European e-shoppers in 2021

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33 countries worldwide, including 21 European countries

Methodology

Our 2021 e-shopper barometer study was conducted from 2 June to 16 July 2021. The data were gathered through blind (blind: interviewees had no reference to a brand, e-tailer or transporter), online interviews with 40,000 interviews worldwide including 23,394 participants across European countries (Austria, Belgium, Croatia, Czech Republic, Estonia, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Switzerland, UK).

Outside of Europe, 12 additional countries were also studied: Brazil, China, India, Indonesia, Malaysia, the Philippines, Russia, Singapore, South Africa, Thailand, Turkey and Vietnam. China, in particular, is featured throughout the report for the importance of its role in e-commerce.

Between 800 and 1,556 participants were interviewed per country. All participants, aged 18 or over, had ordered physical goods online since January 2021 and then received at least one parcel, identified within a sample representative of the national population in age, gender and social economic class. For the consolidated results at the European level, a weight was applied to each country in order to reflect the correct proportion of e-shoppers between the European countries.

The full report is available online at dpdgroup.com.

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In 2020 e-commerce shifted to new heights. This momentum has also continued through 2021.

“We are in a season of unprecedented disruption, largely due to the ongoing reverberations of the COVID-19 pandemic but also by Brexit, supply chain challenges and VAT changes. Against this tumultuous backdrop, e-commerce has ceased to be a novelty and has cemented its place among the buying habits of today’s consumers. Indeed, the maturity of e-shoppers is one of the key highlights of 2021; bolstered by the pandemic, e-commerce has never been more robust, more vibrant or more broadly embraced.

Beyond e-shopping, the entire relationship between consumers and vendors is undergoing a monumental shift. Driven by a sense of newfound freedom from technological, logistic and economic restrictions, consumers buy whenever, wherever and however they please, be it in person or online. This fusion of traditional and e-commerce has given rise to the phenomenon we have dubbed ‘New Commerce’, the logical next step after omnichannel, with a transformative potential that should encourage the entire industry.

Our recent ethnological study *HelloDPD!* offers an in-depth analysis of the consumer habits and attitudes comprising New Commerce, with a focus on the sometimes complementary, sometimes contradictory behaviours that can be divided into two categories: Always More and Even Less.

Endowed with this recently acquired flexibility in which online shopping has become second nature, consumers are less reliant on social media for reviews and recommendations prior to purchase. The convenience and money-saving benefits of online shopping are slightly less important than in years past, owing primarily to the fact that consumers now view e-commerce as an everyday purchasing channel as opposed to a place for occasional bargain-hunting. Overall, e-commerce has never been more widely and fully embraced; it is our duty to provide consumers of all profiles and all buying habits with the shopping experience they want and expect.”

Jean-Claude Sonet,
Executive Vice President in charge of Marketing, Communications & Sustainability

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A shifting landscape

The past few years have witnessed wave upon wave of disruptions whose magnitude has affected the entire world. COVID-19 was clearly the most dramatic, but there have been many others, from Brexit to supply chain shortages to VAT changes and more. As delivery experts, we have been on the front lines of all these happenings and have therefore been exceptionally well placed to both observe and analyse their implications for the present and future of e-commerce.

As last year's European e-shopper 2020 report revealed, the COVID-19 pandemic had a powerful accelerating effect on e-commerce as a whole, adding around 15 million new shoppers and fast-forwarding the industry three to five years ahead of pre-pandemic forecasts. Along with new shoppers, new behaviours appeared in response to the government-imposed restrictions and lockdowns, which left consumers little choice other than the internet to meet their everyday needs. The crisis was thus a contributing factor to the growth of most online product categories, especially food. As the pandemic ebbs, some of these new habits and behaviours have subsided as well, while others subsist and evolve, becoming lasting trends that continue to shape the industry.

The combined effects of Brexit and VAT changes have led to lower cross-border purchasing, especially in the UK, and among those who do purchase from foreign websites, the percentage of those buying from Europe has increased, while the percentage of those buying from China decreased due to the pandemic. In terms of types of goods purchased online, the leading categories such as leisure, medicine and especially fresh food and beverages have experienced tremendous growth and development. This is due in particular to the effect of the pandemic, as consumers responded to social distancing and store accessibility issues by purchasing record-setting volumes of groceries and ready-to-eat meals online.

15.5%
of regular e-shoppers' purchases in Europe are made online.

Setting aside the explosive effects of the pandemic, the e-commerce channel has been steadily growing year after year to the point where purchasing online has become second nature to many. In 2021 15.5% of all purchases among regular shoppers in Europe were made online. As the world becomes more digitalised, consumerism is less and less hindered by technical, logistic and economic restrictions. The pandemic served as a catalyst for this transition, facilitating the emergence of a multi-faceted, omnichannel consumerism that we have dubbed New Commerce, in which digital and traditional modes of shopping meet, as illustrated in *HelloDPD!*. Looking ahead, this New Commerce will set the tone for the future not just of e-commerce, but of commerce itself.

90 online purchases per year on average for Chinese e-shoppers vs **43** for European regular e-shoppers.

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Regular e-shoppers

Representing the backbone of the e-commerce industry, regular e-shoppers are defined as shoppers aged 18 to 70 who buy at least one product category online per month. They now represent 48% of all European e-shoppers and account for 86% of online market share volume in Europe. The pandemic not only increased the number of regular e-shoppers, which has grown 4 points since 2019 but incited them to buy even more online than they did prior to the crisis. The average regular e-shopper received almost six parcels over the past month. Many categories benefitted from this increase in buying, especially home equipment and food.

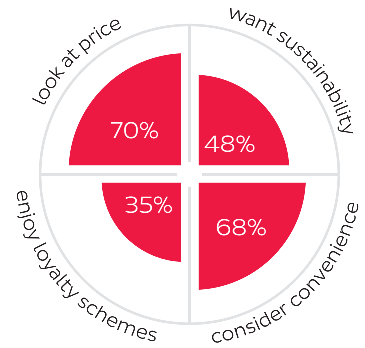
Technologically savvy and frequently – if not constantly – online, 65% of regular e-shoppers rely on their smartphones to e-shop. But despite this strong online presence, regular e-shoppers rely less on social media and influencers when choosing their websites than they did in years past. This independence is likely due to their growing maturity. Loyalty schemes, however, continue to hold special appeal for this group, 35% of whom are subscribed to an online retailer's loyalty program.

48% of all e-shoppers are regular and account for 86% of all online purchases.

"*Regular e-shoppers are somewhat less satisfied with the ease of the online shopping experience in general, and that includes delivery. However, this feedback can be explained both by e-shoppers' higher expectations in light of their increasing maturity and by the complexity of managing the sudden rise in volumes resulting from the pandemic.*"

Hervé Crochet,
E-Commerce Director

Regular e-shoppers made **5.5** purchases last month and



Within the context of New Commerce, many regular e-shoppers display behaviours that place them between the Always More and the Even Less categories. Always More shoppers embrace a particularly unrestrained consumerism in which e-commerce plays an essential role, be it scouring the internet for deals, practicing phygital ubiquity, which mixes brick-and-mortar and online shopping, bypassing human interaction in favour of digitised processes or using e-commerce as a form of "retail-tainment." Always More shoppers are continually searching for ways to indulge their seemingly insatiable appetite for consumption. Conversely, Even Less shoppers reject what they consider to be excessive consumerism, opting instead for a slower, more frugal approach characterised by local and collective purchasing, re-humanised interaction and quality over quantity.

95% of all netizens in China bought online in the first half of 2021 vs **78%** in Europe.

Spotlight 1
Food

Long a niche category in e-commerce, food was the clear winner of the explosive growth of online shopping driven by the pandemic. Faced with the constraints of lockdown, consumers ate far more often at home, resulting in soaring purchase volumes for grocery stores worldwide, while fresh food and beverage became the category with the highest growth between 2019 and 2021. A full 35% of regular e-shoppers have ordered fresh food and beverages online since January, with the vast majority choosing home as their usual delivery place.

Especially popular among more experienced and heavier e-shoppers, the buying of fresh food and beverages is perceived as a convenient, less time-consuming, less stressful alternative to in-store buying. It also offers the benefit of nearly uninterrupted accessibility and dispenses with carrying grocery bags. As a result, regular e-buyers shop overall online an impressive 71 times per year, purchasing from all categories. However, unlike long-term e-commerce categories such as clothes and books, food is a relative newcomer that faces specific e-shopping expectations as well as inherent needs.

Food has increased significantly, and barriers to buying concern quality or freshness, because the products can't be seen.

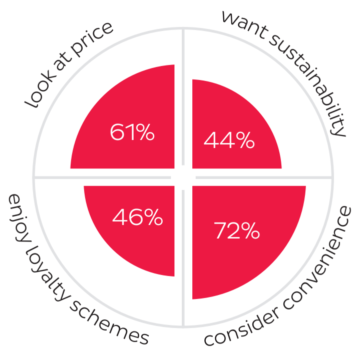
For those reticent to shop for fresh food and beverages online, the chief barrier is doubt about product freshness and quality, closely followed by the inability to see and personally choose products. Variety of choice and cost of delivery are also significant barriers, as are safety risks relating to cold chain interruption. Even among regular fresh food and beverage buyers, delivery is the object of high expectations; services like real time delivery information and the ability to choose a one-hour delivery window in advance are very important, and 68% of shoppers also consider it important to know the delivery company.

Food is the second most often purchased category online in China.

E-shopper profiles in 2021

(part 1)

Aficionado e-shoppers made **10** purchases last month and



The aficionado e-shopper

With a growth of 2 points among all European e-shopper profiles, aficionados are the most experienced and fervent buyers, relying heavily on e-commerce to satisfy their needs. They especially appreciate the convenience and lack of stress that characterises the entire e-shopping experience from start to finish, with 82% finding delivery to be effortless or easy and 65% feeling they can find nearly all of the products and services they need online. Smartphone in hand, these tech-savvy bargain hunters love a good deal but do not hesitate to seek out reviews and recommendations before making a purchase. Highly loyal to their favourite websites, 46% adhere to at least one loyalty scheme. Under the influence of the pandemic, aficionados bought even more online than in previous years and were 55% (+12 points) to have ordered fresh food and beverages since the start of 2021.

More than a convenience, e-shopping for aficionados is a passion that distances them from traditional retailers. Many of them exhibit an Always More behaviour characterised by FOMO (Fear Of Missing Out), described in detail in *HelloDPD!* in which shoppers are so eager to be the first to find deals and bargains and so fearful of missing a promotion on a coveted item that they are constantly online, frequently checking their phones for notifications at all hours of the day or night. It is little wonder that the volume of their purchases exceeds that of all other e-shopper profiles: the average aficionado received 10 parcels in the last month, with German online shoppers setting the maximum of 13.

Aficionados received **10** parcels over the last month.

The senior e-shopper

Last year's e-shopper barometer report explored the sudden growth of the "senior e-shopper" profile in response to the health crisis. Aged 55 and older, this group generally uses e-commerce more out of necessity than desire and tends to show many of the behaviours associated with novice e-shoppers, such as placing high importance on trust when choosing websites and having a relatively relaxed approach to delivery.

Senior e-shoppers still prefer desktop/laptop buying over mobile devices and are overall less likely to use social media than younger digital shoppers. They are also more prudent than their younger peers when shopping and paying (e.g., using price comparison tools, reading product descriptions, preferring credit cards to digital wallets, etc.). Today, senior e-shoppers make 1 of every 10 purchases online and are more likely than any other e-shopper profile to choose home as their usual delivery place.

1 purchase out of **10** made by European seniors is online.

18.6% of Chinese seniors' purchases are made online.

Spotlight 2

Sustainability

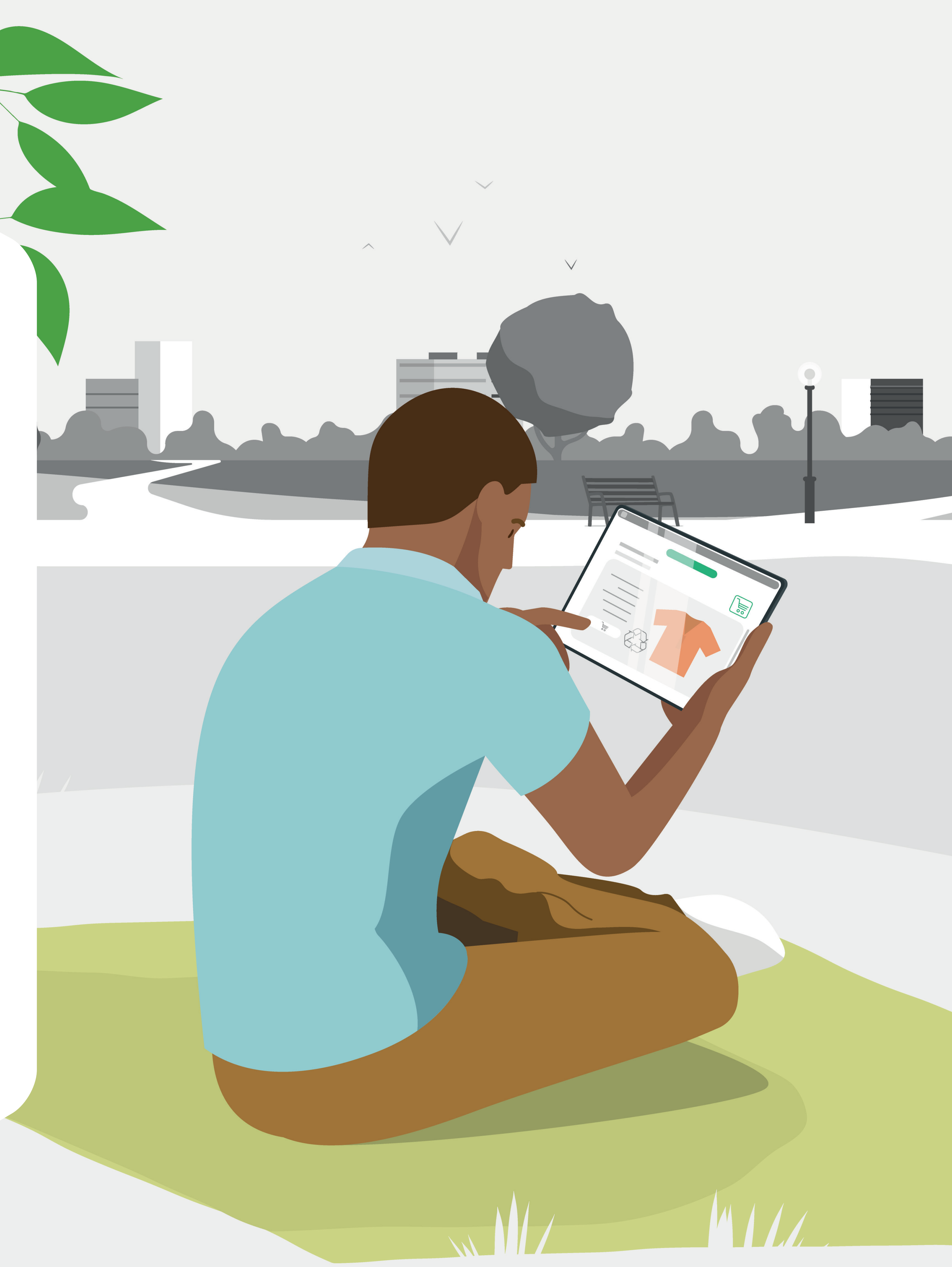
Among the most notable repercussions of the pandemic is a well-documented increase in environmental and social awareness, which has added momentum to the growth of conscientious e-consumerism. More than ever, consumers are thinking about the impact of their purchases on their local communities and their social and ecological responsibility. Interestingly enough for an impressive 47% of regular e-shoppers, a sustainable online purchase means buying an eco-friendly product or a product from a more sustainable brand.

Nevertheless, this greater eco-awareness does not necessarily translate into action. By and large, e-shoppers feel that sustainability is the responsibility of brands and companies, and many are willing to temporarily set aside their convictions in the face of an especially attractive offer. Thus, while 69% of regular e-shoppers expect brands and manufacturers to be more sustainable, less than half make sure to buy sustainable products when possible, and only 41% are willing to pay a premium for sustainable products or services.

For now, definitions regarding the place of purchase and the delivery process are less associated with the overall concept of sustainable shopping than are products and brands. The notion of green delivery tends to involve low-emission vehicles (54%) or the fact of combining multiple orders into a single delivery (48%). Be that as it may, green delivery remains a relevant differentiating factor, since 65% of regular e-shoppers are willing to go to a different website to find a more sustainable delivery option.

65% of regular e-shoppers are willing to go to a different site to find a more sustainable delivery option.

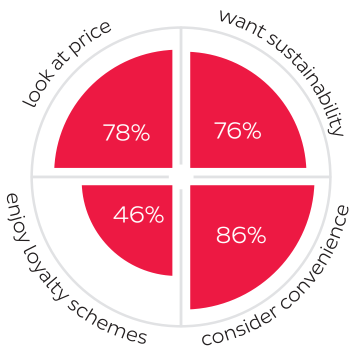
74% of all Chinese e-shoppers buy environmentally friendly products when possible.



E-shopper profiles in 2021

(part 2)

Epicurean e-shoppers made
3.6 purchases last month and



The epicurean e-shopper

Accounting for 13% of all European e-shoppers, epicureans distinguish themselves from other profiles not in the quantity nor the type of purchases they make, but rather in the ease, simplicity and personal enjoyment they seek from the e-shopping experience. Perpetually on the go, epicureans consider themselves much busier than in the past and are therefore looking for more ways to facilitate their daily lives – even if it means paying more. Service quality in general is highly important to epicureans, which is why they prefer to buy well-known brands (78%) and why they consider it particularly important to know the delivery company (81%).

Often conscientious in their purchasing habits, epicureans make decisions that reflect their personal convictions in terms of health and the environment. This buying behaviour belongs to the Even Less category of New Commerce, which is far more socially and ethically conscious than its Always More counterpart. Thus, 82% of epicureans actively look for products and services that help them have a healthy lifestyle, while 76% make sure to buy more sustainable products when possible. Likewise, in comparison with total e-shoppers, epicureans are more willing to go to another site if it offers more sustainable delivery options (79% vs 65%).

95% of all Chinese e-shoppers shared or published feedback after purchase.

The eco-selective e-shopper

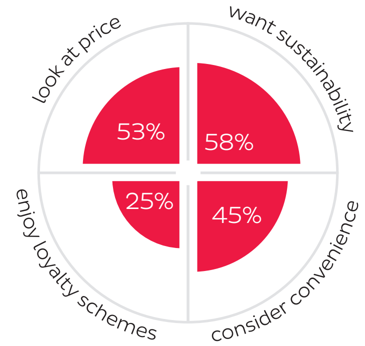
Representing 14% of all European e-shoppers, eco-selective buyers are relatively occasional yet shrewd e-shoppers. They purchase from a select few categories online and show a special concern for the social and environmental repercussions of their choices, turning to e-commerce only as a means of finding the occasional good deal - even if it means buying from e-tailers as far away as China.

As in 2019, eco-selective e-shoppers in 2021 continue to hunt for bargains online. In fact, they are the only shoppers whose purchases from China have not decreased (77% of this group has engaged in cross-border buying online, with 59% choosing Chinese websites, with no change versus 2019).

Like epicureans, eco-selective e-shoppers show a certain contradiction between their beliefs and their behaviours, as they expect companies and brands to be responsible yet personally buy fewer green products than in the past and are even less willing to pay more for a green product than they were in 2019. However, a 5-point decrease in the overall number of eco-selective e-shoppers since 2019 is perhaps proof that reconciling these contradictory habits is increasingly difficult.

81% consider it important to know the delivery company (needing to be reassured).

Eco-selective e-shoppers made
3.3 purchases last month and



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The rise of price-conscious buyers

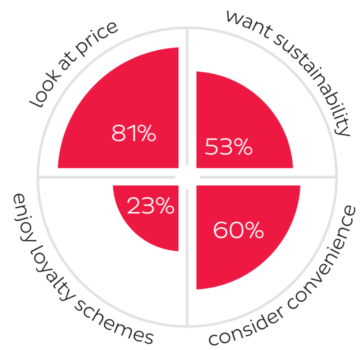
The most recent e-shopper profile to emerge, price-conscious buyers represent 10% of all European e-shoppers. Interestingly, these consumers are significantly more experienced with e-commerce than other shoppers, having begun over 10 years ago for the most part. Far from showing the frenzied purchasing behaviour of aficionados, price-conscious buyers are frugal, responsible shoppers who choose to buy online only when the price is right. This places them somewhat at odds with regular e-shoppers who are globally less motivated by price post-pandemic than they were pre-pandemic.

This preference for convenience, in which e-commerce is only chosen over traditional commerce if it can better meet their needs, is also manifest in the way that price-conscious buyers approach delivery. While this group often chooses home delivery, they also do not hesitate to choose lockers as a flexible, affordable pick-up solution, thereby ensuring that delivery conforms to their personal schedule and preferences – not the other way around.

73% of Chinese e-shoppers think shopping online saves money.

Price-conscious buyers prefer lockers for delivery as it's a less costly delivery option.

Price-conscious e-shoppers made **3.8** purchases last month and



Spotlight 3

Out-of-home delivery

Delivery in the post-COVID era remains globally satisfactory, and 75% of regular e-shoppers claim their last delivery was easy. Overall, e-shoppers are using fewer types of delivery places on average, most likely as a result of pandemic-related mobility restrictions. And while the ranking of main delivery places resembles that of 2019, both parcel shops and especially parcel locker stations progressed, with the latter moving up to 3rd place, just one percentage point behind parcel shops.

Delivery preferences also remain similar to 2019 such as real-time information, multiple delivery options and select delivery day and one-hour window ahead of delivery. Knowing the exact one-hour window and advanced notifications both moved up in the ranking, undoubtedly reflecting the desire of those working from home to avoid interruption during important or high-activity moments in their workday. The European countries where parcel locker usage has grown and ranks high are Estonia where regular e-shoppers routinely use parcel shops (87%) followed by Latvia (75%), Lithuania (70%), Poland (62%), Hungary (24%) and finally Romania (21%).

39% of Chinese e-shoppers prefer to be delivered at a parcel locker and 38% at a parcel shop.

Key take-aways

"These key take-aways provide a clear message for the e-commerce industry. Today's e-shoppers are confident in the online shopping experience and now expect a high level of service with every purchase. They are perfectly at ease buying food online and intend to keep doing so. They care about the environment, and, as ever, convenience is a key motivator. With these expectations in mind, it is the industry's duty to meet them."

Carmen Cureu,
Market Research Director

1. No longer a mere channel, e-shopping has become a part of everyday life with a key role to play in New Commerce. This is evident in the heights that e-commerce reached during the pandemic.

2. As e-shopping has become a normal habit, consumers' expectations are increasing. E-shoppers are still very satisfied with the whole e-shopping experience (purchase, delivery, return) but slightly less so than in previous years.

3. Sustainability has become a major expectation throughout the value chain, but e-shoppers associate a sustainable purchase mostly with the product itself. For them, green delivery means using low-emission vehicles and the possibility of combining several orders.

4. Fresh food & beverages are the clear winners of product category sales, especially fresh and ready-to-eat food. Around 35% of regular e-shoppers ordered food products online since January.

5. Parcel lockers have gained popularity and are now as frequently used as parcel shops, reflecting e-shoppers' expectation of predictability for delivery companies.

Conclusion

From aficionados and epicureans to price-conscious and eco-selective e-shoppers, from senior e-shoppers to new e-shoppers, from Always More to Even Less, the e-commerce landscape has never been so diverse. The world of New Commerce offers consumers unprecedented liberty to find, purchase and receive nearly any good, any place, at any time. In such a context, what can e-merchants do to ensure that they are keeping pace with the constantly evolving needs of today's shoppers?

They must strive, perhaps more than ever before, to meet shoppers where they are. As consumers have fully adopted the e-commerce experience, their expectations have steadily grown. E-merchants need to offer a 360° approach, encompassing online and offline channels and taking into account all ages and levels of e-shopping expertise.

This could mean scheduling advertisements to reach aficionados shopping for deals at midnight, offering delivery to lockers near schools where busy epicureans are likely to pass or providing information on the carbon footprint of various delivery options to help eco-selective shoppers make an informed decision that reflects their values.

The rise of New Commerce thus constitutes an unprecedented opportunity to grow and evolve alongside all consumers towards an ever more agile, ever more robust and thriving marketplace.

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