



E-COMMERCE MARKET AND PERSPECTIVES FOR THE REVERSE COMMERCE

Michał Laskowski, Andrzej Poszewiecki

Summary

E-commerce has been evolving from being a purely niche phenomenon to owning a vital share in economies of developed countries. Growth of such distribution and sales channel has been highly correlated with technological improvements penetrating modern societies. Today we stand in front of new ideas, adoption barriers and profit opportunities. There are a few trends ready to take off in the near future, one of them is the idea of reverse e-commerce, which is engaging the consumer even more into a highly personalized buying process. Nevertheless, every new idea needs the suitable time and place to launch. The purpose of this analysis is to verify prospects for the reverse e-commerce, which has a huge market potential. Reverse e-Commerce has every chance of becoming a new, still undiscovered now, marketing channel.

Keywords: e-commerce, reverse e-commerce, e-business, new business model, price comparison websites

Introduction

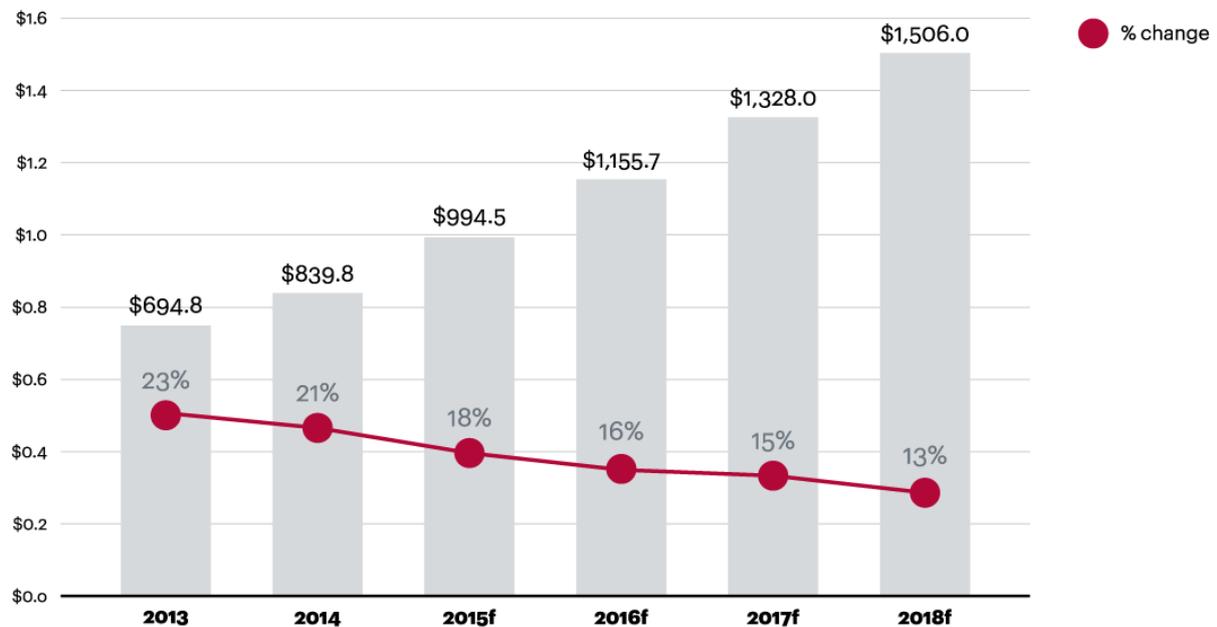
E-commerce has been growing for a number years easily hitting double digit growth rates. While it is normal for small numbers to grow at a fast rate of even over 15% a year, once they become mature, growth rate decline. E-commerce in most countries is now a mature business model and an everyday way of shopping for most of people in modern societies. In order to analyze e-commerce we must first verify the market size.

1. E-commerce market size

Year 2014 saw another imposing sales increase within the global e-commerce market up to 840 billion US Dollars, i.e. by over 20%¹. This growth was primarily caused by the widening

¹AT Kerney (2015), *The 2015 Global Retail E-Commerce Index*,
[<https://www.atkearney.com/documents/10192/5691153/global+retail+e-commerce+keeps+on+clicking.pdf/abe38776-2669-47ba-9387-5d1653e40409>], (1.09.2015)

net availability in geographical terms and the development (transformation) having the traditional sales network turn to internet sales. The major event was the record hitting Alibaba IPO (initial Public Offering) reaching the level of 25 billion US Dollars, which was eventually estimated at a total of 170 billion US Dollars.



Picture 1. Global e-commerce sales

Source: Global Retail E-Commerce Keeps on Clicking, https://www.atkearney.com/consumer-products-retail/e-commerce-index/full-report/-/asset_publisher/87xbENNHPZ3D/content/global-retail-e-commerce-keeps-on-clicking/10192?_101_INSTANCE_87xbENNHPZ3D_redirect=%2Fconsumer-products-retail%2Fe-commerce-index

According to Euromonitor data, this rise will continue reaching the two-digit figures until minimum 2018 where the e-commerce market value is supposed to hit over 1500 billion US Dollars in sales². The European market has also been noting a standing rise in e-commerce sales figures. The Internet Retailer „2015 Europe 500” report which puts together the results of 500 major internet sellers in Europe, shows that the Old Continent has reached the second best result after China in e-commerce sales reaching the total of US\$ 410.97 billion along with annual increase of 16%. For comparison purposes, it is worth saying that the China e-commerce market has been estimated at 449.12 US\$ billion against 304.91 US\$ billion in the USA (third major region)³.

The eMarketer reports quote even bigger values concerning the e-commerce sales. According to their data, the figures went over 1500 US\$ billion already in 2014. This seems to be in line with the results published by Euromonitor. And the market increase rates shown in the eMarketer and Euromonitor are fairly at the same level⁴.

Nevertheless, the e-commerce market is facing standing growth all the time. The report by the U.S. Census Bureau states that the e-commerce sales in the United States makes as little as

² Ibidem

³ Internet Retailer (2015), *2015 Europe 500*, [<https://www.internetretailer.com/2015/06/09/europe-500-merchants-look-cross-border-e-commerce-opportunities>], (1.09.2015)

⁴ eMarketer (2014), *Retail Sales Worldwide Will Top \$22 Trillion This Year*, [<http://www.emarketer.com/article/retail-sales-worldwide-will-top-22-trillion-this-year/1011765>] (1.09.2015)

7% of the total of retail sales⁵. This indicates the internet sales make still a niche business promising a success for the new activity models.

The e-commerce market size – it is difficult to give an exact figure by identifying the number of entities making up this market due to the fairly low entry barriers and no tools to monitor them in the network. As the RJMetrics research show, there are over 110 thousand e-commerce based income generating internet sites. Among the 100 thousand most popular ones, 12% are just e-commerce outlets. Similar research gives an estimate of 10-12% that make the e-commerce businesses within all websites. This data was achieved by applying the e-commerce tools tracking algorithms (such as “my shopping basket” bookmarks) and Alexa ranking.

	Alexa Rank	% of Total Ecommerce Businesses	% of Total Revenue
Top	1-10k	1%	34%
Mid	10-500k	51%	63%
Bottom	500k-1M	48%	3%

Picture 2. Mid-market ecommerce companies generate a ton of revenue

Source: RJMetrics, [https://blog.rjmetrics.com/2014/06/18/how-many-ecommerce-companies-are-there/\(1.09.2015\)](https://blog.rjmetrics.com/2014/06/18/how-many-ecommerce-companies-are-there/(1.09.2015))

The vital piece of information which emerged as a result of the study run by RJMetrics is the distribution of income in terms of e-commerce size. The biggest income is generated by the middle section in the Alexa ranking. It makes 51% of the e-commerce market while generating 63% of sales. This is quite crucial because despite their huge turnovers, the biggest players in the e-commerce market (1% of the websites generating 34% sales) are still behind the winners. This points to the decentralized nature of the business and the addiction of the customers to specific sellers⁶. Such a big number of sellers makes another argument for the need to create tools which would facilitate the Internet monitoring for customers.

A still bigger number of entities is quoted by Ecommerce Foundation, in their „European B2C E-commerce Report 2015” where they estimate the e-commerce sites to count over 750 thousand. The same report noted about 4 billion shipments generated by e-commerce annually⁷.

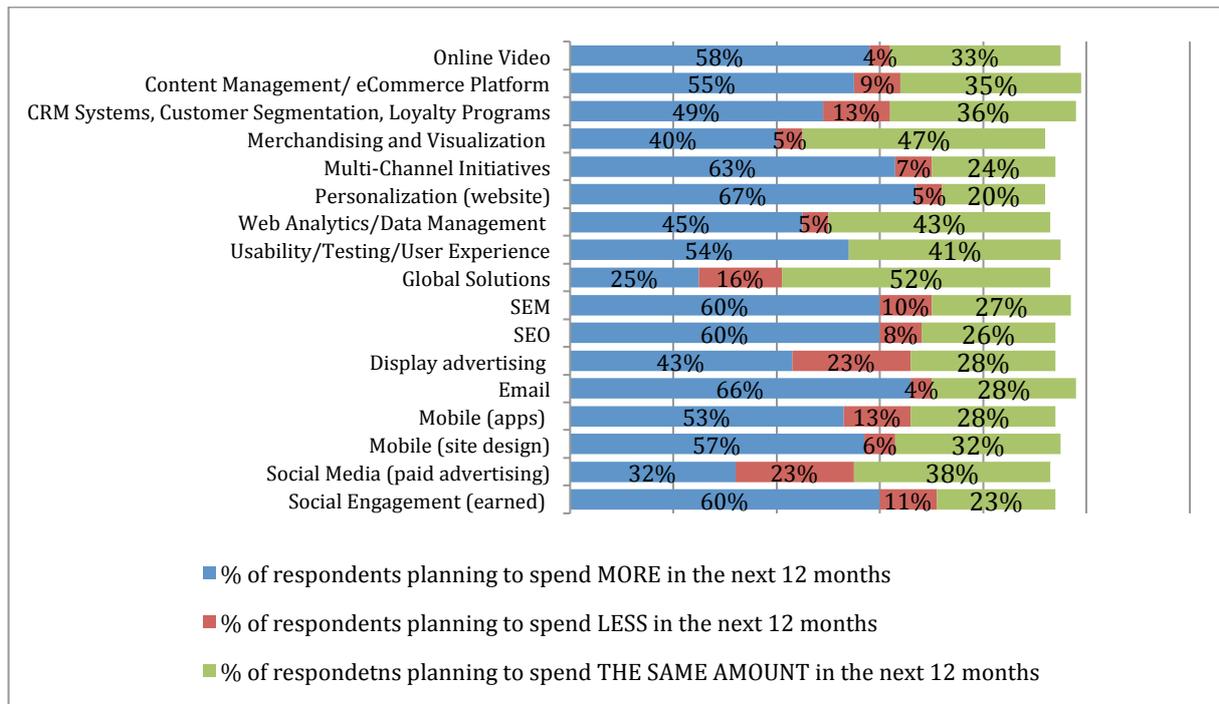
The data by International Data Company (IDC) show that in 2013 the product and big data services markets went up to reach over 100 billion US\$. Over 12-24 months, 46% entities started using the new methods of data analysis, 41% new efficiency index and 27% started to look for new data types⁸. According to IDC, this market will have hit 125 billion US\$ in 2015.

⁵U.S. Census Bureau (2015), *Quarterly Retail E-commerce Sales*, [www.census.gov/retail/mrts/www/data/pdf/ec_current.pdf], (1.09.2015)

⁶RJMetrics (2014), *How Many Ecommerce Companies Are There?*, [<https://blog.rjmetrics.com/2014/06/18/how-many-ecommerce-companies-are-there/>], (1.09.2015)

⁷Ecommerce Foundation (2015), *European B2C E-commerce Report 2015*

⁸IDC (2014), *Big Data in the Enterprise: When Worlds Collide*, [www.oracle.com/us/corporate/analystreports/corporate/idc-when-worlds-collide-2193862.pdf], (1.09.2015)

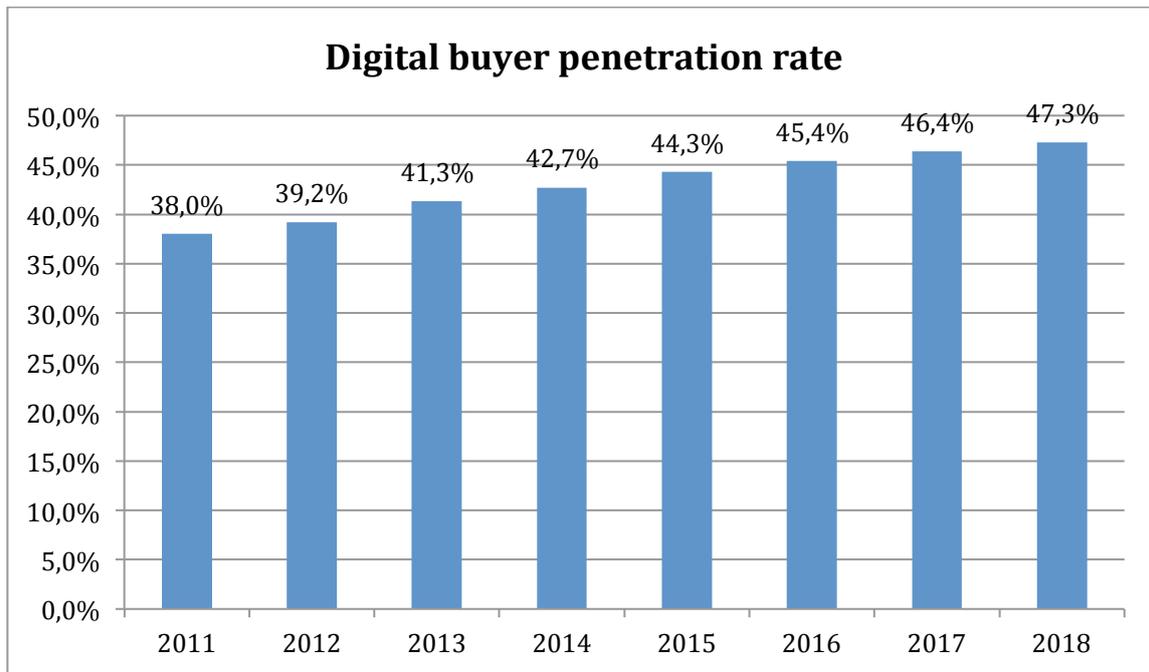


Picture 3. Retail Technology Spending – planning to spend budget in each area in the next 12 months

Source: https://cdn2.content.compendiumblog.com/uploads/user/10de84bd-0a35-4f29-a053-88b2268a231b/fe49a9a-812b-45cf-8f3e-ab3d795690e8/File/e02f367b339dd76fc403a5ea8aaca9bc/etailpalmspringsbenchmark_att.pdf (1.09.2015)

According to the „2013 Retail Technology Spending Report” in 2013, as many as 45% shops were planning an increase in their budgets to spend on the network analysis and data management confronted with only 5% that were going to cut on that budget. Such decisions are mostly taken based on the ROI index -31% , and as deemed by the managements -25% ⁹. The above data indicates the fact that also the internet businessmen are in constant need of tools capable of market, customer and competition monitoring.

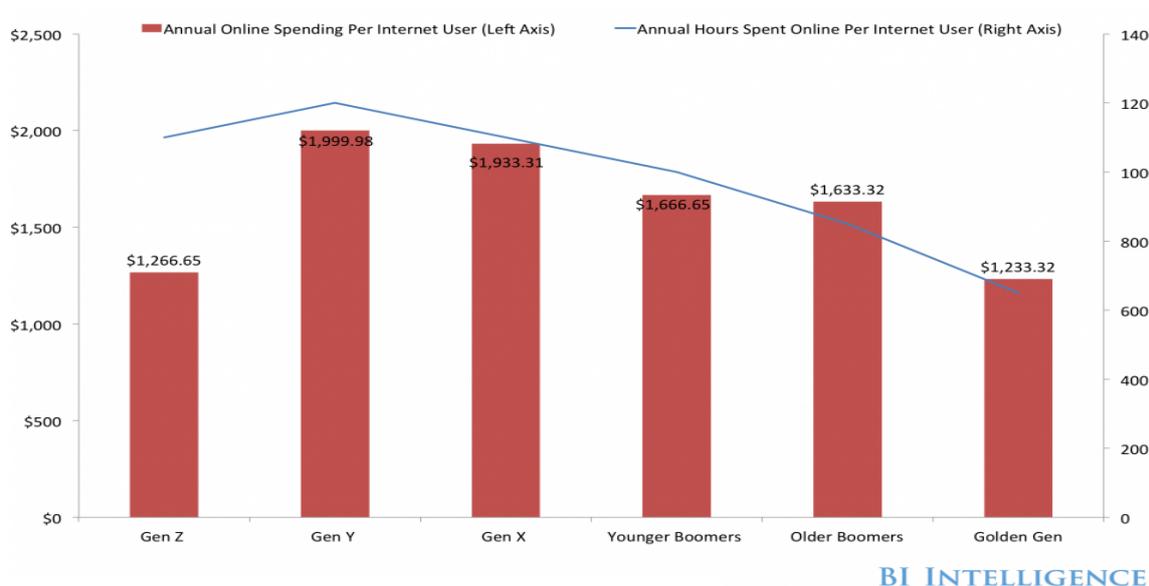
⁹eTail (2013), *2013 Retail Technology Spending Report*



Picture 4. Who shops in the Internet, and how

Source: Statista 2015, <http://www.statista.com/statistics/261676/digital-buyer-penetration-worldwide/>

The year 2011 saw 792,6 million Internet shoppers. Over the subsequent year, the number rose to 903,6 million. 1.32 billion is estimated for the year 2016. And what is more, there is still a huge potential ahead of the e-commerce sales in terms of the users and online shoppers because the network penetration has not yet arrived at the 50% level. In practical terms, this means the number of buyers over Internet might double¹⁰.



Picture 5. Time and Money Spent Online Annually, by Age Group (US, 2013)

Source: <http://www.businessinsider.com/the-surprising-demographics-of-who-shops-online-and-on-mobile-2014-6> (1.09.2015)

¹⁰ Statista (2015), *Digital buyer penetration worldwide from 2011 to 2018*, [<http://www.statista.com/statistics/261676/digital-buyer-penetration-worldwide/>] (1.09.2015)

It is the Y Generation users (born 1980-2000) who mostly spend their money in the net despite their lower income. The X Generation falls to the second position (born 1960-1980). This data was surveyed in 2013 for the sake of the BI Intelligence report within the US. As this report wants it, despite a general trend, the online expenditure is evenly distributed between females and males (with a slightly bigger number among females). In 2013, it was 57% female shoppers buying online in the US as confronted with 52% males. Yet, at the same time, it is the males that are more likely to use mobile devices while doing shopping (22% males vs 18% females). 55% of the customers came from households with salaries higher than average¹¹.

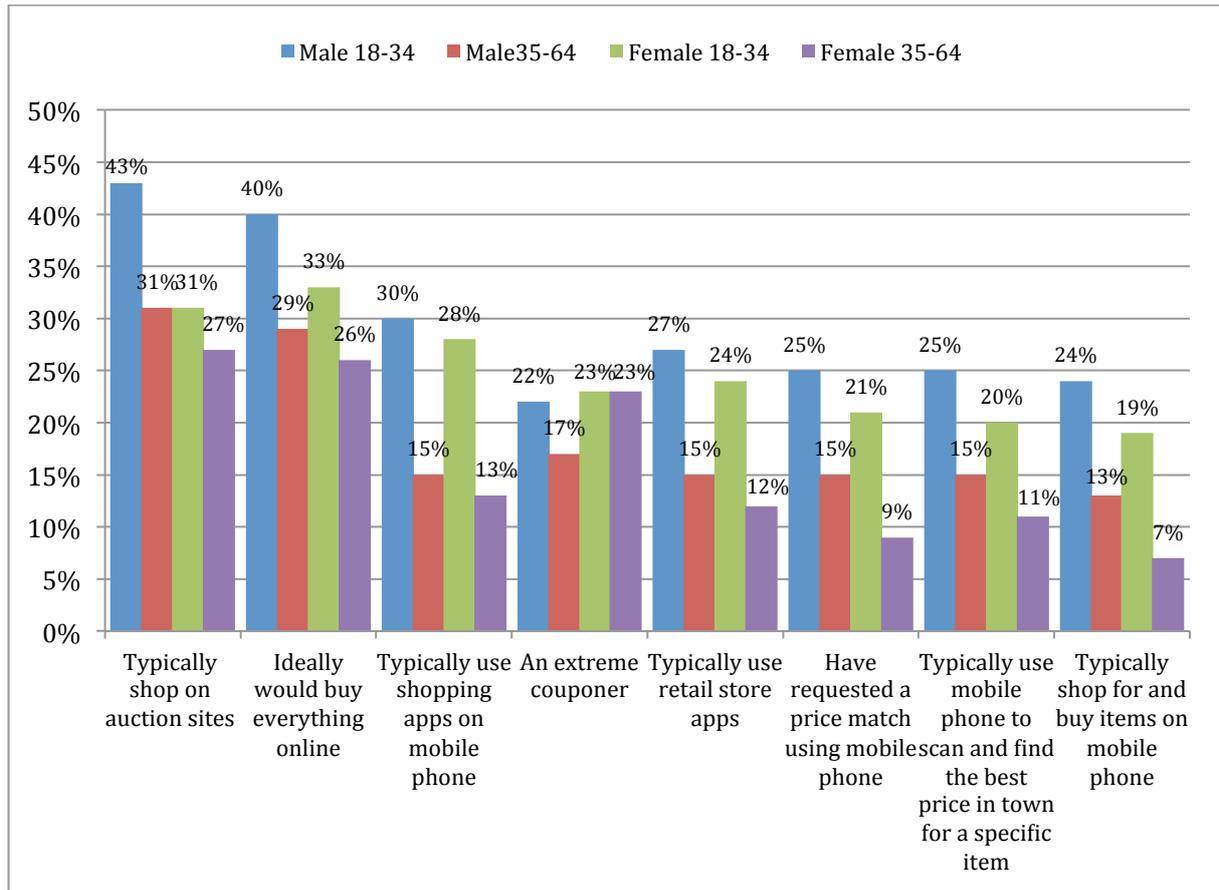
According to 2014 Content Square survey, women are quicker to buy online and spend more time browsing internet outlets. They click in the online stores by 30% more frequently and 10% faster than men. Ladies visit by 12 % sites more and buy by 7% quicker than men. The respective research results show that while shopping online, ladies are much more attracted by pictures of the products than men who are more focused on the product description¹². Having this in mind, and knowing the importance of female e-shoppers, it is advisable to design such tools for online stores which operate images.

In their e-commerce related benchmark series, the RJMetrics have evaluated their customers for 154 US\$ spent within the first year of their interaction with an on-line shop. 69% customers spend their money in one shop the first year within a maximum of 30 days of their registration and only 32 % customers order products for a second time within the same year¹³. These results show that it is difficult to attract and keep the customers using the traditional e-commerce solutions. Hence so many sales channels: the simplest example is placing the offers on such selling agent sites as Amazon or eBay.

¹¹BI Intelligence (2013), *The surprising demographics of e-commerce and mobile shoppers in the us*, [https://intelligence.businessinsider.com/welcome?utm_source=house&utm_medium=edit&utm_term=e-demos-6-12-14&utm_content=link&utm_campaign=biimobile], (1.09.2015)

¹²Content Square (2014), *E-Commerce and behavioural differences*, (1.09.2015)

¹³RJMetrics (2015), *2015 Benchmark Raport Series: E-commerce Buyers Behavior*, [<https://rjmetrics.com/resources/reports/ecommerce-buyer-behavior>], (1.09.2015)

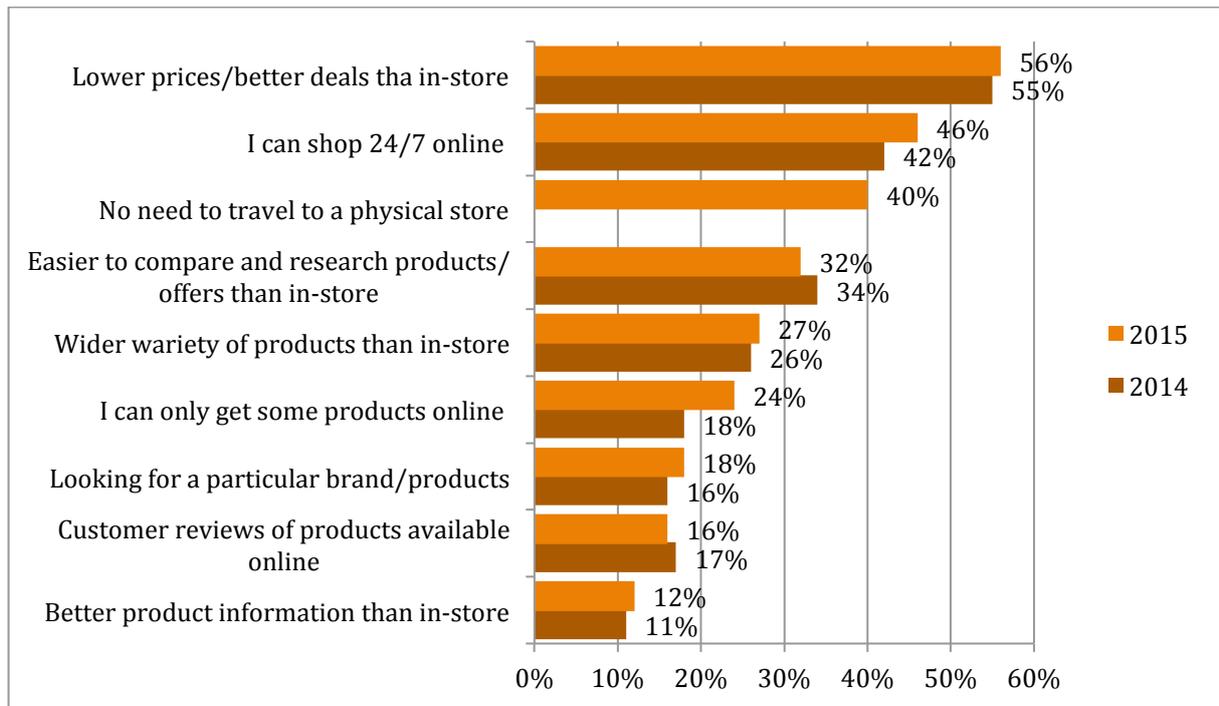


Picture 6. American Attitudes Toward E-Commerce, January 2013

Source: <http://www.statista.com/statistics/298591/attitudes-towards-e-commerce-among-us-gen-x/> (1.09.2015)

The BI Intelligence research shows that it is the men between 18 and 34 who are the most common Internet shoppers. As many as 40% within this group declare being ready to buy everything online. 25% within this group use mobile devices to match the prices and to compare the stock in their towns. The second largest group are women between 18 and 34¹⁴.

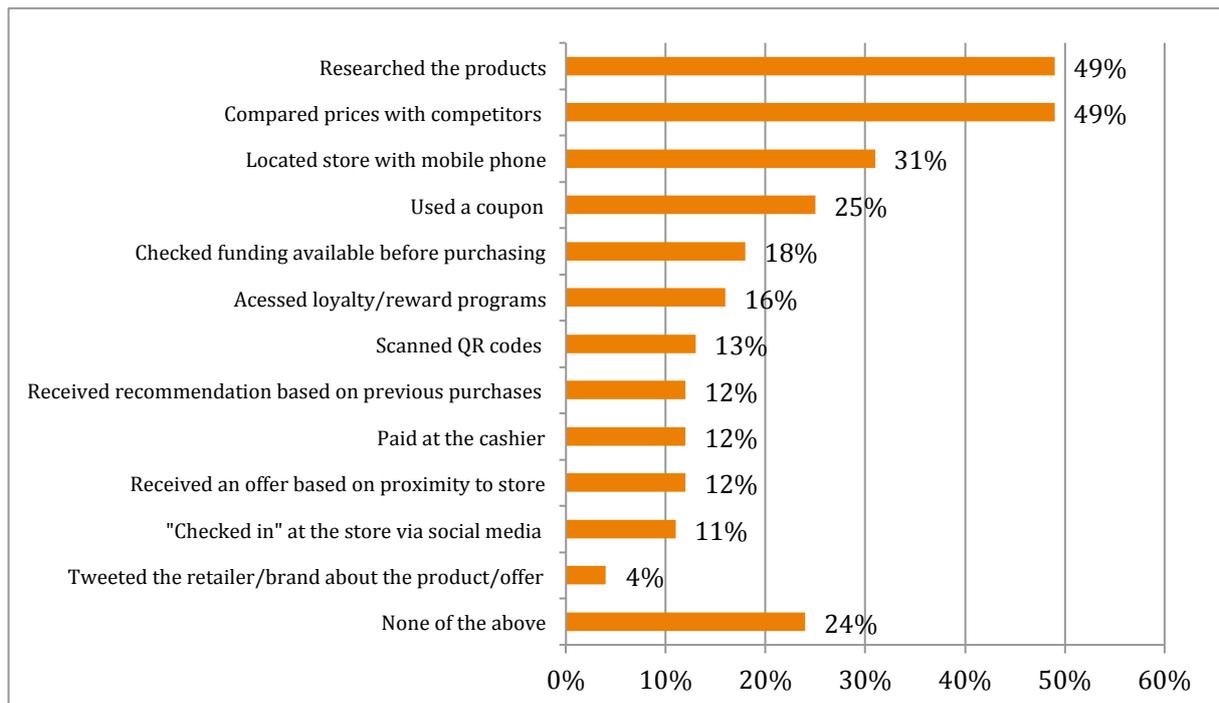
¹⁴ BI Intelligence (2013), *The surprising demographics of e-commerce and mobile shoppers in the us*, [https://intelligence.businessinsider.com/welcome?utm_source=house&utm_medium=edit&utm_term=e-demos-6-12-14&utm_content=link&utm_campaign=biimobile], (1.09.2015)



Picture 7. Why do you buy products online instead of a stores?

Source: Global PwC 2015 Total Retail Survey

The survey done by PwC shows that the most common reason for online shopping is the lower price (56%), a 24-hour accessibility (46%) and no need to drive to a store (40%). The least important reason was the search for a specific product/brand (18%), product reviews available in the web (16%) or more information on the product (12%).



Picture 8. Which of the following have you done using your mobile/smartphone/tablet/PC?

Source: Global PwC 2015 Total Retail Survey, (1.09.2015)

Mobile devices are most often used by the customers to find information about the products and to compare prices (49% respectively)¹⁵. This drives to the conclusion that it is the price **which makes the most crucial factor among consumers**. Product information searching and price matching has become much easier than ever before owing to the universal access to the network through the mobile devices and for this reason all entities operating within the e-commerce market must look for ways of using this trend to boost their results.

Men between 18 and 35 make the largest group among the retail shoppers online, yet recently every age group, regardless of the sex, has increasingly been using the web purchase opportunities. Moreover, many studies show that owing to the intuitive tools and advancing digitalisation, the age border is getting irrelevant.

2. PriceComparisonWebsites (PCWs)

The PCWs has become a very popular form of price and offer check. According to a study by RS Consulting as many as 56% consumers online have declared their using the PCWs of whom 52% have been buying directly from the comparison websites or using the reference links. **The most frequent reasons for using the PCWs are looking for promotions (85%), price matching (83%), saving on expenses (79%) and the need to identify the provider of a given product (69%)**¹⁶.

The major PWCs tailored to the needs of European retail shoppers are the following:

- [Kelkoo](#) – after Amazon and eBay, the largest e-commerce service in Europe;
- [Pricegrabber](#) – a very popular price comparing site;
- [Pricerunner](#) – popular price comparing site;
- [Google Shopping](#) – Google run price comparing site based on the algorithms of the most popular PWC;
- [Shopzilla i Bizrate](#) - Shopzilla is a platform connecting millions of users to thousands of providers which uses the Bizrate feedback system;
- [Shopping.com](#) – a company of eBay group; compares prices and displays the auction service users reviews.

Simultaneously, a discussion has been going on for the recent years disputing the harmful effect of the price comparison sites. They are very popular with customers but, on other hand, they operate on the basis of commission on sales when using the reference links. Aware of the PCWs importance, the sellers include the provision in the product price. Research findings want it that product prices in the shops that use the PCWs are higher than in the independent stores. On the other hand, however, the PCWs offer the so called sponsored promotions or product highlight regardless of its price – this might be misleading to the users¹⁷.

The above data suggest that there is also a way to come up with a solution which makes an opportunity to reach a customer other than through the PCWs which have so far taken the oligopolistic position in the market.

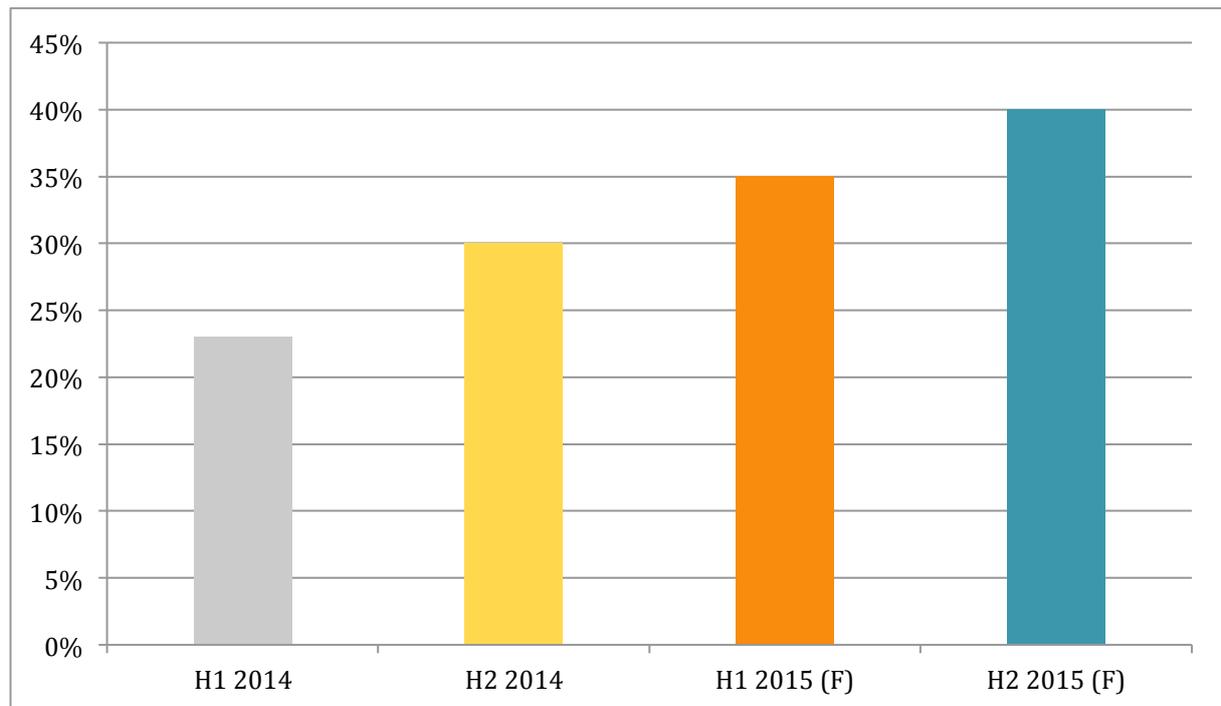
¹⁵ PwC (2015), *Global PwC 2015 Total Retail Survey*, (1.09.2015)

¹⁶ RS Consulting (2014), *Price comparison websites: consumer perceptions and experiences*, (1.09.2015)

¹⁷ D. Ronayne (2015), *Price Comparison Websites*, University of Warwick, [www2.warwick.ac.uk/fac/soc/economics/research/workingpapers/2015/twerp_1056b_ronayne.pdf], (1.09.2015)

3. E-commerce market trends

#1 Mobile Commerce



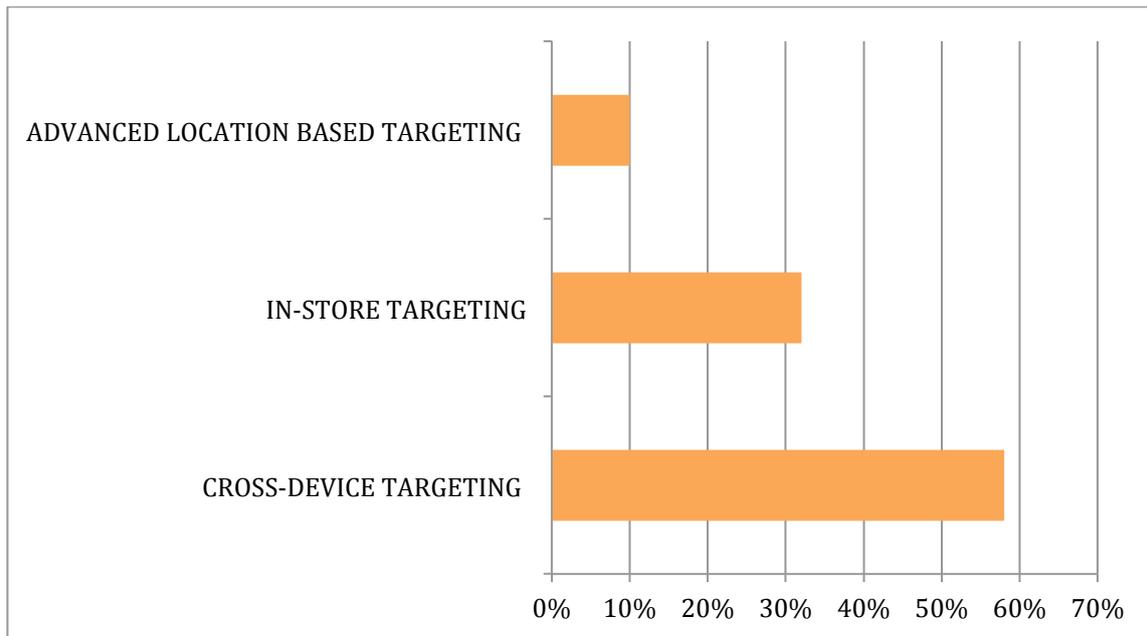
Picture 9. Mobile % of Global eCommerce Transactions

Source: Criteo, <http://www.criteo.com/pl/resources/criteo-e-commerce-industry-outlook-2015/>

For the several recent years mobile commerce has shown the growing tendency, i.e. the transactions done with the use of mobile devices. As Criteo have found, year 2015 will have shown a global 40% rise in mobile commerce market. At the same time, it has been estimated that the developed markets will have their 50% share of mobile commerce in online shopping¹⁸.

¹⁸Criteo (2015), *eCommerce Industry Outlook 2015*, [www.criteo.com/media/1432/criteo-e-commerce-industry-outlook-2015.pdf], (1.09.2015)

#2 Multichannelsales

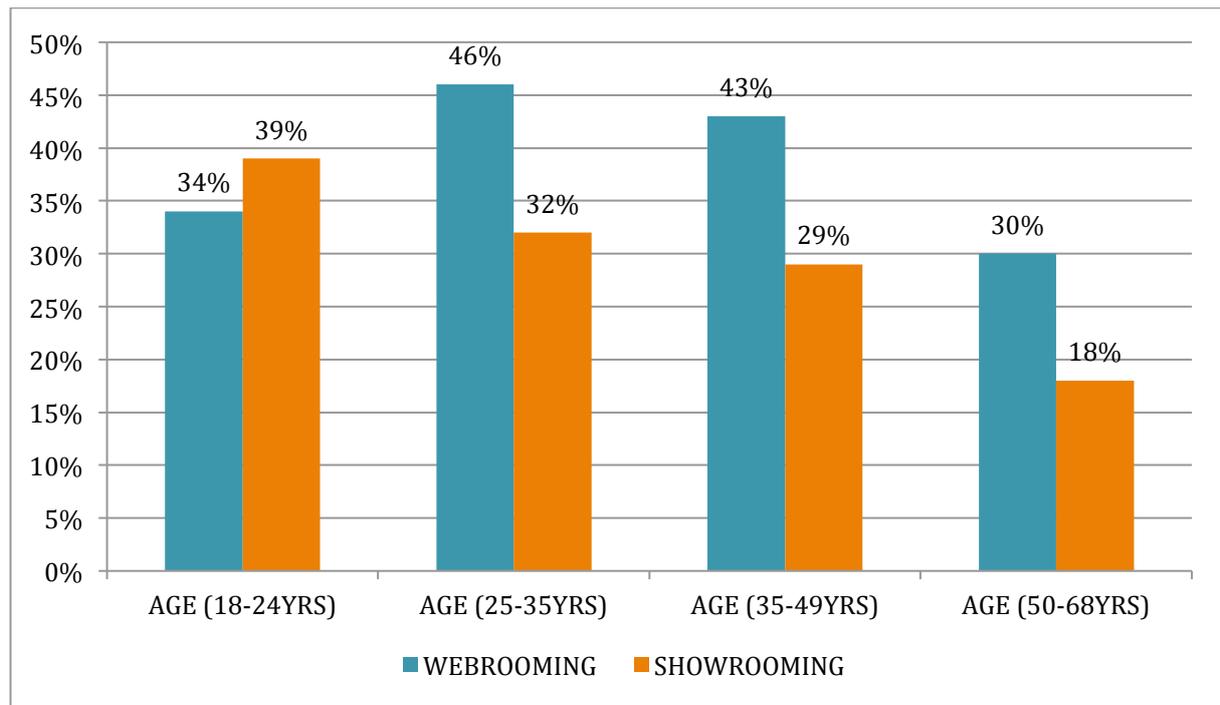


Picture 10. What would you like most for mobile marketing efforts?

Source: Digiday and Criteo survey of retail executives and ad agencies, July 2014

The growing fondness of mobile devices triggers a rise in cross-transactions as per various devices. The customers are becoming more used to use mobile devices to find information on the products and compare the prices but eventually they buy goods on their PCs or laptops. This kind of purchase reaches the level of 15-20% of the total online shopping. The latest name of this trend is Omnichannel Commerce. Google's data find this sales form as dominating maintaining that about 85% of the customers start the transaction process on one device and complete it on another one.

#3 Combining traditional shopping with the internet commerce



Picture 11. Webrooming and Showrooming by Shoppers in the US

Source: GFK Futurebuy Shopping Study, October 2014

The Omnichannel Commerce mode also points to an increase in the importance of the traditional and internet sales combination. It refers to two phenomena in particular: webrooming – online product information checking followed by a purchase from a traditional stationary store, and showrooming – physically checking the product in a traditional store and then buying online. Webrooming has become particularly popular in the US – as many as 46% consumers aged 25-35 use this option. This has triggered two development tracks: firstly, the traditional shops provide their customers with free wi-fi and the opportunity of using brand mobile devices and secondly, the internet shops are starting to open their traditionally real stores as showrooms¹⁹.

#4 Personalization

In 2015, the consumers have been well aware of being tracked in the web. They do not mind it provided the content matches well their needs. The Mojn marketing agency has compiled the statistics which support the content personalization trend in e-commerce²⁰:

- 75% of consumers like the personalized stock offer (source: Aberdeen Group)
- 61% of consumers are ready to sacrifice their privacy for the sake of personalized offer (source: Monetate);
- 56% of consumers declare they would be more likely to buy if the seller came up with a personalized offer (source: O2);
- 74% of consumers are frustrated by not finding websites matching their interests (source: Janrain& Harris Interactive);

¹⁹Criteo (2015), *eCommerce Industry Outlook 2015*, [www.criteo.com/media/1432/criteo-ecommerce-industry-outlook-2015.pdf], (1.09.2015)

²⁰Mojn (2014), *Importance Of E-Commerce Personalization*, [http://blog.mojn.com/ecommerce-personalization-stats/], (1.09.2015)

- 94% agree personalization will make a key success factor in future (source: Econsultancy).

The data quoted above shows it clearly that despite alarming opinions concerning the customers' privacy in the web, they are not real in practical terms as the customers seem to value their convenience more than personal data protection.

4. Reverse e-Commerce - two approaches: B2B & B2C

The concept of Reverse e-Commerce includes two market relations: B2B (business to business) and B2C (business to consumer). In the first case, the commerce reverse involves including in the offer a product which physically does not exist on stock. This certainly creates the risk of non-delivery of the product and obviously dissatisfaction of the customer. Yet, this is a very common practice on the part of in online shops which quite intentionally keep the stock of only fast-rotating products.

The B2B type of Reverse e-Commerce has long been operating in the market and it seems a no-return road. The B2C approach within the Reverse e-Commerce is founded on the idea that it is the customer who will call for a purchase. This is totally different to the traditional model where the supply comes before demand. In the Reverse e-Commerce model it is the demand which creates supply and, still more importantly, demand initiates the transactions.

A question arises asking the way of combining the demand call with the market supply. Such internet services as pikaba.com and wishpot.com have attempted to give an answer. These services were created in about 2007 and have been modestly popular in the market. This creates another question: what are the reasons for this situation and whether now there is chance for better operation of such activity model.

The following difficulties in promoting this concept of reverse e-Commerce by on-line application have been identified:

- the necessity to build up a large users movement to make the service viable;
- encouraging the users to place wishlists;
- offering measurable financial advantages to users for visiting the platform.

By far the biggest problem in the Reverse e-Commerce model is to build up a movement of loyal recurring users. The task seems more difficult given the existence of shopping portals, such as auctions, online stores, price comparing services, opinions, announcements or reviews. Thus the cost of promoting yet another player is very high.

An attempt to create a new category of services such as Reverse e-Commerce obviously is a risky task. However, in our opinion there is a big potential embedded in this solution we are suggesting –it must only be positioned in a proper way. A good approach to the suggestion of implementing a new model is the use of already existing mobility and brands.

The idea of coming up with a tool for Reversed e-Commerce system will prove its applicability as a platform integrating demand with supply within already existing shopping services. Users are reluctant to log on in an unknown platform only to add a product out of their wishlist. The product marking must be done where the consumer is in touch with it, i.e. in a blog, a store, price comparing engine, auction or vertical portal. The function of the “likes” is of similar nature; the button is pressed when the service is liked, not within the facebook application. The way of announcing the users' demand could be based on this system. This method solves the problem of building up a totally new traffic within unknown internet service. There are many internet services interested in providing and receiving information on users' wishes (see below).

Table 1. Demand / Supply chain in Reverse e-Commerce

Demand announcing	Used by supply
<ul style="list-style-type: none"> – applications for purchase lists forming; – applications for creating gift wishes (wedding etc.); – clicking “like” for a given product within the facebook system; – “pin” marking within given product’s pinterest system; – clicking “buy later” in online store or price matching service; – clicking “observe” to an article of the product / product group 	<ul style="list-style-type: none"> – internet stores; – auction services; – proce matching services; – services; – on-line services.

Source: own study

The process of combining the supply and demand ends must be done with use of an API (Application Programming Interface), i.e. the services supplying the data wholesalers with demand information will be able to do so by simply placing an easy snippet on the website. Whereas the supply services will be sending questions to the databases concerning the announced needs for their products or related products. Thus, it is the supply party that must be burdened by the system maintaining expense. **There is a huge market potential waiting to use this kind of tool. Reverse e-Commerce has every chance of becoming a new, still undiscovered now, marketing channel.**

The now popular social media went a similar way starting with much scepticism in terms of their usage for business purposes only to become fully competent commercial channels. Earlier quoted analysis mentioned that the e-commerce market in the developed and developing countries is on a well mature level with a stable increase rate of up to dozen percent. The internet store and service platform users have gone a long way starting with the initial lack of trust in online purchase to holding bank accounts online and paying via internet even for groceries. The market is fully ready for new innovations on condition they will offer very measurable financial gains. The Reverse e-Commerce is of undisputable advantage to the supply sector. In Poland, within the standard e-Commerce model, the conversion rate is roughly 1.8%, thus there is no doubt about it being over 5% threshold when applying the Reverse e-Commerce system²¹.

There are technological conditions to implement the internet services integration with the API. Just to give but one example: the Polish padadoo start-up for „product labelling” that has come up with a very interesting solution implementing a system enabling putting product labels to photographs (see the picture below). The system makes it possible to view a stylised product in a picture and an option to go on to the purchase phase. The idea of diverting from the model of “likes” clicked on a single site / image to adding an unlimited number of markings to one picture or sister website.

²¹ Karwatka T., Sadulski D., E-commerce proste odpowiedzi na trudne pytania, Wolters Kluwer business, Warszawa 2011, s. 74. [Ecommerce-simple answers to difficult questions]



Picture 12. Pikadoo, example of creative product tagging

Source: Pikadoo

Owing to smartphones becoming hugely popular, the society are discovering the opportunities of using the technologies in an everyday life. Every day the users use not one but many mobile applications on their phones or in the internet browsers. To name the mostly visited sites: banks, social media, news, weather, games, fitness etc. The applications gather the information on many aspects of life. Inserting wishlists is nothing new; the users will not see it as a big barrier to entering such functionality.

These two factors will determine the success of implementing the Reverse e-Commerce system:

1. Establishing partnerships with the major e-commerce services in order to acquire information on demand and to resell the supply information.
2. Offering the customers very clear advantages – very favourable purchase transactions.

Conclusion

Reverse commerce is another unexplored opportunity for ecommerce entrepreneurs. Today it seems the market is ready for reintroduction of this idea. It holds a strong business model, being beneficial for both the consumer and seller. Like in any business a minimum threshold is required for this concept to launch on the market. Creating a reverse commerce platform to enable easy implementation for already existing ecommerce intermediaries could be a solution to this problem. This would be an innovative approach to launching this idea to a wider audience.

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RYNEK E-COMMERCE I PERSPEKTYWY ODWRÓCONEGO E-HANDLU

Streszczenie

E-biznes to model, który ewoluował z niszy skierowanej do pasjonatów, aż do ważnej części gospodarki każdego rozwiniętego państwa. Wzrost potencjału tego kanału sprzedaży i dystrybucji był silnie skorelowany z rozwojem technologicznym we współczesnym społeczeństwie. Dziś e-biznes stoi przed nowymi możliwościami rozwoju oraz nowymi źródłami zysków. Jednym z takich trendów jest idea odwróconego handlu, gdzie konsument jest zaangażowany jeszcze mocniej w silnie spersonalizowany proces zakupowy. Każda nowa idea, aby mogła zaistnieć, musi znaleźć swój czas i miejsce. Celem tego opracowania jest weryfikacja możliwości implementacji koncepcji odwróconego handlu.

Keywords: e-commerce, odwrócony e-commerce, business elektroniczny, nowe modele biznesowe, porównywarki cen

Michał Laskowski
Uniwersytet Gdański
ul. Armii Krajowej 119/121, 81-824 Sopot
e-mail: michal@laskowski.edu.p

dr Andrzej Poszewiecki
Uniwersytet Gdański
ul. Armii Krajowej 119/121, 81-824 Sopot
e-mail: poszewiecki@panda.bg.univ.gda.pl