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# GLOBAL CLOTHING B2C E-COMMERCE MARKET 2018

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## ABOUT YSTATS.COM

- Founded in 2005 and headquartered in Hamburg, Germany, yStats.com is one of the world's leading secondary market research companies.
- We are committed to providing the most up-to-date and objective data on Global B2C E-Commerce and Online Payment markets to sector-leading companies worldwide.
- Our multilingual staff researches, gathers, filters and translates information from thousands of reputable sources to synthesize accurate and timely reports in our areas of expertise, covering more than 100 countries and all global regions.
- Our market reports focus predominantly on online retail and payments, but also cover a broad range of related topics including M-Commerce, Cross-Border E-Commerce, E-Commerce Delivery, Online Gaming and many others.
- Given our numerous citations in leading media sources and journals worldwide, including Forbes and the Wall Street Journal, we are considered one of the most highly-reputed international secondary market research companies with an expertise in the areas of B2C E-Commerce and Online Payment.

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# GLOBAL CLOTHING B2C E-COMMERCE MARKET 2018

## GENERAL INFORMATION

## PRODUCT DETAILS

| | |
|---|---|
| Title: | Global Clothing B2C E-Commerce Market 2018 |
| Type of Product: | Report |
| Category: | Online Clothing, B2C E-Commerce |
| Covered Regions: | Asia-Pacific, Europe, North America, Latin America, Middle East & Africa |
| Covered Countries: | Japan, South Korea, Australia, China, India, Indonesia, Thailand, Vietnam, Malaysia, USA, Canada, UK, Germany, France, Italy, Netherlands, Spain, Belgium, Sweden, Switzerland, Denmark, Finland, Austria, Russia, Poland, Turkey, Portugal, Czech Republic, Ukraine, Brazil, Argentina, Mexico, Columbia, UAE, Saudi Arabia, South Africa, Egypt, Morocco |
| Language: | English |
| Formats: | PDF & PowerPoint |
| Number of Charts: | 148 |

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## QUESTIONS ANSWERED IN THIS REPORT

How is the clothing B2C E-Commerce market developing around the world?
What is the B2C E-Commerce sales volume of clothing in various markets worldwide?
What is the percentage of online shoppers that purchase clothing in 30+ global markets?
What are the major trends in online shopping for clothing in the leading markets?
What sellers are the major players of the fashion E-Commerce retail in different countries?

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# GLOBAL CLOTHING B2C E-COMMERCE MARKET 2018

**KEY FINDINGS**

## THE GROWING ONLINE RETAIL FASHION MARKET ATTRACTS GLOBAL E-COMMERCE GIANTS AND STORE-BASED RETAILERS

The global fashion B2C E-Commerce market is forecasted to exceed half a trillion euros in sales by 2022, according to projections cited in yStats.com's report. In terms of online penetration of total retail sales by 2022, more than one-third of clothing, accessories, and footwear spending is expected to occur online. The growth is driven by increasing number of online fashion shoppers who look for convenience, larger product selection, lower prices, convenient payment methods, online reviews and product ratings when purchasing clothing and accessories on the Internet.

Clothing is one of the most popular product categories purchased by digital shoppers worldwide. Due to its huge population and the high fashion online shopper penetration, China is the largest online fashion retail market globally. Tmall and Taobao are the leading channels for buying apparel products in that country, the yStats.com report reveals. The USA is in second place worldwide in online sales volume of fashion products. As of summer 2018, Amazon was the preferred pure online store for purchasing fashion items among pure online players and multi-channel retailers in the USA. The UK is the European leader in online apparel, footwear and accessories retail sales, with more than a half of adults purchasing these items online in 2017.

HM.com was the most popular fashion E-Commerce website in the world in terms of the number of monthly visits. Russian-based online fashion retailer Wildberries.ru ranked second, followed by pure online players Asos.com and store-based Zara.com, in a ranking from 2018 cited in the yStats.com report. The global online clothing market competition intensifies as Amazon has demonstrated a strong interest in the global expansion of the online fashion segment in recent years. In the growing competitive environment, omnichannel strategies have become vitally important for both online and store-based retailers of apparel. In the USA, the online shopping sites of store-based retailers Walmart, Kohl's and Macy's were among top five destinations for online clothing shopping. On the other hand, European online fashion retailer Zalando began to expand an offline segment by opening several brick and mortar outlets in Germany.

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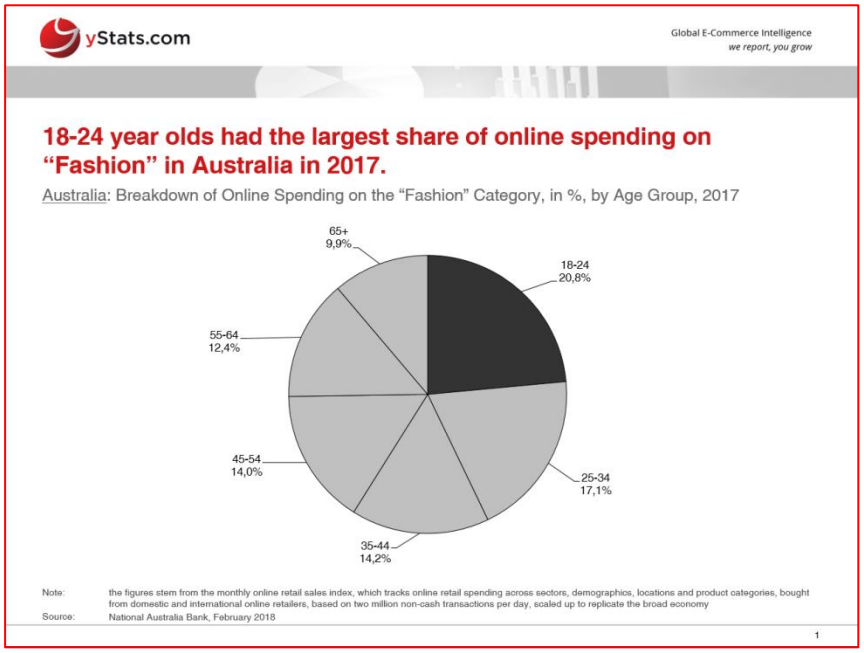


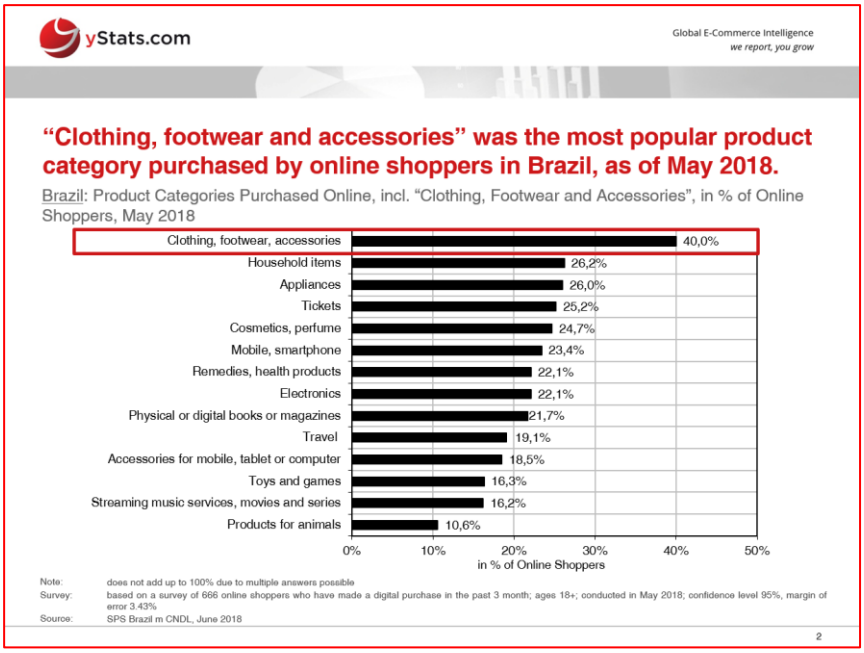

# GLOBAL CLOTHING B2C E-COMMERCE MARKET 2018
## METHODOLOGY

## GENERAL METHODOLOGY OF OUR MARKET REPORTS

**Secondary Market Research**

- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all obtained data. As a result, companies gain a precise and unbiased impression of the market situation.
- Cross referencing of data is conducted in order to ensure validity and reliability.
- The source of information and its release date are provided on every chart. It is possible that the information contained in one chart is derived from several sources. If this is the case, all sources are mentioned on the chart.
- The reports include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.

**Definitions**

- The reports take into account a broad definition of B2C E-Commerce, which might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.

**Chart Types**

- Our reports include text charts, pie charts, bar charts, rankings, line graphs and tables. Every chart contains an Action Title, which summarizes the main idea/finding of the chart and a Subtitle, which provides necessary information about the country, the topic, units or measures of currency, and the applicable time period(s) to which the data refers. With respect to rankings, it is possible that the summation of all categories amounts to more than 100%. In this case, multiple answers were possible, which is noted at the bottom of the chart.

**Report Structure**

- Reports are comprised of the following elements, in the following order: Cover page, preface, legal notice, methodology, definitions, table of contents, management summary (summarizing main information contained in each section of report) and report content (divided into sections and chapters). When available, we also include forecasts in our report content. These forecasts are not our own; they are published by reliable sources. Within Global and Regional reports, we include all major developed and emerging markets, ranked in order of importance by using evaluative criteria such as sales figures.

**Notes and Currency Values**

- If available, additional information about the data collection, for example the time of survey and number of people surveyed, is provided in the form of a note. In some cases, the note (also) contains additional information needed to fully understand the contents of the respective data.
- When providing information about amounts of money, local currencies are most often used. When referencing currency values in the Action Title, the EUR values are also provided in brackets. The conversions are always made using the average currency exchange rate for the respective time period. Should the currency figure be in the future, the average exchange rate of the past 12 months is used.

## METHODOLOGY OF OUR GLOBAL CLOTHING B2C E-COMMERCE MARKET 2018

**Report Coverage**

- This report covers the global B2C E-Commerce market for clothing. It takes into account a wide definition of the clothing segment, including products referred to as apparel, fashion, clothing, accessories and footwear. The exact definition of the segment covered on each particular chart may differ depending on the original source used. Besides sales figures, penetration and rankings, this report also reveals important market trends that affect clothing B2C E-Commerce, such as mobile, cross-border and omnichannel shopping.
- All global regions are covered in this report, including Africa, Asia-Pacific, Europe, Latin America, the Middle East and North America.

**Report Structure**

- The global chapter opens the report, including an overview of global market developments and trends.
- The rest of the report is divided by regions. The regions are presented in the order of descending total B2C E-Commerce sales. Where applicable, the countries in the regions are grouped by advanced and emerging markets.
- The countries are also presented in the order of descending total B2C E-Commerce sales.
- Within the country chapters, the following information is covered, where available: B2C E-Commerce sales of clothing, the share of online shoppers buying clothing online and the rank of this category among other product categories, the share of B2C E-Commerce on total retail sales of clothing and the share of clothing on total B2C E-Commerce sales. Not all types of information mentioned are provided for each country, due to varying data availability. For the top countries in each region, a ranking of E-Commerce websites specialized in clothing is included.
- For selected leading B2C E-Commerce markets, a text chart with qualitative overview of the online clothing market, trends and players is provided.

# GLOBAL CLOTHING B2C E-COMMERCE MARKET 2018

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| REPORT | PUBLICATION DATE | PRICE * |
|---|---|---|
| Global B2C E-Commerce 2018 | July 2018 | € 4,950 |
| Global Cross-Border B2C E-Commerce 2018 | September 2018 | € 2,950 |
| Global M-Commerce 2018 | December 2018 | € 1,450 |
| Global Consumer Electronics B2C E-Commerce Market 2018 | December 2018 | € 1,950 |
| Global Omnichannel Commerce Trends 2018 | December 2018 | € 950 |
| Global B2B E-Commerce Market 2018 | September 2018 | € 1,950 |
| Global B2B Payment Trends 2018 | October 2018 | € 950 |
| North America B2C E-Commerce Market 2018 | November 2018 | € 950 |
| Latin America B2C E-Commerce Market 2018 | November 2018 | € 1,950 |
| Europe B2C E-Commerce Market 2018 | September 2018 | € 3,950 |
| Asia-Pacific B2C E-Commerce Market 2018 | June 2018 | € 3,950 |
| Southeast Asia B2C E-Commerce Market 2018 | May 2018 | € 1,950 |
| Middle East B2C E-Commerce Market 2018 | January 2018 | € 1,950 |
| Africa B2C E-Commerce Market 2018 | March 2018 | € 1,950 |
| Global Online Payment Methods: Full Year 2017 | July 2018 | € 2,950 |
| Global Alternative Online Payment Methods: Full Year 2017 | July 2018 | € 1,950 |
| North America Online Payment Methods: Full Year 2017 | July 2018 | € 950 |
| Latin America Online Payment Methods: Full Year 2017 | July 2018 | € 950 |
| Europe Online Payment Methods: Full Year 2017 | June 2018 | € 1,950 |
| Asia-Pacific Online Payment Methods: Full Year 2017 | June 2018 | € 1,950 |
| Middle East and Africa Online Payment Methods: Full Year 2017 | July 2018 | € 950 |

## UPCOMING RELATED REPORTS

| REPORT | PUBLICATION DATE | PRICE* |
|---|---|---|
| Global B2C E-Commerce Delivery 2018 | December 2018 | € 2,450 |

* We occasionally offer a discount on selected reports as newer reports are published. Please see the most up-to-date pricing on our website www.ystats.com.
All prices exclude VAT. All above-mentioned prices reflect the value of a Single User License. Prices for Site Licenses are 1.5x the Single User License price. Prices for Global Site Licenses are 2x the Single User License price. For more information regarding our Licenses, please see our Frequently Asked Questions section of this Product Brochure or refer to our Order Form.

# CLIENTS

## QUOTES FROM OUR CLIENTS

**TRAVIS WITTEVEEN**
**CHIEF OPERATING OFFICER – MARKETS AND OPERATIONS**
**AVIRA GMBH: LEADING EUROPEAN SOFTWARE COMPANY**

"As a company that operates on a global level, the research results that yStats.com provides represent significant added benefit for us. The comprehensive analyses are executed quickly and flexibly. Furthermore, they are a reliable resource for helping us to make strategic decisions."

**STEVE ROTTER**
**VICE PRESIDENT OF MARKETING**
**BRIGHTCOVE, INC.: LEADING ONLINE VIDEO COMPANY**

"yStats.com quickly and flexibly compiles the information we require. Regardless of whether we need local or transnational data, we always get the best results from yStats.com!"

**IRIS STÖCKL**
**DIRECTOR INVESTOR AND PUBLIC RELATIONS**
**WIRECARD AG: LEADING E-BANKING COMPANY**

"The flexibility that yStats.com offers ensures that we always receive analyses, data and reports that match our needs. Fast, objective and to the point!"

**DR. MARCUS ACKERMANN**
**MEMBER OF THE EXECUTIVE BOARD**
**BONPRIX: LEADING ONLINE SHOPPING COMPANY**

"When we need the latest trends and statistics on the retail, homeshopping and e-commerce market, we turn to yStats.com. yStats.com turns the data into concise information that is objective and reliable. yStats.com delivers a cost-efficient and time saving research service for our company."

## SELECTED CLIENTS

### INTERNET

- Google
- Amazon
- eBay
- Skype
- Newegg
- Avira
- Digital River
- First Data
- Deutsche Telekom
- 1&1
- Brightcove

### FINANCE

- Goldman Sachs
- Credit Suisse
- Bank of America Merrill Lynch
- Citigroup
- Oppenheimer & Co.
- Morgan Stanley

### CONSULTING

- Boston Consulting Group
- Deloitte
- Bain & Company
- Accenture

### RETAIL

- OTTO Group
- Amway
- Costco
- Tchibo Direct
- Diesel

### OTHER

- Nintendo
- Bwin
- Lego
- Redbull
- BASF
- Beiersdorf

# FREQUENTLY ASKED QUESTIONS

## ABOUT US

### Why use yStats.com?

yStats.com can be your provider of the most current B2C E-Commerce data. Whether you seek country-specific, topic-specific, regional or global information, we ensure through secondary market research maximum objectivity for all data obtained. With our boardroom-ready PowerPoint presentations you save time and money.

### What are the benefits of secondary market research?

Secondary research is a not only a cost-effective alternative to conducting primary research studies, but it is also a time-efficient solution. Our researchers derive information and data from a variety of reliable published sources and compile the data into understandable and easy-to-use formats

### Does yStats.com provide consulting services?

No, we do not provide consulting services in any form.

## OUR PRODUCTS

### What types of Products does yStats.com offer?

yStats.com offers individual market reports and full access subscriptions (varying in license types and duration) to current and future published reports. The currently available reports can be found in the Market Reports section of our website. The list of soon-to-be-published reports can be found in the Upcoming Reports Section on our homepage. For a more extensive list of upcoming reports, please contact us directly. For more information about our Full Access subscription, please see the Full Access page on our website. Apart from market reports and subscription, yStats.com also offers custom research services.

### What is your research methodology?

Our reports are exclusively based on secondary market research. Our researchers derive information and data from a variety of previously published, reliable sources and compile the data into understandable and easy-to-use formats.

### From which sources is information for reports derived?

Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all data obtained.

### Is information in the reports comparable across countries?

Due to the fact that information included in the market reports is derived from different sources which might rely on different definitions, some information might not be comparable across countries.

### What are the report format options?

Our reports are published in PDF and PowerPoint formats. PowerPoints are ready-to-use for boardroom presentations, but also easily editable to suit your business needs!

### Does yStats.com offer reports in other languages?

All of our reports are published in English at this time.

### How can I find the most relevant report?

On our website, you can use various search features or search by keyword. You can also contact us directly describing your research needs and we will help you find the appropriate report that satisfies them.

### How do I know which license to choose when purchasing individual reports?

When purchasing a report, you must select the appropriate license.
A Single User License: allows one user to access the downloaded report.
A Site License: allows up to ten (10) users of a company within a specified geographic area (i.e. country) to access the downloaded report.
A Global Site License: allows up to ten (10) users of a company worldwide to access the downloaded report. Please choose the appropriate license with care, as all purchases are subject to our Terms & Conditions.

### Can I purchase only selected parts of a report?

Unfortunately, our market reports are only sold as a whole.

### Is there an overlap between country, regional and global reports on the same topic?

Some reports can have overlapping content, such as regional reports containing content from parts of individual country reports. Please consult the Table of Contents or contact us if any questions should arise.

### I would like to see a sample of a report. Where can I find it?

Free sample charts from each report can be viewed in the product brochure. Also a standard free sample is available for download from each report page. To get an idea what our reports look like you can download a standard Free Full Report from our online shop.

For a full version of Frequently Asked Questions, please visit: https://www.ystats.com/faq-by-section/

# FREQUENTLY ASKED QUESTIONS

## OUR PRODUCTS (CONT.)

### When will an update of a particular report be published?

In general, our market reports are published on an annual basis. Online Payment reports are updated on a semiannual basis. Please consult the "Upcoming Reports" section on our homepage or "Related Reports" section of our product brochure. We have a publication schedule that we adhere to, so if you'd like to know about a specific report, please contact us.

### Do you offer subscriptions to reports?

Yes, we do have a number of subscription options called "Full Access". Some leading international enterprises subscribe to our reports to get the most comprehensive insight into B2C E-Commerce and online payment markets worldwide contained in our market reports collection and ensure cost efficiency. There are several Full Access subscription options varying in number of possible seats allocated and duration of subscription. For more information on our various Full Access Subscription offers, see our Full Access Subscription page on our website and contact us.

## OUR SERVICES

### I need more information about a particular topic. Do you offer further products or services?

Apart from market reports, we also offer Custom Research. With our Custom Research solutions, you receive research tailored to your needs, answering your specific questions. The Custom Research types include In-Depth Industry Research, Competitive Intelligence and Company Profiles, Corporate Customer Identification in international markets, Investor Snapshots and Country Fact Sheets.

### I still need help finding the right report – do you offer additional personal search?

yStats.com offers services in which our researchers who prepare the reports can point you to the appropriate report to suit your needs. If you want to take advantage of this free service, please contact us.

## ORDERING & DELIVERY

### How do I order a report?

Our reports can be purchased most easily through our Online Shop, but are also available for purchase offline. To purchase a report from our Online Shop: Choose the relevant report and appropriate license, click „Add to Cart", then complete the necessary check out steps. Payment options include major credit cards (MasterCard, Visa, American Express, Maestro, China UnionPay) or PayPal. Once your online payment has been completed, you will be able to click on „Download", which will take you to your "my yStats" account, from where your report will be available as a PDF and PPT for download.

To purchase a report via fax or email with PDF attachment:
To order a report offline, please complete and sign the "Fax Order" form, which can be located on the right-hand side of the webpage next to the report overview or in the product brochure. Send the completed and signed order form through fax or email (as a PDF attachment) as indicated on the form. An Invoice will be sent to you afterwards asking for payment via bank transfer, credit card, or PayPal. After the payment is processed successfully, you will be given the access details to the report.

### Will I get an invoice?

For online shop purchases, an invoice will be sent to you automatically via email to the email address entered in the billing details immediately after completion of payment. For offline orders, an invoice is sent per email after the complete order form is received.

### How long does delivery take?

All of our reports are delivered online. All reports ordered online via our Online Shop are available for download immediately following successful processing of payment. For all orders made offline, upon successful processing of payment, access details will be sent via email.

### Do I have to pay tax if I purchase a report?

Customers from Germany have to pay an additional tax rate of 19%. Customers from the European Union (EU) do not have to pay tax if they enter a valid VAT Identification Number. Customers from non-EU countries do not have to pay tax. Moreover, tax has to be paid for all private purchases from the EU.

### What is yStats.com's VAT number?

yStats.com's VAT number is DE 251661218

## POLICIES

### What is yStats.com's return/refund/cancellation policy?

Since our reports are information-based digital products and therefore consumed upon purchase/download, we will not refund, allow cancellation or accept any returns of orders. Please read through all information about a product before purchasing. If you should have any questions about a product, please do not hesitate to contact us via our contact details as listed on our homepage.

For a full version of Frequently Asked Questions, please visit: https://www.ystats.com/faq-by-section/

yStats.com

Global E-Commerce Intelligence
*we report, you grow*

# REPORT ORDER FORM

## PLACE YOUR ORDER OFFLINE

Scan and email this form to order@ystats.com

Fax us at + 49 40 39 90 68 51 using this form

## PLACE YOUR ORDER ONLINE

All our reports are also available for purchase online in our Online Shop.

## CHOOSE YOUR REPORT(S) AND LICENSE* TYPE(S)

Please confirm the license type and reports:

| Report Title | Publication Date | Price (€) | SINGLE USER LICENSE | SITE LICENSE | GLOBAL SITE LICENSE |
|---|---|---|---|---|---|
| | | | ☐ | ☐ | ☐ |
| | | | ☐ | ☐ | ☐ |
| | | | ☐ | ☐ | ☐ |
| | | | ☐ | ☐ | ☐ |
| | | TOTAL | | | |

## CHOOSE YOUR PAYMENT METHOD

Choose Your Preferred Payment Method:

**Credit Card** ☐

VISA ☐ MasterCard ☐

American Express ☐ China UnionPay ☐

CARD HOLDER

CARD NUMBER

EXP. DATE

SECURITY CODE**

**If you prefer, this can be communicated over the phone or via secured e-mail communication.

**Bank Transfer** ☐

Bank Transfer information will be provided to you in the invoice you receive following submission of an Order Form offline.

**PayPal** ☐

An invoice will be sent via e-mail to the e-mail address as listed in the contact details below. Payment via PayPal will be made available upon receipt of the invoice.

## COMPLETE YOUR CONTACT DETAILS

An invoice will be sent to your company

TITLE | FIRST NAME, LAST NAME | JOB TITLE

COMPANY | E-MAIL | PHONE

FAX | STREET | CITY

STATE / PROVINCE | POSTAL CODE | COUNTRY

## HOW DID YOU FIND US?

- ☐ Search Engine (Google, Bing etc.)
- ☐ Print/Online Publication
- ☐ Press Release
- ☐ Linkedin/XING
- ☐ Facebook/Twitter
- ☐ Personal Recommendation
- ☐ Other _____

## SIGNATURE

EU COMPANIES MUST SUPPLY VAT NO.

PURCHASE ORDER NO. (IF REQUIRED)

ORDER DATE

All orders are subject to the Terms & Conditions and Privacy Policy contained on our website. All reports are provided in PDF and PowerPoint formats. yStats.com may contact you in the future about receiving our free newsletter or other mailing. If you do not wish to be contacted, please advise us accordingly. Your contact information will not be sold or shared with other organizations.

* Please be advised that when purchasing a report, you have the option to choose between a Single User License (allowing one single user access to the report), a Site License (allowing up to 10 users in a particular geographic location access to the report), or a Global Site License (allowing up to 10 users of a company worldwide to access the report). Please choose the license that suits your needs best. Failure to comply with our Terms and Conditions with respect to appropriate license usage may result in legal action.

# TERMS AND CONDITIONS

yStats.com GmbH & Co. KG provides its services exclusively to contracting partners and users of its website according to Sec. 14 German Civil Code ("you") subject to the following Terms and Conditions. By visiting our website, shopping at the online store provided by yStats.com, or placing an order offline for any of our products, subscriptions and services, you acknowledge that you are bound by the following Terms and Conditions, which are, unless explicitly agreed upon otherwise in writing, the entirety of the "Contract", as defined in 1.1, between yStats.com GmbH & Co. KG and you. Terms and Conditions are subject to change at any time without prior notice, based on the discretion of yStats.com GmbH & Co. KG, the most current of which are readily available on our website.
We herewith contradict any terms and conditions of purchase by our customers which will not become part of the Contract.

## 1. SCOPE

1.1 The following terms and conditions apply to our entire contract (the "Contract") be-tween yStats.com GmbH & Co. KG (he-reinafter also referred to as "we" or "us") with our customers regarding (i) the purchase of our reports both on- and offline, (ii) custom research services, (iii) full access subscriptions, (iv) searchable online database of sta-tistics (the "Online Database") and (v) any other contracts between us and our custom-ers executed with reference to these terms and conditions (any reports and other ser-vices and products which we may make available to the customer under a Contract hereinafter the "Products").
1.2 Agreements contrary to these terms and conditions require our express written con-firmation. Deviations between these terms and conditions and the contents of the Order Form will be accepted if and only if expressly agreed upon by both our customer(s) and us in writing, limited to the case of custom research orders, at which point the contents of the Order Form shall prevail.

## 2. REPORT AND FULL-ACCESS SUBSCRIPTION OFFERS & ORDERS

2.1 With respect to the purchase of our Market Reports, purchase can be made either online or offline.
2.2 Our homepage contains information about pricing, acceptable payment methods and product brochures. To purchase a Market Report directly from our online shop, simply click 'Add to Cart', then 'Proceed to Checkout', where registration and payment details can be entered. As soon as payment is processed successfully, you will receive an Invoice via email and the Report will be available online for download.
2.3 To purchase a Market Report offline (not via the online shop) simply print the Report Order Form from the appropriate online brochure or by clicking on the Fax Order button on our webpage. Simply fill out the Report Order Form, have a duly authorized representative sign the Report Order Form and then submit the Report Order Form to us via facsimile or email with PDF-attachment. Upon receipt of a completed Report Order Form, you will obtain an Invoice detailing the product ordered, price, and date of payment. Upon successful processing of payment, access and log-in details will be forwarded to the purcha-ser within two (2) business days.
2.4 If you order our product "Market Reports", you gain access to the ordered report as identified in the Report Order Form and you may use that report in accordance with Section 6.2 below and the other provisions of the Contract.
2.5 To purchase one of our Full Access Subscriptions, please contact us through the appropriate forum on our website, located under the Full Access tab on our homepage. Once we receive an inquiry, we will forward an Order Form to be filled out and signed by a duly authorized representative. Once this Order Form has been completed and signed, please send the Order Form via facsimile or email with PDF-attachment. Upon receipt of the completed Order Form, we will send an Invoice detailing price of the "Full Access Subscription" and payment method options. Upon successful processing of payment, access and log-in details will be forwarded to the purchaser within two (2) business days. The provision of this information constitutes the acceptance should you not have been provided with a separate acceptance in writing.
2.6 If you order one of our "Full Access Subscriptions", you gain access to all reports within the scope of your chosen subscrip-tion (excluding all custom research services) currently available on our website during the subscription timeframe as identified in the "Order Form" as of the date of the execution of the Contract and you get one (1) license for one (1) specified user to access all published content on our Online Database during the subscription timeframe as identified in the "Order Form".
You may use the reports and the Online Database pursuant to your chosen license option, in accordance with Section 6 below and the other provisions of the Contract.

## 3. CUSTOM RESEARCH OFFERS & ORDERS

3.1 Unless expressly agreed upon otherwise in writing, the contents of our offers may not be made available in whole or in part to any third party outside your organization.
3.2 With respect to research services, upon inquiry, we submit an offer to you in the form of a "Research Order Form" as a PDF, accompanied with a proposal stating the nature of the issue to be researched, the services to be rendered, the time required for the study, structure of payments (if any) and the total fee due. You accept this offer by completing the Research Order Form, having a duly authorized representative sign the Research Order Form and then submitting the Research Order Form to us via facsimile or email with PDF-attachment.

## 4. ONLINE DATABASE

4.1 With respect to the access to our Online Database, your order can be made offline.
4.2 To purchase access to our online database offline (not via the online shop) simply print the Database Access Order Form from the appropriate product brochure. Simply fill out the Database Access Order Form, have a duly authorized representative sign the Database Access Order Form and then submit the Database Access Order Form to us via facsimile or email with PDF-attachment. Upon receipt of a completed Database Access Order Form, you will receive an Invoice detailing the product ordered, price, and date of payment. Upon successful processing of payment, log-in details will be forwarded to you within five (5) business days.
4.3 If you order our product "Online Database", you gain access to the ordered online database as identified in the Database Access Order Form and you may use that data-base in accordance with Section 6.7 below and the other provisions of the Contract.

## 5. TERMS OF PAYMENT

5.1 All prices for offline orders are to be derived exclusively from the Order Form and/or the documents referenced therein. All prices for orders placed via the online shop are those which are displayed on our website.
5.2 All prices are net and without transportation costs, if applicable. Value Added Tax, if applicable, at the statutory rate shall be added to all fees payable hereunder.
5.3 For all services that go beyond the scope as agreed under the Order Form, a rea-sonable additional fee for these services shall be discussed and agreed upon with the customer before commencement of any work and will be itemized on the final Invoice (if applicable) sent to the customer.
5.4 We will send our Invoice to you upon execution of the Contract, unless agreed oth-erwise in the Order Form. In the event that you order our product "Full Access Sub-scription", we will send our Invoice for the first contract year upon execution of the Con-tract. Any Invoice(s) for any subsequent contract year(s), will be sent to you upon commencement of each contract year.
5.5 All payments shall be due and payable immediately upon the date set forth in the Invoice, without any deductions.
Products will not be dispatched and services will not commence until successful processing of payment, excluding the case of custom re-search orders, in which structured payment terms will be outlined on the Order Form.
5.6 All customer's rights of retention or set-off are hereby excluded to the extent that they are not based on the same contrac-tual relationship. Retentions or set-offs are al-lowed only if the customer's claim is undisputed, has become unappeasable or is ready for decision.
5.7 In the event of a customer's default in payment or other apparent credit unworthi-ness, all remaining claims against that customer shall become immediately due and payable in full. This only applies if the customer is responsible for the default. We shall be entitled to rescind 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 petiti-on in bankruptcy or composition proceedings.

## 6. INTELLECTUAL PROPERTY RIGHTS AND INDEMNITIES

6.1 All copyrights and other intellectual property rights in connection with our products and all contents of our website remain with us. All data carriers remain our property. The customer/user may not modify, publish, transmit, transfer or sell, repro-duce, 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.
6.2 Upon delivery of the product(s) to you and payment of the agreed fee, you obtain a non-exclusive, non-transferable, per-petual right to use the products provided for your internal purposes or any additional purposes as contractually agreed upon. Our reports and our Online Database, in part or entirety, may not under any circumstances be used for external purposes without our expressed written permission. Requests are to be submitted to us and will be considered on a case-by-case basis. We retain the right to reject and deny requests. Requests that are accepted may be subject to an additional fee, negotiable between parties on a case-by-case basis.
6.3 We, as well as any original sources contained within our product, must expressly be named as the author of any data the customer processes further as contractually negotiated. Furthermore, we maintain the right to conduct a formal review of any final product(s) which contain data cited from our market reports or our Online Database. We formally require ten (10) business days prior to external publication or sharing of any product(s) that derive data from our market reports or our Online Database. We maintain the right to review and discuss citation formalities at any point in time.
6.4 For Market Report purchases, in the event that the parties agree on a "Single User License" under the Order Form, this means that only one (1) individually named user of an organization shall be entitled to access the report(s). In the event that the parties agree on a "Site License" under the Order Form, this means that up to ten (10) 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 up to ten (10) worldwide users of an organization shall be entitled to access the report. In both cases, the term "organization" refers to your specific company only and excludes any third parties, including affiliates.
6.5 For Full Access Subscription purchases, in the event that the parties agree on a "10-Seat Full Access License" under the Order Form, this means that up to ten (10) worldwide users of an organization shall be granted Full Access to the reports. In the event that the parties agree on a "15-Seat Full Access License" under the Order Form, this means that up to fifteen (15) worldwide users of an organization shall be granted Full Access to the reports. In the event that the parties agree on a "20-Seat Full Access License", this means that up to twenty (20) worldwide users of an organization shall be granted Full Access to the reports. In the event that the parties agree on an "Unlimited Seat Full Access License", this means that an unlimited number of worldwide users of an organization shall be granted Full Access to the reports. In all cases, the term "or-ganization" refers to your specific company only and excludes any third parties, includ-ing affiliates.
6.6 For the specific case of a purchase of an "Unlimited Full Access License", the fol-lowing limitations apply:
6.6.1 Our reports may be used for internal purposes, in part or in entirety, limited
only as is expressed in this Section 6 of yStats.com GmbH & Co. KG Terms & Condi-tions.
6.6.2 The sharing of our reports, in part or in entirety, via the upload to/use of a
company's intranet network is hereby allowed only with the purchase of an "Unlimited Full Access License."
6.6.3 No data from our reports may be reproduced or republished in any identical or near identical form in any of a company's final products or content used for external purposes without our expressed written permission.
6.7 Regarding the online database, you will be granted a sublicense from "Tableau Online" a software of Tableau Software, Inc. If the Online Database is made available via "Tableau Online", you may use the Online Database solely in accordance with Sec-tion 3.7 of the Tableau Software End User License agreement ("EULA"), available on the website www.tableau.com (under section legal). You confirm, that you acknowledge the EULA and agree to indemnify us from all claims of third parties, in particular Tableau Software, Inc., based on your violation of the EULA. Any sublicense granted to you to use "Tableau Online" automatically ends with the end of the term of our Contract with you and we will change the log-in details for the Tableau license purchased in order to grant a sublicense to you.

## 7. TECHNICAL INFORMATION

7.1 We shall provide our products – with the exception of the online database – in the following standardized data formats: PowerPoint and PDF. For custom research re-ports, Excel documents may also be provided, upon request.
7.2 You must ensure that you have the corresponding technical resources to make use of these data. You may not derive any claims in this connection on grounds of breach of obligation.
7.3 Upon successful processing of payment, purchases made via the online shop will be immediately available to download or the log-in details will be forwarded to you. For all offline purchases, upon successful processing of payment, you will receive the re-quested product(s) and service(s) in the aforementioned standardized data formats, and all additional data pertaining thereto or the log-in details within five (5) business days. If the Online Database is made available via "Tableau Online", you will receive the log-in details for "Tableau Online" within the aforementioned deadline.

## 8. DEFECTS AS TO QUALITY

8.1 No claims for defects as to quality are triggered by insignificant discrepancies be-tween our products and services and the warranted quality or fitness for use.
8.2 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 as-sessment of the market situation or the failure to recognize a business action's merit.
8.3 Defect-based claims are further excluded in cases of excessive or improper use or in connection with damages caused by extraordinary conditions 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.
8.4 Claims for defects as to quality expire within one year from 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 grossly negligent breaches of duty on the part of us, fraudulent concealment of a defect and injuries to life, body and health.
8.5 Claims for damages and the reimbursement of expenditures are further subject to Section 10.

## 9. LEGAL DEFECTS

9.1 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 con-tractual requirements.
9.2 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.
9.3 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; or
b) revising the service to render it free of legal violations.
9.4 Upon our request, the Customer shall assist us with the defense against third party claims according to this section 9, with each of the Parties bearing the costs of the use of its own personnel and counsel.
9.5 Claims the Customer may hold for legal defects expire in accordance with Sec-tion 8.4.
9.6 Claims for damages and the reimbursement of expenditures are further subject to Section 10.

## 10. LIABILITY

10.1 In cases of intentional misconduct and gross negligence, we are fully liable pursuant to applicable law.
10.2 Besides Section 10.1, we are not liable for any damages, especially but not limited to any incidental, special, punitive or consequential damages, loss of profits or loss of data. This limitation does not apply to any claims for damages due to damage to life, body or health in cases of simple negligence and – subject to the limitations set forth hereinafter – due to damage caused by a breach of a material contractual obligation. Material contractual obligations are obligations that (i) you reasonably relied upon at execution of the applicable Order Form and (ii) was of critical significance to the out-come of performance.
10.3 In case of a negligent breach of a material contractual obligation our liability for damages – except for damage to life, body or health – is limited to typical and at the time of the formation of this Contract foreseeable damage.
10.4 The aforementioned limitations do also apply to our liability for fault by our bodies, employees and vicarious agents as well as our bodies', employees' and vicarious agents' personal liability.
10.5 Our liability for damages under warranties (Beschaffenheitsgarantien) is limited to instances in which the warranty expressly includes such liability.
10.6 Claims for the reimbursement of expenditures and other liability claims asserted by the Customer against us are subject to sections 10.1 through 10.5.

## 11. CONFIDENTIALITY

11.1 The Parties shall hold in strict confidence for a period of 10 years of the formation of this Contract regarding all data and information materials of which they gain knowledge as part of a Contract, be it orally, in writing or otherwise, directly or indi-rectly, provided that such data or information materials are designated confidential or must be considered confidential based on their nature, and shall use them exclusively as part of the services covered by the relevant Order. This duty of confidentiality excludes data and information materials that:
a) were already known or accessible to any third party at the time of disclosure;
b) which is lawfully disclosed to you by a third party that is not subject to a confidentiali-ty obligation regarding this data or information;
c) must be disclosed by order of and to a government agency or another competent third party; and
d) must be disclosed to legal or tax advisors of the contractual customer in question for consulting purposes.
In the cases of Sections b) and c) above, the parties shall (i) promptly inform each other about a given request and prior to disclosing confidential information, and (ii) limit the disclosure of confidential information to the minimum required.
11.2 We may use your company name and logo as a reference so long as no contrac-tual details are divulged.

## 12. JURISDICTION, GOVERNING LAW, MISCELLANEOUS

12.1 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, the place of payment is Hamburg, Germany.
12.2 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, all disputes arising from or in connection with any Contract between the Parties shall exclusively be resolved through the courts of Ham-burg. Governing law is German law under exclusion of the CISG.