Czech Republic B2C E-Commerce Report 2012

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Czech Republic B2C E-Commerce Report 2012

Key Findings

Covering Trends, Sales, Shares, Products, Users/Shoppers and Players

• The share of Internet users on the total population in the Czech Republic exceeded 60% in 2011, while nearly a third of consumers shopped online.

• The use of smartphones was growing in the Czech Republic in 2011, with mobile shopping being one of the most popular activities among smartphone owners.

• B2C E-Commerce sales in the Czech Republic increased less in 2011 compared to previous years.

• Following a decrease from 2010 to 2011, which was based on the fact that consumers in the Czech Republic had already purchased many expensive products online and increasingly ordered cheaper goods, average per capita online spending in the Czech Republic was expected to grow by a low single digit percentage in 2012.

• In 2011, Alza.cz was the leading B2C E-Commerce player in the Czech Republic in terms of online sales, followed by Mall.cz and Kasa.cz.

Company and Product Information

About our Reports

Market reports by yStats.com inform top managers about recent market trends and assist with strategic company decisions

A list of advantages

• yStats.com provides secondary market research: By using various sources of information we ensure maximum objectivity for all obtained data. As a result companies get a precise and unbiased impression of the market situation.

• The analyses, statistical reports and forecasts are only based on reliable sources including national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries and news portals.

• Our international employees research and filter all sources and translate relevant information into English. This ensures that the content of the original studies is correctly interpreted.

• yStats.com delivers all research results as PowerPoint files. All data can therefore be used directly for board presentations or be individually adapted.

• If required, yStats.com provides in-depth analysis for all research projects. Simply send us a request.

About yStats.com

• yStats.com has been committed to research up-to-date, objective and demand-based data on markets and competitors from various industries since 2005.

• Headquartered in Hamburg, Germany, the firm has a strong international focus and is specialized in secondary market research.

• In addition to reports on markets and competitors, yStats.com also carries out client-specific research.

• Clients include leading global enterprises from various industries including B2C E-Commerce, electronic payment systems, mail order and direct marketing, logistics as well as banking and consulting.
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“Good Product Information” was essential to 66% of online shoppers in the Czech Republic when choosing an online shop in August 2012.

Essential and important Factors influencing the Choice of Online Shop in the Czech Republic, in % of Online Shoppers, August 2012

<table>
<thead>
<tr>
<th>Factor</th>
<th>Important</th>
<th>Essential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good Product Information</td>
<td>66%</td>
<td>51%</td>
</tr>
<tr>
<td>Availability of Goods in the Warehouse</td>
<td>52%</td>
<td>40%</td>
</tr>
<tr>
<td>Photos of the Goods</td>
<td>40%</td>
<td>33%</td>
</tr>
<tr>
<td>Free Shipping</td>
<td>35%</td>
<td>33%</td>
</tr>
<tr>
<td>Search by Parameters (Filters)</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Recommendations from known People</td>
<td>32%</td>
<td>30%</td>
</tr>
<tr>
<td>Wide Range of Goods</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Comparison Parameters for the Product</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Customer Ratings and Comments</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Broad Payment Options</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Physical Location</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Certified E-Shop</td>
<td>22%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: APEK, August 2012

In March 2012, Alza.cz, the largest online shop in the Czech Republic, launched a mobile version of its online shop at m.alza.cz.

Rank 1 (ranked by B2C E-Commerce Sales): Alza.cz

<table>
<thead>
<tr>
<th>Name of Company</th>
<th>Alza.cz a.s.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Headquarters</td>
<td>Prague, Czech Republic</td>
</tr>
<tr>
<td>Major Online Shop</td>
<td><a href="http://www.alza.cz">www.alza.cz</a></td>
</tr>
<tr>
<td>Company Type</td>
<td>Internet Pure Player</td>
</tr>
<tr>
<td>Product Range</td>
<td>Consumer Electronics, Household Goods</td>
</tr>
<tr>
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<td>In 2011, B2C E-Commerce sales of CZK 6.8 billion were generated by Alza.cz.</td>
</tr>
<tr>
<td>Year Ended</td>
<td>December 31</td>
</tr>
</tbody>
</table>

News (E-Commerce)

- In March 2012, Alza.cz launched its mobile online shop, which can be found at m.alza.cz.
- Alza.cz was able to increase its turnover from CZK 5.6 billion in 2010 to CZK 6.8 billion in 2011. This growth was partly based on the availability of goods and operation of specialized online shops.
- In 2011, Alza.cz launched a new highly automated logistics center, increasing its storage capacity by 100%. The innovation required CZK 50 million of investment, with related expenses planned for 2012.
- Increased storage capacity of the new logistics center allowed Alza.cz to add a new product category to its product range. It started selling white goods in 2011 and designed a strategy to increase its market share in this segment in 2012.
- With the new technology, Alza.cz is able to process up to 20,000 requests within 24 hours.

Source: Company homepages, business reports, business and company databases, journals, company registries, news portals, industry and trade associations.
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State/Province
Country
Post Code/ZIP

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Signature

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☐ Google Adwords/Online Advertising
☐ Article in Trade Journal
☐ Press Release
☐ Social Media
☐ Recommendation
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1) Site Licenses, allowing all users within a given geographical location of an organization to access the report, are available for double the price.
2) Global Site Licenses, allowing all worldwide users of an organization to access the report, are available for triple the price.

EU Companies must supply VAT No
Purchase Order No (If required)
Order Date

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1. SCOPE

1.1 The following terms and conditions apply to our entire contract (the “Contract”) between yStats.com GmbH & Co. Kg (hereinafter also referred to as “we” or “us”) and our customers regarding the purchase of reports, and (ii) any other contract between us and our customers executed by reference to these terms and conditions (any reports and other services and products which we may make available to the customer under a Contract hereinafter the “Products”).

1.2 Any offers and conditions are hereby expressly rejected. Agreements contrary to these terms and conditions require our written confirmation. In case of deviations between these terms and conditions and the contents of the Order Forms, the contents of the Order Form shall prevail.

2. OFFERS, ORDERS

2.1 With respect to research services, we usually submit an offer to the customer in the form of a “Research Order Form” accompanied by a proposal stating the nature of the issue to be researched, the services to be rendered, the time required for the study and the fee due.

2.2 With respect to the purchase of reports, we usually submit an offer to the customer in the form of a “Report Order Form” accompanied by product brochure stating the contents of the report and the fee due. In this respect, our customers may chose between two types of Products, namely (i) our Product “Market Reports” and (ii) our Product “Full Access Global E-Commerce Reports”.

2.3 If a customer orders our Product “Market Reports”, the customers gets access to the ordered report as identified in the Report Order Form and the customer may use that report in accordance with Section 4.3 below and the other provisions of the Contract.

2.4 If a customer orders our Product “Full Access Global E-Commerce Reports”, the customer gets access to any standard reports (for the avoidance of doubt excluding reports published in connection with any research services) focussed on the “Internet & E-Commerce” industry as generally published by us during the twelve (12) months prior to the execution of the Contract and during the subscription term as identified in the “Report Order Form” as of the date of the execution of the Contract (i.e., one, two or three years), and the customer may use those reports in accordance with a "Global Site License" in accordance with Section 4.3 below and the other provisions of the Contract.

2.5 Unless expressly agreed otherwise in writing, the contents of our offers may not be made available in whole or in part to any third party outside the organization of the customer without our prior written consent.

2.6 Our offers are not binding and subject to change without notice until acceptance by the customer (or our representative) procuring for the customer and the submission of the Order Form to us via facsimile or email with attachment. We will provide the customer with the access data required to access the ordered Product(s) with (two) 2 days as of the execution of the Contract.

3. TERMS OF PAYMENT

3.1 The contractually negotiated prices are to be derived exclusively from the Order Form and/or the documents referenced therein.

3.2 All prices are net and without transportation costs, if applicable. Value Added Tax, if applicable, is to be paid in addition to all other charges.

3.3 We may demand an additional fee for services that go beyond the scope as agreed under the Order Form and in cases such additional Products are requested by the customer.

3.4 We will send our invoice to the customer upon execution of the Contract, unless agreed otherwise in the Order Form. In the event that the customer orders our Product “Full Access Global E-Commerce Reports”, we will send our invoice for the first contract year upon execution of the Contract (i.e.,) only (a) for any subsequent contract year(s), if any, upon commencement of any subsequent contract year.

3.5 All payments shall be due and payable within thirty (30) days following the date of our invoice without any deductions. The customer will be in default one day after the expiry date without any further warning notice being required.

3.6 All customers’ rights of retention or set-off are hereby excluded to the extent that they are not based on the same contractual relationship. Retentions or set-offs are allowed only if the customer’s claim is undisputed or has become enforceable.

3.7 In the event of a customer’s default in payment or other apparent credit unworthiness, all remaining claims against that customer shall become immediately due and payable in full. We shall be entitled to cancel and payment terms previously agreed upon and to demand payment in advance or other appropriate security with respect to pending deliveries. A customer shall be deemed unworthy of credit in particular when he files a petition for bankruptcy or composition proceedings.

4. INTELLECTUAL PROPERTY RIGHTS AND INDEMNITIES

4.1 All copyrights and other intellectual property rights in connection with our Products remain with us. All data carriers remain our property. The customer may not modify, publish, transmit, transfer or sell, reproduce, create derivative works from, distribute, perform, display, or in any way exploit any of the Products made available by us, in whole or in part, except as expressly permitted under the Contract.

4.2 Upon delivery of the Products to the customer and payment of the agreed fee, the customer obtains a non-exclusive, non-transferable, perpetual, worldwide right to use the Products provided to the customer for the contractual purposes or any additional purposes set out in the Order Form. A right to resell our Products requires our prior written approval.

4.3 In the event that the parties agree on a “Single User License” under the Order Form, this means that all users within a given geographical location (as specified in the Order Form) of an organization shall be entitled to access the report. In the event that the parties agree on a “Global Site License”, this means that all worldwide users of an organization shall be entitled to access the report. In both cases, the term “organization” refers to the company of the specific customer only and excludes any third parties including affiliates.

4.4 We must expressly be named as the author of any data the customer processes further in contractually negotiated reports.

5. TECHNICAL INFORMATION

5.1 We shall provide our Products in standardized data formats.

5.2 The customer must ensure that he has the corresponding technical resources to make use of these data, the customer does not derive any claims in connection on grounds of breach of obligation.

6. DEFECTS AS TO QUALITY

6.1 No claims for defects as to quality are triggered by insignificant discrepancies between our products and services and the warranted quality or fitness for use.

6.2 Likewise, no claims for defects as to quality may be derived from entrepreneurial risks – e.g., with regard to questions of entrepreneurial discretion, an erroneous assessment of the market situation or the failure to recognize a business action’s merit.

6.3 Defect-based claims are further excluded in cases of excessive or improper use or in connection with images caused by the customer’s negligence not reflected in the Order Form. This is also true in cases of subsequent changes made by the customers or third parties unless such changes do not affect the analysis and removal of a given defect.

6.4 Claims for defects as to quality in connection with the commencement of the legal statute of limitation. This limitation does not apply to the extent that applicable law stipulates a longer period in cases of intentional or gross negligent breaches of duty on the part of us, fraudulent concealment of a defect and injuries to life, body and health.

6.5 Claims for damages and the reimbursement of expenditures are further subject to Section 8.

7. LEGAL DEFECTS

7.1 We are liable for products and services infringing on third-party rights only if and to the extent that our products and services are used in accordance with the agreed contractual requirements.

7.2 Unless agreed otherwise, our liability for the infringement on third-party rights is limited to the territory of the European Union and the European Economic Area as well as the place of its services’ proper use as agreed under the applicable Order Form.

7.3 In the event that a third party asserts claims against the customer, alleging that a service performed by us violates its rights, the customer shall promptly notify us. If a service rendered by us violates third party rights, we shall choose one of the below actions, duly taking into consideration the customer’s interests:

(a) procuring for the customer the right to use the service;
(b) revising the service to render it free of legal violations; or
(c) withdrawing the service and refunding to the customer any related compensation paid, as justified by an adequate user fee, if we cannot effect another remedy at a reasonable expense.

7.4 Upon our request, the Customer shall assist us with the defense against claims according to this section 7, with us reimbursing the Customer for any expenditures and costs incurred as a result, although each of the Parties bears the costs of the use of its own personnel.

7.5 Claims the Customer may hold for legal defects expire in accordance with Section 6.4.

7.6 Claims for damages and the reimbursement of expenditures are further subject to Section 8.

8. LIABILITY

8.1 In cases of intentional misconduct and gross negligence, we are fully liable pursuant to applicable law.

8.2 Our liability in cases of simple negligence is limited as follows: we are liable only if and to the extent that we violated a material contractual obligation (cardinal obligation) – i.e., an obligation that (i) the Customer reasonably relied upon at execution of the applicable Order Form and (ii) was of such significance to the outcome of performance. As regards property damage and financial loss, such liability is limited to typical and foreseeable damages; in no event will we be liable for any incidental, special, punitive or consequential damages, loss of profits or loss of data in such case.

8.3 Our liability for damages under warranties (Beseichtigungsansprüchen) is limited to instances in which the warranty expressly includes such liability.

8.4 Claims for the reimbursement of expenditures and other liability claims asserted by the customer against us are subject to sections 8.1 through 8.3.

9. CONFIDENTIALITY

9.1 The Parties shall hold in strict confidence an indefinite period of time all data and information materials which they gain knowledge of as a result of a Contract, be it orally, in writing or otherwise, directly or indirectly, provided that such data or information materials are designated confidential or must be considered confidential based on their nature, and shall not use or disclose any of such data or information materials except for the purposes contractually negotiated.

9.2 Our liability in cases of simple negligence is limited as follows: we are liable only if and to the extent that we violated a material contractual obligation (cardinal obligation) – i.e., an obligation that (i) the Customer reasonably relied upon at execution of the applicable Order Form and (ii) was of such significance to the outcome of performance. As regards property damage and financial loss, such liability is limited to typical and foreseeable damages; in no event will we be liable for any incidental, special, punitive or consequential damages, loss of profits or loss of data in such case.

9.3 The Customer as a reference for as long as no contractual details are divulged.

10. PLACE OF PAYMENT

10.1 Place of payment is Hamburg, Germany.

10.2 All disputes arising from or in connection with any Contract between the parties shall be resolved through the courts of Hamburg. Governing law is German law.