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Study of Ecommerce Mexico 2015

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Objective and Vision of the Study

The Mexican Internet Association, A.C. (AMIPCI) integrates the companies that represent an influence on the development of the Internet industry in Mexico. Every year, the AMIPCI undertakes the task of carrying out studies based on the use of Internet in Mexico to guide and promote market growth.

Aware of the need to understand and analyze the aspects that can affect the e-commerce in our country, AMIPCI presents the Study of Ecommerce Mexico 2015, which is already the 10th version and is divided into two sections, that investigates components Ecommerce: Online Buyers and Ecommerce Landscape.

The study was conducted through the auspices of the Mexican Association of Online Sales (AMVO), IBM, VISA, Prosoft 3.0 and the Ministry of Economy. The realization was conducted by comScore.

Analyses were performed by interviewing online buyers in Mexico and the leading e-commerce players in the country to have the vision of both supply and demand.



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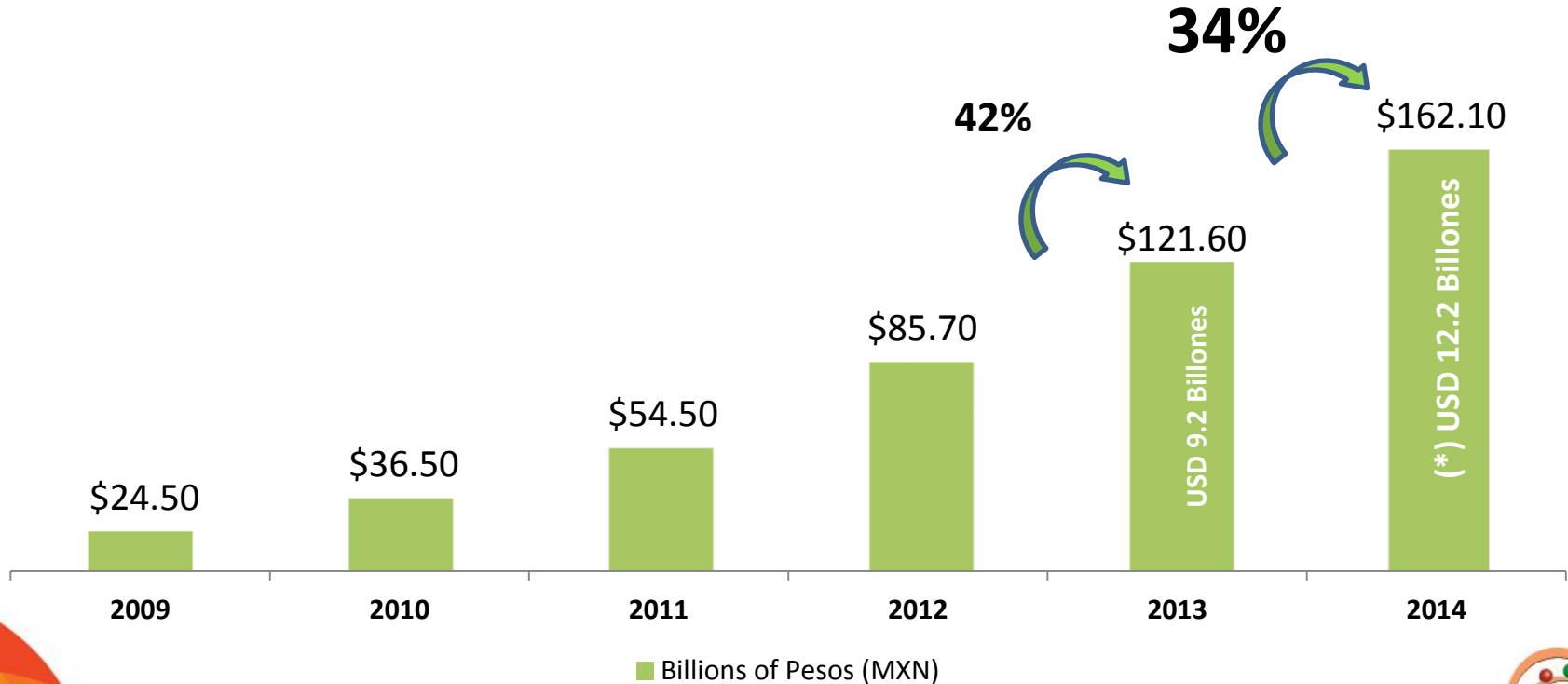


Estimated market value of e-commerce in Mexico 2014

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Development of Ecommerce in Mexico



(*) Average Exchange rate: MXN 13.28 x 1 USD



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Analysis of Consumer Experience

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Objectives & Methodology

Research Objectives:

- Quantify e-Commerce value and volume in Mexico by device type and category.
- Understand preferences and satisfaction of digital shoppers.
- Understand barriers to digital shopping and how merchants can overcome them.
- Know the most important factors to make an online purchase.
- Identify the problems for which a transaction is not completed.

Study Methodology:

- Members of an online survey panel were contacted via email by comScore.
- A total of 1,243 respondents completed the survey.
- Qualified respondent: Made an online purchase using a computer, smartphone, or tablet in the past 3 months (January 2015-March 2015).
- 52-question survey, which took an average of 21 minutes to complete.
- Data weighted to *comScore Media Metrix* audience prior to analysis.
- Confidence level of 95%, standard error: +/- 2.53%



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Digital Purchase Behavior

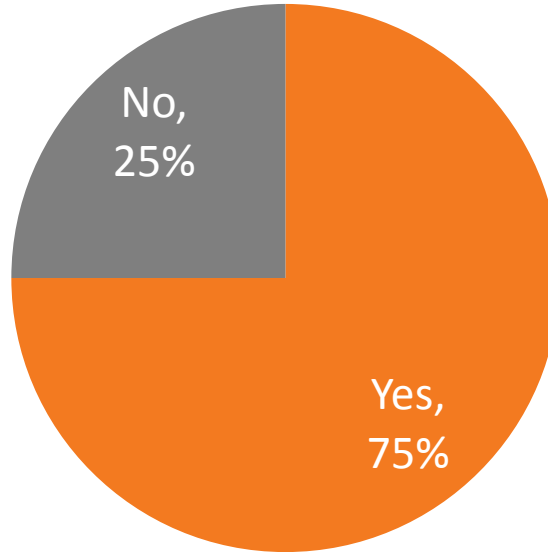
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Three-quarters of online Mexicans made an online purchase during the first quarter of 2015.

The growth of online shopping is heavily influenced by mobile shopping (tablet and smartphone), especially in the category Digital Downloads

Overall Online Purchase Incidence
(Past 3 Months)



Consumers aged 18 to 34 years bought more digital content than those of 35 years or more.

Q1B. How many online transactions did you make using each device in the past 3 months? Please provide your best estimate of the number of times you have paid for something online.
Base: Total respondents (n=1,243) + screened respondents (n=417)

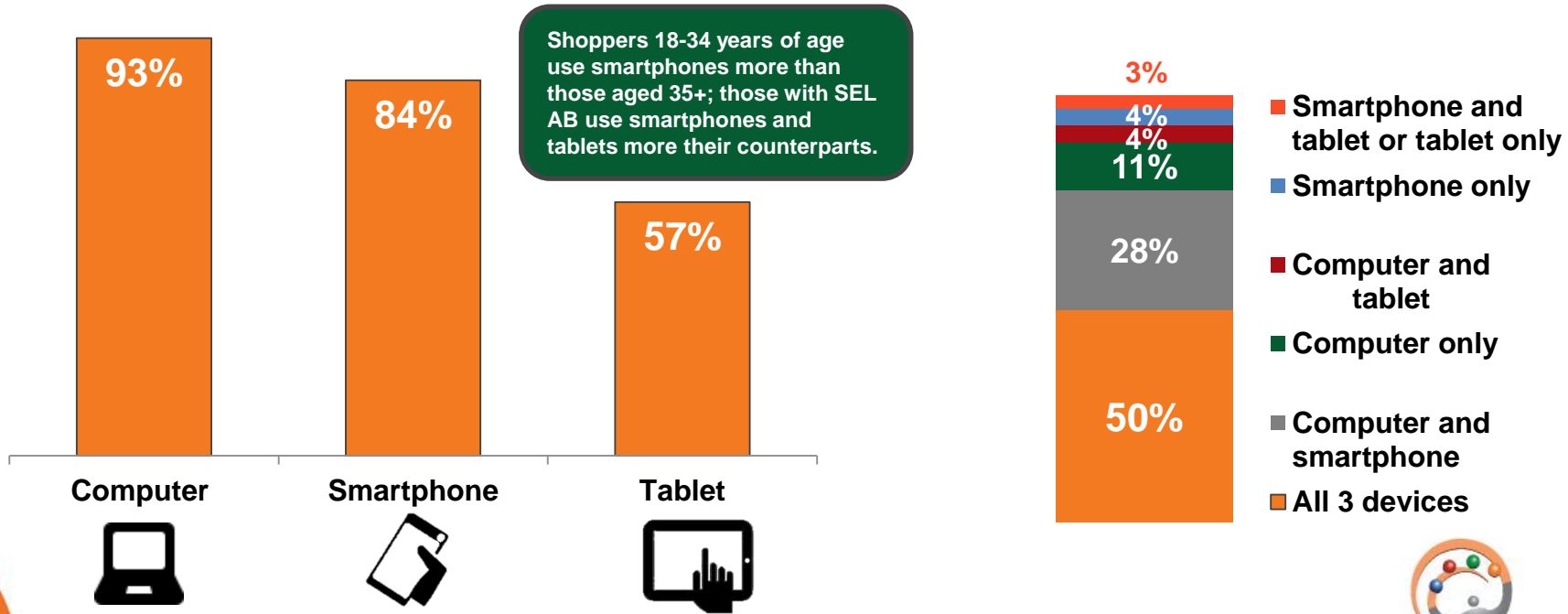


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Device ownership is high, and half of online shoppers have all three devices (computer, smartphone, and tablet).

Device Usage



S1. Among the devices listed below, which do you own or regularly use? Please select all that apply
 Base: Total respondents (n=1,243)

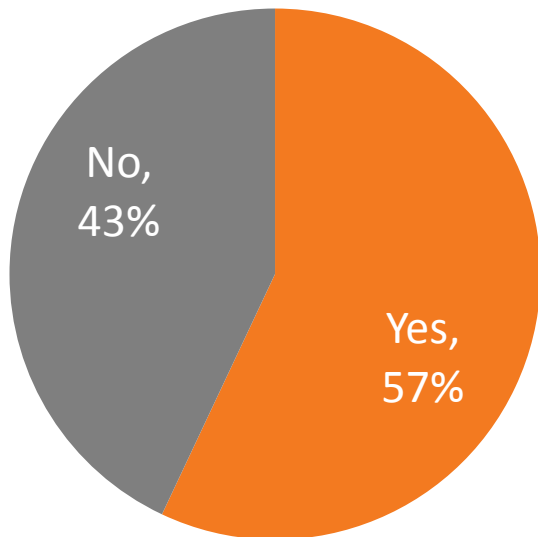


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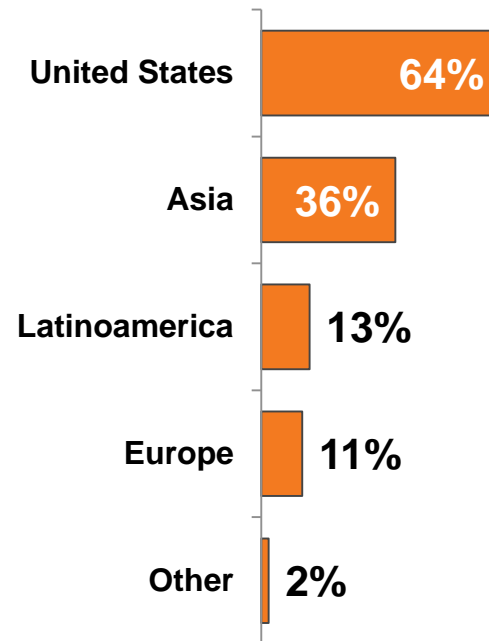


Over half of shoppers purchased from an international retailer, with the U.S. being the top source for imported items.

International Purchases



Country Purchased From



Q2. In the past year, have you made an online purchase from an internationally-based retailer (i.e. located outside of Mexico) and had it shipped to you or someone else in Mexico? | Base: Total respondents (n=1,243)

Q2b. In which country or countries were those internationally based retailers located? Please select all that apply. | Base: International online shoppers (n=707)



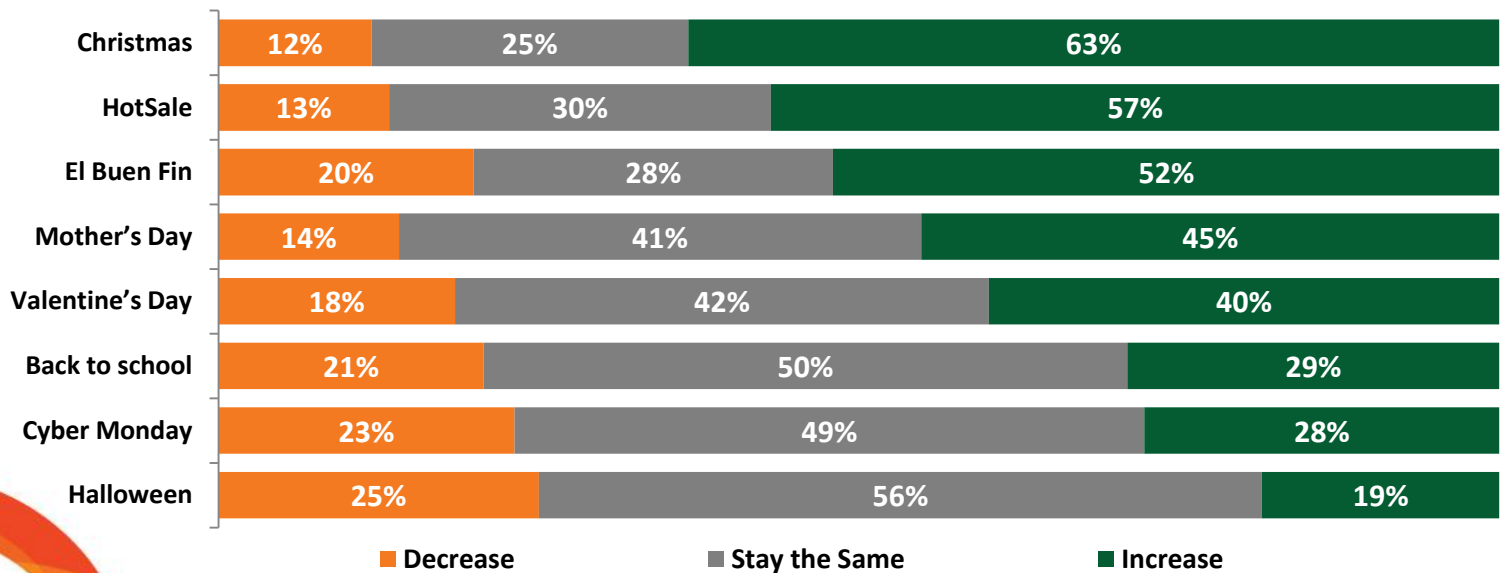
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Shopping and buying are expected to increase around all holidays except for Halloween/*Día de Muertos*

More shoppers with SEL AB said their shopping would increase at Christmas and HotSale than those with SEL C or below.

Expected Change in Shopping Habits by Holiday



Net Change:

- Christmas: 51%
- HotSale: 44%
- El Buen Fin: 32%
- Mother's Day: 31%
- Valentine's Day: 22%
- Back to school: 8%
- Cyber Monday: 5%
- Halloween: -6%

Q6. Comparing your everyday online shopping habits with your habits around holidays, how did or do you expect your online shopping and buying to change around each of these holiday periods in 2015?
Base: Total respondents (n=1,243)



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Digital Spending



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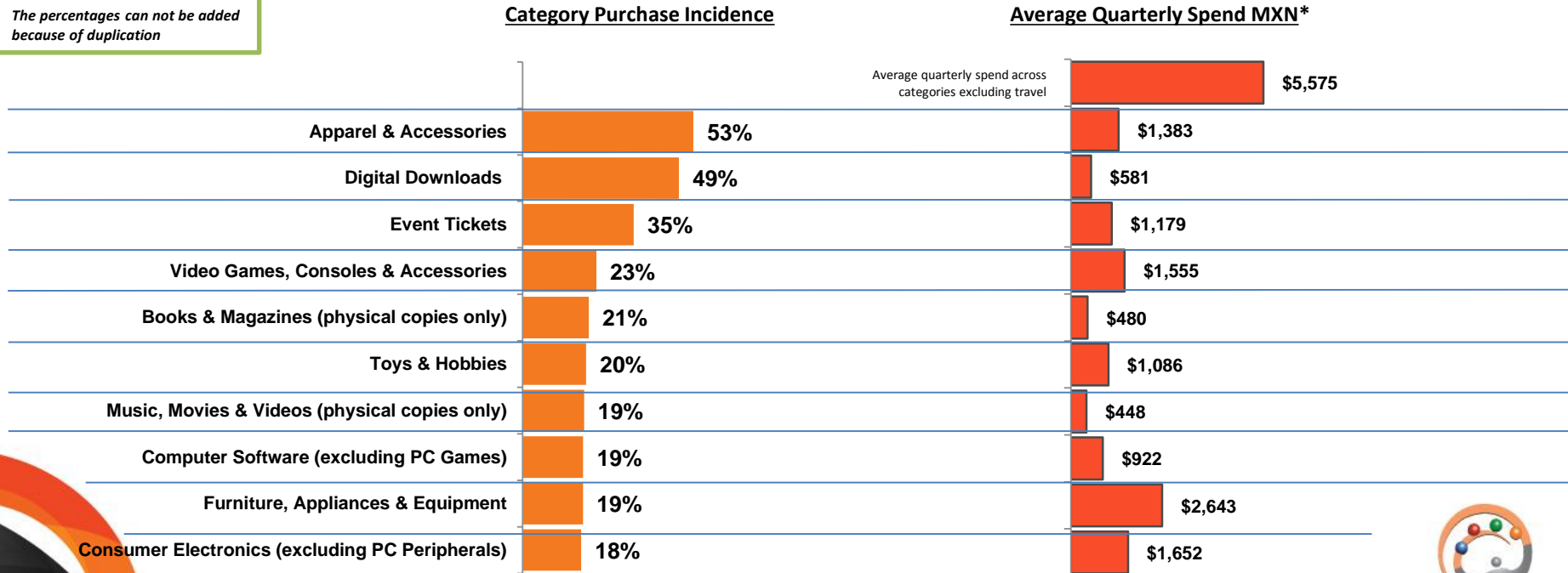
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The three top categories purchased online were Apparel & Accessories, Digital Downloads, and Event Tickets; the most money was spent within the Computer and Furniture categories (excluding travel).

Category purchased and Amount Spent Across All Devices

The percentages can not be added because of duplication



Q3. Please take a close look at the table below. Under each category, enter the amount of money in pesos you spent online in the first 3 months of the year, January 2015 – March 2015, from each type of device you have used for online transactions. Base: Total respondents (n=1,243); *Actual base size for the mean of each category varies and is determined by the incidence of that category.



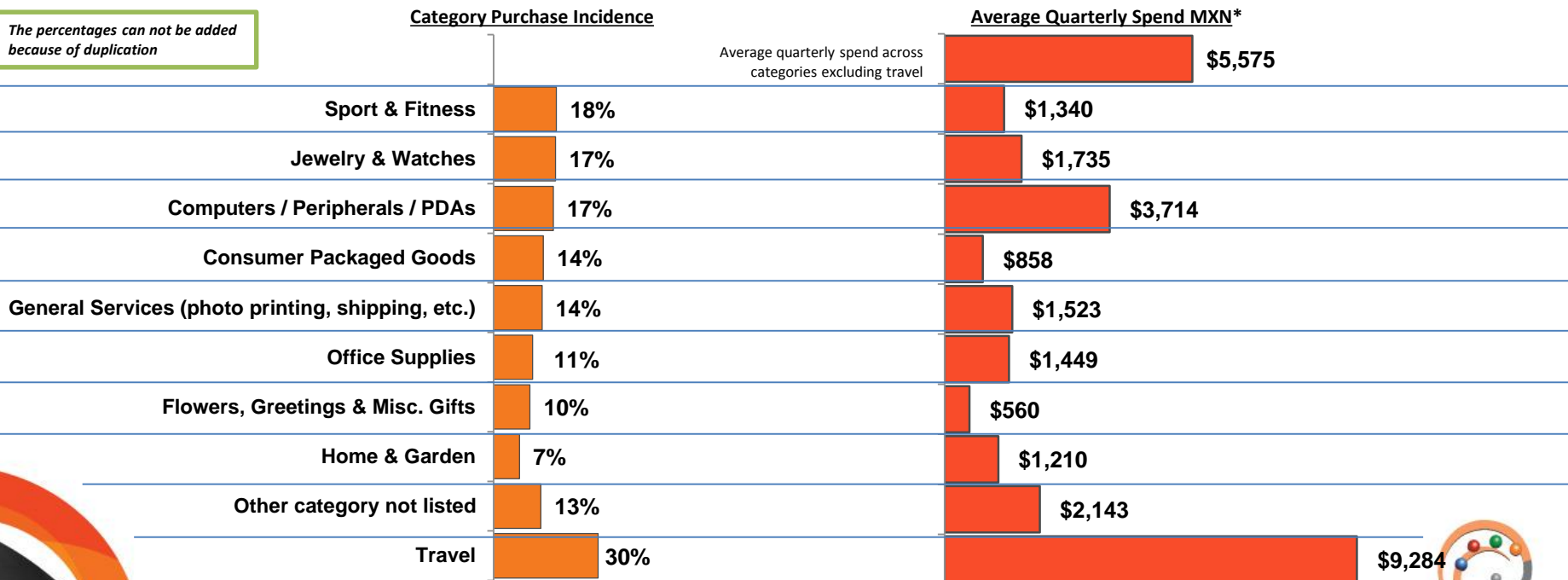
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Three in ten shoppers made a travel purchase in the past three months. The highest average spend was MXN\$9,284, almost 67% above the average of other non-travel-related categories.

Category Purchased and Amount Spent Across All Devices (continued)

The percentages can not be added because of duplication



Q3. Please take a close look at the table below. Under each category, enter the amount of money in pesos you spent online in the first 3 months of the year, January 2015 – March 2015, from each type of device you have used for online transactions.
 Base: Total respondents (n=1,243); * Actual base size for the mean of each category varies and is determined by the incidence of that category.



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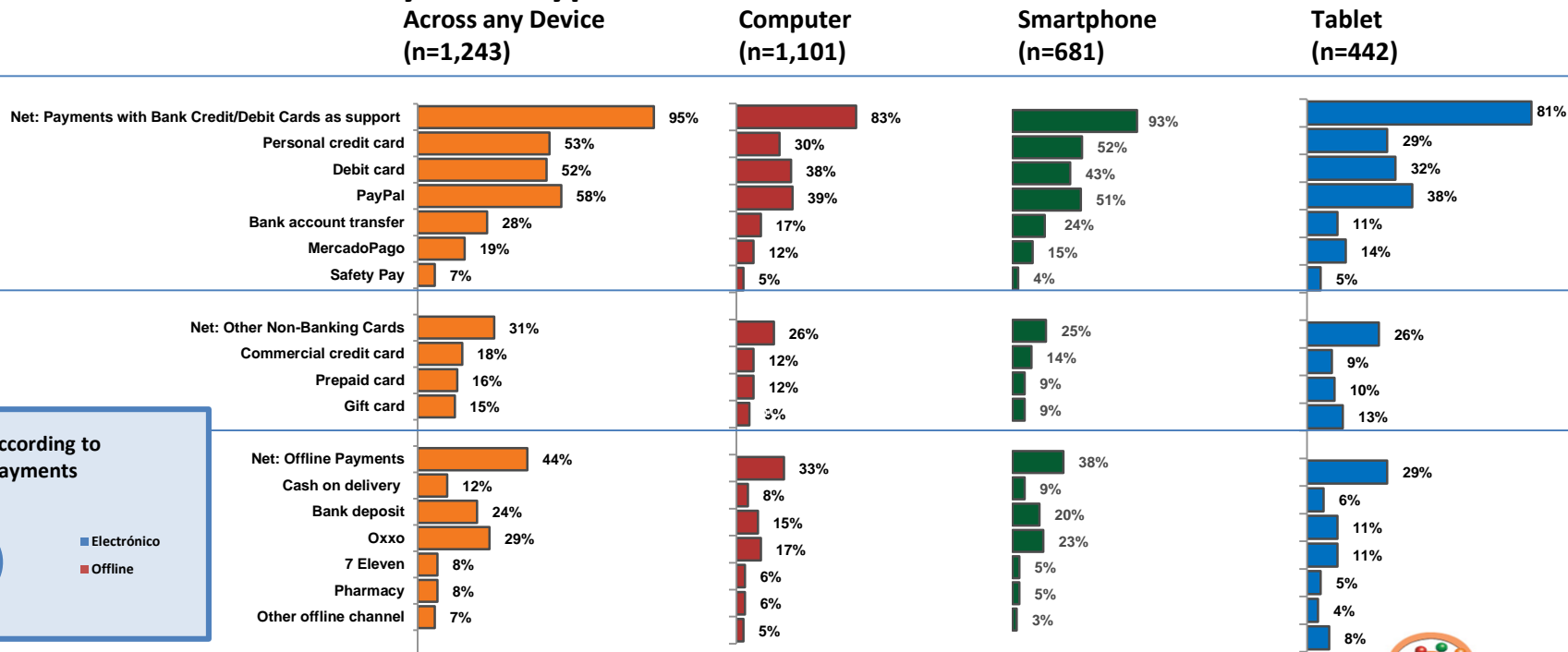
Payments & Transactions

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Funding payments from a bank account (Credit Card, Debit Card, PayPal, MercadoPago, SafetyPay and Bank Transfer) dominate in Mexico

Payment Types Used Past 3 Months



Classification According to Number of Payments

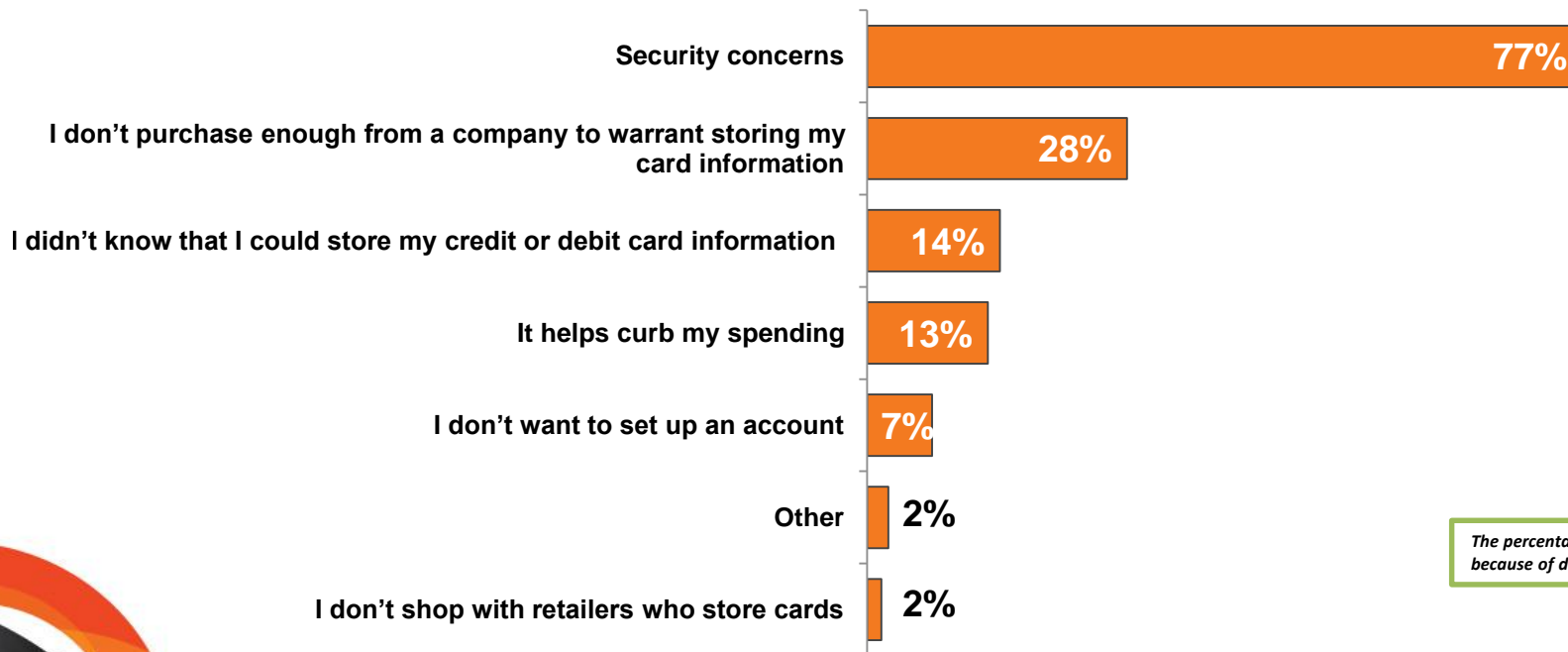


■ Electrónico
■ Offline

Q4A. Which payment types/channels did you use for the online purchases you made in the past 3 months? Please select all that apply for each column. Base: Device purchasers

Security concerns are the leading reason for not storing information with online retailers.

Reasons for Not Storing Credit/Debit Information with Online Merchants



The percentages can not be added because of duplication

Q10b. What are your reasons for not storing your credit or debit card information (e.g., card number, billing address, etc.)?
Base: Do not store any information with online merchants (n=430)



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Digital Shopping Experiences

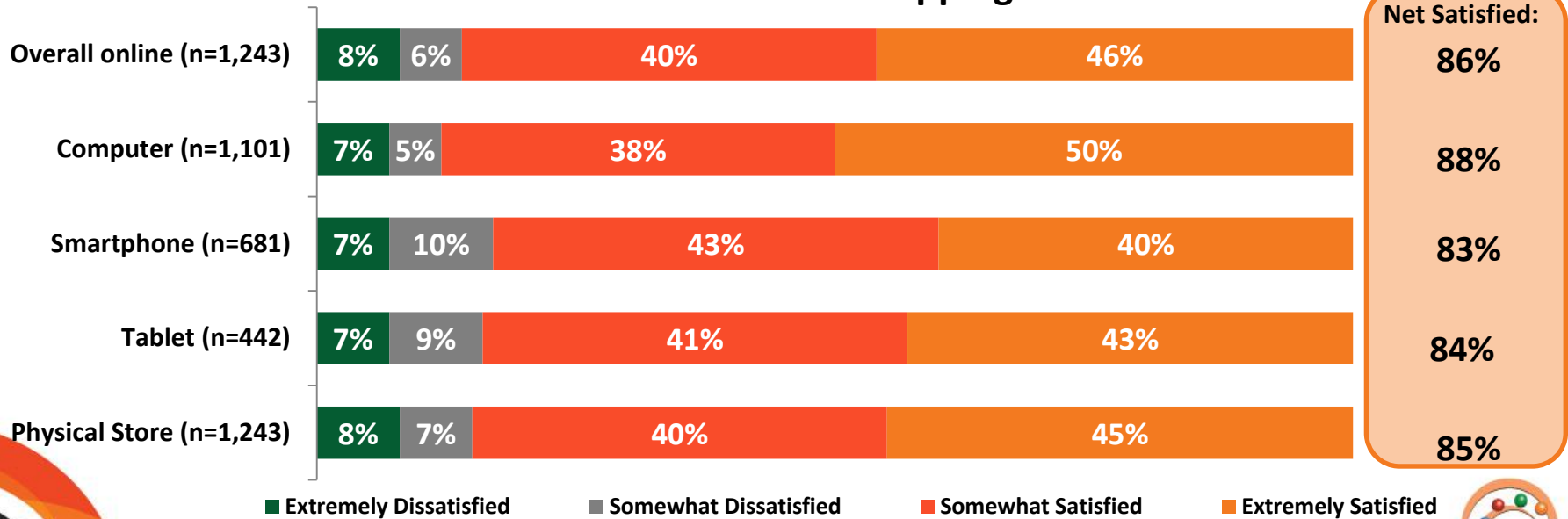
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Shoppers are highly satisfied with shopping both online and in a physical store.

Shoppers 35 years and older are more satisfied with online shopping in general, smartphone shopping and shopping in a physical store than those 18-34.

Satisfaction with Shopping



Q5A. How satisfied are you with your overall shopping experience(s) in the last three months?
Base: Device purchasers



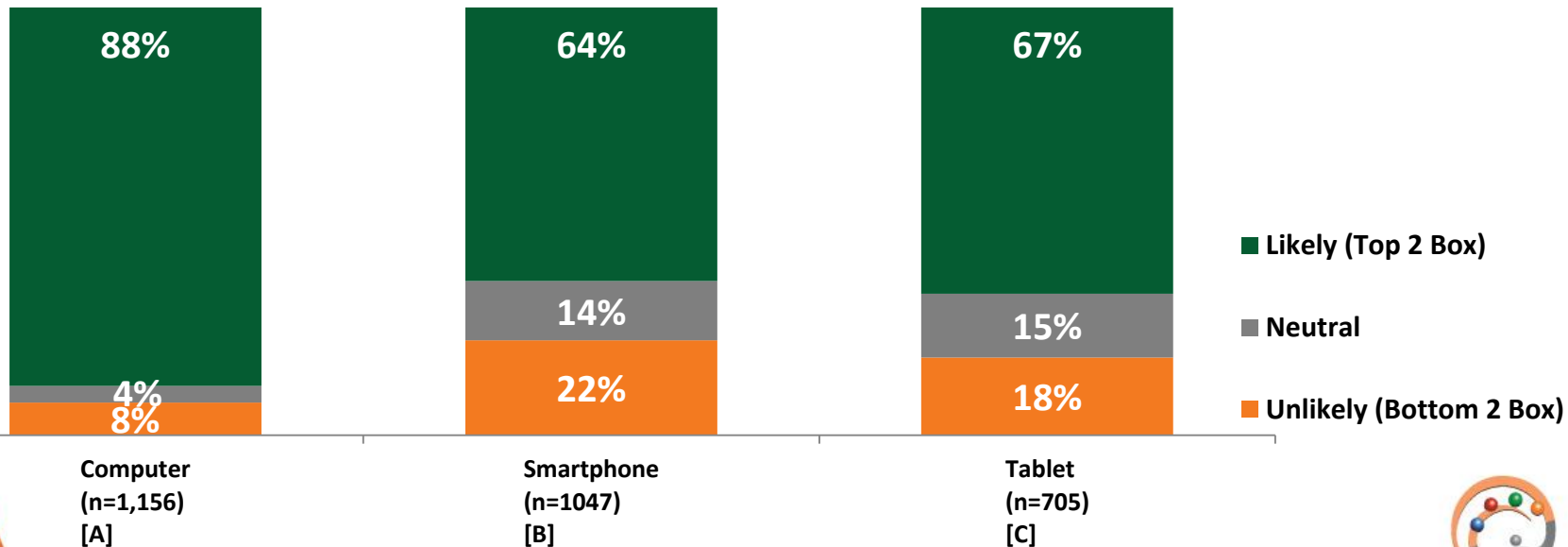
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The majority of all shoppers are likely to purchase across devices; however, intent is highest on a computer and lowest on a smartphone.

Males are more likely to make purchases on a computer in the next three months than females (92% vs. 85%).

Intent to Purchase in the Next 3 Months



Q5B. How likely are you to make a purchase using each of these devices in the next three months?
Base: Device users



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Mobile Shopping Experiences

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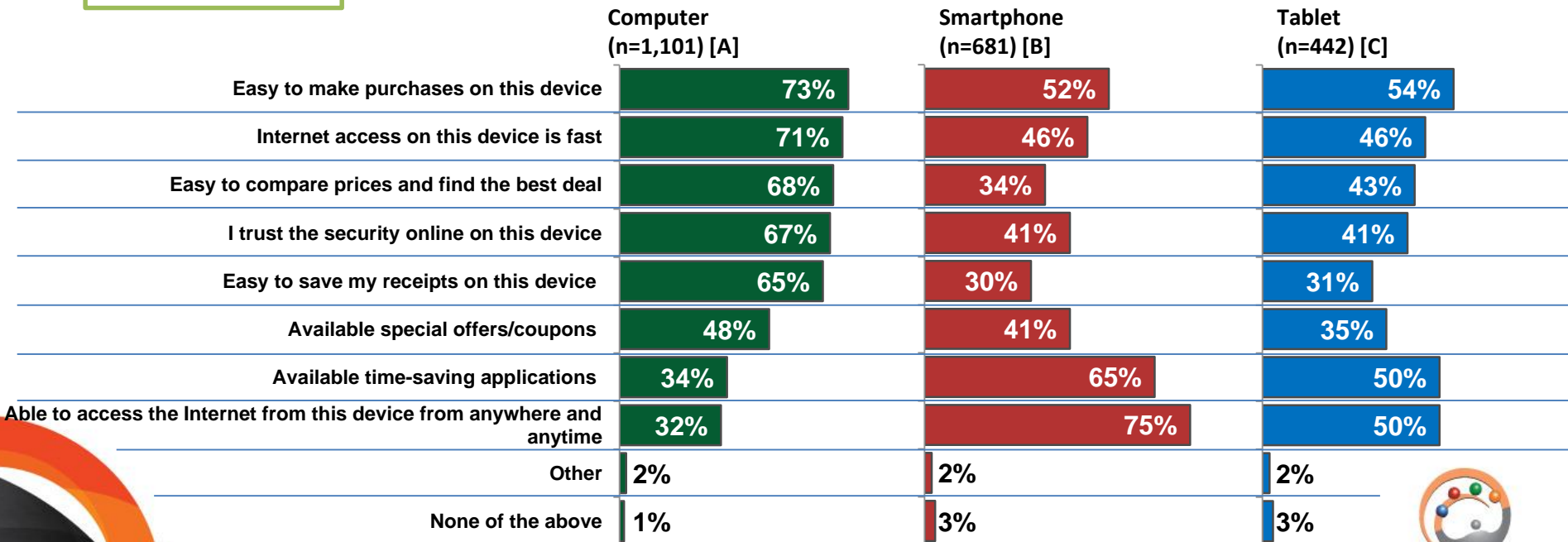


Mobile device purchasers indicate they do so because of time-saving applications and the ability to access the Internet from anywhere and anytime compared with a computer.

Reasons for Device Choice for Online Purchases

Males trust security more than females on a Smartphone (45% vs. 36%) and Tablet (49% vs. 33%).

The percentages can not be added because of duplication



Q7. Why do you use each of the following devices to make purchases online?
Base: Total respondents (n=1,243)



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About three in five mobile device users have used their device to research product details, compare prices, and find nearby stores.

Shopping Activities Conducted on Mobile Device(s)

The percentages can not be added because of duplication



Shoppers 18-21 use their mobile devices to research product details (71%) more than those who are 22 years and older.

Q8a. Which of the following activities have you conducted on your mobile device?
Base: Mobile device users (n=1,103)

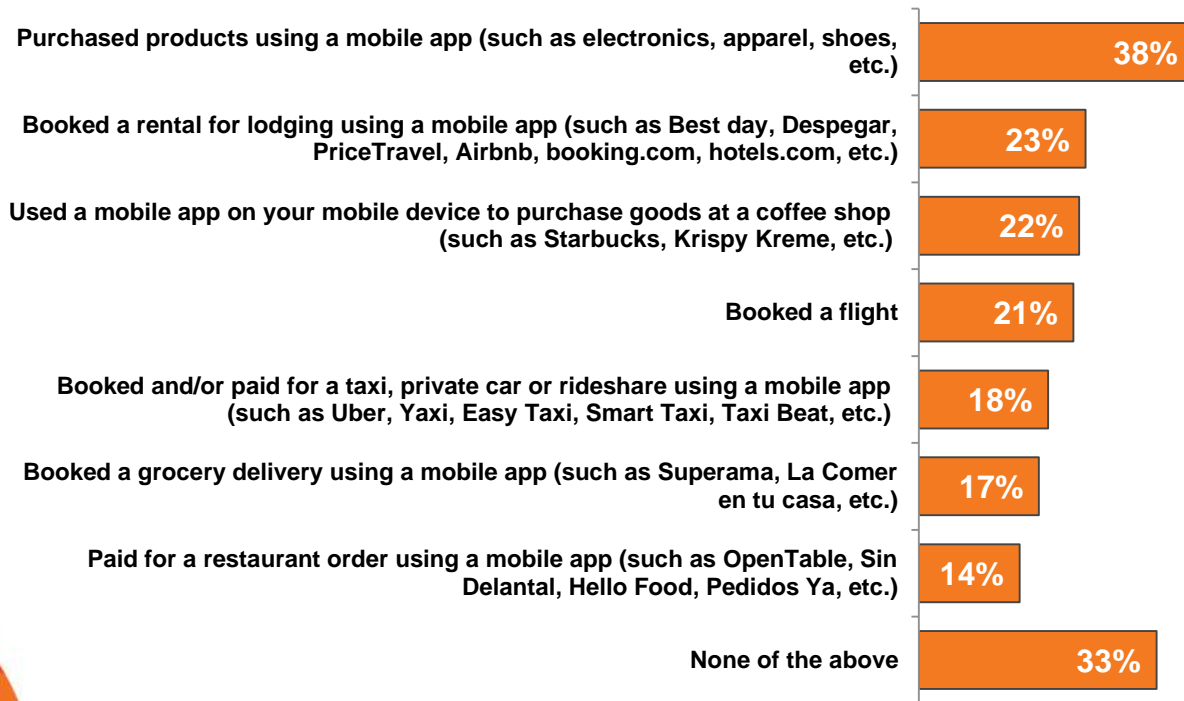


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Over a third of mobile device users say they have purchased products using a mobile app.

Mobile Device Transactions Conducted



Younger shoppers have done these activities more than shoppers 35 years and older.

Q13d. Which of the following activities have you done using your mobile device?
Base: Mobile device users (n=1,103)



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Executive Summary

- **Three-quarters of online Mexicans are online purchasers based on reported purchase activity from January to March 2015.**
 - More than one-half made non-domestic purchases during this period.
 - The volume of online buyers has grown strongly influenced by the purchase of digital downloads from mobile devices
- **Average quarterly spending across all devices and non-travel categories was MX\$5,575 approximately MXN\$1,860 pesos spent online per month .**
- **Two-thirds of shoppers use a mobile device (smartphone and/or tablet) for their online purchases, with just one-third using a PC device exclusively.**
- **Mexicans like using mobile devices for their ease in accessing the Internet, as well as for the ability to use retailer apps, which can save time.**
 - Seven in ten mobile users have shopped within retailers' apps, and more than one-third have made in-app purchases.



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Executive Summary

- **95% of online buyers have used some type of payment funded with bank accounts or credit or debit cards, and 44% also continue using Offline payment methods.**
- **Overall satisfaction with online shopping is high, on par with consumers' satisfaction with shopping in physical stores. Online purchasers are very likely to continue buying online in the future, particularly using a PC.**
 - Shoppers expect their shopping to increase around all holidays except Halloween/*Día de Muertos*. The largest increases are expected around Christmas, HotSale, El Buen Fin, and Mother's day.



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Objectives & Methodology

Research Objectives:

- Quantify the value and volume of e-commerce sales in Mexico
- Understand expected sales increases and decreases around holidays
- Determine payment types accepted
- Determine promotions used by retailers
- Understand website features
- Quantify the value of the physical store versus online store.

Study Methodology:

- Online merchants were sent an email invitation by AMIPCI with a link to the survey.
- The survey had up to 20 questions and took an average of 10 minutes to complete.
- 75 respondents who work in e-commerce sales completed the survey.



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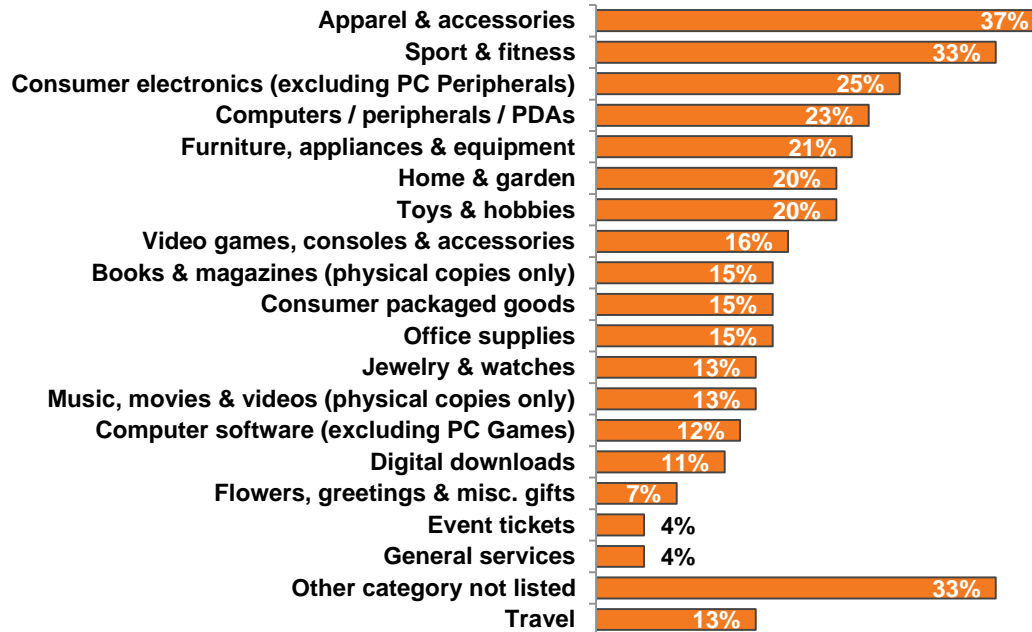
E-commerce Landscape

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Apparel, sports & fitness, other and consumer electronics are the top four categories sold among these retailers.

Categories of goods and services sold online



Q1. Which of the following categories of goods and services do you or your organization sell online?
Base: All retailers (n=75)



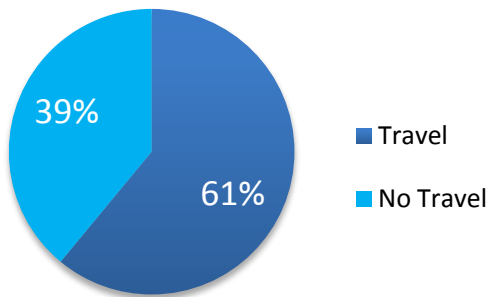
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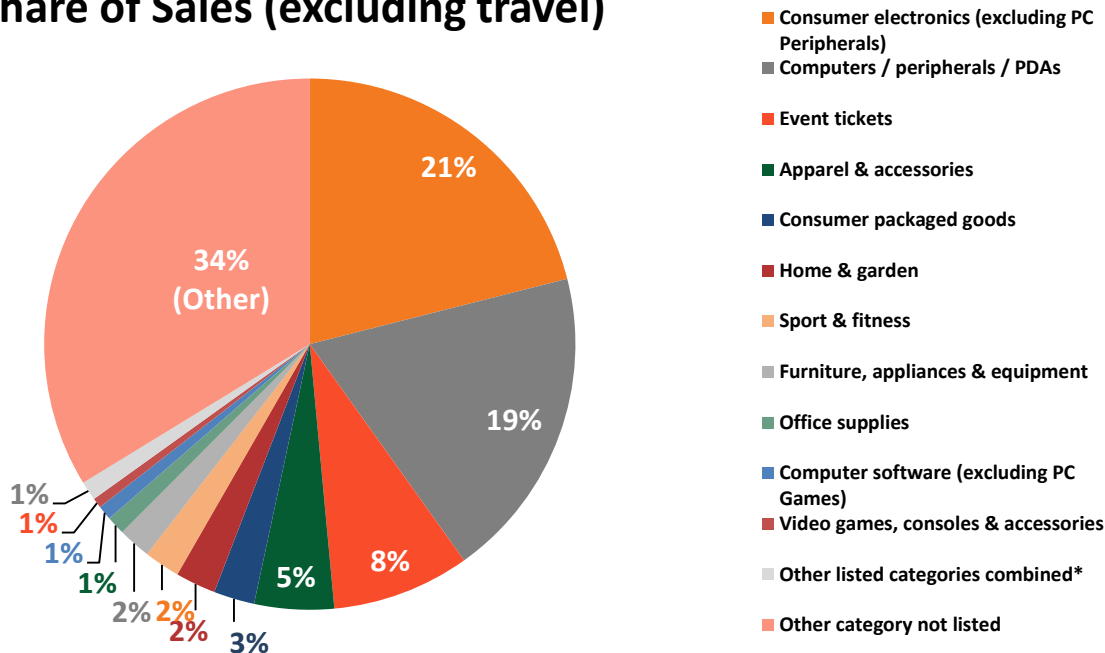
Consumer electronics and computers / peripherals / PDAs represented 40% of the share, and other categories not listed represents a third of the share of online sales in the first quarter of 2015.

Share of Sales (excluding travel)

% MXN Sales Q1 2015 Retailers



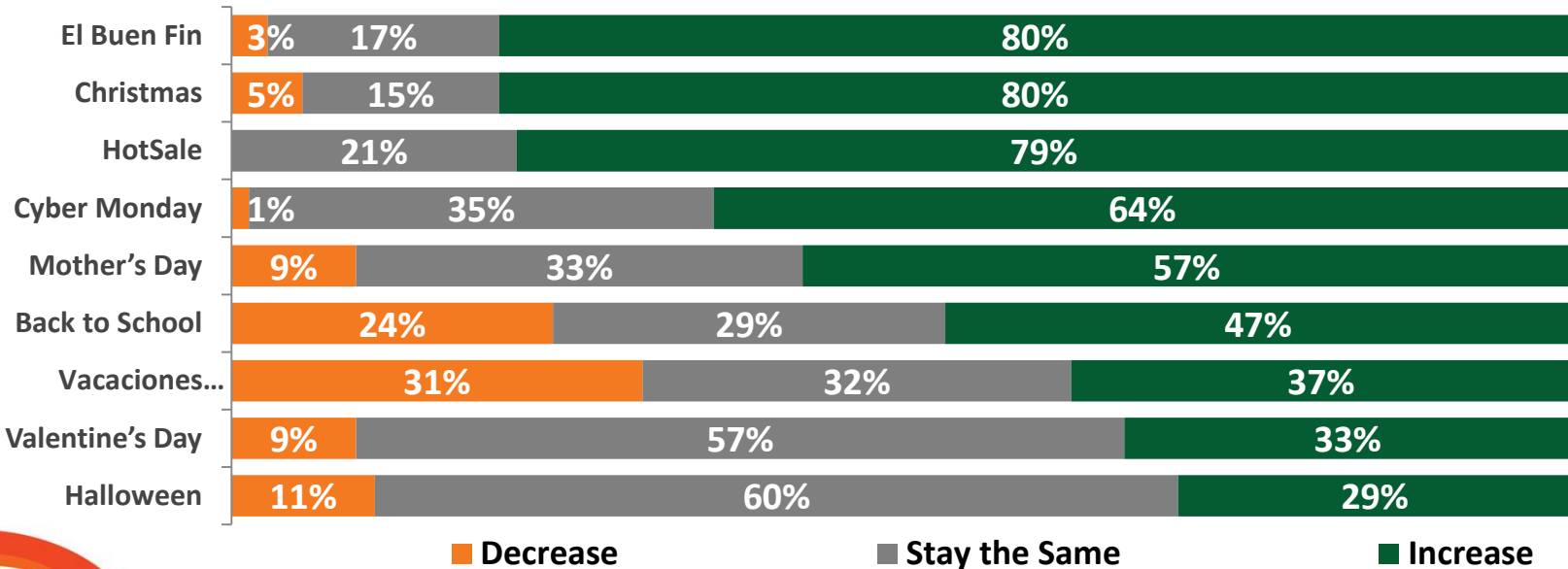
If Travel were included, it would represent 61% of the sales dollars even though only 13% of retailers sell travel.



Q3. Please take a close look at the table below. Under each category, enter the amount of money in pesos you have sold online in the first 3 months of the year, January 2015 – March 2015. Please list the amount spent from domestic (in Mexico) vs. International (all other countries) in separate columns.
 Base: All retailers (n=75) | Note: Domestic and International sales are shown together.
 * Includes the following categories: books, magazines (physical copies only), digital downloads, flowers, greetings & misc. gifts, General services, Jewelry & Watches, music, movies & videos (physical copies only), and toys and hobbies

Retailers expect sales to increase the most around El Buen Fin, Christmas and HotSale.

Expected Change in Sales by Holiday



Net Change:
77%
75%
79%
63%
48%
23%
6%
24%
19%

Q4. Comparing your typical sales volume with your sales volume around holidays, how did/do you expect your sales to change around each of these holiday periods in 2015?
Base: All retailers (n=75)



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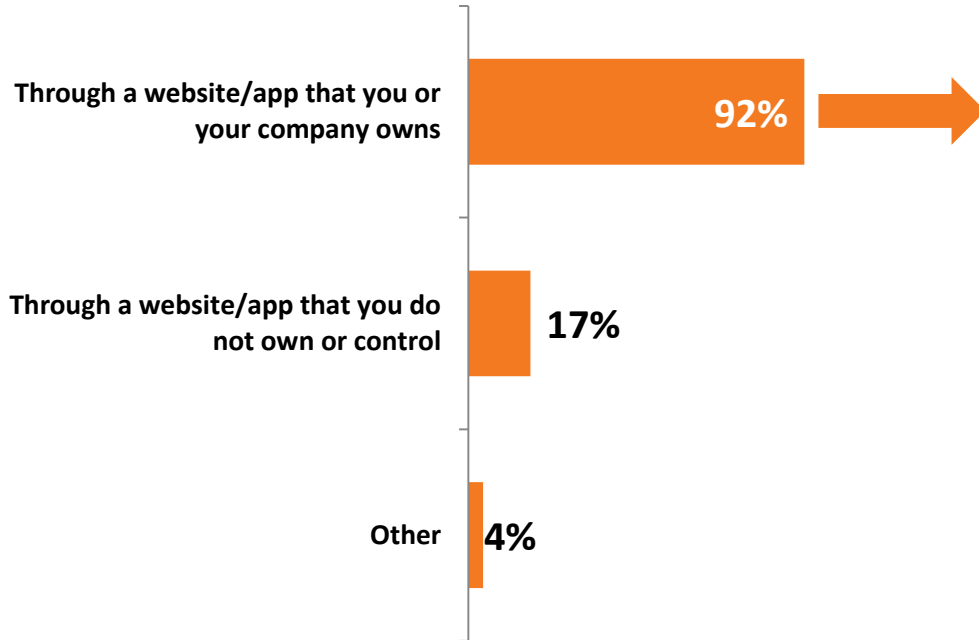
Website Features

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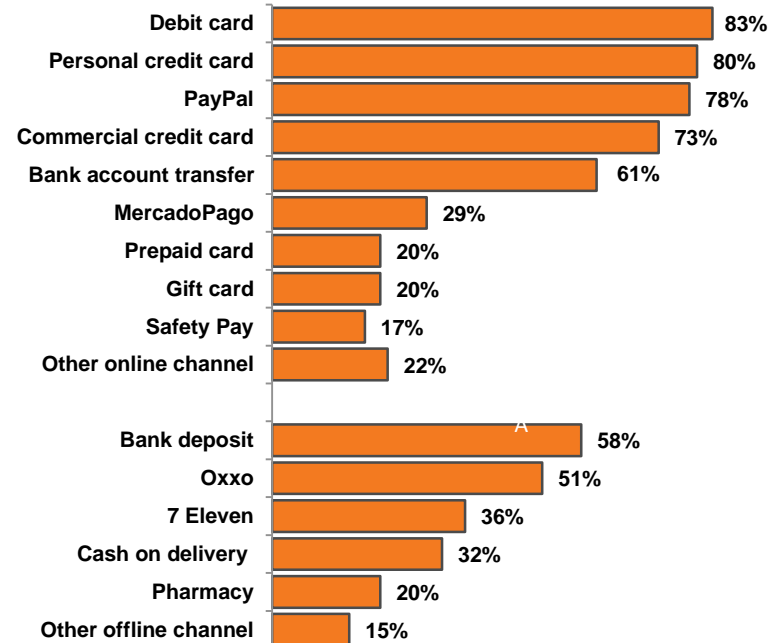


Most retailers control their own online storefront. Debit/credit cards and PayPal are the most accepted types of payment.

Type of Online Storefront



Payment Types Accepted Online



Q5. How do you sell your products/services online? | Base: All retailers (n=75)
 Q5A. Which payment types/channels do you offer/accept for the online purchases on your website?
 Base: Retailers who own their own online storefront (n=69)

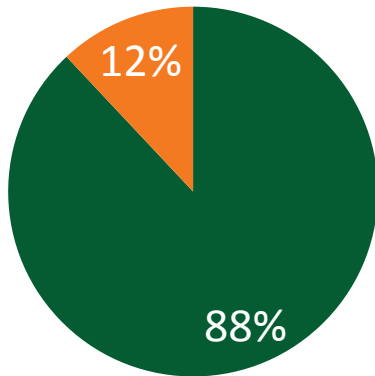


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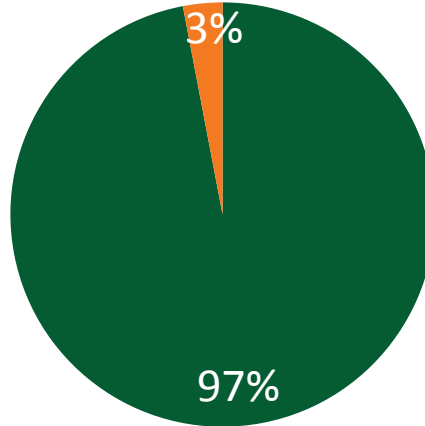


Almost nine in ten retailers are aware of the AMIPCI Trustmark, and almost all retailers are aware of the HotSale and El Buen Fin sales events.

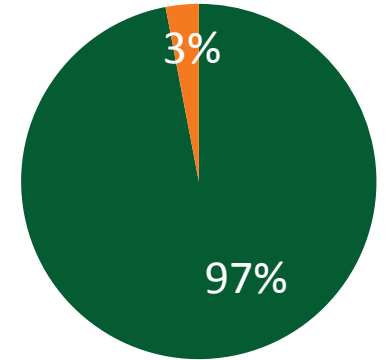
Awareness of AMIPCI Trustmark



Awareness of Mexico's HotSale event



Awareness of El Buen Fin event



■ Aware ■ Not Aware

Q6A. Are you aware of the AMIPCI Trustmark?
Q6B. Are you aware of Mexico's HotSale online sales event?
Q6C. Are you aware of El Buen Fin online sales event?
Base: All retailers (n=75)

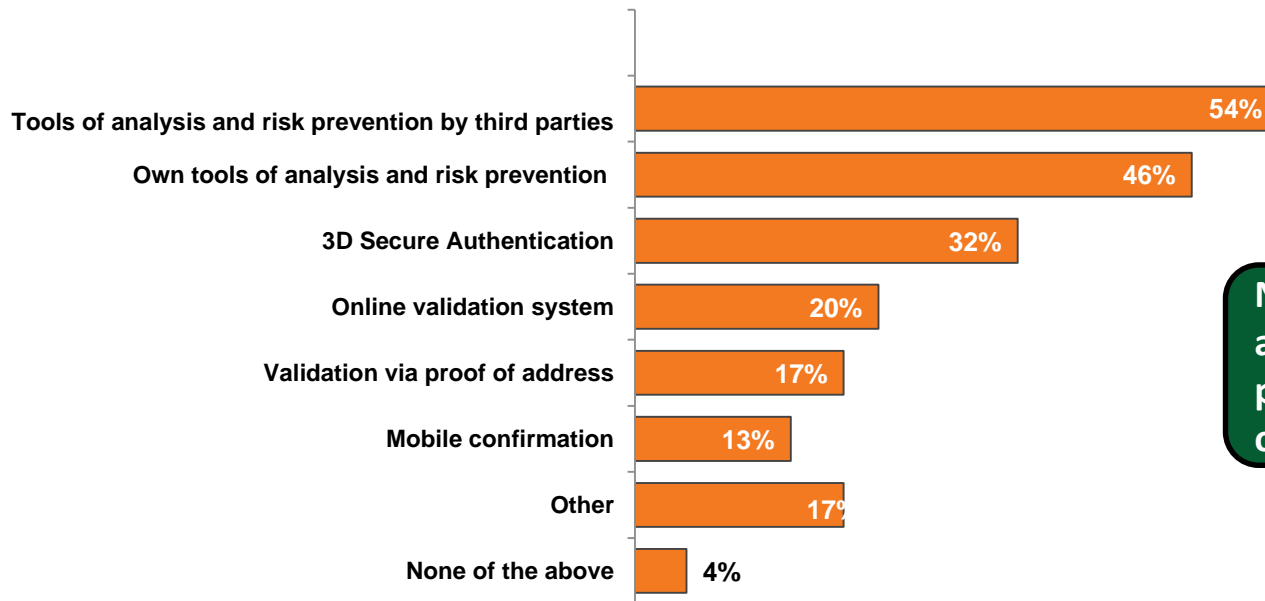


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Seven in ten have some type of risk analysis/prevention tool or service.

Controls and security features on the website

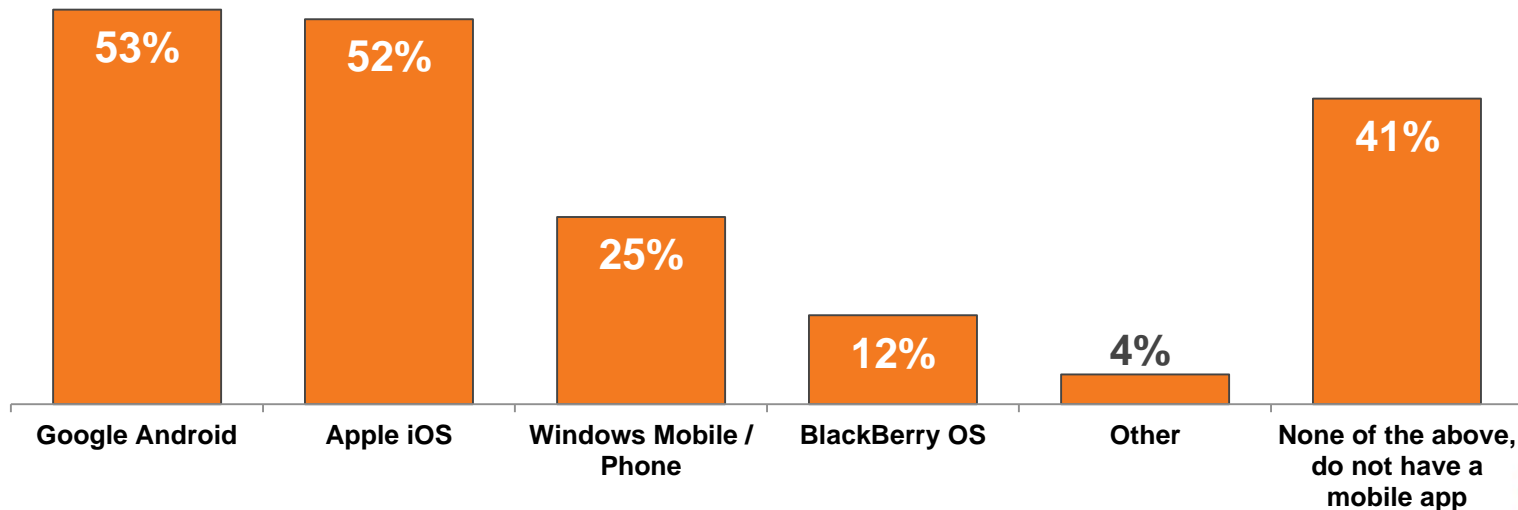


Net: Have a risk analysis/prevention tool or service: 71%

Q8. Which of the following controls and/security features do you utilize on your website?
Base: Retailers who own their own online storefront (n=69)

Three in five retailers have a mobile app, with most being supported by both Android and Apple iOS.

Operating systems for which the business has a mobile app



Q10. Does your business have a mobile app for any of the following operating systems?
Base: All retailers (n=75)



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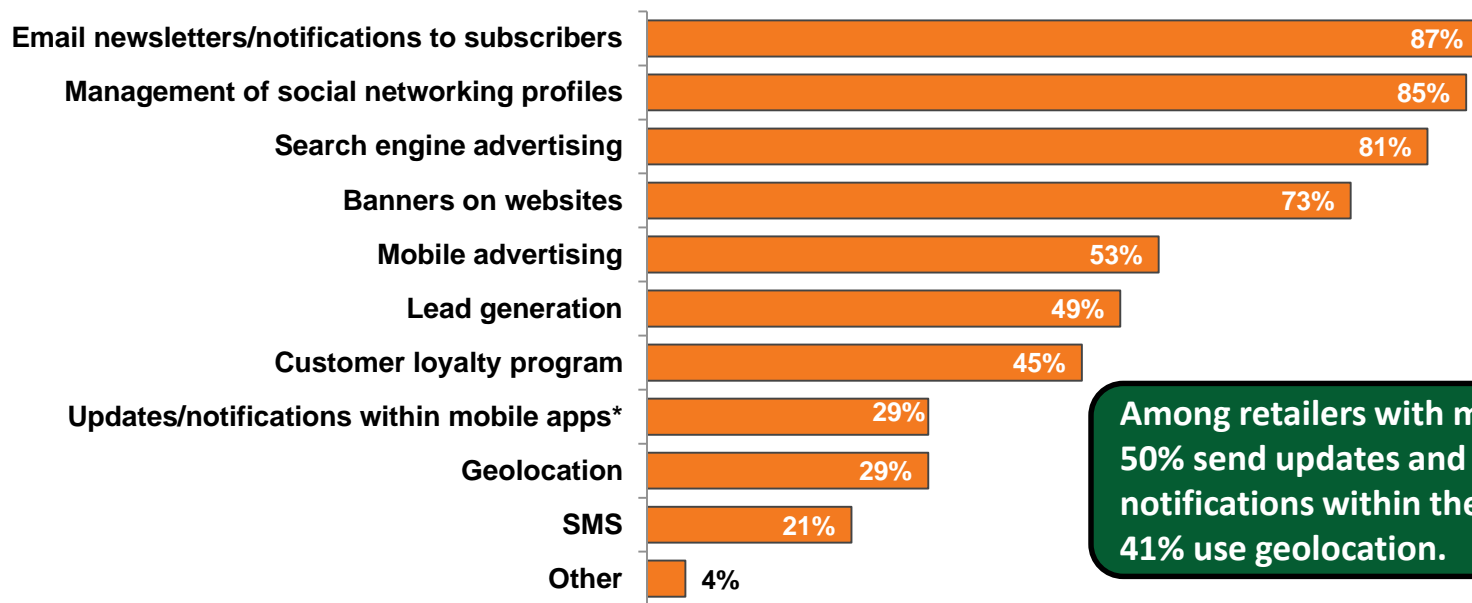
Digital Marketing and Promotions

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These retailers have several active marketing strategies, including newsletters, Social Media and search engines advertising (banners, subasta de palabras, etc.).

Digital marketing activities in the past 12 months



Among retailers with mobile apps, 50% send updates and notifications within their app, and 41% use geolocation.

Q11. Which of the following digital marketing activities have you conducted in the past 12 months?

Base: All retailers (n=75)

* This option was only shown to retailers who indicated their storefront has a mobile app.



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Discounts and interest-free credit were the top sales promotions offered in the past 12 months.

Online sales promotions/deals on business website in the past 12 months



Q12. Have you conducted or offered any of the following online sales promotions/deals on your website or app in the past 12 months?

Base: All retailers (n=75)

Note: Sample size for this question for International sales promotions/deals is too small to report.



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Executive Summary

Online sales:

- The majority of online sales are from within Mexico, and three in four online sales are via a PC. Retailers report an average of five percent chargebacks. The top four categories sold online are apparel, sports, other categories not listed and consumer electronics.
 - The large number of incidences in "not listed other categories", indicates the diversification of the ecommerce offers.
- By sales value, excluding travel, the top four categories are other categories not listed, consumer electronics, computers / peripherals / PDAs, and event tickets.
- Retailers expect shopping to increase around El Buen Fin, Christmas and HotSale.
- Almost nine in ten retailers are aware of the AMIPCI Trust Mark, but only two in five offer the Trust Mark on their site. Almost all retailers are aware of El Buen Fin and HotSale events.



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Thank you!



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