leader by this measure. Germany will rank second globally, at 91.3%, followed by the US at 90.2%. In fact, all of the countries tracked will see digital shopper penetration of at least 80%, with the exception of India.

Digital Shopper Penetration in Select Countries, 2013-2018

% of internet users

	2013	2014	2015	2016	2017	2018
UK*	93.2%	93.9%	94.4%	94.8%	95.0%	95.0%
Germany	89.9%	90.1%	91.3%	91.4%	92.0%	93.0%
US*	88.8%	89.6%	90.2%	90.8%	91.6%	92.3%
Sweden	89.5%	89.1%	89.6%	90.0%	90.3%	90.4%
Denmark	86.5%	87.8%	88.6%	88.4%	89.0%	90.0%
Netherlands	86.6%	86.9%	87.0%	87.4%	87.8%	88.0%
Norway	82.4%	83.6%	85.4%	87.4%	89.0%	90.3%
Finland	81.6%	82.8%	84.7%	86.8%	88.6%	90.6%
Brazil	78.5%	82.4%	86.4%	89.0%	92.0%	95.0%
Canada	78.0%	79.0%	80.0%	81.0%	82.0%	83.2%
Indonesia	70.9%	78.7%	88.2%	88.1%	89.3%	90.0%
India	47.4%	39.1%	35.3%	33.1%	31.0%	31.5%

Note: ages 14+; internet users who have browsed, researched or compared products digitally via any device during the calendar year but have not necessarily bought digitally; *forecast from Sep 2014

Source: eMarketer, Dec 2014

183235

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Digital shopper penetration as a percentage of total population is similar between countries in Western Europe and North America, ranging from 78.9% in Denmark to 69.4% in Canada. But the percentages are notably lower in less advanced economies. Less than half of Brazil's population will shop digitally in 2015, as will just over a third of Indonesia's residents. In India, only 7.7% of the population will be digital shoppers in 2015.

Digital Shopper Penetration in Select Countries, 2013-2018

% of population

	2013	2014	2015	2016	2017	2018
Denmark	75.2%	77.3%	78.9%	79.6%	80.2%	81.1%
UK	75.7%	77.3%	78.8%	79.8%	80.6%	81.0%
Sweden	76.1%	76.7%	77.2%	77.5%	77.8%	77.9%
Netherlands	75.3%	76.5%	77.5%	77.8%	78.2%	78.4%
Norway	73.4%	75.3%	77.0%	78.8%	80.2%	81.4%
US*	73.8%	75.7%	77.5%	79.0%	80.5%	81.7%
Finland	69.2%	71.1%	73.6%	76.2%	78.5%	80.3%
Germany	69.0%	71.9%	73.9%	74.6%	75.5%	76.4%
Canada	66.0%	67.8%	69.4%	71.1%	72.8%	73.9%
Brazil	40.2%	45.5%	49.9%	53.8%	56.8%	59.4%
Indonesia	22.1%	27.9%	34.6%	37.7%	41.5%	45.3%
India	7.0%	7.3%	7.7%	8.0%	8.2%	9.1%

Note: ages 14+; internet users who have browsed, researched or compared products digitally via any device during the calendar year but have not necessarily bought digitally; *forecast from Sep 2014

Source: eMarketer, Dec 2014

183237

www.eMarketer.com

COMPLETE RETAIL ECOMMERCE FORECAST

Country-level and regional charts for eMarketer's 2013–2018 retail ecommerce forecast can be found below, organized by region.

ASIA-PACIFIC

Total Retail Sales in Asia-Pacific, by Country, 2013-2017

	2013	2014	2015	2016	2017
Total retail sales (billions)					
China*	\$3,783.78	\$4,237.84	\$4,704.00	\$5,174.40	\$5,640.09
Japan	\$1,423.20	\$1,453.78	\$1,482.85	\$1,520.81	\$1,555.84
India	\$635.25	\$717.83	\$818.33	\$941.08	\$1,082.24
South Korea	\$360.63	\$368.93	\$376.31	\$383.83	\$391.51
Indonesia	\$203.25	\$245.93	\$293.15	\$337.71	\$379.93
Australia	\$222.09	\$231.41	\$238.59	\$245.75	\$253.12
Other	\$1,137.71	\$1,250.40	\$1,385.51	\$1,530.20	\$1,667.47
Asia-Pacific	\$7,765.91	\$8,506.12	\$9,298.74	\$10,133.78	\$10,970.20

Total retail sales share (% of worldwide retail sales)

China*	17.9%	18.8%	19.7%	20.4%	21.0%
Japan	6.7%	6.5%	6.2%	6.0%	5.8%
India	3.0%	3.2%	3.4%	3.7%	4.0%
South Korea	1.7%	1.6%	1.6%	1.5%	1.5%
Indonesia	1.0%	1.1%	1.2%	1.3%	1.4%
Australia	1.0%	1.0%	1.0%	1.0%	0.9%
Other	5.4%	5.6%	5.8%	6.0%	6.2%
Asia-Pacific	36.6%	37.8%	38.9%	40.0%	40.9%

Note: excludes travel and event tickets; numbers may not add up to total due to rounding; *excludes Hong Kong
Source: eMarketer, Dec 2014

183061

www.eMarketer.com

Retail Ecommerce Sales in Asia-Pacific, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Retail ecommerce sales (billions)						
China*	\$315.75	\$426.26	\$562.66	\$714.58	\$871.79	\$1,011.28
Japan	\$62.13	\$70.83	\$79.33	\$88.06	\$96.87	\$106.07
South Korea	\$29.30	\$33.11	\$36.76	\$40.43	\$44.07	\$47.82
Australia	\$8.01	\$9.40	\$10.76	\$12.05	\$13.32	\$14.52
India	\$3.59	\$5.30	\$7.69	\$10.68	\$14.18	\$17.52
Indonesia	\$1.07	\$1.58	\$2.36	\$3.52	\$4.58	\$5.80
Other	\$40.01	\$50.77	\$65.82	\$83.88	\$103.33	\$121.89
Asia-Pacific	\$459.86	\$597.25	\$765.38	\$953.21	\$1,148.15	\$1,324.88

Retail ecommerce % of total retail sales

China*	8.3%	10.1%	12.0%	13.8%	15.5%	16.6%
South Korea	8.1%	9.0%	9.8%	10.5%	11.3%	12.0%
Japan	4.4%	4.9%	5.4%	5.8%	6.2%	6.7%
Australia	3.6%	4.1%	4.5%	4.9%	5.3%	5.6%
India	0.6%	0.7%	0.9%	1.1%	1.3%	1.4%
Indonesia	0.5%	0.6%	0.8%	1.0%	1.2%	1.4%
Other	3.5%	4.1%	4.8%	5.5%	6.2%	6.7%
Asia-Pacific	5.9%	7.0%	8.2%	9.4%	10.5%	11.2%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets; numbers may not add up to total due to rounding; *excludes Hong Kong
Source: eMarketer, Dec 2014

183112

www.eMarketer.com

Total Retail and Retail Ecommerce* Sales in Australia, 2013-2018

billions, % change and % of total retail sales

	2013	2014	2015	2016	2017	2018
Total retail sales						
	\$222.09	\$231.41	\$238.59	\$245.75	\$253.12	\$260.46
—% change	3.0%	4.2%	3.1%	3.0%	3.0%	2.9%
Retail ecommerce* sales						
	\$8.01	\$9.40	\$10.76	\$12.05	\$13.32	\$14.52
—% change	11.6%	17.3%	14.4%	12.0%	10.6%	9.0%
—% of total retail sales	3.6%	4.1%	4.5%	4.9%	5.3%	5.6%

Note: converted at exchange rate of US\$1=AUD1.04; excludes travel and event tickets; *includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment
Source: eMarketer, Dec 2014

183094

www.eMarketer.com

Total Retail and Retail Ecommerce* Sales in China, 2013-2018

billions, % change and % of total retail sales

	2013	2014	2015	2016	2017	2018
Total retail sales	\$3,783.78	\$4,237.84	\$4,704.00	\$5,174.40	\$5,640.09	\$6,091.30
—% change	13.1%	12.0%	11.0%	10.0%	9.0%	8.0%
Retail ecommerce* sales	\$315.75	\$426.26	\$562.66	\$714.58	\$871.79	\$1,011.28
—% change	47.0%	35.0%	32.0%	27.0%	22.0%	16.0%
—% of total retail sales	8.3%	10.1%	12.0%	13.8%	15.5%	16.6%

Note: excludes Hong Kong; converted at exchange rate of US\$1=RMB6.19; excludes travel and event tickets; *includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment

Source: eMarketer, Dec 2014

183093

www.eMarketer.com

Total Retail and Retail Ecommerce* Sales in Japan, 2013-2018

billions, % change and % of total retail sales

	2013	2014	2015	2016	2017	2018
Total retail sales	\$1,423.20	\$1,453.78	\$1,482.85	\$1,520.81	\$1,555.84	\$1,586.26
—% change	1.0%	2.1%	2.0%	2.6%	2.3%	2.0%
Retail ecommerce* sales	\$62.13	\$70.83	\$79.33	\$88.06	\$96.87	\$106.07
—% change	17.9%	14.0%	12.0%	11.0%	10.0%	9.5%
—% of total retail sales	4.4%	4.9%	5.4%	5.8%	6.2%	6.7%

Note: converted at the exchange rate of US\$1=¥97.60; excludes travel and event tickets; *includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment

Source: eMarketer, Dec 2014

183097

www.eMarketer.com

Total Retail and Retail Ecommerce* Sales in India, 2013-2018

billions, % change and % of total retail sales

	2013	2014	2015	2016	2017	2018
Total retail sales	\$635.25	\$717.83	\$818.33	\$941.08	\$1,082.24	\$1,244.58
—% change	10.0%	13.0%	14.0%	15.0%	15.0%	15.0%
Retail ecommerce* sales	\$3.59	\$5.30	\$7.69	\$10.68	\$14.18	\$17.52
—% change	55.6%	47.6%	45.2%	38.9%	32.8%	23.5%
—% of total retail sales	0.6%	0.7%	0.9%	1.1%	1.3%	1.4%

Note: converted at the exchange rate of US\$1=INR58.52; excludes travel and event tickets; *includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment

Source: eMarketer, Dec 2014

183095

www.eMarketer.com

Total Retail and Retail Ecommerce* Sales in South Korea, 2013-2018

billions, % change and % of total retail sales

	2013	2014	2015	2016	2017	2018
Total retail sales	\$360.63	\$368.93	\$376.31	\$383.83	\$391.51	\$398.95
—% change	2.5%	2.3%	2.0%	2.0%	2.0%	1.9%
Retail ecommerce* sales	\$29.30	\$33.11	\$36.76	\$40.43	\$44.07	\$47.82
—% change	12.6%	13.0%	11.0%	10.0%	9.0%	8.5%
—% of total retail sales	8.1%	9.0%	9.8%	10.5%	11.3%	12.0%

Note: converted at the exchange rate of US\$1=KRW1,094.70; excludes travel and event tickets; *includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment

Source: eMarketer, Dec 2014

183098

www.eMarketer.com

Total Retail and Retail Ecommerce* Sales in Indonesia, 2013-2018

billions, % change and % of total retail sales

	2013	2014	2015	2016	2017	2018
Total retail sales	\$203.25	\$245.93	\$293.15	\$337.71	\$379.93	\$416.02
—% change	22.0%	21.0%	19.2%	15.2%	12.5%	9.5%
Retail ecommerce* sales	\$1.07	\$1.58	\$2.36	\$3.52	\$4.58	\$5.80
—% change	78.0%	47.9%	49.9%	49.1%	30.0%	26.5%
—% of total retail sales	0.5%	0.6%	0.8%	1.0%	1.2%	1.4%

Note: converted at the exchange rate of US\$1=IDR1,0432.2; excludes travel and event tickets; *includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment

Source: eMarketer, Dec 2014

183096

www.eMarketer.com

Digital Buyers in Asia-Pacific, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Digital buyers (millions)						
China*	269.4	312.9	364.1	413.3	460.5	499.6
Japan	72.4	75.0	77.0	78.3	79.5	80.3
India	30.9	41.6	52.1	61.3	70.6	81.1
South Korea	25.6	26.6	27.6	28.2	28.7	29.3
Indonesia	7.9	12.9	19.1	25.0	30.3	36.0
Australia	11.4	11.8	12.1	12.4	12.6	12.9
Other	50.6	56.4	63.6	70.1	76.8	82.1
Asia-Pacific	468.2	537.2	615.6	688.5	758.9	821.3

Digital buyer penetration (% of internet users)

	2013	2014	2015	2016	2017	2018
Japan	80.3%	81.3%	82.0%	82.5%	83.3%	83.7%
Australia	77.2%	78.6%	79.4%	80.0%	80.5%	81.0%
South Korea	71.1%	73.0%	74.9%	76.0%	77.0%	78.0%
China*	49.3%	55.2%	61.7%	67.0%	71.0%	73.0%
India	23.5%	24.4%	26.0%	27.0%	28.0%	29.0%
Indonesia	13.5%	19.0%	25.0%	29.6%	32.6%	35.3%
Other	29.7%	29.9%	31.1%	31.9%	32.6%	32.6%
Asia-Pacific	42.6%	44.8%	47.9%	50.2%	52.0%	52.8%

Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases; numbers may not add up to total due to rounding;

*excludes Hong Kong

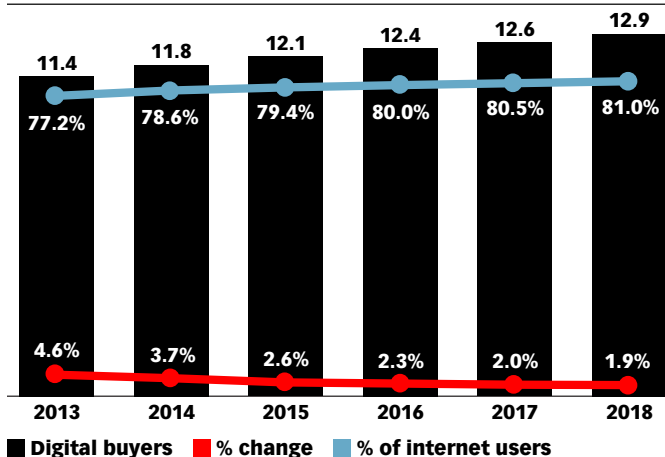
Source: eMarketer, Dec 2014

183199

www.eMarketer.com

Digital Buyers in Australia, 2013-2018

millions, % change and % of internet users



Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases

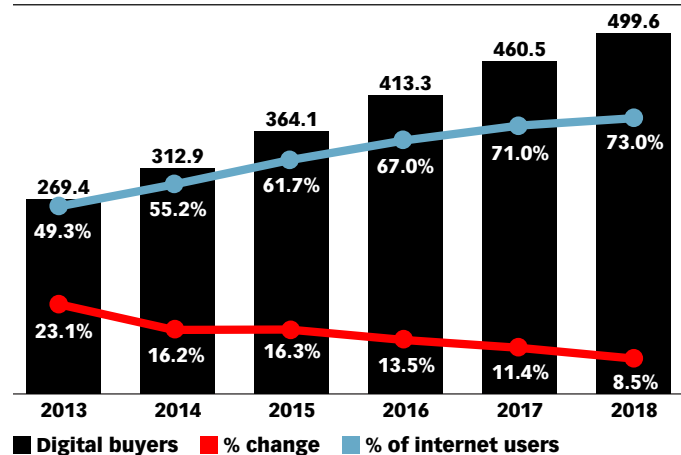
Source: eMarketer, Dec 2014

183203

www.eMarketer.com

Digital Buyers in China, 2013-2018

millions, % change and % of internet users



Note: excludes Hong Kong; ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases

Source: eMarketer, Dec 2014

183202

www.eMarketer.com

Digital Shoppers* and Buyers** in India, 2013-2018

	2013	2014	2015	2016	2017	2018
Digital shoppers* (millions)						
	62.3	66.7	70.9	75.0	78.0	88.0
—% change	8.2%	7.1%	6.3%	5.8%	4.0%	12.9%
—% of internet users	47.4%	39.1%	35.3%	33.1%	31.0%	31.5%
Digital buyers** (millions)						
	30.9	41.6	52.1	61.3	70.6	81.1
—% change	40.5%	34.7%	25.4%	17.5%	15.2%	14.9%
—% of internet users	23.5%	24.4%	26.0%	27.0%	28.0%	29.0%

Note: ages 14+; *internet users who have browsed, researched or compared products digitally via any device during the calendar year but have not necessarily bought digitally; **internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases

Source: eMarketer, Dec 2014

183204

www.eMarketer.com

Digital Shoppers* and Buyers** in Indonesia, 2013-2018

	2013	2014	2015	2016	2017	2018
Digital shoppers* (millions)						
	41.7	53.5	67.3	74.4	83.0	91.7
—% change	45.7%	28.4%	25.8%	10.6%	11.5%	10.6%
—% of internet users	70.9%	78.7%	88.2%	88.1%	89.3%	90.0%
Digital buyers** (millions)						
	7.9	12.9	19.1	25.0	30.3	36.0
—% change	112.6%	62.7%	47.8%	31.0%	21.1%	18.8%
—% of internet users	13.5%	19.0%	25.0%	29.6%	32.6%	35.3%

Note: ages 14+; *internet users who have browsed, researched or compared products digitally via any device during the calendar year but have not necessarily bought digitally; **internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases

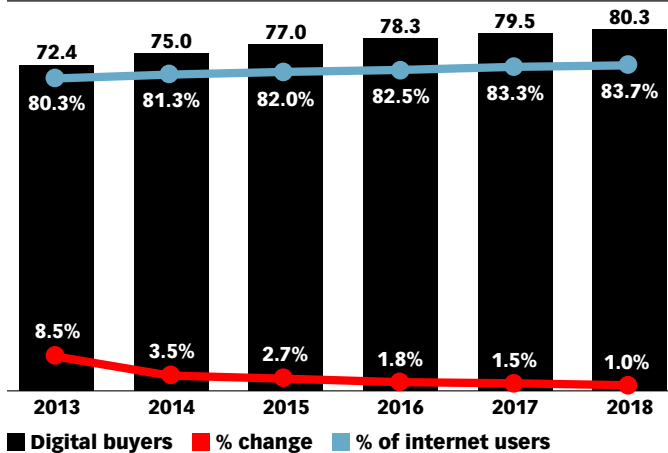
Source: eMarketer, Dec 2014

183205

www.eMarketer.com

Digital Buyers in Japan, 2013-2018

millions, % change and % of internet users



Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases

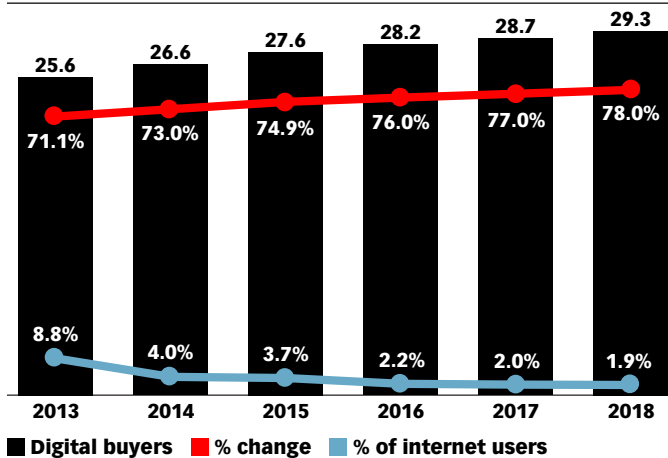
Source: eMarketer, Dec 2014

183206

www.eMarketer.com

Digital Buyers in South Korea, 2013-2018

millions, % change and % of internet users



Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases

Source: eMarketer, Dec 2014

183207

www.eMarketer.com

CENTRAL AND EASTERN EUROPE

Total Retail Sales in Central & Eastern Europe, by Country, 2013-2017

	2013	2014	2015	2016	2017
Total retail sales (billions)					
Russia	\$743.03	\$794.30	\$845.93	\$900.06	\$959.92
Other	\$1,063.88	\$1,138.59	\$1,216.70	\$1,296.30	\$1,400.54
Central & Eastern Europe	\$1,806.91	\$1,932.89	\$2,062.63	\$2,196.37	\$2,360.46
Total retail sales share (% of worldwide retail sales)					
Russia	3.5%	3.5%	3.5%	3.5%	3.6%
Other	5.0%	5.1%	5.1%	5.1%	5.2%
Central & Eastern Europe	8.5%	8.6%	8.6%	8.7%	8.8%

Note: excludes travel and event tickets; numbers may not add up to total due to rounding

Source: eMarketer, Dec 2014

183067

www.eMarketer.com

Retail Ecommerce Sales in Central & Eastern Europe, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Retail ecommerce sales (billions)						
Russia	\$15.06	\$17.47	\$20.30	\$23.40	\$26.88	\$30.91
Other	\$26.63	\$30.94	\$36.07	\$41.64	\$48.48	\$56.17
Central & Eastern Europe	\$41.69	\$48.41	\$56.38	\$65.04	\$75.36	\$87.08
Retail ecommerce % of total retail sales						
Russia	2.0%	2.2%	2.4%	2.6%	2.8%	3.0%
Other	2.5%	2.7%	3.0%	3.2%	3.5%	3.7%
Central & Eastern Europe	2.3%	2.5%	2.7%	3.0%	3.2%	3.4%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets; numbers may not add up to total due to rounding

Source: eMarketer, Dec 2014

183114

www.eMarketer.com

Digital Buyers in Central & Eastern Europe, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Digital buyers (millions)						
Russia	27.4	30.6	32.9	34.5	35.5	36.6
Other	59.0	65.8	70.8	74.4	77.8	80.7
Central & Eastern Europe	86.4	96.4	103.7	108.8	113.3	117.4
Digital buyer penetration (% of internet users)						
Russia	39.7%	41.6%	42.5%	42.5%	42.5%	42.7%
Other	42.5%	44.3%	45.2%	45.4%	45.6%	45.5%
Central & Eastern Europe	41.6%	43.4%	44.3%	44.4%	44.6%	44.6%

Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases; numbers may not add up to total due to rounding

Source: eMarketer, Dec 2014

183220

www.eMarketer.com

LATIN AMERICA

Total Retail Sales in Latin America, by Country, 2013-2017

	2013	2014	2015	2016	2017
Total retail sales (billions)					
Brazil	\$395.90	\$428.76	\$460.06	\$490.42	\$517.89
Mexico	\$355.78	\$366.45	\$386.60	\$405.93	\$426.23
Argentina	\$181.21	\$239.20	\$299.00	\$337.87	\$371.65
Other	\$507.17	\$560.91	\$636.61	\$691.43	\$725.37
Latin America	\$1,440.05	\$1,595.32	\$1,728.27	\$1,925.65	\$2,041.14

Total retail sales share (% of worldwide retail sales)

	2013	2014	2015	2016	2017
Brazil	1.9%	1.9%	1.9%	1.9%	1.9%
Mexico	1.7%	1.6%	1.6%	1.6%	1.6%
Argentina	0.9%	1.1%	1.2%	1.3%	1.4%
Other	2.4%	2.5%	2.7%	2.7%	2.7%
Latin America	6.8%	7.1%	7.4%	7.6%	7.6%

Note: excludes travel and event tickets; numbers may not add up to total due to rounding

Source: eMarketer, Dec 2014

183074

www.eMarketer.com

Retail Ecommerce Sales in Latin America, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Retail ecommerce sales (billions)						
Brazil	\$13.34	\$16.28	\$18.80	\$21.34	\$23.79	\$26.17
Mexico	\$3.46	\$4.57	\$5.94	\$7.54	\$9.43	\$11.50
Argentina	\$2.33	\$3.33	\$4.67	\$6.44	\$8.31	\$9.97
Other	\$10.40	\$13.11	\$16.34	\$19.79	\$22.90	\$25.32
Latin America	\$29.54	\$37.29	\$45.75	\$55.12	\$64.43	\$72.97
Retail ecommerce % of total retail sales						
Brazil	3.4%	3.8%	4.1%	4.4%	4.6%	4.8%
Argentina	1.3%	1.4%	1.6%	1.9%	2.2%	2.5%
Mexico	1.0%	1.2%	1.5%	1.9%	2.2%	2.6%
Other	2.1%	2.3%	2.6%	2.9%	3.2%	3.4%
Latin America	2.1%	2.3%	2.6%	2.9%	3.2%	3.4%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets; numbers may not add up to total due to rounding

Source: eMarketer, Dec 2014

183117

www.eMarketer.com

Total Retail and Retail Ecommerce* Sales in Argentina, 2013-2018

billions, % change and % of total retail sales

	2013	2014	2015	2016	2017	2018
Total retail sales	\$181.21	\$239.20	\$299.00	\$337.87	\$371.65	\$405.10
—% change	28.0%	32.0%	25.0%	13.0%	10.0%	9.0%
Retail ecommerce* sales	\$2.33	\$3.33	\$4.67	\$6.44	\$8.31	\$9.97
—% change	41.1%	43.0%	40.0%	38.0%	29.0%	20.0%
—% of total retail sales	1.3%	1.4%	1.6%	1.9%	2.2%	2.5%

Note: converted at the exchange rate of US\$1=ARS7.8053; excludes travel and event tickets; *includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment

Source: eMarketer, Dec 2014

183099

www.eMarketer.com

Total Retail and Retail Ecommerce* Sales in Brazil, 2013-2018

billions, % change and % of total retail sales

	2013	2014	2015	2016	2017	2018
Total retail sales	\$395.90	\$428.76	\$460.06	\$490.42	\$517.89	\$545.33
—% change	7.0%	8.3%	7.3%	6.6%	5.6%	5.3%
Retail ecommerce* sales	\$13.34	\$16.28	\$18.80	\$21.34	\$23.79	\$26.17
—% change	28.0%	22.0%	15.5%	13.5%	11.5%	10.0%
—% of total retail sales	3.4%	3.8%	4.1%	4.4%	4.6%	4.8%

Note: converted at the exchange rate of US\$1=BRL2.16; excludes travel and event tickets; *includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment

Source: eMarketer, Dec 2014

183100

www.eMarketer.com

Total Retail and Retail Ecommerce* Sales in Mexico, 2013-2018

billions, % change and % of total retail sales

	2013	2014	2015	2016	2017	2018
Total retail sales	\$355.78	\$366.45	\$386.60	\$405.93	\$426.23	\$445.41
—% change	2.0%	3.0%	5.5%	5.0%	5.0%	4.5%
Retail ecommerce* sales	\$3.46	\$4.57	\$5.94	\$7.54	\$9.43	\$11.50
—% change	50.0%	32.0%	30.0%	27.0%	25.0%	22.0%
—% of total retail sales	1.0%	1.2%	1.5%	1.9%	2.2%	2.6%

Note: converted at the exchange rate of US\$1=MXN12.76; excludes travel and event tickets; *includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment

Source: eMarketer, Dec 2014

183101

www.eMarketer.com

Digital Buyers in Latin America, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Digital buyers (millions)						
Brazil	28.7	34.6	38.0	41.7	43.6	46.9
Mexico	11.6	14.3	16.2	18.3	20.0	21.9
Argentina	9.1	10.2	11.2	11.7	12.2	12.5
Other	33.6	40.7	45.8	50.6	54.5	59.4
Latin America	83.0	99.9	111.1	122.3	130.3	140.8
Digital buyer penetration (% of internet users)						
Argentina	45.7%	47.4%	48.3%	49.0%	49.7%	50.1%
Brazil	36.0%	39.7%	41.0%	42.5%	43.0%	45.0%
Mexico	28.4%	31.3%	32.3%	33.3%	34.0%	34.9%
Other	36.4%	39.6%	40.6%	41.7%	42.1%	42.7%
Latin America	35.6%	38.8%	39.9%	41.0%	41.5%	42.5%

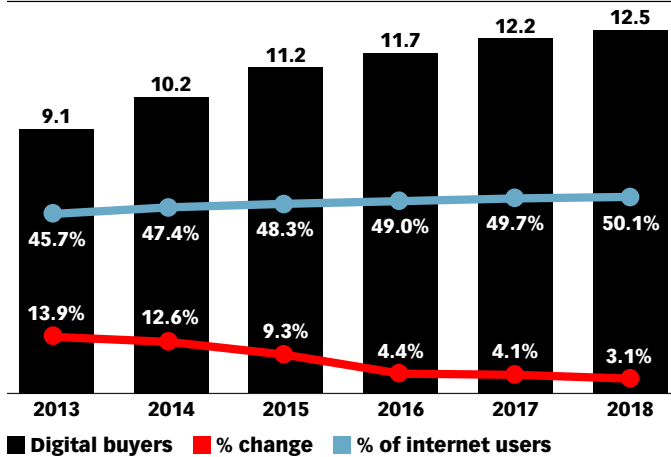
Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases; numbers may not add up to total due to rounding
Source: eMarketer, Dec 2014

183221

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Digital Buyers in Argentina, 2013-2018

millions, % change and % of internet users



Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases
Source: eMarketer, Dec 2014

183223

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Digital Shoppers* and Buyers** in Brazil, 2013-2018

	2013	2014	2015	2016	2017	2018
Digital shoppers* (millions)						
—	62.7	71.8	80.0	87.3	93.4	99.0
—% change	17.4%	14.6%	11.4%	9.1%	7.0%	6.0%
—% of internet users	78.5%	82.4%	86.4%	89.0%	92.0%	95.0%
Digital buyers** (millions)						
—	28.7	34.6	38.0	41.7	43.6	46.9
—% change	18.1%	20.4%	9.7%	9.8%	4.7%	7.4%
—% of internet users	36.0%	39.7%	41.0%	42.5%	43.0%	45.0%

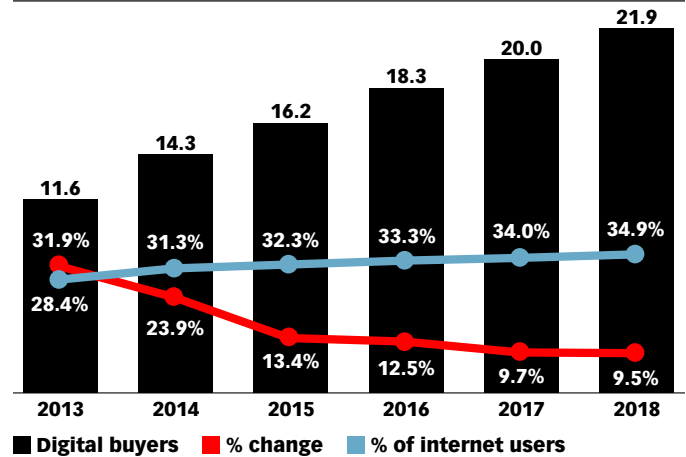
Note: ages 14+; *internet users who have browsed, researched or compared products digitally via any device during the calendar year but have not necessarily bought digitally; **internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases
Source: eMarketer, Dec 2014

183224

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Digital Buyers in Mexico, 2013-2018

millions, % change and % of internet users



Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases
Source: eMarketer, Dec 2014

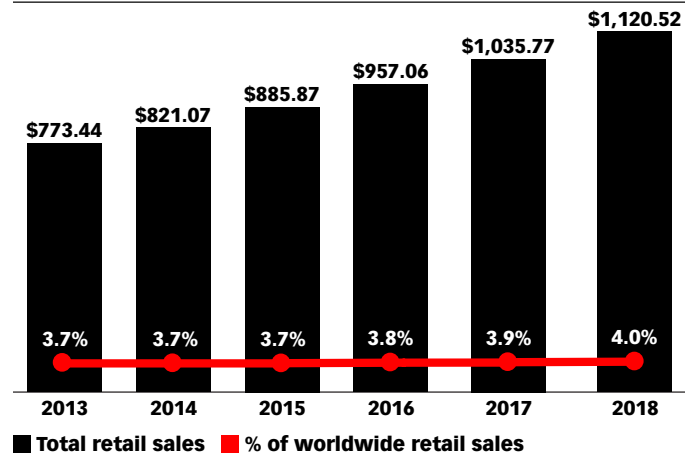
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MIDDLE EAST AND AFRICA

Total Retail Sales in the Middle East & Africa, 2013-2018

billions and % of worldwide retail sales



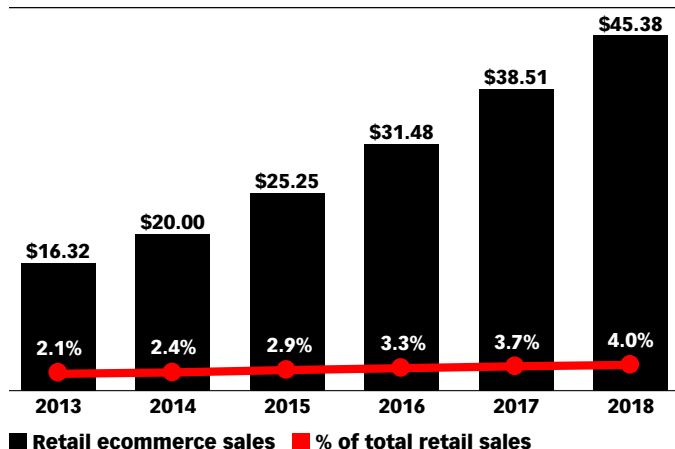
Note: excludes travel and event tickets
Source: eMarketer, Dec 2014

183075

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Retail Ecommerce Sales in the Middle East & Africa, 2013-2018

billions and % of total retail sales



Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets

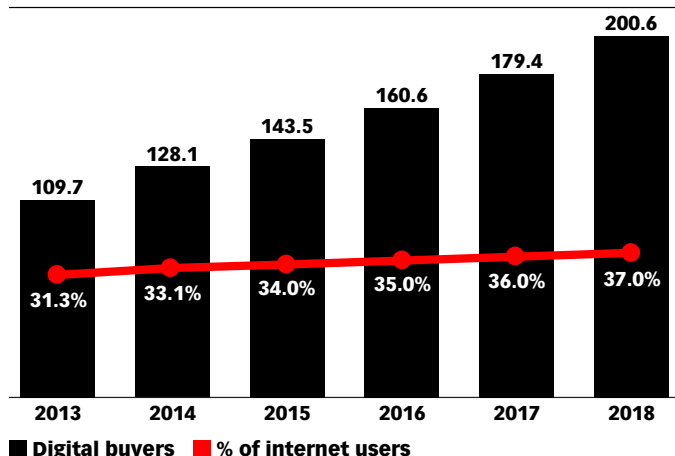
Source: eMarketer, Dec 2014

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Digital Buyers in the Middle East & Africa, 2013-2018

millions and % of internet users



Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases

Source: eMarketer, Dec 2014

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NORTH AMERICA

Total Retail Sales in North America, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Total retail sales (billions)						
US*	\$4,528.22	\$4,706.21	\$4,908.58	\$5,104.92	\$5,309.12	\$5,521.49
Canada	\$467.74	\$478.03	\$488.07	\$498.32	\$508.74	\$519.32
North America	\$4,995.96	\$5,184.25	\$5,396.65	\$5,603.25	\$5,817.86	\$6,040.80
Total retail sales share (% of worldwide retail sales)						
US*	21.4%	20.9%	20.5%	20.1%	19.8%	19.5%
Canada	2.2%	2.1%	2.0%	2.0%	1.9%	1.8%
North America	23.6%	23.0%	22.6%	22.1%	21.7%	21.3%

Note: excludes travel and event tickets; numbers may not add up to total due to rounding; *forecast from Sep 2014

Source: eMarketer, Dec 2014

183086

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Retail Ecommerce Sales in North America, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Retail ecommerce sales (billions)						
US*	\$264.28	\$305.65	\$349.06	\$394.43	\$442.55	\$493.89
Canada	\$20.98	\$24.63	\$28.77	\$33.05	\$37.61	\$42.67
North America	\$285.26	\$330.29	\$377.82	\$427.48	\$480.16	\$536.56
Retail ecommerce % of total retail sales						
US*	5.8%	6.5%	7.1%	7.7%	8.3%	8.9%
Canada	4.5%	5.2%	5.9%	6.6%	7.4%	8.2%
North America	5.7%	6.4%	7.0%	7.6%	8.3%	8.9%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets; numbers may not add up to total due to rounding; *forecast from Sep 2014

Source: eMarketer, Dec 2014

183119

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Retail Ecommerce Sales in Canada, 2013-2018

billions of C\$, % of total retail sales and % change

	2013	2014	2015	2016	2017	2018
Retail ecommerce	C\$21.61	C\$25.37	C\$29.63	C\$34.04	C\$38.74	C\$43.95
—% of total retail sales*	4.5%	5.2%	5.9%	6.6%	7.4%	8.2%
—% change	17.7%	17.4%	16.8%	14.9%	13.8%	13.5%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel; *eMarketer benchmarks its Canada total retail sales figures against Statistics Canada data, for which the last full year measured was 2013

Source: eMarketer, July 2014; confirmed and republished, Dec 2014

176166

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Total Retail and Retail Ecommerce Sales in Canada, 2013-2018

billions of C\$ and % change

	2013	2014	2015	2016	2017	2018
Total retail sales	C\$481.78	C\$492.37	C\$502.71	C\$513.27	C\$524.00	C\$534.90
—% change	2.5%	2.2%	2.1%	2.1%	2.1%	2.1%
Retail ecommerce sales*	C\$21.61	C\$25.37	C\$29.63	C\$34.04	C\$38.74	C\$43.95
—% change	17.7%	17.4%	16.8%	14.9%	13.8%	13.5%

Note: eMarketer benchmarks its Canada total retail sales figures against Statistics Canada data, for which the last full year measured was 2013; excludes travel and event tickets; *includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment
Source: eMarketer, Dec 2014

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Digital Buyers in North America, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Digital buyers (millions)						
US*	157.1	164.2	171.2	178.1	184.5	190.3
Canada	15.8	16.9	18.0	18.6	19.2	19.5
North America	172.8	181.1	189.1	196.7	203.8	209.8
Digital buyer penetration (% of internet users)						
US*	73.0%	74.4%	75.6%	77.0%	78.4%	79.6%
Canada	63.1%	66.2%	68.9%	70.1%	71.0%	79.6%
North America	72.0%	73.6%	74.9%	76.3%	77.6%	78.7%

Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases; numbers may not add up to total due to rounding;
*forecast from Sep 2014

Source: eMarketer, Dec 2014

183226 www.eMarketer.com

Digital Shoppers* and Buyers** in Canada, 2013-2018

	2013	2014	2015	2016	2017	2018
Digital shoppers* (millions)	19.5	20.2	20.9	21.5	22.2	22.5
—% change		6.6%	3.6%	3.2%	3.2%	1.5%
—% of internet users		78.0%	79.0%	80.0%	81.0%	82.0%
Digital buyers** (millions)	15.8	16.9	18.0	18.6	19.2	19.5
—% change		9.3%	7.3%	6.1%	3.7%	1.4%
—% of internet users		63.1%	66.2%	68.9%	70.1%	71.0%

Note: ages 14+; *internet users who have browsed, researched or compared products digitally via any device during the calendar year but have not necessarily bought digitally; **internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases
Source: eMarketer, Dec 2014

183218 www.eMarketer.com

WESTERN EUROPE

Total Retail Sales in Western Europe, by Country, 2013-2017

	2013	2014	2015	2016	2017
Total retail sales (billions)					
Germany	\$851.81	\$862.88	\$870.65	\$877.61	\$883.76
France	\$817.52	\$829.78	\$839.74	\$848.14	\$854.92
UK*	\$608.03	\$632.05	\$651.60	\$666.25	\$679.85
Italy	\$496.38	\$479.01	\$469.43	\$463.32	\$461.01
Spain	\$341.63	\$336.84	\$334.15	\$333.15	\$333.48
Sweden	\$239.30	\$246.48	\$253.87	\$262.00	\$269.86
Netherlands	\$184.59	\$185.51	\$187.37	\$189.81	\$192.46
Denmark	\$95.90	\$97.53	\$99.38	\$101.47	\$103.70
Norway	\$92.06	\$93.90	\$96.25	\$98.94	\$101.91
Finland	\$65.22	\$65.55	\$66.08	\$66.74	\$67.51
Other	\$614.77	\$622.94	\$632.42	\$642.44	\$652.95

Western Europe **\$4,407.20** **\$4,452.48** **\$4,500.93** **\$4,549.87** **\$4,604.40**

Total retail sales share (% of worldwide retail sales)

	2013	2014	2015	2016	2017
Germany	4.0%	3.8%	3.6%	3.5%	3.3%
France	3.9%	3.7%	3.5%	3.3%	3.2%
UK*	2.9%	2.8%	2.7%	2.6%	2.5%
Italy	2.3%	2.1%	2.0%	1.8%	1.7%
Spain	1.6%	1.5%	1.4%	1.3%	1.2%
Sweden	1.1%	1.1%	1.1%	1.0%	1.0%
Netherlands	0.9%	0.8%	0.8%	0.7%	0.7%
Denmark	0.5%	0.4%	0.4%	0.4%	0.4%
Norway	0.4%	0.4%	0.4%	0.4%	0.4%
Finland	0.3%	0.3%	0.3%	0.3%	0.3%
Other	2.9%	2.8%	2.6%	2.5%	2.4%

Western Europe **20.8%** **19.8%** **18.8%** **17.9%** **17.2%**

Note: excludes travel and event tickets; numbers may not add up to total due to rounding; *forecast from Sep 2014

Source: eMarketer, Dec 2014

183089 www.eMarketer.com

Retail Ecommerce Sales in Western Europe, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Retail ecommerce sales (billions)						
UK*	\$70.39	\$82.00	\$93.89	\$104.22	\$114.64	\$124.96
Germany	\$51.91	\$63.38	\$73.46	\$82.93	\$91.97	\$99.33
France	\$34.21	\$38.36	\$42.62	\$46.13	\$49.71	\$53.26
Spain	\$12.47	\$13.96	\$15.90	\$17.93	\$19.97	\$21.74
Norway	\$8.07	\$9.13	\$10.30	\$11.34	\$12.37	\$13.33
Sweden	\$7.57	\$8.69	\$9.71	\$10.72	\$11.77	\$12.75
Denmark	\$7.41	\$8.40	\$9.27	\$10.01	\$10.75	\$11.44
Italy	\$7.51	\$8.23	\$8.91	\$9.53	\$10.08	\$10.48
Netherlands	\$7.09	\$7.92	\$8.70	\$9.31	\$9.85	\$10.34
Finland	\$5.99	\$6.45	\$6.86	\$7.24	\$7.56	\$7.84
Other	\$31.49	\$36.19	\$41.41	\$46.23	\$51.50	\$56.55
Western Europe	\$244.11	\$282.70	\$321.04	\$355.59	\$390.17	\$422.01
Retail ecommerce % of total retail sales						
UK*	11.6%	13.0%	14.4%	15.6%	16.9%	18.0%
Finland	9.2%	9.8%	10.4%	10.8%	11.2%	11.5%
Norway	8.8%	9.7%	10.7%	11.5%	12.1%	12.7%
Denmark	7.7%	8.6%	9.3%	9.9%	10.4%	10.8%
Germany	6.1%	7.3%	8.4%	9.4%	10.4%	11.2%
France	4.2%	4.6%	5.1%	5.4%	5.8%	6.2%
Netherlands	3.8%	4.3%	4.6%	4.9%	5.1%	5.3%
Spain	3.6%	4.1%	4.8%	5.4%	6.0%	6.5%
Sweden	3.2%	3.5%	3.8%	4.1%	4.4%	4.6%
Italy	1.5%	1.7%	1.9%	2.1%	2.2%	2.3%
Other	5.1%	5.8%	6.5%	7.2%	7.9%	8.6%
Western Europe	5.5%	6.3%	7.1%	7.8%	8.5%	9.1%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets; numbers may not add up to total due to rounding;

*forecast from Sep 2014

Source: eMarketer, Dec 2014

183120

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Digital Buyers in Western Europe, by Country, 2013-2018

	2013	2014	2015	2016	2017	2018
Digital buyers (millions)						
Germany	43.3	45.6	47.1	47.9	48.5	49.1
UK*	38.3	39.5	40.4	41.4	42.1	42.6
France	28.1	30.5	31.3	32.1	32.7	33.3
Spain	15.4	16.8	18.1	19.1	20.0	20.8
Italy	13.9	15.1	16.2	17.4	18.3	19.0
Netherlands	9.2	9.6	9.9	10.2	10.3	10.4
Sweden	5.3	5.4	5.5	5.6	5.7	5.8
Denmark	3.3	3.3	3.4	3.5	3.6	3.6
Finland	2.6	2.7	2.8	3.0	3.1	3.2
Norway	2.4	2.5	2.6	2.7	2.8	2.9
Other	21.2	22.6	23.6	24.4	25.2	26.0
Western Europe	183.0	193.7	201.1	207.3	212.2	216.6
Digital buyer penetration (% of internet users)						
UK*	87.2%	88.0%	88.2%	88.9%	89.0%	89.0%
Denmark	80.7%	80.8%	81.3%	82.0%	83.6%	84.5%
Germany	79.1%	80.1%	81.8%	82.6%	83.4%	84.2%
Netherlands	74.6%	77.0%	78.0%	79.3%	79.8%	80.2%
Sweden	76.3%	76.8%	77.8%	78.7%	79.6%	79.7%
Norway	73.6%	75.5%	77.7%	80.2%	83.0%	84.7%
France	66.5%	70.7%	71.3%	71.8%	72.0%	72.5%
Finland	68.4%	70.3%	72.5%	74.9%	77.0%	79.0%
Spain	54.5%	57.0%	60.0%	62.0%	64.0%	65.8%
Italy	44.1%	46.3%	48.7%	51.0%	53.0%	54.7%
Other	63.5%	65.5%	66.9%	68.0%	68.9%	70.3%
Western Europe	64.1%	66.0%	67.4%	68.5%	69.4%	70.3%

Note: ages 14+; internet users who have made at least one purchase via any digital channel during the calendar year, including online, mobile and tablet purchases; numbers may not add up to total due to rounding;

*forecast from Sep 2014

Source: eMarketer, Dec 2014

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