



E-shoppers in Europe 2019 Barometer



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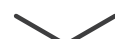
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Editorial



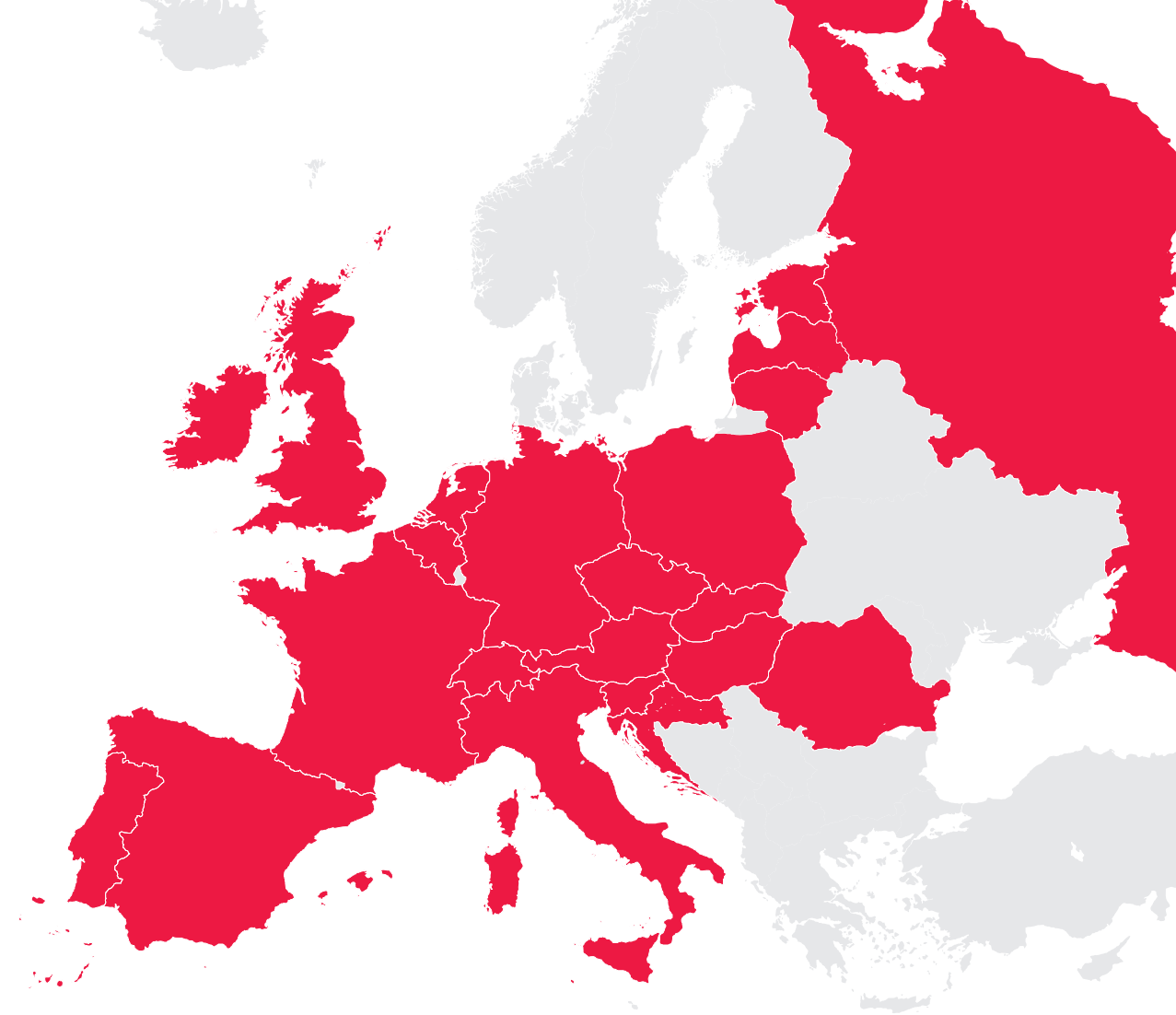
In Europe e-commerce remains strong, and convenience is key.

“For the past several years, the DPDgroup e-shopper barometer report has revealed the behaviours of Europeans who buy online, as well as the major trends that are shaping the e-commerce industry. It remains the largest and most complete survey on e-shopping and cross-border e-commerce ever conducted.

This year, our report confirms the strength and stability of the European e-commerce industry. While each country maintains its own individual specificities, Europeans on the whole have embraced e-shopping and welcome its time- and money-saving benefits. Most of all, they appreciate the convenience that shopping online provides. As this report reveals, convenience lies at the very heart of the e-commerce experience. The industry’s continued success largely depends on ensuring that this experience is consistently positive for all e-shoppers from start to finish.

The 2019 e-shopper barometer also provides exclusive, in-depth insight into three e-shopper profiles with specific attitudes, tastes and behaviours that, together, paint a compelling picture of the future market and suggest some of the diverse opportunities for growth and innovation that lie ahead.”

Jean-Claude Sonet,
Marketing Director,
DPDgroup



The 2019 DPDgroup e-shopper barometer report was conducted by GfK from 27 May to 10 July 2019. The data were gathered through blind (blind: interviewees are unaware of who requested the study), online interviews with 24,258 participants across 21 European countries (Austria, Belgium, Croatia, Czech Republic, Estonia, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Switzerland, UK) and Russia. Between 800 and 1,515 participants were interviewed per country. All participants, aged 18 or over, had ordered physical goods online since January 2019 and then received a parcel. For the consolidated results at the European level, weighted statistics were applied to each country to reflect the correct proportion of e-shoppers between the European countries.

This brochure and a comparison tool are available online at dpgdgroup.com.
The full report is available upon request.

Regular e-shoppers

"Today's e-shoppers are sending a clear message: **convenience is king**. This is especially evident when it comes to delivery. Regular e-shoppers are hungry for services that will enable them to tailor their delivery experience to suit their needs, which is why options like realtime delivery information, multiple delivery choices, advanced notifications and one-hour delivery are all very popular. Making the delivery experience as convenient as possible improves overall customer satisfaction and benefits the entire industry."

Karen Thouret,
Key Account, Digital and
e-commerce Manager
SEUR



The cornerstone and driving force of the e-commerce industry in Europe is the regular e-shopper. Representing **45%** of online purchasers, this group keeps the market strong and stable and is responsible for **85%** of online market volume in Europe. The habits, tastes and preferences that regular e-shoppers exhibit are critical to understanding the state of the e-commerce industry today, keeping in mind that while many of these behaviours apply to all or most European markets, each country naturally has its own specific patterns and characteristics.

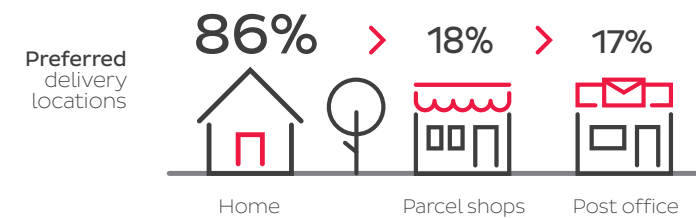
Broadly speaking, European regular e-shoppers have several years of online shopping experience. Most of them have purchased from a foreign website, especially from those located in other European countries. They are most likely to shop online for fashion, followed by shoes and books, and an impressive **78%** consider

that their most recent online shopping experience was easy.

Top categories purchased online



Cross-border purchases



Among the key characteristics of regular e-shoppers is their rich online life, which includes, but is not limited to, e-shopping. **This group is active on social media, makes regular use of mobile devices and enjoys both reading and leaving online feedback.** In fact, well over half of them choose websites based on social media and influencers. They are also receptive to loyalty schemes: nearly one third of regular e-shoppers belong to an online retailer's loyalty programme.

When it comes to delivery, regular e-shoppers are generally positive about their experience, with **78%** considering the delivery of their latest online purchase was easy. Home remains their favourite delivery

location but parcel shops are their second choice, which demonstrates their desire to have their goods delivered as conveniently as possible. These shoppers want a tailored delivery experience including services such as accurate and real-time delivery information, multiple delivery options, the flexibility to reschedule and a one-hour window of delivery. As for returns, the general opinion is positive, but there is nonetheless room for improvement: **60%** feel that their most recent returns experience was easy.

* Austria, Belgium, Croatia, Czech Republic, Estonia, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Poland, Romania, Slovakia, UK.

Top interest for **delivery preferences**



Real-time info on delivery



Several delivery options



Select day and one-hour window delivery in advance



Possibility to reschedule delivery



Next day delivery



Know the exact one-hour window of the delivery



E-shopper profiles



With its in-depth knowledge of the e-commerce industry and successive comprehensive studies of European e-shopping habits, DPDgroup has identified three major emerging segments of e-shoppers that provide valuable insight into the e-shopping behaviour of 22 different countries. Based on a series of indicators including online purchasing frequency, barriers to online purchase, website loyalty, cross-border purchasing and shopping attitudes, DPDgroup has established the following segmentations:

- The aficionado
- The epicurean
- The eco-selective e-shopper



The aficionado e-shopper

"I love to shop online. I spend a lot of time on the internet and social media, which I often use to research the products I'm interested in and to leave feedback. Having the global marketplace at my fingertips is exhilarating, and I really enjoy the convenience of being able to shop from my phone or computer and then have my purchases delivered to the location that I prefer. By shopping online, I can find bargains, save time and skip the stress of going to the store. I definitely expect to continue and do more e-shopping in the future."

Aficionado e-shoppers are:

- Very frequent e-shoppers
- Digitally savvy
- Adept at cross-border buying
- Looking for tailored delivery options



The epicurean e-shopper

"I like the benefits that e-shopping offers. I'm a busy person, but if I can find the right product at the right price online, then I'm happy to buy it. It's true that e-shopping saves time and hassle, which I appreciate. I expect the process to be simple, though. If it's too long or complicated, then I won't make the purchase. For me, shopping should be a pleasure, so I research products before I buy them, and I only choose e-tailers with good reviews. I also want to know who the delivery company is in order to be sure of the quality of service."

Epicurean e-shoppers are:

- Keen on a pleasurable e-shopping experience
- Medium frequency e-shoppers
- Selective in their purchasing choices
- Sensitive to reviews and recommendations
- Highly demanding in terms of delivery and returns



The eco-selective e-shopper

"I care about the impact of my purchases. The environment is a top priority for me, and I want to do my part to preserve it for future generations. I buy certain goods online, but there are categories that I would never buy because of their negative social or ecological footprint. When I do buy online, I prepare my purchase carefully. Social media sites are helpful and I pay attention to other shoppers' recommendations, which I trust far more than advertising. I like good deals, but I would be willing to pay more for services that are environmentally friendly."

Eco-selective e-shoppers are:

- Occasional e-shoppers
- Concerned about the environment
- Ready to pay a premium for greener services
- Looking for flexibility and multiple delivery options

The aficionado e-shopper

"For aficionado e-shoppers, **online buying is a way of life**. This group represents the thought leaders and trend setters—those whose enthusiasm moves the industry forward. Confident and connected, aficionado e-shoppers expect a smooth, hassle-free e-shopping experience, hence their high interest in services for a faster, smoother and more convenient experience. Interestingly also, aficionados' active online lifestyle and affinity for technology make them all the more likely to be early adopters of new and innovative e-shopping services."

Hervé Crochet,
Group Strategic
Account Manager
DPDgroup



Representing **13%** of the sample, aficionado e-shoppers make **34%** of all online purchases and show a marked preference for online compared to in-store buying. As its name implies, **this group knows the ins and outs of e-shopping** thanks to many years of experience but more particularly to the frequency of its purchases. Composed primarily of urban, younger women living in three or four-member households, aficionado e-shoppers are especially present in the Czech Republic, Lithuania and, to a lesser extent, Hungary, Italy and Latvia.

67%
started e-shopping
more than
5 years ago

37%
have ordered
fresh food and
beverages



Members of this group are very frequent buyers whose purchasing volume far exceeds that of the average e-shopper, reaching **8.1** parcels over the past month. Attracted by good deals, aficionados look forward to big sales events such as Black Friday, but the main reason they love to shop online is the time it saves and the stress it avoids. Aficionado e-shoppers are so passionate about online shopping that they buy all kinds of products on the internet, including far more fresh food and beverages than other e-shoppers.



Connected and tech savvy, aficionados are highly active on social media and very often consult and provide feedback about their purchases. Their familiarity with online shopping makes them more likely than most e-shoppers to seek out the products and prices they want from a wide variety of websites, including those located abroad. Members of this group are also interested

in loyalty schemes, with **39%** having signed up for a loyalty programme, meaning they are more likely to prefer websites they already know if provided with an incentive.

73%
have e-shopped
from a foreign
website



Looking ahead, there is a chance that this group will automatically grow as regular online shoppers gain experience and confidence in e-shopping. Indeed, the most probable scenario is that some regular e-shoppers will adopt the e-shopping experience as a way of living, the online purchases becoming part of their daily routine. This group's connected lifestyle and power of influence mean that it will likely remain one step ahead of other e-shoppers and will continue to set the pace for digital trends while inspiring flexible delivery services that can accommodate its high purchasing frequency and volume.

"For epicurean e-shoppers, **convenience is the bottom line**. Their purchasing habits may be less intense than those of aficionado e-shoppers, but they truly appreciate the possibilities that e-commerce provides and find online shopping to be a very attractive alternative to the in-store experience in terms of variety, availability, price, and time. The key to retaining this group is to encourage their enjoyment by making the process as smooth and convenient as possible, while avoiding any disappointment that could cause them to question the pleasure of online shopping."

Jolien Coussé,
Marketing Communication
Specialist
DPD Belgium



The epicurean e-shopper



Representing a larger sample than the "aficionado" profile, epicurean e-shoppers account for **15%** of European e-shoppers. This group is less experienced than aficionados, with many having begun to buy online less than five years ago. However, their recent discovery of e-shopping does not prevent them from embracing this way of buying. They receive an average number of parcels: **3.5 per month**. What makes them "epicurean" is their desire for ease, simplicity and personal enjoyment they expect in the e-buying experience.



Epicurean e-shoppers tend to be women, with a slightly higher income than average, urban and under **40**. They are very active and say they are willing to pay a premium for services that would make their daily life easier. They enjoy e-shopping for its convenience, with **92%** saying it saves time, **84%** feeling it saves money, and another **84%** stating the convenience of online buying outweighs the trouble of returning purchases, meaning they intend to buy even more online in the future. This group is very connected, which enables them to decide whether or not to buy: most of them look for reviews and recommendations before purchasing. They pay attention to social media, and **45%** say the



recommendations of family, friends and colleagues on social media influence their decisions. This group may also return the favour: **78%** publish or provide post-purchase feedback. This also means while positive reviews can attract epicurean e-shoppers, negative ones will push them away.

Very price-oriented, **epicurean e-shoppers search for good deals**. This brings them to buy from foreign websites more often than the average e-shopper, as long as there are no hidden fees: additional costs after check-out would be a

deterrent to their willingness to buy cross-border. In terms of delivery, epicureans look for rapid delivery, while a longer delivery time is a barrier to purchase, second only to negative social media buzz and is a leading cause for cart abandonment. Finally, this group is demanding when it comes to delivery quality, with **77%** considering it important to know the delivery company.

For **31%**
a long delivery
time is a barrier
to e-shopping



Looking ahead, epicurean e-shoppers' growth hinges on experience, whether that experience is their own or that of their relatives and co-workers they read about on social media. Regardless of their need for reassurance, e-shopping is clearly an activity members of this group appreciate and intend to do more of. In fact, epicureans consider online shopping to be so effective at saving time and money that they actually buy more categories of goods online than average e-shoppers and 76% feel they can e-shop for nearly all of the products and services they need. With 81% considering their most recent online experience as positive, the future of this group looks bright, as long as their purchasing experience remains enjoyable and if they have a delivery and return service that does not disappoint.

"Eco-selective e-shoppers are indicative of a sea of change taking place in greater society as **the environment becomes a top-of-mind concern**

for all generations. These consumers are becoming more aware of the impact that their actions have on the ecosystem and are paying closer attention to their choices. The emergence of this buyer profile heralds the mainstream arrival of eco-conscious buying habits, which is further evidence that the industry has everything to gain from becoming a greener place."

Dominique Mamcarz,
CSR Director
DPDgroup



The eco-selective e-shopper



This environmentally-aware group represents **17%** of European e-shoppers. Although **69%** have been shopping online for more than five years, eco-selective e-shoppers are occasional shoppers who claim that there are certain products that they would never buy online due to their negative environmental or social impact. Primarily urban and slightly more female than male, eco-selective e-shoppers are high income earners who tend to be older than the average European e-shopper. They are well-represented mostly



85%
confirm there are products **they'd never buy online**

in Western Europe, while in Central and Eastern Europe they are for now present in Poland, but much less in other countries.

As its name implies, **the buying habits of this eco-selective group convey a marked concern for the environmental repercussions of online shopping.** For **87%** of them, brands and companies today must have responsible and sustainable actions, while **58%** say that they are concerned about the impact of e-commerce on society, and **63%** say that they make sure to buy environmentally friendly

52%

would like to know the delivery company at the moment of purchase



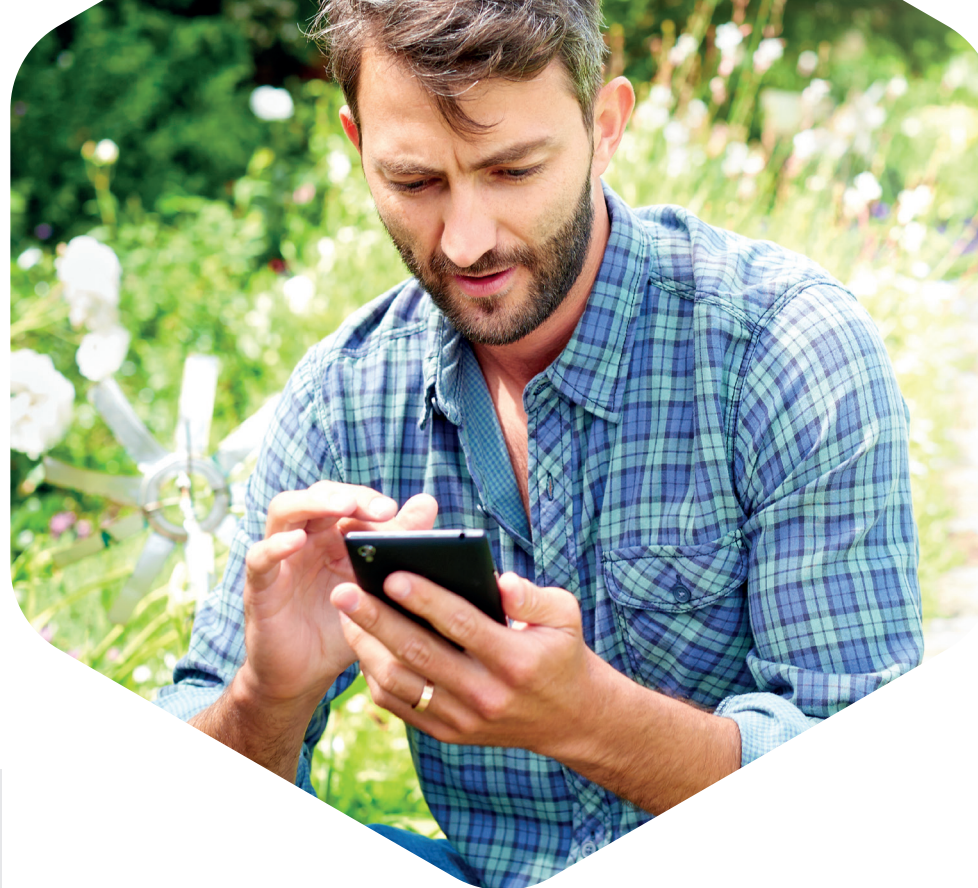
51%
actively prepare their online purchase

products whenever possible. This focus on the environment may explain the more restrained shopping behaviour of eco-selective e-shoppers, who receive 3 parcels per month, fewer than the average European e-shopper. They also buy only a narrow range of categories and rarely shop for fresh food and beverages online.

This group's cautious approach to buying leads them to prepare their purchases carefully,

often looking for reviews or requesting recommendations online before making a purchase. They frequently return to brands that they trust and rely on the opinions of their relatives and colleagues on social media or word-of-mouth. Paradoxically, this group's sensitivity to environmental and social issues makes **52%** of its members willing to pay a premium for products and services that respect the environment, yet **75%** are always on the lookout for good deals and **69%** have purchased from foreign websites, especially China, regardless of the ecological and social impact of doing so.

Looking ahead, environmental awareness is likely to increase among the general population, thus leading to a growing share of eco-selective e-shoppers in the e-commerce market. While good deals will undoubtedly remain a major motivating force for shoppers in this group, making e-commerce a sustainable and green industry is clearly a necessity in order to retain and grow this group of e-shoppers. Eco-selective e-shoppers are willing to pay more for eco-friendly options, even if there is no certainty that they will respond by increasing their purchase volume. Perhaps more importantly, the development of sustainable services and practices will benefit more greatly society and the planet as a whole.





Carmen Cureu,
Marketing
Research Director
DPDgroup

“In Europe and despite the specificities of each country surveyed, we find common ground in e-shoppers’ attitudes and behaviour. For instance, e-shoppers see e-commerce as a way to simplify daily life and save money. They are also active on the web notably on social media. Finally e-shoppers are more aware of the environmental impact of e-commerce and expect responsible actions on the part of brands and companies.”

A rich and dynamic online life

E-shopping is but one facet of the diverse online activities that today’s regular e-shoppers enjoy. Tech-savvy and connected, e-shoppers, as a whole, are frequent users of mobile devices, are active on social media sites such as Facebook, YouTube and Instagram and are often attracted to online loyalty programmes. Aficionado e-shoppers in particular are adept at using multiple social media sites to follow their favourite brands and manage their personal online visibility.

Social media platforms are among the primary means by which regular e-shoppers obtain information prior to purchase, with the majority choosing websites based on reviews and

recommendations. Eager to help other shoppers make informed decisions, they frequently provide and share post-purchase feedback online. Epicurean e-shoppers are especially attentive to influencers and online opinions when preparing to make purchases.

E-shoppers’ interest in reading user comments ahead of buying makes them particularly sensitive to negative reviews. Bad buzz can thus spell disaster for e-tailers, especially if the criticism multiplies, or worse, goes viral. This is particularly true of eco-selective e-shoppers who cite bad opinion of fellow shoppers on social media as their n° 1 reason not to buy online.



Preference for the parcel shop

As e-shopping grows in popularity among European shoppers, there has been a gradual shift in delivery preferences in favour of parcel shops. Thus, while home remains in the lead, **parcel shops rank on average as European e-shoppers’ second preferred delivery location** and, with respect to local specificities, has eclipsed the post office for the first time in four years.

This change is indicative of a broader demand for convenience in the e-shopping experience. Among the primary motivating factors to engage in online shopping is a marked appreciation for the ease and flexibility that it offers, and this desire for convenience from start to finish clearly includes the notion of proximity. Thus, while e-shoppers prefer to have their parcels delivered to their front door, they also welcome the possibility of retrieving their online orders from a convenient location.

As last mile services continue to develop, facility and proximity are critical to success. E-shoppers expect multiple delivery choices and remain extremely receptive to helpful delivery services such as real-time information, next-day delivery, rescheduling options, advanced notifications and a one-hour window selection.

The opportunity of a greener e-commerce

With the issue of climate change gaining importance in the public mind, consumers around the world are becoming increasingly environmentally-aware and are making purchasing decisions accordingly. This trend includes the e-commerce sector, where eco-selective e-shoppers demonstrate their concern for the environmental impact of their consumption both through the products they choose and the expectation they have for companies to do their part to be responsible.

Ecological awareness and digital engagement often go hand in hand, meaning that e-shoppers are using their mobile devices to research the environmental credentials of the products they desire before purchasing. Despite a certain ambiguity when it comes to bargains versus sustainability, both epicurean and eco-selective e-shoppers are particularly sensitive to environmental topics and tend to read up on their desired goods before buying them.

Moreover, this desire for sustainability encompasses services as well as products: **eco-selective e-shoppers are ready to pay more for eco-friendly services**, while epicurean e-shoppers are willing to pay a premium price for services that will make their lives easier. As the sustainability market grows, driven in particular by millennials, there is a clear opportunity for the entire e-commerce industry to reassure these e-shoppers by embracing an ecological mindset and proposing greener services.



Key take-aways



E-shoppers expect e-commerce to be environmentally responsible

As climate change gains greater importance, a minority of buyers actively choose online purchases with a low environmental impact, while a greater number of e-shoppers expect responsible actions on the part of brands and companies.



Parcel shops now rank on average as the second preferred delivery location in Europe after home

As e-buyers look for greater ease and convenience in the e-shopping process, they are choosing parcel shops more often for delivery based on their location.



E-shoppers want rapid delivery with multiple options

A smooth online experience coupled with the ability to tailor fast delivery can influence the choice to purchase; longer delivery periods may be a barrier and cause for cart abandonment.



E-shoppers actively look cross-border for good deals online, as long as no extra fees apply

Bargains and good deals take priority over all other criteria. This is indicative for the eco-selective e-shoppers who purchase outside of Europe despite the ecological consequences of doing so.



E-shoppers are developing a rich online life beyond the click-to-purchase moment

Active on the web, today's e-buyers use social media to research products prior to buying and share post-purchase experience for others. These connected habits will influence tomorrow's e-commerce landscape.



About DPDgroup

DPDgroup is Europe's second largest parcel delivery network. DPDgroup combines innovative technology and local knowledge to provide a flexible and user-friendly service for both shippers and shoppers. With its industry-leading Predict service, DPDgroup is setting a new standard for convenience by keeping customers closely in touch with their delivery.

With more than 75,000 delivery experts and a network of more than 42,000 Pickup points, DPDgroup delivers 5.2 million parcels each day through the brands DPD, Chronopost, SEUR and BRT.

DPDgroup is the parcel delivery network of GeoPost, which posted sales of €7.3 billion in 2018. GeoPost is a holding company owned by Le Groupe La Poste.



For more information,
please consult our site

dpdgroup.com/e-shoppers

