

Germans Shop Later Online; Found to Spend Three Times More than the French and Nearly 1.5 Times More than the U.K. this Holiday Season

comScore Networks Issues Recap of Holiday Shopping Trends for France, Germany and the U.K.

London, U.K., 18 January, 2007 – comScore Networks, a leader in measuring the digital age, today released its final report on European online holiday shopping activity in the U.K., France and Germany. According to the analysis, of the three countries studied, Germans spent the most online during the holiday period — an estimated 5.4 billion EUR from 30 October - 31 December, 2006. U.K. consumers spent an estimated 4.0 billion EUR online during the same period, and the French spent an estimated 1.9 billion EUR. This compares to an estimated 18.8 billion EUR (\$24.6 billion) spent in the U.S. during the holiday shopping period (1 November to 31 December). (Note: Online spending estimates are based on estimated purchases made at sites within comScore's retail category and exclude travel and auction sites.)

Germany's most active shopping week occurred two weeks before Christmas (11-17 December — Week 7 of the holiday shopping season), when visits to secure Web pages (where purchases can be completed) were up 78 percent versus the pre-holiday shopping period from 28 August – 29 October. The most active shopping week in both the U.K. and France was three weeks before Christmas (4-10 December — Week 6 of the holiday shopping season), with visits to secure Web pages up 69 percent in the U.K. and 90 percent in France versus the pre-holiday shopping period.

"European online retailers appear to have done well this holiday season. High broadband penetration, familiarity with browsing and buying online, and confidence in the channel have all combined to make this a record Christmas for most online retailers in Europe – and to highlight the increasing importance of the online channel for consumers and retailers," said Bob Ivins, managing director of comScore Europe. "Almost across the board, activity on the secure buying pages of online retail sites during the holidays rose 50 percent above the average level of activity prior to the holidays, indicating that European online retailers had a very merry Christmas."

TABLE 1

European Holiday Cyber Shopping Index* Visits to Secure Sections of Online Retailing Sites			
U.K., France and Germany			
Source: comScore World Metrix			
	U.K.	France	Germany
Holiday Season Shopping Periods			
Pre-Holiday Base Period Index	100	100	100
Week 1 (10/30- 11/5)	137	153	157
Week 2 (11/6-11/12)	146	162	153
Week 3 (11/13-11/19)	151	165	156
Week 4 (11/20-11/26)	165	179	163
Week 5 (11/27-12/3)	169	179	172
Week 6 (12/4-12/10)	169	190	176
Week 7 (12/11-12/17)	164	188	178
Week 8 (12/18 -12/24)	118	164	150
Week 9 (12/25 – 12/31)	98	148	114

*Defined as the change in number of visits to secure sections of retail sites compared to the pre-holiday base period, which is the average of weekly visits to secure sections of online retail sites from 28 August - 29 October. An index of 165 should be read as, "65 percent more visits to secure sections of retail sites took place, compared to the average (100) during the pre-holiday period."

French Holiday Review

Throughout the entire holiday period Groupe PPR, CDISCOUNT.com, and Amazon Sites captured nearly half of all cyber shopping activity in France. Specifically, Groupe PPR captured 27 percent of cyber shopping visits in France while CDISCOUNT.com captured 13 percent and Amazon Sites captured 8 percent. CDISCOUNT.com, in particular, saw a remarkable increase in market share versus the pre-holiday shopping period — more than doubling its pre-holiday market share of 8 percent to 18 percent at its peak during Week 8 of the holiday shopping season and increasing 124 percent overall versus the September-October baseline period.

TABLE 2

Top French Retail Sites by Share of Cyber Shopping Visits from French Users*
Holiday Period 2006: 30 October- 31 December

Total France – Home and Work Locations, Visitors Age 15+**

Source: comScore World Metrix

	French Avg. Share of Cyber Shopping Visits 30 October - 31 December	French Cyber Shopping Index during holiday period versus pre-holiday base of 100
Groupe PPR	27%	153
CDISCOUNT.COM	13%	224
Amazon Sites	8%	162
Apple Computer, Inc.	7%	116
3 Suisses	6%	146
ALAPAGE.COM	4%	185
QUELLE.FR	3%	115
Yves Rocher	2%	144
Hewlett Packard	2%	130
VirginMega.FR	1%	134

*Percentage of total shopping visits to secure sections of retail sites

** Excludes traffic from public computers such as Internet cafes or access from mobile phones or PDAs

***Not including eBay

U.K. Holiday Review

Cyber shopping visits in the U.K. were led by Argos, which captured the highest share in the category (12 percent). Amazon Sites followed with 10 percent of all cyber-shopping visits during the holiday period, and Tesco Stores captured 6 percent. Play.com emerged as a holiday-season leader by virtue of the significant market-share increase it earned (7 percent) during Week 7 of the holiday shopping season versus its pre-holiday market share average of 4 percent, increasing 112 percent overall versus the pre-holiday period.

TABLE 3

Top U.K. Retail Sites by Share of Cyber Shopping Visits from U.K. Users*

Holiday Period 2006: 30 October- 31 December

Total U.K. – Home and Work Locations, Visitors Age 15+**

Source: comScore World Metrix

	U.K. Avg. Share of Cyber Shopping Visits 30 October - 31 December	U.K. Cyber Shopping Index during holiday period versus pre-holiday base of 100
Argos	12%	205
Amazon Sites	10%	167
Tesco Stores	6%	138
Littlewoods Shop Direct Group	6%	119
Apple Computer, Inc.	5%	114
Play.com Sites	5%	212
NEXT Group	4%	123
Ticketmaster	3%	117
The Carphone Warehouse Group	2%	117
Groupe PPR	2%	162

*Percentage of total shopping visit to secure sections of retail sites

** Excludes traffic from public computers such as Internet cafes or access from mobile phones or PDAs

***Not including eBay

The German cyber-shopping category was led by Amazon Sites, which accounted for 16 percent of total German cyber shopping visits, followed by Otto Gruppe, which accounted for 10 percent, and O2Online.de, which captured 6 percent. Notably, Neckermann.de more than doubled its pre-holiday shopping share of 3 percent by garnering 8 percent of all cyber shopping visits during Week 6 and increasing 110 percent overall versus the pre-holiday period.

TABLE 4

Top German Retail Sites by Share of Cyber Shopping Visits from German Users*		
Holiday Period 2006: 30 October- 31 December		
Total Germany – Home and Work Locations, Visitors Age 15+**		
Source: comScore World Metrix		
	German Avg. Share of Cyber Shopping Visits	German Cyber Shopping Index during holiday period
	30 October - 31 December	versus pre-holiday base of 100
Amazon Sites	16%	147
Otto Gruppe	10%	131
O2ONLINE.DE	6%	126
QUELLE.DE	6%	128
Apple Computer, Inc.	5%	100
NECKERMANN.DE	5%	210
T-MOBILE.DE	3%	141
Medion Shop	2%	155
Tchibo	2%	153
WELTBILD.DE	2%	188

*Percentage of total shopping visits to secure sections of retail sites

** Excludes traffic from public computers such as Internet cafes or access from mobile phones or PDAs

***Not including eBay

About comScore World Metrix

comScore World Metrix is the first service to continuously measure and report online behaviour on a world-wide basis, providing visitation metrics and demographic characteristics for Web site audiences around the world. With active representation of countries that comprise the vast majority of the global Internet population, World Metrix provides its clients with worldwide Internet population estimates and harmonized online performance metrics based on a consistent methodology across all countries. More than 100 clients subscribe to comScore's World Metrix service, including 8 of the top 10 interactive advertising agencies.

About comScore Networks

comScore Networks is a global leader in measuring the digital age. This capability is based on a massive, global cross-section of more than 2 million consumers who have given comScore permission to confidentially capture their browsing and transaction behaviour, including online and offline purchasing. comScore panellists also participate in survey research that captures and integrates their attitudes and intentions. Through its proprietary technology, comScore measures what matters across a broad spectrum of behaviour and attitudes. comScore consultants apply this deep knowledge of customers and competitors to help clients design powerful marketing strategies and tactics that deliver superior ROI. comScore services are used by global leaders such as AOL, Microsoft, Yahoo!, Verizon, Best Buy, The Newspaper Association of America, Tribune Interactive, ESPN, Fox Sports, Nestlé, MBNA, Universal McCann, the United States Postal Service, Merck and Expedia. For more information, please visit www.comscore.com.

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