

Delivering change



2023 E-shopper
barometer edition



Latest
e-commerce
trends



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back to basics
— 08



Society:
new generations,
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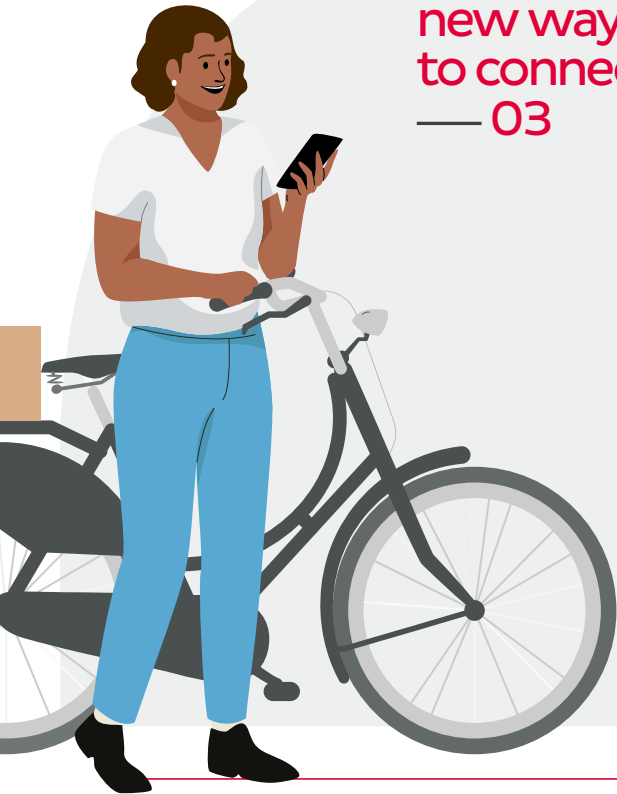
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Deep dive:
new ways
to connect

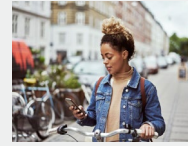
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Thank you for your contribution!



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Meeting e-shoppers where they are



Jean-Claude Sonet,
EVP in charge
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What are the highlights of this year's e-Shopper Barometer?

E-shoppers demonstrate once again that online purchasing is now firmly ingrained in their consumption habits and that, even in the face of geopolitical instability and economic challenges, they have no desire to change.

How does the economic context influence e-shoppers' behavior?

Across Europe, e-shoppers show that when their budgets tighten, the Internet offers a convenient and cost-effective means of acquiring the goods and services they seek. One of the key results of this heightened price awareness is the soaring popularity of C2C platforms, which appeal powerfully to e-shoppers through their unique ability to combine several of their top priorities, namely savings, convenience, and sustainability. Likewise, shopping through social media has become an increasingly popular practice, whether for inspiration, product information, or purchasing.

How has parcel delivery been impacted by these changes?

Out-of-home solutions such as lockers continue their upward trend, as e-shoppers looked beyond the home for convenient, flexible, and cost-effective delivery solutions capable of keeping up with their active lifestyles. When it comes to delivery, ongoing innovation plays a key role in improving the overall e-shopper experience.

What can we expect to see in the e-commerce industry in the coming years?

As we look to the future, there is every sign that e-commerce will maintain its positive momentum. It has proven itself to be highly resilient and widely embraced, with plenty of room for additional growth in Europe. The second-hand market is certain to be a source of ongoing growth and a focus of innovation in the years to come. And as online channels further develop and diversify, I am confident that there will be many exciting possibilities ahead. ●



“E-shoppers demonstrate once again that online purchasing is now firmly ingrained in their consumption habits.”



Frugality is the new hype

— E-shoppers have adapted their habits in the face of economic constraints.

E-commerce demonstrates its resilience

Against a backdrop of geopolitical unrest and economic incertitude, e-commerce has proven its capacity to withstand sustained pressure. While the overall number of e-shoppers has declined slightly over the past two years, the proportion of regular e-shoppers, as well as the quantities and nearly all of the categories they buy, remain steady and the number of e-shoppers is still above 2019 levels. This clearly demonstrates that online shopping is a firmly established practice with convincing benefits.

Tighter budgets shape shopping behavior

Regular e-shoppers continue to show heightened sensitivity to price, which is to be expected considering the economic context. Regular e-shoppers focus on good deals and are somewhat less willing than in years past to pay a premium for sustainable products. These shoppers are also focusing more on detailed product descriptions, which indicates a desire to avoid returns.

76%

of all Europeans are e-shoppers.

48%

of all European e-shoppers are regular e-shoppers.

65%

of the regular e-shoppers consider that shopping online saves money.



C2C platforms continue to flourish

Growing numbers of regular e-shoppers are turning to second-hand platforms. The primary reason for this is financial; faced with economic pressure, consumers naturally wish to save money without sacrificing the pleasure of shopping. However, there are other contributing factors, such as ecological concerns and, for sellers, the desire to free up space at home or supplement their income.



Increasing popularity for OOH

Out-of-home (OOH) delivery solutions are increasingly popular. The proximity and flexibility of OOH align with consumers' on-the-go and at times stressful lifestyles. By choosing OOH, consignees gain the peace of mind that comes from knowing that their parcel is secure and that they can retrieve it at their own convenience without having to rely on a second party.

Predictability leads the way in delivery services

The perception of online purchase and delivery experiences is stabilizing. Predictability remains the leading delivery preference among e-shoppers, in particular real time delivery information. Having several delivery options and being able to select the day and time-window ahead of delivery are both increasingly popular.

55%

of e-shoppers feel they can find nearly 100% of the products and services they need online.



Deep dive: new ways to connect



— The e-shopper experience is changing. The omnipresence of social media combined with heightened economic pressure has led to the unprecedented popularity of C2C platforms, both for buying and selling. Similarly, social media platforms are increasingly used for shopping purposes, whether to find information or to buy directly.

Why consumers flock to C2C and social channels?



– More e-shoppers than ever are turning to C2C platforms and social media for shopping purposes, allowing them to save money, participate in the circular economy, find product information, and both share and receive feedback from fellow e-shoppers.



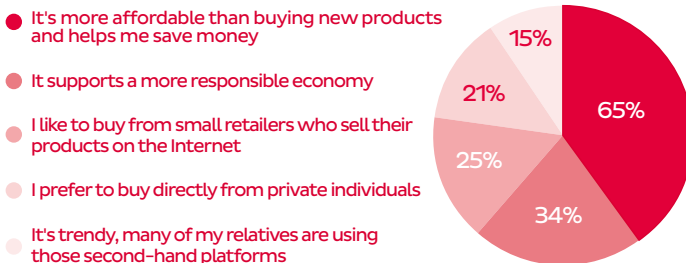
Nearly 3 in 4 European e-shoppers are using C2C platforms, with a third of regular e-shoppers claiming to buy more on these platforms than before.

Furthermore, those who buy do so often, with an annual average of more than 12 purchases. The benefits of C2C are clear and convincing: second-hand shopping allows consumers to acquire the products they seek at a lower price than buying new products. In addition to greater affordability, C2C shoppers appreciate the sense of responsible consumption that they gain from using this channel, as well as the way it enables them to support small retailers. In addition to the success of C2C, shopping through social media is also on the rise. Users rely on social networks to find inspiration and gather product information, to follow up on recommendations from friends or family, or to shop directly from content shared by brands or people/pages that they follow. ●

Reasons of selling



Reasons for purchasing



Glowing prospects for C2C



Jean-Gilles Henaut,
director of
Shop2Shop
at Chronopost

— What can we expect for the future of C2C?
Jean-Gilles Henaut, director of Shop2Shop at Chronopost, shares his perspective.

Why are more e-shoppers buying from C2C platforms?

Two key factors are at play, both of which reflect underlying market trends. First, economic necessity. Second, consumers' desire for greater sustainability. Since 2020 there has been a huge increase in C2C transactions; e-shoppers no longer have any qualms about buying second-hand.

What is Shop2Shop by Chronopost?

We saw that second-hand platforms had been growing steadily for several years and we recognized a clear opportunity to meet the needs of C2C customers seeking

fast delivery at an affordable price. We developed Shop2Shop by Chronopost specifically for this market segment.

What about new services?

Affordable, fast delivery for C2C marketplace customers between pick-up locations in 2-4 days. We also have a B2C offering of competitively-priced delivery in 2-3 days, which we launched in 2022.

What role does innovation play in your offering?

Much of our innovation revolves around sustainability, which is a key concern for our customers and ourselves. Among our recent

innovations are branded reusable packaging and 100% low-emission delivery for the Paris region and nearly 70 cities in France using electric vehicles. We're also working toward an e-label.

How do you expect the C2C market to evolve in the coming years?

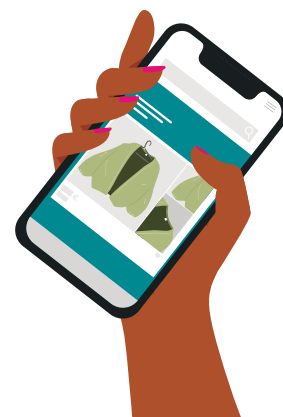
The market is booming and in my opinion this will continue. Major platforms have extremely positive forecasts for the next five years, and we do as well.

What factors can best support the success of C2C?

The agility of our hubs, the extension of our branch network, and our evolving organizational structure are all key. Customer satisfaction and innovation will also play a determining role in the ongoing success of C2C. For example, offering our customers sustainable delivery options is both innovative and completely consistent with the C2C philosophy. ●

"The market is booming and in my opinion this will continue.

Major platforms have extremely positive forecasts for the next five years, and we do too."



72%
of regular e-shoppers buy and/or sell products on second-hand platforms.

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

Focus on C2C users

Whether for economic, practical, or sustainable reasons, e-shoppers are increasingly drawn to C2C platforms. Most either buy and sell products or only buy products, although the percentage of those who only sell products grew in 2023.

The average C2C user tends to live in a city (86%), 44% of C2C users are married and 31% are single and is very familiar with e-commerce, having begun online shopping more than 10 years ago (37%) or 5-10 years ago (25%).



C2C shoppers

— C2C platforms have never been so popular. Who are the C2C shoppers, and what are their tastes and motivations?

How much are they buying?



58% of regular e-shoppers buy products on C2C platforms.

35%

are buying more second-hand products these days.

44%

are buying from C2C platforms at least once per month.



Focus on reasons for selling products online

Regular e-shoppers selling on C2C platforms do so primarily to free up space in their homes, but also to find a new owner for products in good condition that are no longer used, or to earn a little extra money. Nearly a quarter of sellers say that getting rid of unwanted gifts is their reason for choosing

Why are they buying?

65%

of C2C shoppers buy second-hand products to save money.

25%

of C2C shoppers buy second-hand products from small retailers.

34%

of C2C shoppers buy second-hand products to support sustainability.

What are they buying?

The top 3 product categories for C2C shoppers are

1. fashion
2. shoes
3. beauty & health care

C2C shoppers made an average of

45

purchases online in 2023.

48%

of social media users shop directly from social media

70%

of social media users use them at least one shopping purpose.



Social media: new shopping Eldorado?



Christopher Kowalewski,
Group Social Media Lead
at Geopost

— In an increasingly connected global marketplace, social media sites offer a wide array of benefits for e-shoppers and e-tailers alike—and constant innovation means we can expect much more to come.

How would you define e-shopping on social media?

E-shopping on social media can take several forms. For example, “social commerce” is where an e-merchant sells physical goods on social platforms with integrated shopping features; “live shopping” is a virtual, interactive moment that aims to be as close as possible to a real-life, in-store experience; and “Augmented Reality try on’s” allow social users to virtually try on or position goods in a real-world context before purchasing.

What are the benefits of social shopping for brands?

While a traditional e-commerce approach is passive, social media offers a vast list of tools for merchants to get their brand known by more people. Sponsoring is one of the best ways to put brands and products front-and-center, but there is also user-gene-

rated content where customers post about the products they’ve bought, as well as live shopping.

Will social media become the new shopping Eldorado in the coming years?

It’s plausible to assume that social media will continue to grow as an important space for e-commerce. Social media platforms are always devising novel features to monetize, even as new technologies like NFT and Generative Artificial Intelligence promise both

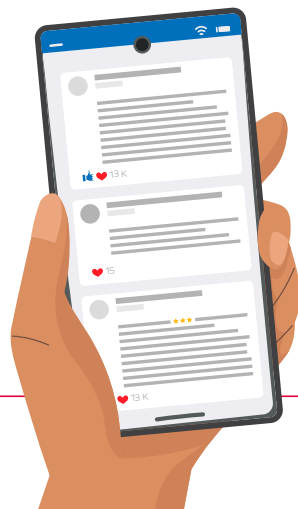
disruption and opportunity. It may be difficult to speculate on how social media will harness this nascent tech, but the need to further monetize platforms ensures that e-commerce will remain a highly innovative space. ●

“While a traditional e-commerce approach is passive, social media offers a vast list of tools for merchants to get their brand known by more people.”



Top three reasons for shopping via social media

- | | |
|---|-----|
| 1 Shopping inspiration | 28% |
| 2 Shopping information | 26% |
| 3 Shopping on recommendations of friends and family | 22% |



Business: Back to basics

— Tighter budgets drove e-shoppers to pay closer attention to their purchases, resulting in a “back to basics” attitude. In addition to ongoing price sensitivity, e-shoppers focus more on the products they purchase, showing greater interest in detailed descriptions, attractive prices, and smooth delivery.



The product at the heart of the experience



Carmen Cureu,
Market Research
Director
at Geopost

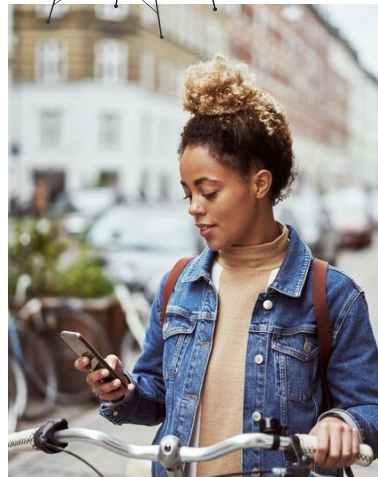
— Faced with inflation, e-shoppers are according greater importance to the product. More than ever, they want accurate information, good deals, and no disappointment.

To what extent has inflation impacted e-shopping?

We have seen several types of pragmatic trade-offs in response to inflation. For example, pleasure purchases have diminished, while staple products have become much more important. The economic context also caused a certain “back to basics” trend to arise, with the product itself taking priority. This means that while website ergonomics, delivery options, et cetera all remain important in the overall e-shopping experience, consumers in 2023 concentrated more on what they were actually buying than on anything else. Also, not only are e-shoppers more attentive to good deals than ever, but the emergence of C2C that we highlighted last year has been clearly confirmed this year.

What are some ways in which e-shoppers demonstrated this “back to basics” mindset?

One of the most immediate statistics that reveals this trend is the two-point increase in the importance of detailed product descriptions as a purchase driver. With tighter budgets than in years past, e-shoppers want to be sure that the product they receive matches the product’s description because the closer the match, the less likely the consumer will be to return it. This is all the more evident



in a context where returns come at a cost to the consumer. Likewise, there has been a two-point increase in the importance of transparent and complete return costs indicated prior to the purchase—and here we see a clear cause and effect between return policies and e-shopper behavior.

What is the relationship between the product and the overall e-shopping experience?

Product-related issues are among the main reasons given by consumers who found their most recent e-shopping experience to have required extra effort. These include having difficulty deciding between several products, facing out of stock issues, and being offered a choice of products that was too limited. To summarize, today’s e-shoppers want and expect to be able to buy the product they desire, to receive the product exactly as they imagined it, and for there to be no need to return it, especially if any cost is associated with the return process. ●



68%
consider that shopping
online saves money.

62%
believe that price is the most
important purchase factor.

Back to basics

—More than ever, e-shoppers are focused on the product. They pay closer attention to product descriptions and are more inclined to list product-related issues as reasons for a high-effort purchasing experience.

What persuades e-shoppers to make an online purchase?

23%

of regular e-shoppers cite detailed product descriptions (+2 pts vs. 2022).

What dissuades e-shoppers from making an online purchase?



of regular e-shoppers cite poor online reviews of the product.



The top 3 reasons for extra time spent on the last purchase online are product-related

- 21%** I didn't know which product to choose I was hesitating between several different ones.
- 20%** The specific product I wanted was out of stock.
- 17%** The choice of products offered on the website/app was too limited.

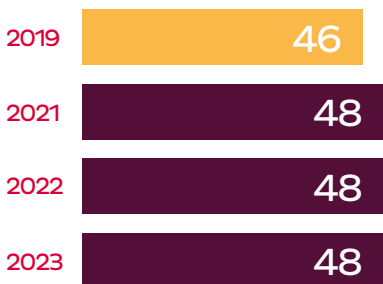


E-commerce proves its resilience

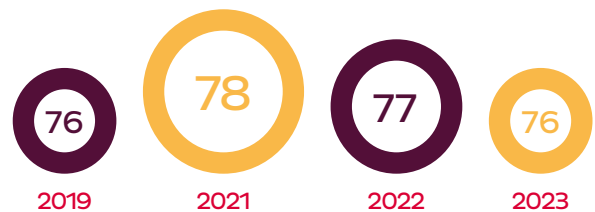
– In the wake of the post-Covid surge, the overall share of e-shoppers has slightly decreased in Europe, while the number of regular e-shoppers has remained stable.



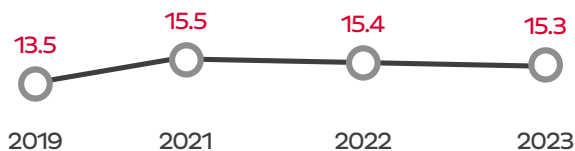
Share of regular e-shoppers among total e-shoppers (%)



Share of e-shoppers among total population (%)



Average share of online shopping for regular e-buyers (%)



Good deals online

While saving money has always been among the most powerful motivators for shopping online, tighter budgets in 2023 caused even more e-shoppers to express the conviction that e-commerce helps them save money (67% vs 65% in 2022), with more regular e-shoppers than ever mentioning price as the number one factor in their purchasing decision (62% vs 60% in 2022). So convinced are e-shoppers

of the deals to be found online that nearly seven in ten declared being always on the lookout for a really good deal. And with the rise of C2C and social media shopping, good deals online are indeed plentiful.



Can inflation be a good thing?



Hugues Poissonnier,
Full Professor at
Grenoble Ecole de
Management

– Like all challenges, inflation also offers opportunities. For those willing to take a new approach, the inflationary context could instigate a strategic shift towards a healthier, more sustainable business model.

What are the challenges that inflation poses to companies today?

Inflation presents a certain number of difficulties related to additional costs. If companies increase their prices in response, they risk losing customers; if they don't, they risk losing margin.

Beyond inflation, many companies today are facing real shortages of raw materials such as energy resources, compounded by a difficult geopolitical context.

How can inflation be a potential source of opportunities for businesses?

Companies have long contended to offer the lowest prices possible, often to the detriment of quality. This can be technical quality, but also social or environmental quality. For example, the product may be inexpensive, but it comes at the cost of poor supplier relations or questionable ecological practices. But when inflation comes into play, it becomes much more risky to engage in this type of

cost-cutting strategy. Companies have to think of other options.

Can inflation encourage the emergence of new business models?

Absolutely. By embracing a new approach based on high-value rather than low-cost buying, companies place that process closer to the heart of their business model. Their future competitive advantage thus becomes increasingly based on the quality of the materials they buy as well as on the quality of relationships developed with suppliers.

The new mission given to buyers is then to (partly) replace cost killing with value creation, which motivates them to help make their company the preferred customer of their best supplier. This mindset is far more collaborative, as well as more socially and ecologically virtuous.

What advice do you have for companies facing the challenge of inflation?

Generally speaking, businesses can move toward a more virtuous model as



"Why not offer customers higher quality products in exchange for the higher price they pay?"

long as they can manage to move upmarket and target a higher segment. So instead of a strategy that starts with marketing and ends with low-cost buying, consistent with the positioning chosen, they could do the opposite, i.e., start with a desire to have high-quality supplier relationships that facilitate

innovation and improve product quality (technical, social, environmental). This may be more expensive, but if companies can sell higher volumes, or raise their prices reasonably, then the overall margin can be conserved and even improved. ●

Society: new generations new expectations

— Not so long ago, e-shopping was a novelty, but for today's younger generations, it's second nature. From social media to new technologies, from online-offline integration to personalized purchase experiences, the tastes and habits of these consumers are shaping the future of the industry.





Through the eyes of Gen Z

27%
of C2C users are 18-29 years old.

26%
of regular e-shoppers are 18-29 years old.

25%
of OOH users are 18-29 years old.



Focus on GenZ

Born between 1997 and 2012, Gen Z displays particular habits when it comes to e-shopping. Members of this generation care deeply about efficiency (fast purchase, being able to choose the speed of delivery, etc.) and tend to rely on opinions about a website when shopping online. They tend to be heavy users of C2C platforms (in both buying and selling) and find this mode of shopping trendier than Regular e-shoppers do.

They are also heavy users of social media for shopping and are much more influenced by social media than Regulars are when they choose a website or application to shop from. In terms of delivery, they diversify the way their parcels are delivered even more than the Regulars.

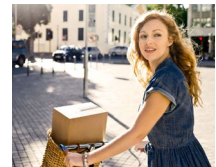
Overall, they are more demanding than other e-shoppers throughout the entire process of buying online (purchase, delivery, return).

E-commerce dynamics

— While European e-shoppers have much in common, each country also has its own distinctive relationship with e-commerce. Here, we highlight a few of the more significant market-specific statistics of 2023.



55%
of Irish e-shoppers are regular e-shoppers (vs EU average of 48%).

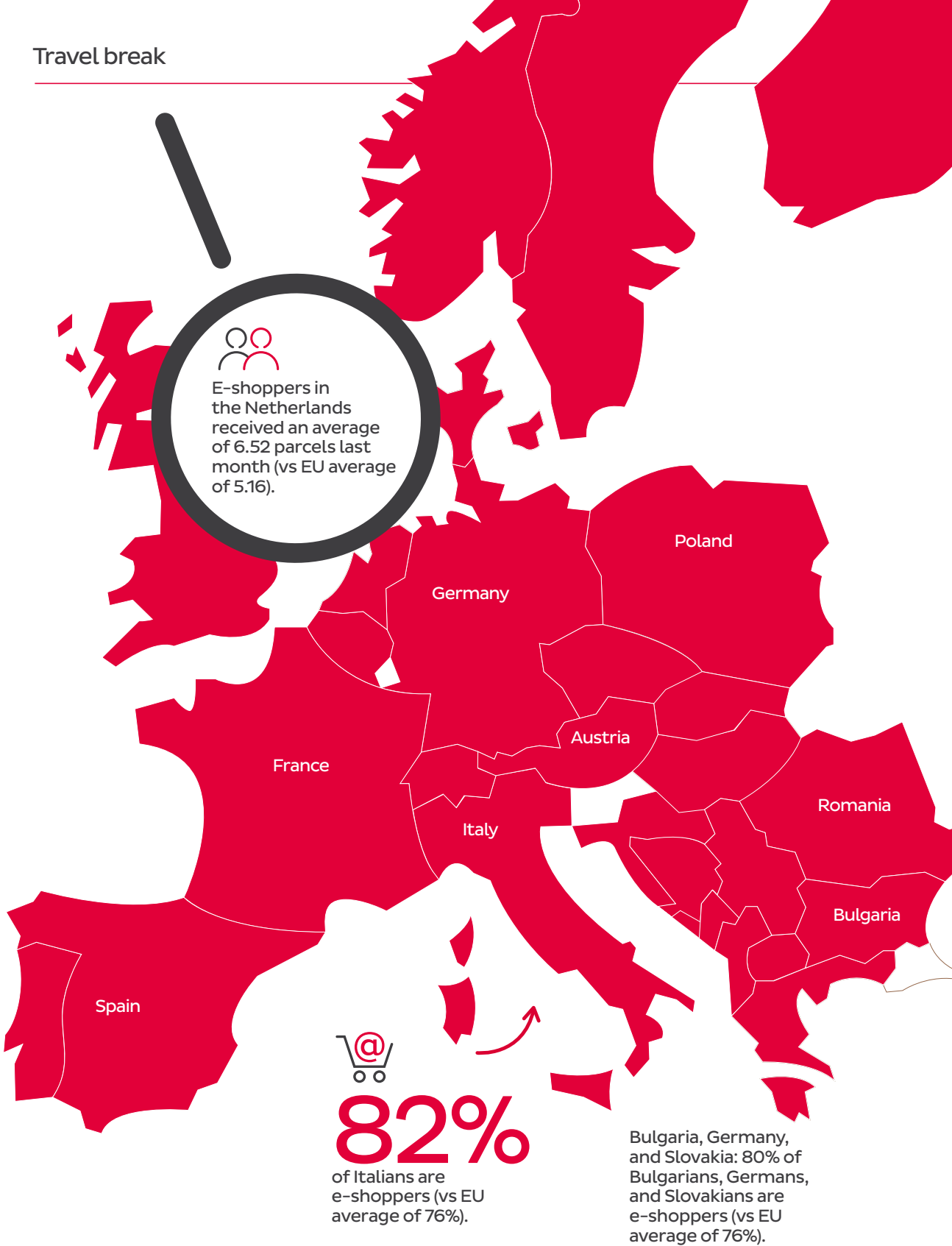


55%
of Polish e-shoppers are regular e-shoppers (vs EU average of 48%).



E-shoppers in Great Britain received an average of 5.92 parcels last month (vs EU average of 5.16).





Habits: the rising power of out-of-home

— While home remains the favourite delivery location for most e-shoppers, OOH delivery continues to grow in popularity, reaching new records of use in 2023. Offering convenience, flexibility, security, and control, OOH solutions are perceived by more and more e-shoppers as the right answer to their on-the-go lifestyles.



OOH enchants Italy

— Out-of-home delivery solutions have soared in popularity in recent years, becoming Italy's second-favourite delivery choice in 2023.



Alberto Luisi,
CEO and Founder
of Fermopoint,
a BRT company

In Italy, the net out-of-home market gained 8 points between 2022 and 2023. Can you explain this dynamism?

Italy is catching up with the other big European countries. E-shoppers in Italy are showing interest in having a flexible customer journey, as well as the ability to access to a variety of delivery options. 37% of the Italian regular e-shoppers use more than one delivery place (+7pts vs 2022); and a growing number of e-shoppers are delivered out-of-home: 39% (+8pts vs 2022).

In addition, the growing attention to economic and sustainable factors and the arrival of C2C players have made the Italian market more familiar with OOH solutions.

What are the benefits of a hybrid network (parcel shops + lockers)?

This hybrid network allows the end-consignees to benefit from a flexible set of delivery options, matching their on-the-go lifestyle. On the network side, this provides service for activities that do not have a dedicated staff.



“The growing attention to economic and environmental sustainability and the arrival of C2C players have made the Italian market more familiar with OOH solutions.”

How do you foresee the out-of-home market in the years to come?

I think that OOH will become the standard and preferred model of delivery and pick-up for B2C and C2C, especially in light of the economic context, increased transportation regulations, and the need for convenience. ●



56%

of OOH users say that their mobile is quickly becoming their main shopping tool.

61%

of OOH users look for reviews and ask for recommendations online before making a purchase.

A Pickup point always near by

With OOH popularity at an all-time high, Geopost has been steadily expanding its Pickup network over the past several years. In 2023, it reached a new milestone of more than 100,000 Pickup points across Europe. Offering flexibility, affordability, and convenience, locker and in-store deliveries account for nearly a quarter of e-shoppers' usual delivery locations.

Of the 100,000 Pickup reached in Europe, 25% are located in Poland, 18% in France, 10% in the UK, and 8% in Germany and Italy. Aiming to meet the growing demands of e-shoppers who increasingly prefer OOH solutions, Geopost intends to further strengthen its OOH network around the world.

In-depth analysis

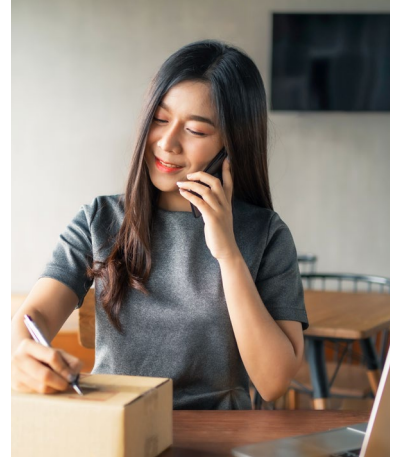
– The 2023 Geopost e-shopper barometer report is based on fieldwork conducted from May 31, 2023 to July 19, 2023.



23,974

participants across 22 European countries.

The 2023 Geopost E-shopper barometer report is based on fieldwork conducted from May 31st, to July 19th, 2023. The data were gathered through blind*, online interviews with 24,233 participants across 22 European countries (Austria, Belgium, Bulgaria, Croatia, Czech Republic, Estonia, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Switzerland, UK).



We interviewed between 801 and 1,570 participants per country. These participants, aged between 18 and 70, have purchased at least one online product per month followed by delivery since January 2023. They were identified from a panel representative of the population in terms of age, gender and SEC. 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.

*blind: interviewees are unaware of who requested the study.



Find out more



The full report is available online at geopost.com



Stay tuned for
our next special issue
on C2C and OOH.

