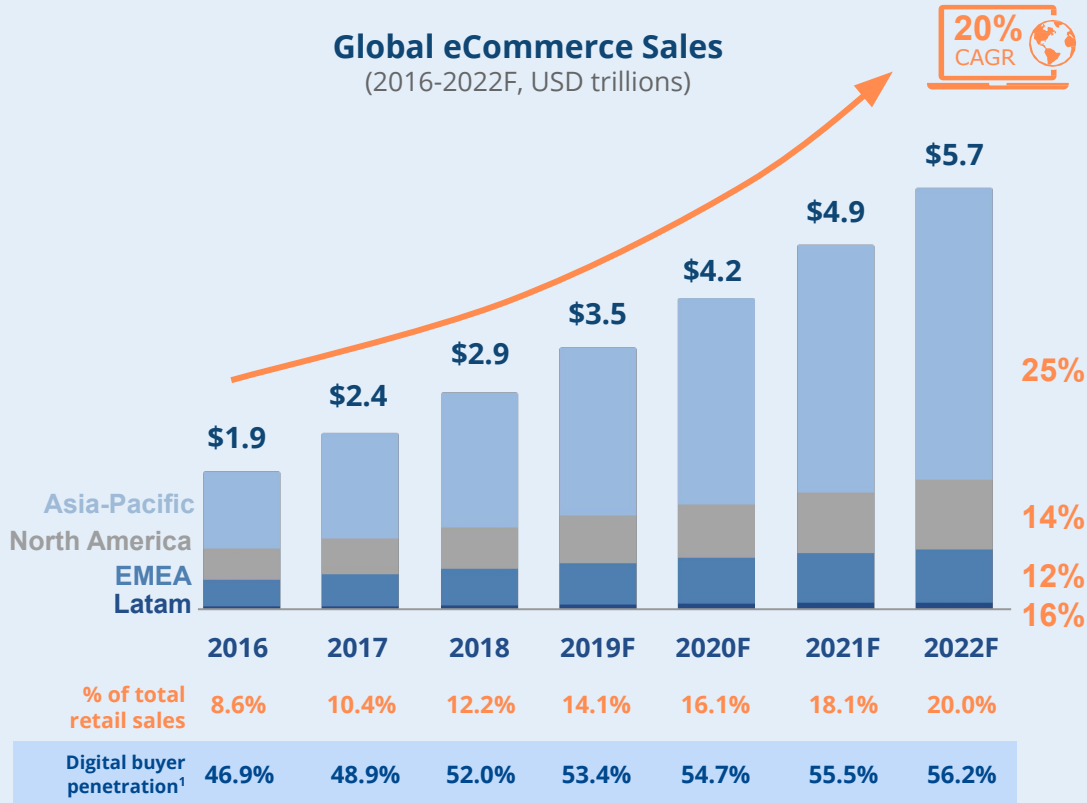


eCommerce 2020

*15 insights to know for your next retail
adventure in a connected world*

1. eC Will Attain 20% of Global Retail Sales and 56% Digital-Buyer Penetration by 2022

Global eCommerce Sales
(2016-2022F, USD trillions)



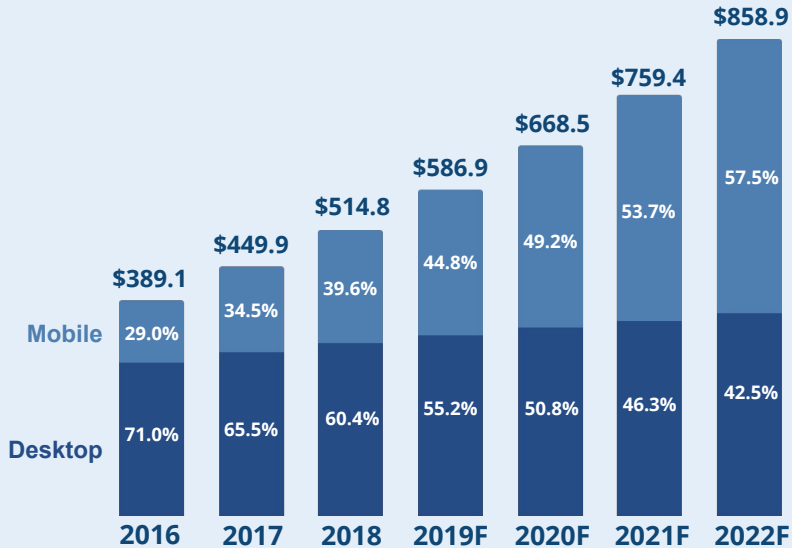
Digital Buyer Penetration by Region
(2019F)

Region	Digital Buyers (M) ²	Digital Buyer Penetration ¹
Asia-Pacific	1,157	69.1%
Western Europe	232	75.6%
North America	217	79.9%
Latin America	172	54.1%
Central and Eastern Europe	127	49.7%
Middle East and Africa	135	37.6%
Worldwide	2,041	53.4%

2. Mobile Devices Will Represent 72% of Digital Commerce by 2022

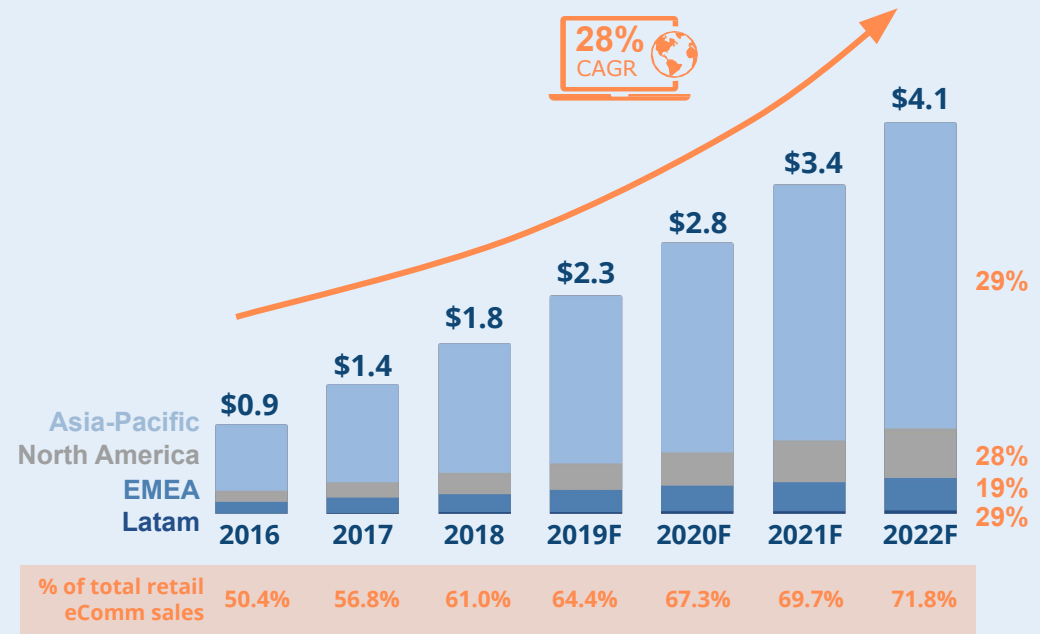
US Mobile and Desktop eCommerce Sales

(2016-2022F, USD billions)



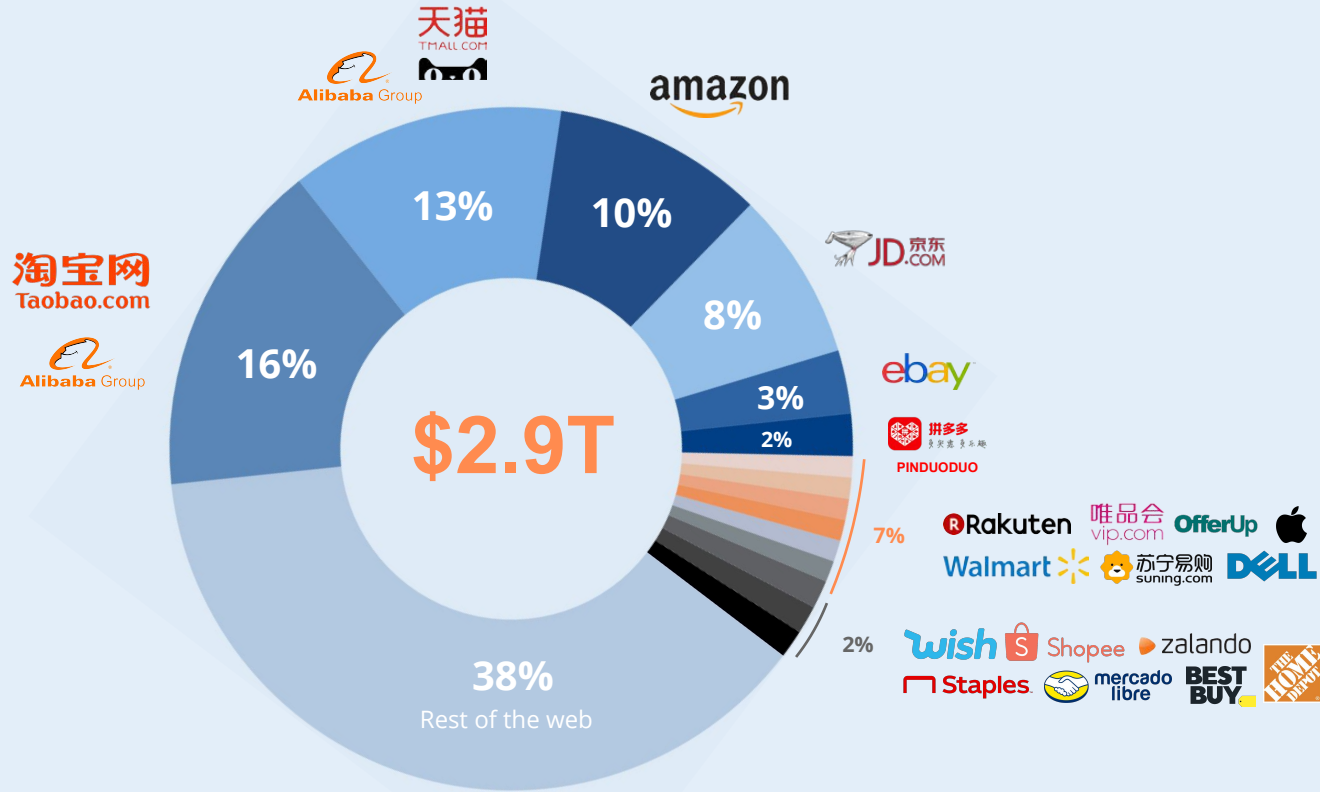
Global Mobile Commerce Sales

(2016-2022F, USD trillions)



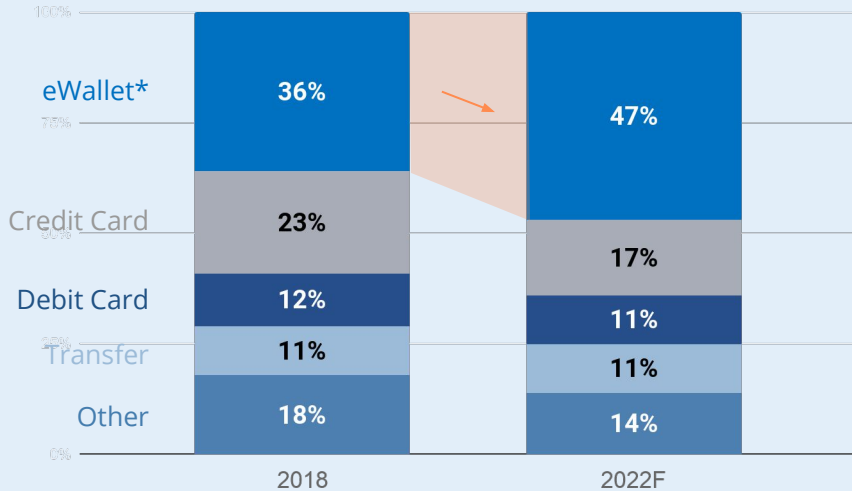
3. Top 20 Commerce Players represent 70% of Global eCommerce

Global eCommerce Gross Merchandise Sales Volume¹
(Global, 2018)



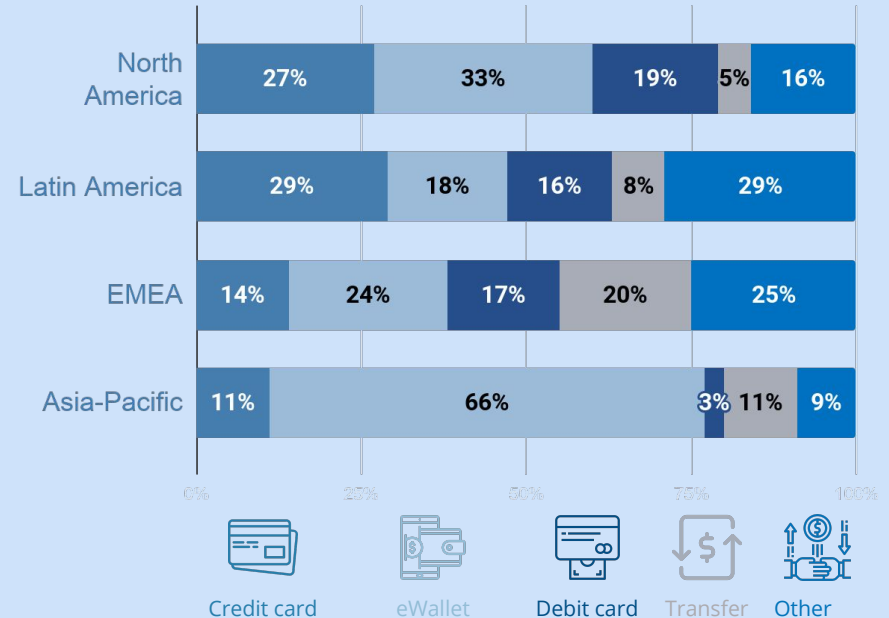
4. eWallets Will Represent Half of All eC Transactions by 2022

Global eCommerce Sales Share by Payment Method
(2018 and 2022, % of total)



*An eWallet, sometimes called a digital wallet, is a secure online space that contains one or more currency purses.

Regional eCommerce Sales Share by Payment Method
(2020, % of total)



Credit card



eWallet



Debit card

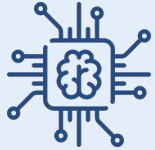


Transfer



Other

5. Brands Are Implementing New Technology to Enhance Customer Experiences



Increasingly spending on
Artificial Intelligence

\$3.4 Billion

Retail spend in cognitive/AI
in 2019



Click-and-collect
is growing

\$6.6 Billion

Expected value of
click-and-collect
market in 2020



Personalization
will be a key
differentiator

64%

of customers say they'd prefer
to get a personalized shopping
experience based on their
previous purchase behavior



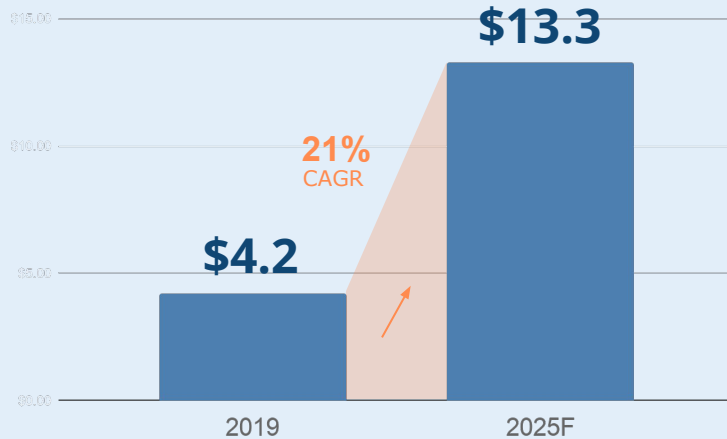
Data & Analytics
continues to a
challenge for Retailers

60%

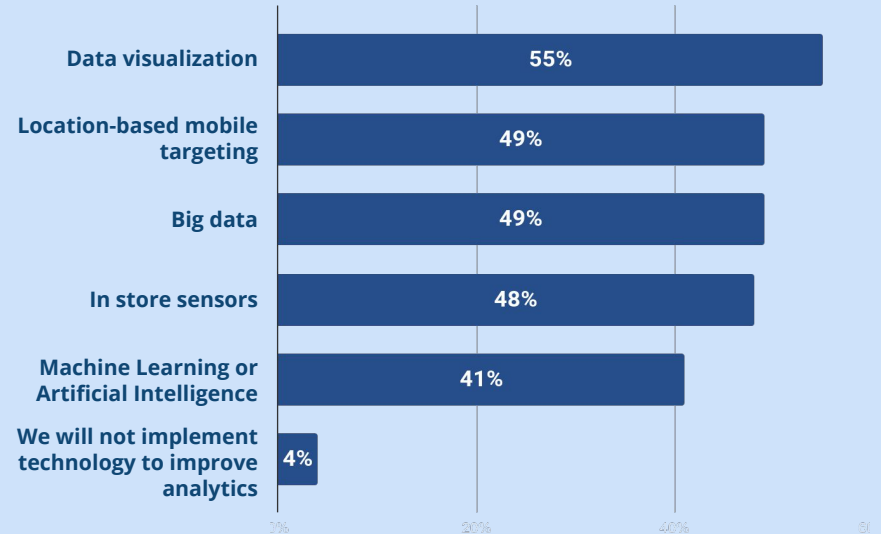
of US retailers say they don't
have reliable-enough data for
executing effective customer
acquisition initiatives

6. Retailers Are Embracing Analytics and Data as a Source for Survival

Big-data Analytics in Retail: Market Size
(2019-2025F, USD trillions)



What technologies is your company implementing or considering to improve analytics?

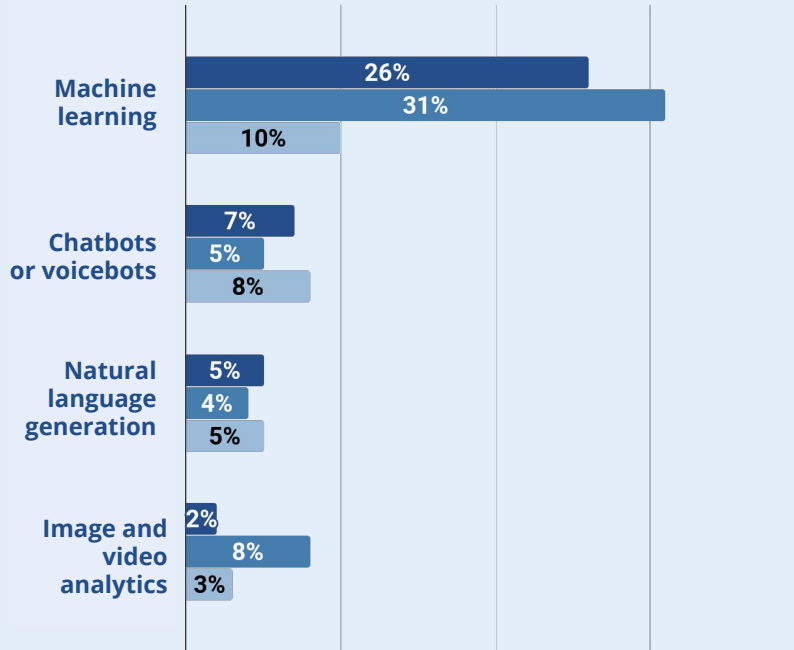


7. Rapidly Expanding: Artificial Intelligence and Augmented Reality Implementations for Retail

Artificial Intelligence Case Distribution in Retail Organizations Worldwide, 2018

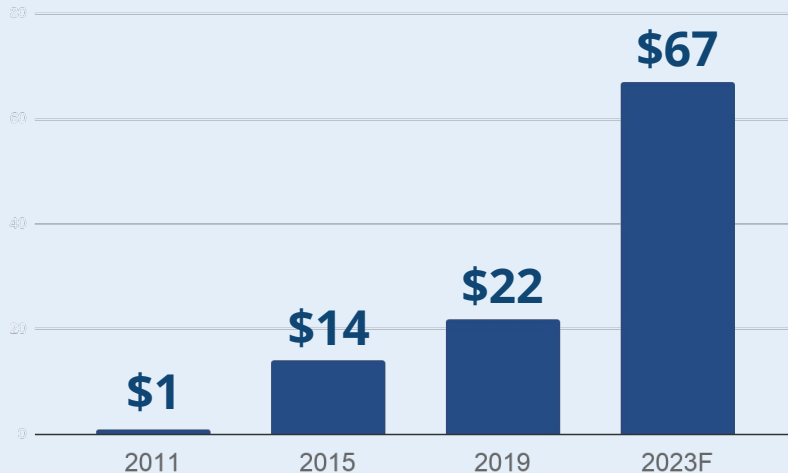
by Operating Model

■ Startup ■ In-house ■ Major Technology Firm

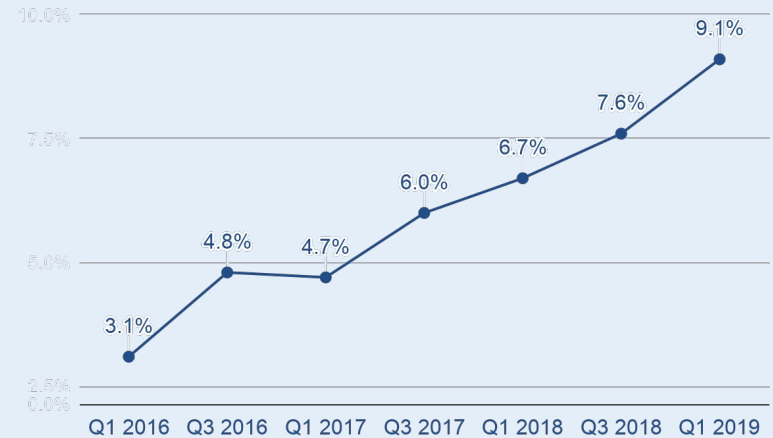


8. Social Commerce Will Expand as Platforms Improve the Shoppable Experience

US Social Commerce Revenues
(2011-2023F USD billions)

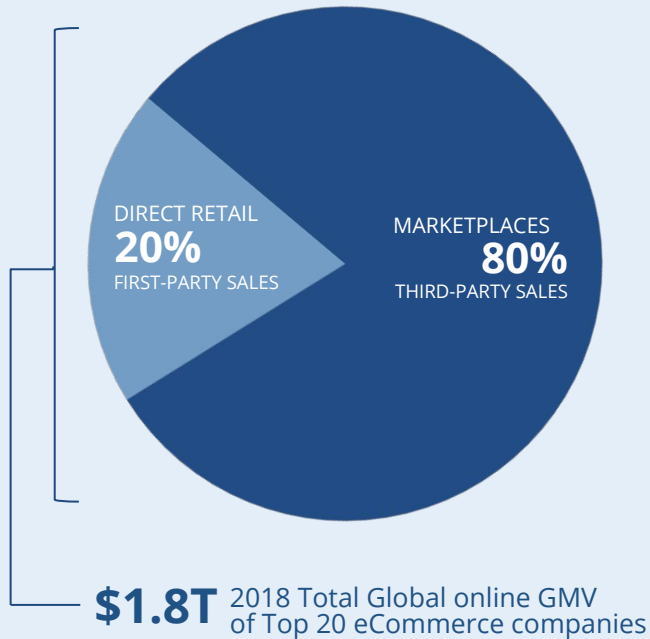


Share of Total Referral Traffic to eCommerce Sites from Social Media Platforms
U.S., Q1 2016-Q1 2019; % Total Referral Traffic

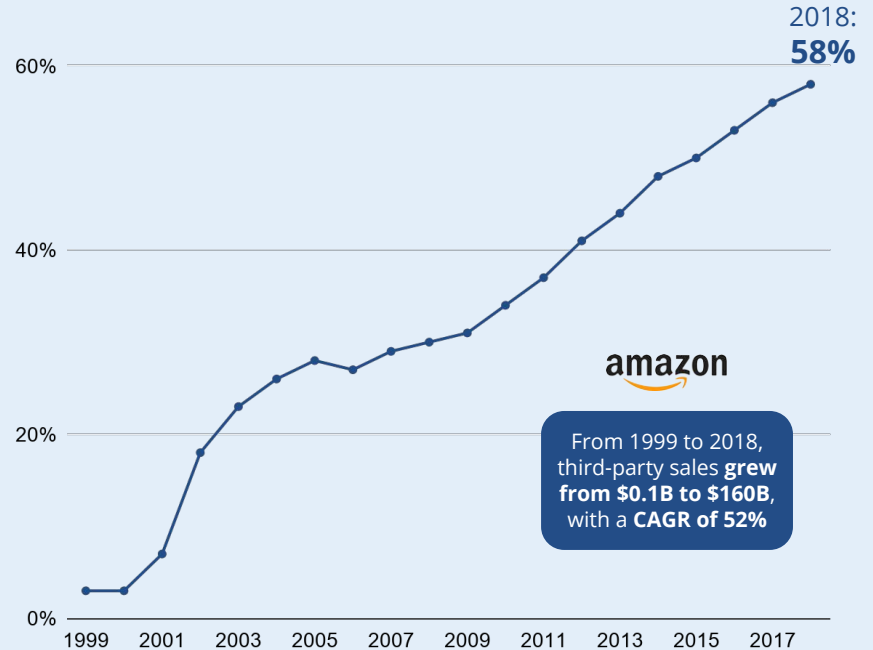


9. eC Marketplaces Now Represent 80% of All Online Sales

Online Gross Merchandise Volume, Top 20 eCommerce Companies, by sales type
(Global, 2018 % of total GMV)






Physical Gross Merchandise Sales on Amazon by Independent Third-Party Sellers
(Global, 1999-2018, % Total Gross Merchandise Sales)



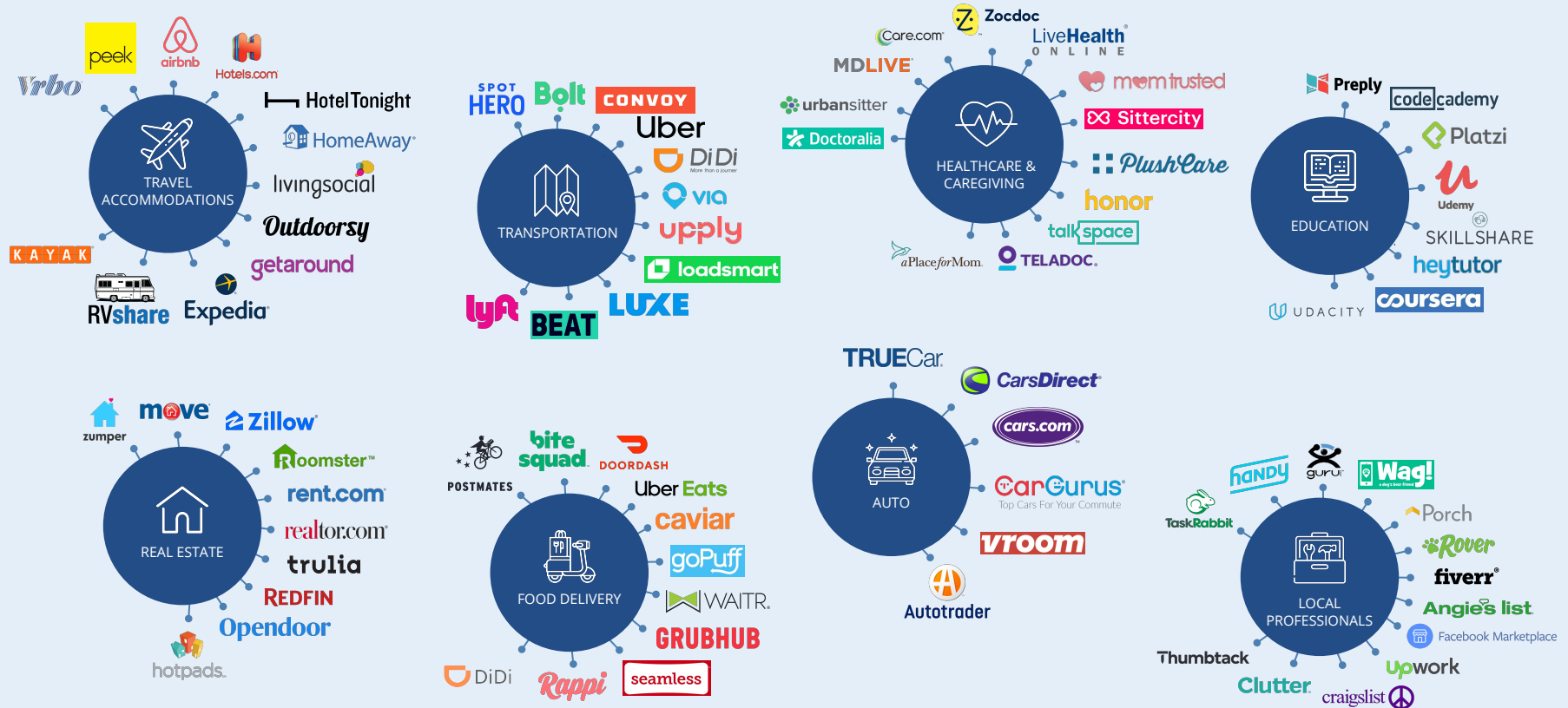
10. Service Marketplaces Growing Faster Than Service Industries

As they connect individual buyers with sellers, eliminating intermediaries.

Travel Accommodations	Global 2018 Revenue USD	Global 2017- 2018 Growth	Vertical Growth
 airbnb	\$3.6B	+ 40%	+ 4%
 HomeAway	\$1.2B	+ 29%	
 Expedia	\$8.8B	+ 11%	
Booking.com	\$14.5B	+ 15%	
Food Delivery	U.S. 2018 Revenue USD	U.S. 2017- 2018 Growth	Vertical Growth
Uber Eats	\$780M	+ 150%	+ 6%
GRUBHUB	\$1.0B	+ 47%	
 WAITR.	\$69.3M	+ 202%	

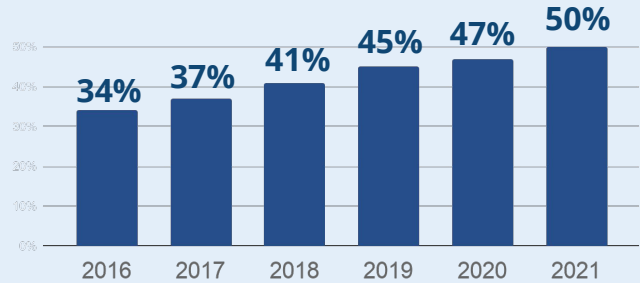
Real Estate	U.S. 2018 Revenue USD	U.S. 2017- 2018 Growth	Vertical Growth
 Zillow	\$1.3B	+ 24%	+ 4%
REDFIN	\$487M	+ 32%	
Transportation	U.S. 2018 Revenue USD	U.S. 2017- 2018 Growth	Vertical Growth
Uber	\$5.1B	+ 34%	+ 3%
 lyft	\$2.2B	+ 100%	
Healthcare & Caregiving	U.S. 2018 Revenue USD	U.S. 2017- 2018 Growth	Vertical Growth
 Care.com	\$173M	+ 10%	+ 3%

11. Niche Marketplaces Reshape Major Industry Dynamics

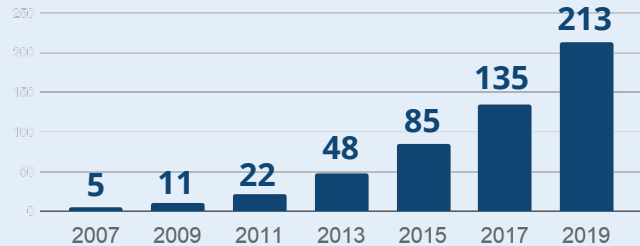


12. Amazon Is the Benchmark - and the Threat - on Most Fronts

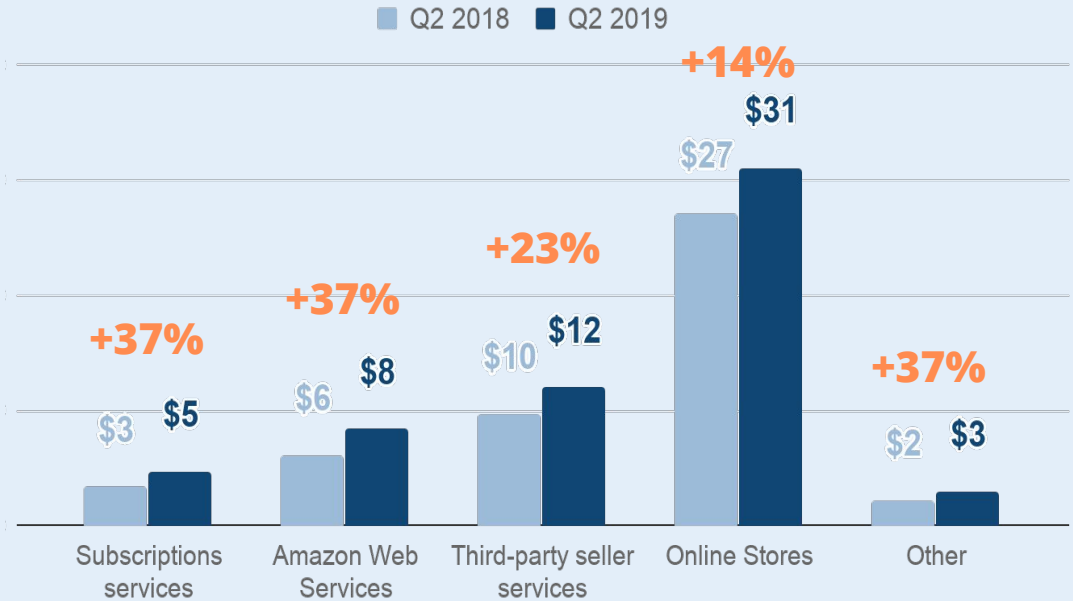
Amazon's Dominance of U.S. eCommerce Will Expand













Annual Reports Mentioning Amazon As a Risk Factor



Amazon: Net Revenue Q2 2018 and Q2 2019, by segment



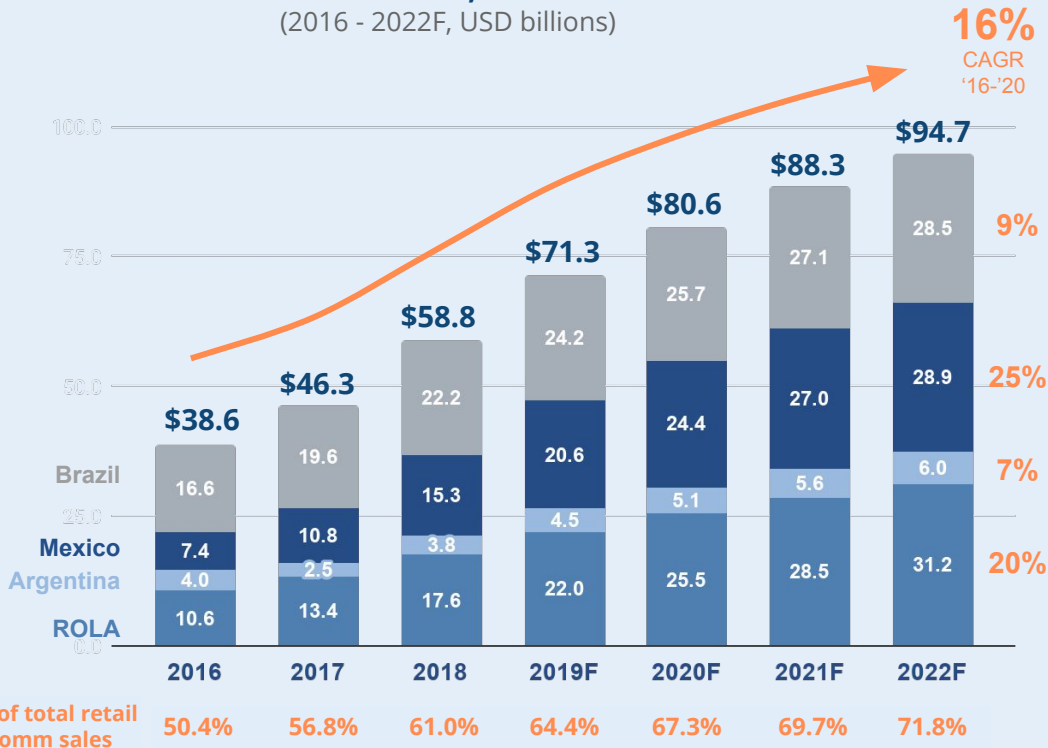
13. Latam Reached 172M Digital Buyers in 2018

	 GDP 2018 in billions USD	 Population 2018 in millions	 Internet Users 2018 in millions	 Smartphone Users 2018 in millions	 Digital Buyers 2018 in millions	Digital Buyers % of Internet users	 mCommerce¹ 2018 in billions USD
 Brazil	\$1,868	209	135	120	61	45%	\$6.7
 Mexico	\$1,223	126	74	63	18	24%	\$5.3
 Argentina	\$518	44	31	22	16	52%	\$0.5
 ROLA	\$1,846	211	163	73	76	47%	\$5.3
Total Latam	\$5,787	641	373	304	172	43%	\$17.8

13. eC in Latam Will Reach \$94Bn Sales in 2022; 16% Annual Growth Since 2016

eCommerce Sales, Latin America

(2016 - 2022F, USD billions)



Latam: Top 10 eCommerce Sites

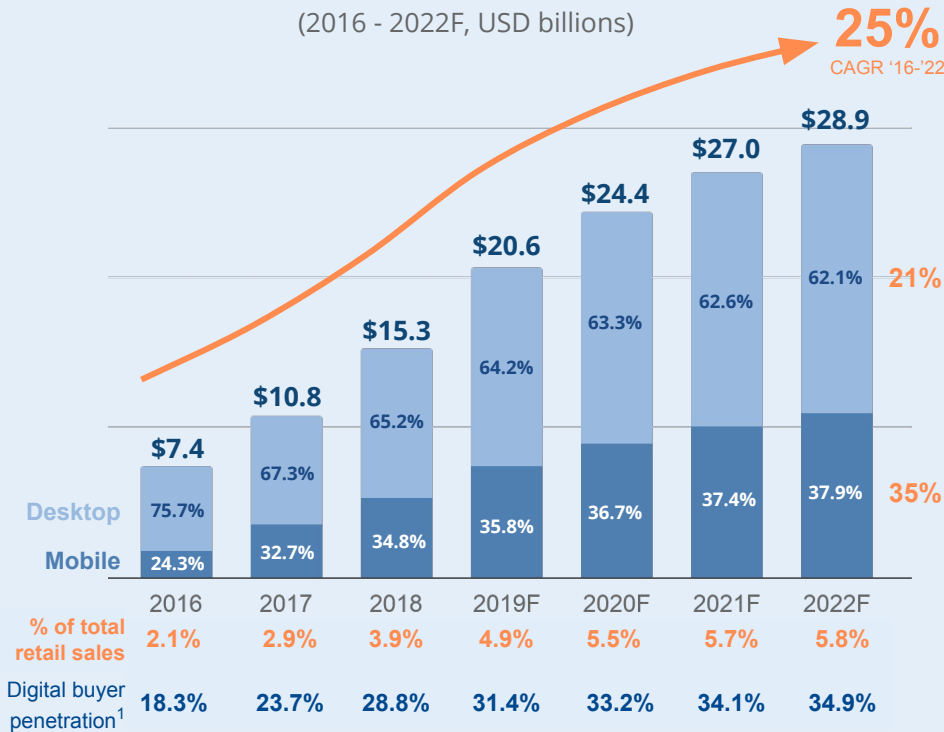
(May 2018, in millions of unique visitors)



14. 2022: Mexico Reaches \$29 Bn USD in eC Sales

Mexico eCommerce Revenues

(2016 - 2022F, USD billions)



Mexico's Online Consumer Profile

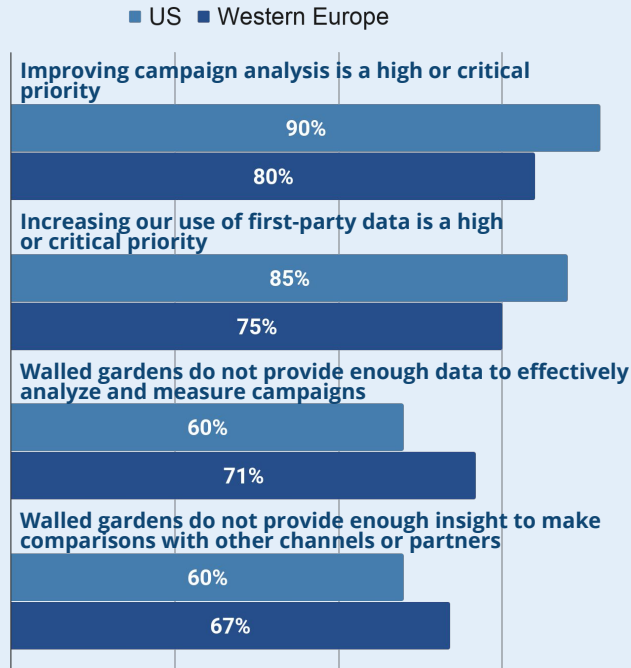
2019



15. Brands and Retailers are Concerned About Walled Gardens¹ of Data

How Do Brand Marketers in Western Europe² and the US Feel About Data and Walled Gardens?

% of respondents, April 2018



How to Approach Walled Garden Strategy



Take control of your data strategy

In order to own your customers, you need to own or have their data, manage how it's used, and determine how it's measured.



Use an independent platform

Build your own marketing infrastructure can be expensive, so finding an independent platform can prove very beneficial.



Demand independent campaign measurement

Asking for independent campaign measurement will ultimately help your campaign down the line.



Get full-funnel analytics

Get the whole picture of your campaign, tracking your customer from the beginning to end.

15 eCommerce Insights for 2020 - Summary

1. eCommerce is **not slowing** and will reach 20% of global retail by 2022
2. **Mobile devices** will account for 72% of digital commerce by 2022
3. **20 players** represent 70% of global eCommerce
4. On the **payment** front, eWallets will represent nearly 50% of all transactions by 2022
5. Brands are using **new technologies** to enhance customer experiences
6. **Big data and analytics** are transforming retail
7. Retail's **artificial intelligence** and **augmented reality** implementations are rapidly expanding
8. Social-network-based sales and connections ("**social commerce**") will become a core marketing skill
9. Mastering **marketplace** use is critical; these spaces represent 80% of all eCommerce
10. **Service marketplaces** are growing faster than their industries
11. **Marketplaces** are also re-shaping major industries
12. **Amazon** is the benchmark and threat in most fronts
13. In **Latin America**, 43% of Internet users are digital buyers; sales will reach \$94 billion by 2022
14. **Mexico** will attain \$29 billion USD in eCommerce sales by 2022
15. Brands and Retailers are Concerned About **Walled Gardens of Data**

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Focused on both the US Latino and Mexican markets, our strengths comprise proven expertise in the telecom, retail & eCommerce, media, marketing and digital transformation.

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