EUROPEAN REPORT

E-SHOPPER BAROMETER 2023

EXECUTIVE SUMMARY (1/2)

1. E-commerce – still declining in 2023

- After the increase observed in 2021, the share of European e-shoppers decreases over the past 2 years (-1 pt in 2022 and – 1 pt in 2023).
- In parallel, the share of regular e-shoppers remains stable: they still represent almost 1 out of 2 e-shoppers, but their online purchases have decreased compared to 2021, reaching 5.2 parcels in the last month.
- They purchase the same number of categories online, except fresh food and beverages, bought online by less of them in 2023.
- European regular e-shoppers remain deeply convinced by e-commerce, it is perceived as a way to reduce the stress of shopping and to save time.

2. Regular e-shoppers remain very price sensitive

- Online shopping is seen as a way to save money – by 65% of regular e-buyers, even more than before. And regulars are less open than before to pay a premium for green products.
- 62% of regulars claim that price is the most important factor when buying and almost 60% are looking for real good deals.

3. Usage of C2C platforms and e-shopping through social media keep on growing in Europe

- 7 in 10 regular e-shoppers are buying and/or selling on C2C platforms, and a third claim they have increased their second-hand product purchases. Their motivations to buy from individuals remain the same, ie it allows to buy more affordable products.
- In 2023, more regular e-shoppers sell on these platforms, mainly to free up space, because they have products they don't use, and thirdly to earn extra money.
- In terms of delivery, they either choose the carrier proposed by the website or the one from the seller, and 1 in 3 favor in hand delivery.

- Social media are widely used for shopping purposes (by 7 out of 10 regular e-shoppers), first to find inspiration or to get information, and also to buy directly for 48% of regular e-shoppers.

EXECUTIVE SUMMARY (2/2)

4. The perception of online purchase and delivery experiences are stabilizing in 2023

- The downward trend observed in 2021 and 2022 has stopped this year. Yet the perception has not grown up:
- The online purchase is perceived as not easy because regulars were not sure about the product to buy, the product they wanted was out of stock or the choice on the website was not wide enough.
- Regarding the delivery, their perception of high effort is mainly linked to delay in the delivery or a delivery that happened at another moment than the one expected.
- In this context, knowing the delivery company remains very important, regulars willing to choose one they know, and they trust.

- 14% of regular e-buyers returned the last item they purchased online. Their satisfaction remains quite low, because of the frustration felt when they realized that the product bought was not the one expected, and because of the return process itself (having to repack the parcel and to print the return coupon).

- While free delivery and free return still represent the main online purchase drivers, and having to pay for delivery and return, along with bad opinion on social media and too delivery time are the main blocker, regular e-shoppers grant more importance to the detailed description of the product and transparent and complete return costs. This may be explained by the fact that returns are not free in some cases, on some e-tailers, and perceived as complicated.

- In terms of delivery places, home delivery remains #1, but used by less e-shoppers than in the past, to the benefit of parcel shops and parcel lockers, both more used in 2023 than in the past.

5. The online heavy buyers, “The Aficionados”, also buy a bit less on the internet

- This specific group of e-shoppers still buy many products categories online – 8,6 categories – and receive a high number of parcels each month (7,2 parcels, but slightly less in 2023.
- They are even more bargain hunters than the regulars and consider that online shopping allows to save money.
- However, Aficionados are less satisfied with their online purchase and delivery experiences than regulars, as with their return experience (strong gap vs. 2021) :
  - 67% of Aficionados claim their last delivery was easy
  - 64% claim their last online purchase was easy
  - 49% claim their parcel return was effortless
- The same reasons of unsatisfaction among Aficionados than among regular e-buyers overall.

METHODOLOGY

Sample

18+ y.o. European e-shoppers who have ordered physical goods online since January and then, received at least one parcel, identified within a sample representative of the national population in age, gender, and SEC.

For the consolidated results at European level, a weight was applied to each country in order to reflect the right proportion of e-shoppers between the European countries.

Key targets

- **Regular e-shoppers:**

E-shoppers aged 18 to 70 years old, who buy at least one product category every month online.

- **Aficionados:**

15% of the total e-shoppers with the highest number of annual online purchases.

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METHODOLOGY

Data collection

- Online data collection (blind: interviewees do not know who requested the study)
- 24,233 interviews across 22 European countries (unweighted)
- Number of interviews per country (unweighted):

Austria:	1,005	Germany:	1,506	Portugal:	1,006
Belgium:	1,003	Hungary:	1,014	Romania:	1,015
Bulgaria:	1,014	Ireland:	1,003	Slovakia:	1,009
Croatia:	808	Italy:	1,504	Slovenia:	809
Czech Republic:	1,035	Latvia:	806	Spain:	1,502
Estonia:	801	Lithuania:	804	Switzerland:	1,009
France:	1,501	Netherlands:	1,007	UK:	1,502
		Poland:	1,570		

Fieldwork

Fieldwork conducted from May 31st to July 19th, 2023

LEGEND FOR EVOLUTIONS

Significant differences

between 2023 and 2022 / 2021 scores are shown as follows (at 95% confidence rate)

when **positive**:	+XX ▲	vs 2022	+XX △	vs 2021
when **negative**:	-XX ▼	vs 2022	-XX ▽	vs 2021

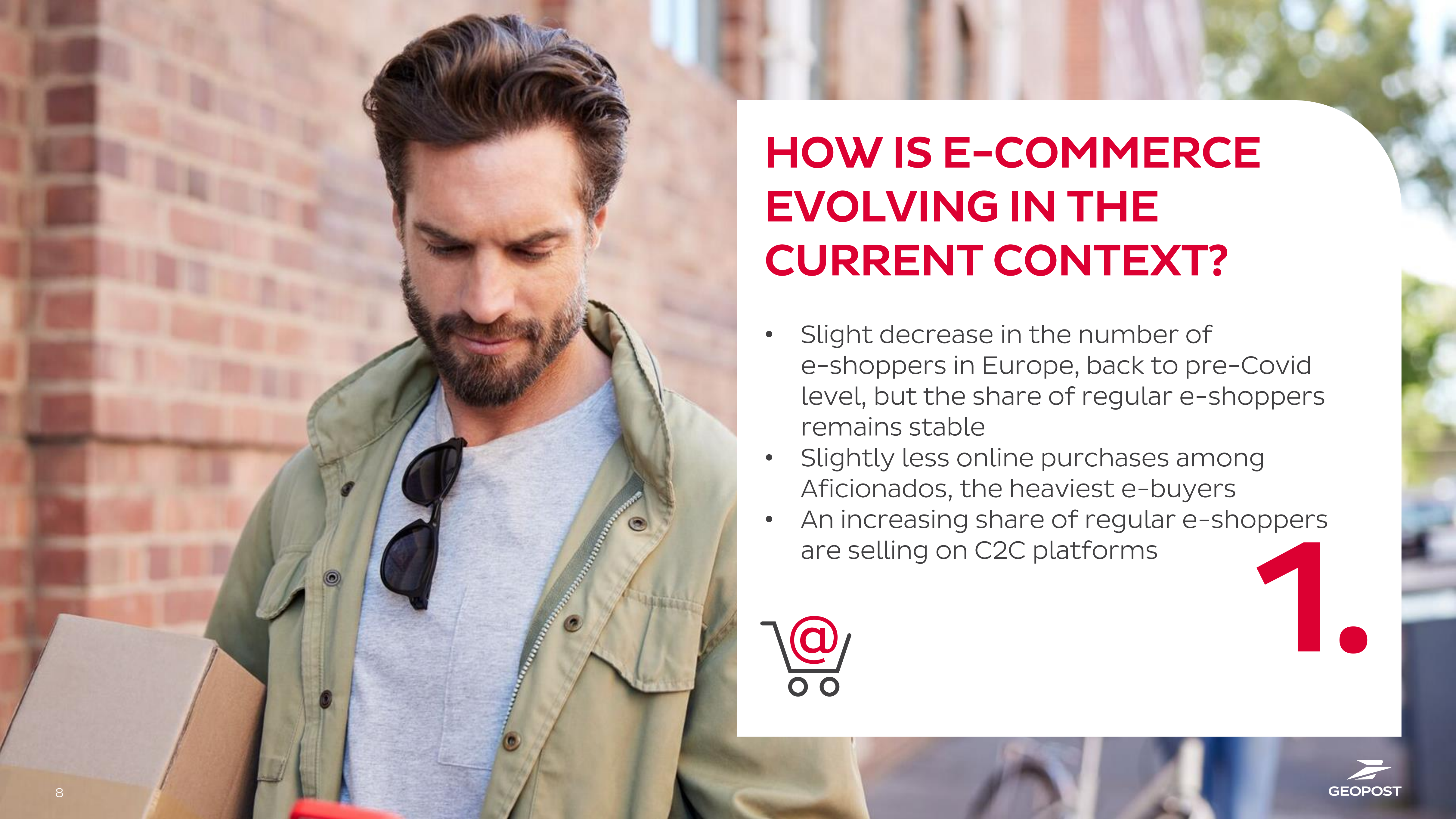
with +/- xx the number of points difference vs. 2023.

No arrows if no significant difference.

HOW IS E-COMMERCE EVOLVING IN THE CURRENT CONTEXT?

THROUGH REGULAR E-SHOPPERS

1. How is e-commerce evolving in the current context?
2. To what extent has inflation impacted e-shopping?
3. What are the main trends of delivery?
4. Appendix



HOW IS E-COMMERCE EVOLVING IN THE CURRENT CONTEXT?

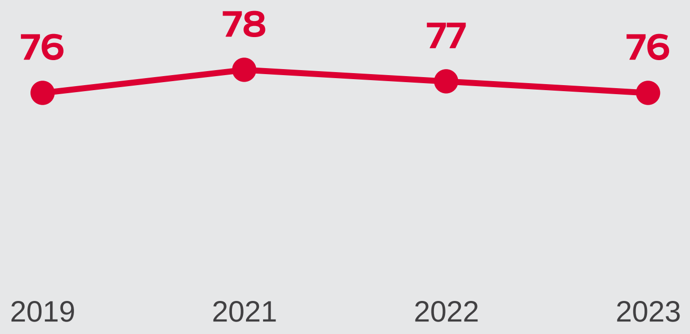
- Slight decrease in the number of e-shoppers in Europe, back to pre-Covid level, but the share of regular e-shoppers remains stable
- Slightly less online purchases among Aficionados, the heaviest e-buyers
- An increasing share of regular e-shoppers are selling on C2C platforms

1.

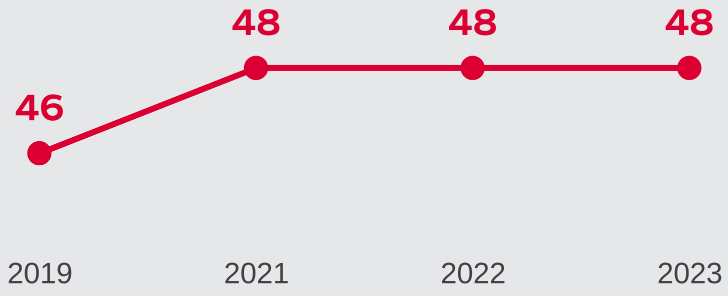
TOTAL E-SHOPPERS AND REGULAR E-SHOPPERS

E-COMMERCE KEY TRENDS IN SCORECARD

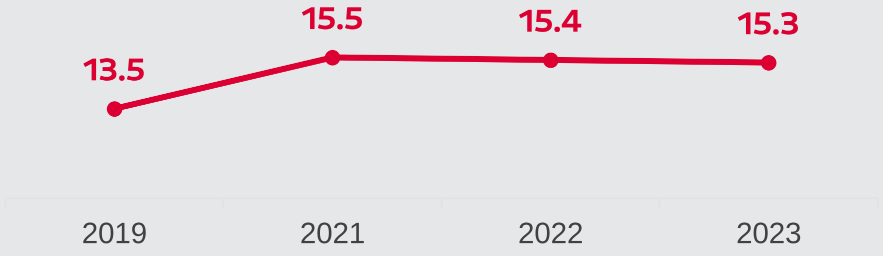
After the increase observed post Covid, the share of e-shoppers decreases in Europe to reach back the level of 2019. The number of regular e-shoppers remains stable over the years, but a bit less parcels received in the last month vs in 2022.



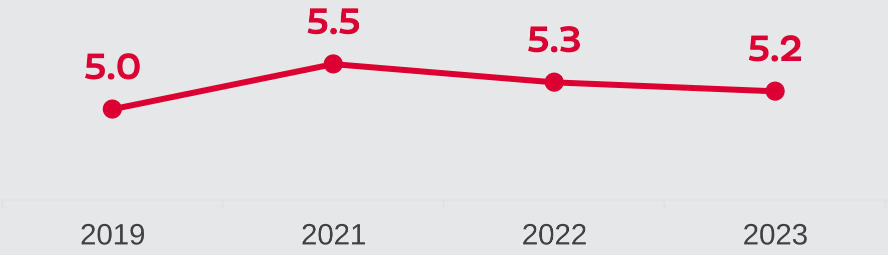
%- Share of e-shoppers among total population



% - Share of regular e-shoppers among total e-shoppers



% - Average share of online shopping for regular e-shoppers



Number of parcels received last month for regular e-shoppers

Significant differences are not shown in this slide

TOTAL E-SHOPPERS

E-COMMERCE DYNAMIC

Definition

This map illustrates the level of **e-commerce dynamic** within the European countries, giving a benchmark to each market to identify its own position in comparison to the EU average.

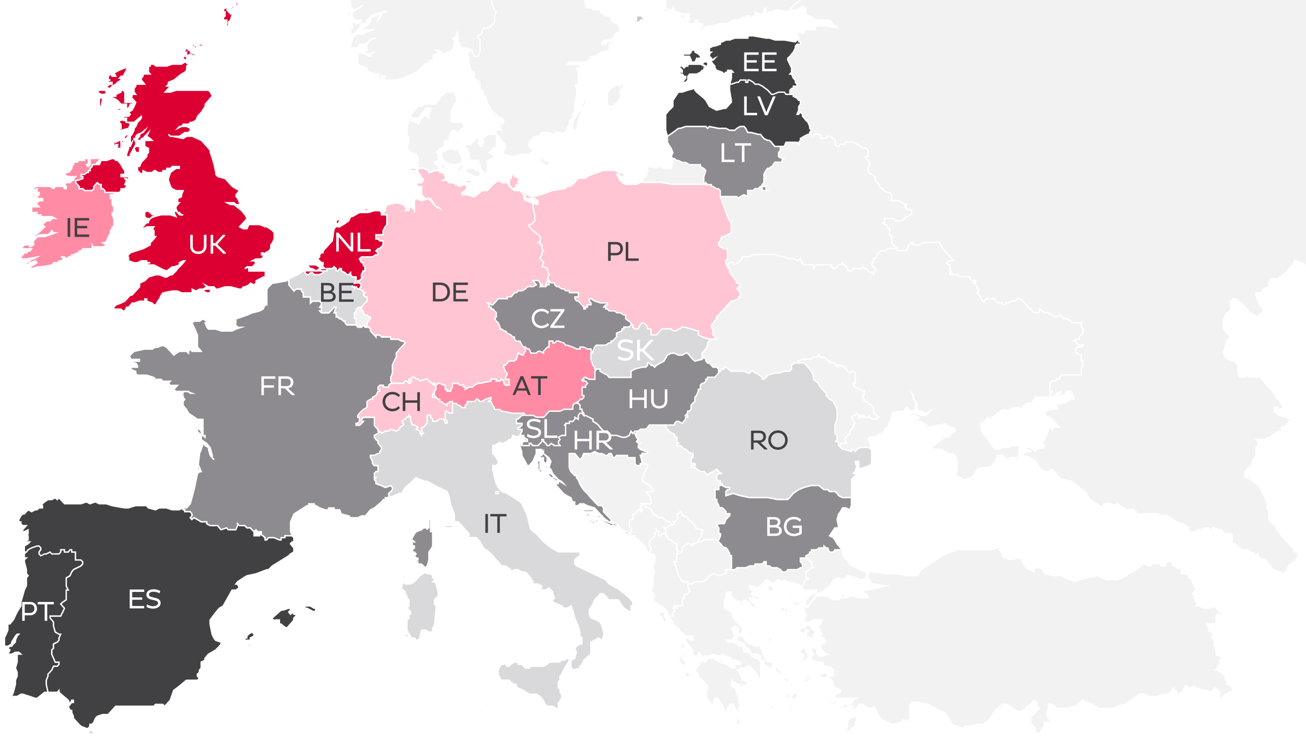
The dynamic of e-commerce is defined by:

- Share of e-shoppers (country weighted)
- Share of regulars among e-shoppers (country weighted)
- Number of parcels received last month (regular e-shoppers)

Legend

E-commerce more active vs. EU average

E-commerce less active vs. EU average



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TOTAL E-SHOPPERS

E-COMMERCE KEY TRENDS – COUNTRY ZOOM

	Share of e-shoppers among total population		Share of regular e-shoppers among total e-shoppers	
Austria	🟥 77%		🟥 51%	
Belgium	▨ 73%		☐ 48%	
Bulgaria	🟥 80%		🟥 51%	
Croatia	☐ 76%		▨ 44%	
Czech Republic	▨ 69%		🟥 49%	
Estonia	▨ 69%		▨ 42%	-10▼
France	▨ 67%		▨ 44%	
Germany	🟥 80%		▨ 46%	
Hungary	▨ 72%	-3▼	🟥 49%	-5▼
Ireland	🟥 81%	+4▲	🟥 55%	
Italy	🟥 82%		▨ 45%	
Latvia	▨ 64%		▨ 45%	
Lithuania	▨ 63%		🟥 50%	
Netherlands	🟥 81%		🟥 49%	-5▼
Poland	▨ 72%	-5▼	🟥 55%	
Portugal	▨ 71%	+5▲	▨ 42%	
Romania	▨ 75%	-4▼	🟥 54%	
Slovakia	🟥 80%	+6▲	☐ 48%	
Slovenia	▨ 72%	+5▲	🟥 49%	+6▲
Spain	▨ 69%		▨ 40%	
Switzerland	🟥 78%		🟥 53%	
UK	🟥 81%		🟥 53%	

🟥 above European average
☐ equal to European average
▨ below European average

Significant differences vs. 2022 only

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KEY FACTS ABOUT REGULAR E-SHOPPERS COUNTRY ZOOM

	% of all online purchases made by regular e-shoppers		% average share of online shopping (in total shopping – average of all categories)	number of parcel received last month by regular e-shoppers	
Austria	🟥 89%		⬛ 15.2%	🟥 5.9	
Belgium	🟥 88%		⬛ 14.1%	⬛ 5.1	+0.9▲
Bulgaria	🟥 90%		⬛ 14.1%	⬛ 3.6	
Croatia	🟥 88%		⬛ 14.2%	⬛ 4.1	
Czech Republic	🟥 88%		⬛ 14.1%	⬛ 4.1	
Estonia	⬛ 85%		⬛ 14.5%	⬛ 4.3	+0.6▲
France	☐ 86%		⬛ 13.9%	⬛ 4.7	
Germany	⬛ 85%		🟥 18.4%	🟥 5.8	-0.9▼
Hungary	🟥 87%	-4▼	⬛ 12.5%	⬛ 4.2	
Ireland	🟥 92%		🟥 16.7%	🟥 5.3	
Italy	⬛ 82%		⬛ 14.9%	⬛ 4.6	-0.5▼
Latvia	🟥 88%		⬛ 11.7%	⬛ 3.9	
Lithuania	☐ 86%		⬛ 13.7%	⬛ 4.6	
Netherlands	🟥 87%		🟥 15.8%	🟥 6.5	+0.7▲
Poland	🟥 91%		🟥 18.3%	☐ 5.2	
Portugal	⬛ 84%		⬛ 11.1%	⬛ 4.0	
Romania	🟥 90%		⬛ 14.7%	⬛ 4.2	+0.6▲
Slovakia	🟥 87%		🟥 18.2%	⬛ 4,2	
Slovenia	🟥 87%		⬛ 12.8%	⬛ 4.1	
Spain	⬛ 82%		⬛ 14.8%	⬛ 4.7	
Switzerland	🟥 91%		⬛ 15.0%	☐ 5.2	
UK	☐ 86%		🟥 16.6%	🟥 5.9	

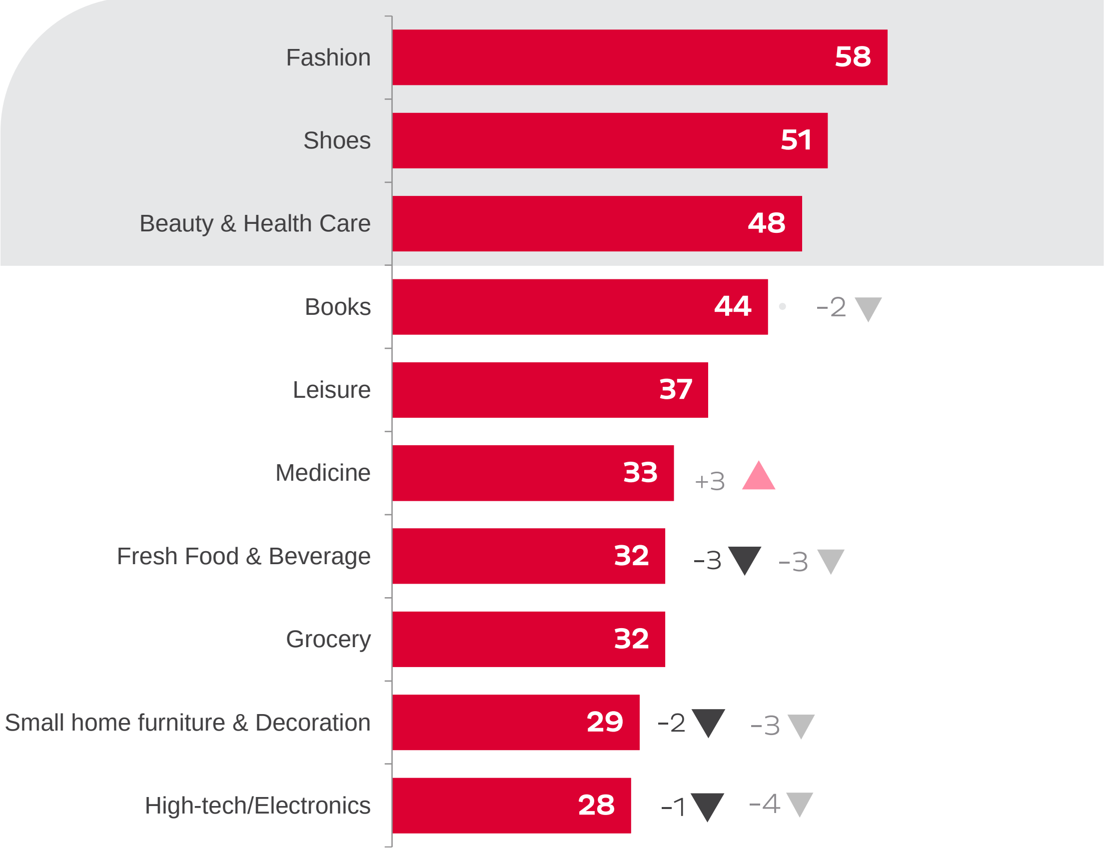
🟥 above European average
☐ equal to European average
⬛ below European average

Significant differences vs. 2022 only

REGULAR E-SHOPPERS POPULAR CATEGORIES

As in 2022, regulars buy about 6 different product categories on average on the Internet. Yet, less regular e-shoppers buy Fresh Food & Beverages, furniture and electronics products online.

% – TOP 10 types of goods purchased online since January



5.9

categories bought on average

Highest average

6.7	POLAND	6.6	IRELAND +0.6 ▲
6.3	ROMANIA	6.2	SWITZERLAND
6.2	GERMANY +0.5 ▲	6.1	UK +0.6 ▲

Lowest average

5.5	BELGIUM	5.5	HUNGARY -0.5 ▼
5.4	SLOVENIA	5.4	FRANCE
5.3	LATVIA	5.1	PORTUGAL

SC2. Since January, what types of goods have you ordered online?

REGULAR E-SHOPPERS' IMAGE OF E-SHOPPING

Over the years, regular e-shoppers remain deeply convinced by the benefits of online shopping, they see it as a way to shop more peacefully than in stores and to save time.

"Shopping online strongly reduces the stress of buying in stores" – %T2B

66%

"Shopping online is so convenient that I use it more and more, even if I must return my purchases sometimes" – %T2B

60%

"Shopping online allows me saves time" – %T2B

76% -2 ▼

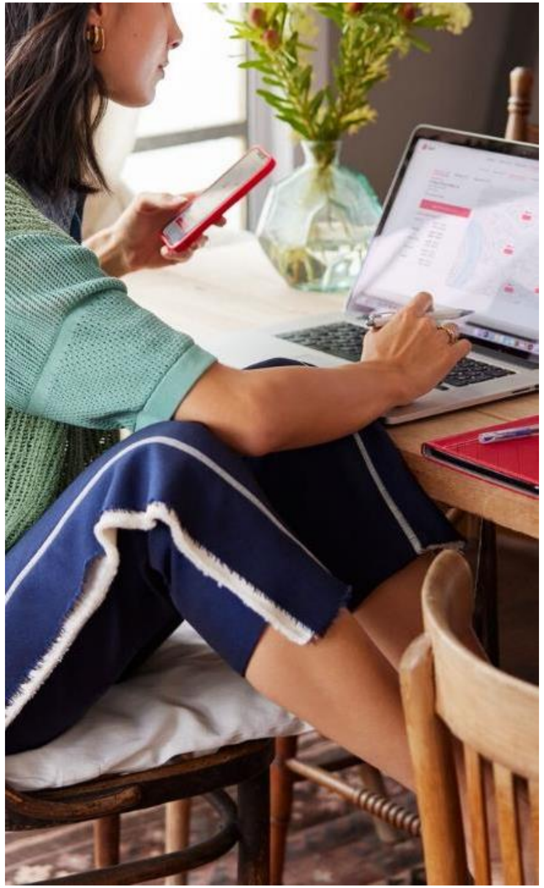
"I can shop for nearly 100% of the products/services I need online" – %T2B

55%

G11 – Here are some statements about shopping. To what extent do you personally agree or disagree with the following statements?)

AFICIONADOS STILL DRIVE E-COMMERCE MOMENTUM

After the increase observed in 2021, Aficionados received slightly less parcels over the last 2 years. Their share in all online purchases remains stable over the years.



2022 **59%**

2021 **56%**

58% − (86)

of all online purchases made by the Aficionados

2022 **21.6%**

2021 **22.0%**

21.3% + (15,3)

Average share of online shopping

(in total shopping – average of all categories)

2022 **7.5**

2021 **7.8**

7.2 + (5.2) ▼

number of parcel received last month

Last purchase preparation

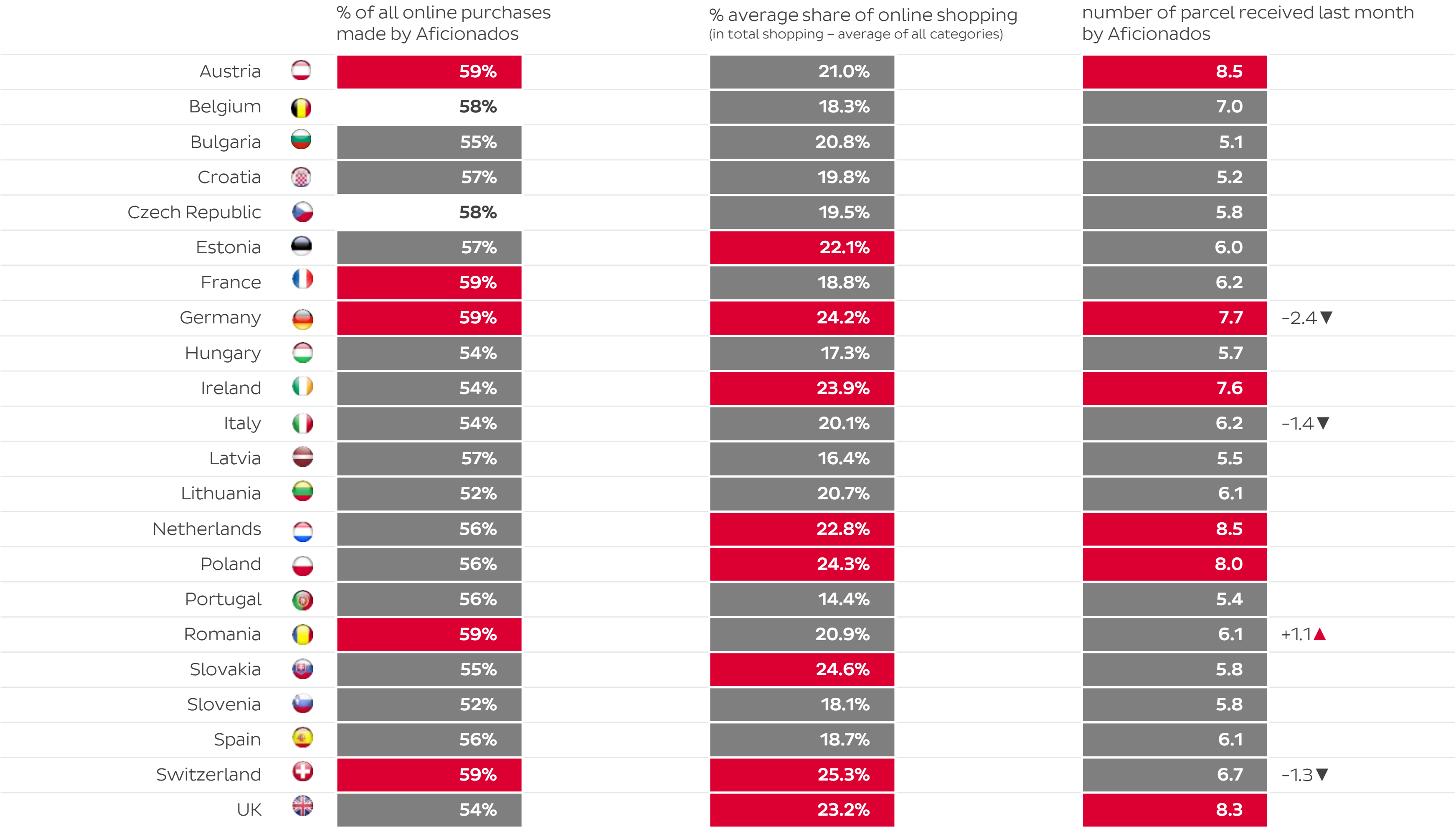
29%

Sudden impulse (last purchase)

+ − vs. regular e-shoppers (xx) at 95% confidence rate

ZOOM ON THE AFICIONADOS

KEY FACTS ABOUT AFICIONADOS COUNTRY ZOOM



	% of all online purchases made by Aficionados	% average share of online shopping (in total shopping – average of all categories)	number of parcel received last month by Aficionados	
Austria	59%	21.0%	8.5	
Belgium	58%	18.3%	7.0	
Bulgaria	55%	20.8%	5.1	
Croatia	57%	19.8%	5.2	
Czech Republic	58%	19.5%	5.8	
Estonia	57%	22.1%	6.0	
France	59%	18.8%	6.2	
Germany	59%	24.2%	7.7	-2.4▼
Hungary	54%	17.3%	5.7	
Ireland	54%	23.9%	7.6	
Italy	54%	20.1%	6.2	-1.4▼
Latvia	57%	16.4%	5.5	
Lithuania	52%	20.7%	6.1	
Netherlands	56%	22.8%	8.5	
Poland	56%	24.3%	8.0	
Portugal	56%	14.4%	5.4	
Romania	59%	20.9%	6.1	+1.1▲
Slovakia	55%	24.6%	5.8	
Slovenia	52%	18.1%	5.8	
Spain	56%	18.7%	6.1	
Switzerland	59%	25.3%	6.7	-1.3▼
UK	54%	23.2%	8.3	

🟥 above European average
☐ equal to European average
⬛ below European average

*New country added in 2022

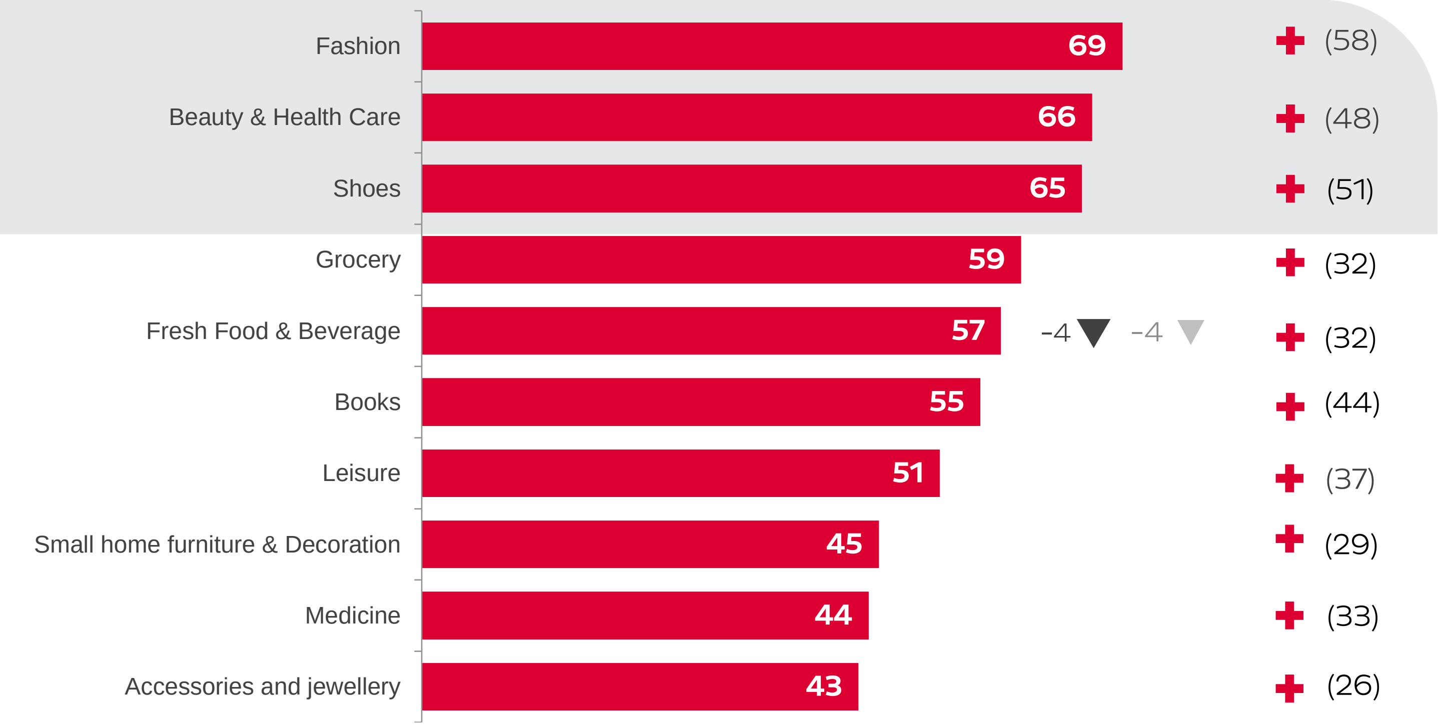
ZOOM ON THE AFICIONADOS

AFICIONADOS POPULAR CATEGORIES

In 2021 and 2022, the Aficionados enlarged the set of categories they bought online. In 2023, they buy as many categories online as in 2022, the only one decreasing being fresh food and beverages.

% – TOP 10 types of goods purchased online since January

All categories are significantly ✚ vs. regular e-shoppers at 95% confidence rate



8.8
2022

8.5
2021

8.6 ✚ (5,9)

categories bought on average

SC2. Since January, what types of goods have you ordered online?

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

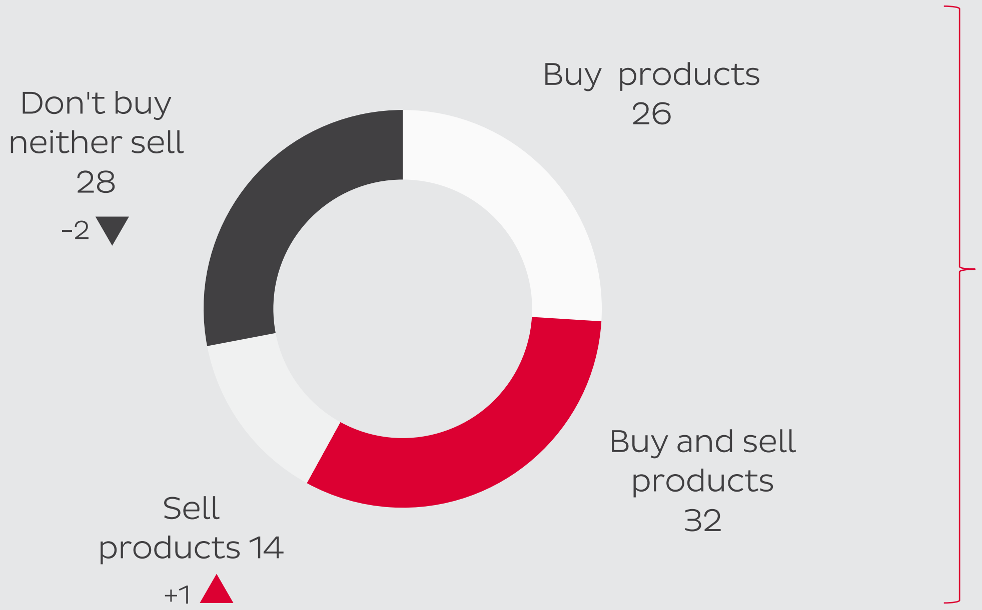
C2C PLATFORM USAGE & SOCIAL MEDIA SHOPPING

Almost 3 in 4 European e-shoppers are using C2C platforms, with more of them selling products via this new way of shopping.

ONLINE SHOPPING BETWEEN INDIVIDUALS

C2C commerce continues to grow, with almost 3 in 4 European regular e-shoppers doing online shopping between individuals in 2023. Most both buy and sell or buy products, yet more regulars sold products in 2023.

% - Buying and selling on second-hand platforms



72% +2 ▲

buy or sell products

M10. Do you buy and/or sell on second-hand platforms (online platforms where individuals, mostly private but sometimes running small businesses, can buy and sell their own goods, often second-hand; e.g. Depop, Ebay etc.)?

Question added in 2022, no comparaison with 2021

REGULAR E-SHOPPERS – FOCUS ON C2C USERS

C2C USERS PROFILE

Female

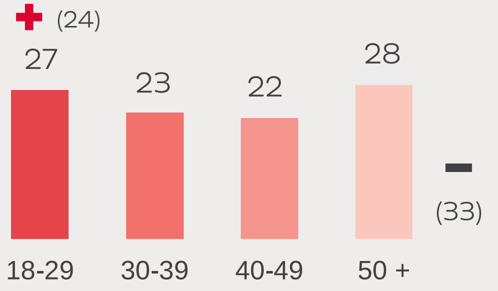
56%

Income

52%
Lower

Age

40.5 y.o ▬ (42.2)



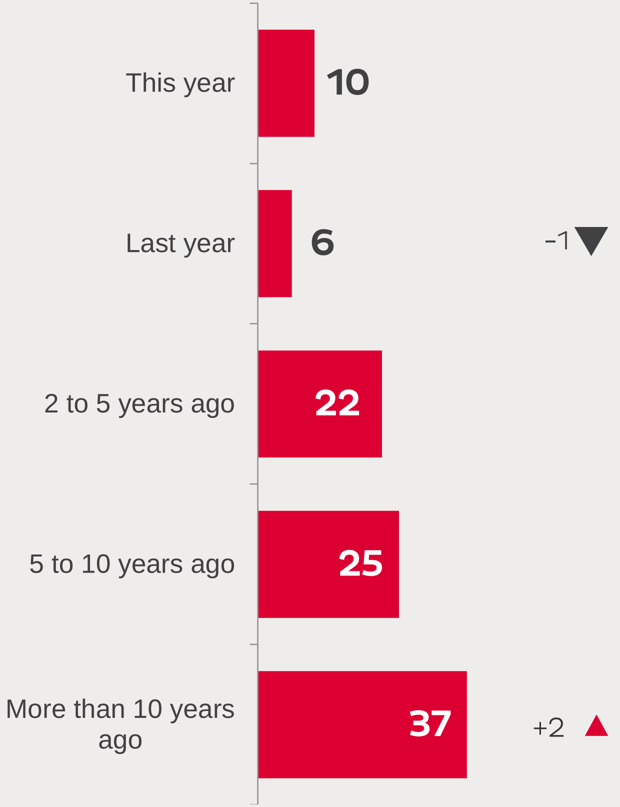
Marital status

44%	Married
31%	Single +2 ▲
17%	Cohabitation
6%	Divorced

City size

86%
Urban

% – Started purchasing online ...



No comparaison with 2021

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

N=8313
RS1; RS2; RS2RECAP; RSX; S2; C1

REGULAR E-SHOPPERS

ONLINE SHOPPING BETWEEN INDIVIDUALS – COUNTRY ZOOM

	Buy	Sell	Annual average purchase frequency
Austria	⬛ 53%	🟥 52%	⬛ 10.6
Belgium	⬛ 56%	🟥 48% -8▼	⬛ 11.4
Bulgaria	🟥 65%	🟥 49%	⬛ 9.2
Croatia	⬛ 57%	⬛ 42%	⬛ 11.0
Czech Republic	⬛ 53%	⬛ 41%	⬛ 11.1
Estonia	⬛ 55%	⬛ 40%	⬛ 9.4
France	🟥 60%	🟥 54%	🟥 13.7
Germany	⬜ 58%	🟥 49%	🟥 12.5
Hungary	⬜ 58%	🟥 51%	⬛ 9.7
Ireland	⬛ 49%	⬛ 30%	⬛ 10.5
Italy	⬛ 53%	⬛ 40%	⬛ 11.3
Latvia	⬛ 51%	⬛ 30%	⬛ 12.0
Lithuania	⬛ 56% +8▲	⬛ 37%	🟥 13.2
Netherlands	⬛ 54% +8▲	🟥 55%	⬛ 11.8
Poland	🟥 67%	🟥 47%	🟥 14.0
Portugal	⬛ 48%	⬛ 45%	⬛ 11.1 +3.0▲
Romania	⬛ 52%	⬛ 29%	⬛ 10.6 +2.5▲
Slovakia	⬛ 56%	⬛ 41%	⬛ 9.7
Slovenia	🟥 61%	🟥 47%	⬛ 9.7
Spain	⬛ 52%	🟥 55%	⬛ 8.3
Switzerland	⬛ 48%	🟥 57%	⬛ 10.9
UK	🟥 64%	⬛ 42% +6▲	🟥 13.0

🟥 above European average
⬜ equal to European average
⬛ below European average

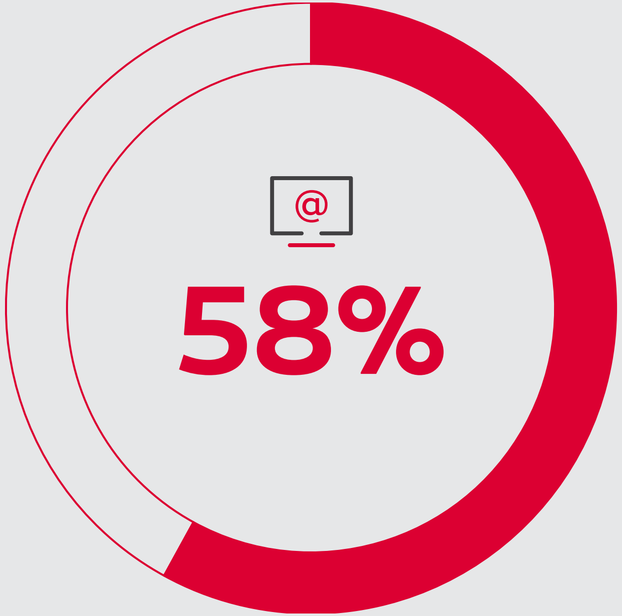
M10. Do you buy and/or sell on second-hand platforms (online platforms where individuals, mostly private but sometimes running small businesses, can buy and sell their own goods, often second-hand; e.g. Depop, Ebay etc.)?

Question added in 2022, no comparaison with 2021

REGULAR E-SHOPPERS

BUYING PRODUCTS ON C2C PLATFORMS

A third of regular e-shoppers claim that they buy more on these platforms than before. And when they buy on them, they purchase quite frequently: 12 times a year.



...buy products on C2C platforms

35%

(% agree & strongly agree)

"I buy **more** second-hand products these days"

Frequency of purchase

(n=6671)

44% at least once a month

29% once every 2 or 3 months

27% less often

12.1 **times per year on average**

M12. How often do you buy on second-hand platforms (e.g. Depop, Ebay etc.)?

Question added in 2022, no comparaison with 2021

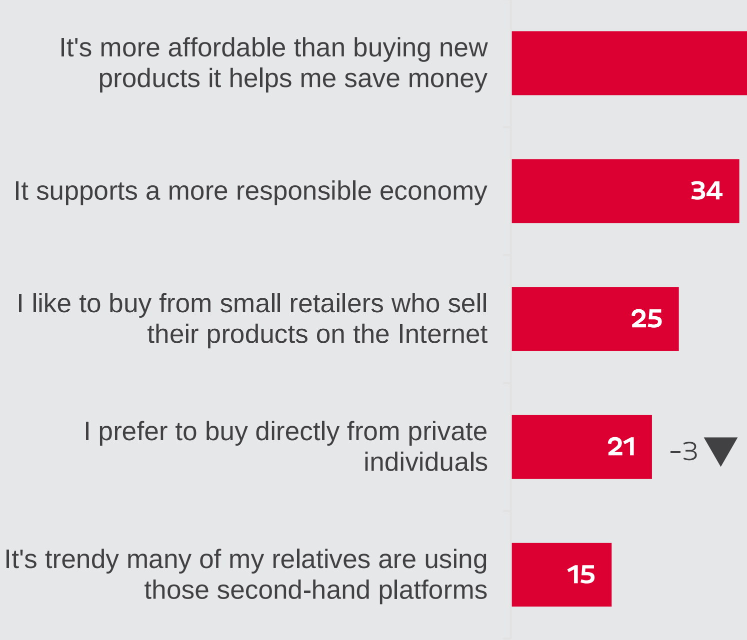
REGULAR E-SHOPPERS

BUYING PRODUCTS ON C2C PLATFORMS

Regulars purchase from individuals mainly because it is less expensive than buying new products. They either use the carrier proposed by the website or the one proposed by the seller, yet 1/3 delivers the parcel by hand directly.

Reasons of purchase – %

(n=6671)



Choice of delivery

49%

Carrier proposed by the website

47% -3 ▼

Carrier chosen by the seller

32%

Hand delivery

M11. When you buy on second-hand platforms (e.g. Depop, Ebay etc.), how do you usually choose to be delivered?
M13. And why do you buy on second-hand platforms (e.g. Depop, Ebay etc.)?

Question added in 2022, no comparaison with 2021

REGULAR E-SHOPPERS

CHOICE OF DELIVERY– COUNTRY ZOOM

	Carrier proposed by the website		Hand delivery		Carrier chosen by the seller	
Austria	45%	+13▲	42%	-8▼	54%	
Belgium	42%		39%		41%	
Bulgaria	51%		29%		46%	
Croatia	42%		54%		41%	
Czech Republic	56%		35%		34%	
Estonia	55%		37%		44%	
France	62%		32%		33%	-10▼
Germany	47%		32%		56%	
Hungary	50%		45%		42%	
Ireland	40%		40%		49%	
Italy	52%		20%		48%	
Latvia	48%		24%	-14▼	43%	
Lithuania	57%	+13▲	19%	-12▼	40%	-11▼
Netherlands	46%		49%	+11▲	41%	
Poland	58%		27%		39%	
Portugal	51%		20%	-29▼	46%	
Romania	45%		30%		53%	
Slovakia	36%		44%		38%	
Slovenia	33%		53%	+16▲	39%	-10▼
Spain	49%	+9▲	64%		30%	
Switzerland	35%		50%		47%	
UK	41%		19%		61%	

🟥 above European average
☐ equal to European average
⬛ below European average

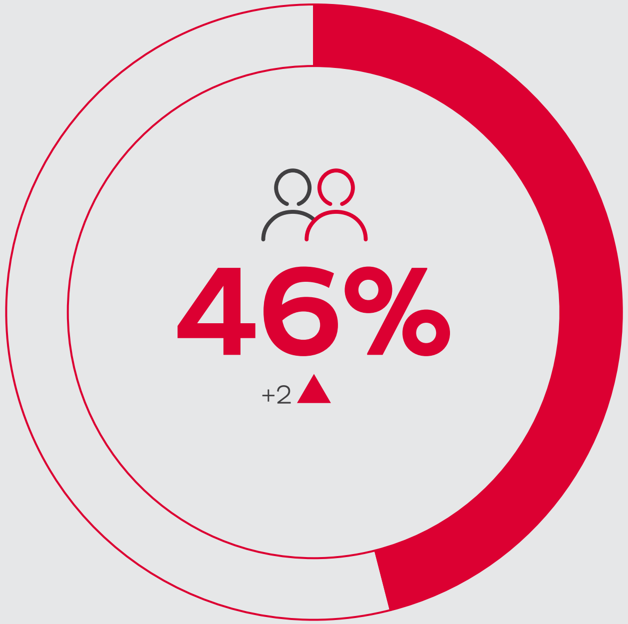
M11. When you buy on second-hand platforms (e.g. Depop, Ebay etc.), how do you usually choose to be delivered?
M12. How often do you buy on second-hand platforms (e.g. Depop, Ebay etc.)?

Question added in 2022, no comparaison with 2021

REGULAR E-SHOPPERS

SELLING PRODUCTS ON C2C PLATFORMS

Regular e-shoppers selling on C2C platforms find them useful firstly as it helps save some space, get rid of products they don't use and as this new e-commerce method allows to earn extra money.



...**sell** products on C2C platforms

Reasons of selling – %

(n=5352)

To free up some space at home	64
Because I have products in good condition that I rarely use	58
To earn extra money	51
To get rid of gifts that I do not like	24
Because it allows me to buy products back on the same platform	15
To help family/friends to sell their products	14
To resell at a higher price products that I bought	10
It's trendy many of my relatives are using those second-hand platforms	9
It's a second activity for me on top of my job	8

M15. Why do you sell on second-hand platforms (e.g. Depop, Ebay etc.)?

Question added in 2022, no comparaison with 2021

REGULAR E-SHOPPERS – FOCUS ON C2C USERS

ONLINE PURCHASE HABITS & ATTITUDES

C2C users buy more product categories than the regular e-buyers overall. They are even more convinced by the benefits of online shopping than regulars.

6.3 + (5.9)

Different types of goods bought since January on average

Top 7 Categories

1. Fashion **59%**
2. Shoes **53%** +(51)
3. Beauty & Health care **48%**
4. Books **46%** +(44)
5. Leisure **39%** +(37)
6. Medicine **34%**
7. Grocery **33%**

45

+3 vs. regulars

-3 vs. 2022

Annual number of purchases

/!\ No significance test on median

15.7%

Average share of online shopping

(on total shopping – average of all categories)

Attitudes specificities vs. regular e-shoppers

(biggest significant gaps vs. regular e-shoppers on % agree & strongly agree)

Positive +

71% I am always on the lookout for a really good deal (69)

67% Shopping online saves money (65)

63% Shopping online is so convenient that I use it more and more, even if I must return my purchases sometimes (60)

62% I actively look for reviews and ask for recommendations online before making a purchase (59)

38% I am almost always among the first to try new ways of shopping or new shopping experiences (34)

43% I buy more second-hand products these days (35)

47% Relative to other people I have more passion about e-shopping (44)

39% I use a lot of collaborative / shared / community services (such as car sharing room sharing ride sharing…) (35)

34% Once I find a brand that satisfies me I usually don't experiment with new ones (30)

56% My mobile is quickly becoming my main shopping tool (53) +2 ▲

No comparaison with 2021

+ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

N=8313
A1;A5;SC2;G11

REGULAR E-SHOPPERS – FOCUS ON C2C USERS

DELIVERY PLACES & PREFERENCES

Delivery at home remains the first delivery place for C2C users as they use 2 delivery places on average. To them to it is important to know the delivery company.

Top 5 – Usual delivery places

72%	26%	25%	17%	12%
▬ (76)	✚ (24)	✚ (23)	✚ (15)	
Home	Parcel shop	Locker station	Post office	At work
-2 ▼	+4 ▲	+3 ▲		

2.0 ✚ (1.9) +0.1 ▲

Delivery places on average

Top 5 – Delivery preferences (importance index – average interest = 100)

/!\ No significance test on index

150	146	131	125	125
Real time information	Several delivery options	To select the day and exact 1-hour window/timeslot in advance of your delivery	Delivery the next day	Possibility to reschedule the delivery
RANKING AMONG REGULAR E-SHOPPERS				
#1	#2	#3	#5	#4

73% ✚ (71)

...consider it important to know the delivery company

No comparaison with 2021

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

N=8313
C14;D15;C16new

SHOPPING THROUGH SOCIAL MEDIA (AMONG SOCIAL MEDIA USERS)

Shopping through social media is a common practice among social media users. They use it in multiple ways, first to find inspiration and collect information, as well as to shop from their relative's recommendation.

Shopping activities done on social networks -%

(Among social media users, n=10893)

70% of social media users use them for at least one shopping purpose

48% ...shop directly from social media

1.8 Activities on average

C2abis. Thinking about the social networks you use, for which of the following do you use them, even if only once in a while?

Question added in 2022, no comparaison with 2021

TO WHAT EXTENT HAS INFLATION IMPACTED E-SHOPPERS?

- In the current inflationary context, regular e-shoppers' are less open to pay a premium for green products and remain very price sensitive. In addition, more consider that buying online saves money
- Aficionados are as price sensitive as their regulars peers, but more bargain hunters

2.

REGULAR E-SHOPPERS

ATTITUDE TOWARDS PRICE

The inflation has not boosted the already high price sensitivity of regular e-shoppers. Nevertheless, more than in 2022 they consider that online shopping allows to save money and less are open to pay an extra for green products.

65% +2 ▲ +3 ▲

of regular e-shoppers consider that shopping online saves money - %T2B

62% +2 ▲

“Price is the most important factor in my purchasing decisions” - %T2B

69%

“I am always on the lookout for a really good deal” - %T2B

53%

“I look forward to big discount events, online or offline, (Black Friday, seasonal sales...)” - %T2B

34%

“I'm ready to pay a price premium for services that make my life easier” - %T2B

39% -2 ▼ -2 ▼

“I'm willing to pay a premium for products/services that are respectful of the environment” - %T2B

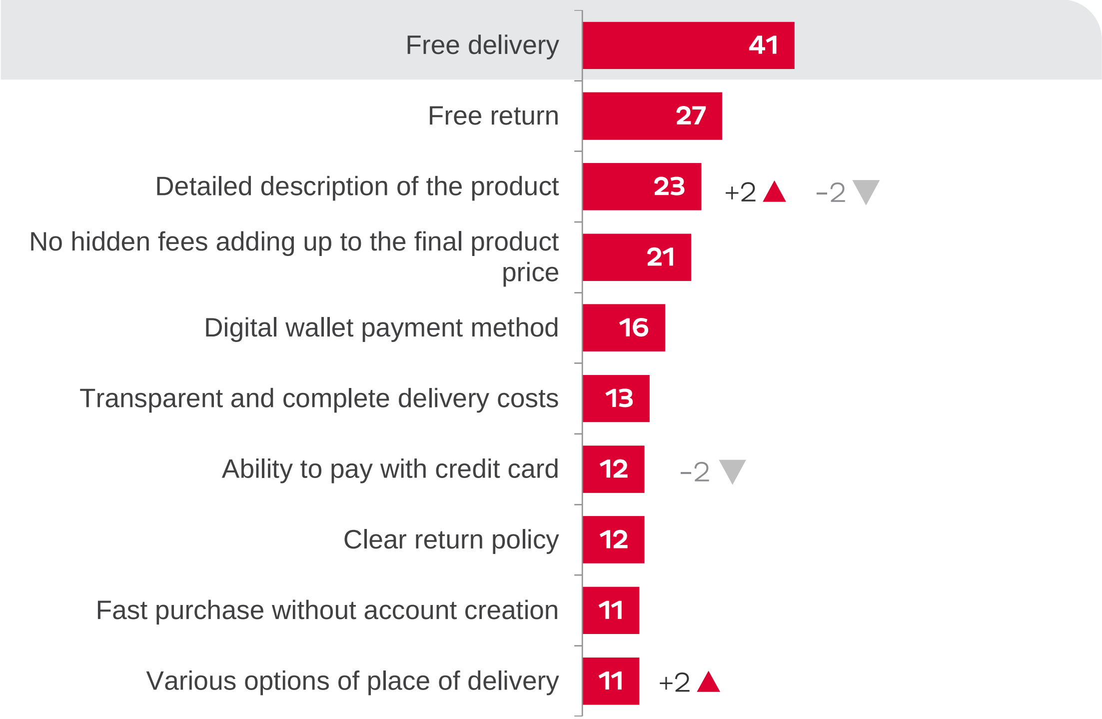
G11 – Here are some statements about shopping. To what extent do you personally agree or disagree with the following statements?)

ONLINE PURCHASE DRIVERS

Free delivery remains by #1 driver of online purchase, followed by free return and the detailed product description, which is gaining in importance – in order to avoid frustration with the product chosen and to have to return it (and to pay for the return in some cases, while regulars expect transparency on return costs)?

Top 10 important criteria when buying online % – (out of 25 criteria)

Items ranked as 1st, 2nd or 3rd most important



1st driver in:

France	54	
Italy	49	
Portugal	49	
Spain	48	
Belgium	47	+7 ▲
Hungary	42	
UK	42	
Lithuania	38	
Croatia	37	+8 ▲
Ireland	36	-8 ▼
Poland	36	
Romania	36	

Biggest evolutions vs. 2022 (apart from TOP10)

11%	Choice in the speed of delivery	-2 ▼
10%	Ability to be told the exact 1-hour time slot delivery	-2 ▼
8%	Transparent and complete return costs	+2 ▲
8%	Ability to re-schedule my delivery	-1 ▼
9%	Ability to return with pick-up from home	-2 ▼

B1a – Among the selected criteria which is the most important for you when buying online? And the second, the third?
Rq: TOP 3 ranking on all answers given

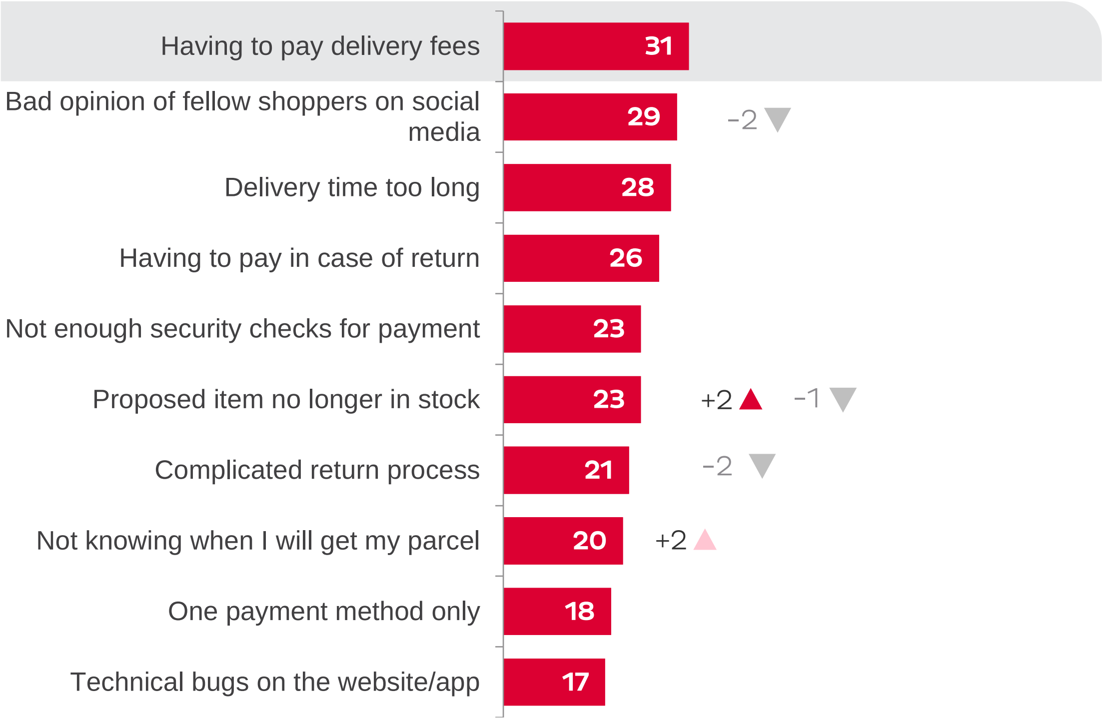
REGULAR E-SHOPPERS

DISSUASIVE EFFECTS

Having to pay for the delivery represents the main barrier to online purchase, followed by bad opinion on social media and too long delivery time.

Top 10 features that prevent the most from buying online % – (out of 16 criteria)

Items ranked as 1st, 2nd or 3rd most important



1st barrier in:

Croatia	44	
Portugal	37	
Austria	36	
France	36	+9 ▲
UK	34	
Belgium	33	
Spain	33	
Germany	32	
Italy	32	
Ireland	30	
Romania	29	+6 ▲
Slovenia	26	

Biggest evolutions vs. 2022 (apart from TOP10)

NO OTHER EVOLUTION

B2a – Among the selected criteria which one prevents you the most from buying online? And the second, the third?
Rq: TOP 3 ranking on all answers given

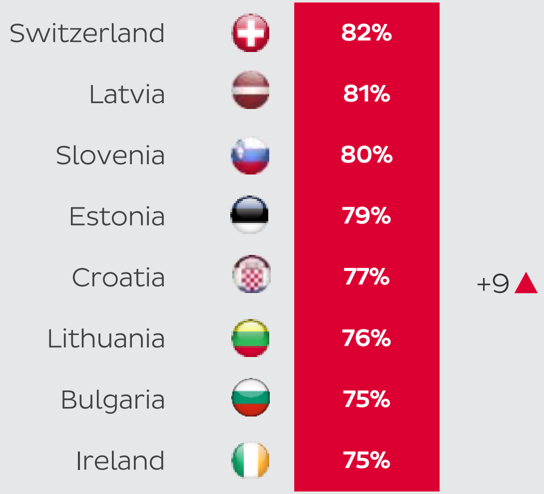
REGULAR E-SHOPPERS

FOREIGN VS. LOCAL

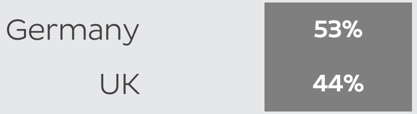
Almost 60% of regular e-shoppers have already made a purchase on a foreign website. Product availability and better offers remain, by far, the main motivations.

of regular e-shoppers have already **bought online from foreign websites**

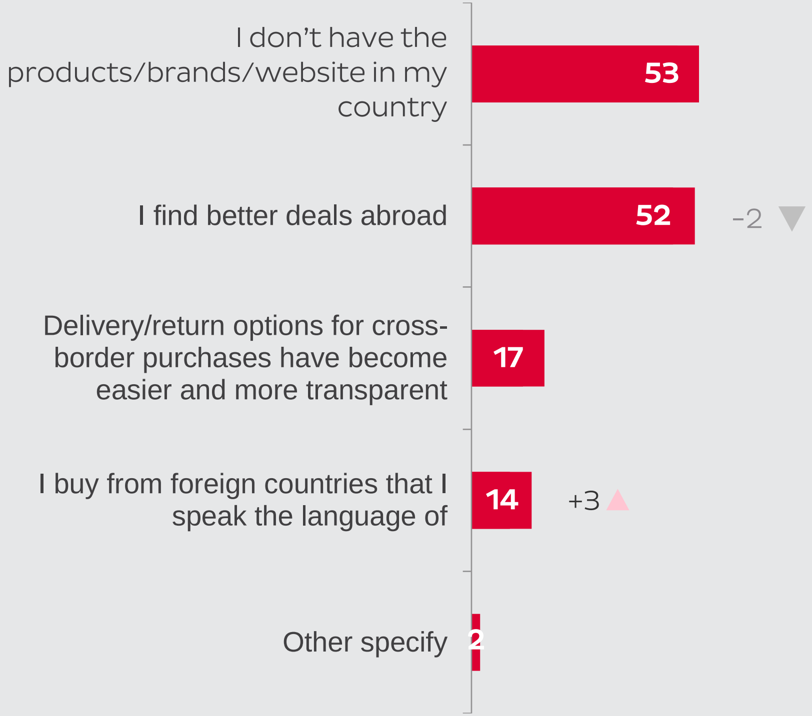
Highest scores



Lowest scores



Reasons to make purchases from foreign websites % (n=6719)



C6 – Have you ever bought online from foreign websites? Rq: We define a foreign website as a website having a different domain name than your local one and/or a website being in a foreign language.
C8 – What were the reasons for you to make purchases from foreign websites?
Base: People that have already bought online from foreign websites
Rq: Several answers allowed

REGULAR E-SHOPPERS

PURCHASES FROM FOREIGN COUNTRIES

The European continent and its sellers are preferred by regular e-shoppers who shop outside their country. Fewer regulars than in 2022 choose China for cross-border online shopping, yet it remains the 1st country by far.

Top 3 most common foreign countries for buying online

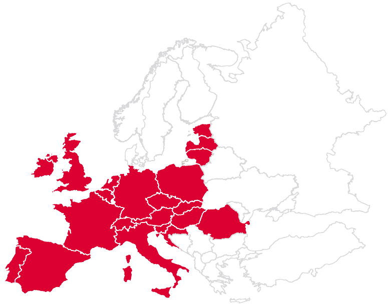
1 China **48%** - 3 ▼ -6 ▼

2 USA **31%**

3 Germany **28%** -3 ▼

65% in other parts of the world

-4 ▼



73% in Europe

45% from neighbouring countries

C7 – From which countries? Base: People that have already bought online from foreign websites (n=6719)
Rq: We define a foreign website as a website having a different domain name than your local one and/or a website being in a foreign language.

ZOOM ON THE PRICE SENSITIVE E-SHOPPERS

Price sensitive e-buyer has been defined as a regular e-shopper which showed price sensitivity by making price the most important factor when purchasing:

- %TB "Price is the most important factor in my purchasing decisions"

N=2503, country weighting applied.

REGULAR E-SHOPPERS – FOCUS ON PRICE SENSITIVE USERS

PRICE SENSITIVITY

Definition

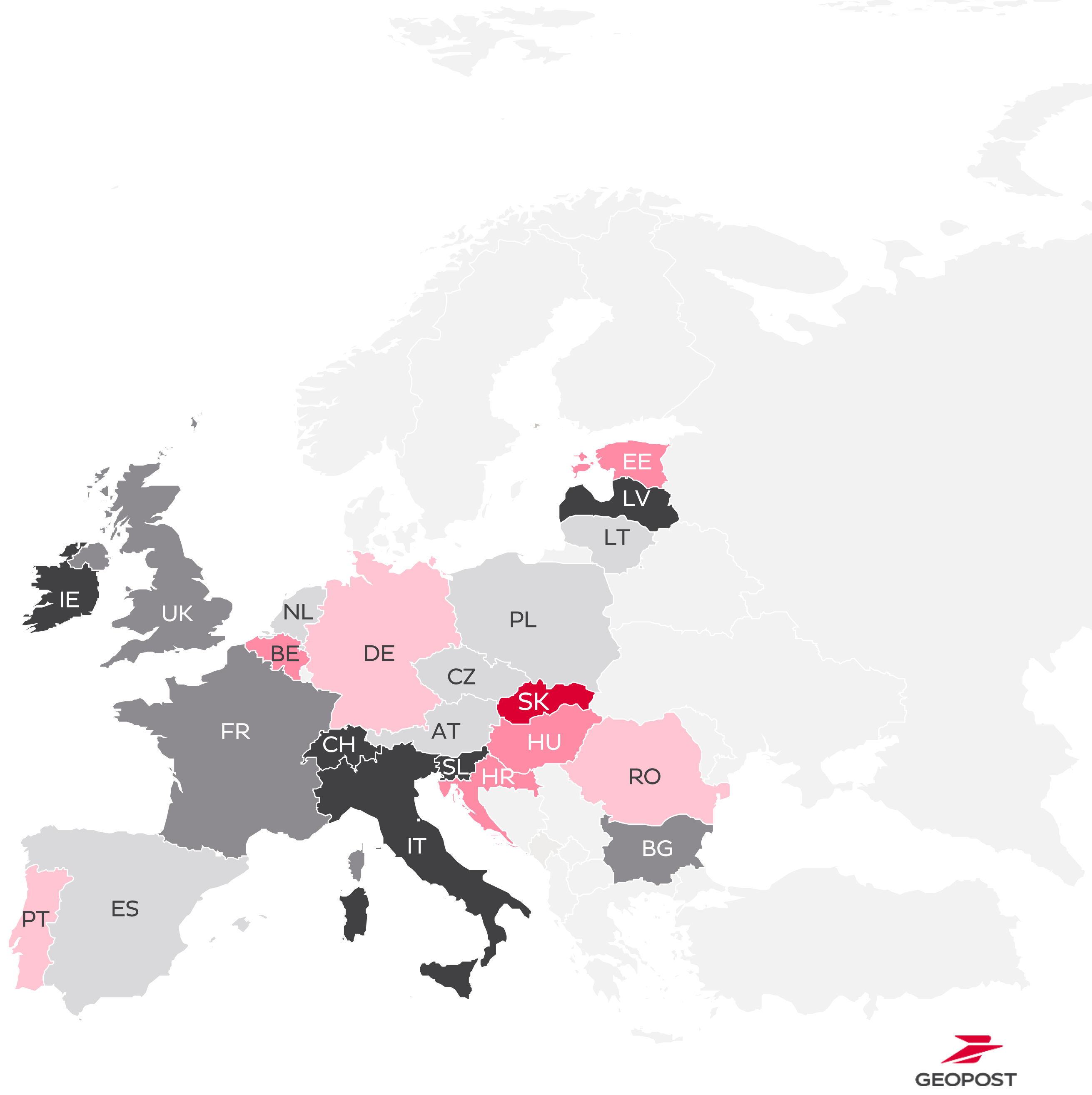
This map illustrates the level of **price sensitivity** within the European countries, giving a benchmark to each market to identify its own position in comparison to the EU average.

Price sensitivity is defined by:

- %T2B "Price is the most important factor in my purchasing decisions"
- %T2B "I am always on the lookout for a really good deal"
- %T2B "I look forward to big discount events, online or offline"
- %B2B "I am ready to pay a premium price for services that make my life easier"
- %B2B "I am willing to pay a premium for a product/service that are respectful of the environment

Legend

More price sensitive vs. EU average 🟥 ⬛ Less price sensitive vs. EU average



REGULAR E-SHOPPERS – FOCUS ON PRICE SENSITIVE USERS

REGULAR PRICE SENSITIVE E-BUYERS PROFILE

Female

61% + (56)

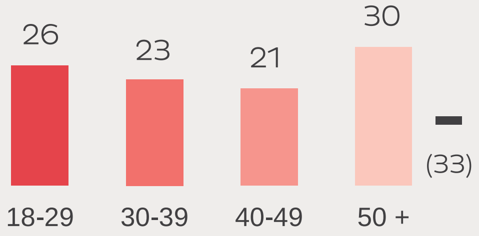
Income

60% + (53)

Lower

Age

41.1 y.o − (42.2)



Marital status

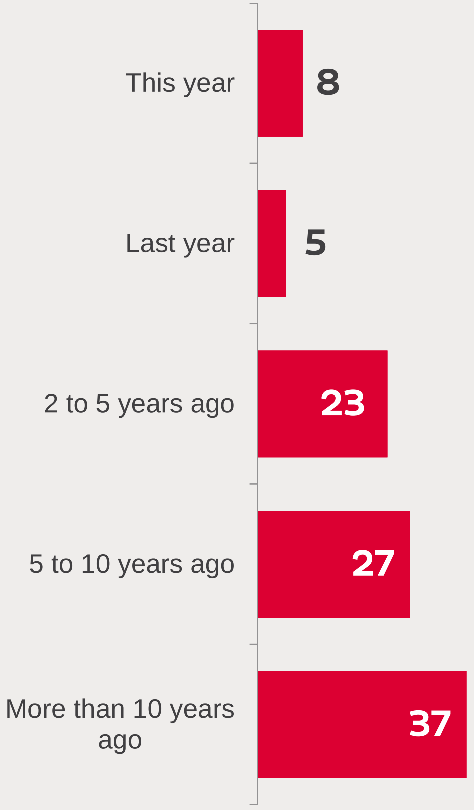
42%	Married
33%	Single
15%	Cohabitation
7%	Divorced

City size

85%

Urban

Started purchasing online ...



N=2503

RS1; RS2; RS2RECAP; RSX; S2; C1

No comparaison with 2021

+ − vs. regular e-shoppers (xx) at 95% confidence rate

GEOPOST

REGULAR E-SHOPPERS – FOCUS ON PRICE SENSITIVE

ONLINE PURCHASE HABITS & ATTITUDES

Price sensitive regulars buy the same categories overall. Unsurprisingly, discounts and good deals are more important to them.

5.9

Different types of goods bought since January on average

Top 7 Categories

1. Fashion **59%**
2. Shoes **51%**
3. Beauty & Health care **50%**
4. Books **41%** ▬ (44)
5. Leisure **36%**
6. Grocery **32%**
6. Medicine **32%**

39 -6 vs. 2022

Annual number of purchases

-3 vs. regular

/!\ No significance test on median

15.3%

Average share of online shopping

(on total shopping – average of all categories)

Attitudes specificities vs. regular e-shoppers

(biggest significant gaps vs. regular e-shoppers on % agree & strongly agree)

Positive ✚

86% I am always on the lookout for a really good deal (69)

86% Shopping online allows me to save time (76)

57% I am now less loyal to any offline or online retailer, because I like to shop around more to find the best offers (45)

67% I look forward to big discount events, online or offline, (Black Friday, seasonal sales...) (53)

75% Shopping online saves money (65)

64% My mobile is quickly becoming my main shopping tool (53)

70% Shopping online is so convenient that I use it more and more, even if I must return my purchases sometimes (60)

N=2503
A1;A5;SC2;G11

No comparaison with 2021

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

REGULAR E-SHOPPERS – PRICE SENSITIVE

DELIVERY PLACES & PREFERENCES

Delivery at home is the first delivery place used by price-sensitive e-buyers as well, and they use the same delivery places overall. Knowing the delivery company is equally important compared to regular e-shoppers.

Top 5 - Usual delivery places

79% ✚ (76)	**24%**	**22%**	**17%**	**10%**
Home	Parcel shop	Locker station	Post-office	At work

1.9
Delivery places on average

Top 5 – Delivery preferences (importance index – average interest = 100)
/!\ No significance test on index

	151	**144**	**135**	**128**	**124**
	Real time information	Several delivery options	To select the day and exact 1-hour window/timeslot in advance of your delivery	Delivery next day	To know the exact 1-hour window of delivery
RANKING AMONG REGULAR E-SHOPPERS	#1	#2	#3	#5	#6

69%
...consider it important to know the delivery company

No comparaison with 2021

N=2503
C14;D15;C16new

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

ZOOM ON THE AFICIONADOS

While the rise of prices starts to have an impact on e-shoppers' purchases, no evolution to notice this year among the Aficionados.

ZOOM ON THE AFICIONADOS

ATTITUDE TOWARDS PRICE

No evolution to notice in terms of price sensitivity among the Aficionados, who are even more bargain hunters than regular e-buyers. In contrary to regular e-buyers, they are still as open as before to pay a premium for green products.

74% ✚(69)

“I am always on the lookout for a really good deal” - %T2B

61%

“Price is the most important factor in my purchasing decisions” - %T2B

61% ✚(53)

“I look forward to big discount events, online or offline, (Black Friday, seasonal sales…)” - %T2B

70% ✚(65) +3 ▲

of Aficionados consider that shopping online saves money - %T2B

45% ✚(34)

“I'm ready to pay a price premium for services that make my life easier” - %T2B

48% ✚(39)

“I’m willing to pay a premium for products/services that are respectful of the environment” - %T2B

G11 – Here are some statements about shopping. To what extent do you personally agree or disagree with the following statements?)

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

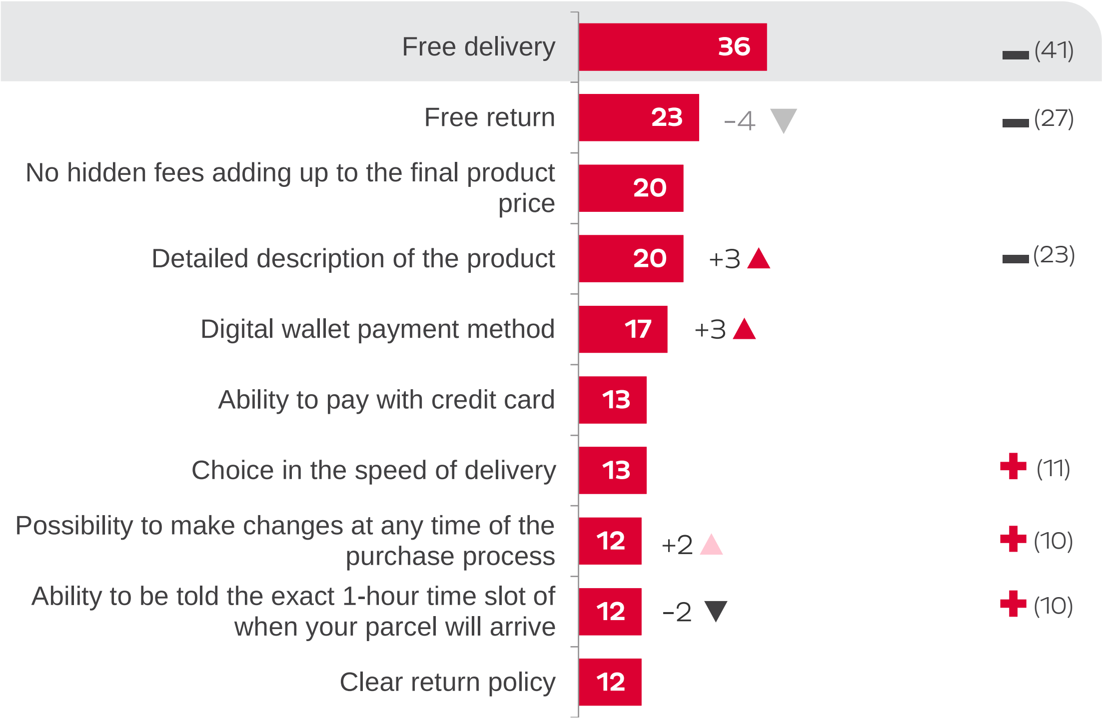
ZOOM ON THE AFICIONADOS

ONLINE PURCHASE DRIVERS

Free delivery represents the 1st driver of online purchase for Aficionados as well, followed by free return and the fact that there are no hidden fees. The detailed description of the product is more important to Aficionados this year too.

Top 10 important criteria when buying online % – (out of 25 criteria)

Items ranked as 1st, 2nd or 3rd most important



1st driver in:

France	50	
Italy	48	
Spain	46	
Portugal	44	
Belgium	41	
Latvia	40	+13▲
Hungary	40	
Croatia	39	
UK	34	
Romania	33	
Bulgaria	32	
Ireland	32	

Biggest evolutions vs. 2022 (apart from TOP10)

No other evolution

B1a – Among the selected criteria which is the most important for you when buying online? And the second, the third?
Rq: TOP 3 ranking on all answers given

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

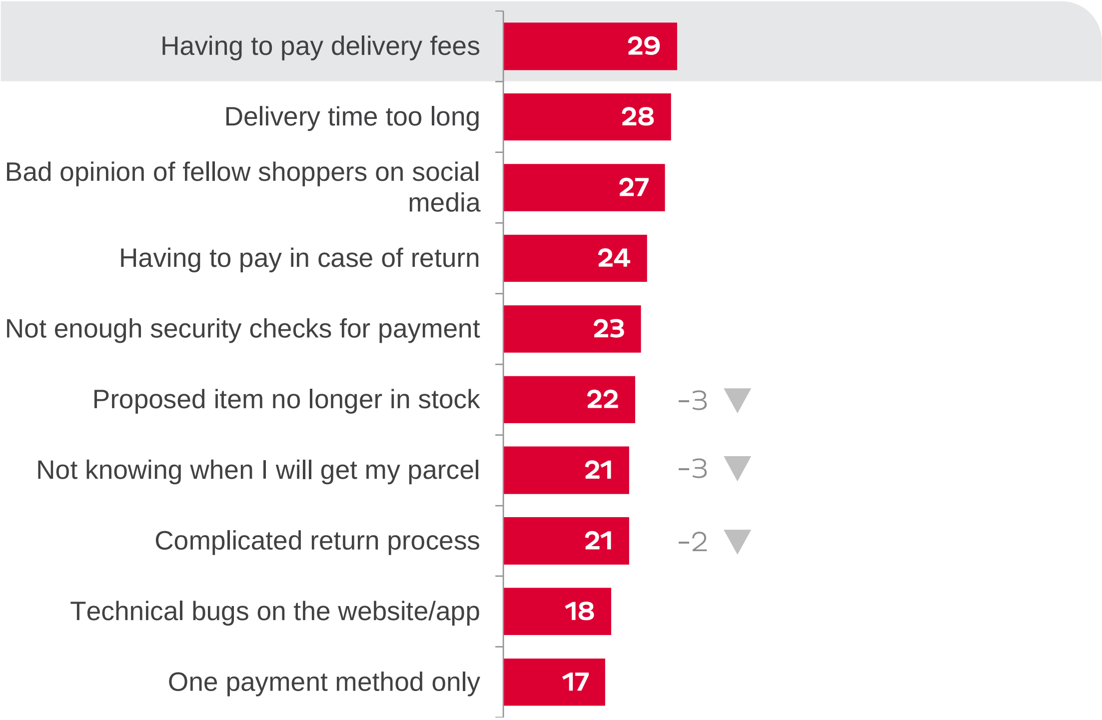
ZOOM ON THE AFICIONADOS

DISSUASIVE EFFECTS

Same barriers to online purchase among Aficionados than among regulars: paying delivery fees, too long delivery time and bad opinion on social media being the top 3.

Top 10 features that prevent the most from buying online % – (out of 16 criteria)

Items ranked as 1st, 2nd or 3rd most important



1st barrier in:

Croatia	42
France	36
Austria	36
Portugal	35
UK	32
Italy	31
Spain	31
Germany	31
Belgium	29
Ireland	30
Slovenia	27
Romania	24

Biggest evolutions vs. 2022 (apart from TOP10)

NO OTHER EVOLUTION

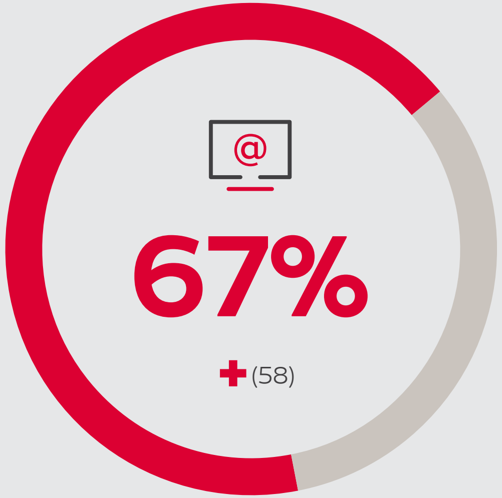
B2a – Among the selected criteria which one prevents you the most from buying online? And the second, the third?
Rq: TOP 3 ranking on all answers given

+ – vs. regular e-shoppers (xx) at 95% confidence rate

ZOOM ON THE AFICIONADOS

FOREIGN VS. LOCAL

Aficionados are more to do foreign purchases than regular e-shoppers: two thirds have already made a purchase abroad. Product availability and better offers remain, by far, the main reasons.



of aficionados have already **bought online from foreign websites**

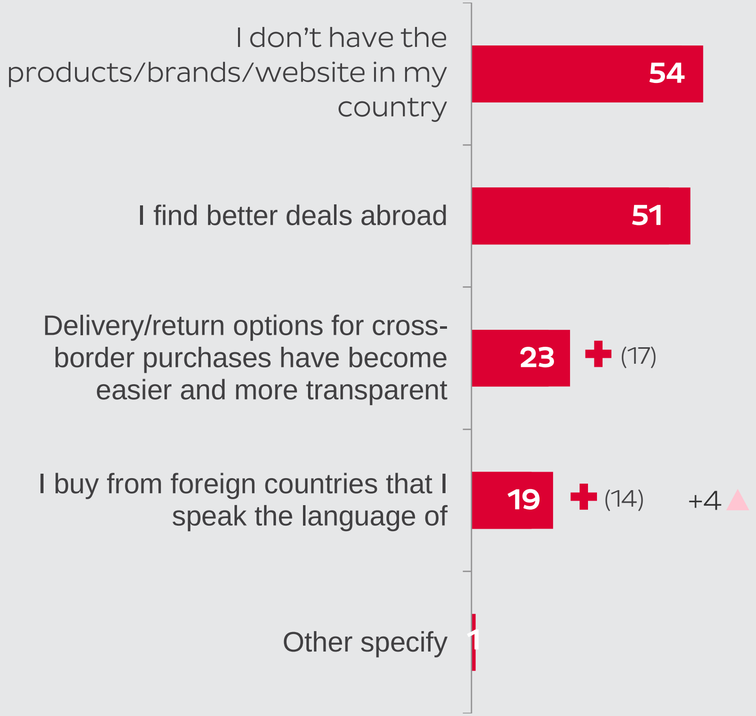
Highest scores

Slovenia	84%	
Latvia	84%	
Switzerland	84%	
Romania	83%	
Estonia	83%	
Croatia	82%	+14▲
Hungary	82%	
Belgium	80%	-10▼

Lowest scores

France	58%
UK	49%

Reasons to make purchases from foreign websites % (n=2434)



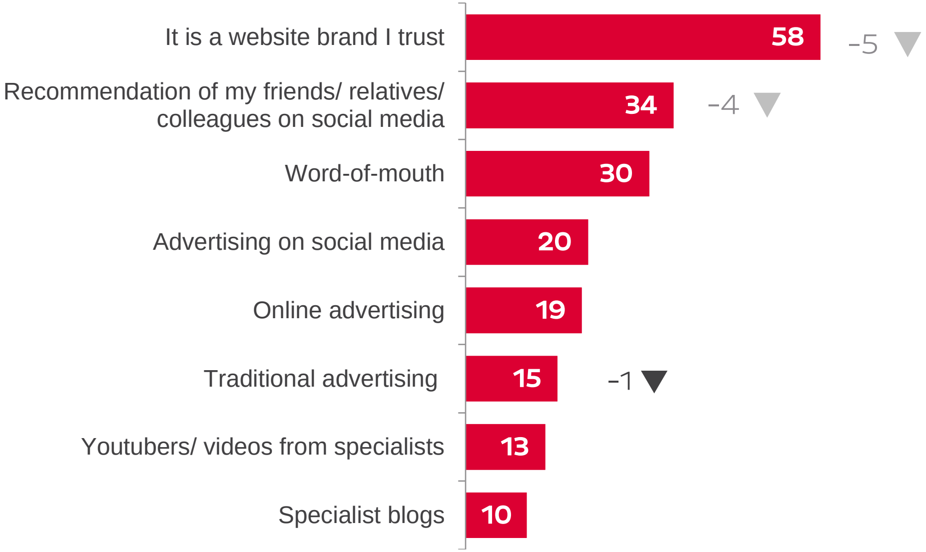
C6 – Have you ever bought online from foreign websites? Rq: We define a foreign website as a website having a different domain name than your local one and/or a website being in a foreign language.
C8 – What were the reasons for you to make purchases from foreign websites?
Base: People that have already bought online from foreign websites
Rq: Several answers allowed

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

REVIEWS AND RECOMMENDATIONS

Trust in website remains the main driver to choose the website, followed by the regular e-shoppers' relative recommendation and word of mouth. Most of regulars share feedback after their purchase.

Drivers when choosing a website/ an app-%



2.0 -0.1 ▼ -0.1 ▼

Average number of influencers

67% -2 ▼ -2 ▼

Share or publish a feedback after purchasing

55% -2 ▼

NET Social Media and influencers

Top scoring countries

Bulgaria	72	
Hungary	70	+7 ▲
Romania	69	-10 ▼
Croatia	69	-9 ▼
Ireland	69	

C18 – When shopping online, how do you choose a website and/or an app?
C19 – Do you publish or give feedback, after purchasing?
Rq: Several answers allowed

WHAT ARE THE MAIN TRENDS OF DELIVERY?

- After several years of decline, the perception of e-shopping/delivery experience has stabilised, but has not increased back
- More regular e-shoppers are getting delivered out-of-home than in 2022, namely in parcel shops and locker stations
- The perception of the delivery and online purchase effort remains stable but has not increased back

3.

TOP DELIVERY PREFERENCES

Being informed on delivery in real time remains by far a top expectation of European regular e-shoppers. Having several delivery options and selecting day and time-window in advance for delivery are going up in the ranking.

Delivery preferences (importance index – average interest = 100)

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 1-hour window of the delivery	Advanced notifications (within a one-hour window)
152	143	134	126	125	123	118

RANKING IN 2022

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 1-hour window of the delivery	Advanced notifications (within a one-hour window)
#1	#3 +1	#2 -1	#5 +1	#6 +1	#4 -2	#7

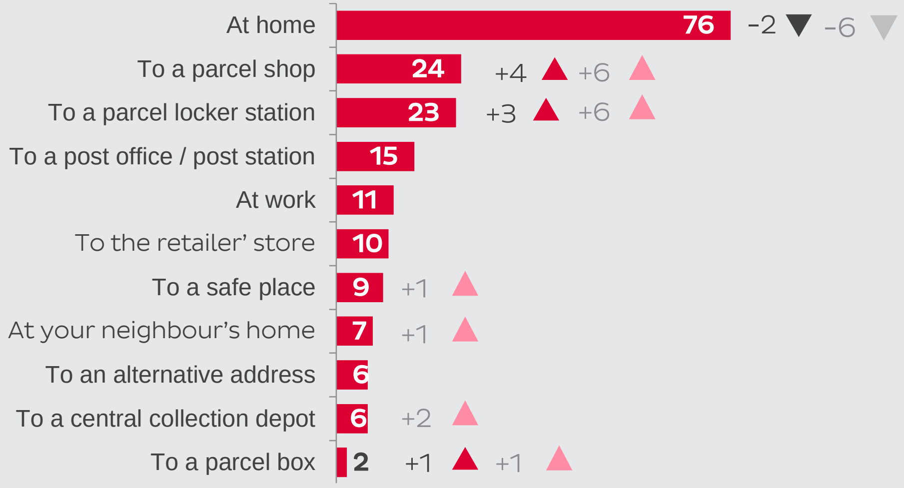
C16new – What delivery options are important to you when choosing an online retailer?
Please select one option that is THE MOST IMPORTANT, and another one that is the LEAST IMPORTANT to you.
Rq: Maxdiff module – the items are displayed 4 at a time on 7 different screens, each time the respondent selects the most and least important

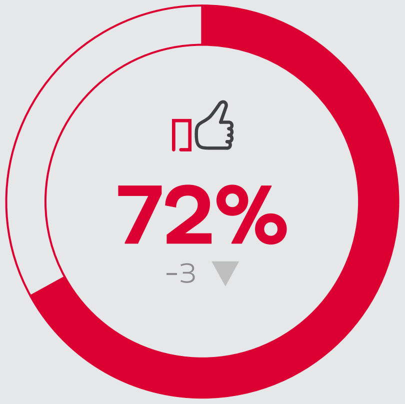
REGULAR E-SHOPPERS

DELIVERY PREFERENCES

The use of parcel lockers continues to increase in 2023, and more regulars use parcel shop this year too. Most regular found the delivery easy.

Usual delivery places-%





... found delivery easy/effortless

1.9 +0.1 ▲ +0.1 ▲ Delivery places on average

51% +7 ▲ +3 ▲

Usually use more than one delivery place

44% +9 ▲ +5 ▲

Are delivered out of home (parcel locker, parcel shop or retailer store)

D14. How much effort did you have to put into the delivery (e.g. tracking, picking up, receiving, etc...) of your last online purchase?
C14. Where do you usually have your parcels delivered to?

REGULAR E-SHOPPERS

DELIVERY PREFERENCES – COUNTRY ZOOM

	At home	Post office	Parcel shop	Retailer store	Alternative address	Parcel locker	At neighbour's home	At work	Central collection depot	Safe place	NET Out of Home
Austria	**80**	**13**	12	6	4	**15**	9	7	5	11	25
Belgium	**74**	**17**	**29**	12	9	10	12	8	5	14 4 ▲	42
*Bulgaria	**56** -6 ▼	**38**	**31**	10	11	11 4 ▲	3	24	15 7 ▲	3	44
Croatia	**83**	**28** 13 ▲	8	10	6	**23** 16 ▲	6	14	7	5	34 15 ▲
Czech Republic	**66**	33	**53**	19	10	**35** 9 ▲	8	15	8	–	69
Estonia	**49**	**28**	7	9	3	**83**	–	8	6	–	89
France	**79** -5 ▼	15	**59**	**16**	3	9	4	5	3	4	68
Germany	**78**	13 3 ▲	19 4 ▲	7	5	**24**	15	10	6	**21**	36 5 ▲
Hungary	**70** -10 ▼	28 -6 ▼	**31**	8	14	**50** 16 ▲	6	17	5 4 ▲	9	60 14 ▲
Ireland	**80**	9	7	11	7	8	9	**14**	7	**12**	20
Italy	**75**	7	**21** 7 ▲	7	6	**23** 5 ▲	–	10	3	–	39 8 ▲
Latvia	**51**	**49**	20	12	7	**69**	–	8	7	–	77
Lithuania	**54** -10 ▼	**29**	14	15	4	**76** 11 ▲	–	9	11	–	84 10 ▲
Netherlands	**75**	12	**25**	9	7	10 4 ▲	**15**	7	9	12 4 ▲	36
Poland	**58** -7 ▼	18	**21**	12	6	**68**	7	12	7	7	79
Portugal	**70** -12 ▼	12	11	**15**	11	9	–	**33** 8 ▲	8	–	27
Romania	**79**	18 -7 ▼	9	5	7	**31** 6 ▲	4	**19**	8	–	38
Slovakia	**68** -8 ▼	**31**	**51** 9 ▲	21	9	**31** 9 ▲	–	21	8	–	68 9 ▲
Slovenia	**77**	**30** 12 ▲	11	9	3	**28** 12 ▲	3	15	5	5	37 9 ▲
Spain	**82**	**24**	**21** 5 ▲	12	9	17	–	15	3	–	38
Switzerland	**58** -17 ▼	**16** 6 ▲	**16** 5 ▲	**16** 9 ▲	14	15	10	15 7 ▲	11	15 6 ▲	38 14 ▲
UK	**83** 4 ▲	10	11	10	4	**12** 3 ▲	8	8	5	**17**	25

*New country added in 2022

🟥 Top 3 preferences

GEOPOST

OUT OF HOME USERS PROFILE

Female

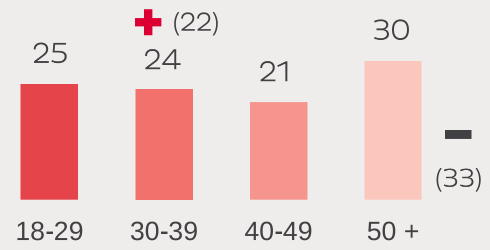
56%

Income

52%
Lower

Age

41.2 y.o ▬ (42.2)



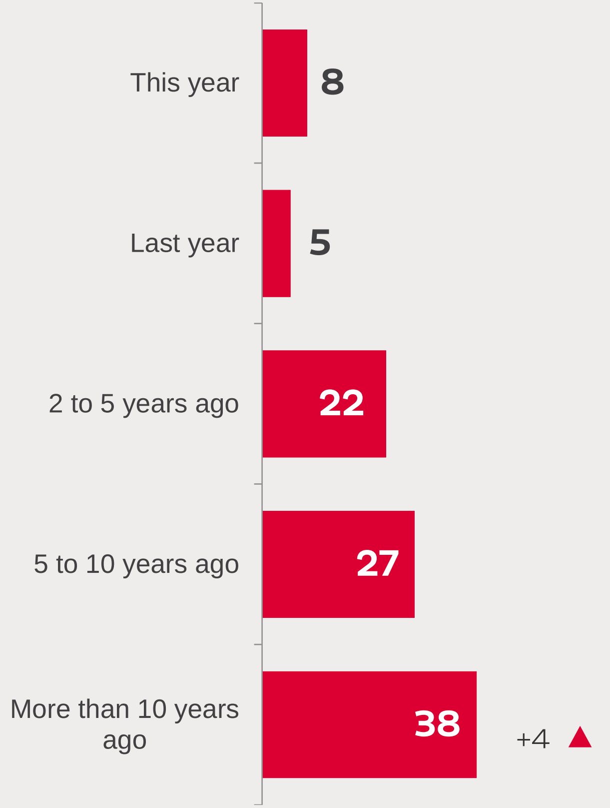
Marital status

45%	Married
31%	Single
16%	Cohabitation -2 ▼
6%	Divorced

City size

88%
Urban

% – Started purchasing online …



No comparaison with 2021

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

N=5045
RS1; RS2; RS2RECAP; RSX; S2; C1

REGULAR E-SHOPPERS – FOCUS ON OOH USERS

ONLINE PURCHASE HABITS & ATTITUDES

OOH users buy more product categories than the regular e-buyers overall, as more of them by shoes, beauty and books on the internet. More of them search for recommendations and reviews when buying online and influence others as well.

6.4 ✚ (5,9)

Different types of goods bought since January on average

Top 7 Categories

1. Fashion **59%**
2. Shoes **53%** ✚ (51)
3. Beauty & Health care **51%** ✚ (48)
4. Books **47%** ✚ (44)
5. Leisure **38%**
6. Medicine **35%**
7. Fresh Food & Beverage **32%** -5 ▼

44

+2 vs. regular

-3 vs. 2022

Annual number of purchases

/!\ No significance test on median

15.9%

Average share of online shopping

(on total shopping – average of all categories)

Attitudes specificities vs. regular e-shoppers

(biggest significant gaps vs. regular e-shoppers on % agree & strongly agree)

Positive ✚

61% I actively look for reviews and ask for recommendations online before making a purchase (59)

56% My mobile is quickly becoming my main shopping tool (53)

50% My friends and family really rely on and trust my advice about new ways of shopping or new shopping (48)

47% I prefer to shop on websites/apps that also have physical stores (44)

40% I buy more second-hand products these days (35)

37% I am almost always among the first to try new ways of shopping or new shopping (34)

72% I follow or like brands on social networking sites (68)

38% I use a lot of collaborative / shared / community services (such as car sharing room sharing ride sharing…) (35)

49% I really like the idea of technology that 'knows' me and can make recommendations and take actions based on my wants and needs (45)

61% It is important to indulge myself on a regular basis (58)

No comparaison with 2021

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

N=5045
A1;A5;SC2;G11

REGULAR E-SHOPPERS – FOCUS ON OOH USERS

DELIVERY PLACES & PREFERENCES

Delivery at home remains the first delivery place for OOH users as they use 2.6 delivery places on average. To them to it is important to know the delivery company.

Top 5 – Usual delivery places

65%	**54%**	**53%**	**23%**	**23%**
▬ (76)	✚ (24)	✚ (23)	✚ (15)	✚ (10)
Home	Parcel shop	Locker station	Post office	Click & Collect
	+3 ▲			-3 ▼

2.6 ✚ (1.9)
Delivery places on average

Top 5 – Delivery preferences (importance index – average interest = 100)
/!\ No significance test on index

	174	**151**	**132**	**131**	**120**
	Several delivery options	Real-time information	Select the day and 1-hour window in advance for delivery	Possibility to reschedule the delivery	Next day for delivery
RANKING AMONG REGULAR E-SHOPPERS	#2	#1	#3	#4	#5

73%
…consider it important to know the delivery company

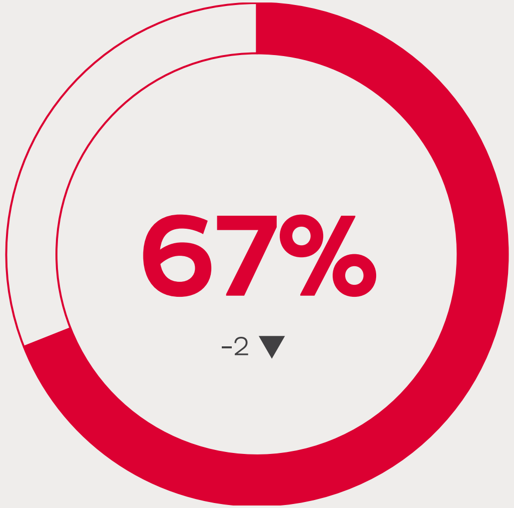
No comparaison with 2021

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

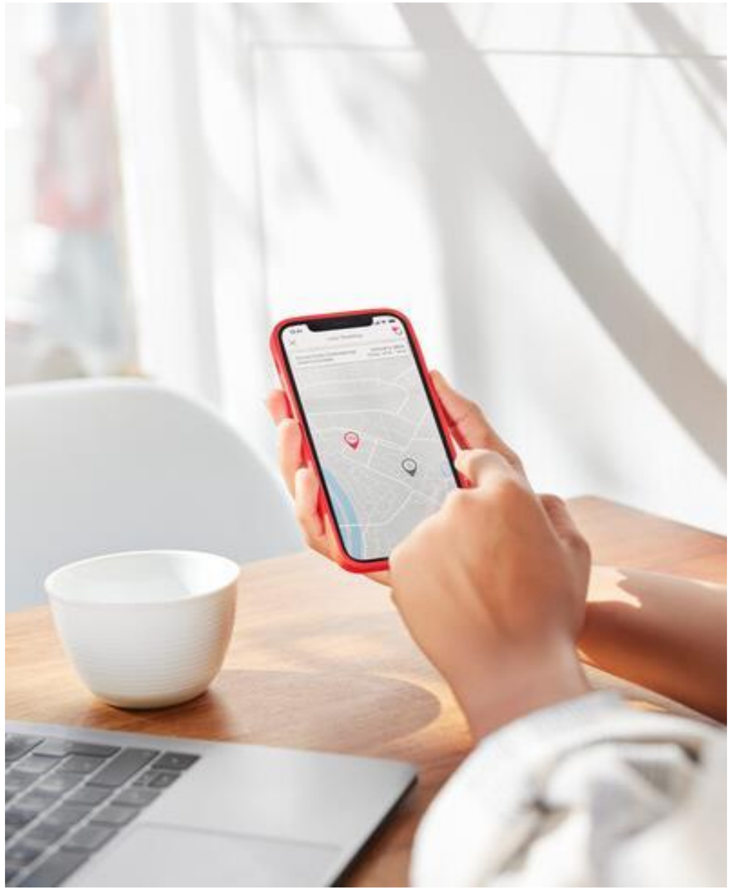
N=5045
C14;D15;C16new

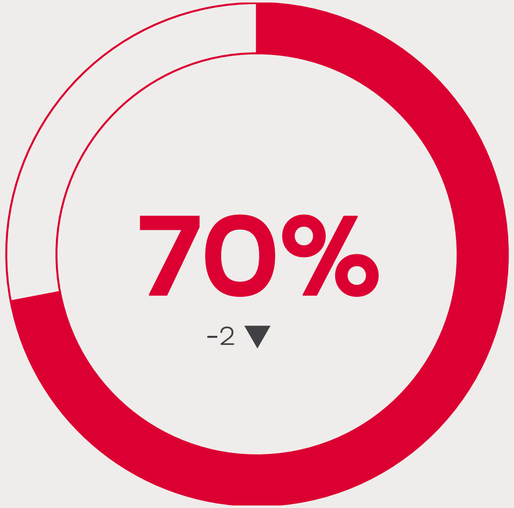
IMPORTANCE OF DELIVERY SERVICES

In terms of delivery services, being informed about the exact 1-hour delivery timeslot and being able to choose the specific day/time of delivery remain important to 2 in 3 regular e-shoppers, yet it appears as less important than last year.



Consider that **knowing the exact 1-hour window/timeslot of their delivery** would make them more likely to purchase from a website /retailer/app
(% agree & strongly agree)





Consider that the ability to **select the day and exact 1-hour indow/timeslot in advance of their delivery** would make them more likely to purchase from a website/retailer/app
(% agree & strongly agree)

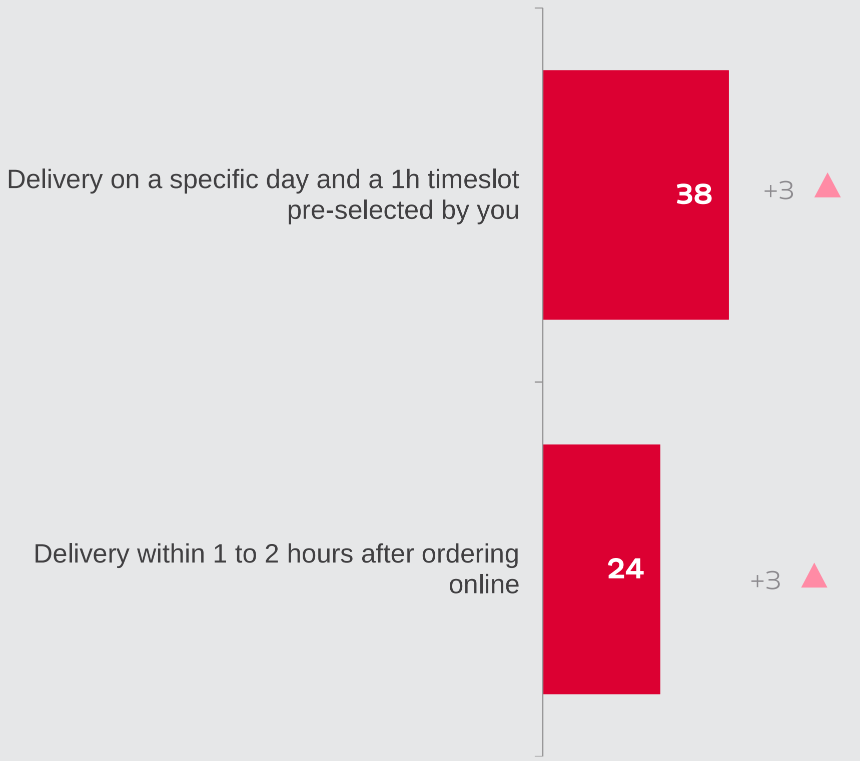
C17. Would knowing the exact 1-hour window/timeslot of your delivery make you more likely to purchase from a website/retailer/app?
C17bis. Would the ability to select the day and exact 1-hour window/timeslot in advance of your delivery make you more likely to purchase from a website/retailer/app?

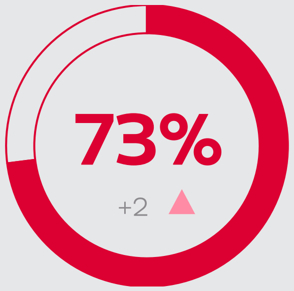
REGULAR E-SHOPPERS

USE OF DELIVERY SERVICES

Most regulars were notified for their last purchase, while less than 4 in 10 were delivered on a specific day and 1 hour slot, and even less within 1 to 2 hours after ordering online, and these services are not more used than in the past.

Delivery services already used–%





... were notified via email or SMS for their last purchase

Highest average

91% HUNGARY +5 ▲

90% ROMANIA

90% CROATIA +7 ▲

88% SLOVAKIA

85% BULGARIA

84% SLOVENIA

84% CZECH REPUBLIC

83% POLAND

Lowest average

75% NETHERLANDS

73% BELGIUM

72% GERMANY

71% +7 ▲ SWITZERLAND

70% ITALY

70% UK

66% SPAIN

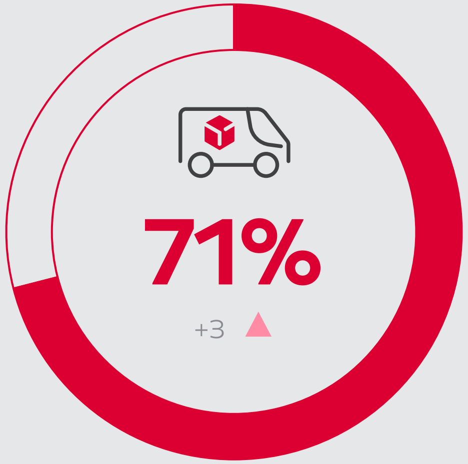
63% FRANCE

G1 – Have you already used the following delivery services?
D10. On the day of delivery, did you receive an email or SMS notification to indicate you the approximate time your parcel will arrive?

REGULAR E-SHOPPERS

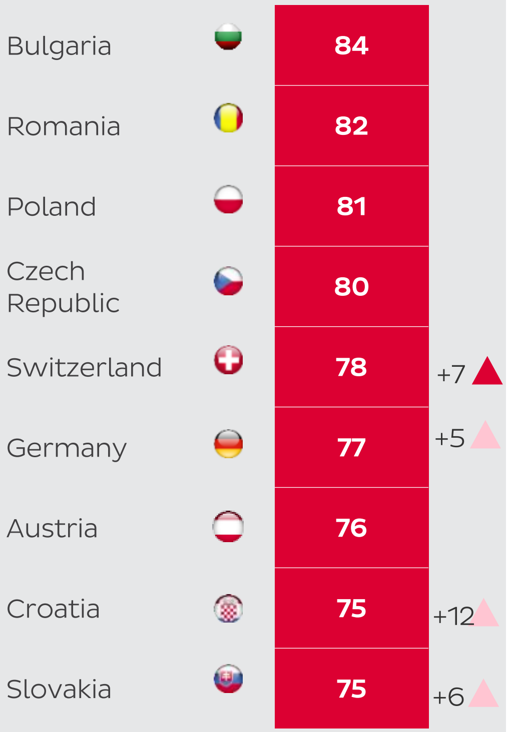
DELIVERY COMPANY

Trust in the delivery company remains important to more than 70% of European regular e-shoppers, especially for reasons of peace of mind and will to choose a carrier offering a good delivery service.

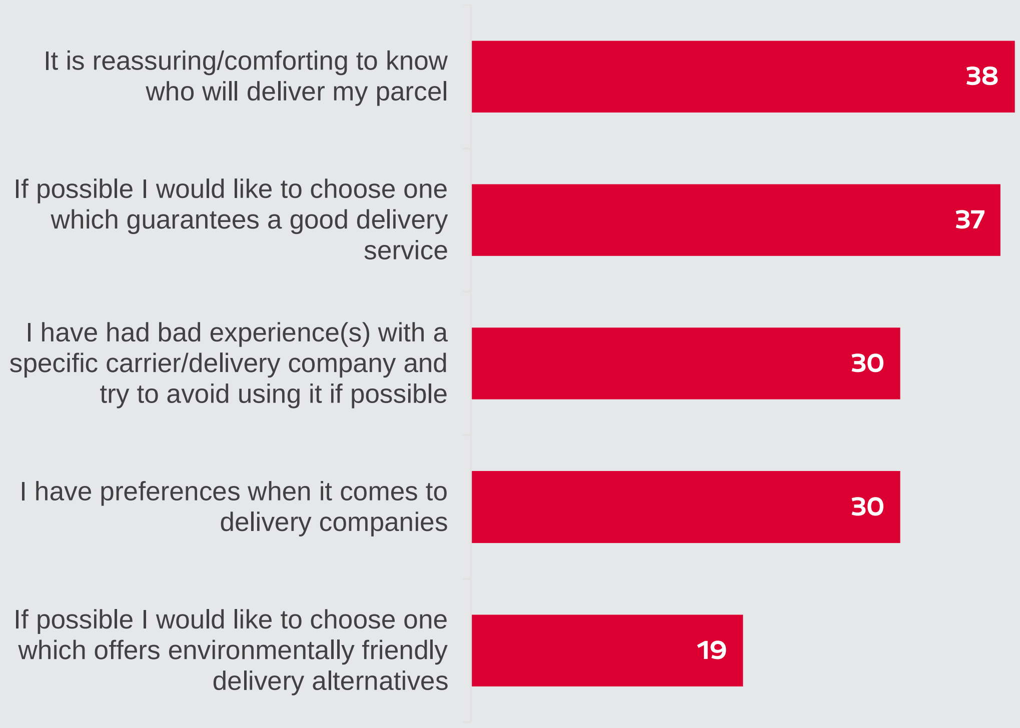


...consider it important to know the delivery company

Top scoring countries



Reasons of importance to know the delivery company % (n=8219)



D15. In your opinion, is it important to know who the delivery company will be, before finalizing the purchase?
D16. You said that for you it is important to know who the delivery company will be, before finalizing your purchase. Which of the following reasons apply to you? Base :think that it is important to know the delivery company before finalizing the purchase
Rq: several answers allowed

REGULAR E-SHOPPERS

GREEN DELIVERY ALTERNATIVES

Despite a decrease, eco-friendly deliveries remain important for almost 6 in 10 regulars. Such options first mean be delivered with low-emission vehicles and for all products together. Out of home and slow delivery are seen as more environmentally friendly than last year.

58%
-2 ▼

Consider that having choice of environ-mentally friendly delivery alternatives is important when buying online

92% for transparent/complete delivery costs -1 ▼

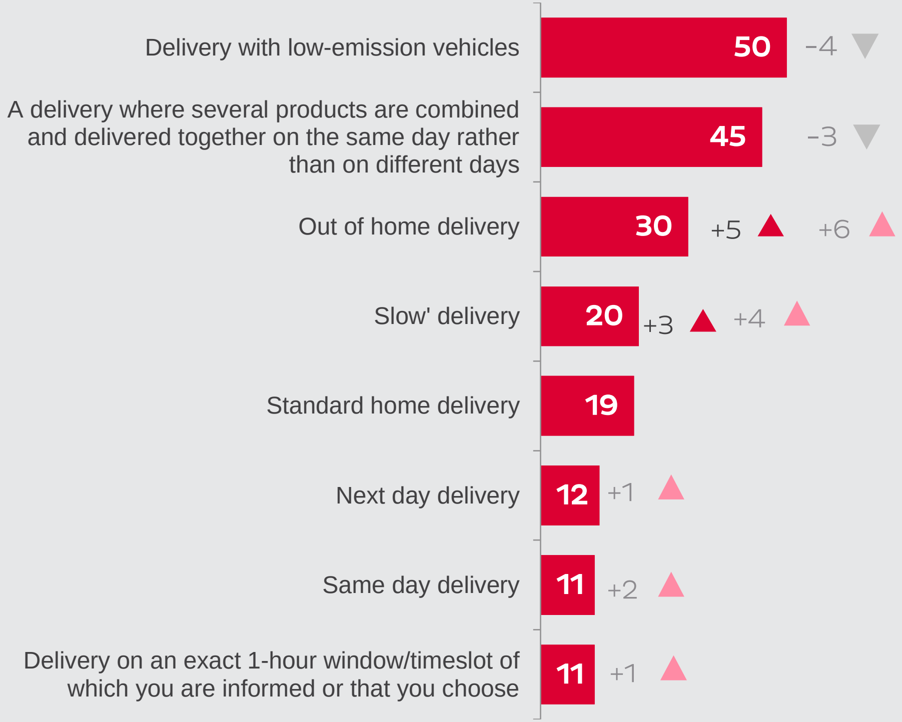
87% for free delivery

75% for various options of place of delivery +2 ▲ +1 ▲

64%

would be more likely to opt for a website/ retailer/ app that has environmentally- friendly delivery options - %T2B

Delivery options perceived as environmentally friendly - %



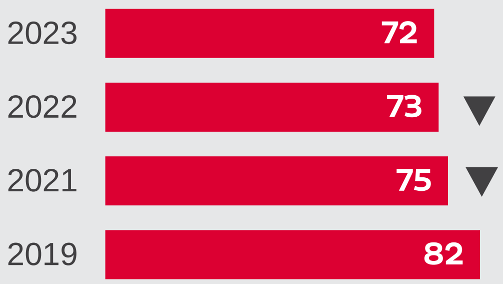
B1. You will now see a list of criteria which may or may not be important to you when buying online. Which criteria are important for you?
C16bis. Still thinking about the delivery, which of the following delivery options would you consider to be environmentally-friendly?
C17ter. Would you be more likely to opt for a website/retailer/app that has environmentally-friendly delivery options?

REGULAR E-SHOPPERS

EFFORT AND SATISFACTION VS. ONLINE PURCHASE

After the decrease in 2022, regulars' perception of the delivery effort and last online purchase effort remains stable this year but is not back to the levels observed in the past.

% - Delivery effort

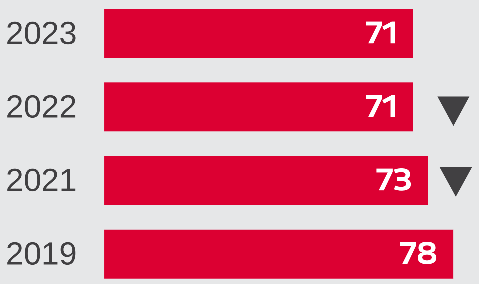


... found the delivery easy/ effortless

Biggest evolutions vs. 2022

Lithuania	+6	▲
Switzerland	-15	▼

% - Last online purchase effort

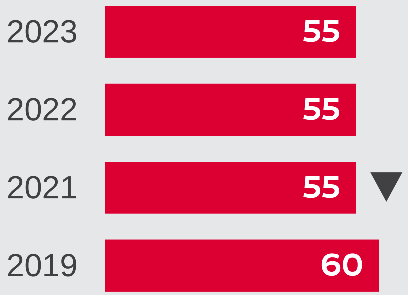


... consider their last online purchase as easy

Biggest evolutions vs. 2022

UK	+6	▲
Germany	-6	▼
Austria	-7	▼
Switzerland	-12	▼

% - Return effort

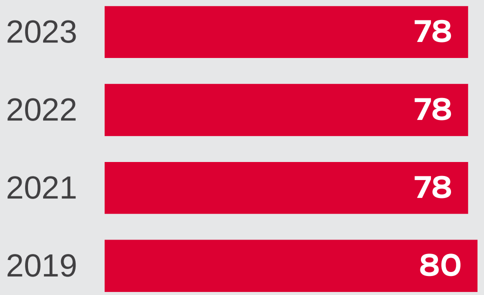


... found the return process easy/ effortless

Biggest evolutions vs. 2022

UK	+8	▲
Switzerland	-12	▼

% - Rating of last online purchase experience



... consider their last online purchase experience as excellent or very good

Biggest evolutions vs. 2022

Latvia	+7	▲
Bulgaria	-5	▼

▲▼ Significant increase/ decrease vs. previous year

GEOPOST

EFFORT LEVEL DURING ONLINE SHOPPING EXPERIENCE

Definition

This map illustrates the level of **effort made by the regulars when shopping online** within the European countries, giving a benchmark to each market to identify its own position in comparison to the EU average.

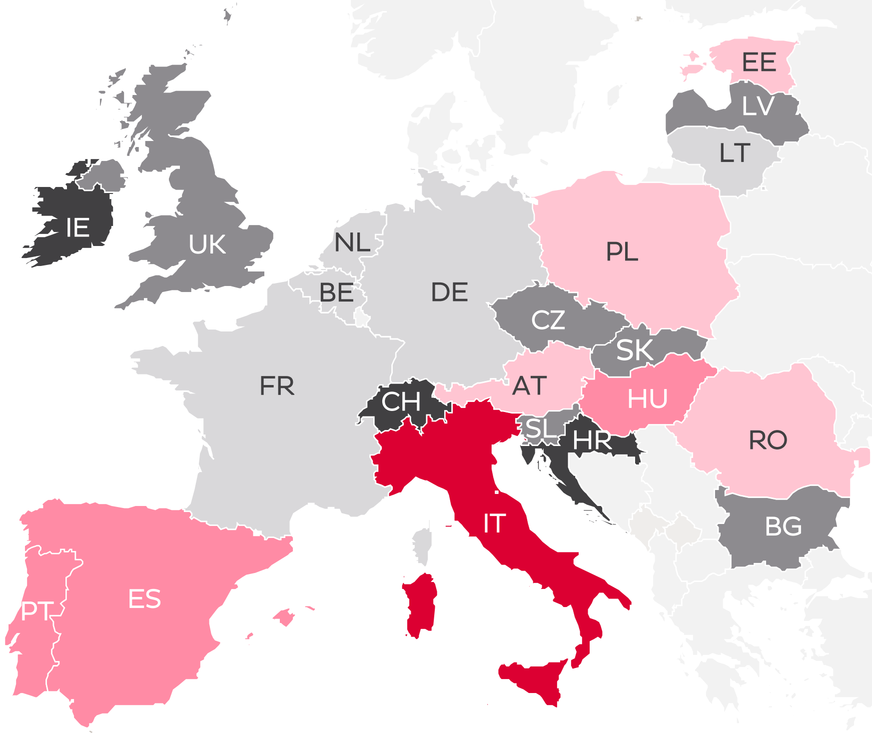
The effort level while shopping is defined by:

- Delivery effort: easy (country weighted)
- Return effort: easy (country weighted)
- Last online purchase: easy (country weighted)

Legend

Easy shopping experience vs. EUR Average

Difficult shopping experience vs. EUR Average



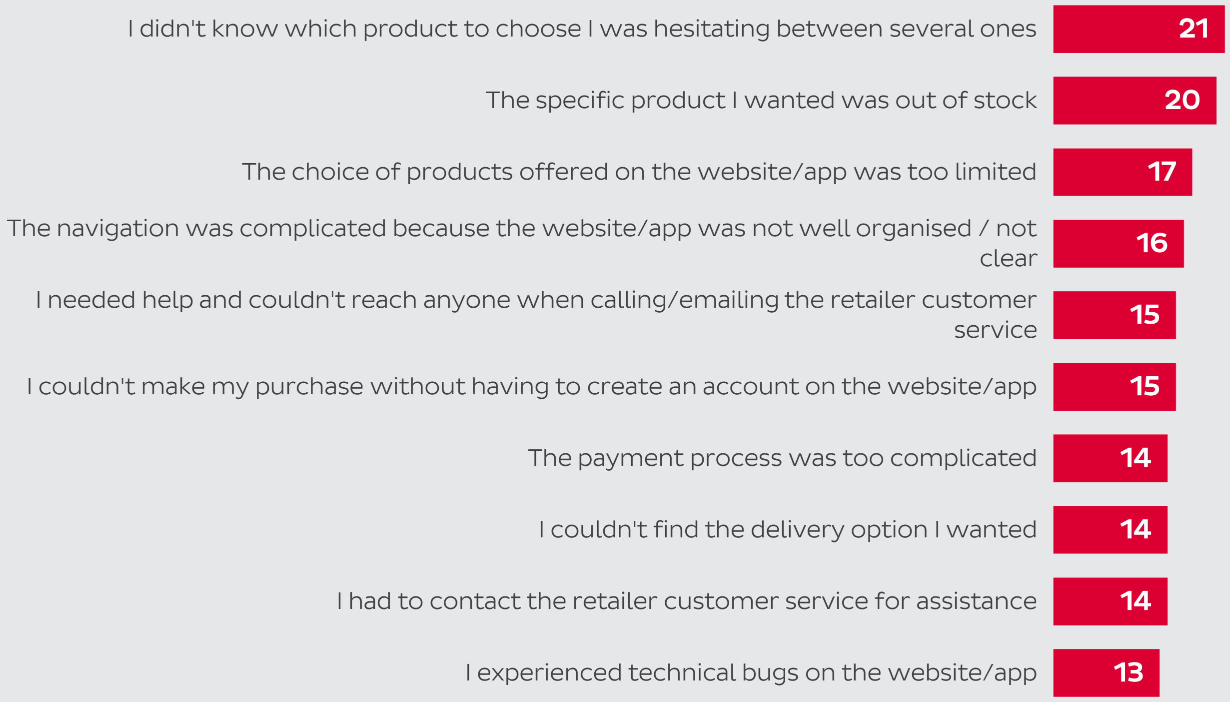
HIGH EFFORT INTO LAST PURCHASE ONLINE *New 2023*

AMONG BUYERS MAKING THE MOST EFFORT

The main reasons why European e-shoppers find their last online purchase not easy are because they were not sure about which product to buy or the product they wanted was out of stock.

TOP10 – Reasons of high effort into the last purchase online

Based on buyers making the most effort for their last online purchase (n=1225)



D13.a You said that you had to put high or extremely high effort into making your last online purchase. For what reasons?

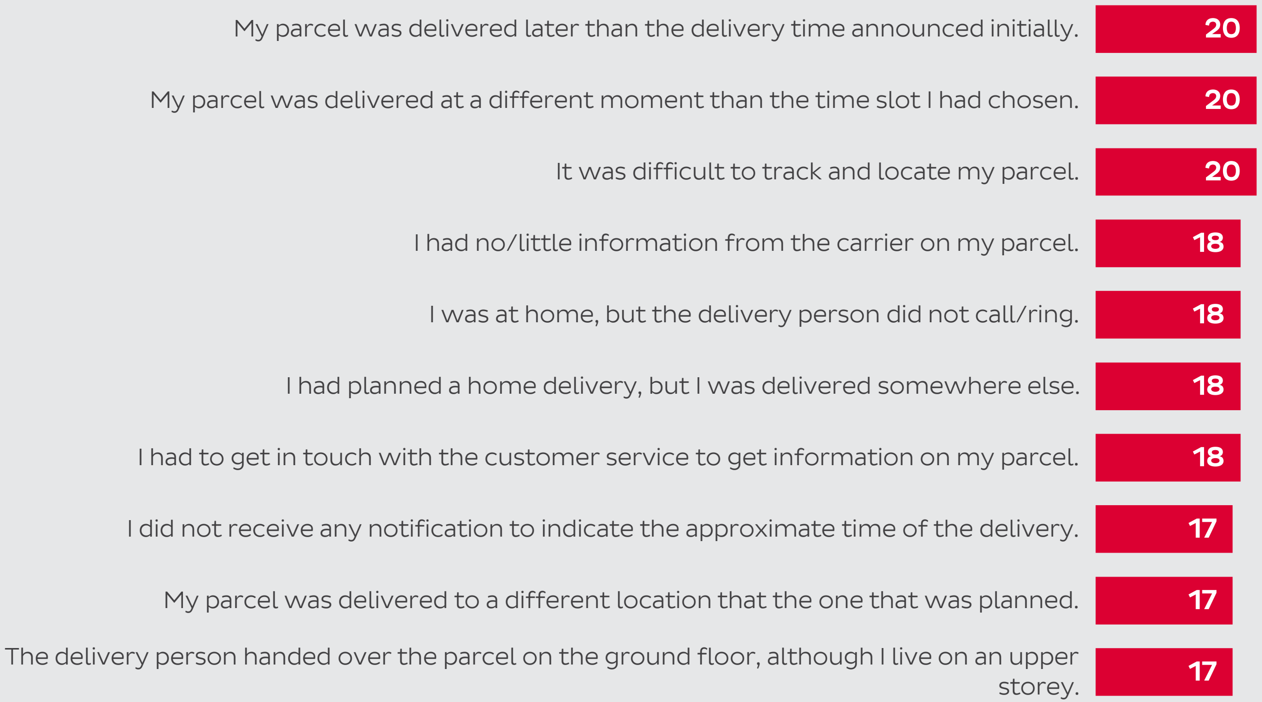
REGULAR E-SHOPPERS

HIGH EFFORT INTO DELIVERY

AMONG BUYERS MAKING THE MOST EFFORT

In terms of delivery issues faced by regular e-shoppers, the most commons are related to delay in the delivery, delivery done at a wrong moment or lack of tracking information.

TOP10 – Reasons of high effort into the delivery Based on buyers making the most effort for delivery (n=1109)



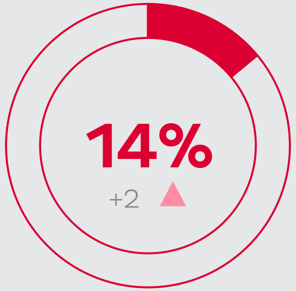
My parcel was delivered later than the delivery time announced initially.	20
My parcel was delivered at a different moment than the time slot I had chosen.	20
It was difficult to track and locate my parcel.	20
I had no/little information from the carrier on my parcel.	18
I was at home, but the delivery person did not call/ring.	18
I had planned a home delivery, but I was delivered somewhere else.	18
I had to get in touch with the customer service to get information on my parcel.	18
I did not receive any notification to indicate the approximate time of the delivery.	17
My parcel was delivered to a different location that the one that was planned.	17
The delivery person handed over the parcel on the ground floor, although I live on an upper storey.	17

D14.a You said that you had to put high or extremely high effort into the delivery of your last online purchase. For what reasons?

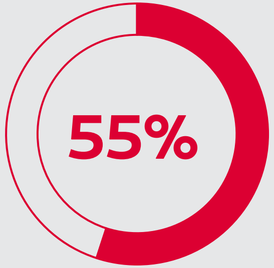
REGULAR E-SHOPPERS

RETURNS

Same share of returns in 2023 than in the past, and most regular e-shoppers in Europe find the return as easy. They mainly drop it off at a post office, but more of them than in the past drop it at a parcel shop.



… returned their last purchase



… Found it easy/effortless (n=5847)

Top 3 Return Methods n=5847

40% Dropping it off at a post office/ post station

34% Dropping it off at a parcel shop +3 ▲

23% Picking it at home -3 ▼ -5 ▼

Biggest evolutions vs. 2022 (apart from TOP3)
20% Dropping it off at a parcel locker station +2 ▲

D12. Did you return the item you bought?
C21. Usually, how do you return the parcel?
C22. In general, how much effort did you have to invest into returning the item(s)?
C23. Usually, when do you look at the retailer's return policy/options?

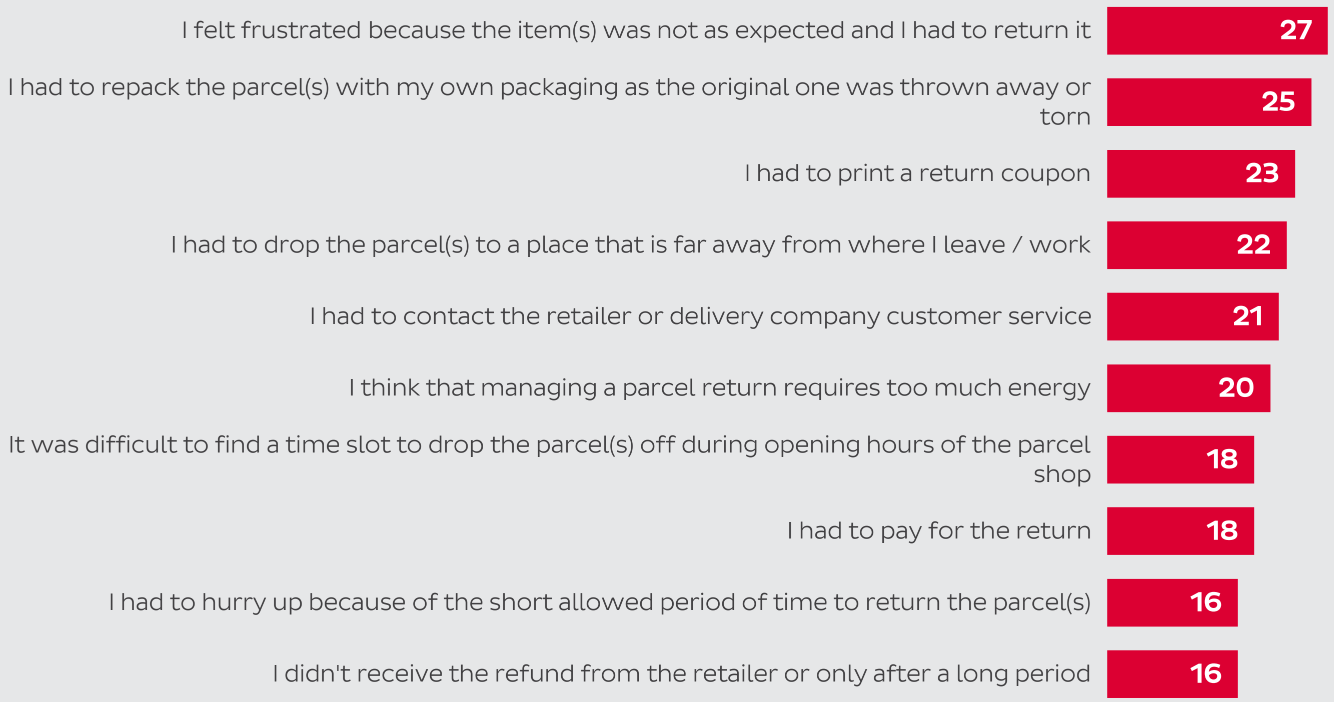
HIGH EFFORT INTO RETURN *New 2023*

AMONG BUYERS MAKING THE MOST EFFORT

Many reasons why regulars find the return not easy: first the frustration as the product bought is not the one expected, and also as they had to repack the parcel, to print a return coupon and to drop it off to a place not close to their home.

TOP10 – Reasons of high effort into the return

Based on buyers making the most effort for return (n=969)



C22.Bis And why did you have to invest a high effort to return the item(s) ?

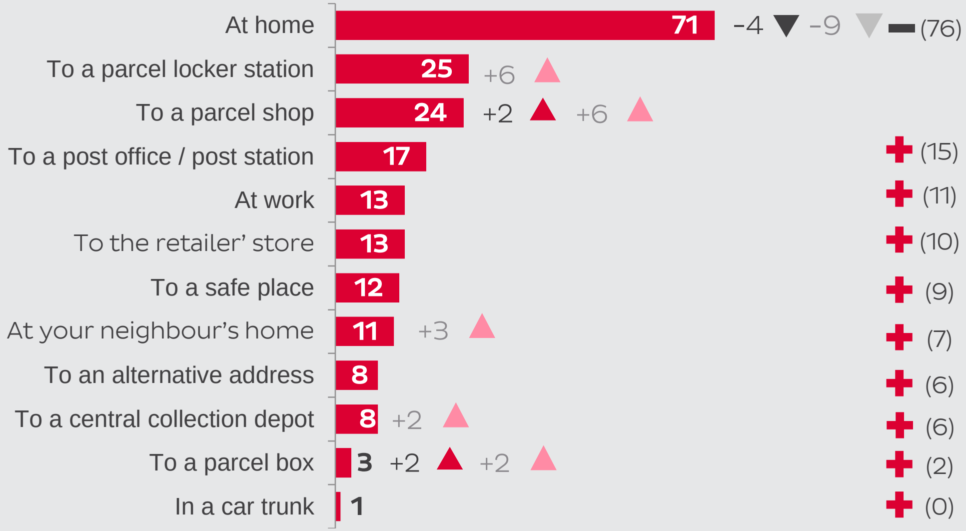
ZOOM ON THE AFICIONADOS

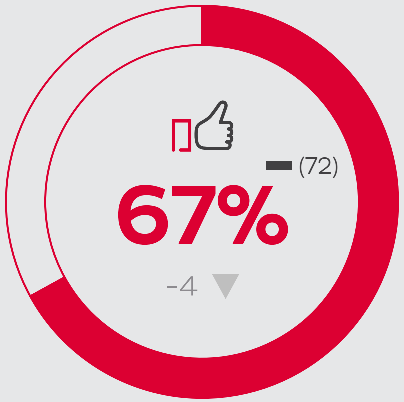
Aficionados are more to use out of home deliveries than regular e-shoppers and they increased their use of parcel shops.

DELIVERY PREFERENCES

At home delivery remains the # 1 delivery preference of Aficionados, despite the decrease in 2023. Compared to regulars, they are more to use almost all OOH delivery places and more than in the past they get their delivery in parcel shop.

Usual delivery places-%





... found delivery easy/effortless

2.1 +0.2 △ ✚ (1,9)

Delivery places on average

56% +9 △ ✚ (51)

Usually use more than one delivery place

46% +9 △

Are delivered out of home (parcel locker, parcel shop or retailer store)

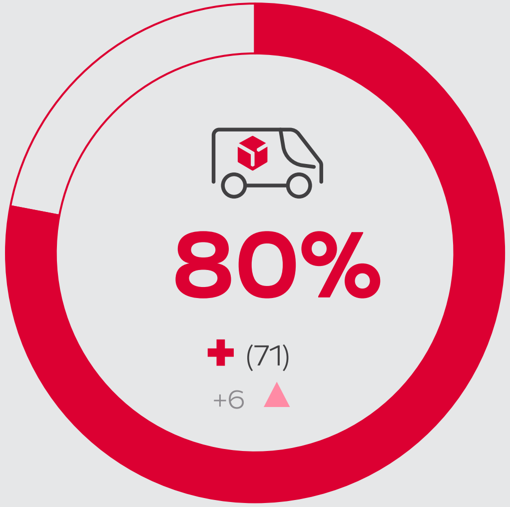
D14. How much effort did you have to put into the delivery (e.g. tracking, picking up, receiving, etc...) of your last online purchase?
C14. Where do you usually have your parcels delivered to?

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

ZOOM ON THE AFICIONADOS

DELIVERY COMPANY

Even more Aficionados grant importance to the name of the delivery company, seeking for reassurance and a good service, more than the average.



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

Reasons of importance to know the delivery company % (n=2913)

D15. In your opinion, is it important to know who the delivery company will be, before finalizing the purchase?
D16. You said that for you it is important to know who the delivery company will be, before finalizing your purchase. Which of the following reasons apply to you? Base :think that it is important to know the delivery company before finalizing the purchase
Rq: several answers allowed

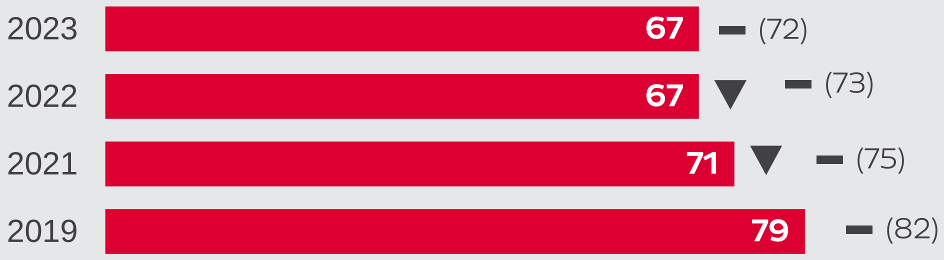
+ – vs. regular e-shoppers (xx) at 95% confidence rate

ZOOM ON THE AFICIONADOS

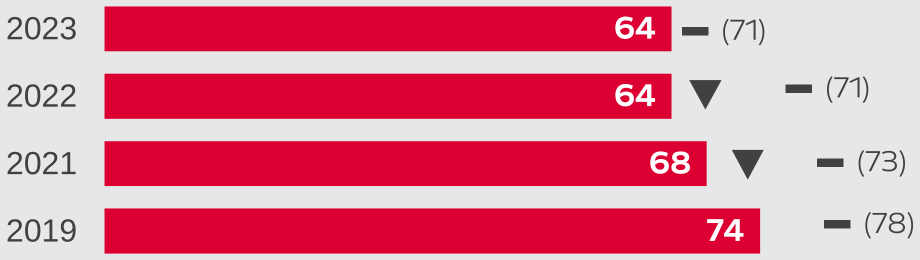
EFFORT AND SATISFACTION VS. ONLINE PURCHASE

Stable evaluation of the delivery and purchase effort by Aficionados, yet, their perception is lower than the one of regular e-shoppers and has not grown back after the decrease observed in 2022.

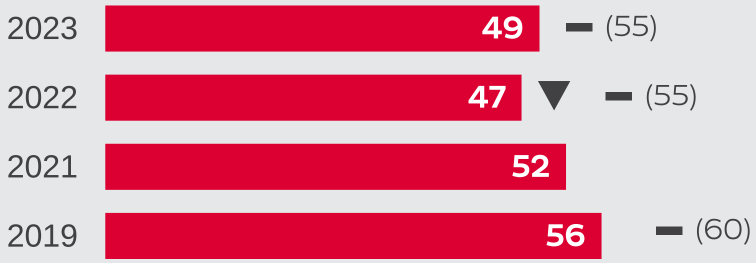
% – Delivery effort found the delivery easy / effortless



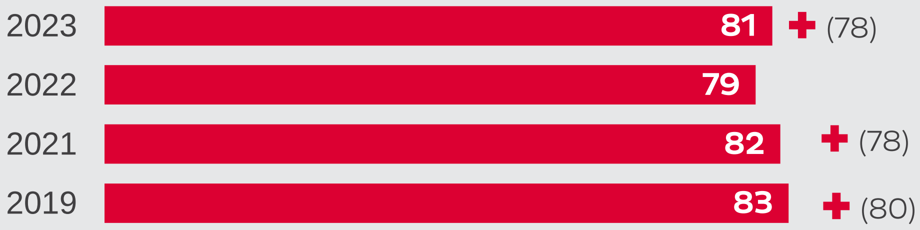
% – Last online purchase effort consider their last online purchase as easy



% – Return effort found the return process easy / effortless



% – Rating of last online purchase experience consider their last online purchase experience as excellent or very good



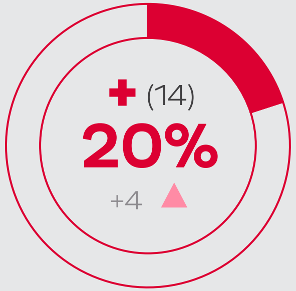
✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

▲▼ Significant increase/ decrease vs. previous year

ZOOM ON THE AFICIONADOS

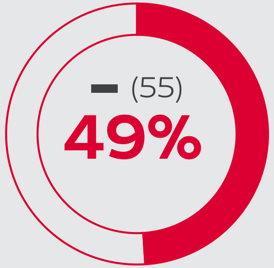
RETURNS

2 in 10 Aficionados returned their last purchase, and they find this process less easy than the regular e-shoppers.



✚ (14)
20%
+4 ▲

... returned their last purchase



▬ (55)
49%

... Found it easy/effortless (n=2182)

Top 3 Return Methods n=2182

39%	Dropping it off at a post office/ post station
32%	Dropping it off at a parcel shop
27%	Picking it at home ✚ (23) -5 ▼

Biggest evolutions vs. 2022 (apart from TOP3))
NO OTHER EVOLUTION

D12. Did you return the item you bought?
C21. Usually, how do you return the parcel?
C22. In general, how much effort did you have to invest into returning the item(s)?

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

ZOOM ON THE AFICIONADOS

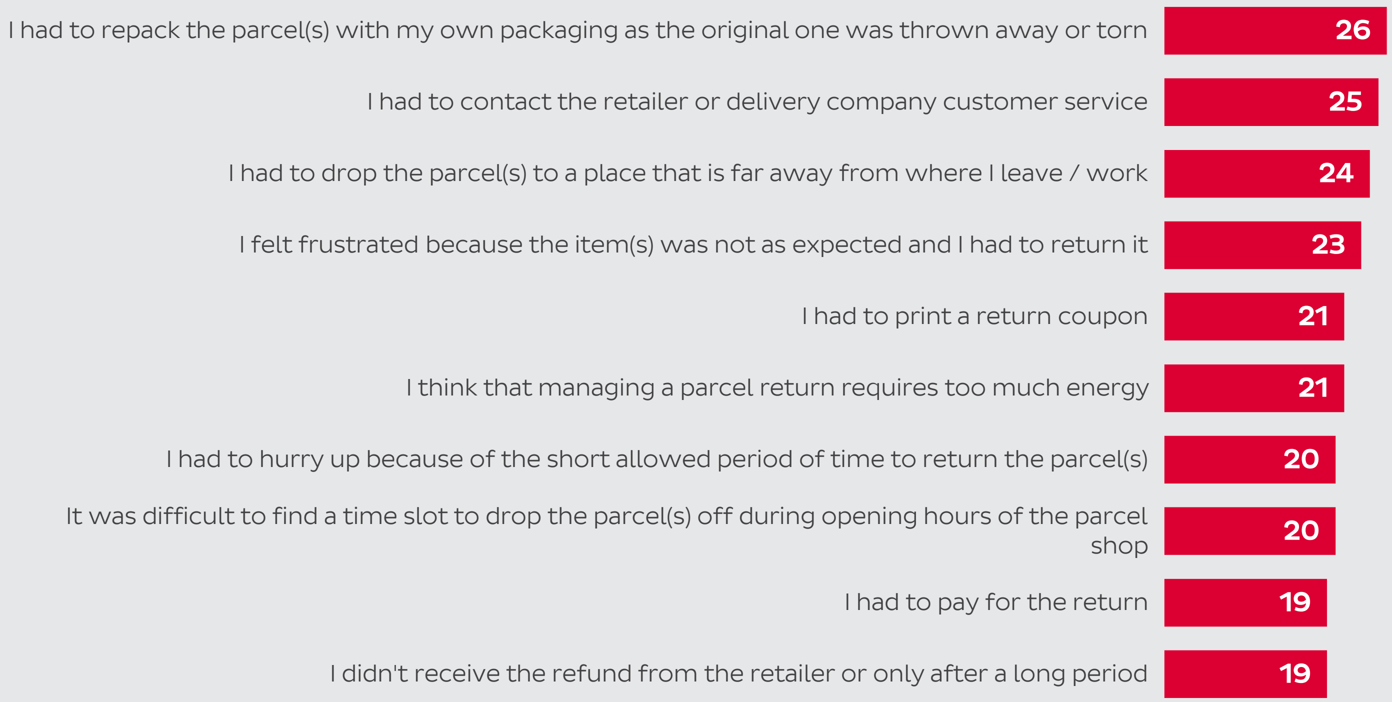
HIGH EFFORT INTO RETURN *New 2023*

AMONG BUYERS MAKING THE MOST EFFORT

Many reasons why Aficionados find the return not easy: first they had to repack the parcel, they had to contact the customer service, and also, they had to drop the parcel to a place far away.

TOP10 – Reasons of high effort into the return

Based on buyers making the most effort for return (n=490)



C22.Bis And why did you have to invest a high effort to return the item(s) ?

+ − vs. regular e-shoppers (xx) at 95% confidence rate

ZOOM ON THE AFICIONADOS

REVIEWS AND RECOMMENDATIONS

Trust in website remains the main driver to choose the website, followed by the heavy e-buyers' relative recommendation and word of mouth. Most of them share feedback after their purchase.

Drivers when choosing a website/ an app-%

2.3 ✚ (2.0)

Average number of influencers

77% ✚ (67)

Share or publish a feedback after purchasing

62% -3 ▼ ✚ (55)

NET Social Media and influencers

C18 – When shopping online, how do you choose a website and/or an app?
C19 - Do you publish or give feedback, after purchasing?
Rq: Several answers allowed

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate