

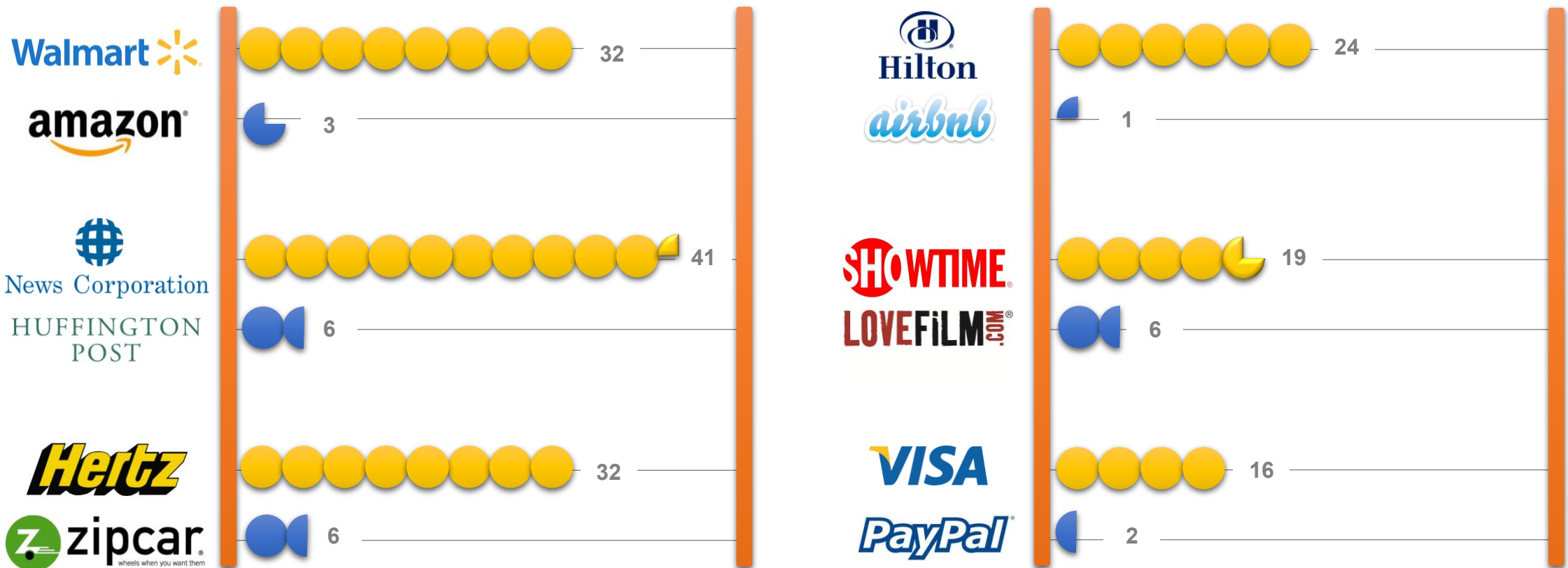


International eCommerce – the future is now

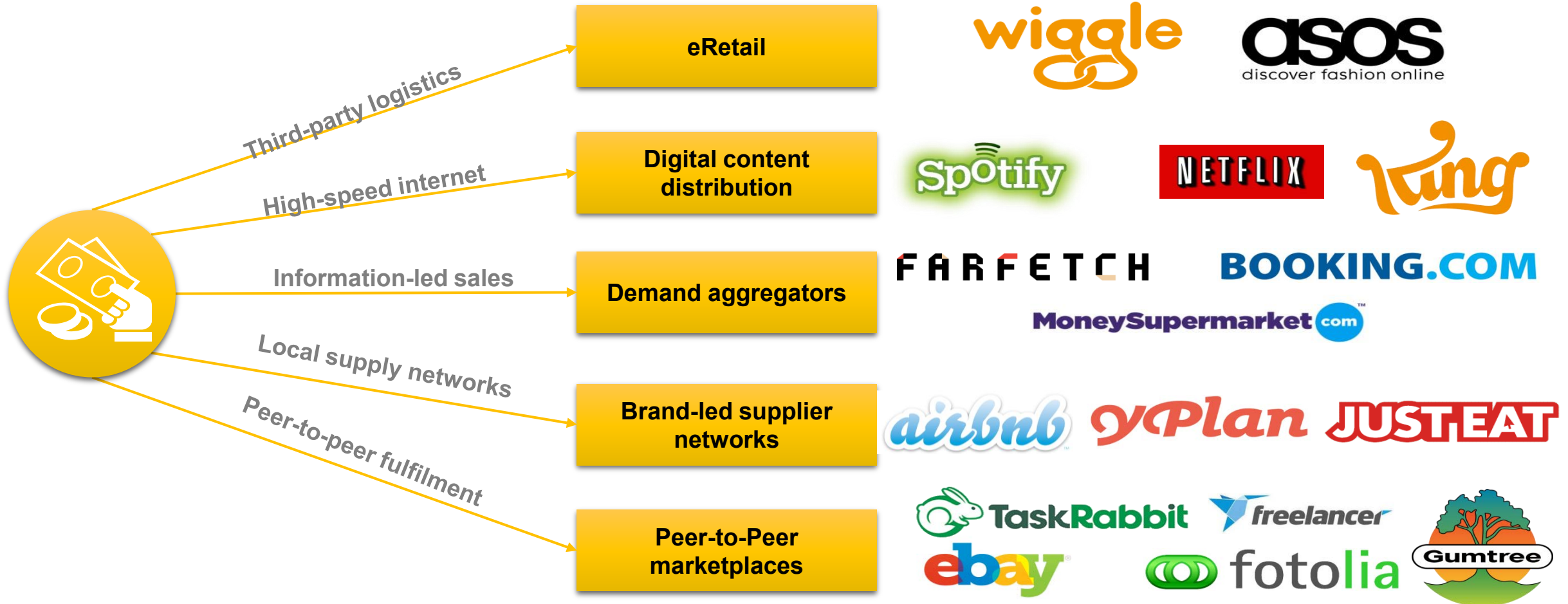
A study on the international opportunity for UK
businesses in today's disrupted markets

New eCommerce players internationalise in years, not decades

Years to expand outside of domestic market

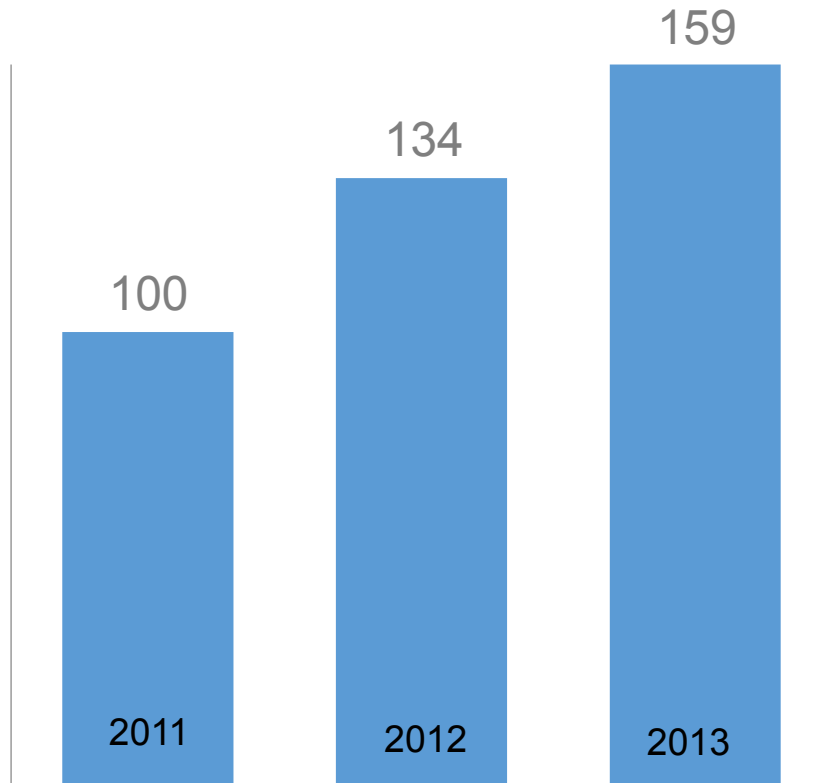


New players, new business models

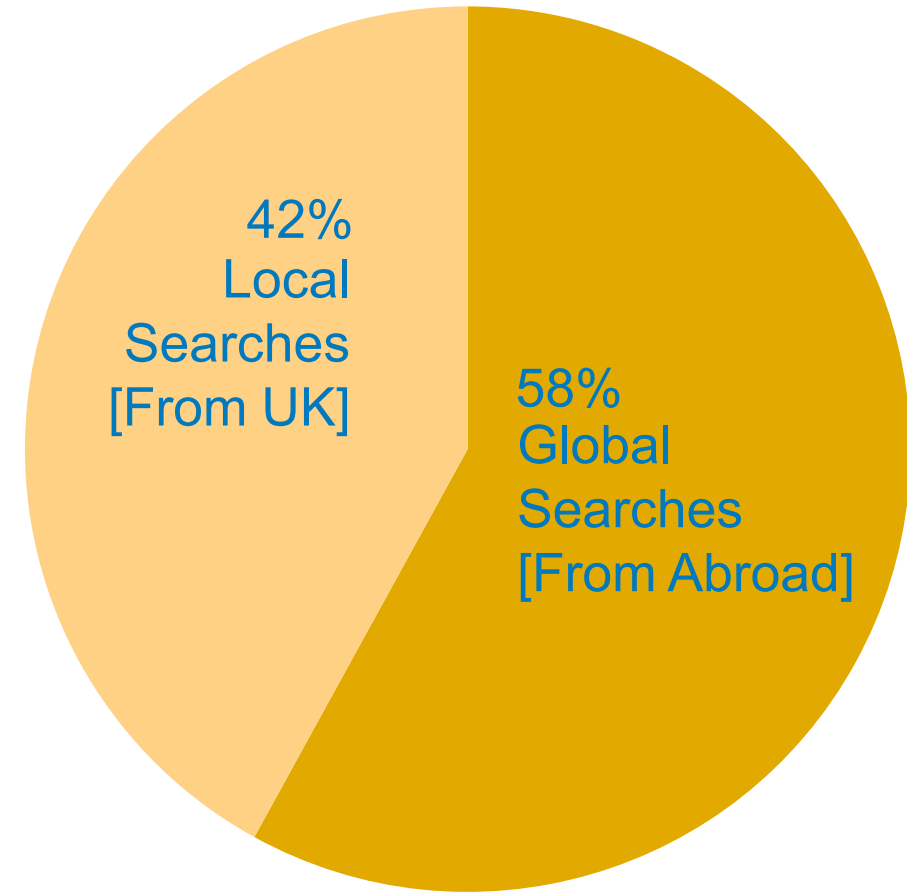


Global nature of search is fundamental enabler for customer acquisition

Consumer search habits

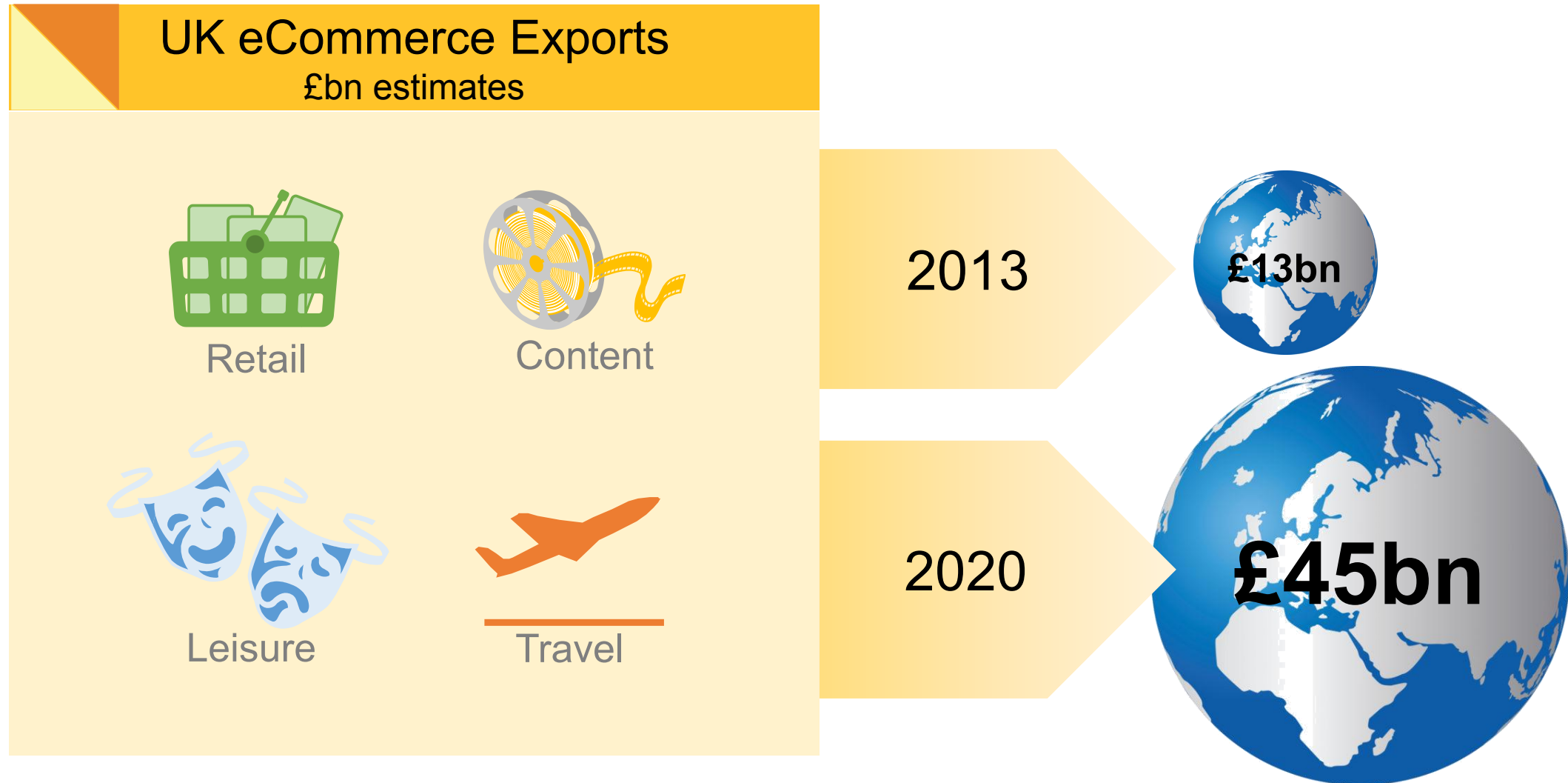


Growth in total search volume¹
Indexed to 100, 2011



Source of searches for UK pure-play retailers

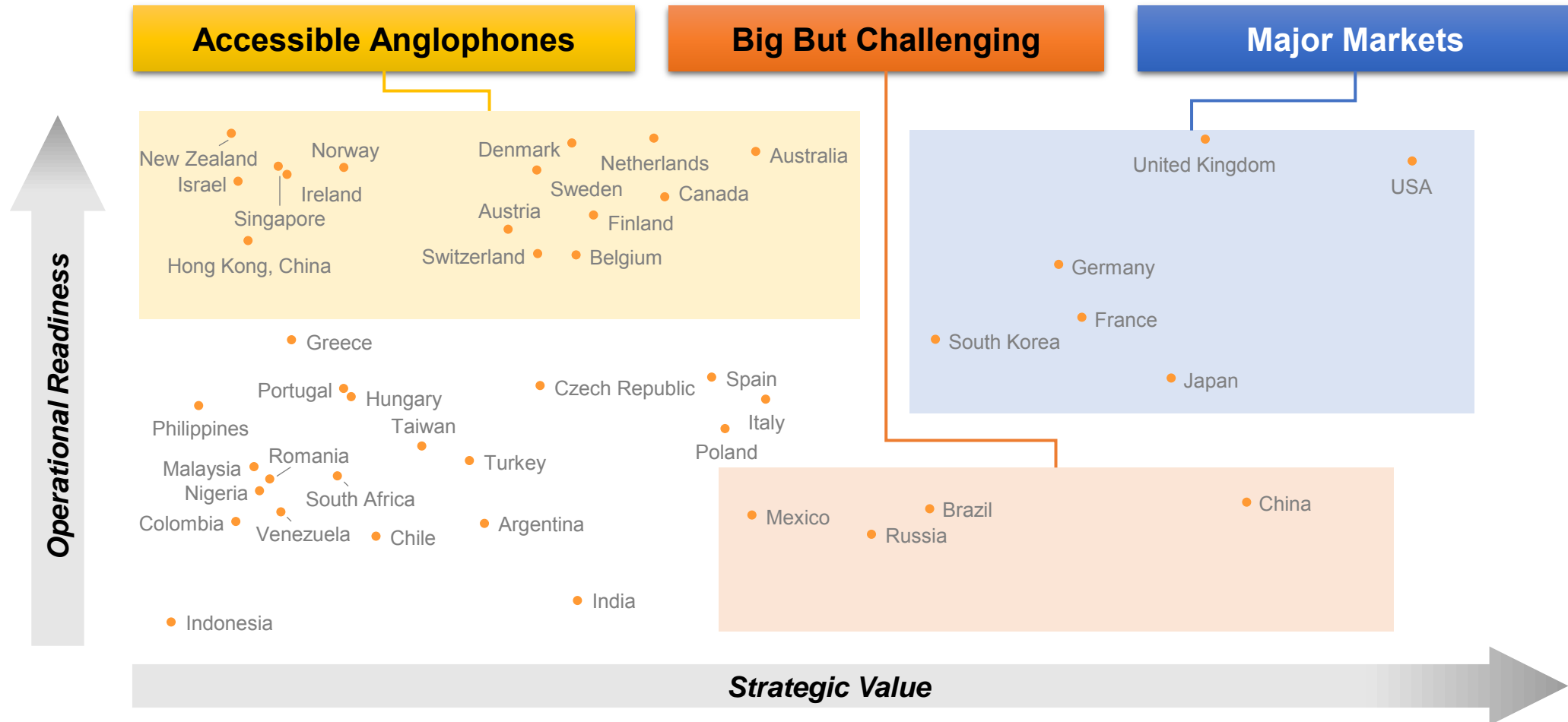
eCommerce exports big growth opportunity for UK based companies



Degree of market readiness critical when prioritising opportunities

Market readiness framework

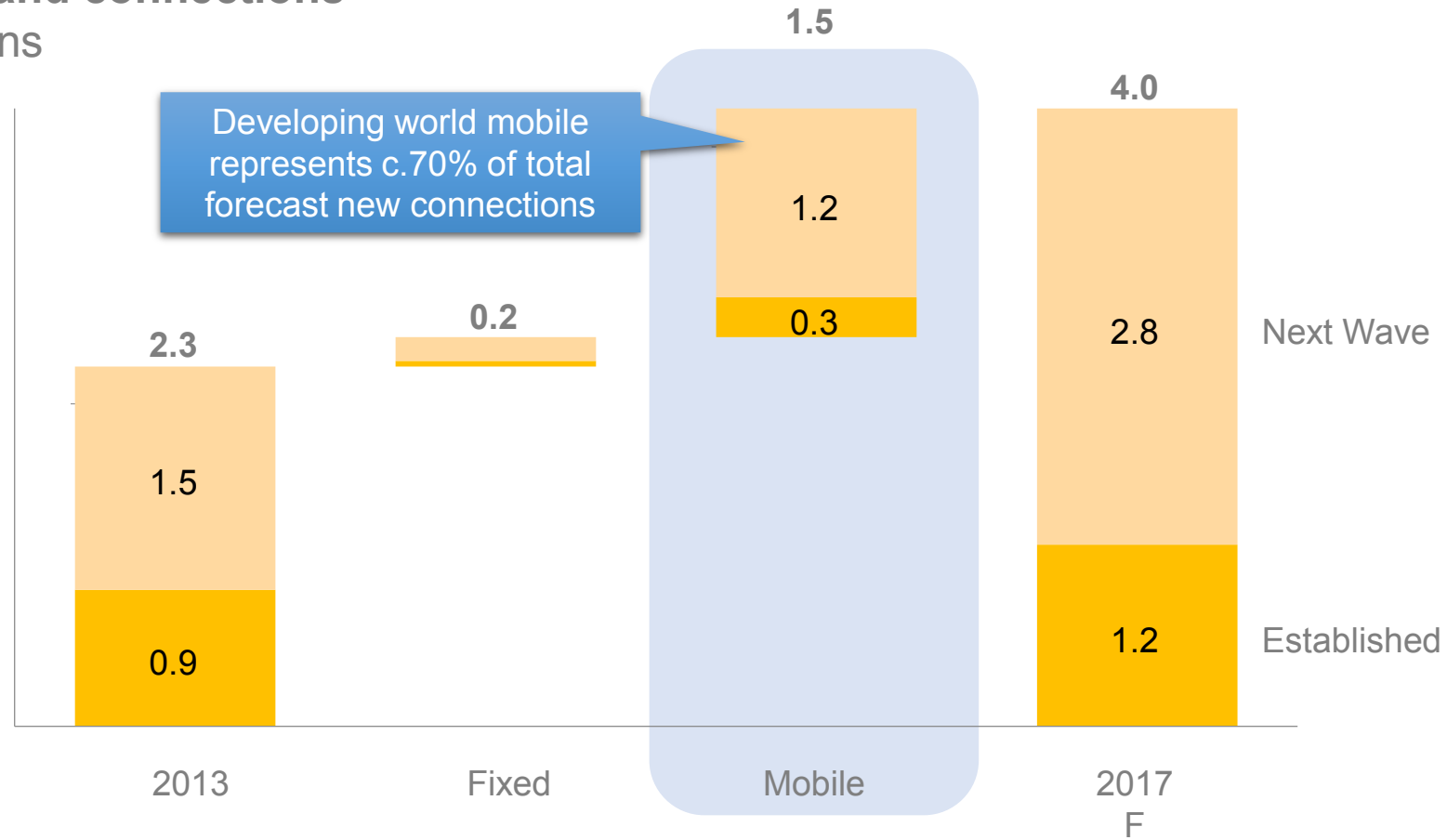
Retail forecast £bn 2020



'mobile-first' propositions will be critical for realising opportunity

Worldwide broadband connections¹

Billions of connections



1. 50 countries + MENA covered in PWC Media Outlook

The rules of the game have changed – no sector is immune

The past

Consumers search and discover products **locally**

National boundaries a barrier to new competitors

Your competitors **looked like you**

International expansion typically **capital intensive**

Proposition **tuned for physical** channels, with **desktop** and **mobile bolted on**



The future is now

Consumers use the internet as a **global shop window**

Expect to be surprised by **international competitors**

Your competitors take **unexpected forms**

Players are able to access more **capital-light models of expansion**

Mobile and digital-first proposition geared around the 'always on' consumer

This new world brings new questions for CEOs

