



UNDERSTANDING THE EUROPEAN ONLINE SHOPPER

(AND HOW TO MAKE THEM BUY)



WELCOME TO THE DHL ONLINE SHOPPER REPORT 2022

HELPING YOU TAKE YOUR E-COMMERCE
BUSINESS TO THE NEXT LEVEL

**Selling internationally is crucial for your business growth.
But how do you decide where and how you're going to sell?**

To help you answer these essential questions, DHL commissioned a study of online shoppers across Europe to gain a deeper understanding of their online shopping habits.

Our survey took place in the first half of 2022, across nine European markets (UK, France, Spain, Germany, Sweden, Poland, Netherlands, Czech Republic and Austria). Participants were asked to complete an online survey, which examined their attitudes to cross-border shopping as well as their more general online shopping preferences. We covered a range of topics including delivery and payment preferences, the importance of returns, and the role sustainability plays in where and how they choose to make their online purchases*.

Armed with these insights into how shoppers across Europe think and act, you can tailor your offers and services accordingly – and grow your business internationally.

*Some percentages in this report have been rounded up or down to the nearest whole number.



A FEW THINGS YOUR CUSTOMERS TOLD US

Read on to discover the results
of these in more detail

- Cross-border shopping
- Product categories and spend
- Delivery and returns
- Sustainability
- The online shopping landscape
- What online shoppers said





EXECUTIVE SUMMARY

CONSUMERS NEED THEIR GOODS QUICKLY AND WITHOUT HASSLE

Our survey found that consumers have heightened expectations of home delivery and online shopping, with a need-it-now mentality shaping demands for efficiency and speed.

Shoppers are used to getting their local deliveries fast, which makes international delivery times feel super-slow. So, domestic is setting the delivery pace and the expectation levels for international to follow.

No surprise there. But what about buying online from overseas e-tailers?

THE HEADLINES FROM OUR SURVEY ARE IN

Cross-border shopping is growing but there are concerns to address. Your European shoppers say:

- They are worried about customs costs when buying from overseas providers
- They feel cross-border purchasing will lead to longer delivery times
- Language barriers are an issue for them: Product descriptions and complaint procedures are their main pain points
- They are concerned about a complex returns process
- They want to be able to pay in their local currency and this isn't always available
- They feel shopping in their own country is safer and more reliable
- Using Amazon is easier than buying from a cross-border e-tailer – proof that the Amazon fulfilment process ensures shoppers aren't aware of where the product is coming from
- They are worried consumer protection laws will be different in other countries
- Their carbon footprint is a concern; shoppers prefer to buy domestically for environmental reasons

CROSS-BORDER SHOPPING

Read on to discover the results in more detail

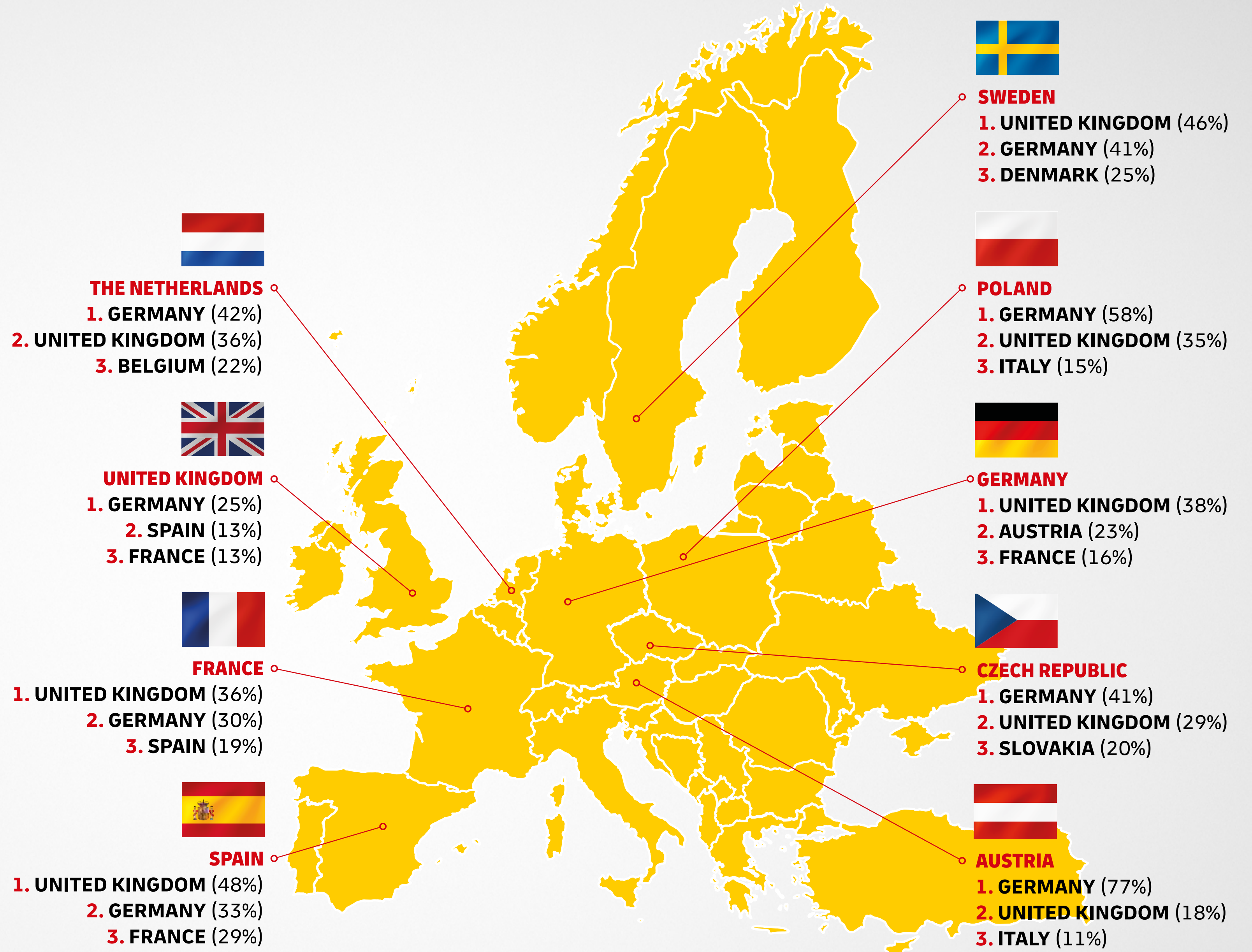
■ **Cross-border shopping**

- Product categories and spend
- Delivery and returns
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ONLINE SHOPPERS IN EACH COUNTRY

WHERE THEY BUY FROM AND WHEN THEY BUY EUROPEAN CROSS-BORDER*

There's a significant pattern: With all our surveyed countries, most bought from Germany and the United Kingdom, followed by their near neighbors.



*Respondents were offered multiple choice selections for this question.

WHO BUYS FROM OTHER COUNTRIES?

WHO YOU'RE TARGETING FOR CROSS-BORDER SALES

Overall, male shoppers under 24 years old are those most likely to shop cross-border.

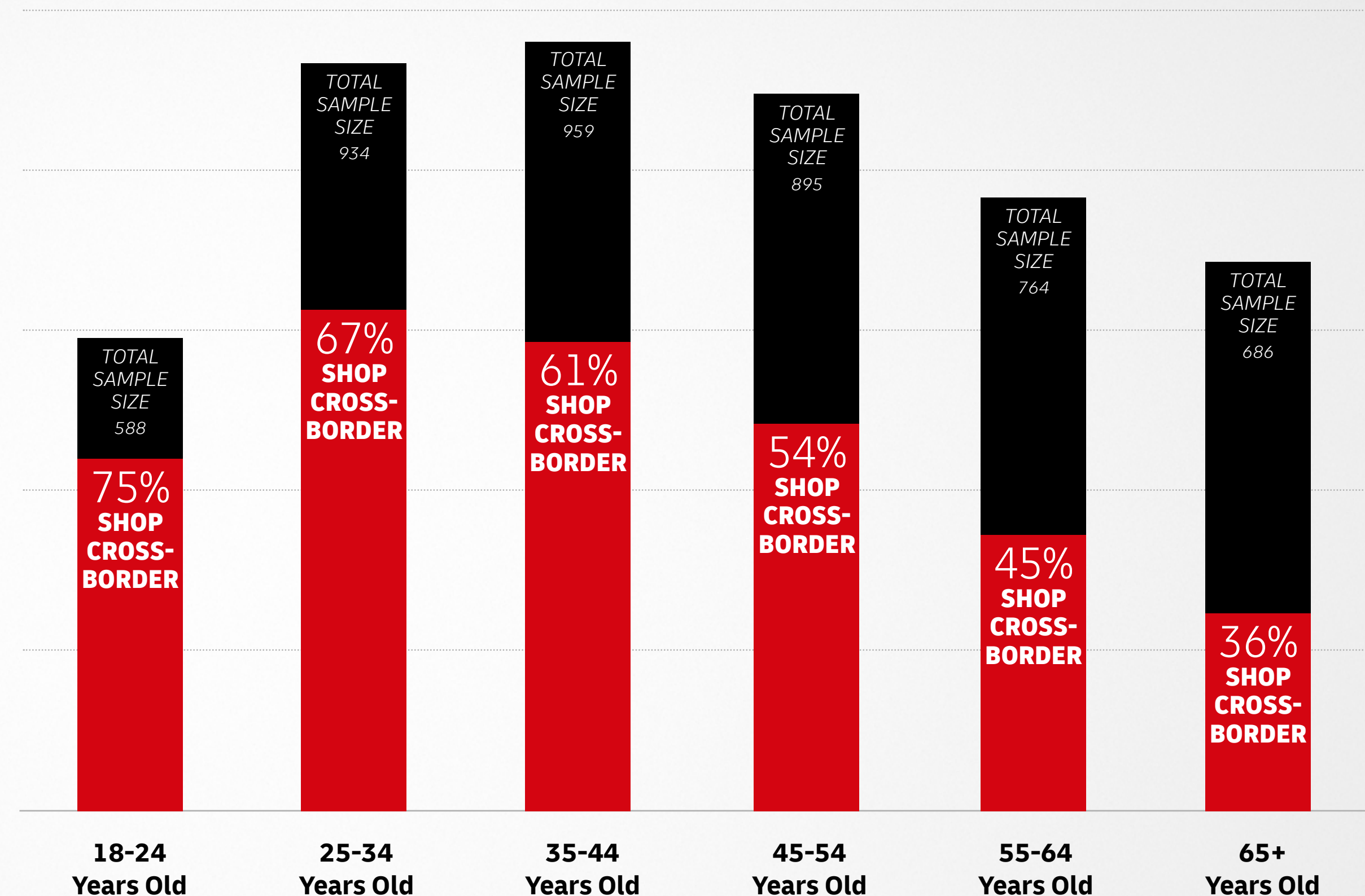
However, in the UK, women are slightly more likely than men to shop cross-border and they tend to be from a slightly older demographic (25 to 34 years old).

In France and Poland, women are also more likely to make cross-border purchases but tend to be in the youngest age group (18-24 year-olds).

So to conclude:

The largest group of cross-border online shoppers lies in the 25-44 year age group, however the 18-24 year-olds over-index on likelihood to shop cross-border (75% vs 64%).

SAMPLE BY AGE GROUP



The chart above shows the respective size of each age group in the sample surveyed across the 9 markets, and the propensity of each age group to buy cross-border.

WHY DO ONLINE SHOPPERS BUY CROSS-BORDER?

Our survey* discovered there are two main reasons for this:

1 BEING ABLE TO BUY BRANDS OR PRODUCTS NOT AVAILABLE IN THEIR HOME COUNTRY

2 FINDING LOWER PRICES IN OTHER COUNTRIES

The most common reason for people to shop cross-border is to purchase a product or brand that isn't available in their country – overall, 45% cited this as the main reason. This was followed by lower prices (33%) and being able to find better quality products (19%).

Europe is a mature e-commerce market, with a strong, reliable infrastructure compared to other continents. And with consumers becoming increasingly tech-savvy, the shift to online shopping was always predictable.

Then COVID hit. It became the big game changer for accelerating people's online shopping behavior. Even now that Europeans are free to visit stores again, we found that the majority of shoppers preferred to continue shopping online. This isn't free of issues, though: Our survey also discovered shopper distrust when it comes to international delivery times and complicated returns.

*Respondents were offered multiple choice selections for this question.



Online shoppers would have more confidence shopping cross-border if some of their concerns (such as simple, seamless returns process) were mitigated. Ultimately, a consumer should see & feel no difference between a domestic or cross-border parcel delivery in Europe.

Alex Schmitz-Huebsch, Vice President,
Global Product & Sales Management,
DHL eCommerce Solutions

HOW FREQUENTLY DO THEY BUY CROSS-BORDER?

More than half of the cross-border shoppers we surveyed purchase from abroad at least once per month, and 20% think they'll buy cross-border more frequently in the next year – which presents an opportunity for e-tailers across Europe to widen their customer base.

67%

OF CROSS-BORDER SHOPPERS MAKE PURCHASES FROM OTHER MARKETS AT LEAST ONCE PER MONTH

20%

SAY THEY'LL MAKE MORE CROSS-BORDER PURCHASES IN THE NEXT 12 MONTHS

UK shoppers are far more insular, with only 36% buying cross-border. Brexit surely has a part to play here, making UK buyers feel less connected to the European mainland. As a result, the real opportunity lies in other European markets.

There are several reasons why British consumers may choose to buy locally. Partly it's about avoiding complex supply chains and slow delivery times, but it's also about supporting local businesses and bolstering the local economy.

Dominic Harrison, Director of Global Trends at Foresight Factory

UK SHOPPING: THE BREXIT EFFECT

EXPERT ASSESSMENT

Brexit has played a part in UK shoppers' reluctance to buy from abroad, with the most significant impact being slower delivery times.

Brexit is still very much unfinished business. British and EU leaders finally reached the EU-UK Trade and Cooperation Agreement on 24th December 2020. But is this the final word on the matter? It's unlikely.

For now, e-tailers are faced with stricter customs regulations and border checks for goods, not to mention an extraordinarily complex paperwork process that needs to be completed.

These additional hurdles have had the overall effect of delaying delivery times on either side of the Channel and have impacted UK shoppers' willingness to buy from countries in the EU.

Our research shows that a significant proportion of UK consumers feel an obligation to buy UK products for the good of the economy – a sentiment that will no doubt be heightened in today's cost-of-living crisis and in the shadow of Brexit. Meanwhile, many Britons associate locally produced products with being more environmentally friendly and trustworthy than those manufactured abroad.

*Dominic Harrison, Director of Global Trends
at Foresight Factory*



WHAT THE SURVEY RESULTS MEAN FOR YOUR BUSINESS



CROSS-BORDER DELIVERY NEEDS TO BE SECURE AND RELIABLE

If you sell cross-border to shoppers in Europe, you need to go the extra mile to reassure them of your trustworthiness and ability to deliver safely.



YOU'RE WELL PLACED IF YOUR BUSINESS IS IN GERMANY OR THE UK

When it comes to the countries that people buy from, cross-border shoppers turn mostly to the UK and Germany. If your business ships from either of these, it's time to market further afield.

PRODUCT CATEGORIES AND SPEND

Read on to discover the results in more detail

- Cross-border shopping
- Product categories and spend**
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THE MOST POPULAR PRODUCT CATEGORIES

Domestic

Overall, clothing and footwear is the most popular category of online shopping in Europe, especially in the UK. This could be one of the reasons many UK retailers are introducing paid returns, in a curb to reduce excessive returns-per-order. The popularity of this category is considerably higher amongst women than men, who are more likely to buy consumer electronics online.

Cross-border

Clothing and footwear also topped our poll of the most popular products to buy from abroad, with almost 60% of cross-border shoppers purchasing from this category*. This is perhaps unsurprising given the changing way in which people are shopping, alongside the continued demise of high-street choice.

Consumer electronics are also an important category with 40% of consumers in Spain and Poland saying they purchase from this sector when shopping cross-border.

The majority of cross-border customers shop from abroad once a month and a significant proportion said they expect to do so more frequently in the coming year – although 28% of shoppers in the Czech Republic say they will buy cross-border less frequently, with 25% of German shoppers and 22% of shoppers in the Netherlands saying the same. So if you're targeting these markets you might have to work harder in the coming months and years to convince these shoppers to buy.

CROSS-BORDER PURCHASES BY CATEGORY

	Austria	Czech Republic	Sweden	Poland	Spain	France	Germany	The Netherlands	UK
Clothing & Footwear	57%	62%	59%	61%	61%	66%	54%	52%	65%
Consumer Electronics	29%	36%	21%	40%	40%	28%	24%	25%	20%
Sport, Leisure & Hobbies	28%	31%	28%	24%	26%	22%	27%	27%	18%
Cosmetics	16%	15%	17%	23%	15%	16%	14%	14%	22%
Furniture & Homeware	15%	13%	10%	14%	14%	13%	12%	10%	12%

*Respondents were offered multiple choice selections for this question.

WHO ARE THE BIG SPENDERS?

When we look at general online shopping spend (taking into account both domestic and cross-border purchases) the typical overall monthly spend on online shopping is between €50 and €100, with 43% of respondents in France, 39% in both Spain and Poland, 38% in Sweden, 36% in the UK, and 33% in the Netherlands, spending within this range.

The Austrians and Germans were the biggest online spenders: over 25% of Austrians said they spent between €100 and €200 per month. One interesting contrast between these two countries was the age of the biggest spenders. In Austria they were the 45-54 year-olds, 11% of whom spent over €250 per month. Across the border in Germany, the same percentage of 25-34 year-olds spent over €250 per month.

At the other end of the scale, in the Czech Republic, 37% of shoppers spent less than €50 per month online.

	Austria	Czech Republic	Sweden	Poland	Spain	France	Germany	The Netherlands	UK
Less than £50/€50	27%	37%	30%	34%	32%	27%	27%	31%	33%
Between £50 and £100/€50 and €100	40%	36%	38%	39%	40%	43%	42%	32%	36%
Between £100 and £250/€100 and €250	25%	20%	24%	23%	23%	23%	23%	27%	23%
Over £250/€250	8%	7%	8%	4%	5%	7%	8%	9%	8%

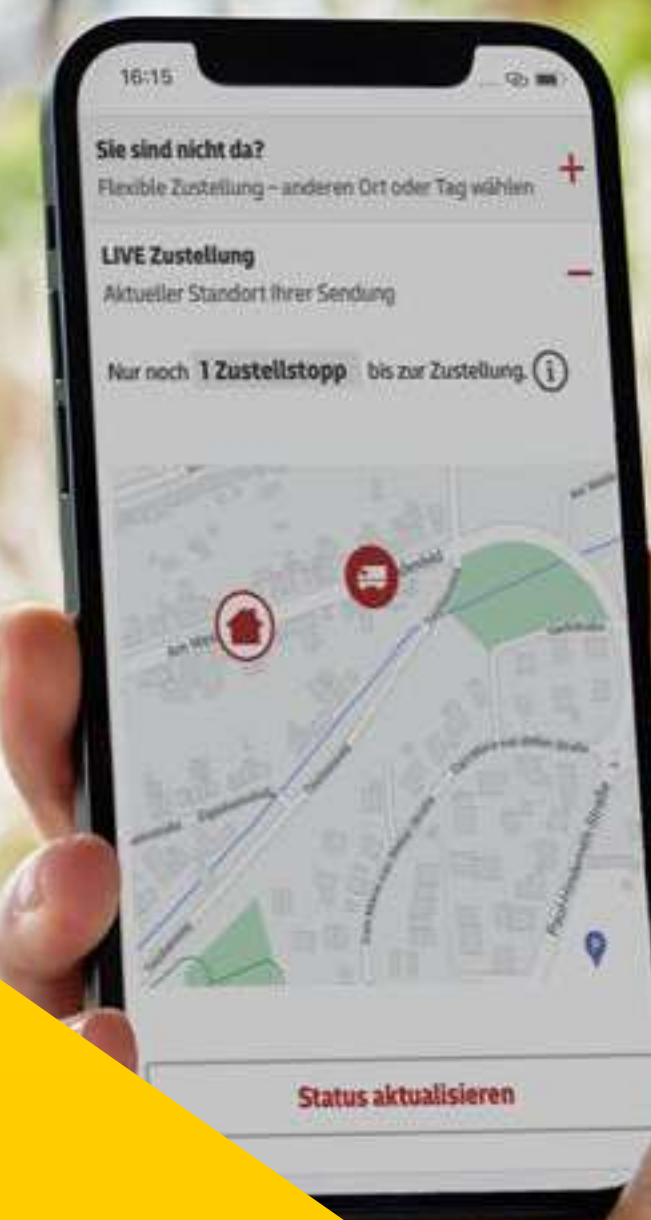


Identify the most fertile markets for your products. For example, if your business sits within the most popular product category – clothing and footwear – and your market is younger adults, you should look to Germany as your strongest potential market where 34% of 18-24 year-olds buy from the clothing and footwear category.

DELIVERY AND RETURNS

Read on to discover the results in more detail

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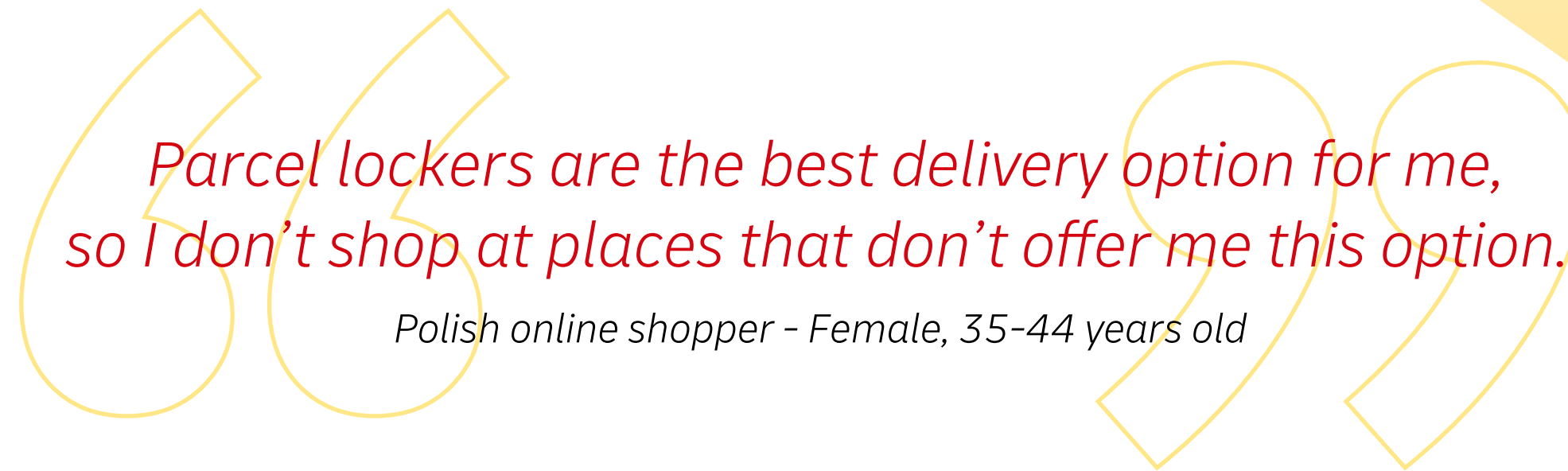


HOW MUCH DO DELIVERY OPTIONS IMPACT CONVERSION RATES?

In short, a lot. While over 96% of our online shoppers said they were happy with the delivery options offered with their last online purchase, many told us they had previously abandoned their shopping cart because their preferred option wasn't available: 85% said so in Austria, over 75% in the UK, Sweden and Spain, 72% in France and 70% in Germany. Delivery options really matter to conversion rates.

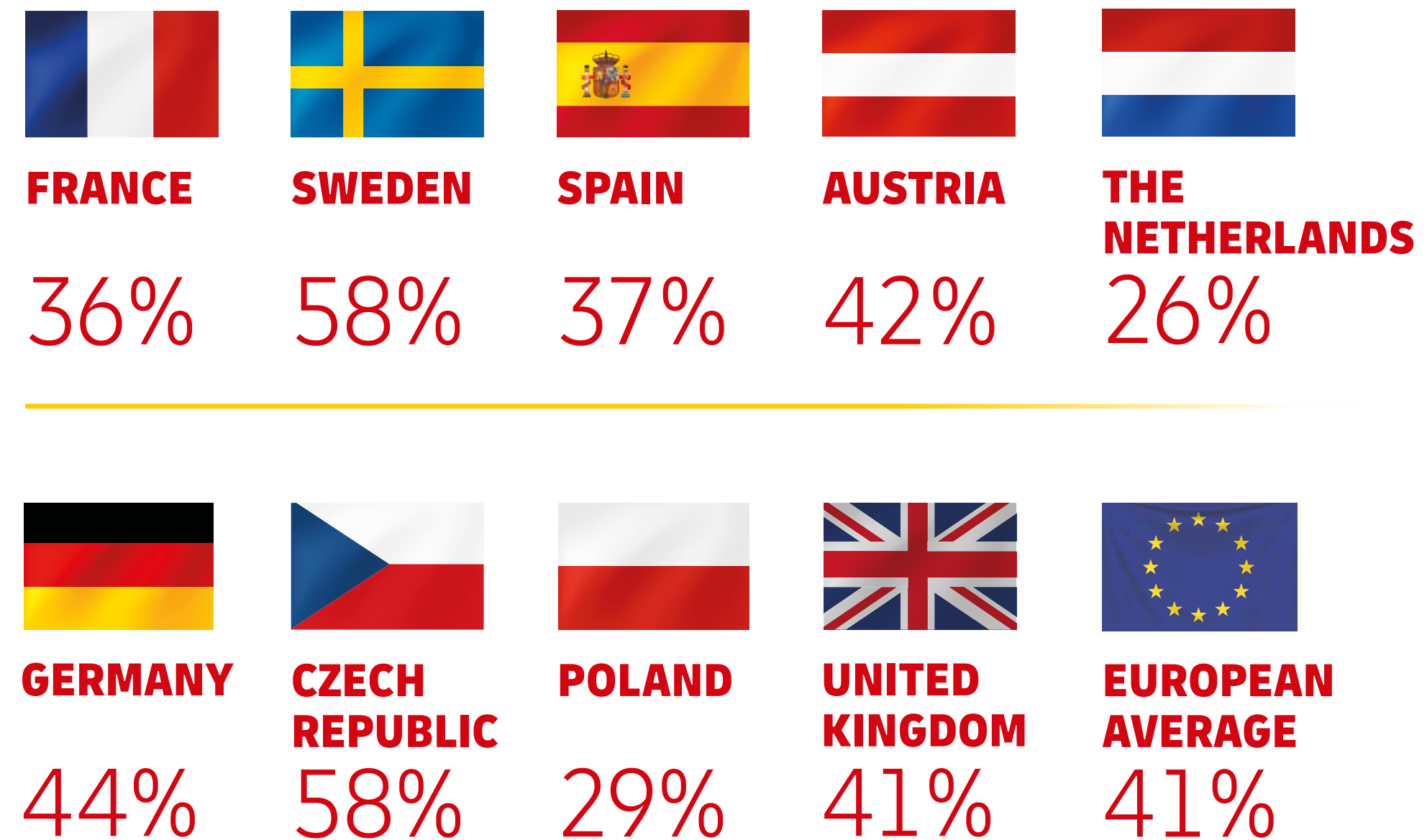
Shoppers in Poland placed least importance on this with 65% saying they had abandoned their basket if not offered their preferred delivery option.

For most countries surveyed, over half of shoppers said it was important to know the identity of the delivery provider before paying for their purchase. 41% said they would avoid buying from an e-tailer altogether if they weren't happy with the delivery provider being offered. This figure rose to 58% for both the Czech Republic and Sweden.



THE POWER OF A GOOD DELIVERY PROVIDER

Percentage of shoppers saying they won't buy at all if they aren't happy with the delivery provider offered:



DELIVERY OPTIONS HAVE BECOME A CLEAR DIFFERENTIATOR

93% of European shoppers say that where they choose to shop online is influenced to a significant degree by the delivery options offered at checkout.

Offering a great product at a great price is no longer enough to earn a loyal customer base.



MOST EUROPEAN SHOPPERS STILL PREFER HOME DELIVERY

We found that the vast majority of European shoppers preferred to have purchases delivered to their home – for example, 82% in France. The least popular option was to have the delivery left with a neighbor, only 5% opted for this. Here are the overall results:

- More than 80% of shoppers in Austria, Spain, France, Germany, the Netherlands and the UK want home deliveries
- 54% in Poland prefer to collect items from parcel lockers
- A third of shoppers in Czech Republic choose parcel shops, and in Sweden it's a quarter of shoppers.

To conclude:

It's no surprise that most (73% on average) want home delivery, but it's wise to include service points and parcel lockers as options for your customers, as the demand for these is increasing in many countries.

SHOPPERS COULDN'T DECIDE ON DELIVERY COSTS

As for delivery costs, shoppers were split about whether they should be included in the price of the purchase or shown at checkout. And this split was not just between countries but within countries! For example in the UK, exactly 50% of shoppers wanted them included upfront, while 50% wanted them shown at checkout!

BUT THEY ALL AGREED ON TRACKING THEIR SHOPPING

The importance of being able to track their deliveries, clearly matters to shoppers. 69% of residents in Austria said this was very important, rising to 94% in France, with the rest falling in between the two.

Amongst those who shop internationally, end-to-end tracking is significantly more important than for those who don't, with 82% saying it was very or quite important, versus 75% amongst those who don't purchase cross-border.

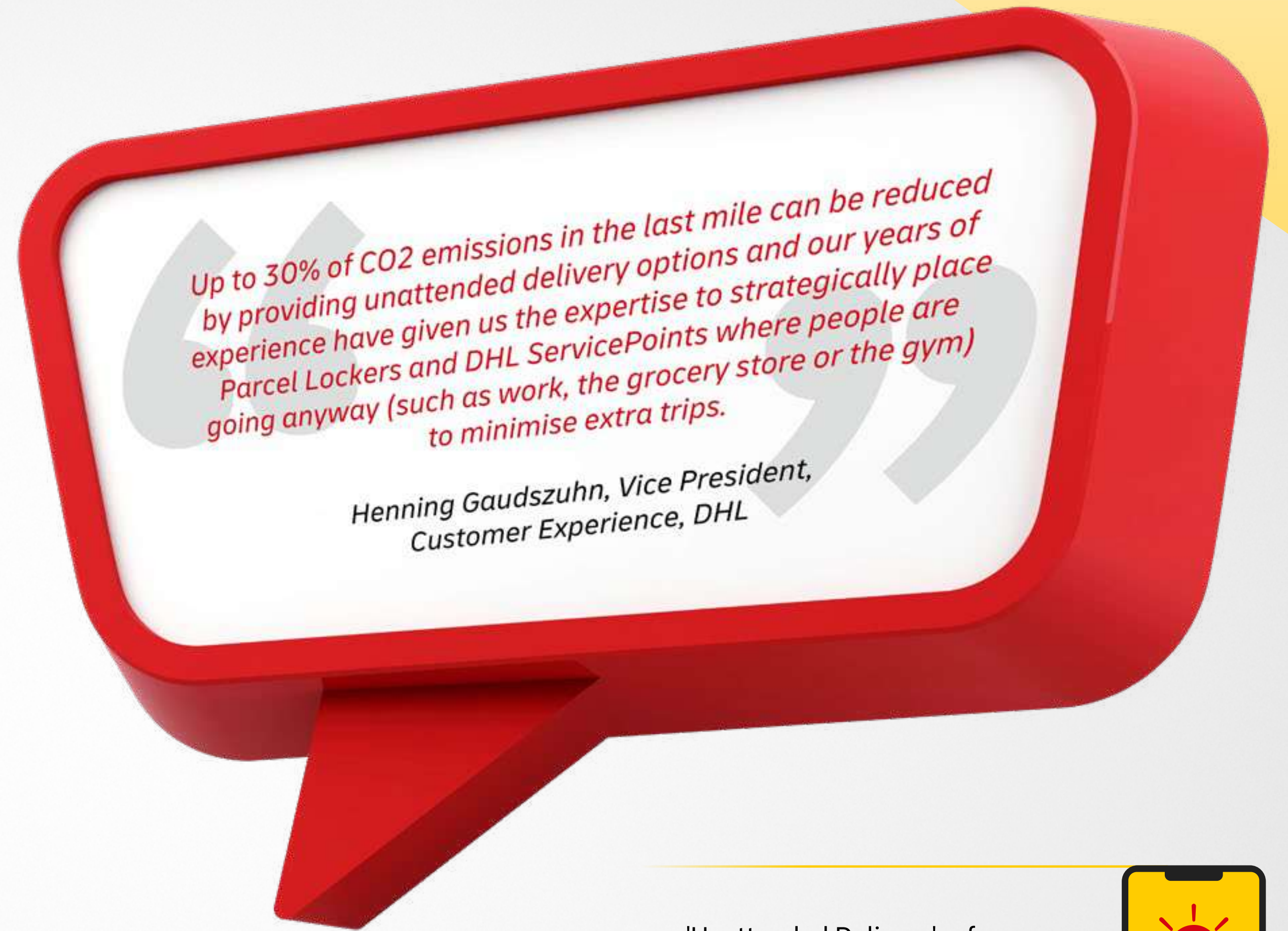
THE RISE OF THE UNATTENDED DELIVERY

Unattended delivery opens up new ways to enhance the shopping experience for both consumers and retailers. The most obvious advantage of unattended delivery is that customers can choose a pick-up location for their order nearby and prevent a delay in receipt of their parcel in case they are not at home.

This creates additional convenience for shoppers as they are able to plan and control the delivery of their purchases in a way that fits seamlessly into their daily routine and lifestyle. The ever-increasing network of parcel lockers and service points provides shoppers with the convenience of collecting their item without going out of their way.

Unattended delivery also has sustainability benefits. Delivering parcels in bulk means door-to-door deliveries can be minimized, which reduces drivers' carbon emissions.

UP TO
30% OF CO2 EMISSIONS
CAN BE REDUCED BY
PROVIDING UNATTENDED
DELIVERY OPTIONS



'Unattended Delivery' refers to parcels delivered directly to Parcel Lockers or Service Points (parcel shops). Look at our DHL service points [here](#).



FROM DELIVERY, TO THE IMPORTANCE OF RETURNS

Our research showed that, for most European online shoppers, having to pay for returns can be a deal-breaker.

The Spanish insist most on free returns, with 62% saying they only buy from e-commerce stores which offer them. But around half of shoppers in France, Germany, the Netherlands, the UK and Austria also limit their shopping in this way, falling to 38% in the Czech Republic and 31% in Sweden.

So, in a worst-case scenario for an e-commerce business, around half your potential European customers could rule out buying from you, for one simple reason: you don't offer free returns.

The sole exception is in the Czech Republic, where nearly one-third of shoppers told us that having to pay for returns is not an issue, providing they really want the item they're purchasing.

In every market, the vast majority of shoppers (75%+) want a returns label included in their parcel rather than having to print one out themselves.



We suggest you offer free returns on your goods, no matter which market you operate in. Your customers will look positively on your brand for doing so.



DHL'S TIPS FOR GREAT RETURNS

1

IS YOUR PACKAGING
GOOD FOR THE
RETURN JOURNEY?

Your packaging needs to survive both the outbound and return journey. You want your stock to be protected throughout, while consumers deserve packaging that is reusable. Are your shipping bags resealable? And are your cardboard boxes strong enough?

2

MAKE THE
PROCESS
CLEAR AND EASY

Is your returns process clear? Do you provide a pre-printed returns label? Make your returns process as simple as possible for your consumers; offer transparent, easy-to-follow information about your returns.

3

OFFER SIMPLE
DROP-OFF
OPTIONS

No one wants to travel all the way across town just to drop off a return. Choose a logistics carrier with a high density of drop-off points, ideally at high-traffic locations with long opening hours, such as local shops. Locker options are also a great addition, further widening your customer's options.

4

ACKNOWLEDGE
THE RETURN AND
PAY BACK QUICKLY

Tracking is vital for returns, too. Once received, be sure to notify your customer that the item has been accepted. For consumers, it is essential to get their money back for the returned goods as soon as possible. It's good for your trustworthiness and reputation.

SUSTAINABILITY

Read on to discover the results in more detail

- Cross-border shopping
- Product categories and spend
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DOES SUSTAINABILITY MATTER TO THE SHOPPER?

Yes, absolutely. Throughout all markets, shoppers thought sustainability was important, with 53% saying so overall.

The only places where the figure dropped below 50% were the Czech Republic (48%) and the Netherlands (40%). As you might expect, sustainability was more important to younger people. And in some countries (Austria, the UK and Poland), it mattered more to women than men.

More revealing were what sacrifices shoppers were prepared to make to be greener. We found that this varied hugely in different countries. Over 50% of shoppers in Austria, Spain, the Netherlands and the Czech Republic said they would sometimes pay more for green delivery, and just under 50% agreed in Poland, France and the UK.

In fact, according to independent research conducted by The Foresight Factory, over one-third of European shoppers want brands to use electric vehicles for deliveries. It also found out that completely recyclable packaging is considered one of the most important sustainable practices brands can adopt.

I want the retailers I use to offer eco-friendly packaging.

Polish online shopper - Female, 55-64 years old



DELIVERING SUSTAINABILITY

The desire for more sustainable delivery is there in principle, but the reality of how shoppers actually behave is less clear. In Germany almost a quarter say they would always pay more for a green delivery, which compared to Sweden where a quarter of shoppers say they would *never* pay for a green delivery. Shoppers were divided along the same lines when asked about paying for sustainable packaging. Austrian and German shoppers are the most likely to pay more for eco-friendly packaging with over a quarter of shoppers in these countries saying they would always choose to pay more.

IN GERMANY,

23% SAID THEY WOULD ALWAYS PAY MORE FOR GREEN DELIVERY

IN EUROPE,

58% ON AVERAGE WERE WILLING TO WAIT LONGER FOR A GREENER DELIVERY

Demographics tell a slightly different story though: Overall, the younger age groups were likely to always pay more – in fact almost a third of under 34 year-olds would always choose to pay more versus only 14% of over 55 year-olds.

However, all age groups were far more willing to sacrifice speed to be greener. Over 50% in all nine markets were willing to wait longer for a greener delivery – and, given the choice, shoppers in all markets would prefer a longer wait to paying more. Our findings go against the conventional wisdom that fast delivery and instant gratification are paramount for online shoppers.



WHAT THE SURVEY RESULTS MEAN FOR YOUR BUSINESS

FASTER DOESN'T ALWAYS BEAT GREENER

Offering a greener delivery option can encourage customers to buy from you. According to our research, most online shoppers would be happy to wait a little longer if they know delivery is more sustainable.

SOME WILL PAY MORE FOR GREEN DELIVERY

In some regions, notably Germany, Austria, Spain, the Netherlands and the Czech Republic, a significant number of shoppers will pay more for green delivery options.

GREEN DELIVERY AND PACKAGING PLAYS WELL WITH YOUNGER AUDIENCES

Having a sustainable approach to online shopping is of key importance to younger shoppers, with those aged under 35 twice as likely to want to pay for a green delivery and for sustainable packaging than shoppers aged over 45.



Brands can consider making sustainable options – from green delivery to recyclable packaging – the default option available. Indeed, consumers are on board with this approach: a majority of Europeans say that if a company can provide more sustainable options, this should always be the default option provided, unless customers request otherwise.

Margot Peppers, Senior Trends Analyst
at Foresight Factory

THE ONLINE SHOPPING LANDSCAPE

Read on to discover the results in more detail

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OUR OVERVIEW OF THE ONLINE MARKETPLACE

The e-commerce market in Europe is growing from strength to strength.

However, it's not all perfect in the world of online shopping and as much as European shoppers are turning away from high streets, they feel there are still improvements to be made to the online experience.

Consumers want shopping online to match the real-life experience as much as possible with clear, 360° pictures of products they're interested in. And they want to feel the support they would get from a sales assistant in a brick-and-mortar store. For example, AI-enabled chatbots can provide shoppers with personalized suggestions based on their shopping preferences.



Online shopping has been rising steadily across Europe, and the pandemic certainly gave this trend a boost. In many European markets, we have seen the steepest increases in uptake among old consumers. For example, the proportion of Baby Boomer online shoppers in Germany grew by 33% between 2018 and 2022. The younger generations still do more online shopping overall, but now that older consumers have become familiarized with e-commerce, the gap is closing.

*Dominic Harrison, Director of Global Trends
at Foresight Factory*

VISUAL SHOPPING EXPERIENCES ARE CRUCIAL FOR ONLINE CONSUMERS

From interactive and shoppable microsites to AR-powered try-before-you-buy services, more brands are innovating how they help consumers experience a product before they commit to buying. The pre-purchase phase can be fun as well as informative; it's why many household brands, like Nike, IKEA and Wayfair are all creating fully virtual experiences, where shoppers tour a digital space, with products from the online marketplace.

The key is to empower consumers to visualize the product in context. For some brands, that will mean harnessing AR capabilities and leaning heavily into dynamic visuals. For others, working alongside social media creators and directing customers to user-generated content from these brand advocates can achieve similar results.



EXPERT TIP

Having quality photos for e-commerce is the primary draw to attract people to your product. A product photo should include instant information such as size, color and in-situ use (such as being worn, or shown in the home). Showing multiple angles of the product is also beneficial. When a buyer is left to wonder what the other side of the product looks like, they become less confident in their purchasing decision.

I want to see better product photos and descriptions. Support should be easier to access prior to purchase and available for advice.

German online shopper - Male, 35-44 years old



WHAT CUSTOMERS REALLY VALUE WHEN SHOPPING ONLINE

It's important to note that consumers increasingly view value as a holistic proposition. They're not just evaluating price; they also want to know that the products they buy align with their ethical demands and beliefs.

Our data shows that a majority of consumers across the European countries we surveyed are interested in checking how ethical a product or service is before buying. Brands and retailers are catering to these demands by allowing shoppers to filter by eco-friendliness or browse according to cause. One example is FashionKind, a clothing retailer with a 'Shop by Cause' section on its website, with areas including 'Vegan', 'Women's Empowerment' and 'Artisan Craft'.

SOCIAL SHOPPING IS MORE THAN A TREND

Social-based e-commerce (selling directly on platforms such as Instagram, Facebook and TikTok) is a growing area in Europe with over half of online shoppers across the continent saying they have bought on at least one social platform. The highest take up is in Sweden where 28% have bought via Facebook, followed by Poland with 27% and the Czech Republic with 25%.



WHICH DEVICES DO THEY PREFER?

We discovered an age divide in most European countries, with older shoppers preferring to use their laptops and younger ones preferring smartphones. Laptops are more popular overall.

However, the two outliers are the UK and France. Overall, UK shoppers had the highest usage of smartphones at 48%, and their divide was more linked to gender – 64% of women prefer to use smartphones compared to just 27% of men.

In France, all shoppers still prefer to use their laptops rather than smartphones, regardless of age. Even in the youngest age group (18-24 years old) only 13% use their smartphones to shop.

	Austria	Czech Republic	Sweden	Poland	Spain	France	Germany	The Netherlands	UK	Overall
Smartphone	43%	29%	43%	27%	37%	9%	32%	34%	48%	34%
Laptop/ Desktops	53%	69%	52%	72%	59%	85%	61%	57%	42%	61%
Tablet	4%	2%	5%	1%	5%	5%	7%	8%	11%	5%

LAPTOPS/DESKTOPS ARE MORE POPULAR OVERALL

OMNI-CHANNEL IS THE NEW BLACK

Don't be fooled though - while mobile commerce is still smaller by comparison to desktop, it has a vital role to play.

Across Europe, growing proportions of consumers are regularly using their smartphones to browse products before buying online or in-store. For example, French shoppers may prefer to complete a purchase on their laptops, but the proportion using a smartphone to browse products almost doubled between 2015 and 2022.

For brands, providing a quality and consistent user experience across the whole sales ecosystem is key.

Our research found that consumers want the online shopping experience to be as seamless as possible, whether they are using one device to complete the transaction, or hopping between several.



The opportunity is to give shoppers the tools to continue browsing across devices, creating a streamlined interplay between them. This could mean encouraging users to log in so shopping baskets can be saved and preferences can be remembered, wherever they are browsing.

Dominic Harrison, Director of Global Trends at Foresight Factory

WHAT IS THEIR BROWSING BEHAVIOR?

In all the markets surveyed, 62% of online shoppers browse e-tailers at least twice per week. But the UK is an exception again, with 70% browsing twice every week – and that figure increases to 80% amongst 25-34 year-olds.

Whilst online shoppers find it easier and more convenient to shop this way, rather than browse in a physical shop, they also want to see better price comparison capabilities online too. This is to ensure they're definitely getting good value for money.

KEY PHRASES

WEBROOMING

[verb]

to make a purchase in a brick-and-mortar store having seen and researched the product online

SHOWROOMING

[verb]

to make a purchase online after seeing the product in-store



WHY ARE THEY BROWSING AND NOT BUYING?

In fact, in all markets, we found that younger people browse more frequently. And the vast majority of shoppers look around for the best deals. Sometimes, in a practice known as ‘showrooming’, a customer will visit a physical store to try a product and then search for a better price online – even while still in-store. This is often off-set by ‘webrooming’, a practice that gained popularity during the Covid-19 pandemic and entails shoppers researching products online but ultimately buying in-store.

However, browsing doesn’t always mean buying. For example, in Austria, browsing frequency is about the same as for most European countries, but 47% say they make only one online purchase per month.

A strong omni-channel strategy puts the technology and operations in place to meet customers where they are and where they want you to be, and also gives centralized data to determine the best ways to meet customers where they are and provide them with an excellent experience and service.

Dominic Harrison - Director of Global Trends at Foresight Factory

Click to find out [how Camper won new customers with their omni-channel retail strategy.](#)

The Camper logo, featuring the word "CAMPER" in white, bold, uppercase letters inside a red, curved rectangular shape.

DO CUSTOMER REVIEWS INFLUENCE BUYING BEHAVIOR?

When shoppers get close to purchasing, most see buyer reviews as important, and admit to being influenced by them.

IN SWEDEN,

84%

OF ONLINE SHOPPERS CHECK REVIEWS BEFORE MAKING A PURCHASE

WITH

99%

OF THOSE SAYING THEY WERE INFLUENCED BY THEM

MOST EUROPEAN COUNTRIES WERE SIMILAR IN THIS RESPECT



Always prompt customers to leave a review. Shoppers are wary of products or brands with no reviews and they are highly likely to be influenced by feedback from previous customers.

66%
I want to see more customer reviews and better product descriptions
Swedish online shopper - Female 25-34 years old



DO CUSTOMER REVIEWS INFLUENCE BUYING BEHAVIOR?

Shoppers in the Netherlands were the least influenced by reviews – 77% checked them, but only 17% said their purchasing behavior was very much influenced by what they read.

	Austria	Czech Republic	Sweden	Poland	Spain	France	Germany	The Netherlands	UK
Yes, very much	28%	21%	27%	31%	32%	28%	20%	17%	25%
Yes, to some extent	70%	77%	72%	69%	66%	70%	76%	79%	73%
No, not at all	2%	2%	1%	1%	2%	3%	4%	4%	2%



Actively and openly engaging with customers via their reviews can show that brands take feedback seriously. It is also an opportunity to make customers feel like active participants in the brand whose ideas and opinions are valued. Web platform 'Try Your Best' utilizes this model; it rewards consumers for feedback on things like product colorways and marketing imagery, gathering these in exchange for NFTs, brand coins, discounts, samples and access to events.

USE OFFERS TO CLOSE THE DEAL

Customers also need a nudge to complete their purchase and one of the most effective ways of doing this is by providing discounts and promotional offers. When shoppers talk about the frustrations they feel when shopping online, they mention the rules often attached to these discounts.

Our research confirms that discount hunting has become a mainstream feature of online shopper journeys. In fact, 24% say the main reason they shop online is to get better deals. Consumers are on the lookout for promotions, discount codes and cashback deals, and many are willing to share personal information to secure a bargain. For example, most European shoppers have signed up to newsletters or mailing lists to secure introductory or one-off discounts at checkout.

Discounts are usually reserved for purchases of a certain amount. I would like the minimum amount required to be eligible for a discount to be lowered.

French online shopper - Female, 55-64 years old



HOW DO SHOPPERS PREFER TO PAY?

When shopping online, people are looking for the most seamless and convenient ways to make payments. While options like debit and credit cards are already in use, people are seeking more sophisticated methods of digital payments like cryptocurrency – though this is still in nascent days. In the same breath, younger generations hesitant to use credit are turning to Buy Now, Pay Later (BNPL) to fund bigger purchases, utilizing platforms like Klarna, Divido, Ratepay and Clearpay.

Our research showed that the most popular method of payment throughout Europe is by credit or debit card. No surprises, there.

We discovered that several countries have payment quirks: in both Sweden and Germany around 20% of shoppers want to receive an invoice; in Poland 29% want to pay by bank transfer; and in the Czech Republic nearly 20% want the option of paying cash on delivery.



Make sure you offer all major credit and debit cards as payment options, and all digital wallets. Plus, if you're selling in Sweden, Germany, Poland or the Czech Republic, be prepared to provide for their payment quirks.

PAYMENT PREFERENCES BY COUNTRY (ALL AGE GROUPS):

	Austria	Czech Republic	Sweden	Poland	Spain	France	Germany	The Netherlands	UK
Credit / Debit Card	34%	54%	45%	30%	52%	65%	14%	37%	67%
Google Pay / Apple Pay	2%	5%	3%	4%	1%	1%	4%	3%	6%
Digital Wallet (Paypal or equivalent)	34%	12%	23%	23%	43%	33%	52%	34%	26%
Bank Transfer	12%	10%	5%	29%	0%	0%	8%	10%	0%
Invoice	17%	1%	23%	3%	0%	0%	20%	16%	0%
Cash on Delivery	3%	18%	1%	11%	4%	1%	2%	1%	1%

WHAT ELSE PAYS?

Digital wallets also remain a popular choice. In Germany, digital wallets, like PayPal or Apple Pay, are actually the top choice for payment. Here, over half the respondents prefer using it, while in Spain, payment by this method comes in a close second.

There are, however, differences by age of shoppers. In both Germany and the UK, 18-24 year-olds are more likely to prefer using Google or Apple Pay than over 55 year-olds (12% versus 2% in Germany and 16% versus 1% in the UK). Whilst in Sweden 46% of over 65 year-olds prefer to receive an invoice compared with 53% of 18-24 year-olds who prefer to use a credit or debit card to pay for their purchases.

In every market we surveyed, the vast majority of shoppers believe e-commerce websites generally offer a good choice of payment options. But on the other hand, if their preferred payment method is *not* offered, they are very likely to abandon their shopping cart.

German shoppers' longstanding preference for cash payment is gradually shifting. The pandemic energized the trend towards card-based and contactless payments, which account for a growing share of transactions. Online, digital wallets have become a leading means of payment: PayPal is the most popular online payment method, ahead of credit transfers and card-based payments (which can often incur additional fees and charges).

Dominic Harrison, Director of Global Trends
at Foresight Factory

IS IT TIME TO CONSIDER CRYPTO PAYMENTS?

Whilst it is still in its early stages, some buyers are starting to want to see cryptocurrency payment options – especially amongst younger shoppers.

*Payment options are limited...
some do not offer crypto, PayPal or Revolut.*

German online shopping - Female, 25-34 years old

Crypto is still relatively young – at a total level, only about 1 in 3 European consumers expect to see businesses accept it as a payment in the next 10 years. But our research also suggests an interest among younger consumers, particularly in Spain, where big brands such as Vueling Airlines have already started accepting such payments, and where a bill was proposed last year that would allow citizens to make mortgage payments with cryptocurrencies.

*Margot Peppers, Senior Trends Analyst
at Foresight Factory*

WHO ABANDONS THEIR SHOPPING CART – AND WHY?

Cart abandonment rates vary a lot across Europe. Shoppers in France and Sweden are the most likely to abandon their carts (France 44% and Sweden 42%).

On the other hand, shoppers in other countries said they never or rarely abandoned their carts: Czech Republic (75% of respondents), Poland (71%), UK (65%), and the Netherlands (61%) claim to go through with purchases.

As mentioned previously, most shoppers are likely to abandon their cart if not offered their preferred delivery option. Unexpected costs at check-out were another reason mentioned in many countries, although only in Spain and the Netherlands did this count higher than delivery costs.

But the main trigger for abandonment, almost without exception, is delivery being too expensive. We found this was the case both for countries where shoppers frequently abandon and where they don't, with 20-30% citing it as a reason in most of our markets, rising to 48% in the UK.

One of the most annoying things about online shopping is getting to checkout and having unexpected costs such as import tax added.

Netherlands online shopper, Female, 45-54 years old



WHAT OUR ONLINE SHOPPERS SAID

Read on to discover the results in more detail

- Cross-border shopping
- Product categories and spend
- Delivery and returns
- Sustainability
- The online shopping landscape
- What online shoppers said**





WHAT OUR SURVEY SAID

We trust that you found the findings and learnings from our report as enlightening as we did. There were far too many useful insights and nuggets of knowledge to put in a summary, but for us there were five real stand-out headlines. Take these onboard and your cross-border and online offering is sure to go from strength to strength.

1

GAIN A TRUSTED DELIVERY PARTNER, OR LOSE UP TO 58% OF POTENTIAL CUSTOMERS

Over half of the shoppers surveyed said knowing the identity of a trusted delivery partner was important to them.

2

YOUR SHOPPERS ARE LOOKING TO GO GREEN

Sustainability is very high on your customer's shopping lists, with many prepared to wait longer for a green delivery.

3

HAVING A SOCIAL SHOPPING OFFERING IS ESSENTIAL

Social is growing across the continent, with over half of all shoppers using social platforms to make a purchase.

4

ONLINE REVIEWS REALLY MATTER

More and more customers are turning to online reviews to validate their potential purchases. In Sweden alone 99% said reviews influenced their shopping behavior.

5

YOU NEED TO TURN BROWSING INTO BUYING

30% - 40% of shoppers surveyed frequently browse e-tailers twice or three times a week. It's also important to know that many browse and research before buying in a store.

NEXT STEPS

We've delivered a treasure trove of information – we hope our European Online Shopper Report 2022 has been useful.

You can learn more about specific markets by downloading the DHL Country Guides [here](#).

And if you'd like to find out more about how we can help you enter European markets or grow your e-commerce business internationally, reach out to a DHL eCommerce Solutions consultant at dhl.com/parcel-connect

