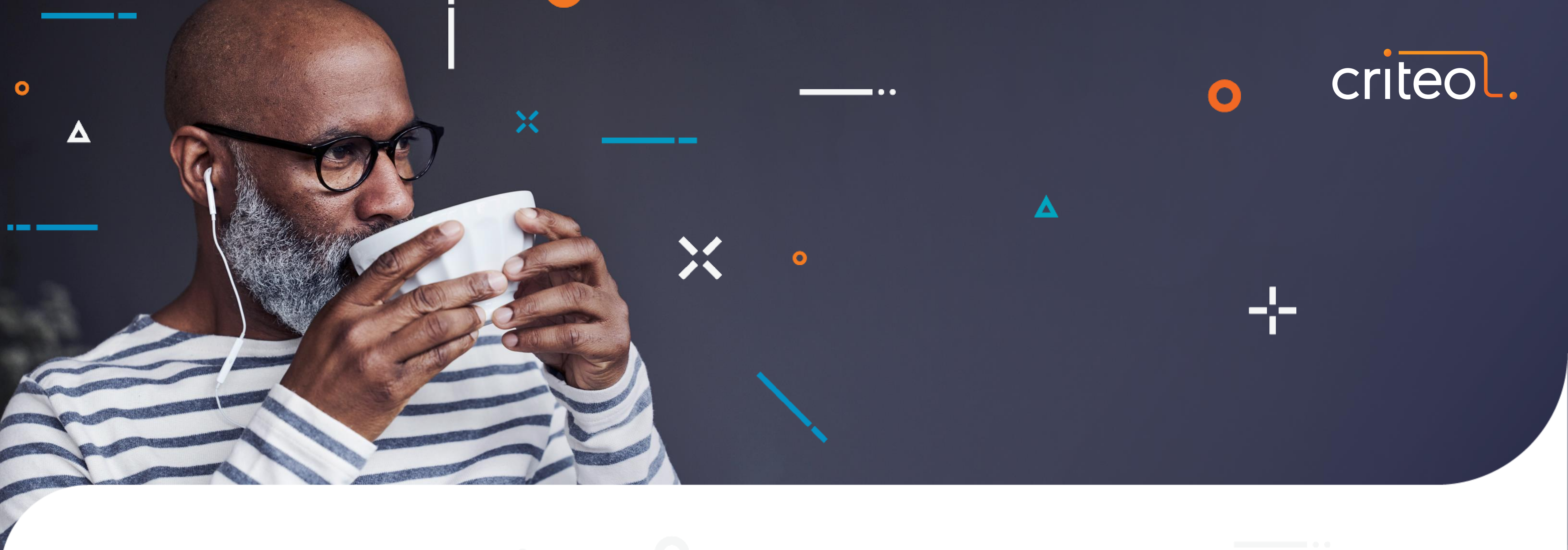

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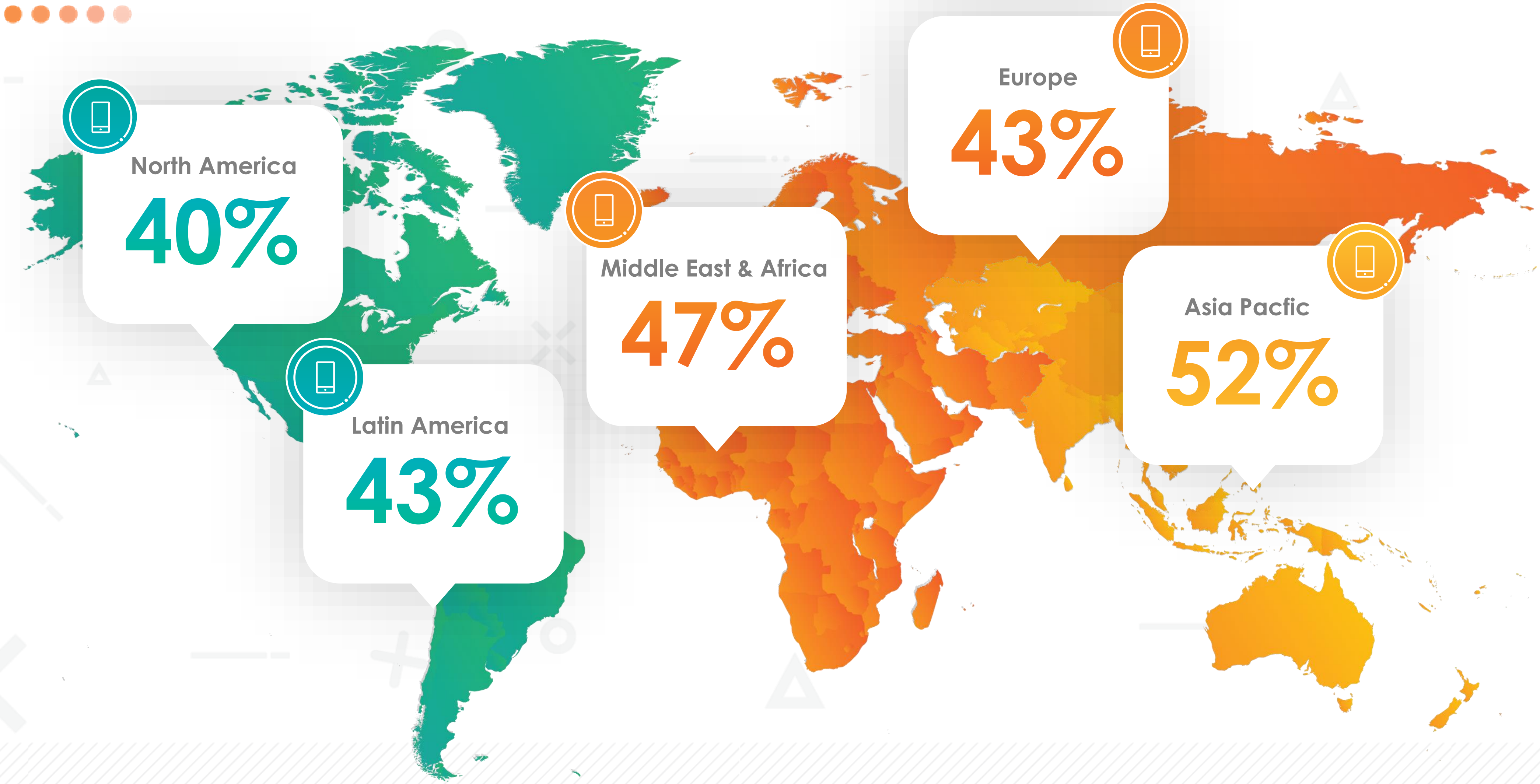
Global Commerce Review

EMEA, Q3 2018

2018

Mobile Marches On

In APAC, Mobile now accounts for the majority of transactions



Source: Criteo, Q3 2018. **Base:** sales weighted aggregate, Apps excluded (see Methodology).

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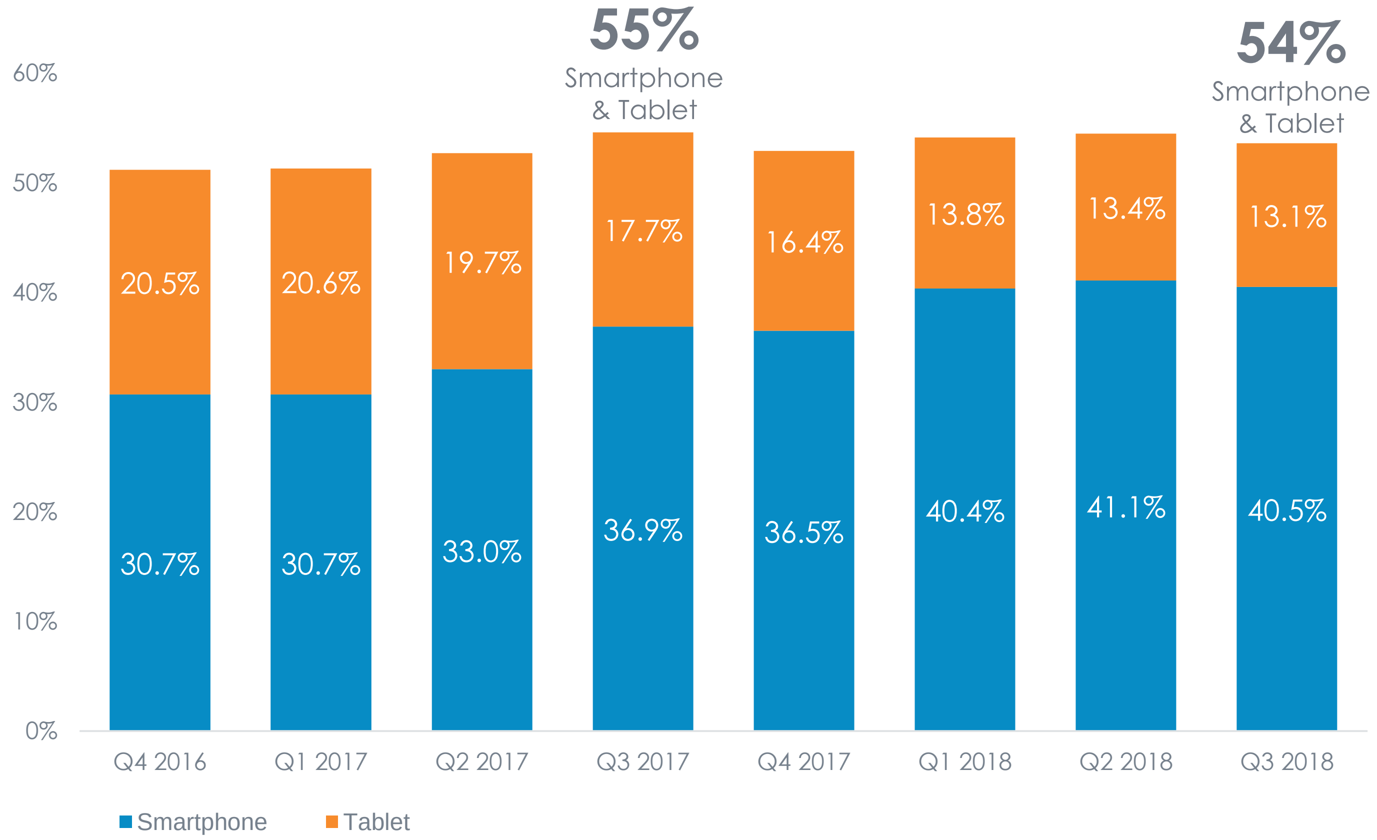
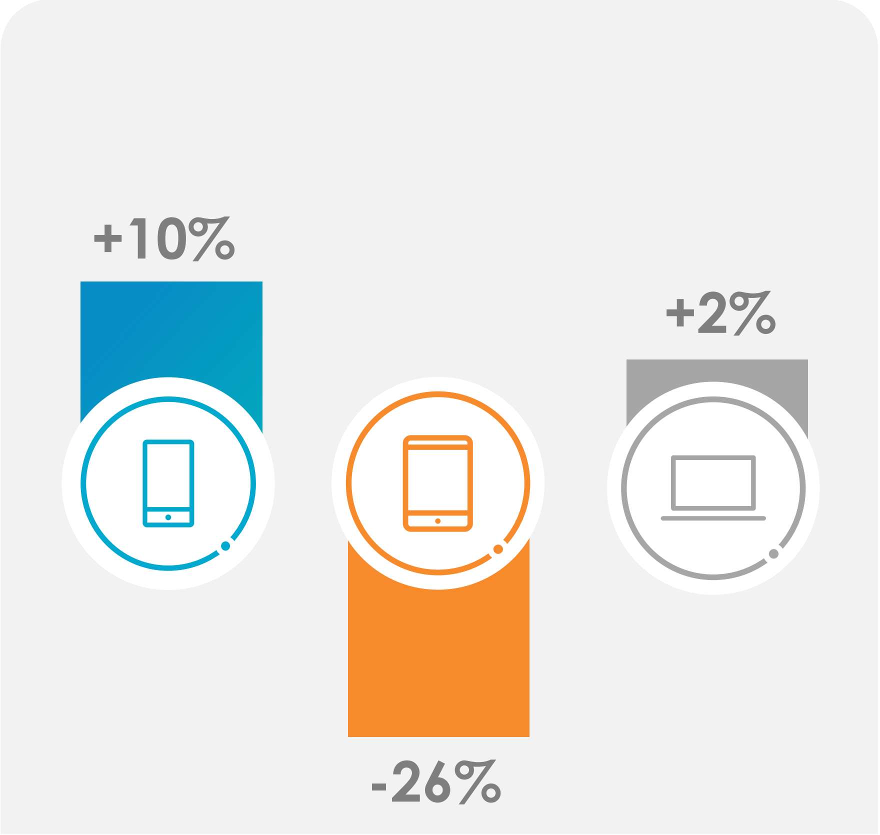
Mobile Share of Transactions

Mobile web plateaus, making room for app to surge

Sales by Device, Q3 2017 and Q3 2018, United Kingdom, Apps Excluded



Q3 2018 vs Q3 2017, by Device



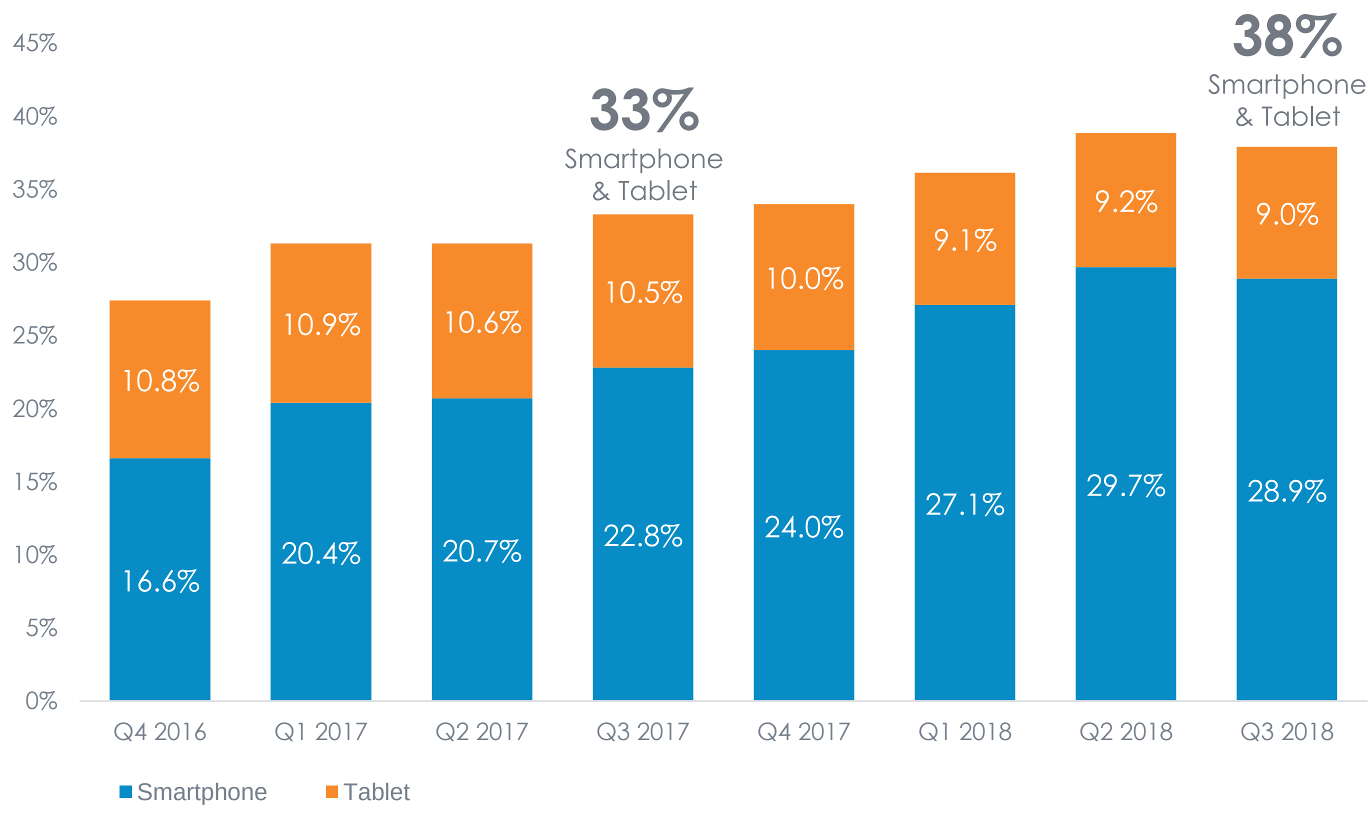
Source: Criteo, United Kingdom, Q3 2018.

Base: sales weighted aggregate, Apps excluded (see Methodology).

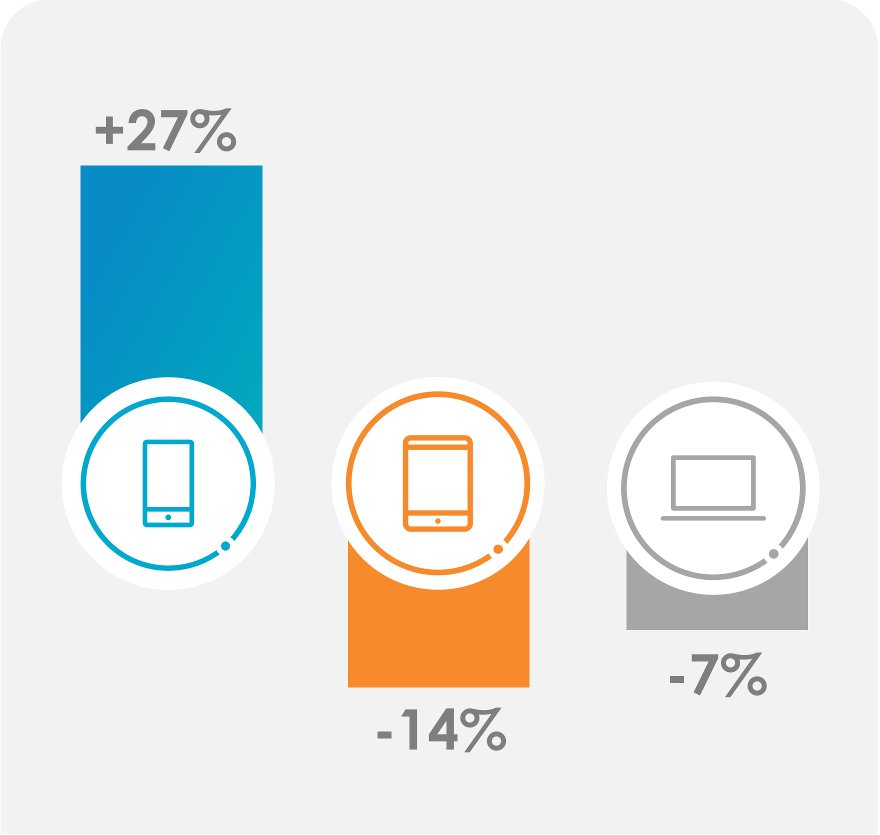
Mobile Share of Transactions

Mobile continues to steal share, driven by an increase in smartphone transactions

Sales by Device, Q3 2017 and Q3 2018, France, Apps Excluded



Q3 2018 vs Q3 2017, by Device



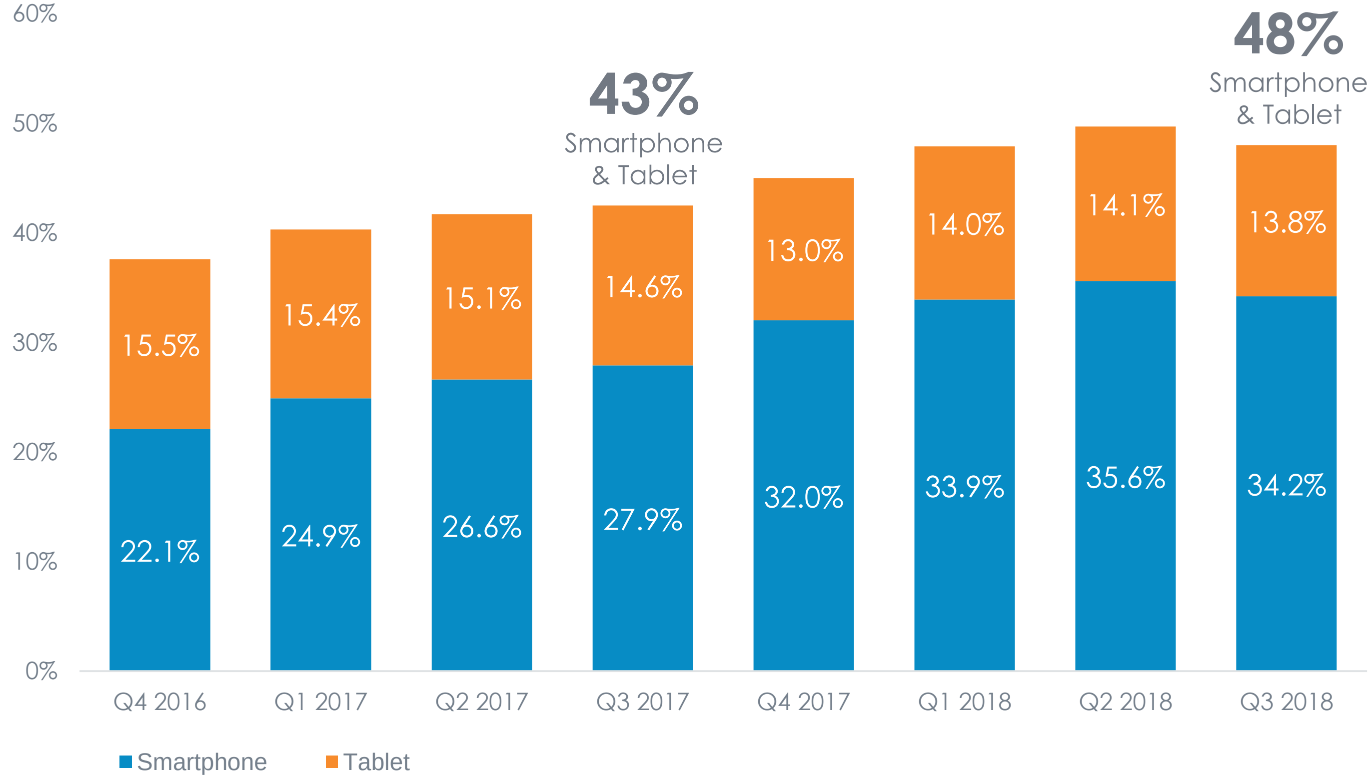
Source: Criteo, France, Q3 2018.

Base: sales weighted aggregate, Apps excluded (see Methodology).

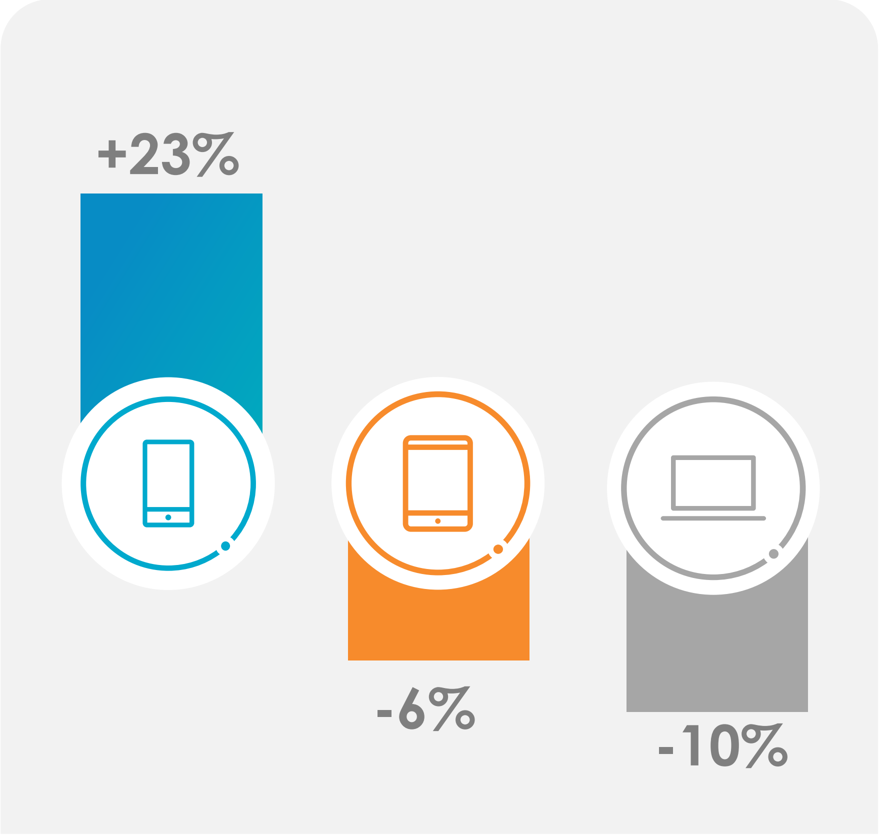
Mobile Share of Transactions

Mobile continues to steal share, driven by an increase in smartphone transactions

Sales by Device, Q3 2017 and Q3 2018, Germany, Apps Excluded



Q3 2018 vs Q3 2017, by Device



Source: Criteo, Germany, Q3 2018.

Base: sales weighted aggregate, Apps excluded (see Methodology).

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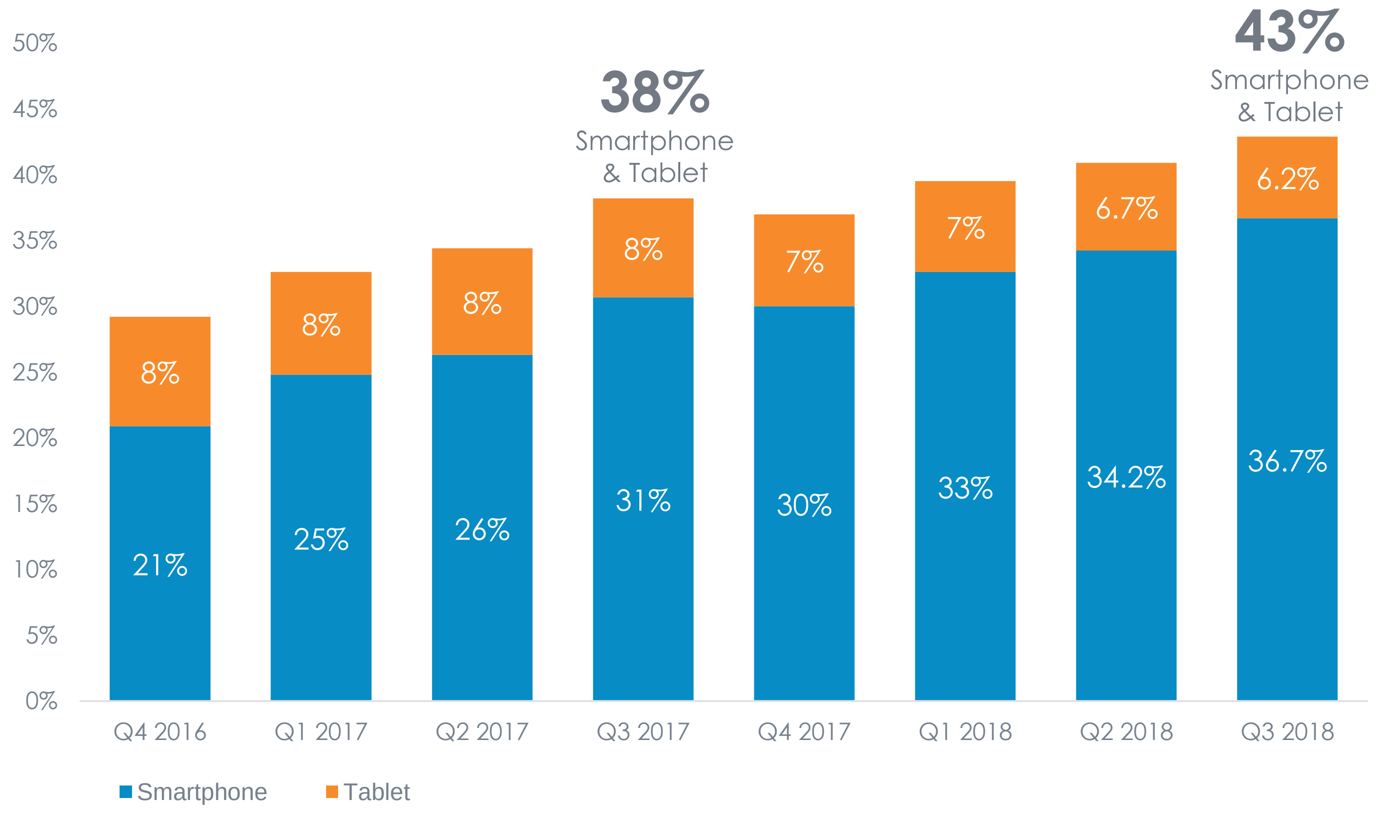
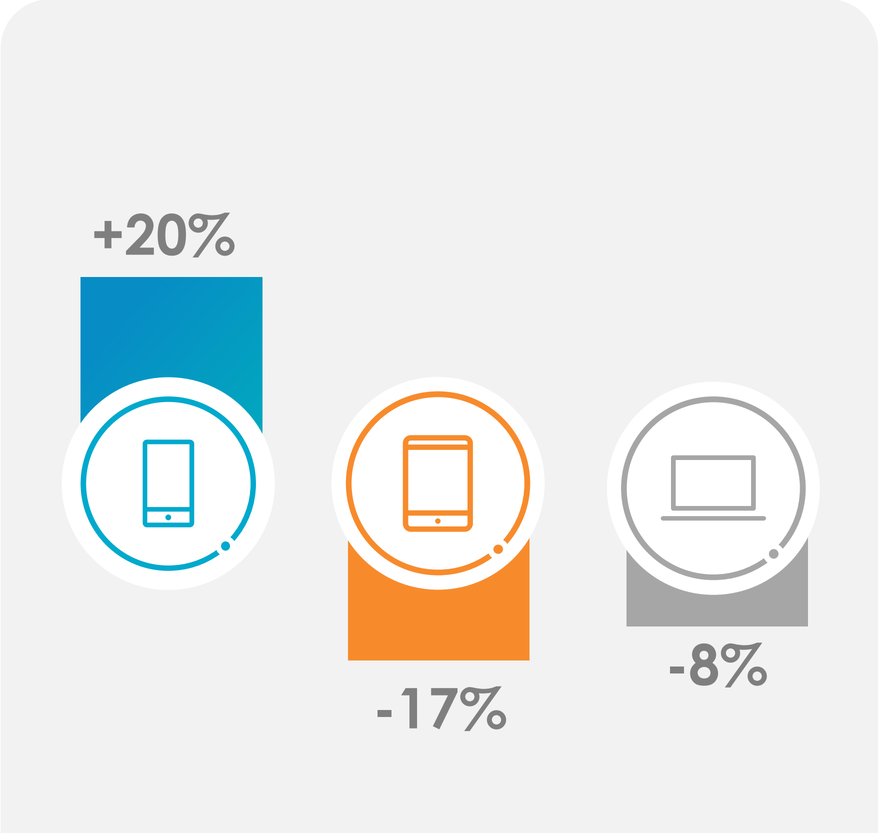
Mobile Share of Transactions

Mobile continues to steal share, driven by an increase in smartphone transactions

Sales by Device, Q3 2017 and Q3 2018, Italy, Apps Excluded



Q3 2018 vs Q3 2017, by Device



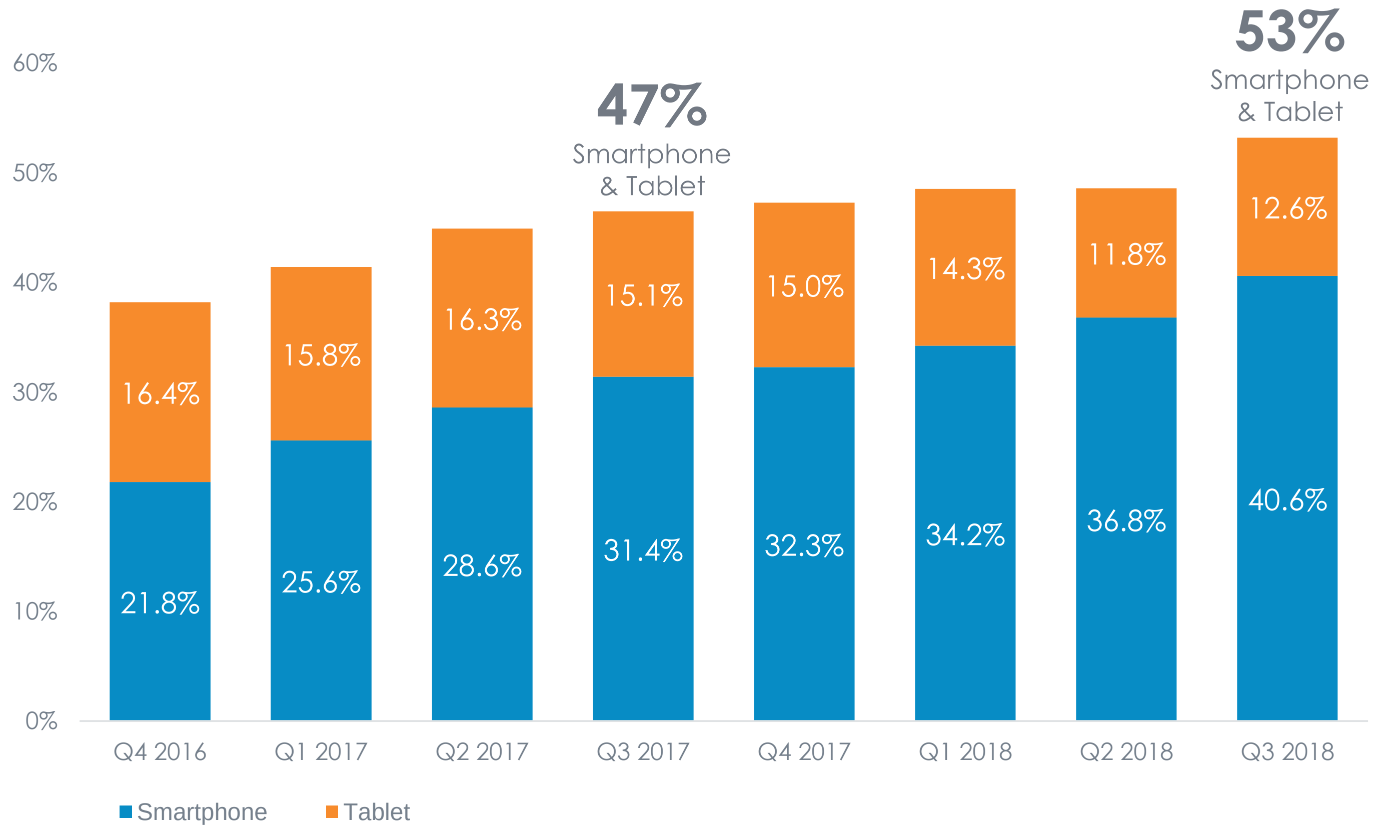
Source: Criteo, Italy, Q3 2018.

Base: sales weighted aggregate, Apps excluded (see Methodology).

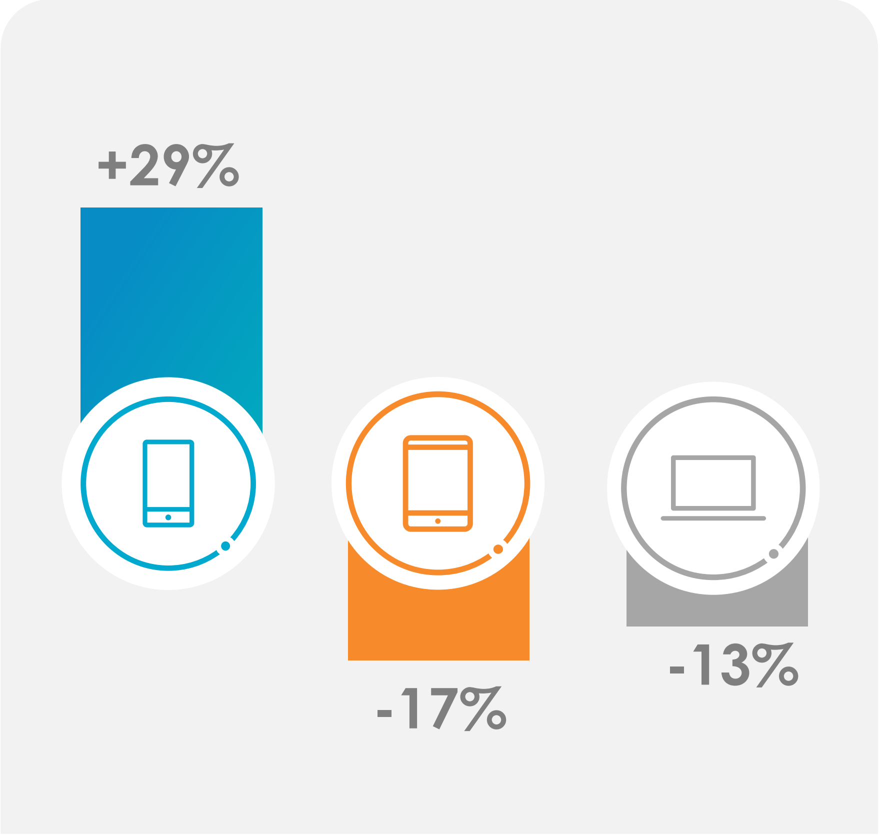
Mobile Share of Transactions

Mobile continues to steal share, driven by an increase in smartphone transactions

Sales by Device, Q3 2017 and Q3 2018, Netherlands, Apps Excluded



Q3 2018 vs Q3 2017, by Device



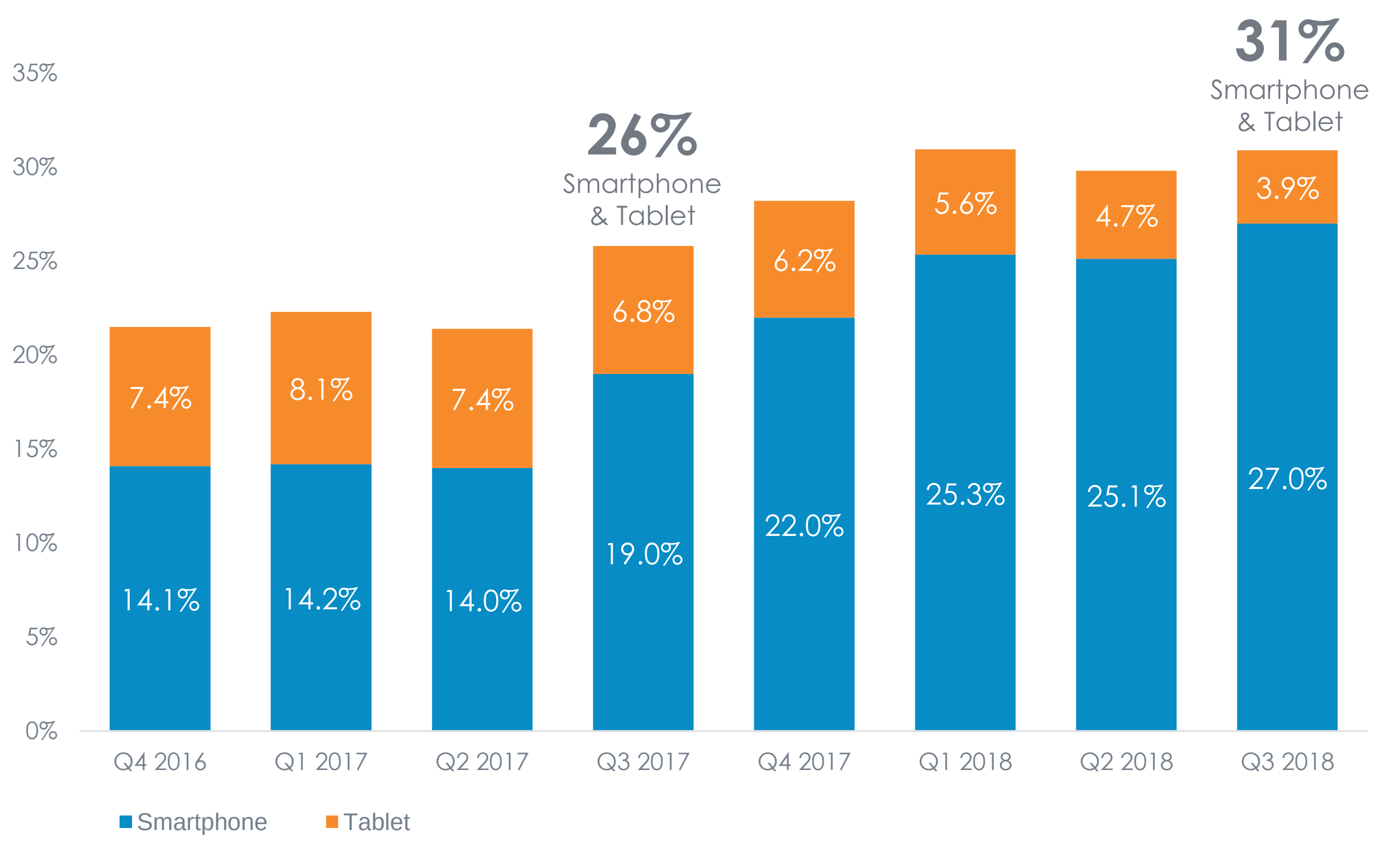
Source: Criteo, Netherlands, Q3 2018.

Base: sales weighted aggregate, Apps excluded (see Methodology).

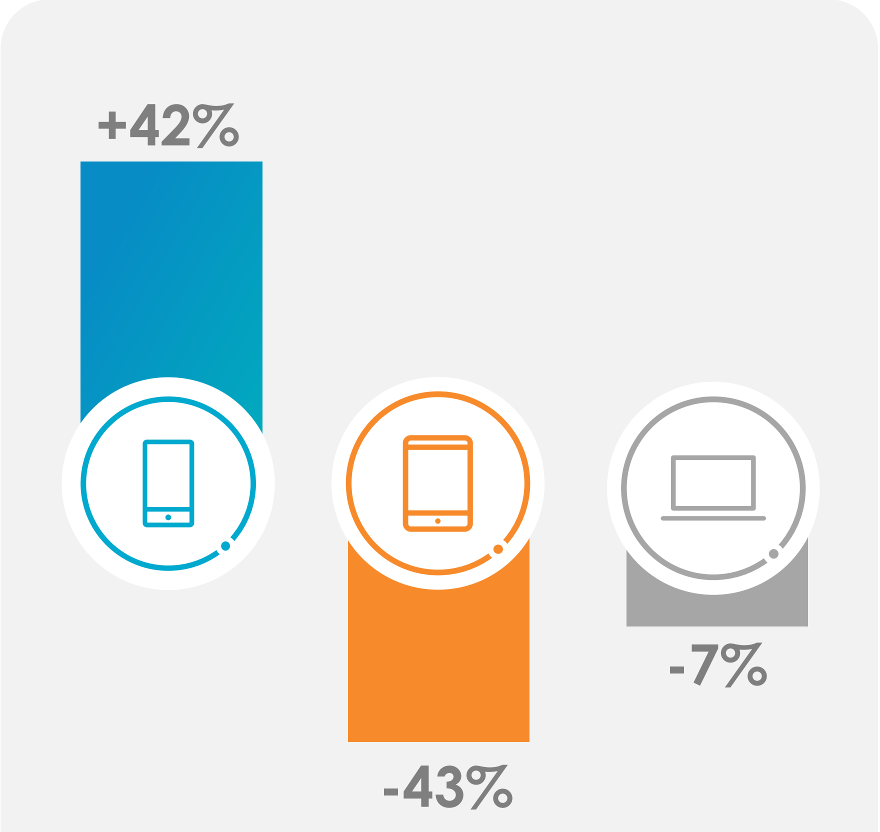
Mobile Share of Transactions

Mobile continues to steal share, driven by an increase in smartphone transactions

Sales by Device, Q3 2017 and Q3 2018, Russia, Apps Excluded



Q3 2018 vs Q3 2017, by Device



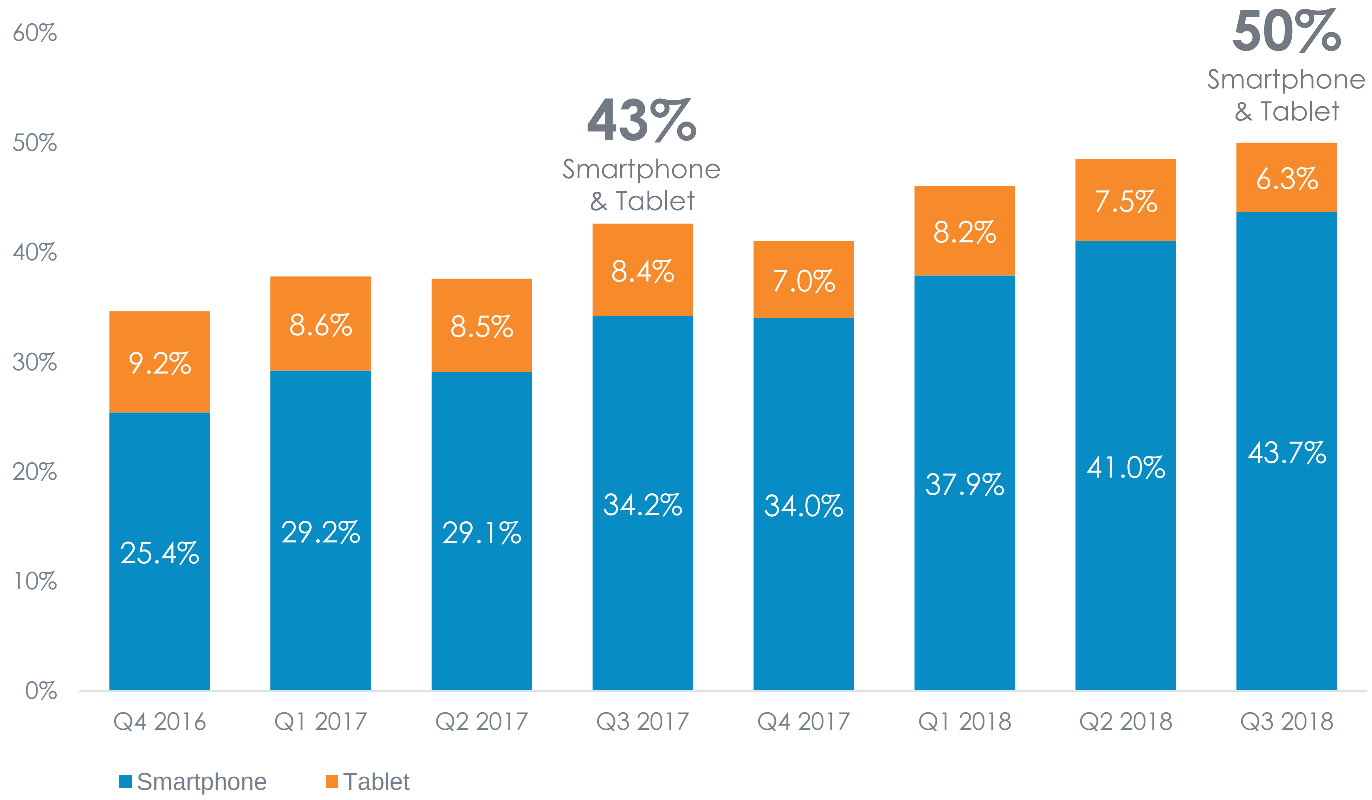
Source: Criteo, Russia, Q3 2018.

Base: sales weighted aggregate, Apps excluded (see Methodology).

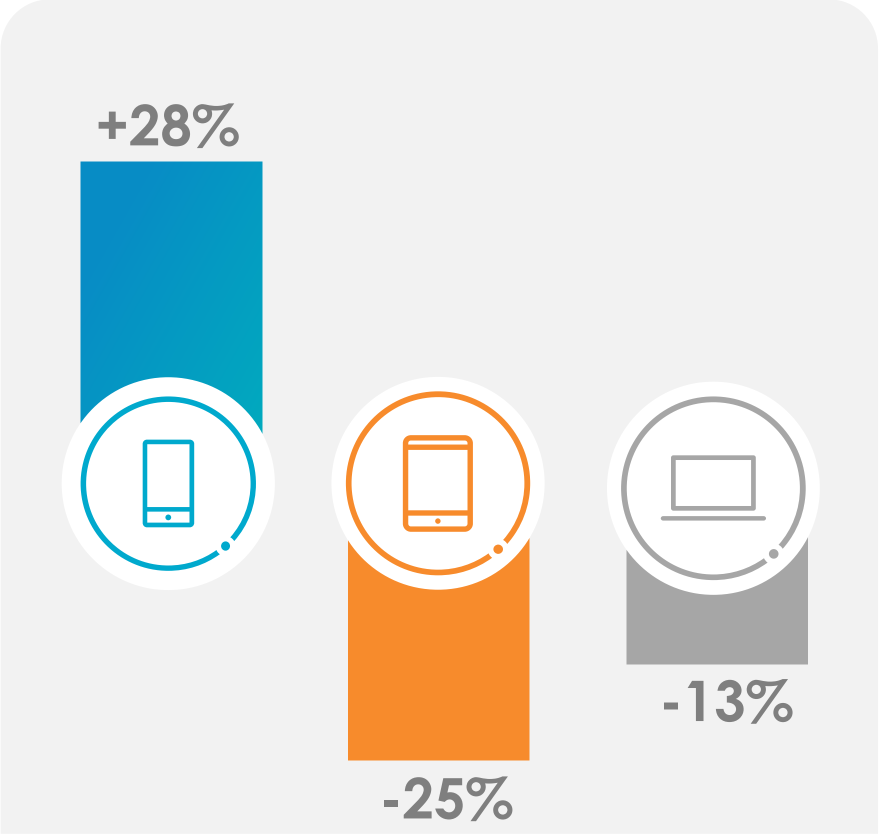
Mobile Share of Transactions

Mobile continues to steal share, driven by an increase in smartphone transactions

Sales by Device, Q3 2017 and Q3 2018, Spain, Apps Excluded



Q3 2018 vs Q3 2017, by Device



Source: Criteo, Spain, Q3 2018.

Base: sales weighted aggregate, Apps excluded (see Methodology).

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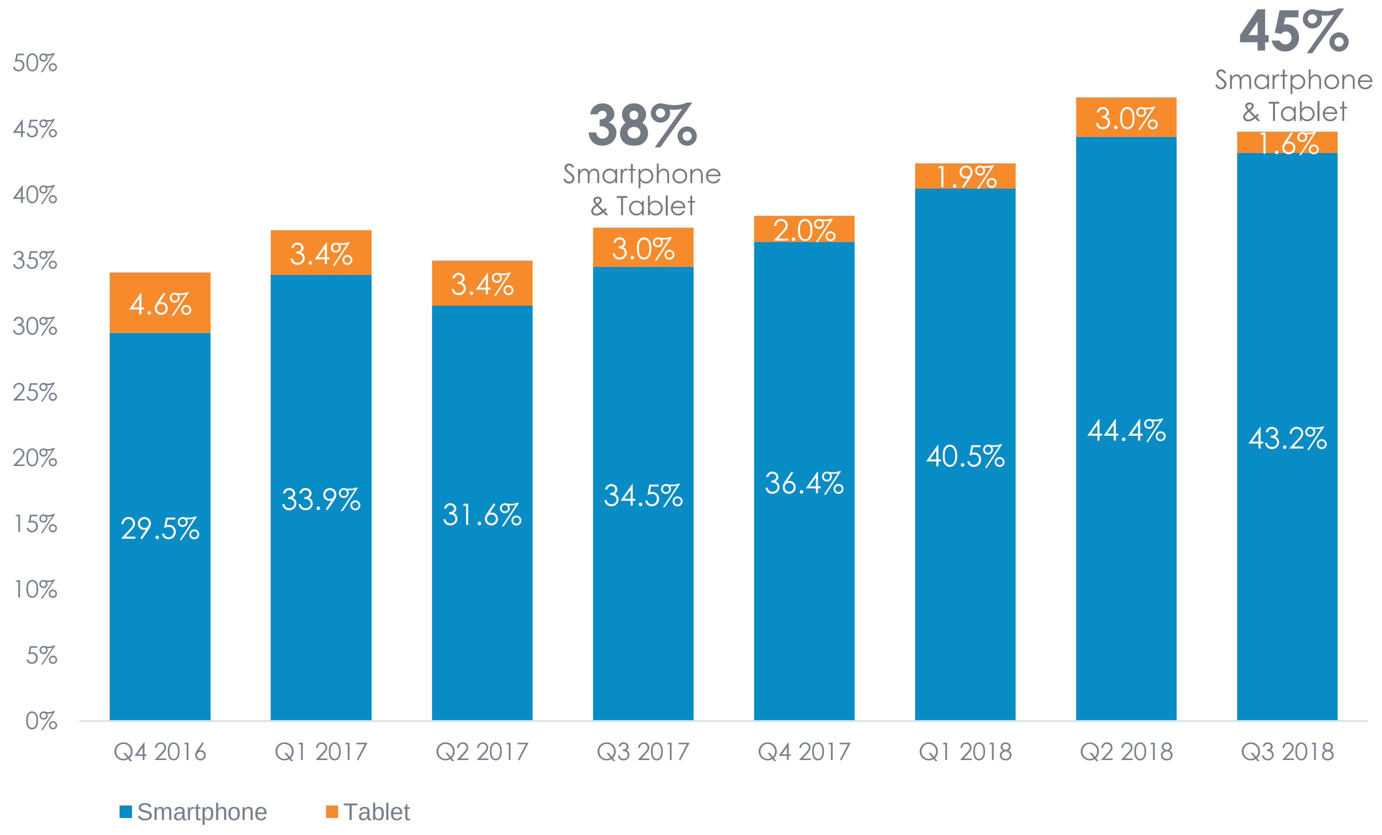
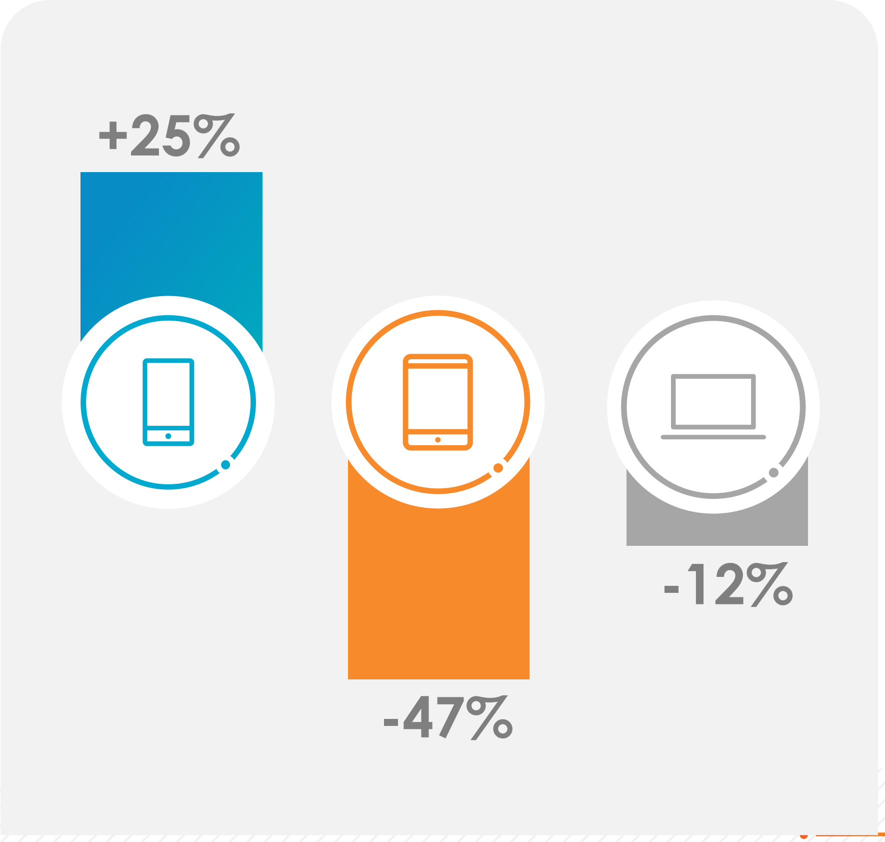
Mobile Share of Transactions

Mobile continues to steal share, driven by an increase in smartphone transactions

Sales by Device, Q3 2017 and Q3 2018, MEA, Apps Excluded



Q3 2018 vs Q3 2017, by Device



Source: Criteo, Middle East & Africa, Q3 2018. **Base:** sales weighted aggregate, Apps excluded (see Methodology).

Mobile Marches On

Northern Europe and Japan are mobile leaders.

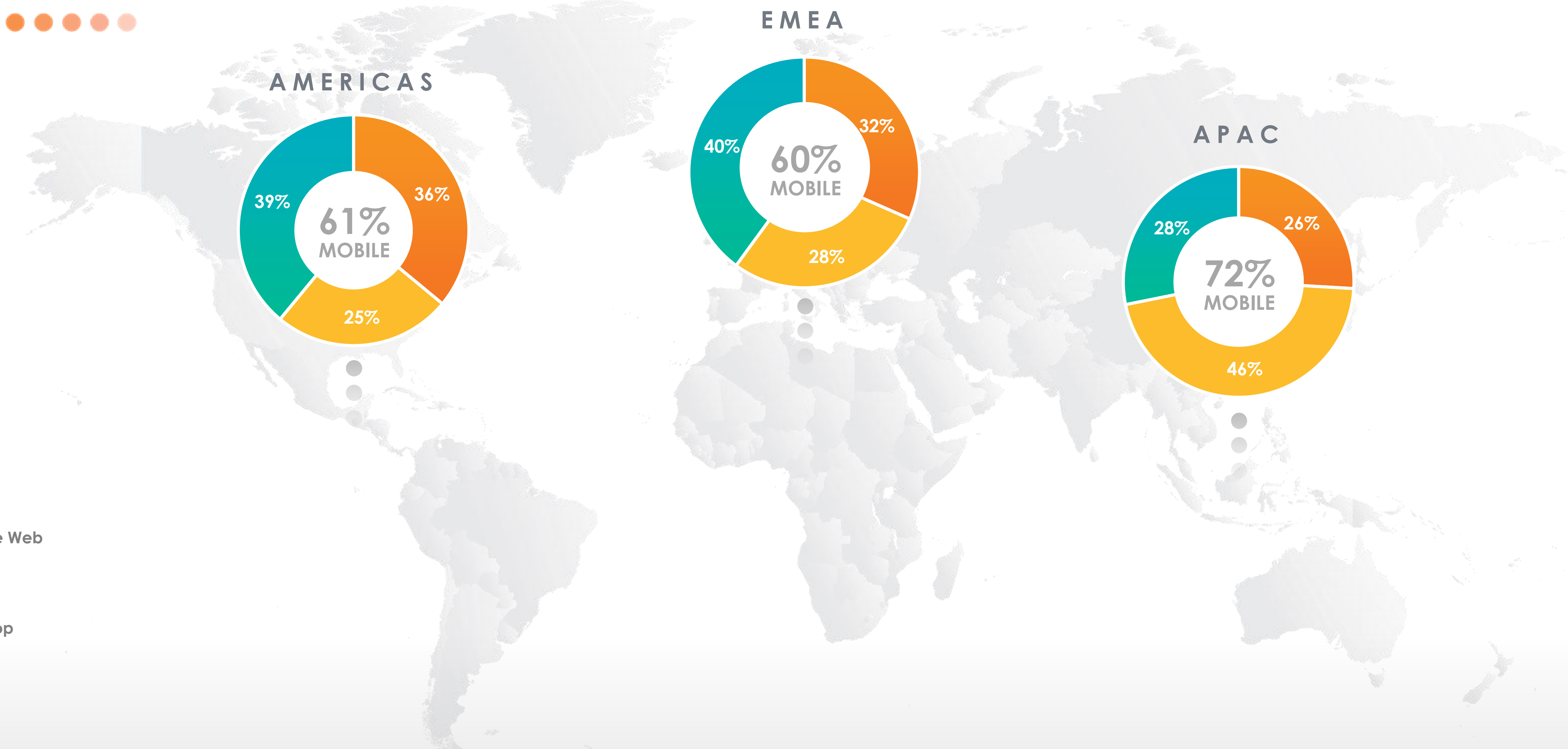
Sweden	60%
Norway	57%
Japan	54%
United Kingdom	54%
Netherlands	53%
Denmark	52%
South Korea	51%
Finland	50%
Spain	50%
Germany	48%
Turkey	45%
Austria	44%

Australia	43%
New Zealand	43%
Switzerland	43%
Brazil	43%
Italy	43%
Taiwan	41%
United States	40%
Belgium	39%
France	38%
Canada	35%
Poland	34%
Russia	31%

Source: Criteo, Q3 2018. **Base:** sales weighted aggregate, Apps excluded (see Methodology).

App Opportunity

For retailers who actively promote their shopping apps, mobile transactions represent 63% of all Transactions



Mobile Web
App
Desktop

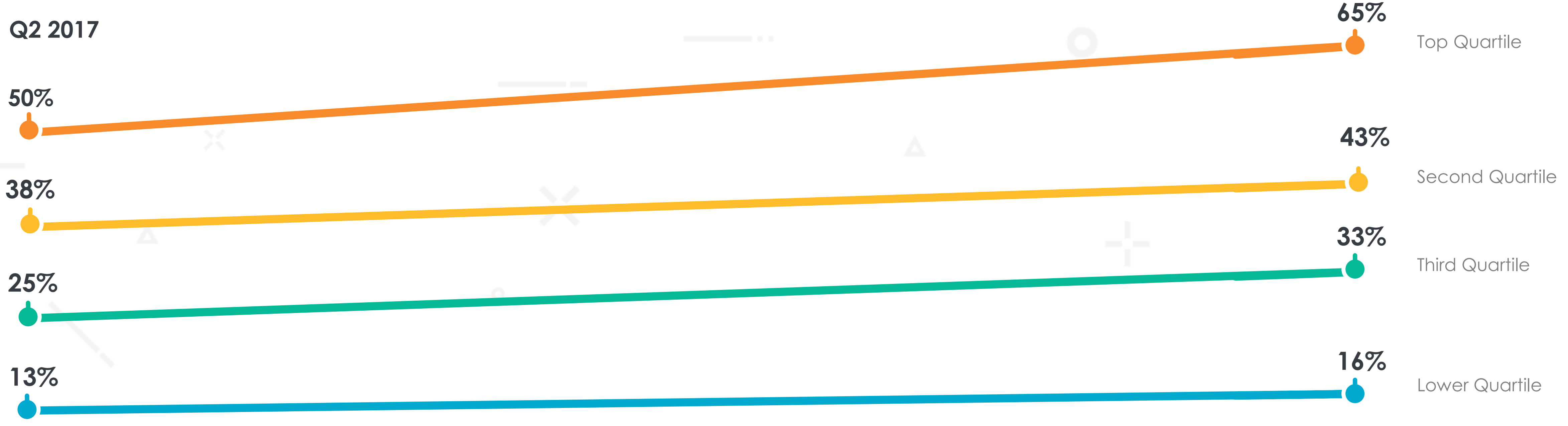
Source: Criteo, Worldwide, Q3 2018.

Base: Unweighted sales aggregate, retailers who promote their shopping app (see Methodology)

App Opportunity

Retailers who promote their shopping app see App transactions grow steadily

Share of App transactions by Quartile, Q2 2017 and Q2 2018



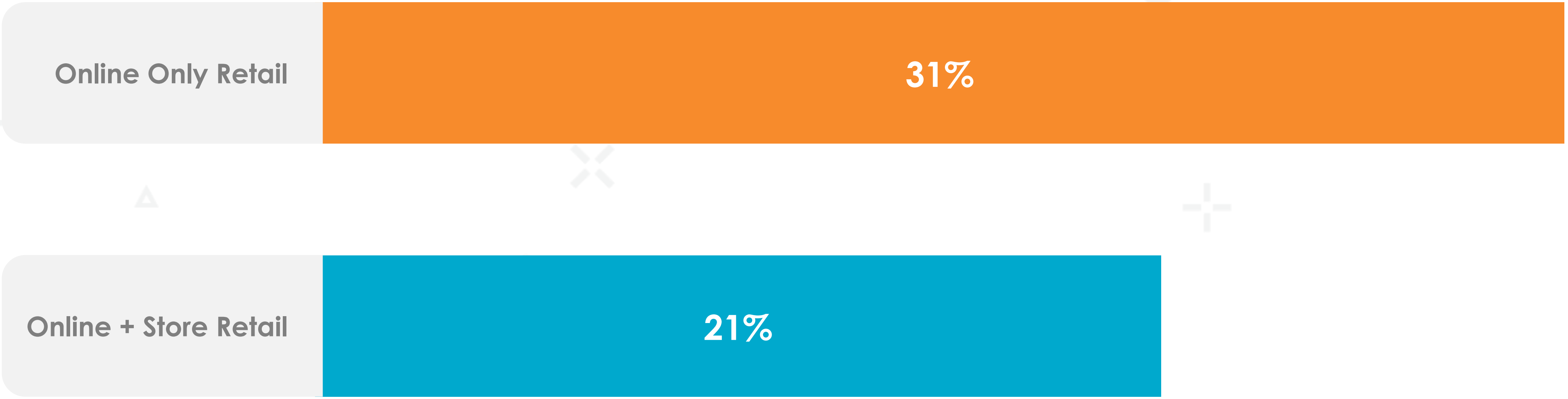
On a year over year basis, in-app share of transactions is increasing across all quartiles of app-promoting retailers.

Source: Criteo, Worldwide, 2018.

Base: Unweighted sales aggregate, retailers who promote their shopping app (see Methodology)

App Opportunity

"Pure players" who promote their shopping app see the highest share of App transactions



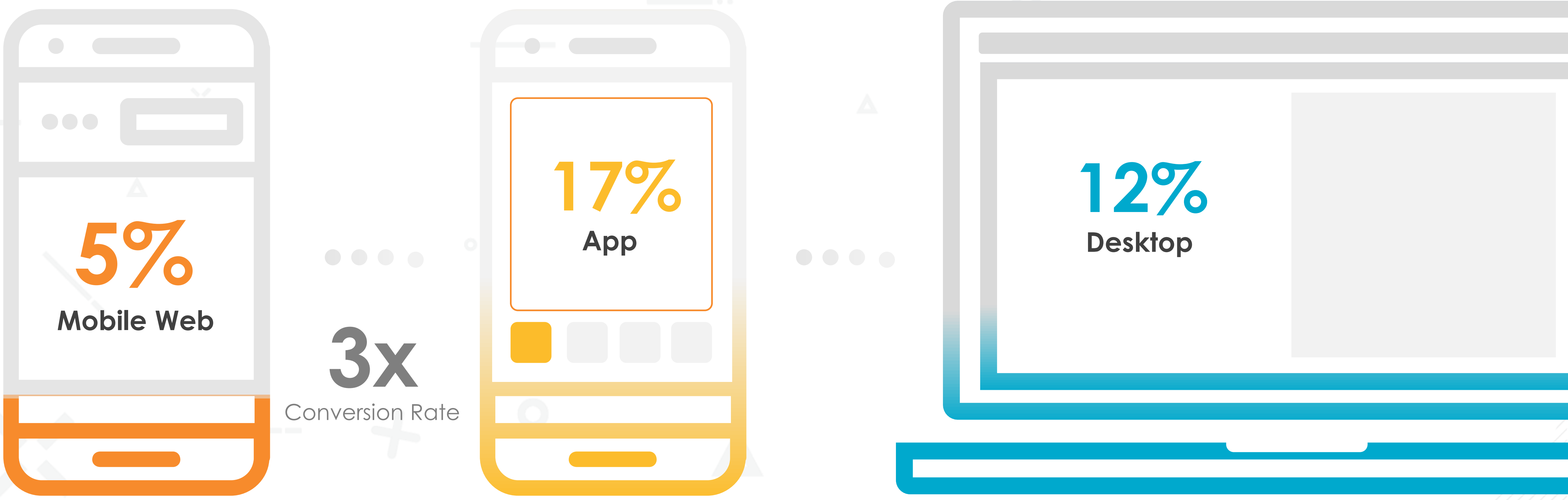
Source: Criteo, Worldwide, 2018.

Base: Unweighted sales aggregate, retailers who promote their shopping app (see Methodology)

App Opportunity

Shopping apps generate higher conversion rates.

In Europe, the conversion rate on shopping apps is more than 3 times higher than on mobile web.



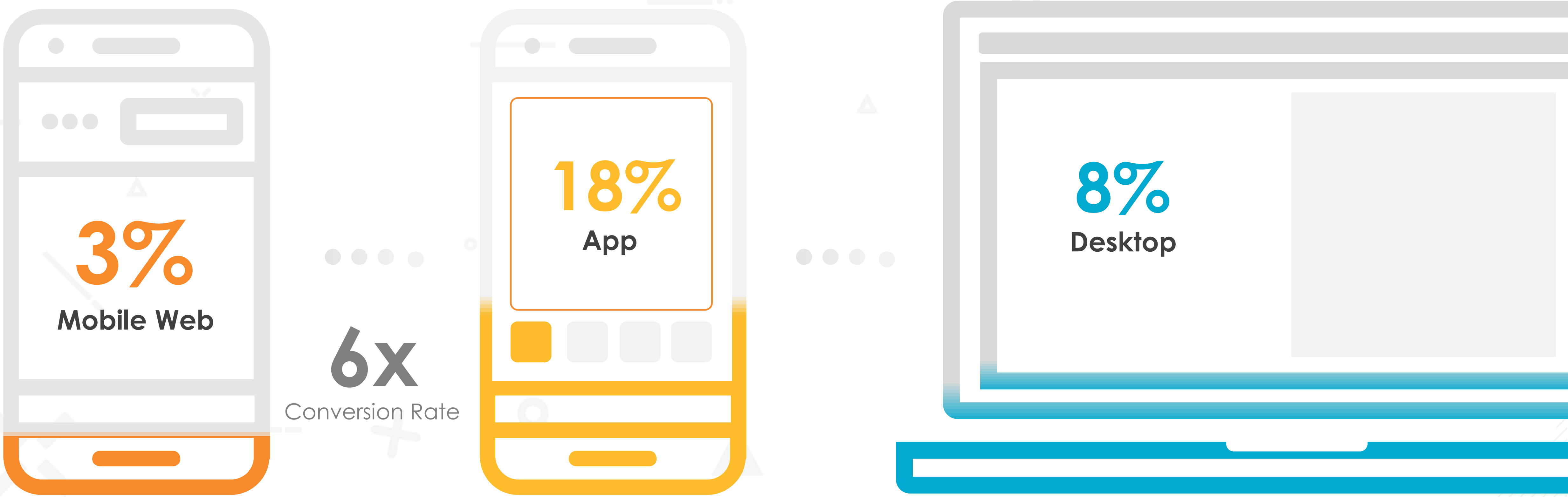
Source: Criteo, Europe, Q3 2018.

Base: Unweighted sales aggregate, retailers who promote their shopping app (see Methodology)

App Opportunity

Shopping apps generate higher conversion rates.

In MEA, the conversion rate on shopping apps is 6 times higher than on mobile web.

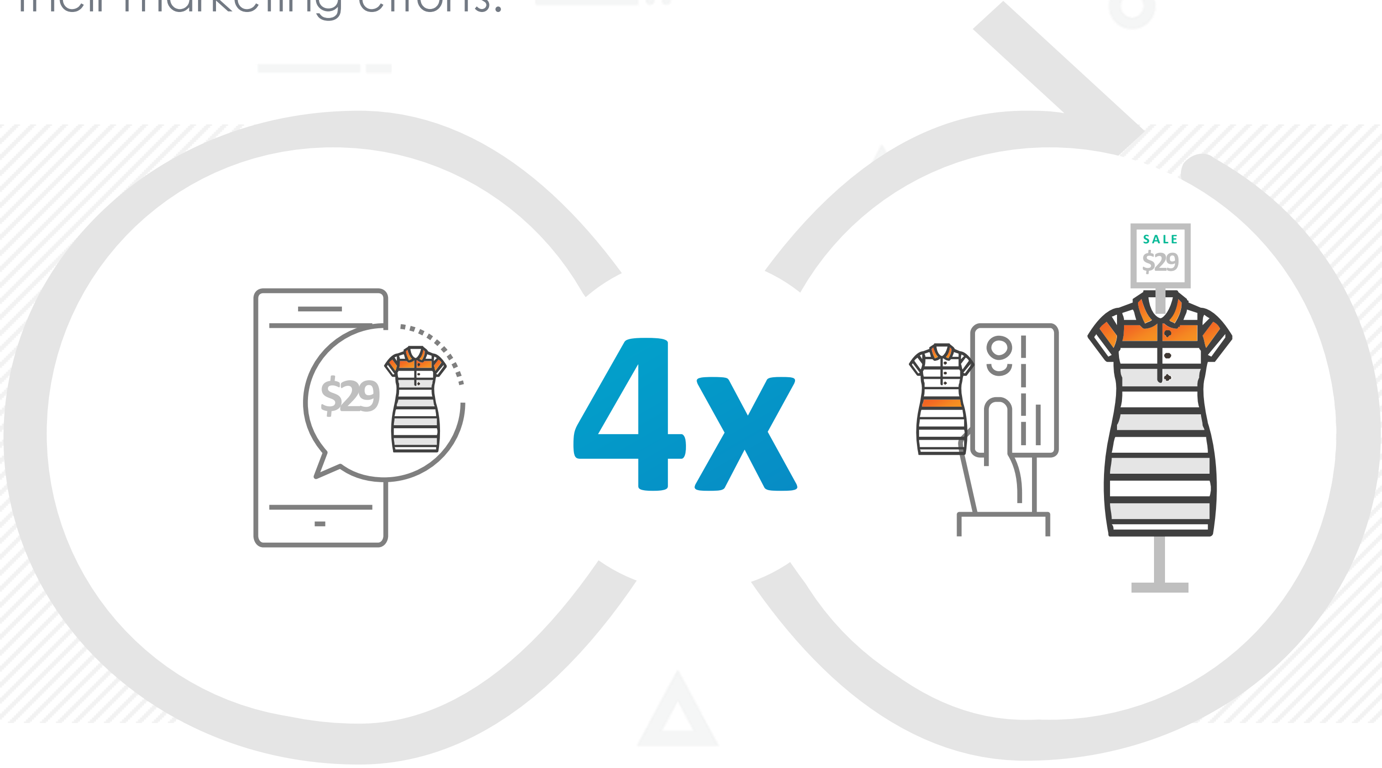


Source: Criteo, Middle East and Africa, Q3 2018. **Base:** Unweighted sales aggregate, retailers who promote their shopping app (see Methodology)

Omnichannel Matters

Offline sales boost shopper knowledge - and online results.

Omnichannel retailers that can combine their offline and online data can apply over four times as much sales data to optimize their marketing efforts.



Source: Criteo, United States, 2018.

Base: retailers combining online and offline sales data.

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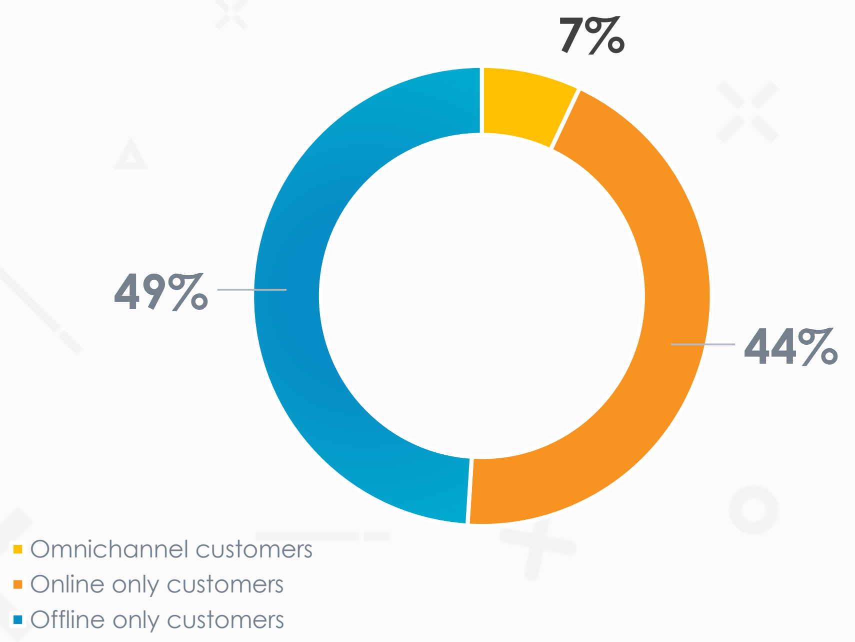
Omnichannel Matters

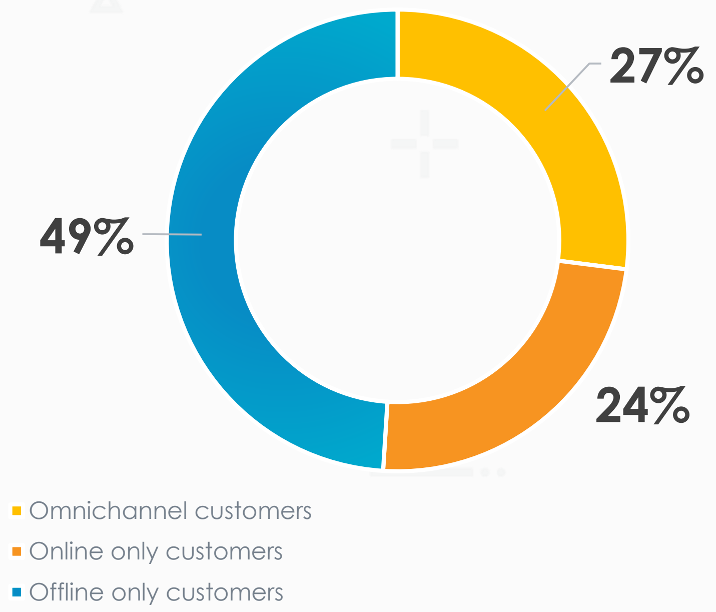
Omnichannel customers generate the highest lifetime value.

Omnichannel customers generate 27% of all sales, despite representing only 7% of all customers.

Share of Customers



Share of Sales



Source: Criteo, United States, 2018.

Base: retailers combining online and offline sales data.

Methodology

Individual browsing and purchasing data from over 5,000 retailers, in more than 80 countries. Q3 2018

Historically, Criteo has used a sales weighted approach since it has the potential to more closely approximate the true market number. We continue to use a sales-weighted approach when we think our data represents enough of the overall market to make this approach reasonable. When we have newer, emerging offerings – or cases where the distribution of usage is skewed towards a few clients – we report on an unweighted basis. The unweighted basis means that smaller clients have just as much input into the aggregate number as larger clients. Our Analytics and Insights team uses best professional judgment when determining which metric more accurately reflects our view of the underlying market trends.

Sales weighted: summary metric which is influenced by the volume of transactions generated by each retailer.
Sales unweighted: summary metric where all retailers contribute equally to the aggregate.

About Criteo

To learn more about how Criteo drives sales and profits for thousands of brands, retailers, and publishers worldwide, visit criteo.com/about

criteo.