

# GERMANY IS THE LARGEST ECOMMERCE MARKET IN CENTRAL EUROPE, WITH A POPULATION OF 70.5 MILLION INTERNET USERS.<sup>1\*</sup>

\* AT THE CURRENT RATE OF NEW TECHNOLOGY ADOPTION AND EXPLOSIVE GROWTH IN ONLINE PURCHASING BY CONSUMERS, BY 2023 EVERY FOURTH EURO WILL BE SPENT ONLINE — AN EXPANSION OF ALMOST 250 PERCENT<sup>2</sup>

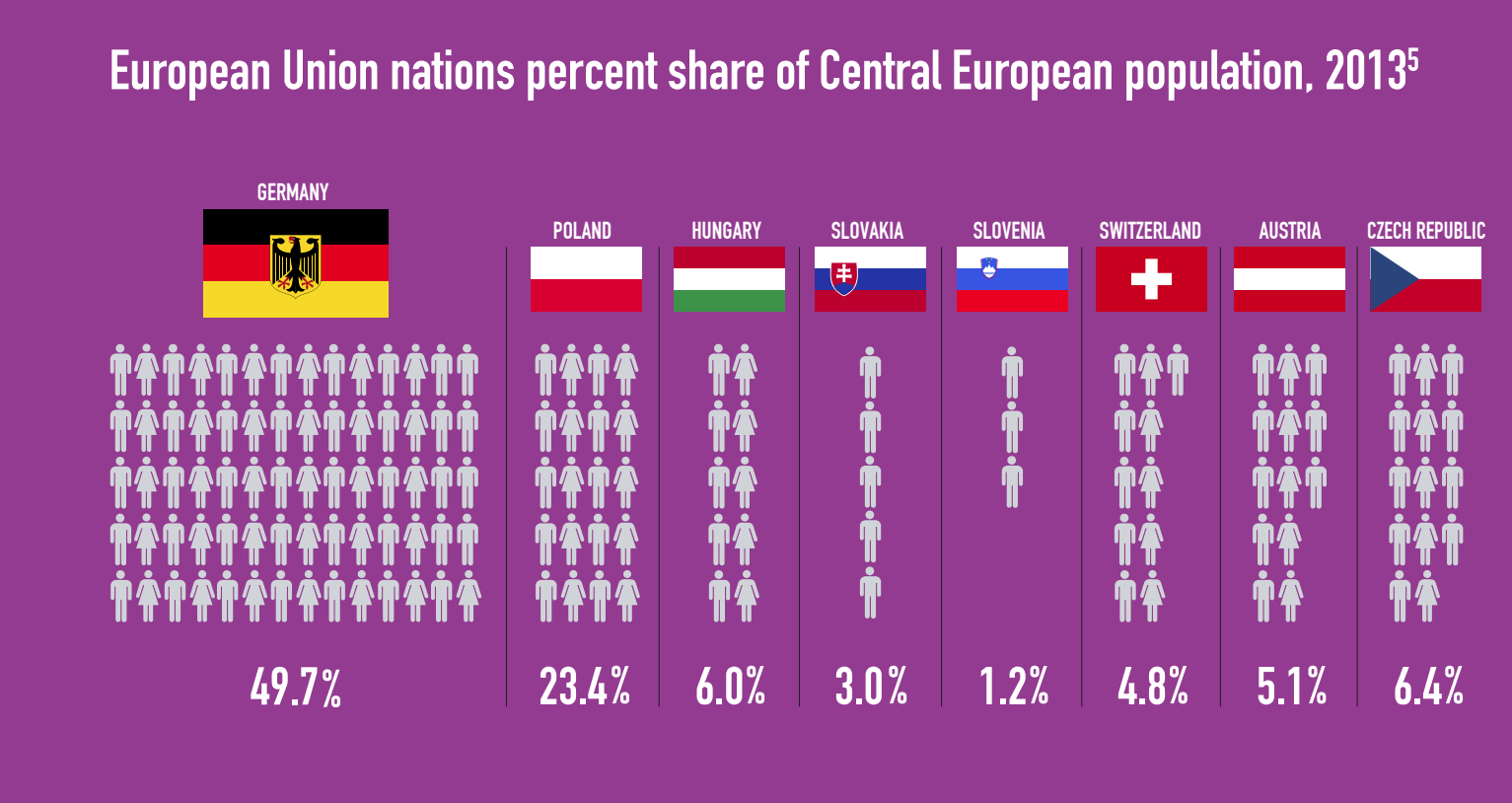
## GERMAN ECONOMY

† PROJECTED

### MARKET SIZE // Current and Projected Growth

42 MILLION GERMAN CONSUMERS, OR 52% OF THE TOTAL POPULATION, PURCHASED GOODS OR SERVICES ONLINE IN 2013.<sup>3</sup>

Annual and projected ecommerce growth from 2012–2017<sup>4</sup>



<sup>1</sup> [http://www.gtai.de/GTAI/Content/EN/Invest/\\_SharedDocs/Downloads/GTAI/Fact-sheets/Business-services-ict/fact-sheet-e-commerce-en.pdf](http://www.gtai.de/GTAI/Content/EN/Invest/_SharedDocs/Downloads/GTAI/Fact-sheets/Business-services-ict/fact-sheet-e-commerce-en.pdf)  
<sup>2</sup> <http://nextcase.com/2014/01/20/e-commerce-sales-growth-in-germany/>

## GERMAN ECONOMY

### MARKET SIZE // Central Europe

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

European Union nations percent share of Central European population, 2013<sup>5</sup>



<sup>5</sup> <http://www.ecommerce-europe.eu/website/facts-figures/light-version/download120>

## MARKET SIZE

### ECOMMERCE REVENUE

GERMAN ECOMMERCE TURNOVER GREW MORE THAN 40% FROM 2012 TO 2013, AND IS EXPECTED TO GROW AN ADDITIONAL 25% IN 2014.<sup>6</sup>



B2C ECOMMERCE SALES IN GERMANY FOR 2012–2013 (2014–2017 FORECAST)<sup>7</sup>



\* Values in billions USD

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

## COMMERCE EXPERIENCE

### MOBILE SHOPPING

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



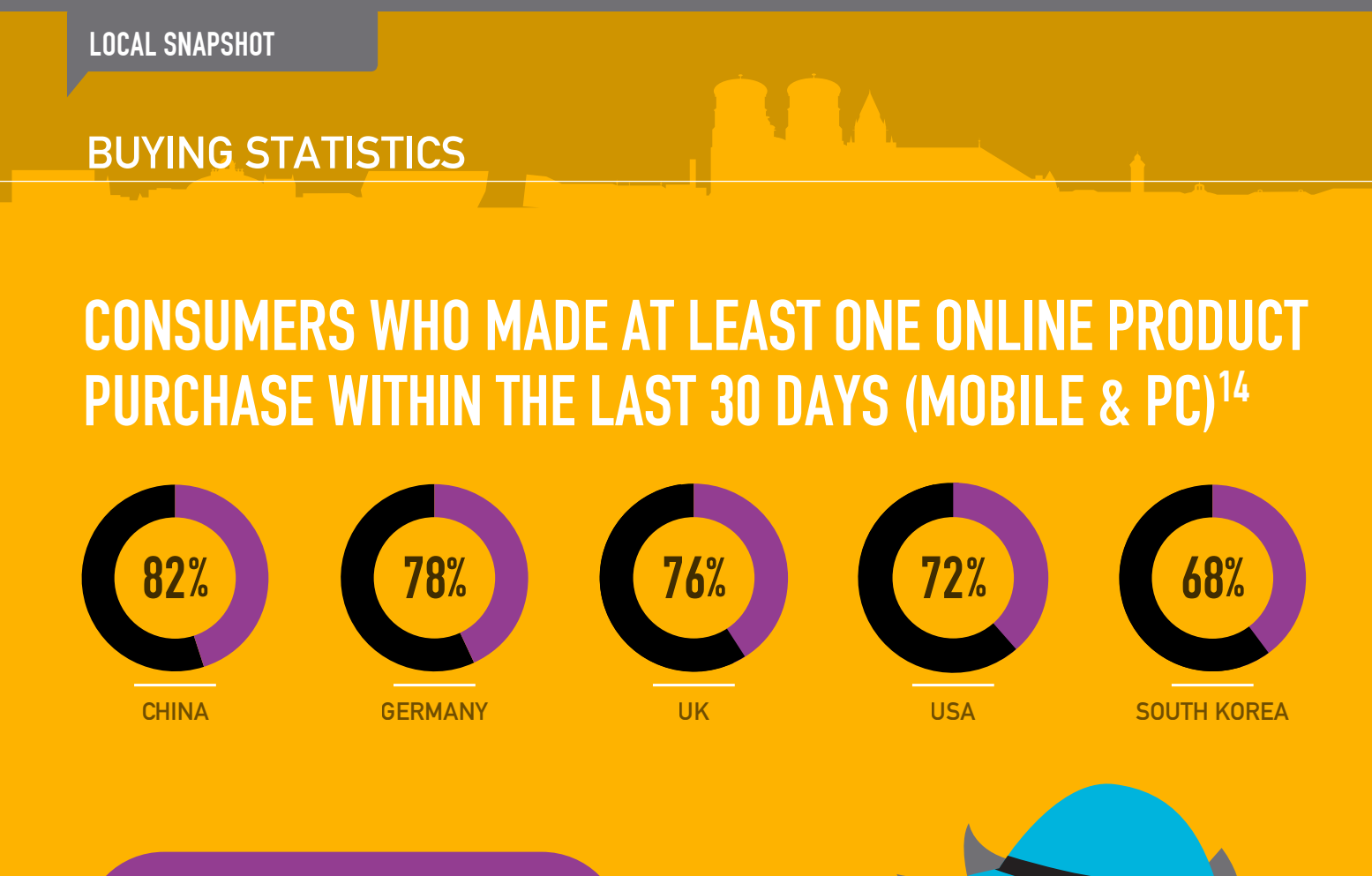
Providing users the benefit of anytime-consumer interaction, 30 million smartphone and 115 million mobile subscriptions are expected to be purchased in 2014, creating turnover of EUR 9.3 billion (up 10 percent compared to 2013).<sup>9</sup>

<sup>8</sup> <http://www.ecommerce-europe.eu/website/facts-figures/light-version/download120>  
<sup>9</sup> The Paypers, Country Report Germany 2013

## PRODUCT CATEGORIES

### BY ONLINE RETAIL SALES

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



<sup>10</sup> AT Kearney, November 2013

## GERMAN CULTURE

### CONSIDERATIONS

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

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



<sup>11</sup> [http://www.consumerscore.com/insights/online\\_shopping/German-Consumers-Want-Choices-And-Convenience-When-Shopping-Online](http://www.consumerscore.com/insights/online_shopping/German-Consumers-Want-Choices-And-Convenience-When-Shopping-Online)  
<sup>12</sup> [www.internetretailer.com/commentary/2014/05/05/e-commerce-opportunities-europes-strongest-economy](http://www.internetretailer.com/commentary/2014/05/05/e-commerce-opportunities-europes-strongest-economy)

## GERMAN CULTURE

### BUYING BEHAVIOR OR CONSIDERATIONS

GERMAN CONSUMERS TURN TO A VARIETY OF SOURCES WHEN MAKING PURCHASING DECISIONS.<sup>13</sup>



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

## LOCAL SNAPSHOT

### BUYING STATISTICS

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



51.6 MILLION GERMAN INTERNET USERS HAVE MADE AT LEAST ONE ONLINE PURCHASE<sup>15</sup>

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

<sup>14</sup> GlobalWebIndex, February 2014  
<sup>15</sup> The Paypers Country Report Germany 2013

## COMMERCE EXPERIENCE

### FACT // World Cup 2014

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



LOSSES HAVE THE OPPOSITE EFFECT. AFTER HOST NATION BRAZIL WAS KNOCKED-OUT OF THE TOURNAMENT, ONLINE TRANSACTIONS DROPPED 17%.<sup>17</sup>

FACT: The German national soccer team won the FIFA World Cup in 1954, 1974, 1990 and 2014.<sup>18</sup>

<sup>17</sup> <http://mobilemarketingmagazine.com/infographic-world-cup-affected-e-commerce-sales>  
<sup>18</sup> [www.fifa.com/associations/association=ger](http://www.fifa.com/associations/association=ger)

## SHOPPING BEHAVIOR

### PAYMENTS

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



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

<sup>19</sup> [www.internetretailer.com/commentary/2014/05/05/e-commerce-opportunities-europes-strongest-economy](http://www.internetretailer.com/commentary/2014/05/05/e-commerce-opportunities-europes-strongest-economy)  
<sup>20</sup> [http://www.gtai.de/GTAI/Content/EN/Invest/\\_SharedDocs/Downloads/GTAI/Fact-sheets/Business-services-ict/fact-sheet-e-commerce-en.pdf](http://www.gtai.de/GTAI/Content/EN/Invest/_SharedDocs/Downloads/GTAI/Fact-sheets/Business-services-ict/fact-sheet-e-commerce-en.pdf)