THE GLOBAL RETAIL E-MPIRE

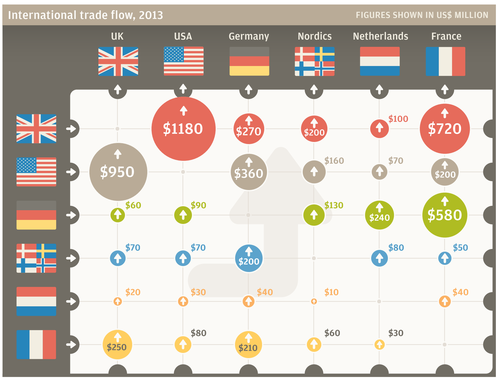
OC&C Strategy Consultants

IN COLLABORATION WITH Google

Online trade for six of the biggest e-commerce markets to grow fivefold to $130 billion in 2020

International trade flow, 2013

FIGURES SHOWN IN US$ MILLION

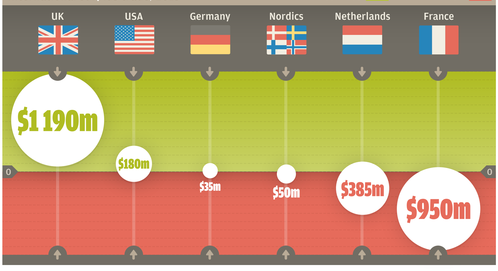


The UK is the world's leading exporter of online goods with a trade surplus of over $1 billion

Nearest challengers US and Germany follow with $180m and $35m trade surpluses respectively

International surplus trade, 2013

TRADE SURPLUS TRADE DEFICIT



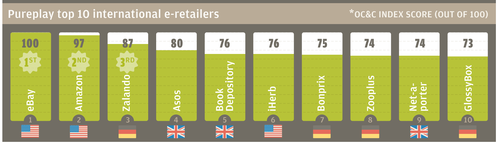
Multi-language websites and global delivery enable expansion

International Proposition of Leading e-retailers by Country, 2013

Pureplay champions are led by eBay, Amazon and specialists

Pureplay top 10 international e-retailers

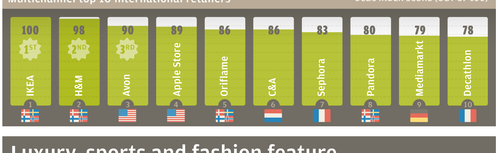
*OC&C INDEX SCORE (OUT OF 100)



The Nordics feature heavily amongst multichannel champions

Multichannel top 10 international retailers

*OC&C INDEX SCORE (OUT OF 100)



Luxury, sports and fashion feature amongst international brand champions

Top 10 international brands

*OC&C INDEX SCORE (OUT OF 100)

Steps for retailers to successfully internationalise

PREPARE → LAUNCH → GROW → LEAD

- **Prioritise** markets and **identify** easy wins
- Establish the **last mile** solution
- **Invest** behind the key markets
- Reinvent your **supply chain**
- Consider **testing** with marketplaces
- Invest in a **scalable payments platform**
- **Localise** where it matters to clients
- Develop a **global view** of customers

- Determine the right **multichannel approach** for you
- Develop and invest in a clear strategy to **build awareness and drive traffic**
- Develop price strategy to **profitably serve international markets**
- **Organise to deliver** your ambition

SOURCE Google Search Data, OC&C analysis, January 2014

* OC&C Index Score International consumer demand is evaluated based on Google search data for international share of search, absolute international search volume, and growth of international search volumes. The criteria carry equal weight and are combined to create an overall rank out of 100 on a log scale