

PayPal ואיגוד האינטרנט הישראלי מציגים:

מסחר מקוון בישראל - תמונת מצב 2014

תוצאות סקר בנושא מסחר אינטרנטי בינלאומי - IPSOS MORI

אפי דהן – מנהל אזור ישראל ואפריקה, PayPal



Research Methodology

This study was conducted across 22 markets and approx. 17,600 consumers globally.

Fieldwork



Online survey

Global Fieldwork conducted Sept-Oct 2014
Israel fieldwork 30th Sept – 20th Oct 2014



20 minute questionnaire

This research was carried out to the international quality standard for market research, ISO 20252:2012

Sample, per market

22 markets
Sample of 800 per market.

Nationally representative of online population Aged 18+

Respondents recruited from online panels

Own and/or use an Internet-enabled device*



Data weighted to adjust for known population incidence

Questionnaire

Screening



Transaction & Spend:
Past 12 Months &
Next 12 Months



E-commerce
Behaviour and
Attitudes



Cross-Border
Commerce



Mobile
Commerce



GLOBAL SNAPSHOT

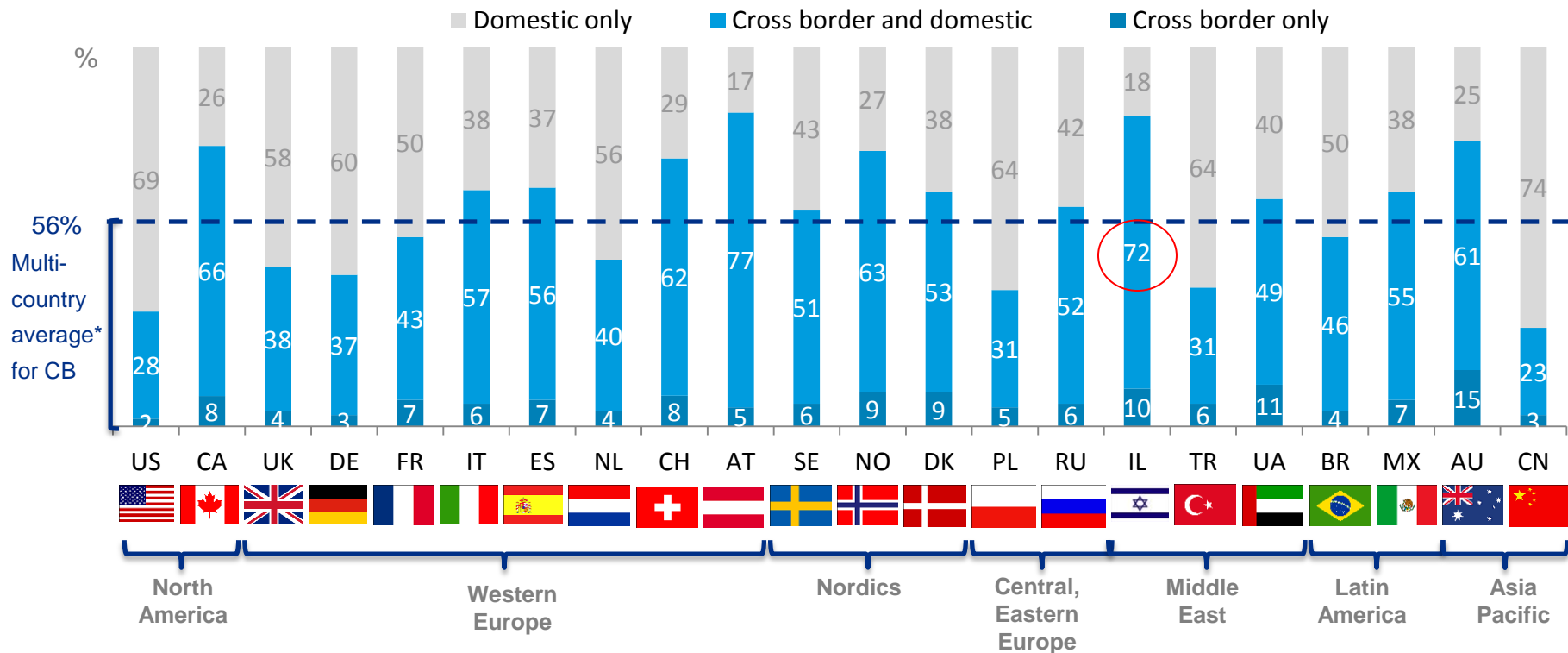
*UK, France, Germany, Austria, Switzerland, Italy, Spain, Netherlands,
Sweden, Norway, Denmark, Poland, Turkey, Russia, **Israel**, UAE, USA,
Canada, Brazil, Mexico, China, Australia*

**What do Austria, Israel and
Australia have in common?**

**All three are record holders in
cross boarder online shopping !**

Cross border commerce is a driving force in today's global marketplace

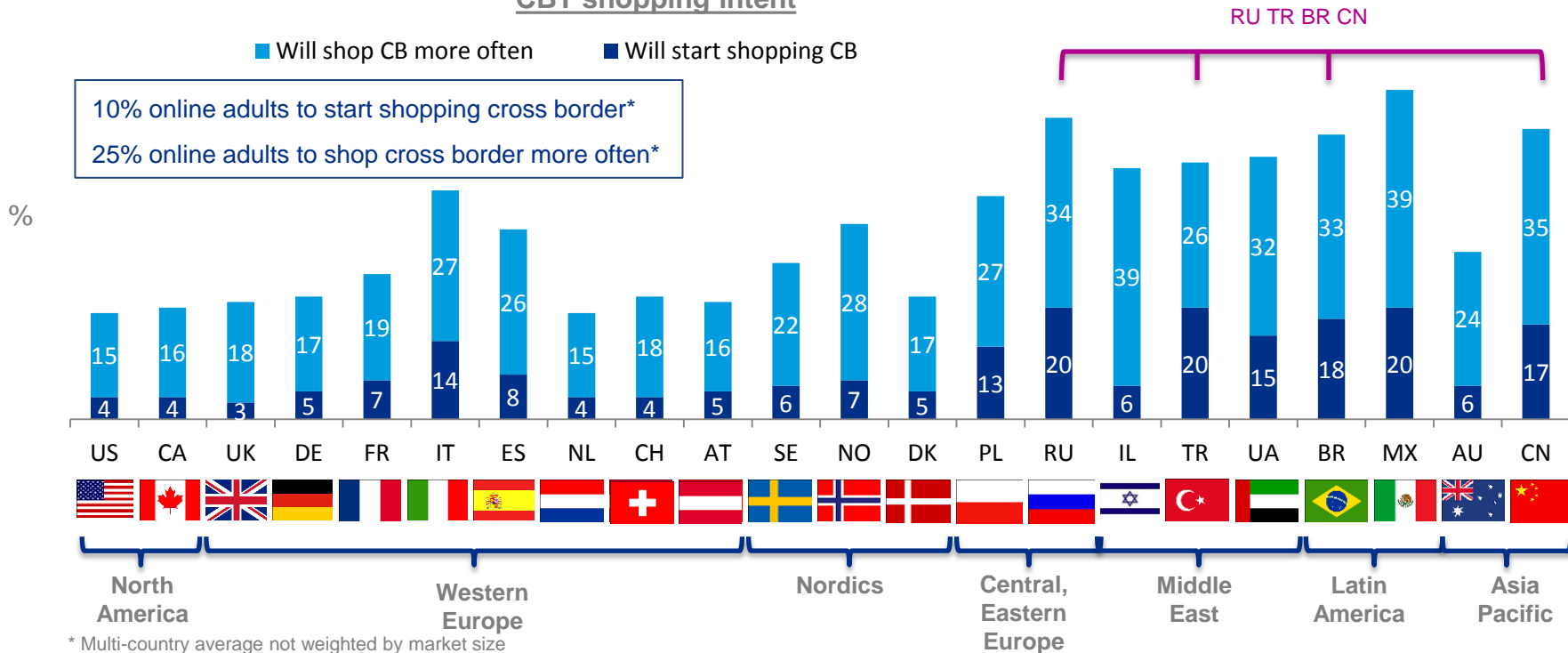
Self-stated domestic and cross border purchasing in past 12 months



Expect continued cross border growth and penetration, especially from 'emerging' markets

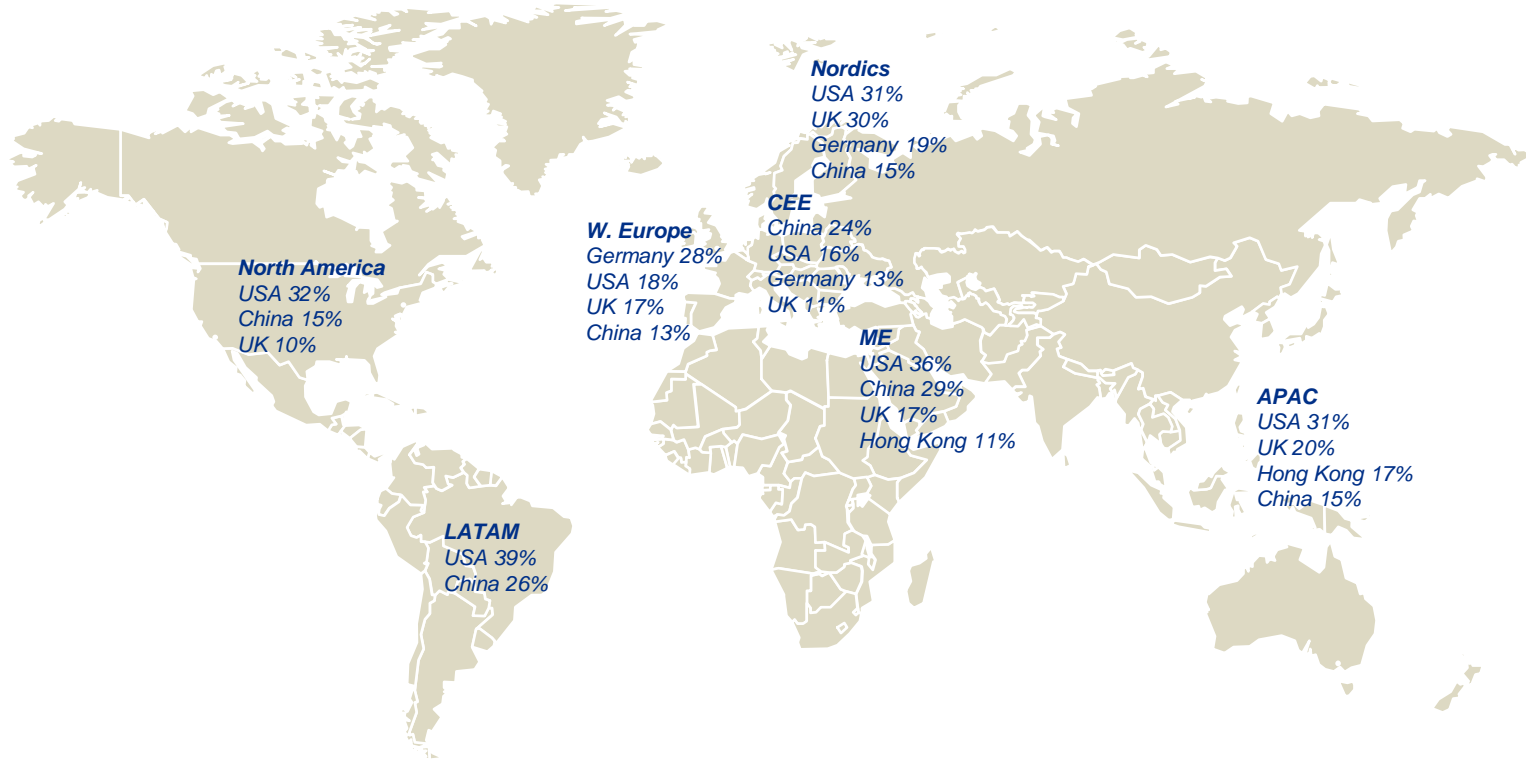
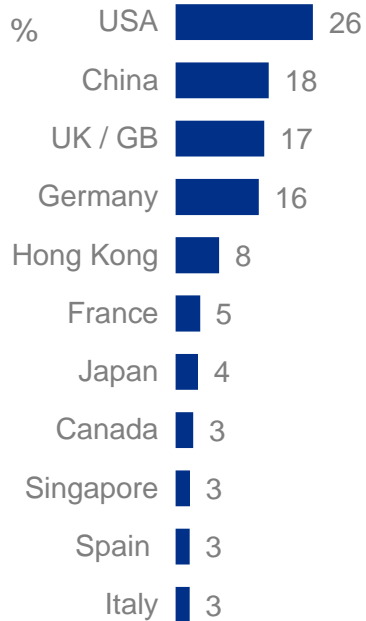
Consumers are generally positive about shopping cross border more often

CBT shopping intent

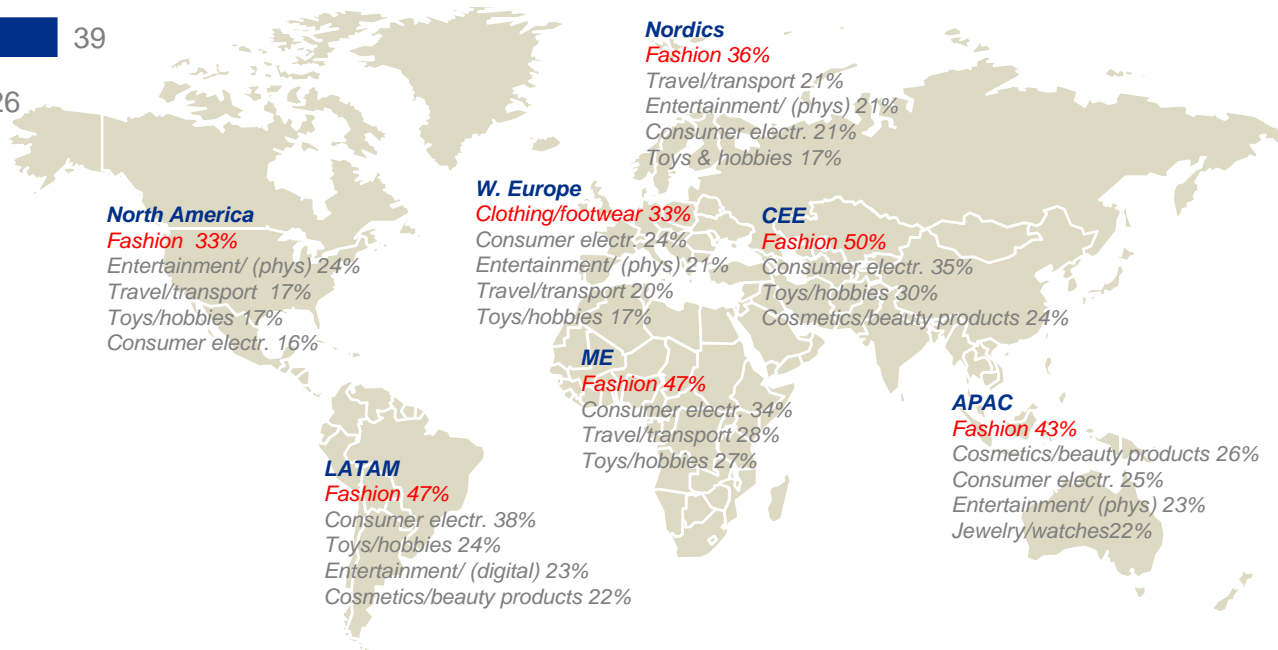
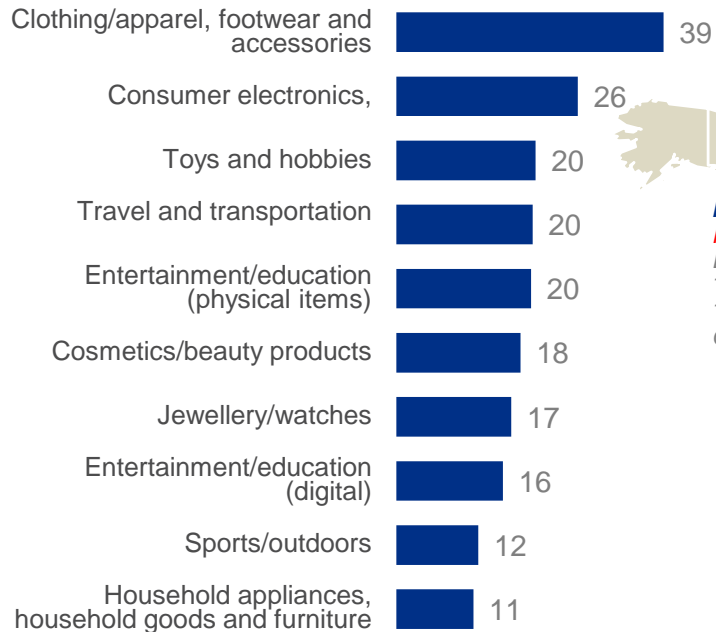


* Multi-country average not weighted by market size

US, China and Western Europe are most popular cross border destinations



Fashion & consumer electronics are top cross border categories purchased



Main Findings



CB driving force in the global marketplace



CB shoppers are valuable consumers: 2X online spend



W. Europe ,N. America & APAC - 3 key CB destinations



Fashion & electronics - the most sought after CB categories



Growth expected - Emerging markets

ISRAEL FINDINGS



Domestic and Cross-Border Online Shopping Behaviour

72% Shopped Online in Past 12 Months

Base: Internet users n= 800

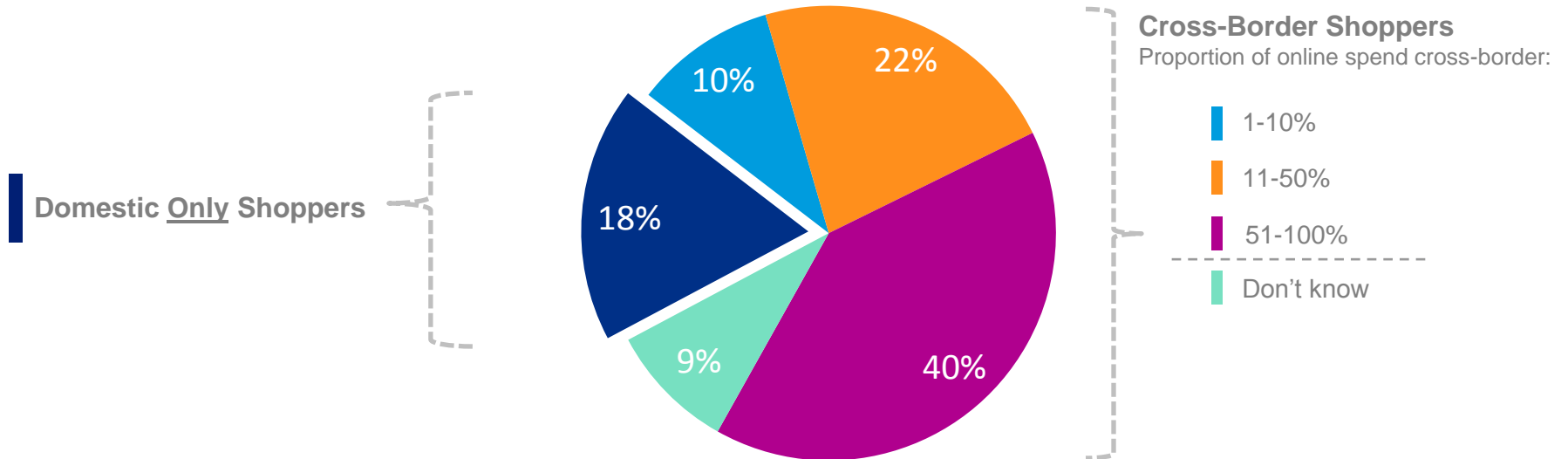
Among online shoppers:

18% only shop domestically

72% shop both domestically and cross-border

10% only shop cross-border

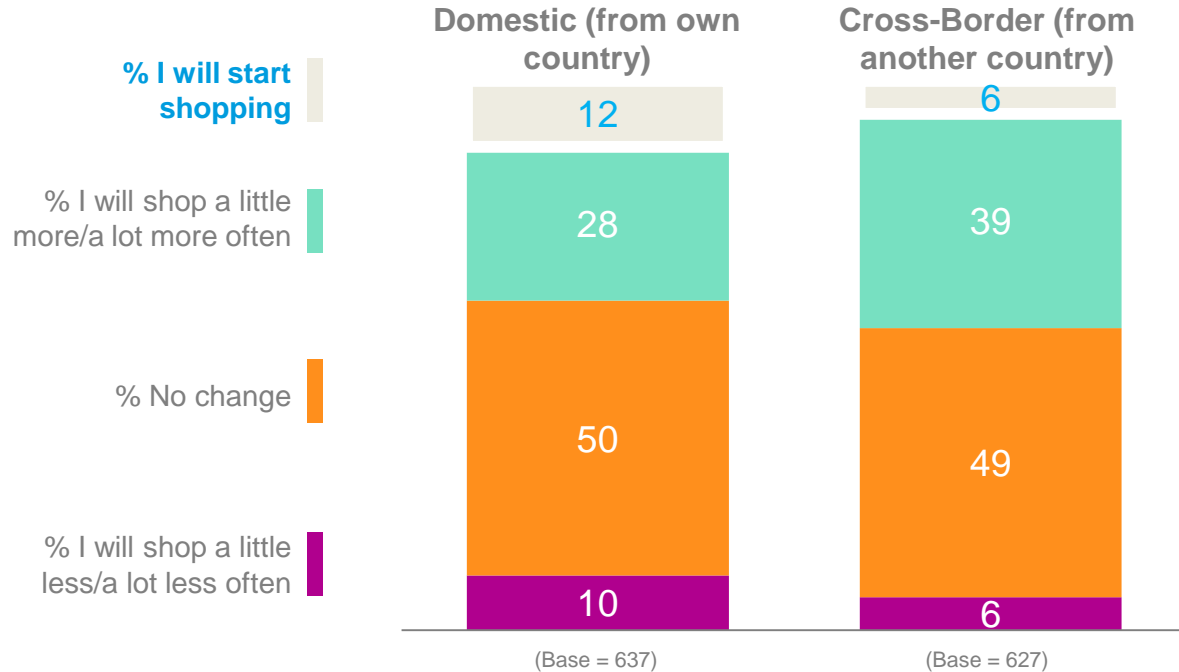
Mix of Domestic and Cross-Border Shoppers



Q27. Thinking about shopping online, from which of the following country or geographies' websites have you purchased in the past 12 months? Please include your home country if applicable. Base: Online shoppers n=575

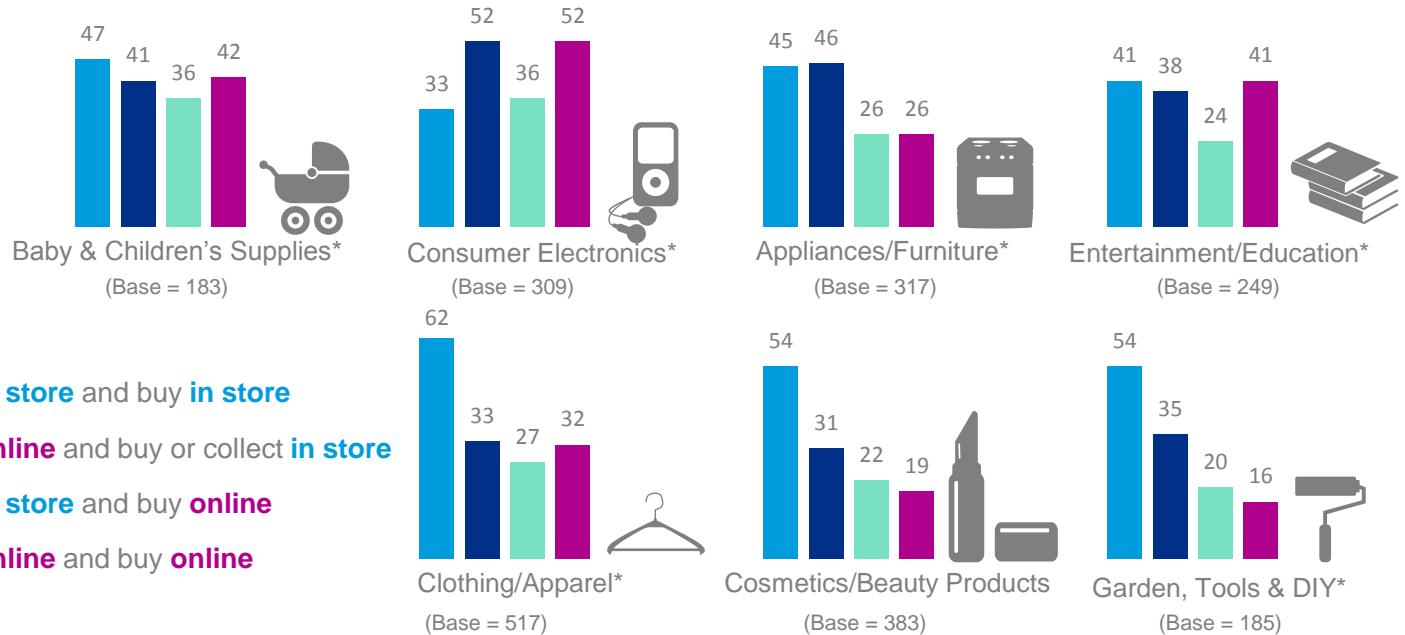
Q36d What percentage of your online spending do you think is on websites from another country? Please provide a best guess if not sure. Base: Online shoppers n=575

Domestic and Cross Border Online Shopping Intentions



Shopping Strategies by Category

Different purchasing strategies are used in different categories



- % Research/choose **in store** and buy **in store**
- % Research/choose **online** and buy or collect **in store**
- % Research/choose **in store** and buy **online**
- % Research/choose **online** and buy **online**

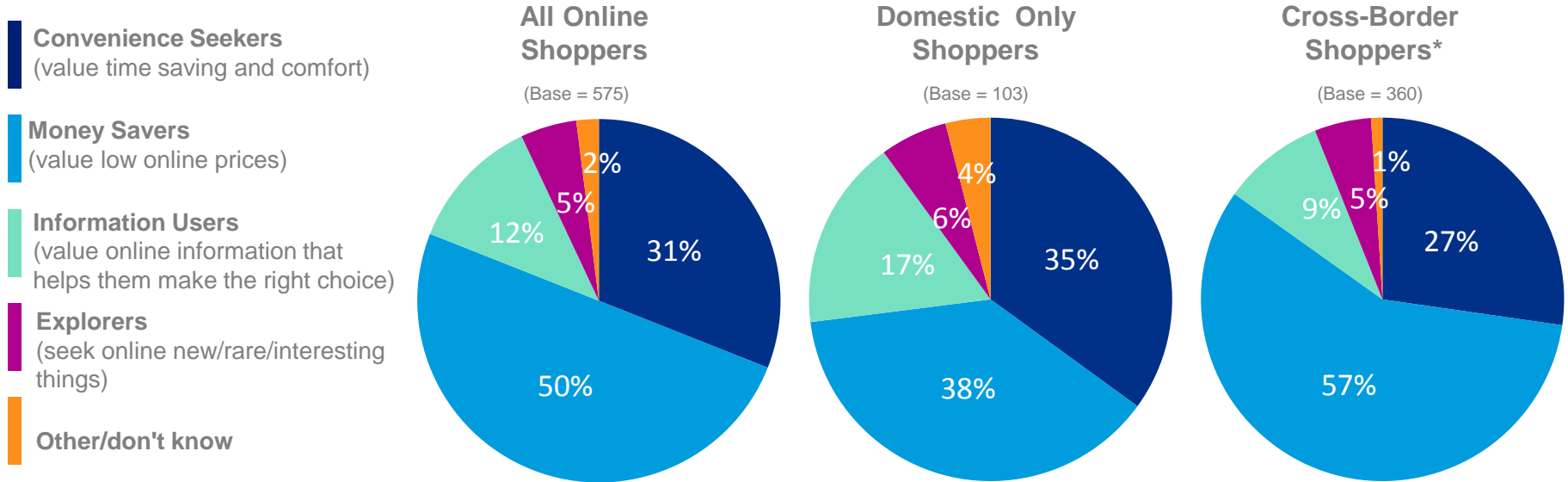
Q17. Please indicate how you would usually consider researching and purchasing these items.

Base: Internet users purchasing online or offline in each category

* Full category descriptions: Baby/children's supplies, equipment and accessories (excluding clothes/footwear); Consumer electronics, computers/tablets/mobiles & peripherals; Household appliances, household goods and furniture; Entertainment/education (physical items) – e.g. Books, music CDs, DVDs, console video games, software CDs etc.; Clothing/apparel, footwear and accessories; Garden, tools, and home improvement

The Online Shopper of Today

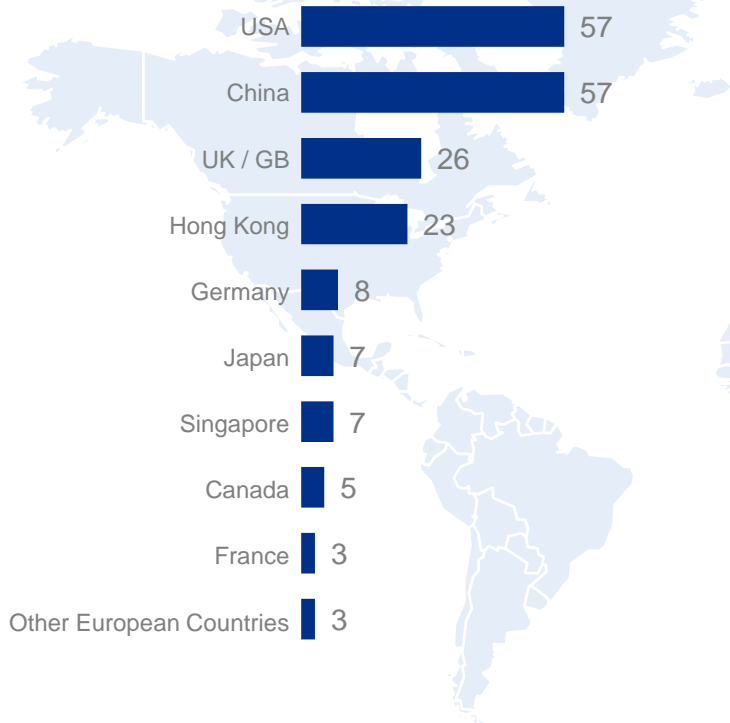
Consumers' online choices are driven by different motivations



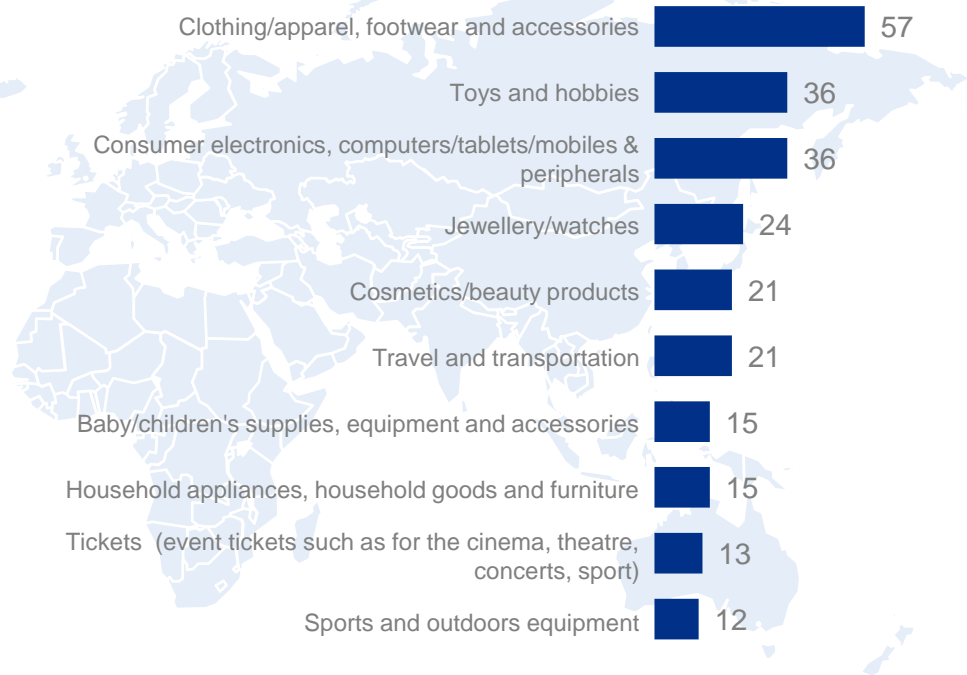
What and Where?

Cross-Border Commerce

Top 10 Countries/Regions



Top 10 Categories



Share of Spend Cross-border Websites



Drives and barriers for online shopping by Israeli consumers

Free shipping and security can drive cross-border trade...Cost and quality concerns are deterrents

Top potential drivers



67%
Free shipping



59%
Safe way to pay



56%
Lower overall cost



53%
Items that are hard-to-find locally

Top barriers



63%
Concern that item might not match original description



56%
Customs/duties/fees/taxes



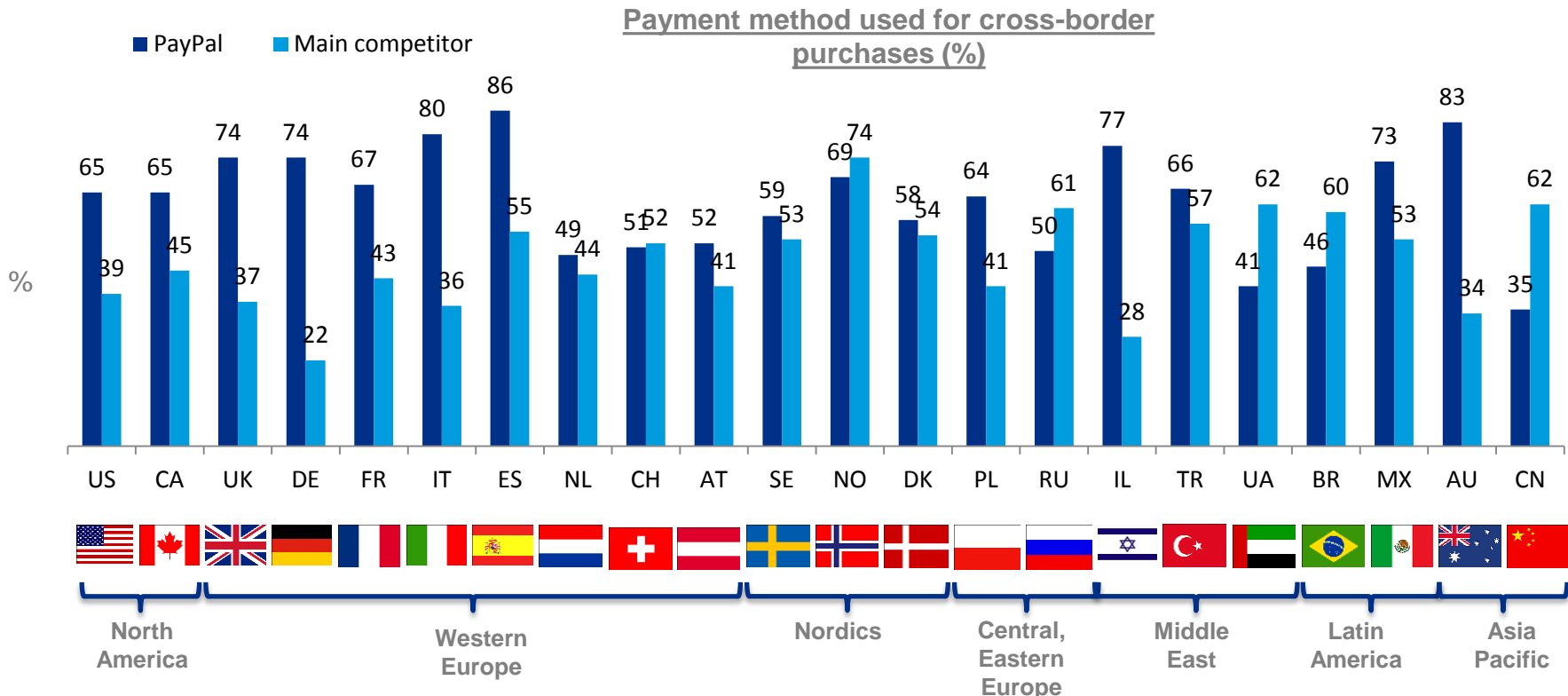
52%
Delivery shipping costs



50%
Concern that item may not be received

PayPal usage for CB ahead of competition in majority of markets

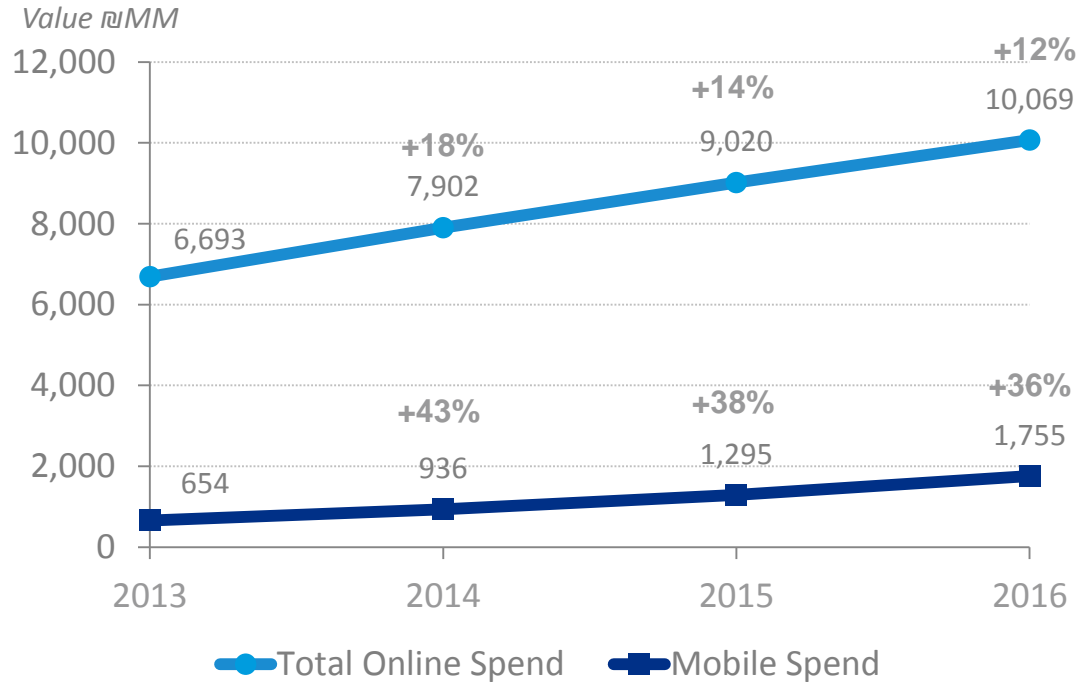
PayPal usage correlates with markets where eBay provides a good foundation.



Estimated & Forecasted Online commerce

Estimated Online & Mobile Commerce 2013-2016

- Our projection is a growth in both total and mobile online spend with diminishing growth rates



Key Takeaways:

Ipsos research 2014



CB driving force in the global marketplace



The most popular category is Fashion!



CB shoppers are valuable consumers: 2X online spend



Israel: 72% Shopped Online & 82% shopped CB in the past year



Israel: Free shipping and security can drive cross-border trade

Thank You