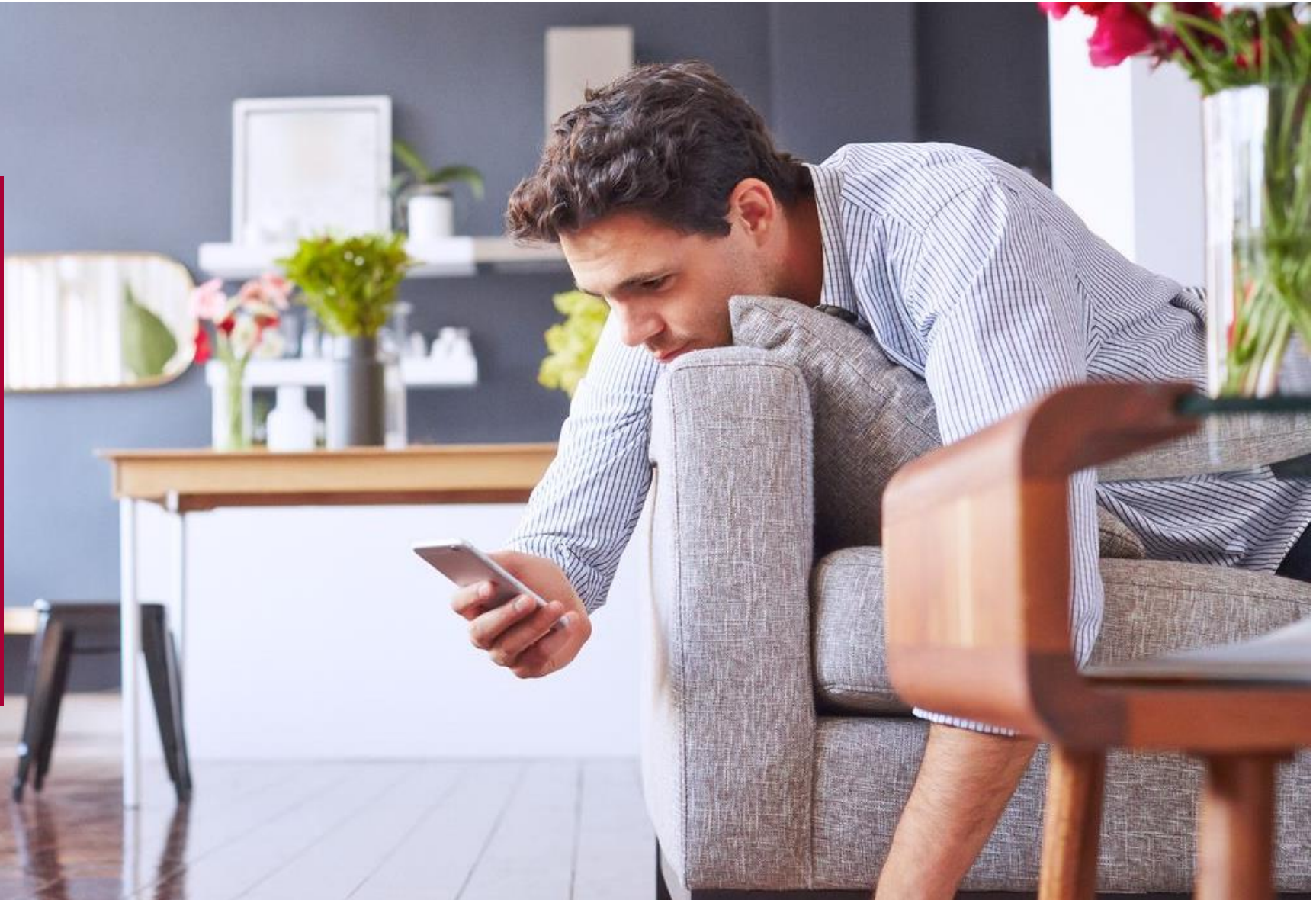


European e-shoppers in 2019

European results
DPDgroup Barometer



DPDgroup e-shopper barometer - Methodology



Agency

GfK



Study scope

25,000 online interviews in 21 European countries, Russia & Brazil



Sample size per country

800 to 1,500



Sample type

E-shoppers of 18 years and above, who have received a parcel following an online purchase.

A representative sample per country was used based on gender, age, region and income.



Fieldwork

June 2019

Regular e-shoppers –
the backbone of e-commerce





Regular e-shoppers make 85% of all online purchases



85%
of all online
purchases
are made by
45% of
e-shoppers,
the regular
ones



13.5%

of their purchases are
made **online**

They mainly
buy online

58%
fashion

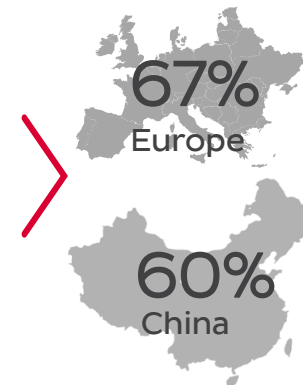



49%
shoes

46%
books



They
have already
bought online from
foreign websites



78% 
consider that making
their last online
purchase was easy



Regular e-shoppers' attitudes at a glance



80%

"I consider that shopping online saves time"



"For me, shopping online saves money"



67%

"I think shopping online strongly reduces the stress of buying in stores"

70%

"I consider that brands and companies have to be environmentally responsible these days"



BUT only...

50%

"I make sure to buy environmentally friendly products when possible"



43%

"I am willing to pay a premium for products/services respectful of the environment"





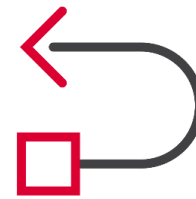
Regular e-shoppers' purchase habits at a glance



64%
use a **smartphone**
to shop online



31%
are subscribed to an online
retailer's **loyalty scheme**



9% **returned** their last
order and

60% considered it was
an easy process

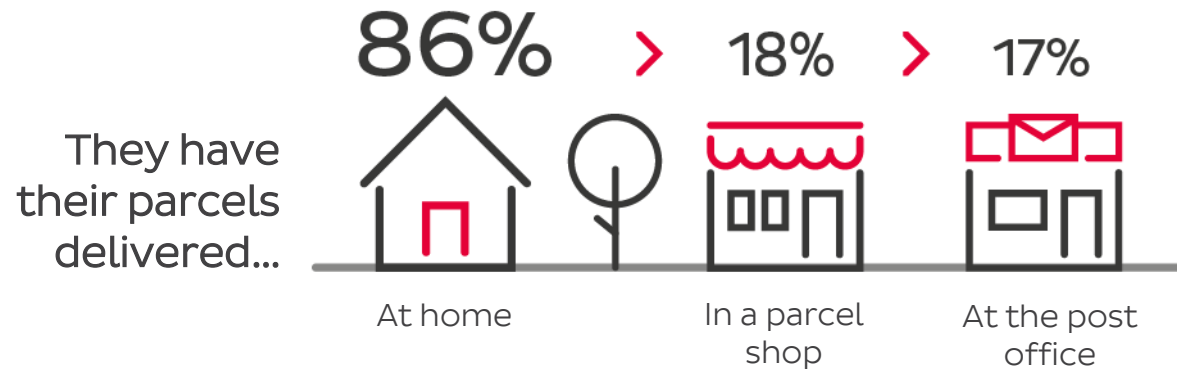


70%
shared or published
feedback after
purchasing and

60%
choose the website
based on **social
media and
influencers**

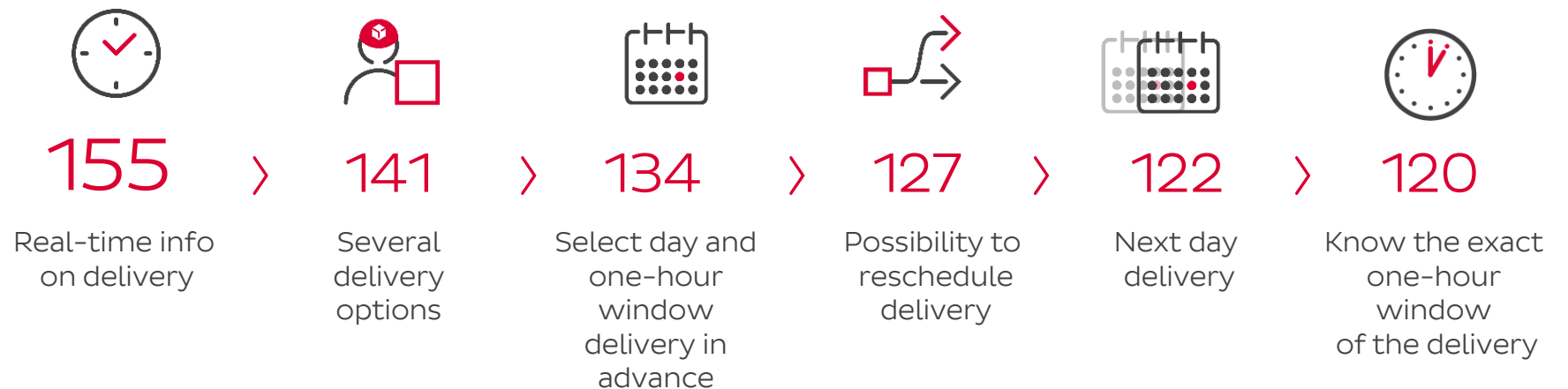


Regular e-shoppers' delivery preferences at a glance



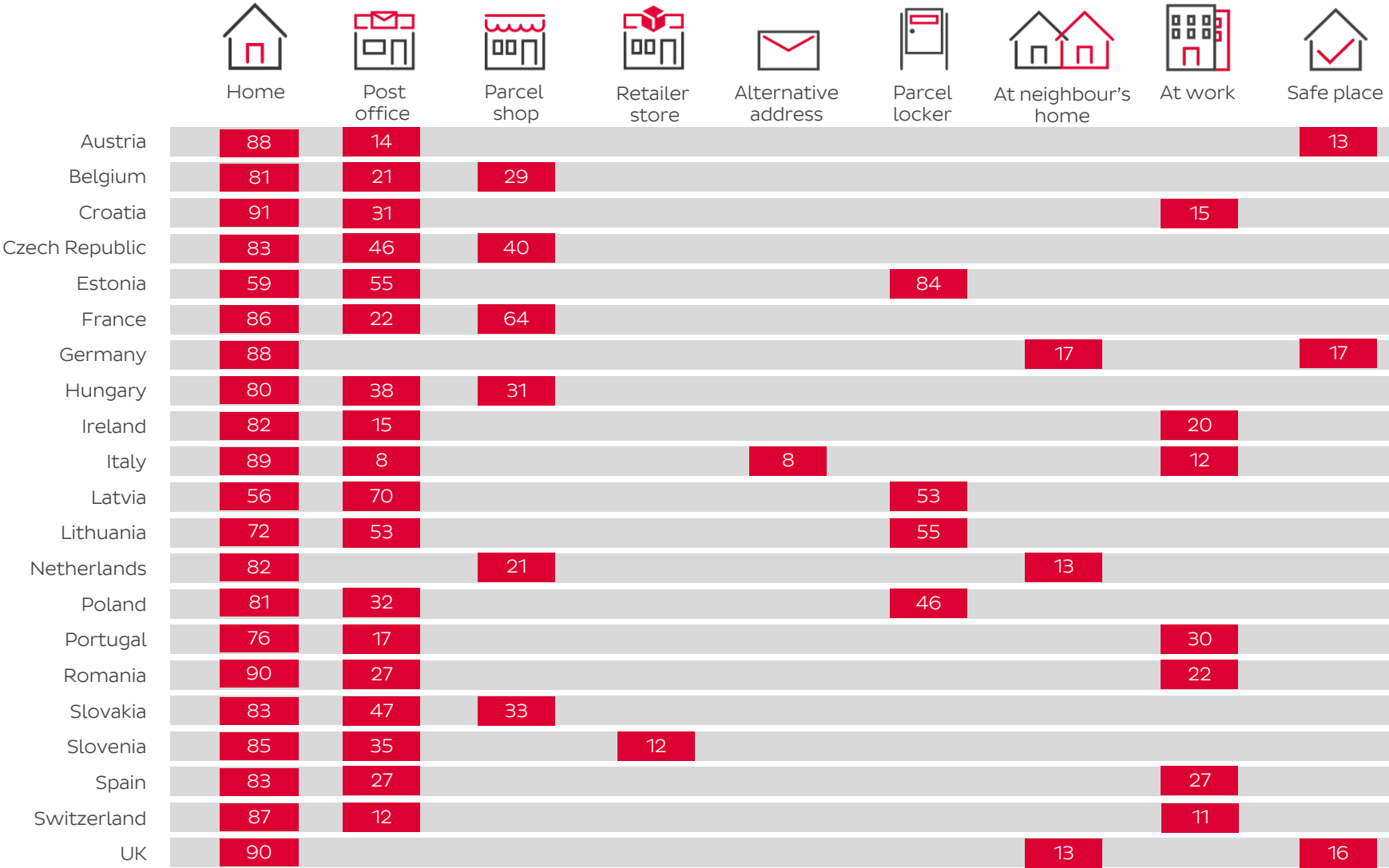
consider that the **delivery** of their latest online purchase **was easy**

They are enthusiastic about...





Regular e-shoppers delivery preferences at a glance



After home, the universally favoured delivery location in Europe, e-shoppers in each country have their own specific preferences. (expressed in %)

Various e-shoppers profiles, different expectations

2

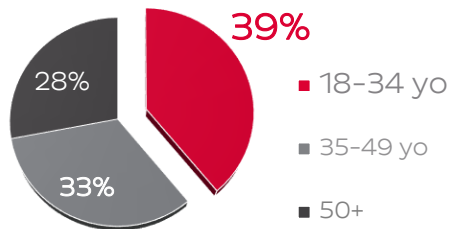
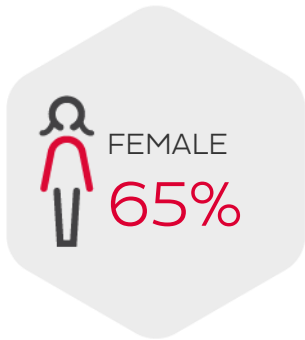
A variety of e-shoppers' profiles



The e-shopping aficionados

3071 respondents

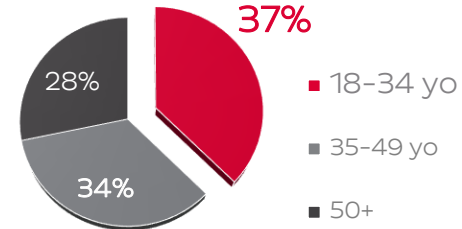
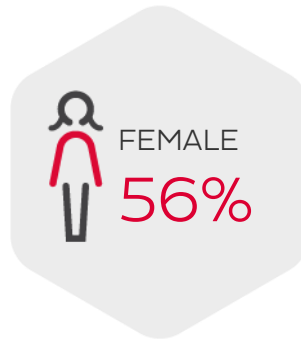
They represent:



The epicurean e-buyers

3386 respondents

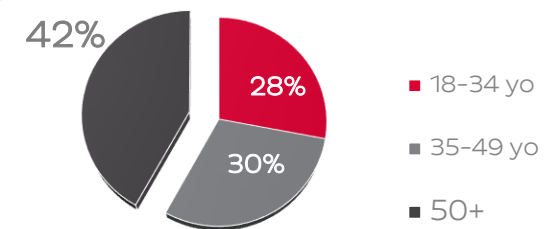
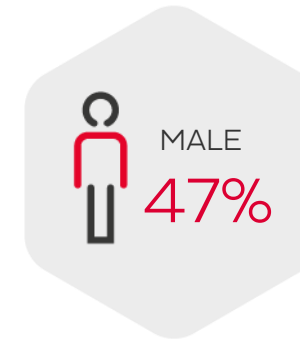
They represent:



The eco-selective e-shoppers

3964 respondents

They represent:



A variety of e-shoppers' profiles



The e-shopping aficionados

In the last month, they received

8.1 parcels

73%

"Shopping online is very convenient"



58%

"Traditional stores are less important for me"



62%

"I can shop for nearly 100% of what I need online"



The epicurean e-buyers

In the last month, they received

3.5 parcels

57%

"I'm ready to pay a premium for services that make my life easier"



80%

"It is important to indulge myself"



85%

"Companies have to be environmentally responsible"



The eco-selective e-shoppers

In the last month, they received

3 parcels

52%

"I'm willing to pay a premium for products respectful of the environment"



58%

"I am concerned about the impact of e-commerce on society"



75%

"I'm always on the lookout for a good deal"



A variety of e-shoppers' profiles



The e-shopping aficionados, the foundation of e-commerce



The epicurean e-buyers, fuel for future growth



The eco-selective e-shoppers, a growing eco-consciousness



The Aficionados purchase all types of goods online, including groceries and fresh food



8.5
categories
bought on average



have started
purchasing online
more than 5 years ago

Monthly, they buy...

#1



43%
Fashion

#2

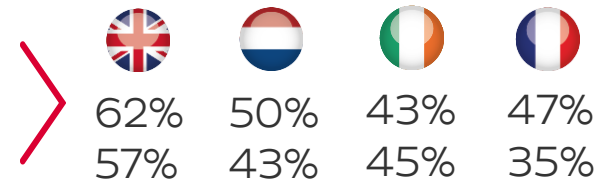


36%
Beauty/
health care

#3



31%
Groceries
Fresh food





They purchase a lot on foreign websites,
mainly outside of Europe



73% have already bought
online from foreign websites

And mostly in...

Estonia		99%
Lithuania		96%
Slovenia		95%
Ireland		95%
Latvia		94%
Hungary		92%
Switzerland		92%
Portugal		91%
Croatia		91%

Most common foreign
countries from which they buy

#1		68% China
#2		44% USA
#3		36% Germany
#4		32% UK



High satisfaction with the purchase experience drives strong loyalty



Last online purchase experience was positive

84



...are loyal to certain websites, but like to change sometimes



...are subscribed to a retailer loyalty program

Highest % of loyalty programs

Austria		54
Spain		52
Italy		49
Germany		45
UK		45
France		44



They have a rich online life, which influences their e-shopping choices

72%

“I follow or like brands on social networking sites”



44%

“It is very important to actively manage my **online identity**”



They use mostly...



Facebook

82



YouTube

72



Instagram

53

3,0

on average

Their choice of a website is driven by...

Trust in the website's brand

70%

Social Media (recommendation, advertising) and influencers

65%

Highest impact of social media

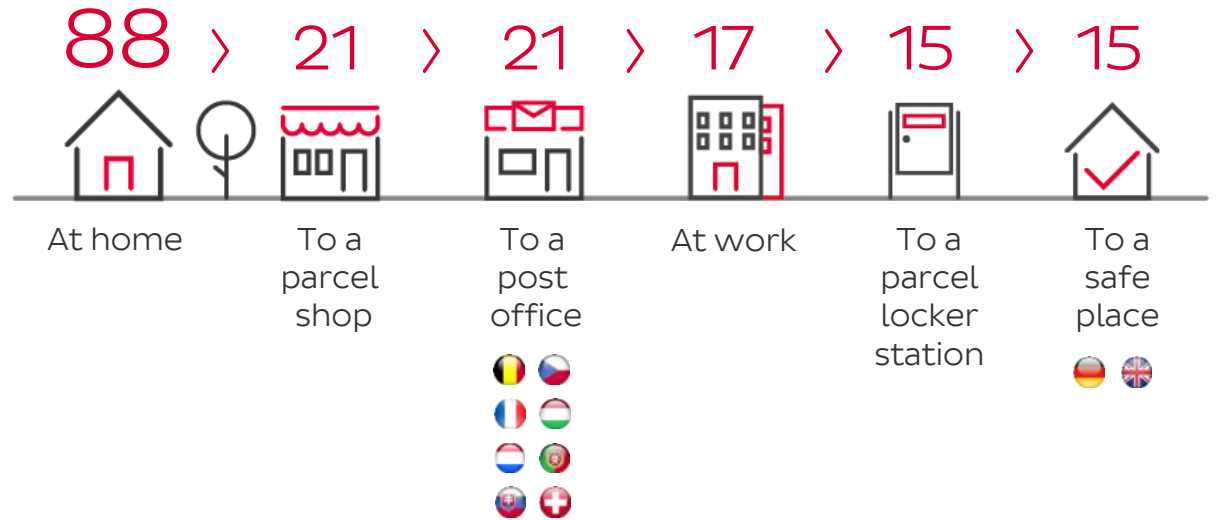
Romania		82
Latvia		79
Slovakia		77
Poland		75
Portugal		75
Ireland		75
Hungary		75



The delivery process is effortless for them.
They mix home deliveries with alternative out of home places



They have their parcel delivered...





They expect visibility, flexibility and precision

They are enthusiastic about...



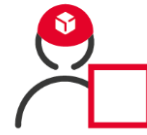
152

Real time information on the parcel



143

Day and exact 1-hour window Selected in advance



142

Having several delivery options in places



130

Rescheduling the delivery



127

Knowing the exact 1-hour window/ timeslot of your delivery



121

Next day delivery

Among top3 expectations in





The epicureans purchase several categories online, but with an average overall frequency

They purchase online...



55%
Fashion



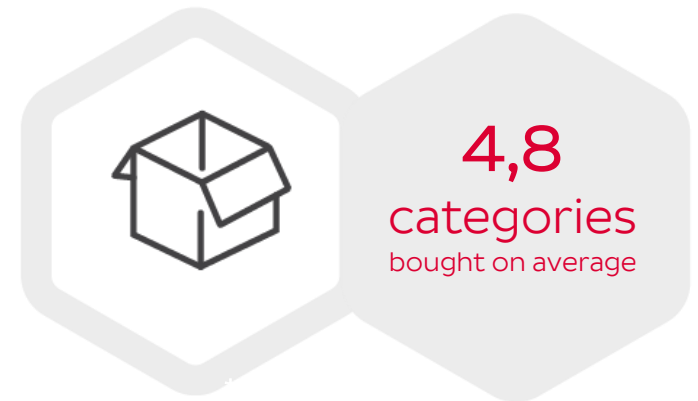
51%
Shoes



41%
Beauty/
health care

84%

“Shopping online is so convenient that I use it more and more”





They are less experienced in terms of e-shopping and this impacts their way of purchasing



have started purchasing online less than 5 years ago



Countries with highest no. of recent epicureans

Hungary		70%
Belgium		64%
Croatia		61%
Slovenia		60%
Switzerland		57%
Romania		56%
Italy		55%

They prefer...

to buy **well-known brands** as they are more **trustworthy** **80%**

to shop on websites that also have **physical stores** **69%**

Their last purchase was...

carefully prepared... **49%**

...through

a search directly on the website I purchased it on		56
an initial search on a search engine (Google, Bing...)		22
a comparison portal for products		9
a search on social media		8



Social media are amongst the top drivers of choice of a website for epicureans

86%

“I actively look for reviews and ask for recommendations online before making a purchase”



Their choice of a website is driven by...

Social Media and influencers

67%

Trust in the website's brand

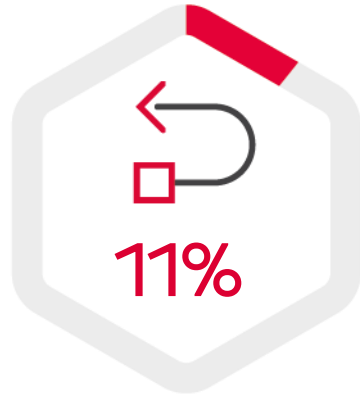
61%

Highest influence of social media & influencers

Romania		77
Spain		77
Austria		77
Portugal		75



Epicureans returned more than average their last purchase.
About half of them considered the return was not very easy



... returned their last purchase



... did not find it easy/effortless

Epicureans who returned a parcel in the past 12 month looked at the return policies...

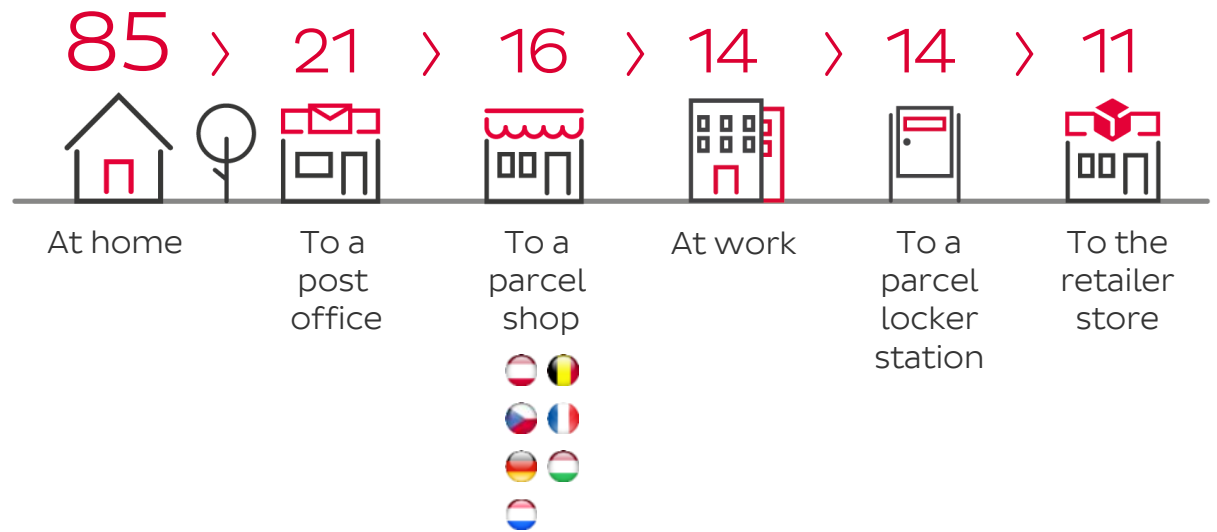
57% Before buying



As aficionados, they use more alternative locations to home delivery. They are satisfied with the delivery, though slightly less than the average

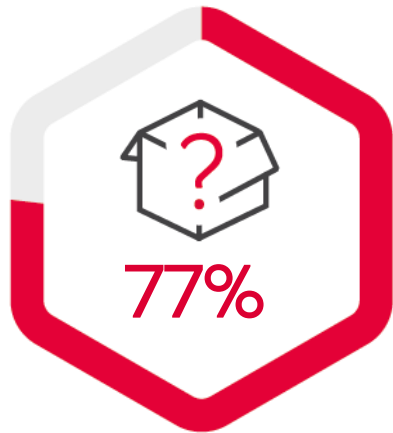


They have their parcel delivered...





Delivery is the new convenience



... consider important to know the delivery company...



And mostly in...

Romania		87%
Germany		86%
Poland		85%
Switzerland		85%
Slovenia		84%
Netherlands		81%
Czech Republic		80%

... because

It is reassuring to know who will deliver my parcel

44

If possible I would like to choose one which guarantees a good delivery service

38

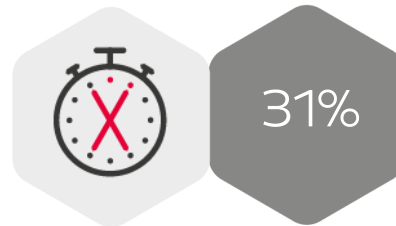
I have preferences when it comes to delivery companies

25

I have had bad experience(s) with a specific carrier and try to avoid using it if possible

24

Barriers to purchase

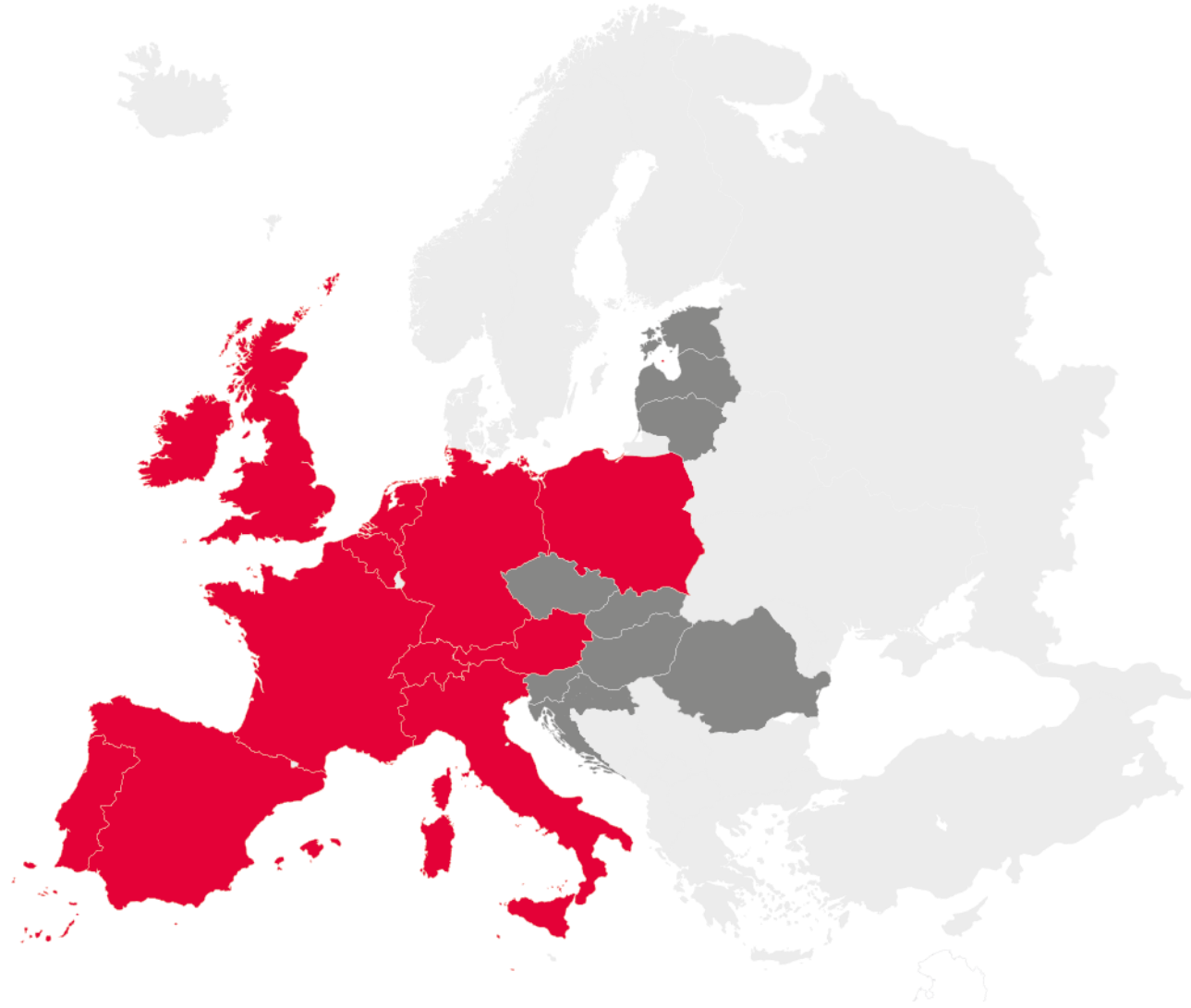


Delivery time too long

1st barrier in:



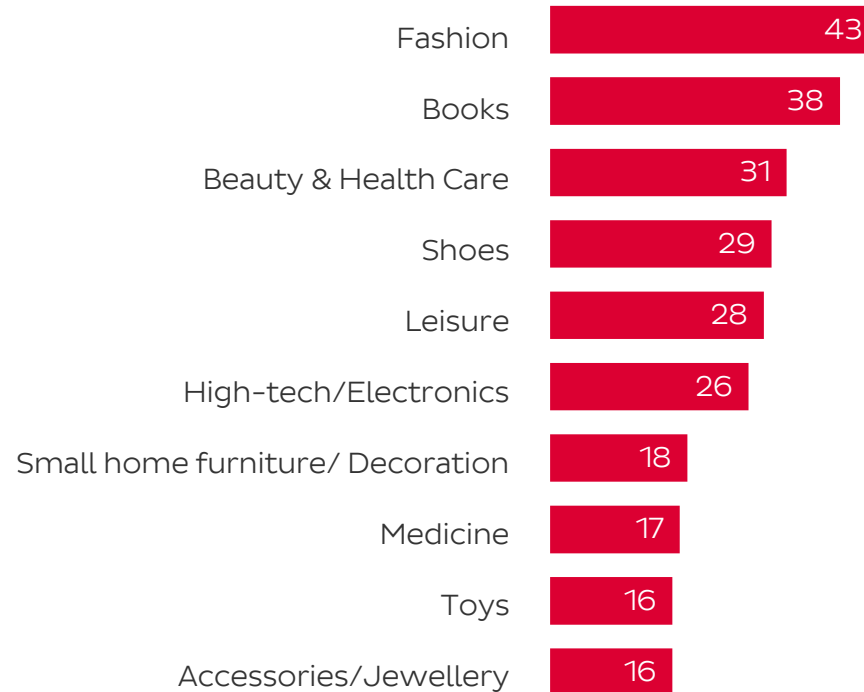
Eco-selective e-shoppers are only represented in Western European countries, and in Poland.





They have a narrower range of categories in their e-shopping basket and a low purchase frequency

They purchase...



85%

“There are products that I would never buy online”



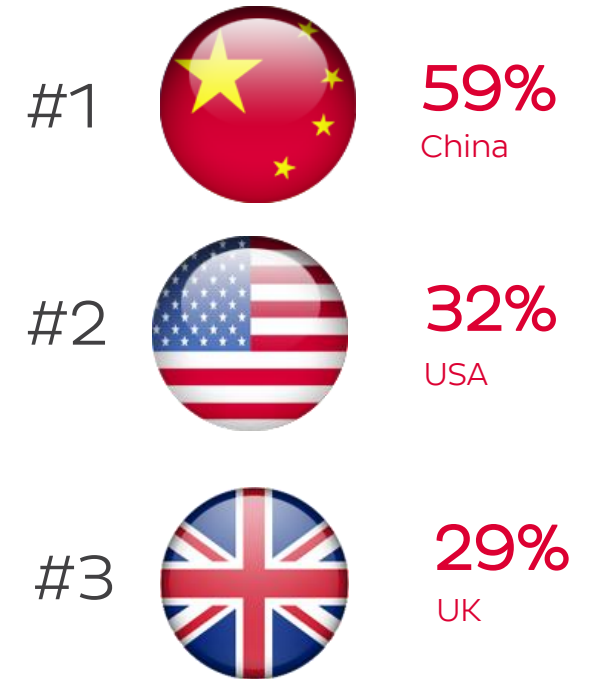


Their sensitivity to good deals pushes them to search for better deals, even abroad



have already bought online from foreign websites

Most common foreign countries from which they buy
(n=3249)





They are mainly discouraged by bad online buzz, while delivery-related topics matter less

They can stop purchasing from a specific website in case of...



50

Bad opinion of fellow shoppers on social media



39

Not enough security checks for payment

1st barrier in:



26

Having to pay in case of return



25

Proposed item no longer in stock



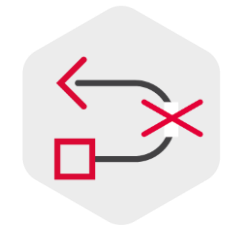
24

Delivery time too long



23

Having to pay delivery fees



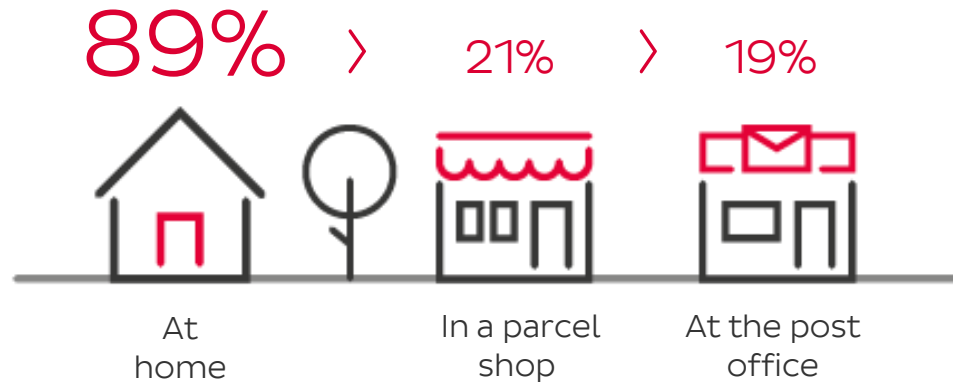
23

Complicated return process



They are happy with the delivery experience and favour more than average home, but also parcel shop and post office deliveries

They have their parcel delivered...



In terms of delivery, they expect to...



149

...have several delivery options in places



140

...be informed of each step of the delivery process/ be informed in real time

