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Export Business Map

Make the Web work for Canadian exporters





Sam Sebastian
Country Manager,
Google Canada

A Growth Engine For Canada

Today, the web has become an integral part of our lives – whether we’re streaming a new playlist, sharing a photo with family, or checking in with friends. In our constantly connected world, we also rely on the web more than ever to help us shop for products and services. It helps us research, compare and purchase products not just online, but also in stores.

For Canadian businesses, the web also provides an opportunity to reach potential customers at home and customers abroad. Across the world, Internet use is increasing with more than 50% of Internet users going online daily in the vast majority of countries. Smartphones are widely used to research purchases, while consumers increasingly like to watch online videos for product information. In fact, today more than 1 in 3 global shoppers made their last apparel purchase online.

More and more, the evidence shows that not only will the Internet contribute a growing share of Canada’s economic growth, but that businesses that embrace online tools do better. In Canada, one in 10 small businesses are exporters, but many more businesses could be using the web to reach a wider pool of customers and markets. Exports enable companies to compete outside of their local markets, diversifying their risk, optimizing existing resources, and creating economies of scale to grow their businesses.

Thanks to the Internet and the emergence of new business platforms, even the smallest company can now adopt and afford technology that would have been the envy of a large corporation 15 years ago. Now, more than ever, companies of all sizes can compete in the global economy.

Getting started in export can prove challenging for many business owners. We’ve created this Export Map and compiled resources online at at g.co/exportcanada to help raise awareness of the export opportunities available to our home-grown businesses. This map is a compilation of data from the top ten export countries for Canadian businesses with seasonality calendars providing insights into the most important holidays and events in each market, as well as fundamental facts about web and mobile usage for each country. Our Export Site also offers Canadian case studies and other resources to help businesses on their export journey.

There’s a multitude of market opportunities, and the internet brings them to your doorstep. We look forward to helping you along your export journey, and can’t wait to see how you make the web work for you!

Sam Sebastian
Country Manager,
Google Canada

Narrowing Canada's export challenge, one network at a time

With a relatively small population spread over a huge landmass, Canadian companies have always had strong incentive to find new customers and markets abroad. In fact, exporting is a key driver of Canada's economy, accounting for about 60 per cent of our gross domestic product. But for a country that is so dependent on trade for its economic prosperity, only 4 per cent of Canadian companies are exporting today. This is Canada's export challenge.

Canadian companies have traditionally been major exporters of metals, ores, and forestry products. Outside of commodities however, we have also developed a strong international reputation in sectors such as auto parts, information and communications technologies, infrastructure development, aerospace and clean technologies to name a few.

So how do we get more Canadian companies selling their goods and services abroad, when many businesses don't have enough resources to learn about international opportunities? With a little help from the digital world. In fact technology is causing a significant shift in the way trade is conducted.

For SMEs in particular, digital technology is a trade enabler. Using the Internet, they can connect to opportunities that previously never have knowledge about, or access to, without months of research, travel and networking; saving these small companies precious time and money.

For example, last year Export Development Canada (EDC) partnered with Canadian Manufacturers & Exporters (CME) to launch the Enterprise Canada Network, a website that helps Canadian companies connect to businesses, technology, and research opportunities posted in the Enterprise Europe Network and other international databases. This digital platform has already helped hundreds of Canadian SMEs grow their business internationally.

To add to these digital resources, Google has published a series of 'Export Business Maps,' bringing knowledge on key business opportunities to Canadian companies hoping to grow internationally. The map contains facts and figures on 10 export markets, which are particularly interesting as target markets for Canadian exporters and exporters-to-be.

Google's export maps are a great complement to the wealth of information that EDC offers Canadian businesses on the trends,

developments, opportunities and risks at play in the global economy. The reach of Google means that more people will be able to connect the dots of Canadian trade, with greater clarity, precision, and speed, with a view to fueling a deeper conversation about how Canada can improve its trade performance. The Google Export Business Map is a great catalyst to that effect."

Along with this market intelligence, EDC provides financing and insurance solutions that help Canadian companies respond to international business opportunities, as well as financial services for international companies that buy from Canadian companies. As a profitable Crown corporation that operates on commercial principles, EDC partners with private- and public-sector financial institutions to grow Canadian trade around the world.

International trade in Canada is, and needs to be, a team sport. Google Canada joining that team will only help to grow Canada's existing 47,000 exporters and meet Canada's export challenge.



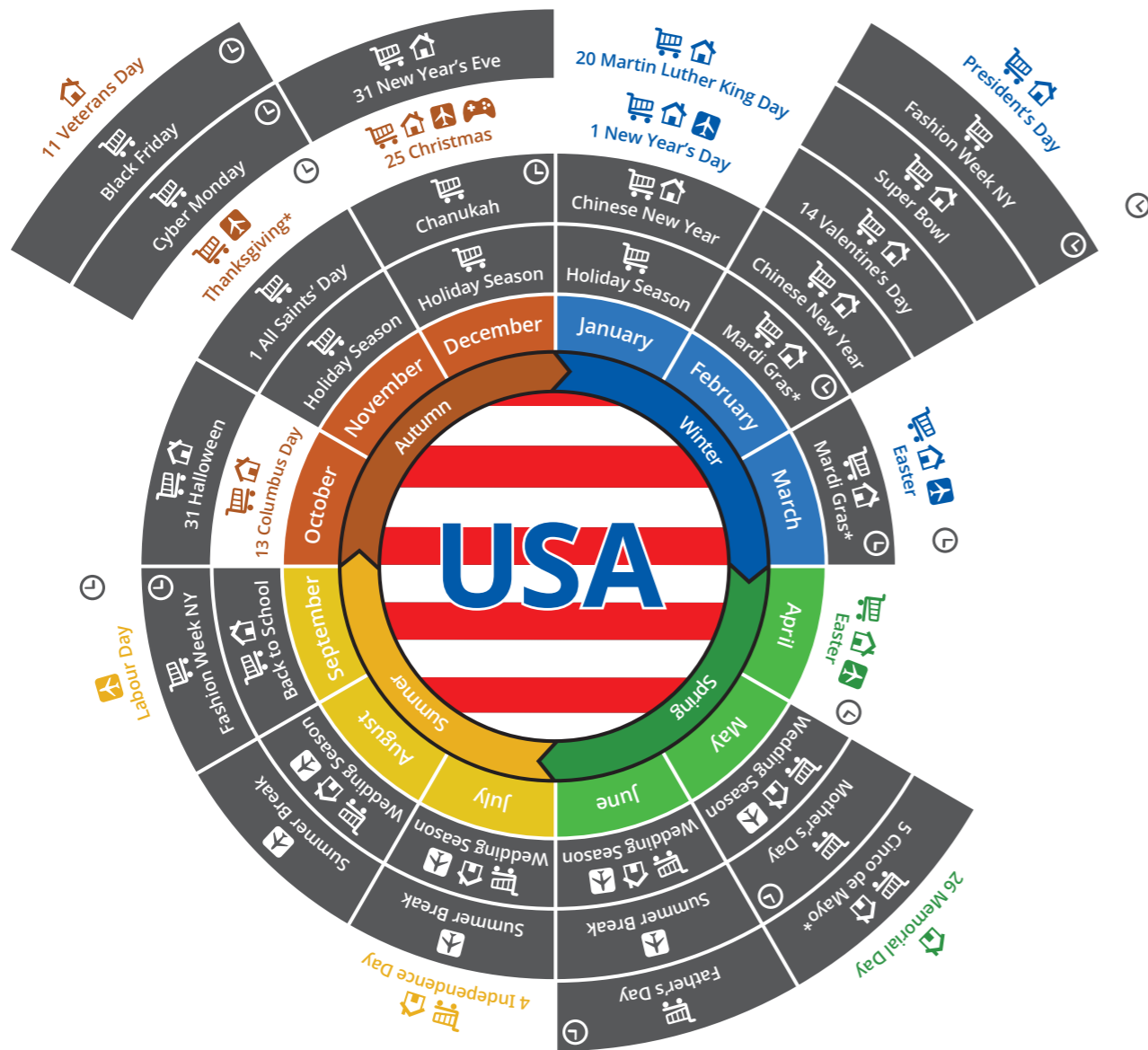
Benoit Daignault
President and CEO
Export Development
Canada

Benoit Daignault
President and CEO
Export Development Canada



SEASONALITY CALENDAR USA

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



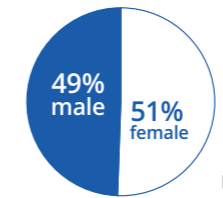
TARGETING USA EXPORTING OPPORTUNITIES

OVERVIEW

Population

318.9
million [2]

Demographic Profile



Internet Population

87%
279.83 million [8]

Online Purchase

70% [11]

SEARCH AND DISPLAY

Web research for purchases

38%
% who used search engine [3]

Frequency of internet usage

79%
daily [6]

YouTube reach

81%
of total internet audience [10]

MOBILE

Mobile penetration

114.5%
total number of mobile connections [4]

Mobile sales

21%
used smartphone to research product [7]

Use of smartphones in consumer purchases

7%
used smartphone to make purchase [10]

KEY STATS

Languages Spoken

82.1% English
10.7% Spanish
3.8% other Indo-European
2.7% Asian and Pacific island
0.7% Other

Online purchase breakdown by product

87% Fashion & apparel
82% Electronics
82% Books
74% Tickets
74% Music & games
56% Home furnishings
56% Sports & outdoors
50% Beauty products
48% Toys, kids and baby products [13]

Online activities with smartphones

52% Check email
50% Use search engines
42% Visit social networks
41% Look for product information
41% Watch online videos
34% Listen to music
33% Look up maps and directions
26% Use online banking
20% Play games
12% Purchase [14]

NOTEWORTHY FACTS [15]

American people use an average of 2.9 connected devices per person (2014).

37% of the United States population used a smartphone in 2012, globally it was 14%.

US respondents frequently research online and then buy offline, particularly in the case of TV sets and large home appliances (57%) in 2014.

*Business Industrial Markets.
*Cinco de Mayo - Celebration of Mexican heritage and pride held on the fifth of May.
*Cyber Monday - Held on the Monday immediately following Black Friday. Created by companies to persuade consumers to shop online.
*Mardi Gras - Carnival celebrations beginning on or after Epiphany and culminating on the day before Ash Wednesday.
*Thanksgiving - Holiday to give thanks for the food collected at the end of the harvest season. Held on the fourth Thursday of November.

SOURCES:

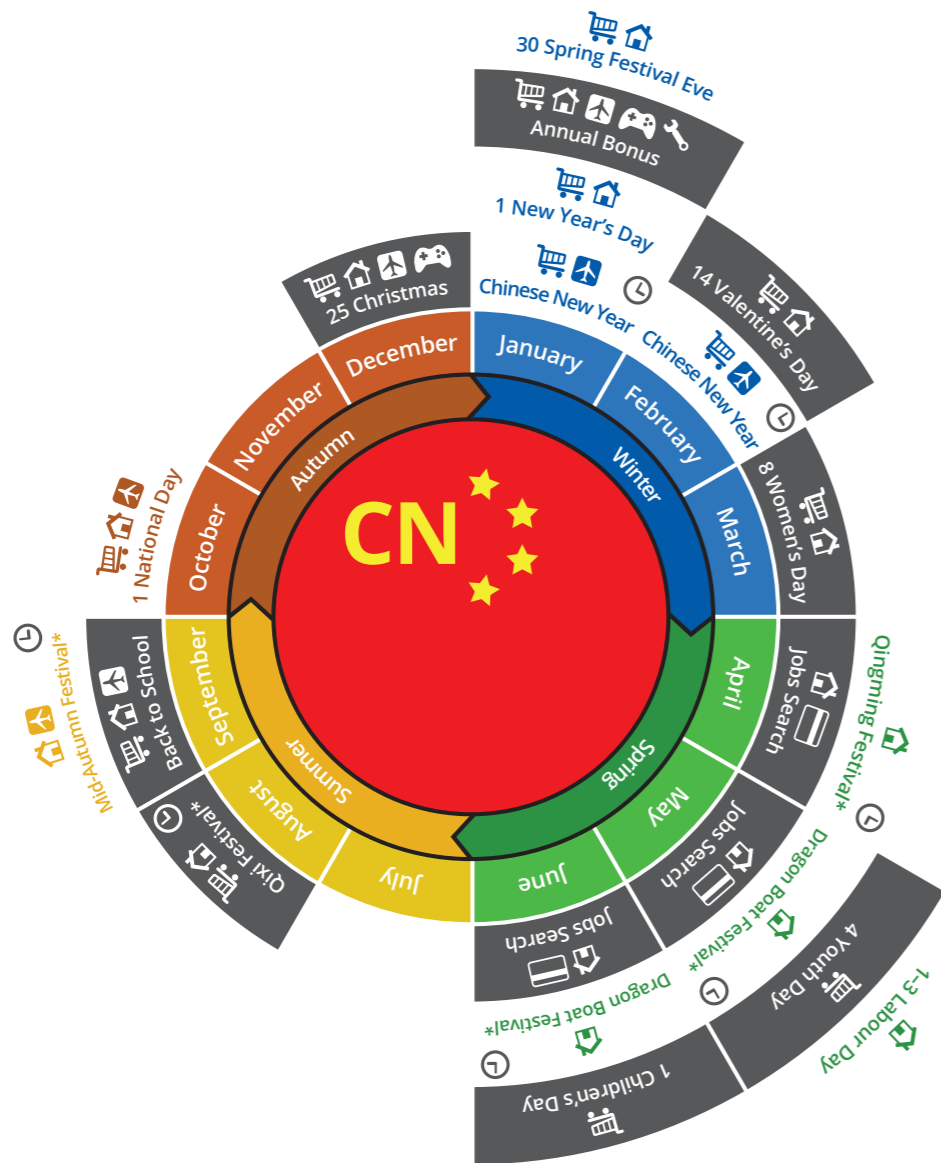
[2] CIA: The World Factbook, July 2014
[3] Consumer Barometer, 2014
[4] eMarketer, 2014
[5] CIA, The World Fact Book, 2014
[6] Consumer Barometer, 2014

[7] Consumer Barometer, 2014
[8] Statista, 2014
[9] comScore, August 2014
[10] Consumer Barometer, 2014
[11] Statista, 2014

[12] Statista
[13] Consumer Barometer, 2014
[14] Consumer Barometer, 2014
[15] Consumer Barometer

SEASONALITY CALENDAR CHINA

- Retail
- Moveable feasts: dates change each year
- Travel
- Bank holiday
- Local
- BIM*
- Tech
- Finance



TARGETING CHINA EXPORTING OPPORTUNITIES

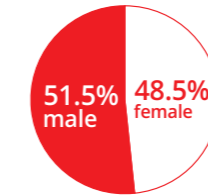
OVERVIEW

Population

1.36
billion ^[16]



Demographic Profile



Internet Population

47.8% ^[22]
648.75 million



Online Purchase

22.2% ^[25]



SEARCH AND DISPLAY

Web research for purchases

62%
% who used search engine ^[17]



Frequency of internet usage

85%
daily ^[20]



YouTube reach

YouTube is blocked in China, but a Business Insider report claims there are 60 million users in the country ^[23]

Use of online videos for product information

7% ^[29]



MOBILE

Mobile penetration

96.1%
total number of mobile connections ^[18]



Mobile sales

33%
used smartphone to research product ^[21]



Use of smartphones in consumer purchases

16%
used smartphone to make purchase ^[24]



KEY STATS

Languages Spoken

Chinese Mandarin (official); Yue (Cantonese); Wu (Shanghaiese); Minbei (Fuzhou); Minnan (Hokkien-Taiwanese); Xiang, Gan, Hakka dialects, and minority languages. ^[28]

Online purchase breakdown by product

- 75.6%** Apparel & accessories
- 45.1%** Consumer packaged goods
- 43.3%** Computing products & consumer electronics
- 34.9%** Virtual cards
- 32.7%** Handbags, briefcases, etc.
- 30.6%** Personal care & beauty products
- 25.7%** Books, video, music, etc.
- 22.7%** Home appliances
- 22.4%** Food and beverages
- 18%** Stationary, office supplies ^[26]

Online activities with smartphones

- 64%** Use search engines
- 60%** Visit social networks
- 50%** Watch online videos
- 37%** Play games
- 36%** Listen to music
- 29%** Look for product information
- 24%** Check email
- 15%** Look up maps and directions
- 10%** Purchase
- 8%** Use online banking ^[27]

NOTEWORTHY FACTS ^[30]

Alibaba accounted for over 86% of China's mobile shopping market in 2014.

52% of Chinese surveyed made their last clothing/footwear purchase online: one of the highest rates in world (2014)

China represents 54% of all internet users in Asia Pacific (2014).

*Business Industrial Markets.

*Qingming Festival - Traditional Chinese festival on the 104th day after the winter solstice. Serves as both a solar term and a Chinese traditional festival, and it signifies the fact that the days are becoming warm and bright.

*Dragon Boat Festival - Occurs on the fifth day of the fifth month of the lunar calendar. Activities consist of eating Zongzi, drinking Realgar wine and racing dragon boats.

*Qixi Festival - Falls on the seventh day of the seventh lunar month of the Chinese calendar.

*Mid-Autumn Festival - Falls on the 15th day of the eighth lunar month of the Chinese calendar. It is a time for family reunion.

SOURCES:

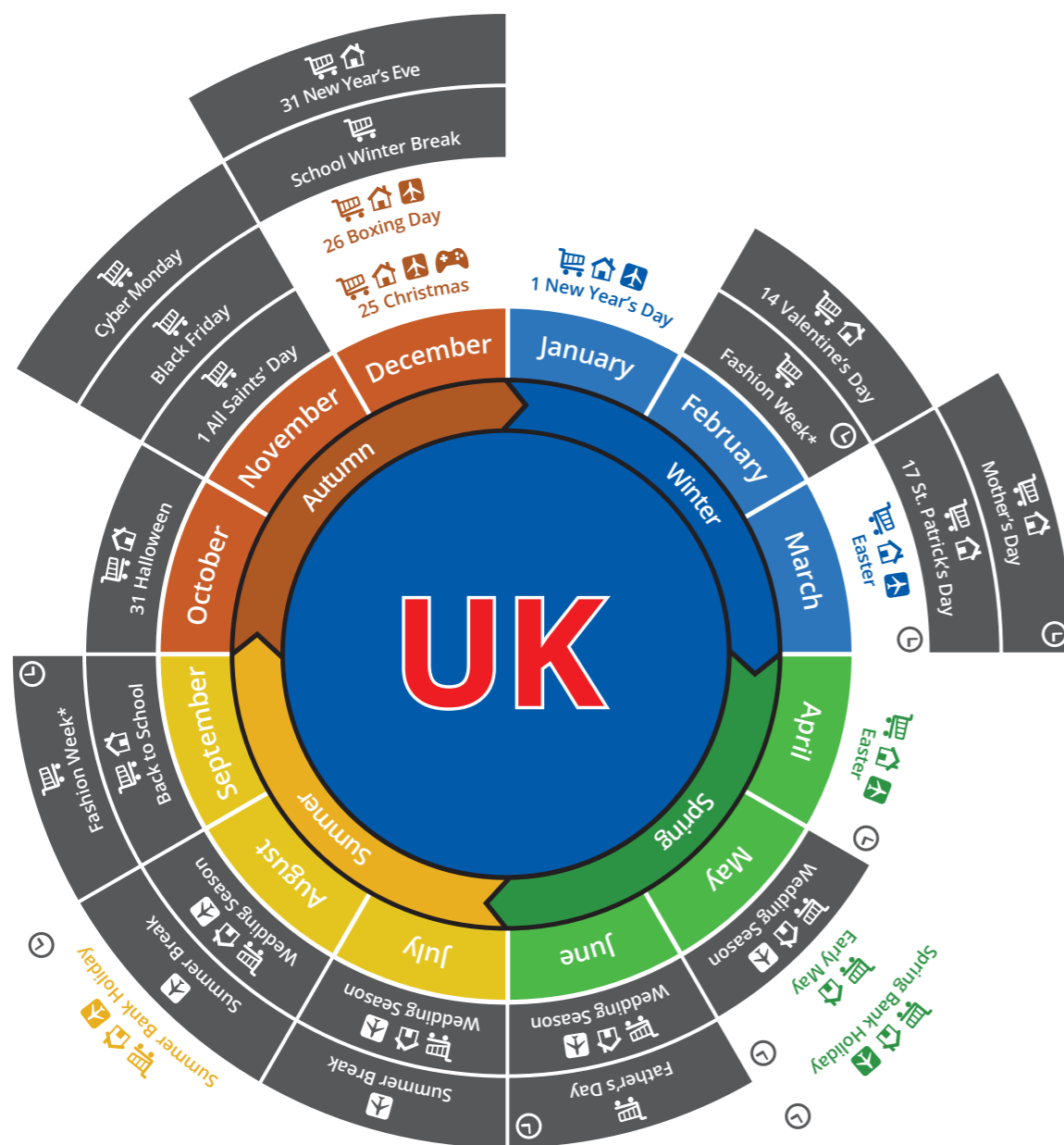
[16] CIA, The World Fact Book, July 2014
[17] Consumer Barometer, 2014
[18] eMarketer, December 2014
[19] CIA, The World Fact Book, July 2014
[20] Consumer Barometer, 2014

[21] Consumer Barometer, 2014
[22] Statista, 2014
[23] Cooper Smith, 2013
[24] Consumer Barometer, 2014
[25] Statista, 2013

[26] eMarketer, 2013
[27] Consumer Barometer, 2014
[28] CIA, The World Fact Book, July 2014
[29] Consumer Barometer, 2014
[30] China Internet Watch

SEASONALITY CALENDAR UK

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



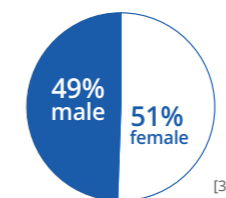
TARGETING UNITED KINGDOM EXPORTING OPPORTUNITIES

OVERVIEW

Population

63.7
million ^[31]

Demographic Profile



Internet Population

77.3% ^[37]
50.1 million

Online Purchase

88% ^[40]

SEARCH AND DISPLAY

Web research for purchases

48%
% who used search engine ^[32]

Frequency of internet usage

85%
daily ^[35]

YouTube reach

59%
of total internet audience ^[38]

Use of online videos for product information

7% ^[44]

MOBILE

Mobile penetration
130.9%
total number of mobile connections ^[33]

Mobile sales
14%
used smartphone to research product ^[36]

Use of smartphones in consumer purchases
6%
used smartphone to make purchase ^[39]

KEY STATS

Languages Spoken

English
(and regional languages Scot, Scottish Gaelic, Welsh, Irish, Cornish) ^[43]

Online purchase breakdown by product

- 63% Books
- 61% Clothing/footwear
- 54% DVDs
- 43% CDs
- 32% Beauty & healthcare
- 30% Kitchen & home goods
- 28% Toys & games
- 25% Electrical & photogenic
- 25% Garden & outdoor
- 23% Software & games ^[41]

Online activities with smartphones

- 59% Check email
- 57% Use search engines
- 50% Visit social networks
- 40% Look for product information
- 32% Watch online videos
- 26% Listen to music
- 26% Look up maps and directions
- 25% Use online banking
- 19% Purchase
- 15% Play games ^[42]

NOTEWORTHY FACTS ^[45]

28% of respondents in the UK researched their last purchase only online, the highest rate in Europe (2014).

In Europe, the British top the list regarding the amount of money spent buying goods online in 2014; the average consumer spent € 953.

SOURCES:

- [31] CIA, The World Fact Book, July 2014
- [32] Consumer Barometer, 2014
- [33] eMarketer, December 2014
- [34] CIA, The World Fact Book, July 2014
- [35] Consumer Barometer, 2014

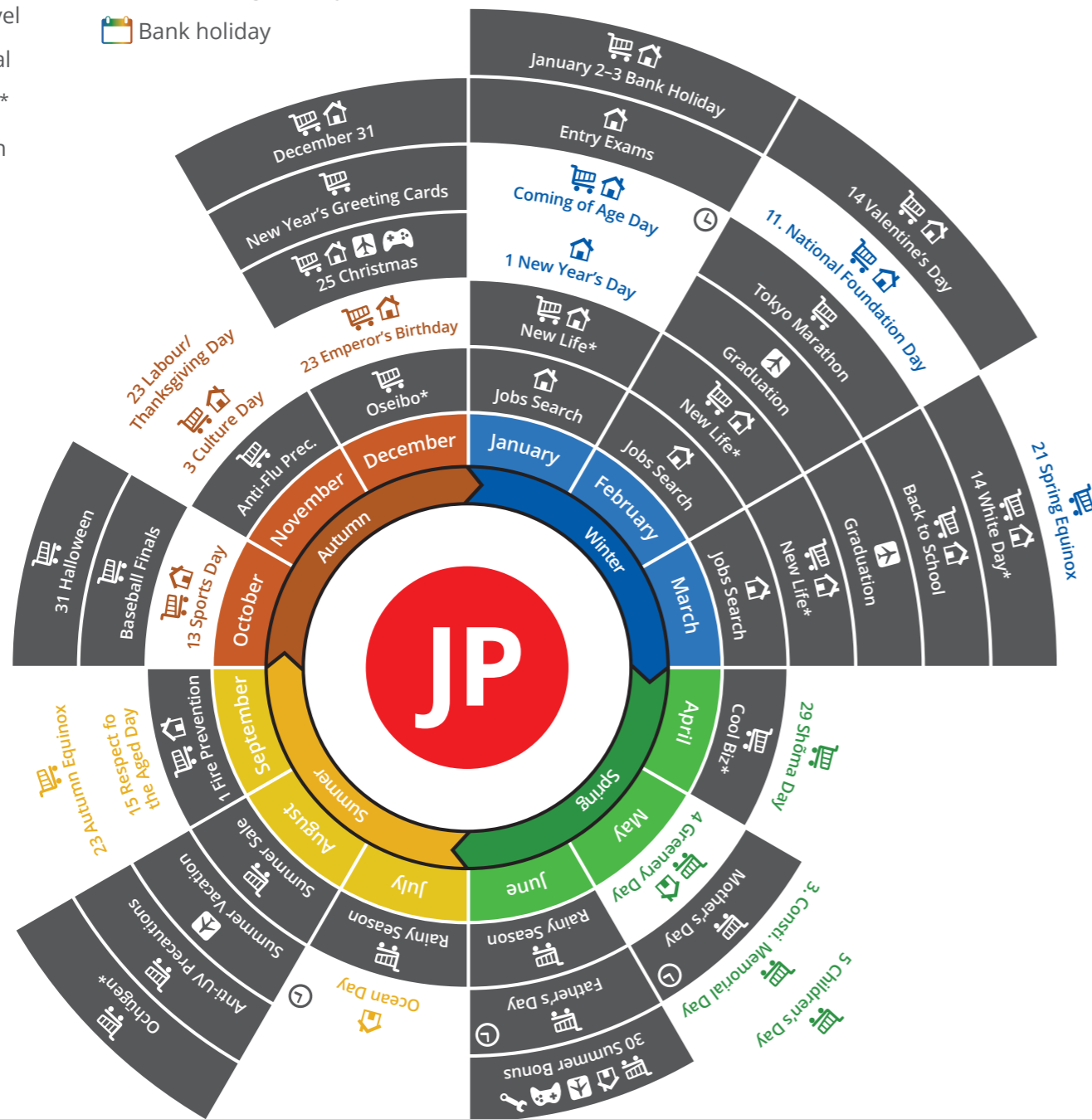
- [36] Consumer Barometer, 2014
- [37] eMarketer, December 2014
- [38] Statista, Fall 2013
- [39] Consumer Barometer, 2014
- [40] eMarketer, 2014

- [41] eMarketer, 2012
- [42] Consumer Barometer, 2014
- [43] CIA, The World Fact Book, 2014
- [44] Consumer Barometer, 2014
- [45] Consumer Barometer & comScore

*London Fashion Week - Apparel trade show held in London twice a year. Considered one of the "Big Four" fashion weeks worldwide.

SEASONALITY CALENDAR JAPAN

- Retail
- Travel
- Local
- BIM*
- Tech
- Moveable feasts: dates change each year
- Bank holiday



TARGETING JAPAN EXPORTING OPPORTUNITIES

OVERVIEW

Population
127.1
million [46]

Demographic Profile

48.3% male
51.2% female [49]

Internet Population
80.3% [52]
102.1 million

Online Purchases
81.3% [52]

SEARCH AND DISPLAY

Web research for purchases
53%
% who used search engine [47]

Frequency of internet usage
95%
daily [53]

YouTube Reach
49% [53]

Use of online videos for product information
5% [59]

MOBILE

Mobile penetration
113.3%
total number of mobile connections [48]

Mobile sales
15%
used smartphone to research product [51]

Use of smartphones in consumer purchases
5%
used smartphone to make purchase [54]

KEY STATS

Online purchase breakdown by product

43.8% Apparel and accessories
48.8% Books and magazines
33.5% Music and video
30.8% Consumer products, furniture, interior décor
28.8% PC, mobile and communications devices
17.5% AV systems
31.0% Pharmaceuticals and cosmetics
13.6% Video games

55.2% Food & beverages, alcoholic drinks
19.5% Office supplies & stationeries
27.4% Home appliances
12.9% Sporting goods
6.7% Baby products
6.9% Auto
3.0% Other

Online activities with smartphones

45% Check email
41% Use search engines
29% Visit social networks
24% Look for product information
18% Look up maps and directions
17% Watch online videos
13% Play games
11% Listen to music
8% Use online banking
5% Purchase [57]

NOTEWORTHY FACTS [60]

91% of Japanese respondents made their last purchase of flights online, one of the highest rates in the world (2014).

24% of Japanese respondents carried out only online research for their last purchase, the highest rate in Asia-Pacific (2014).

39% of respondents participated in contests/giveaways from brands on social media (2013).

*Cool Biz - Campaign started in 2005 by the Japanese Ministry of the Environment as a means to help reduce electric consumption by limiting the use of air conditioning.
*New Life - Shinseikatsu: Period in the beginning of the year when people start living on their own or move to another place. Often related to school advancement, graduation, first jobs and career switches.
*Ochūgen - Summer gift giving season to express gratitude (to co-workers, bosses, parents, teachers, etc).
*Oseibo - Winter gift giving season to express gratitude (to co-workers, bosses, parents, teachers, etc).
*White Day - Typically observed by boys and men presenting gifts to their girlfriends/wives, as a return of favor from Valentine's Day.

SOURCES:

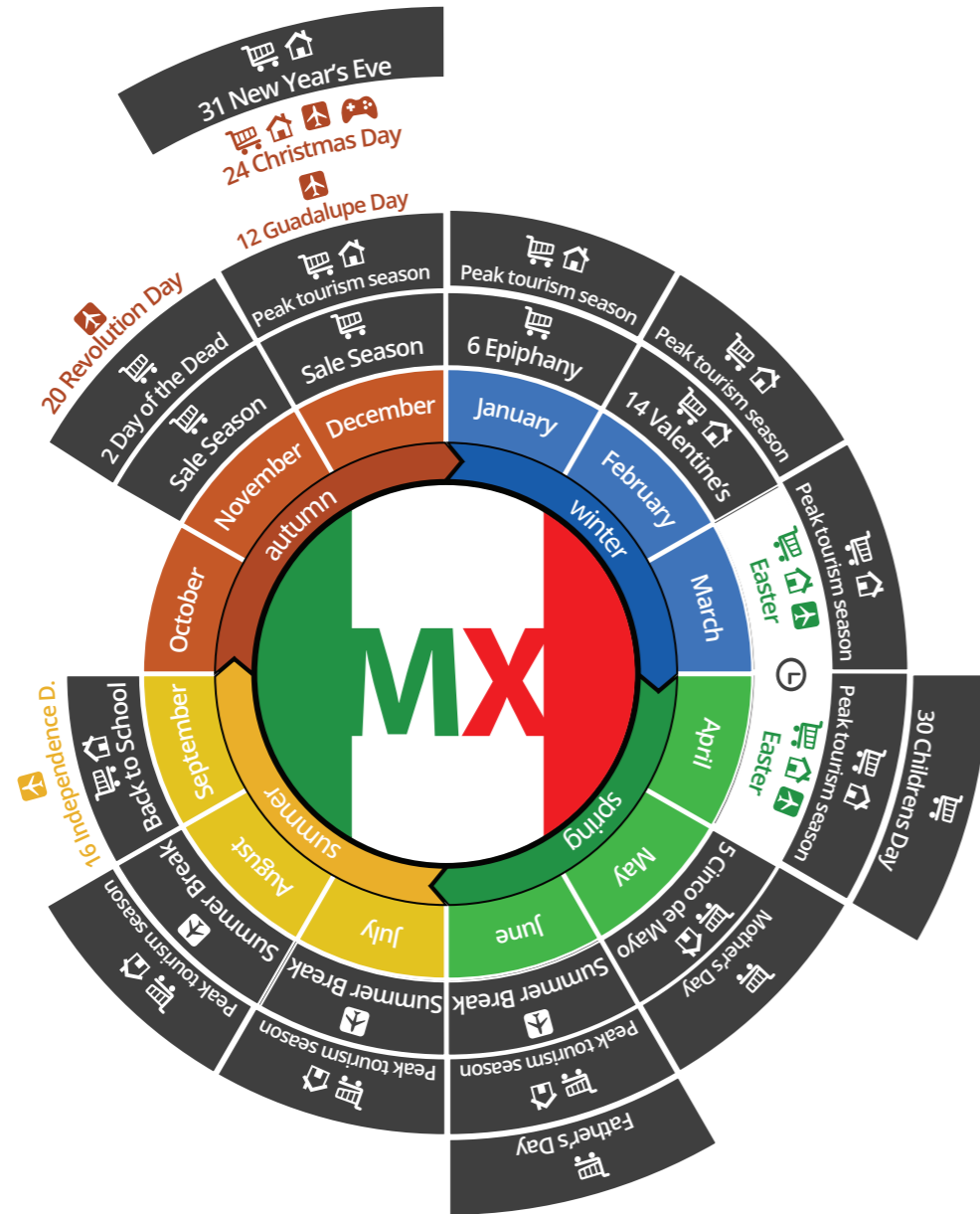
[46] CIA, The World Fact Book, 2014
[47] Consumer Barometer, 2014
[48] eMarketer, 2014
[49] CIA, The World Fact Book, 2014
[50] Consumer Barometer, 2014

[51] Consumer Barometer, 2014
[52] eMarketer, 2014
[53] eMarketer, Aug 2014
[54] Consumer Barometer, 2014
[55] eMarketer, 2014

[56] eMarketer, 2014
[57] eMarketer, 2014
[58] CIA, The World Fact Book, 2014
[59] Consumer Barometer, 2014
[60] Consumer Barometer & eMarketer

SEASONALITY CALENDAR MEXICO

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



TARGETING MEXICO EXPORTING OPPORTUNITIES

OVERVIEW

Population
120.29
million ^[61]

Demographic Profile

48.8% male
51.2% female ^[64]

Internet Population
49.7% ^[67]
59.4 million

Online Purchases
31.3% ^[70]

SEARCH AND DISPLAY

Web research for purchases
58%
% who used search engine ^[62]

Frequency of internet usage
52%
daily ^[65]

YouTube reach
69%
of total internet audience ^[6]

Use of online videos for product information
14% ^[74]

MOBILE

Mobile penetration
88.7%
total number of mobile connections ^[63]

Mobile sales
33%
used smartphone to research product ^[66]

Use of smartphones in consumer purchases
13%
used smartphone to make purchase ^[69]

KEY STATS

Languages Spoken

92.7% Spanish only
5.7% Spanish and indigenous languages
0.8% Indigenous only ^[73]

Online purchase breakdown by product ^[71]

- 70% Flights
- 47% Hotels
- 23% Apparel
- 20% Appliances
- 15% Cinema
- 14% Insurance
- 14% TV sets
- 6% Groceries

Online activities with smartphones ^[72]

- 31% Visit social networks
- 26% Check email
- 25% Watch online videos
- 24% Use search engines
- 24% Listen to music
- 17% Play games
- 16% Look up maps and directions
- 15% Look for product information
- 8% Use online banking
- 7% Purchase

NOTEWORTHY FACTS ^[75]

In a 2013 DHL study, 87.1% of cross-border buyers in Mexico had purchased from the United States. Canada ranked a distant second with 30%.

In 2014, 33% of Mexican smartphone users used their device during their last purchase, one of the highest rates in the region.

The leading reason the vast majority of Mexicans (78.1%) purchase abroad is to obtain products not available domestically, not because of price (2013).

SOURCES:

[61] CIA, The World Fact Book, 2014
[62] Consumer Barometer, 2014
[63] eMarketer, 2014
[64] CIA, The World Fact Book, 2014
[65] Consumer Barometer, 2014

[66] Consumer Barometer, 2014
[67] eMarketer, November 2014
[68] Statista, 2011
[69] Consumer Barometer, 2014
[70] eMarketer, November 2014

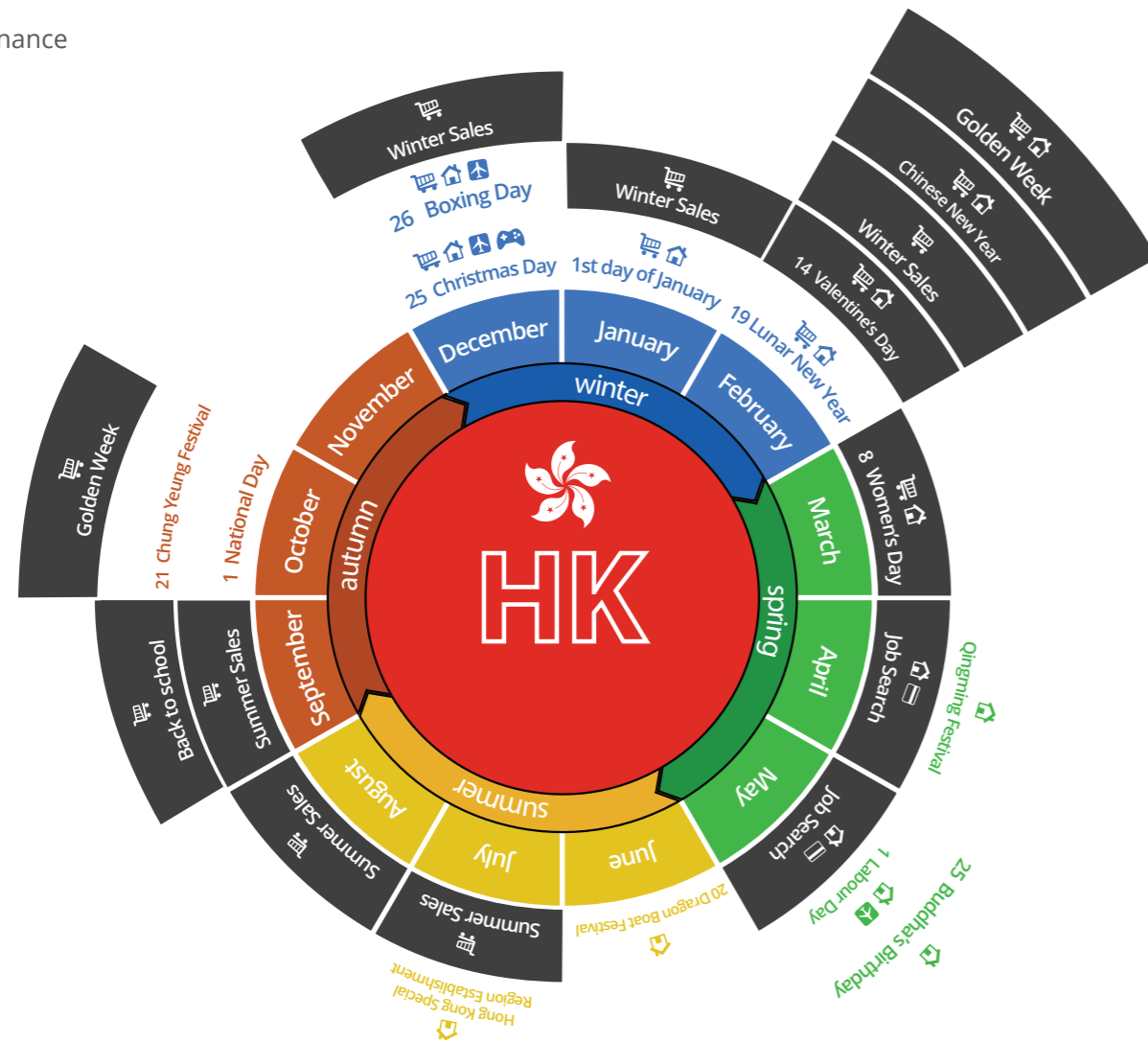
[71] Consumer Barometer, 2014
[72] Consumer Barometer, 2014
[73] CIA, The World Fact Book, 2014
[74] Consumer Barometer, 2014
[75] eMarketer, Consumer Barometer

*Guadalupe Day - One of the most important dates in Mexican calendar. Thousands of the faithful for Our Lady of Guadalupe make the most important of all pilgrimages of the year to the Basilica of Guadalupe.

*Cinco de Mayo - Celebration of the Mexican heritage and pride held on the 5th of May.

SEASONALITY CALENDAR HONG KONG

- Retail
- Travel
- Local
- BIM*
- Tech
- Finance
- Moveable feasts: dates change each year
- Bank holiday



TARGETING HONG KONG EXPORTING OPPORTUNITIES

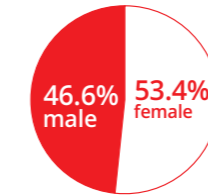
OVERVIEW

Population

7.12
million ^[76]



Demographic Profile



Internet Population

74.9% ^[82]
5.3 million



Online Purchases

66.4% ^[85]



SEARCH AND DISPLAY

Web research for purchases

66%
% who used search engine ^[77]



Frequency of internet usage

89%
daily ^[80]



YouTube reach

64.4%
of total internet audience ^[83]



Use of online videos for product information

11% ^[89]



MOBILE

Mobile penetration

229%
total number of mobile connections ^[78]



Mobile sales

37%
used smartphone to research product ^[81]



Use of smartphones in consumer purchases

15%
used smartphone to make purchase ^[84]



KEY STATS

Languages Spoken

89.5% Cantonese
3.5% English (official)
1.4% Putonghua (Mandarin)
4% other Chinese dialects ^[88]
1.6% other

Online purchase breakdown by product

75% Flights
71% Hotels
31% Apparel
31% Insurance
26% Cinema
13% TV sets
9% Groceries
4% Appliances ^[86]

Online activities with smartphones

59% Check email
54% Use search engines
54% Visit social networks
45% Look for product information
39% Watch online videos
37% Play games
35% Look up maps and directions
27% Listen to music
11% Use online banking
8% Purchase ^[87]

NOTEWORTHY FACTS ^[90]

People in Hong Kong use an average of 3 devices each (2014)

An average Hong Kong Internet user spends more than 25 hours online per month, making it one of the most engaged Internet markets.

87% of respondents obtain information about products/services on social media (2013).

*Business Industrial Markets.

* Golden Week is a semi-annual 7-day national holiday in mainland China. While Hong Kong doesn't celebrate Golden Week officially, tourists flock in from mainland China.

*According to Hong Kong laws, when a designated public holiday falls on a Sunday or on the same day of another holiday, the immediate following weekday would be a public holiday.

*If the statutory holiday falls on a rest day, a holiday should be granted on the day following the rest day which is not a statutory holiday or an alternative holiday or a substituted holiday or a rest day.

*If either Lunar (Chinese) New Year Day, the second day of Lunar New Year or the third day of Lunar New Year falls on a Sunday, the fourth day of Lunar New Year is designated as a statutory and general holiday in substitution.

*Chinese Winter Solstice Festival or Christmas Day (at the option of the employer).

SOURCES:

[76] CIA, The World Fact Book, 2014
[77] Consumer Barometer, 2014
[78] eMarketer, November 2014
[79] CIA, The World Fact Book, 2014
[80] Consumer Barometer, 2014

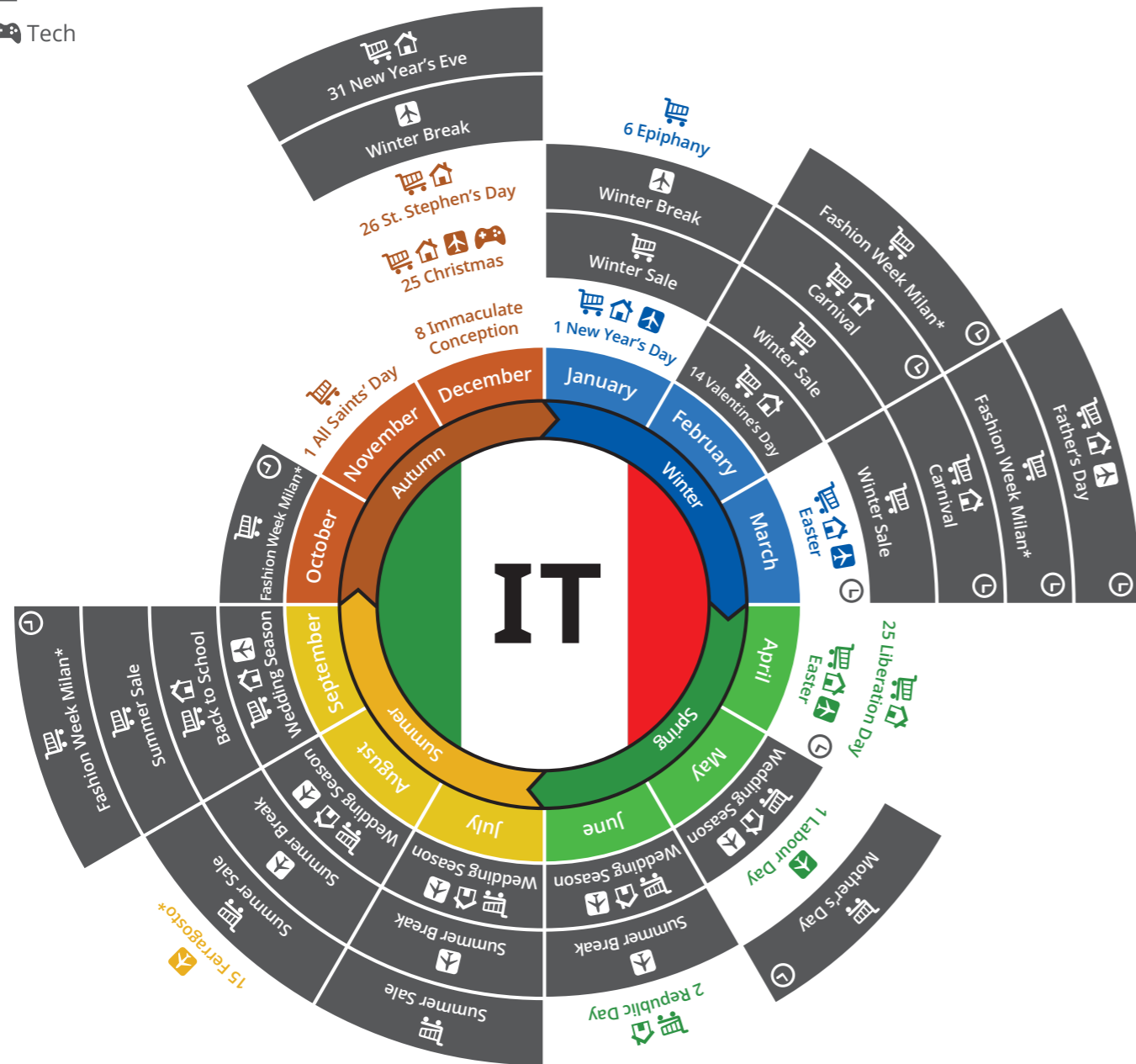
[81] Consumer Barometer, 2014
[82] eMarketer, November 2014
[83] Burson-Marsteller Asia-Pacific, 2011
[84] Consumer Barometer, 2014
[85] eMarketer, 2012

[86] Consumer Barometer, 2014
[87] Consumer Barometer, 2014
[88] CIA, The World Fact Book, July 2014
[89] Consumer Barometer, 2014
[90] Consumer Barometer, comStore

Export with Google

SEASONALITY CALENDAR ITALY

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



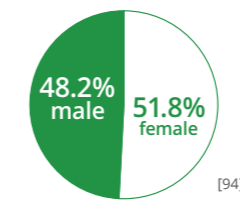
TARGETING ITALY EXPORTING OPPORTUNITIES

OVERVIEW

Population

61.68
million ^[91]

Demographic Profile



Internet Population

58%
35.8 million ^[97]

Online Purchases

46.3% ^[100]

SEARCH AND DISPLAY

Web research for purchases

50%
% who used search engine ^[92]

Frequency of internet usage

76%
daily ^[95]

YouTube reach

59%
of total internet audience ^[98]

Use of online videos for product information

12% ^[104]

MOBILE

Mobile penetration

151.1%
total number of mobile connections ^[93]

Mobile sales

13%
used smartphone to research product ^[96]

Use of smartphones in consumer purchases

3%
used smartphone to make purchase ^[99]

KEY STATS

Languages Spoken

Italian (official), German, French, Slovene.

Online purchase breakdown by product

83% Flights
69% Hotels
29% Apparel
27% Insurance
17% TV sets
17% Appliances
13% Cinema
3% Groceries

Online activities with smartphones

44% Use search engines
42% Check email
34% Visit social networks
28% Watch online videos
25% Look for product information
22% Look up maps and directions
17% Listen to music
11% Play games
4% Use online banking
3% Purchase ^[102]

NOTEWORTHY FACTS ^[105]

42% of respondents in Italy researched both online and offline before their last purchase, the highest rate in Western Europe (2014).

Italy has the lowest internet penetration rate in Western Europe; only 53.1% of the population accessed the web on at least a monthly basis,

63% consider it very important that the lowest price is on offer if they are to buy from a website (2014).

SOURCES:

[91] CIA, The World Fact Book, July 2014
[92] Consumer Barometer, 2014
[93] eMarketer, December 2014
[94] CIA, The World Fact Book, July 2014
[95] Consumer Barometer, 2014

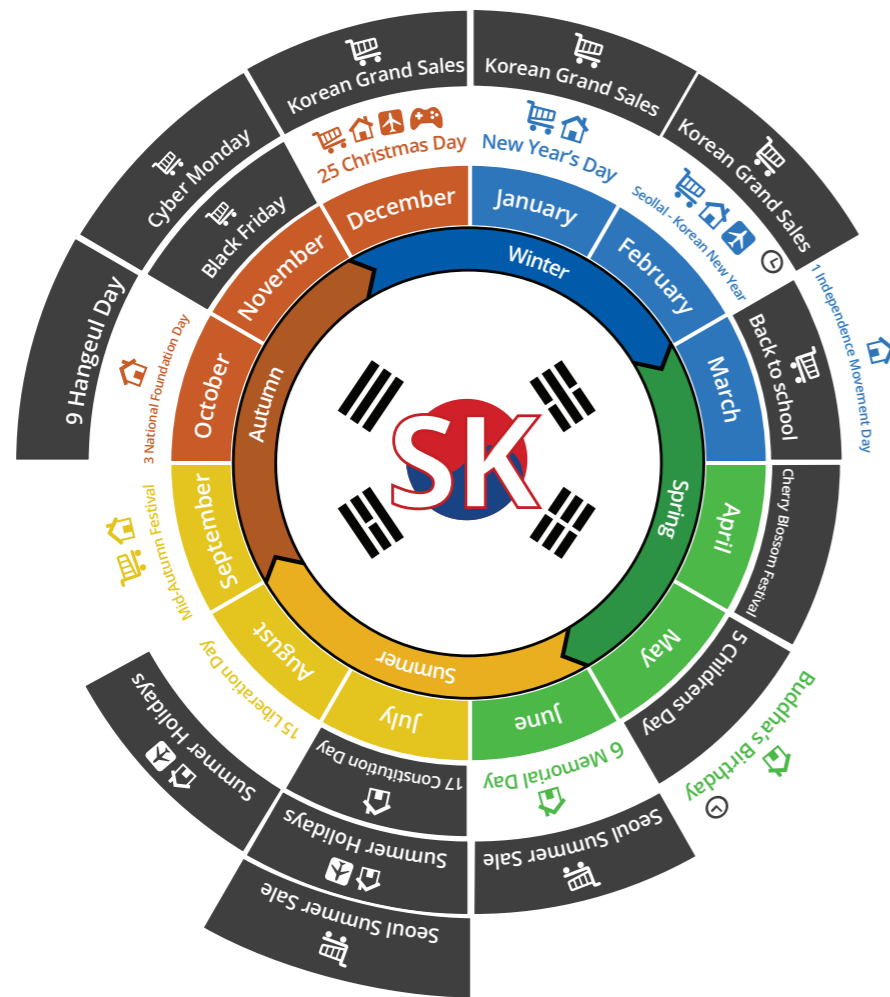
[96] Consumer Barometer, 2014
[97] eMarketer, November 2014
[98] Statista, Fall 2013
[99] Consumer Barometer, 2014
[100] eMarketer, 2014

[101] Consumer Barometer, 2014
[102] Consumer Barometer, 2014
[103] CIA, The World Fact Book, July 2014
[104] Consumer Barometer, 2015
[105] Consumer Barometer & eMarketer

*Fashion Week Milan – Held semi-annually in Milan. Part of the "Big Four" Worldwide Fashion weeks.
*Ferragosto – Italian holiday to commemorate the Assumption of the Blessed Virgin Mary.

SEASONALITY CALENDAR SOUTH KOREA

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



TARGETING SOUTH KOREA EXPORTING OPPORTUNITIES

OVERVIEW

Population
49.04
million ^[106]

Demographic Profile

49.9% male 50.1% female ^[109]

Internet Population
82.3%
40.3 million ^[112]

Online Purchases
73% ^[115]

SEARCH AND DISPLAY

Web research for purchases
72%
% who used search engine ^[107]

Frequency of internet usage
93%
daily ^[110]

YouTube reach
36.7%
^[113]

Use of online videos for product information
6% ^[119]

MOBILE

Mobile penetration
113.7%
total number of mobile connections ^[108]

Mobile sales
44%
used smartphone to research product ^[111]

Use of smartphones in consumer purchases
25%
used smartphone to make purchase ^[114]

KEY STATS

Online purchase breakdown by product	
68.2%	Cosmetics
50.1%	Clothing, footwear, sporting goods/accessories
46.4%	Bookings/reservations
30.6%	Computer equipment or parts
30.5%	Video
21%	Music products (incl. streaming)
20.2%	Other paid content (work/school-related contents)
18.3%	Home electronic appliances
15.9%	Computer/video games
15%	Books, magazines, newspapers
12.8%	Food, groceries (incl. health foods)
11.7%	Toys/furniture
5%	Computer software (excl. games)

Online activities with smartphones	
88%	Use search engines
66%	Watch online videos
52%	Look for product information
50%	Check email
41%	Look up maps and directions
40%	Listen to music
36%	Visit social networks
31%	Play games
30%	Purchase
30%	Use online banking

NOTEWORTHY FACTS ^[120]

Online research rates for shopping are over 50% almost everywhere, but they are highest in Asia, especially South Korea (83%).

75% of South Koreans respondents made their last purchase of clothing or footwear online, one of the highest rates in the world (2014).

77% of respondents in South Korea click on ads posted on social media by brands they like (2013)

SOURCES:

[106] CIA, The World Fact Book, July 2014
[107] Consumer Barometer, 2014
[108] eMarketer, December 2014
[109] CIA, The World Fact Book, July 2014
[110] Consumer Barometer, 2014

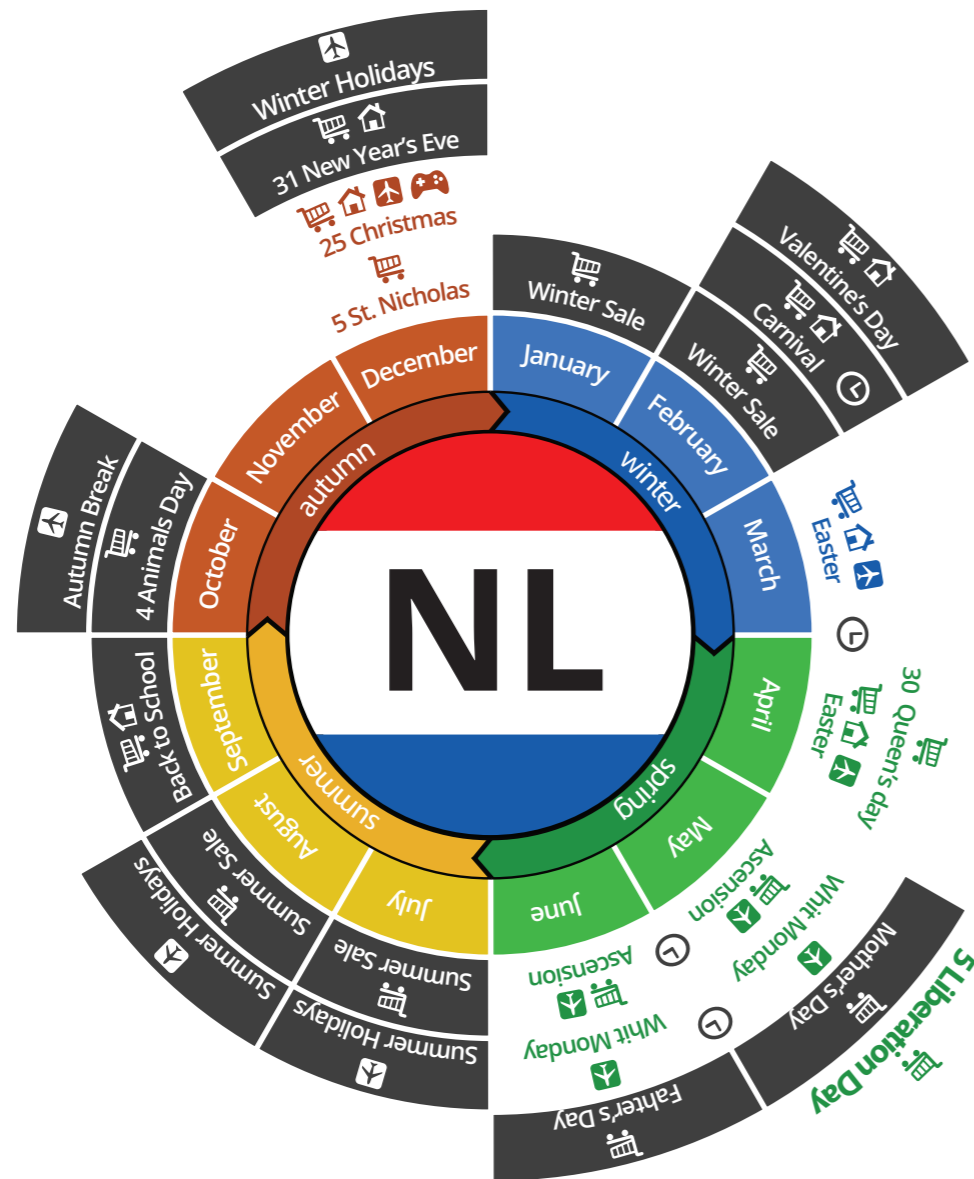
[111] Consumer Barometer, 2014
[112] eMarketer, November 2014
[113] eMarketer, December 2014
[114] Consumer Barometer, 2014
[115] eMarketer, 2014

[116] Statista, Fall 2014
[117] Consumer Barometer, 2014
[118] CIA, The World Fact Book, July 2014
[119] Consumer Barometer, 2014
[120] Consumer Barometer, 2014

*The Korean government has announced that from the second half of 2014 onwards, if the date of Seollal, Chuseok, or Children's Day falls on Sunday, then the holiday will be extended to Monday.
*Constitution Day is not statutory.
*A national Korean commemorative day marking the invention and the proclamation of the Korean alphabet.

SEASONALITY CALENDAR NETHERLANDS

- Retail
- Travel
- Local
- Tech
- Moveable feasts: dates change each year
- Bank holiday



TARGETING NETHERLANDS EXPORTING OPPORTUNITIES

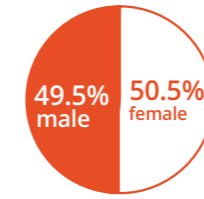
OVERVIEW

Population

16.9
million ^[121]



Demographic Profile



Internet Population

85%
14.3 million ^[127]



Online Purchases

77% ^[130]



SEARCH AND DISPLAY

Web research for purchases

40%

% who used search engine ^[122]



Frequency of internet usage

85%

daily ^[125]



YouTube reach

74%

^[128]



Use of online videos for product information

6% ^[133]



MOBILE

Mobile penetration

133.2%

total number of mobile connections ^[123]



Mobile sales

7%

used smartphone to research product ^[126]



Use of smartphones in consumer purchases

2%

used smartphone to make purchase ^[129]



KEY STATS

Online purchase breakdown by product

58% Travel and holiday accommodation	34% Software
49% Clothes and sports items	34% Electronic equipment
44% Tickets for events	12% Groceries, cosmetics, cleaning products
43% Books, magazines and newspapers	11% Hardware
35% Household goods and appliances	6% Financial products and services
34% Films, music	

Online activities with smartphones

50% Check email
47% Use search engines
40% Visit social networks
26% Look for product information
25% Use online banking
23% Watch online videos
22% Look up maps and directions
18% Listen to music
12% Play games
3% Purchase ^[131]

NOTEWORTHY FACTS ^[134]

The Netherlands is among the top nations for mobile device usage, using an average of 3.6 devices each (2014).

The country's 11.76 million digital buyers made 53.5 million digital purchases in the first quarter of 2014.

51% of people in the Netherlands use tablets, one of the highest penetration rates in the world (2014).

SOURCES:

[121] CIA, The World Fact Book, July 2014
[122] Consumer Barometer, 2014
[123] eMarketer, 2014
[124] CIA, The World Fact Book, July 2014
[125] Consumer Barometer, 2014

[126] Consumer Barometer, 2014
[127] eMarketer, 2014
[128] Statista, Fall 2011
[129] Consumer Barometer, 2014
[130] eMarketer, 2014

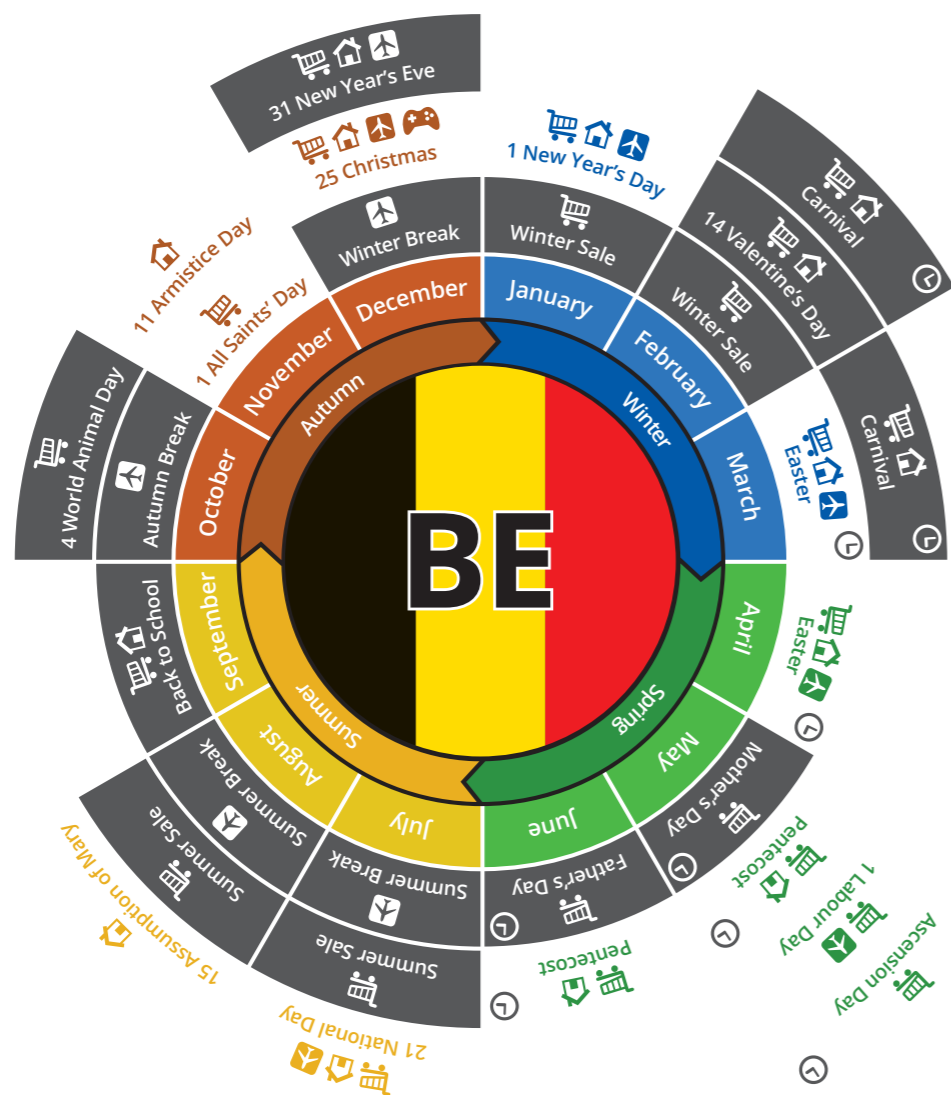
[131] Consumer Barometer, 2014
[132] CIA, The World Fact Book, July 2014
[133] Consumer Barometer, 2014
[134] Consumer Barometer, eMarketer

*Kings Day - From 2014 onwards the name is to be changed from Queen's Day to King's Day. The date has also changed from 30 April to 27 April, which is the birthday of Willem-Alexander, the King of the Netherlands.

SEASONALITY CALENDAR BELGIUM

- Retail
- Travel
- Local
- BIM*
- Tech

- Moveable feasts:
dates change each year
- Bank holiday



TARGETING BELGIUM EXPORTING OPPORTUNITIES

OVERVIEW

Population
10.45
billion ^[135]

Demographic Profile

49% male
51% female ^[138]

Internet Population
82%
8.6million ^[141]

Online Purchase
63% ^[144]

SEARCH AND DISPLAY

Web research for purchases
39%
% who used search engine ^[135]

Frequency of internet usage
77%
daily ^[138]

YouTube reach
59%
^[139]

Use of online videos for product information
7% ^[148]

MOBILE

Mobile penetration
106.4%
active sims ^[137]

Mobile sales
5%
used smartphone to research product ^[140]

Use of smartphones in consumer purchases
2%
used smartphone to make purchase ^[143]

KEY STATS

Languages Spoken

60% Dutch
40% French
1% German

(all official)

Online purchase breakdown by product

69% Flights
67% Hotels
37% Apparel
35% Cinema tickets
23% Large home appliances
17% Car insurance
12% TV sets
2% Groceries

^[145]

Online activities with smartphones

29% Check email
28% Use search engines
25% Visit social networks
17% Look for product information
16% Watch online videos
13% Listen to music
12% Look up maps and directions
9% Use online banking
8% Play games
1% Purchase

^[146]

NOTEWORTHY FACTS ^[149]

In 2012, Belgium ranked #1 for growth in time spent online amongst European countries. Users spent two hours more online in 2012 than they did the year before.

The issue of free delivery is relatively significant in Benelux, with 45 per cent of those questioned feeling that this is 'very important' (2014).

SOURCES:

[135] CIA, The World Fact Book, July 2014
[136] Consumer Barometer, 2014
[137] eMarketer, September 2014
[138] CIA, The World Fact Book, July 2014
[139] Consumer Barometer, 2014

[140] Consumer Barometer, 2014
[141] Statista, 2014
[142] Statista, Fall 2013
[143] Consumer Barometer, 2014
[144] eMarketer, 2014

[145] Consumer Barometer, 2014
[146] Consumer Barometer, 2014
[147] CIA, The World Fact Book, July 2014
[148] Consumer Barometer, 2014
[149] Consumer Barometer & PostNord