GEOPOST

THE NETHERLANDS REPORT

E-SHOPPER BAROMETER 2023

EXECUTIVE SUMMARY (1/2)

1. E-commerce in the Netherlands – slightly declining in 2023

- Like the European e-commerce downward trend, e-commerce in the Netherlands is less dynamic this year:
  - As many Dutch e-shoppers in 2023 as in 2022
  - But the share of regular e-shoppers is smaller: they represent 49% of the e-shoppers vs. 54% a year ago
  - Even if they received more parcels on average in the last month, they buy less categories online than last year, namely fashion, beauty & health care, grocery products, high-tech, and DVD/CD/Video games.
- Most Dutch regular e-shoppers find online shopping convenient and time-saving.

2. Dutch regular e-shoppers remain highly price sensitive

- Despite the high inflation, they remain at the same high level of price sensitivity as in 2022:
  - 61% of regulars claim that price is the most important factor when buying and 61% are looking for real good deals.
  - Despite being less bargain hunters than European e-shoppers, more of them are more paying attention to promotional events, which may be linked to inflation.
- Price-related online purchase drivers or dissuasive effects are steadily important as well, and their willingness to pay a premium for services that make their life easier is even increasing.

3. Usage of C2C platforms and e-shopping through social media are still very high in the Netherlands

- A growing share of Dutch regular e-shoppers claim they have increased their second-hand product purchases.
- 77% of regulars use C2C platforms and, this year, more are both buying and selling on these platforms.
- This year again, saving money is the main motivation to buy from individuals. Those who sell mention wanting to free up some space, earning money and sell products they are not using. In addition, reselling purpose at a higher price grows in importance this year.
- As observed last year, social networks continue to be widely used for shopping purposes by 7 out of 10 regular e-shoppers, and buying directly from social networks is a growing trend among regulars.

EXECUTIVE SUMMARY (2/2)

4. Same perception as 2022 of online purchase and delivery experiences, but in a positive trend over the last 2 years

- After the decrease observed in 2021, regular e-shoppers seem to be increasingly satisfied, particularly with their last delivery and the return process, both being perceived as easier than 2 years ago.
- Regulars who found their last online purchase difficult first speak about navigation issues on the website/app, then about hesitation between several products, a complex purchase process, and difficulties reaching the customer service.
- Knowing the delivery company remains very important to regulars. Avoiding companies they had a bad experience with has become the #1 reason to know.
- 24% of Dutch regular e-buyers returned their last purchase. Although the easiness improved compared to 2021, the return process is still perceived as difficult by most of them.
- Considering that regular e-shoppers grant more importance to the detailed description of the product compared to 2022, it is likely that they pay more attention to the product details online, wishing to be sure about the product bought to avoid returning parcels.
- In terms of delivery places, regulars increasingly wish to have several options available, and they use more diverse delivery places:
  - Home delivery remains by far the #1, ahead of parcel shops. Yet, parcel shops is more used than 2 years ago. Moreover, more regulars receive their parcel in a safe place and a parcel lockers in 2023.

5. A stable situation as well among the online heavy buyers "The Aficionados"

- This specific group of e-shoppers still buy many products categories online (more than 8) and received a high number of parcels in the last month – 8.5 parcels - which is higher than the European average.
- They are as price sensitive as last year and at a similar level compared to regulars. However, having price comparison tool is gaining in importance for them when buying online.
- In trend, Aficionados' perception towards their last delivery and overall purchase experience is better than last year:
  - 71% of Aficionados claim their last delivery was easy
  - 71% consider their last online purchase experience as excellent or very good
- There is still room for improvement in terms of online purchase and parcel return perceived easiness.

METHODOLOGY

Sample

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

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

Key targets

- **Regular e-shoppers:**

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

- **Aficionados:**

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

METHODOLOGY

Data collection

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

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

Fieldwork

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

LEGEND FOR EVOLUTIONS

Significant differences

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

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

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

No arrows if no significant difference.

HOW IS E-COMMERCE EVOLVING IN THE CURRENT CONTEXT?

THROUGH REGULAR E-SHOPPERS

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

HOW IS E-COMMERCE EVOLVING IN THE CURRENT CONTEXT?

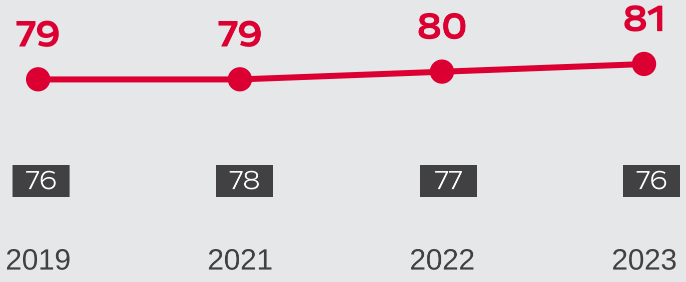
- A steady share of e-shoppers but less regular e-shoppers, who buy fewer categories online
- Stable level of online purchases among Aficionados, the heaviest e-buyers
- More regular e-shoppers are both buying and selling on C2C platforms

1.

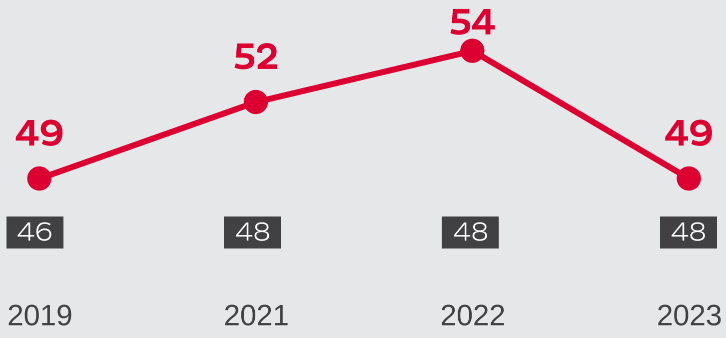
TOTAL E-SHOPPERS AND REGULAR E-SHOPPERS

E-COMMERCE KEY TRENDS IN SCORECARD

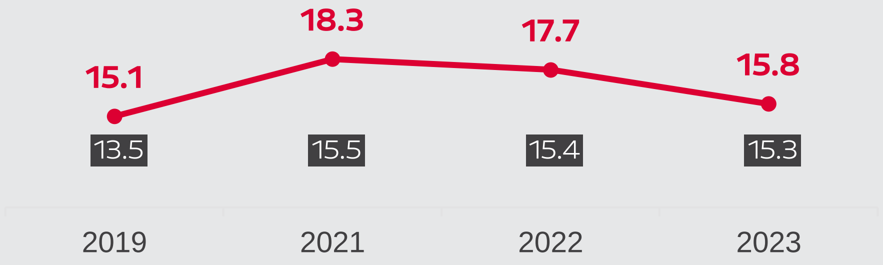
The share of e-shoppers is stable in the Netherlands. That of regular e-shoppers, on the other hand, has eroded this year after the mild increase over the last 2 years, although the number of parcels received in the last month continue to grow.



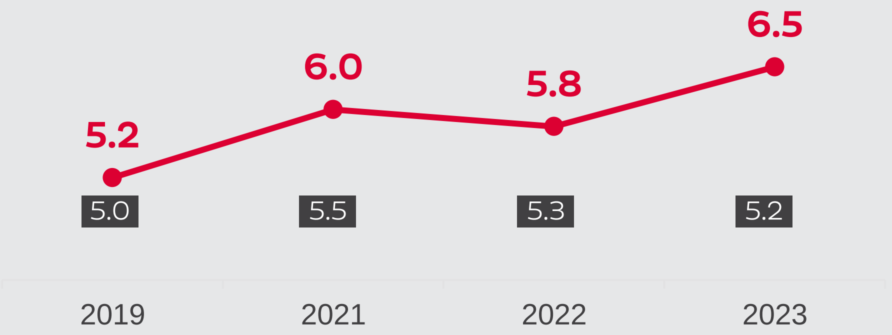
% – Share of e-shoppers among total population



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



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



Number of parcels received last month by regular e-shoppers

No significance test on this slide

XX European average

TOTAL E-SHOPPERS

E-COMMERCE KEY TRENDS

The share of e-shoppers is stable in the Netherlands. After the increase in the number of regular e-shoppers over the last 2 years, they are fewer in 2023, back to the pre-covid period level.

Share of e-shoppers among total population

81%

76%
European average

of all Dutch people are e-shoppers

2022
80%

2021
79%

Share of regular e-shoppers among total e-shoppers

49% ▼

48%
European average

of all e-shoppers are regular e-shoppers

2022
54%

2021
52%

KEY FACTS ABOUT REGULAR E-SHOPPERS

Regular e-shoppers remain a key target for e-tailers, accounting for most online transactions. Despite being fewer in 2023, they received more parcels in the last month on average.

87% 86%

of all online purchases made by regular e-shoppers

90% 2022

90% 2021

15.8% 15.3%

Average share of online shopping
(in total shopping – average of all categories)

6.5 +0.7 ▲ 5.2

number of parcels received last month

22% 27%

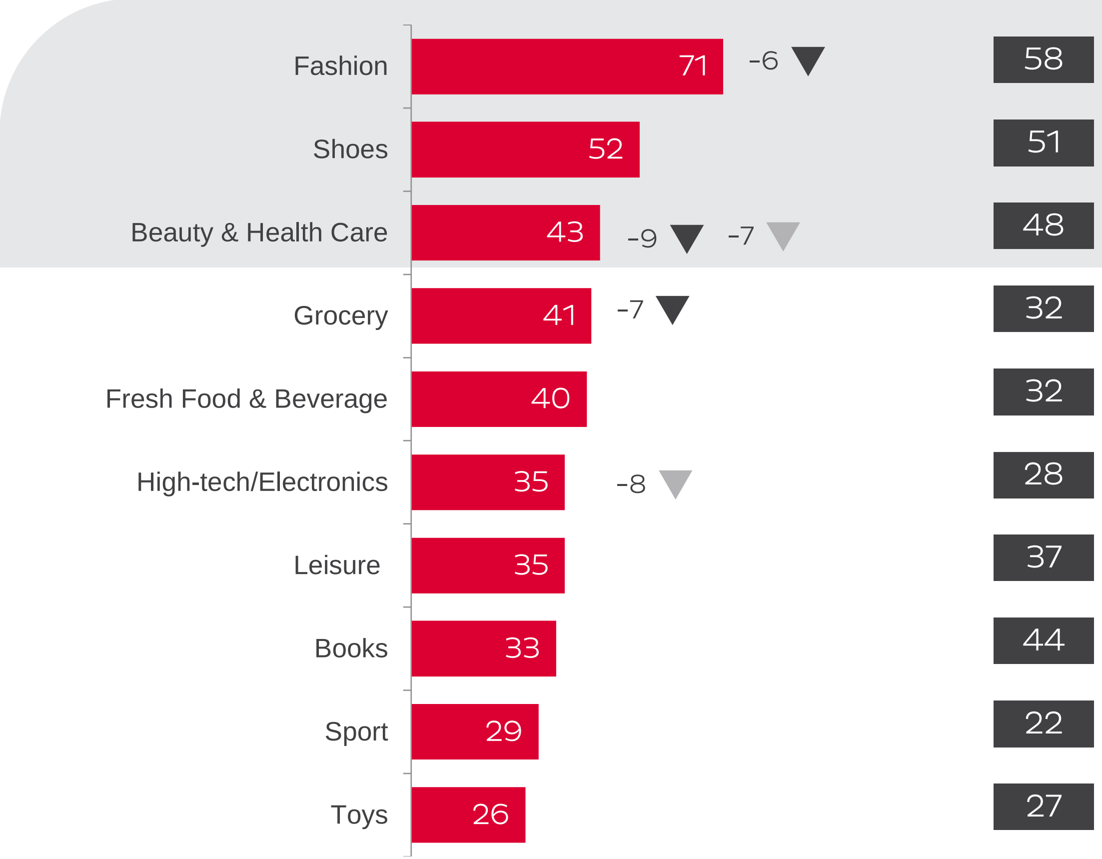
made impulse purchases
(last purchase)

XX European average

REGULAR E-SHOPPERS POPULAR CATEGORIES

Dutch regular e-shoppers buy less categories online than last year, especially driven by the categories of fashion, beauty & health care, grocery products, high-tech, and DVD/CD/Video games.

% – TOP 10 types of goods purchased online since January



5.9 -0.5 ▼ 5.9

categories bought on average

Biggest evolutions vs. 2022 (apart from top 10)

15% DVD CD Video Games -6 ▼

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

XX European average

REGULAR E-SHOPPERS' IMAGE OF E-SHOPPING

Even if they buy less product categories online this year, their perception of e-shopping remains stable, with more than half of them find e-shopping convenient.

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

58% 66%

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

57% 60%

"Shopping online allows me saves time" - %T2B

69% +9 ▲ 76%

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

54% 55%

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

XX European average

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C2C PLATFORM USAGE & SOCIAL MEDIA SHOPPING

Almost 8 in 10 Dutch regular e-shoppers are using C2C platforms, and more are both buying and selling products this year.

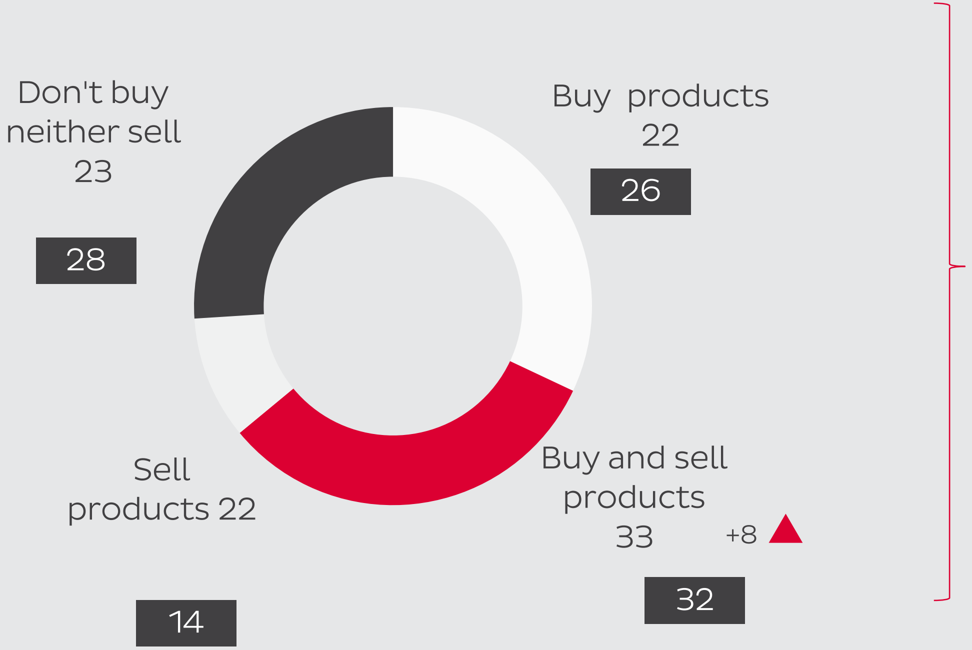
As in 2022, saving money represents their top motivation to buy from individuals.
Those who sell first want to free up some space, and also earn money and sell products they are not using. Reselling at a higher price is a growing trend.

REGULAR E-SHOPPERS

ONLINE SHOPPING BETWEEN INDIVIDUALS

More Dutch regular e-shoppers are buying and selling products via this new e-commerce solution.

% - Buying and selling on second-hand platforms



77%

buy or sell products

72%

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

Question added in 2022, no comparison vs. 2021

XX European average

REGULAR E-SHOPPERS – FOCUS ON C2C USERS

C2C USERS PROFILE

Female

51% 56%

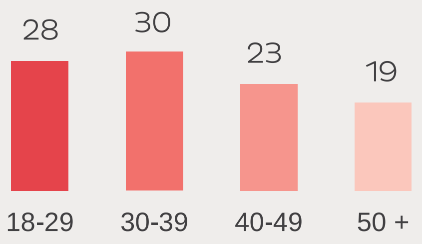
Income

48% 45%

Upper

Age

38.6 y.o 40.5



Marital status

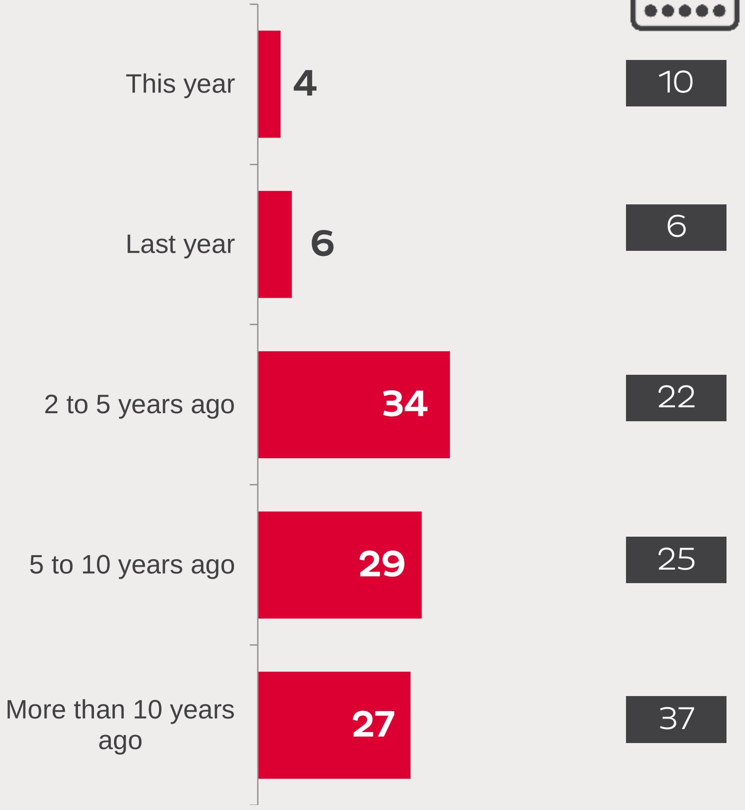
48%	Married	44%
23%	Single	31%
22%	Cohabitation	17%
4%	Divorced	6%

City size

91% 86%

Urban

% – Started purchasing online ...



XX European average

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

Significance test vs. 2022 only

N=382
RS1; RS2; RS2RECAP; RSX; S2; C1

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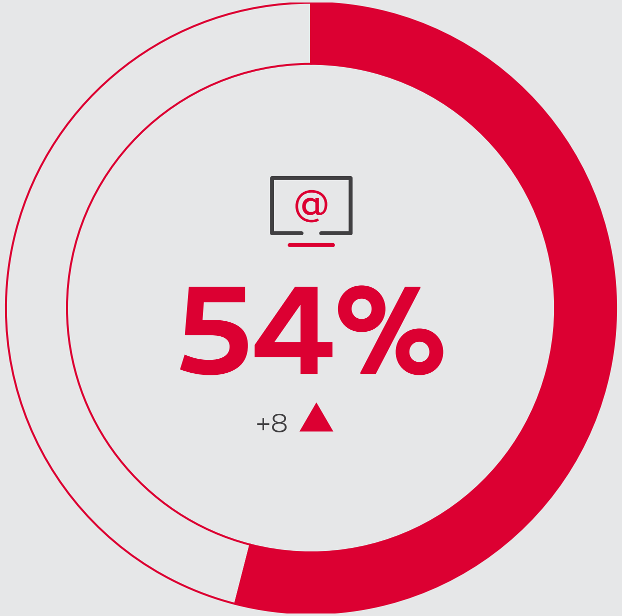
BUYING PRODUCTS ON C2C PLATFORMS

A higher share of Dutch regulars claim they buy more second-hand products these days, in line with the growing number of C2C platforms buyers in the Netherlands.



54%

+8 ▲

…**buy** products on C2C platforms

58%

40% +9 ▲

(% agree & strongly agree)

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

35%

Frequency of purchase

(n=271)

44% at least once a month	44%
28% once every 2 or 3 months	29%
28% less often	27%

11.8 times per year on average 12.1

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

Question added in 2022, no comparison vs. 2021

XX European average

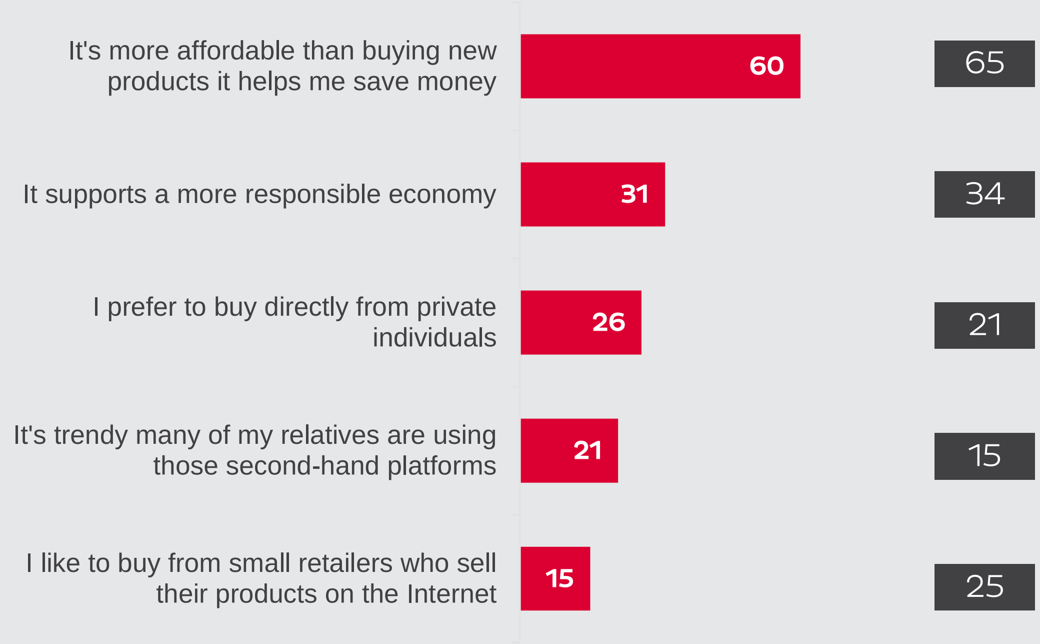
REGULAR E-SHOPPERS

BUYING PRODUCTS ON C2C PLATFORMS

Saving money remains the #1 reason to purchase on C2C platforms, supporting a more responsible economy comes after. Hand delivery are more favored this year by Dutch regulars, and more compared to Europe.

Reasons of purchase – %

(n=271)



Choice of delivery

41%

Carrier chosen by the seller

47%

46%

Carrier proposed by the website

49%

49%

Hand delivery

+11 ▲

32%

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

Question added in 2022, no comparison vs. 2021

XX European average

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SELLING PRODUCTS ON C2C PLATFORMS

More than 1 in 2 regular e-shoppers are selling on C2C platforms, it’s more than their European counterparts. They first want to free up space, but also earn money and get rid of products they rarely use. Interestingly, reselling purpose at a higher price grows in importance this year.

46%

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

Reasons of selling – %

(n=274)

XX European average

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

Question added in 2022, no comparison vs. 2021

REGULAR E-SHOPPERS – FOCUS ON C2C USERS

ONLINE PURCHASE HABITS & ATTITUDES

As most regulars are using C2C platforms, users of these platforms have similar purchase habits and attitudes, and they buy less categories online as well.

6.0 -0.6 ▼ 6.3

Different types of goods bought since January on average

Top 7 Categories

1. Fashion **70%**	-7 ▼	59%
2. Shoes **52%**		53%
3. Beauty & Health care **43%**	-11 ▼	48%
4. High-tech/Electronics **38%**		30%
5. Grocery **38%**	-10 ▼	33%
6. Fresh Food & Beverage **37%**		32%
7. Leisure **36%**		39%

Attitudes specificities vs. regular e-shoppers

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

No difference vs. regulars

+1 vs. regular e-shoppers
-1 vs. 2022

54 45

Annual number of purchases

/!\ No significance test on median

15.5% 15.7%

Average share of online shopping

(on total shopping – average of all categories)

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

XX European average

Significance test vs. 2022 only

GEOPOST

N=584
A1;A5;SC2;G11

REGULAR E-SHOPPERS - FOCUS ON C2C USERS

DELIVERY PLACES & PREFERENCES

Home delivery remains the #1 preference for C2C users, yet they diversify the places they use. In terms of delivery services, like to regulars, it is particularly important to them to select and know the day and 1-hour window of their delivery.

Top 5 - Usual delivery places

71%	29%	16%	14%	14%
Home	Parcel shop	Neighbour's home	A "safe place"	Post office
72%	26%	8%	11%	17%

1.9 +0.2▲

Delivery places on average

2

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

/!\ No significance test on index

136	135	127	126	119
To select the day and exact 1-hour window/timeslot in advance of your delivery	To know the exact 1-hour window/timeslot of your delivery	To be delivered where I am located	Next day delivery	Several delivery options
RANKING AMONG REGULAR E-SHOPPERS				
#1	#2	#3	#4	#6

73%

...consider it important to know the delivery company

73%

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

XX European average

Significance test vs. 2022 only

N=584
C14;D15;C16new

SHOPPING THROUGH SOCIAL MEDIA (AMONG SOCIAL MEDIA USERS)

Shopping through social networks is a common practice among Dutch regulars, and they increasingly look for products on social networks and buy directly from these websites/apps.

Shopping activities done on social networks –%

(Among social media users, n=470)

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

70%

53% ...shop directly from social media

+7 ▲

48%

1.8 Activities on average

1.8

Question added in 2022, no comparison vs. 2021

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

XX European average

TO WHAT EXTENT HAS INFLATION IMPACTED E-SHOPPERS?

- Despite the high inflation, regular e-shoppers' price sensitivity remains at the same high level
- Yet, a growing share of Dutch regulars are looking forward to big promotional events
- Similar findings among Aficionados

2.

REGULAR E-SHOPPERS

ATTITUDE TOWARDS PRICE

Dutch regular e-shoppers remain highly price sensitive overall, but at a steady level. They are still less bargain hunters than their European peers, but more are paying attention to promotional events than in 2022.

55% 65%

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

61% 62%

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

61% 69%

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

48% +8 ▲ 53%

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

33% +7 ▲ 34%

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

41% 39%

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

XX European average

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

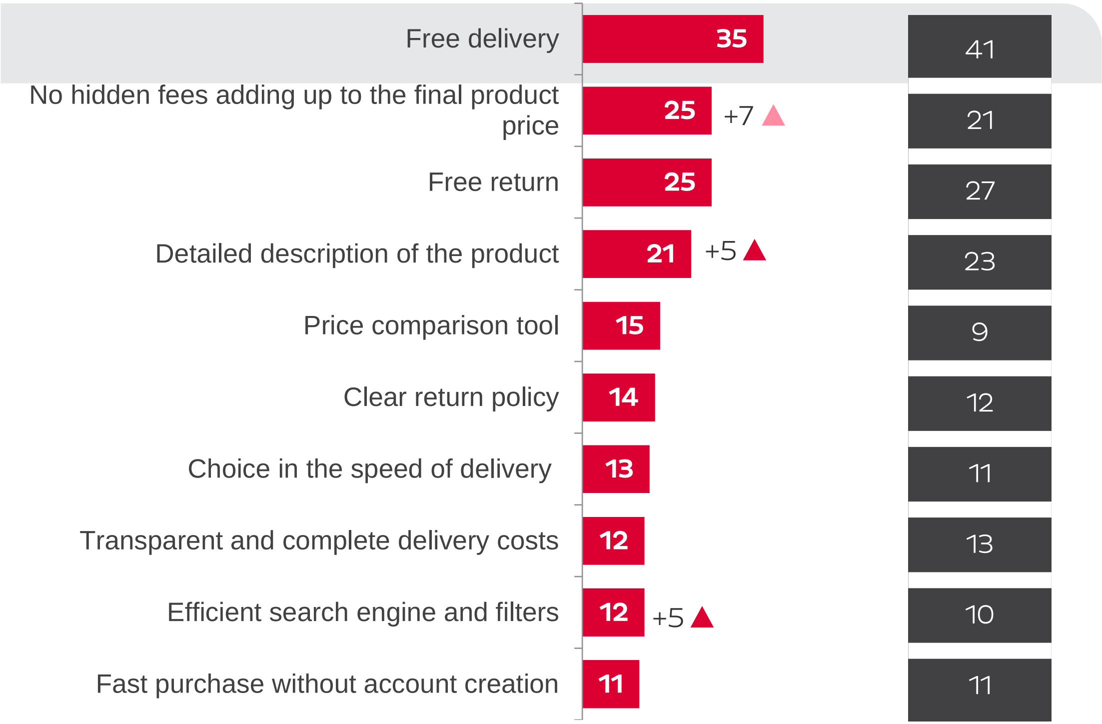
REGULAR E-SHOPPERS

ONLINE PURCHASE DRIVERS

Among drivers of online purchase, the weight of price-related criteria remain as important as last year. Having detailed product descriptions is gaining in importance, likely indicating regulars’ wish to make sure of their purchase decision and avoid returning their parcel.

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

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



Biggest evolutions vs. 2022 (apart from TOP10)

8% Ability to be told the exact 1-hour time slot of when your parcel will arrive -5 ▼

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

XX European average

REGULAR E-SHOPPERS

DISSUASIVE EFFECTS

Bad opinions on social media stays the 1st barrier that would prevent Dutch regulars from buying online. No increase for price-related barriers, but more expectations towards a smooth navigation on the website/app.

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

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

Biggest evolutions vs. 2022 (apart from TOP10)

No other evolution

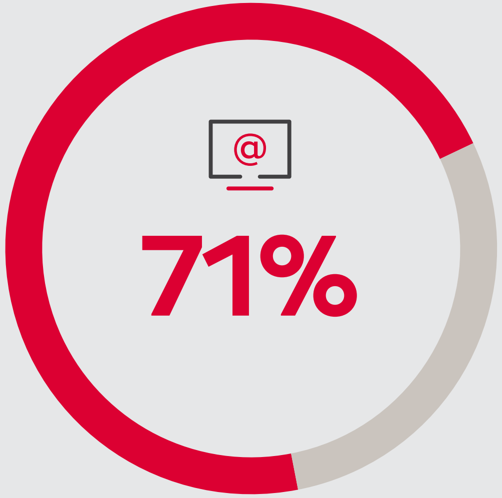
B2a – Among the selected criteria which one prevents you the most from buying online? And the second, the third?
Rq: TOP 3 ranking on all answers given

XX European average

REGULAR E-SHOPPERS

FOREIGN VS. LOCAL

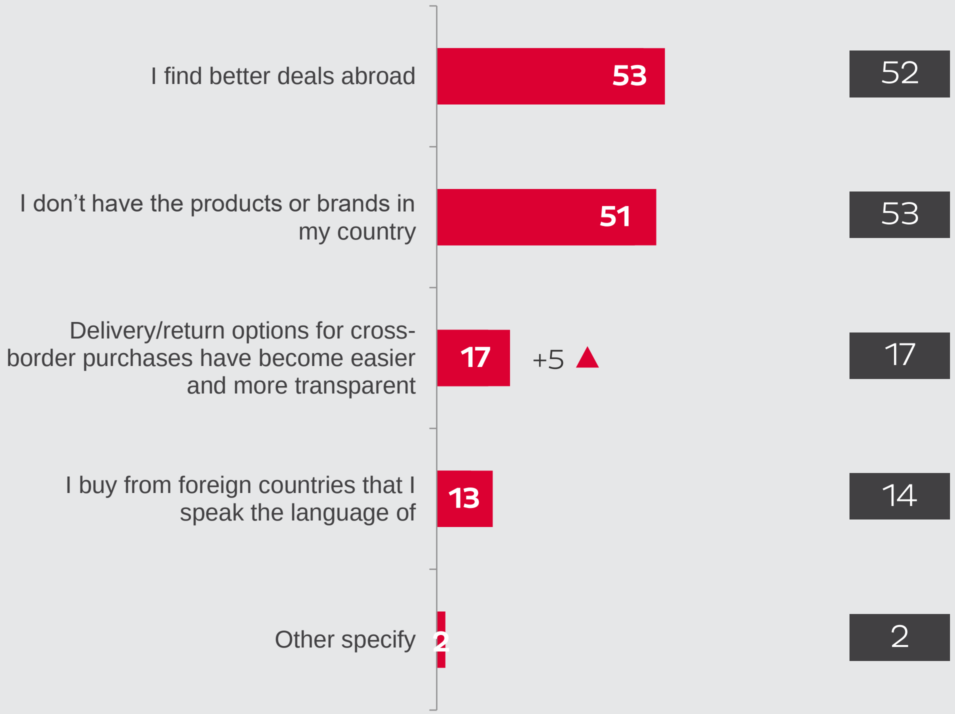
Buying on foreign websites remains very common in the Netherlands, even more than in Europe. Finding better deals and products unavailable locally stay by far the top drivers, but easier delivery/return options is a growing reason.



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

58%

Reasons to make purchases from foreign websites % (n=356)



I find better deals abroad	53	52
I don't have the products or brands in my country	51	53
Delivery/return options for cross-border purchases have become easier and more transparent	17 +5 ▲	17
I buy from foreign countries that I speak the language of	13	14
Other specify	2	2

XX European average

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

REGULAR E-SHOPPERS

PURCHASES FROM FOREIGN COUNTRIES

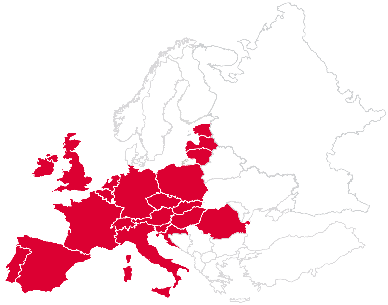
Top 3 favored countries for abroad e-shopping is steady in 2023, China at the top of the ranking, followed by Dutch neighbouring countries Germany and Belgium, yet less regulars are buying from German websites/apps over the last 2 years.

Top 3 most common foreign countries for buying online

1	China	51%		48%
2	Germany	33%	-10▼	28%
3	Belgium	24%		8%

62% in other parts of the world

65%



74% in Europe

73%

46% from neighbouring countries

-9▼

45%

C7 – From which countries? Base: People that have already bought online from foreign websites (n=356)
Rq: We define a foreign website as a website having a different domain name than your local one and/or a website being in a foreign language.

XX European average

ZOOM ON THE PRICE SENSITIVE E-BUYERS

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

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

N=84 (weighted)

REGULAR PRICE SENSITIVE E-BUYERS PROFILE

Female

57% 61%

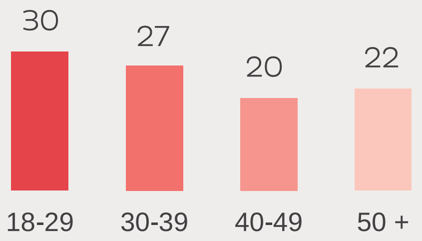
Income

47% 60%

Lower

Age

39.1 y.o 41.1



Marital status

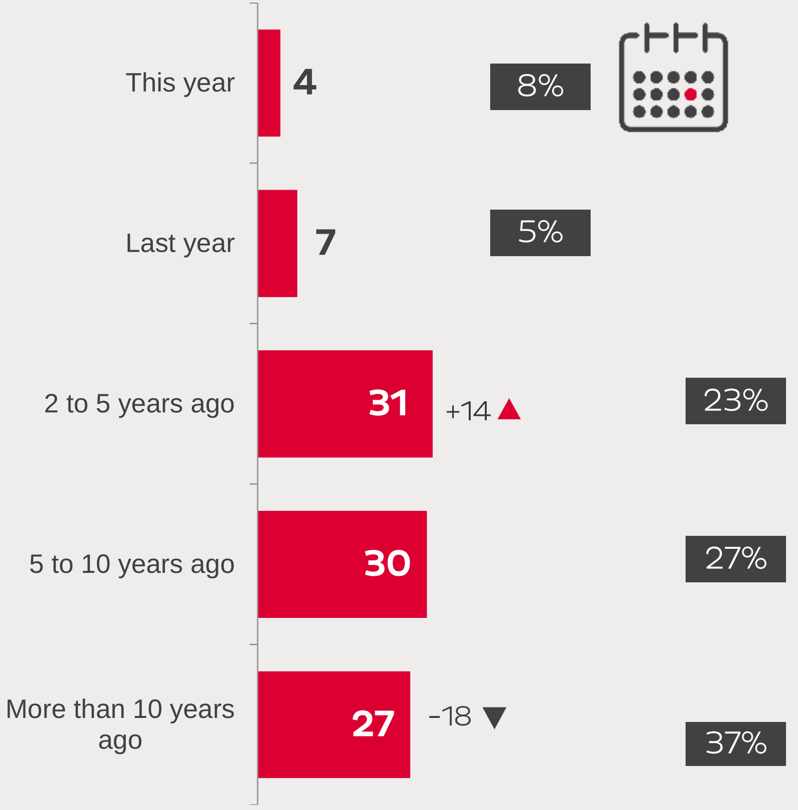
24%	Single	33%
48%	Married	42%
19%	Cohabitation	15%
5%	Divorced	7%

City size

92% 85%

Urban

% – Started purchasing online …



XX European average

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate
Significance test vs. 2022 only

RS1; RS2; RS2RECAP; RSX; S2; C1

REGULAR E-SHOPPERS – REGULAR PRICE SENSITIVE

ONLINE PURCHASE HABITS & ATTITUDES

Unsurprisingly, discounts and good deals are more important to price sensitive e-buyers, and more than last year. This target is likely to have a perception of themselves being more “digital,” and interestingly, they buy more often online than the average regulars.

5.6 5.9

Different types of goods bought since January on average

+11 vs. regular e-shoppers
+17 vs. 2022

64 39

Annual number of purchases

/!\ No significance test on median

Top 7 Categories

1. Fashion **59%** -17 ▼ ▬ (71)	59%
2. Grocery **45%**	32%
3. Shoes **45%**	51%
4. Fresh Food & Beverage **43%**	31%
5. Beauty & Health Care **41%**	50%
6. Leisure **38%**	36%
7. Sport **31%**	19%

14.1% 15.3%

Average share of online shopping

(on total shopping – average of all categories)

Attitudes specificities vs. regular e-shoppers

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

Positive ✚

85% There are products that I would never buy online (65) +13 ▲	73%
79% I am always on the lookout for a really good deal (61)	86%
76% I am always concerned about my safety and my security (61)	68%
69% I can shop for nearly 100% of the products/services I need online (54)	64%
65% I look forward to big discount events, online or offline (Black Friday, seasonal sales…) (48) +19 ▲	67%
69% To me it is important to always be reachable wherever I am (51)	56%
62% I really like the idea of technology that 'knows' me and can make recommendations and take actions based on my wants and needs (47)	53%
57% I use a lot of collaborative / shared / community services (such as car sharing room sharing ride sharing…) (41)	40%

XX European average

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate
Significance test vs. 2022 only

A1;A5;SC2;G11

REGULAR E-SHOPPERS - REGULAR PRICE SENSITIVE

DELIVERY PLACES & PREFERENCES

Delivery at home is the first delivery place used by price-sensitive e-buyers as well, and knowing the delivery company is equally important compared to regular e-shoppers.

Top 5 - Usual delivery places

73%	**21%**	**15%**	**15%**	**12%**
Home	Parcel shop	A "safe place"	Post office	Neighbour's home
79%	24%	10%	17%	7%

1.8

Delivery places on average

1.9

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

/!\ No significance test on index

137	**136**	**133**	**131**	**118**
To select the day and exact 1-hour window/timeslot in advance of your delivery	To be delivered where I am located	To know the exact 1-hour window/timeslot of your delivery	Real time information	Several delivery options
RANKING AMONG REGULAR E-SHOPPERS				
#1	#3	#2	#5	#6

73%

...consider it important to know the delivery company

69%

XX European average

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

Significance test vs. 2022 only

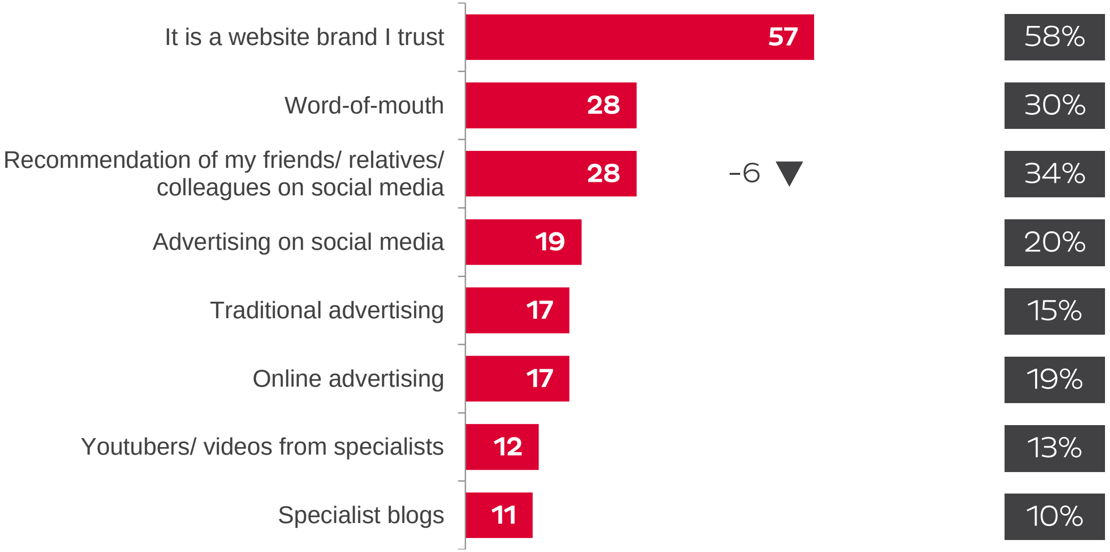
C14;D15;C16new

REGULAR E-SHOPPERS

REVIEWS AND RECOMMENDATIONS

Regular e-shoppers still choose first the websites they trust, but they also consider their relatives' recommendations and word-of-mouth. Sharing/publishing a post-purchase feedback is less common for them compared to Europe.

Drivers when choosing a website/ an app-%



1.9 2.0

Average number of influencers

59%

Share or publish a feedback after purchasing 67%

51%

NET Social Media and influencers 55%

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

XX European average

GEOPOST

WHAT ARE THE MAIN TRENDS OF DELIVERY?

- Dutch regular e-shoppers are using more and more delivery places
- Logically, having several delivery options is a growing expectation. Yet, knowing & choosing a precise 1-hour slot remain the main delivery preference.
- Their perception of their last delivery and return has improved over the last 2 years

3.

REGULAR E-SHOPPERS

TOP DELIVERY PREFERENCES

Having several delivery options is strongly going up in Dutch regulars' delivery preferences ranking.
And being delivered where they are located is much higher in the ranking in the Netherlands than in Europe.

Delivery preferences (importance index – average interest = 100)

138	137	130	126	118	118	117
Select day and one-hour window delivery in advance	Know the exact 1-hour window of the delivery	To be delivered where I am located	Next day delivery	Real time information	Several delivery options	To be delivered in a selectable 2hour window in the afternoon
134	123	87	125	152	143	94

RANKING IN 2022

#1	#2	#3	#4	#5	#10 +4	#6 -1

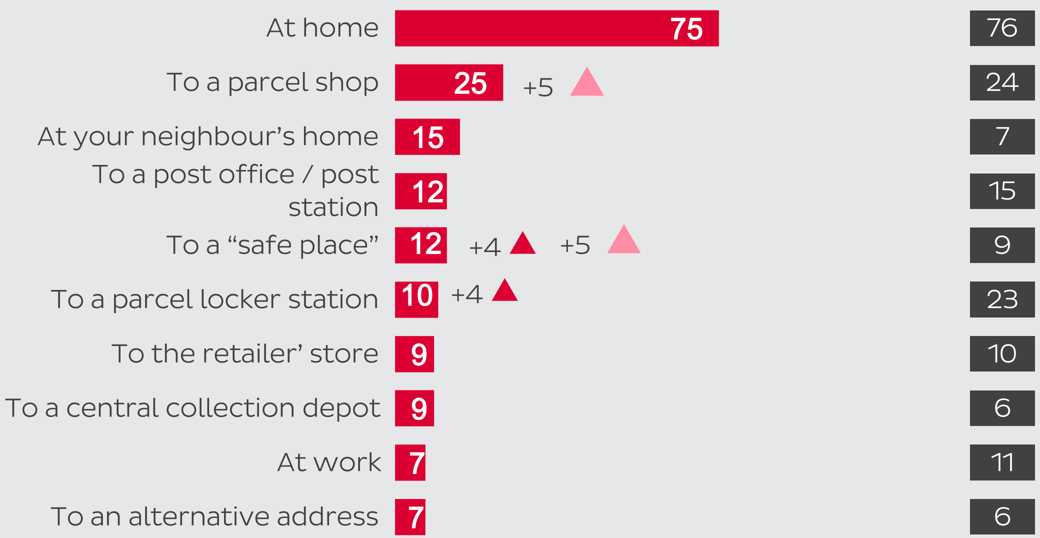
C16new – What delivery options are important to you when choosing an online retailer?
Please select one option that is THE MOST IMPORTANT, and another one that is the LEAST IMPORTANT to you.
Rq: Maxdiff module – the items are displayed 4 at a time on 8 different screens, each time the respondent selects the most and least important

XX European average

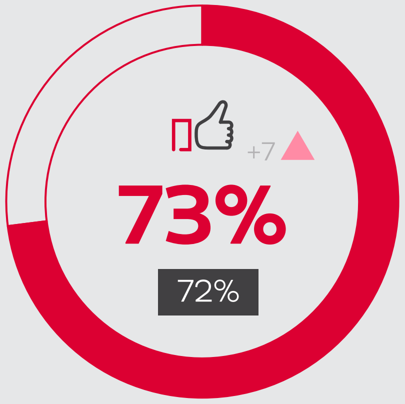
DELIVERY PREFERENCES

In line with increasing preference on having several delivery options, regular e-shoppers are using more delivery places in 2023, mainly driven by parcel shop (vs. 2021), safe place and parcel lockers. Meanwhile, their delivery experience is better perceived compared to 2021.

Usual delivery places-%



1.8 +0.2 ▲ +0.2 ▲ 1.9 Delivery places on average



... found delivery easy/effortless

+9 ▲ +12 ▲

49% 51%

Usually use more than one delivery place

+7 ▲

36% 44%

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

XX European average

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

REGULAR E-SHOPPERS – FOCUS ON OOH USERS

OUT OF HOME USERS PROFILE

Female

49% 56%

Income

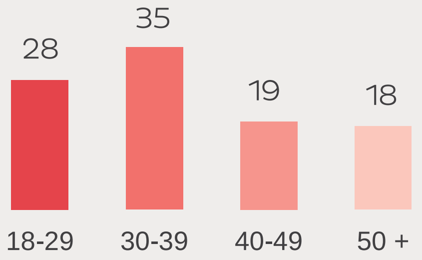
39% 52%

Lower

Age

37.2 y.o ▬ (40.1) 41.2

✚(27)



Marital status

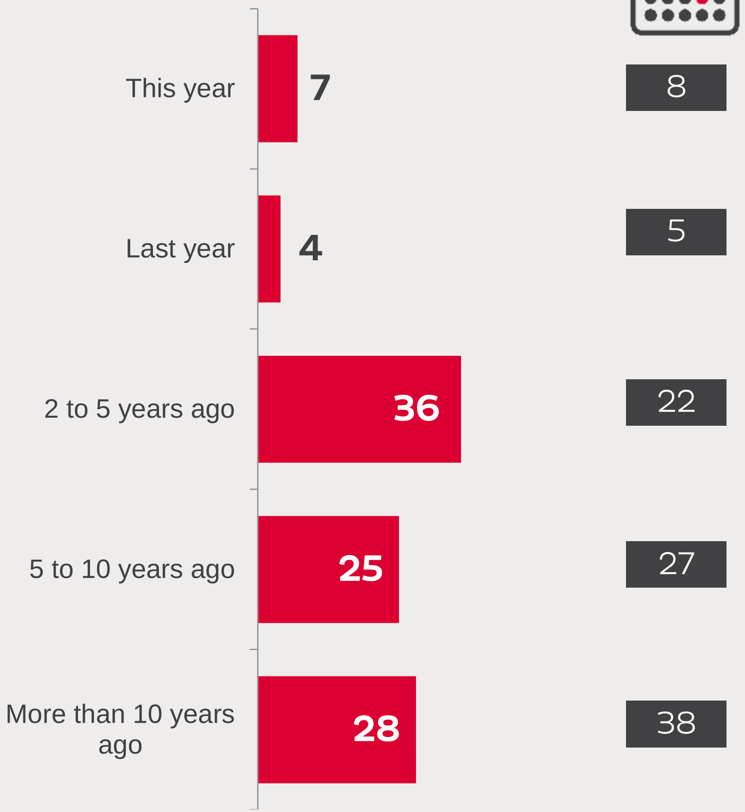
52%	Married	45%
23%	Single	31%
17% -10▼	Cohabitation	16%
4%	Divorced	6%

City size

92% 88%

Urban

% – Started purchasing online …



XX European average

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

Significance test vs. 2022 only

N=200
RS1; RS2; RS2RECAP; RSX; S2; C1

GEOPOST

REGULAR E-SHOPPERS – FOCUS ON OOH USERS

ONLINE PURCHASE HABITS & ATTITUDES

OOH users buy as many product categories as regulars overall. In terms of attitudes, more claim they manage to do all they want despite their busy life, and that they would rather have more time than money: OOH options are probably adapted to their busy lifestyle.

6.1 6.4

Different types of goods bought since January on average

Top 7 Categories

1. Fashion **68%**	59%
2. Shoes **48%**	53%
3. Grocery **42%**	32%
4. Beauty & Health care **41%** -15 ▼	51%
5. Fresh Food & Beverage **38%**	32%
6. Books **37%**	47%
7. Leisure **36%**	38%

+7 vs. regular e-shoppers

-5 vs. 2022

60 44

Annual number of purchases

/!\ No significance test on median

15.6% 15.9%

Average share of online shopping

(on total shopping – average of all categories)

Attitudes specificities vs. regular e-shoppers

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

Positive ✚

69% It is important to indulge myself on a regular basis (57) +14 ▲	61%
64% I manage to do all that I want despite a busy life (51)	50%
62% I actively look for products and services that help me have a healthy lifestyle (50)	58%
59% I would rather have more time than more money (47) +16 ▲	43%
52% I'm willing to pay a premium for products and services that are respectful of the environment (41)	40%
54% The most important thing about a brand is that it gives good value for the money (43) +12 ▲	49%
54% I feel it is important to be an active part of the wider community (42)	47%
49% I am almost always among the first to try new ways of shopping or new shopping experiences (38)	37%

XX European average

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

N=179
A1;A5;SC2;G11

GEOPOST

REGULAR E-SHOPPERS - FOCUS ON OOH USERS

DELIVERY PLACES & PREFERENCES

They use more delivery places than regulars, and parcel shops is their top one delivery method. In terms of preferences, they first want to be offered several delivery options.

Top 5 – Usual delivery places

71%	**59%**	**27%**	**26%**	**19%**
+ (25)	− (75)	+ (10)	+ (9)	
Parcel shop	Home	Locker stations	Retailer store (click & collect)	Neighbour's home
54%	65%	53%	23%	8%

2.6 + (1.8)

Delivery places on average

2.6

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

/!\ No significance test on index

148	**132**	**130**	**121**	**113**
Several delivery options	Select day and 1-hour window in advance for delivery	Know the exact 1-hour window/timeslot of delivery	Next day delivery	To be delivered where I am located
RANKING AMONG REGULAR E-SHOPPERS				
#6	#1	#2	#4	#3

74%

...consider it important to know the delivery company

73%

XX European average

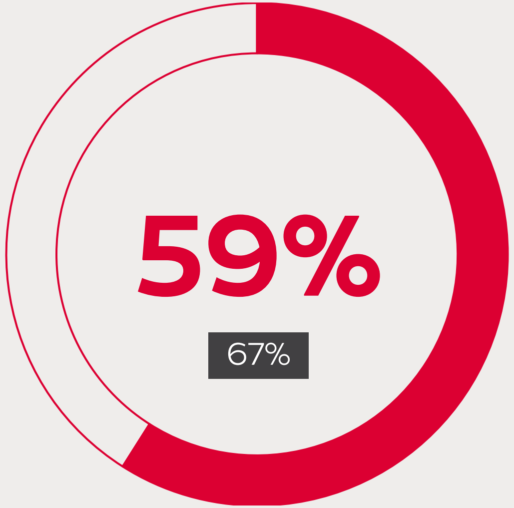
+ − vs. regular e-shoppers (xx) at 95% confidence rate
Significance test vs. 2022 only

N=200
C14;D15;C16new

REGULAR E-SHOPPERS

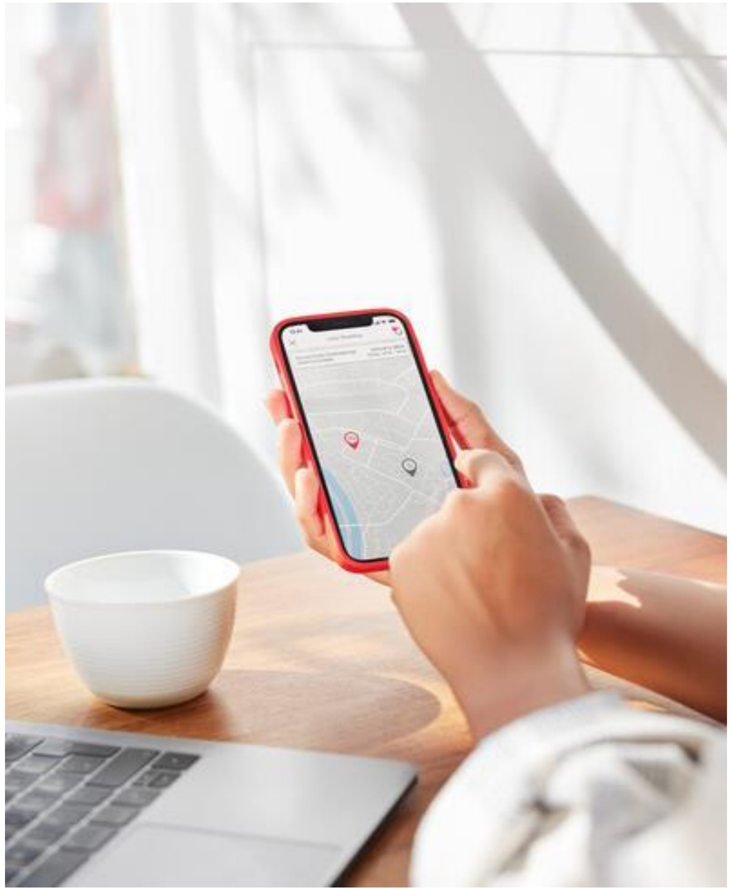
IMPORTANCE OF DELIVERY SERVICES

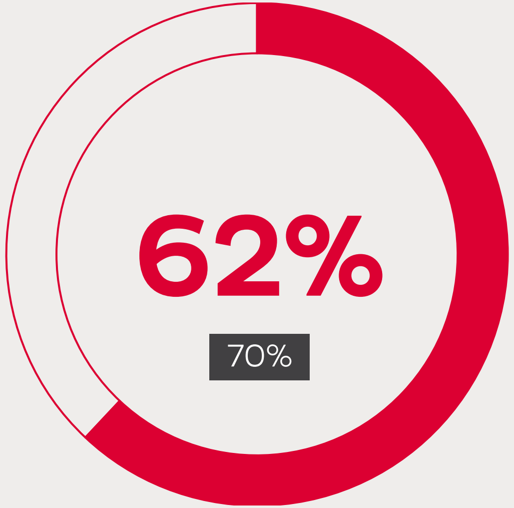
Being informed about the exact 1-hour delivery timeslot and being able to choose the specific day/time of delivery remain important to 6 in 10 Dutch regulars when choosing an e-tailer, it’s still less compared to their European peers.


59%

67%

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




62%

70%

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

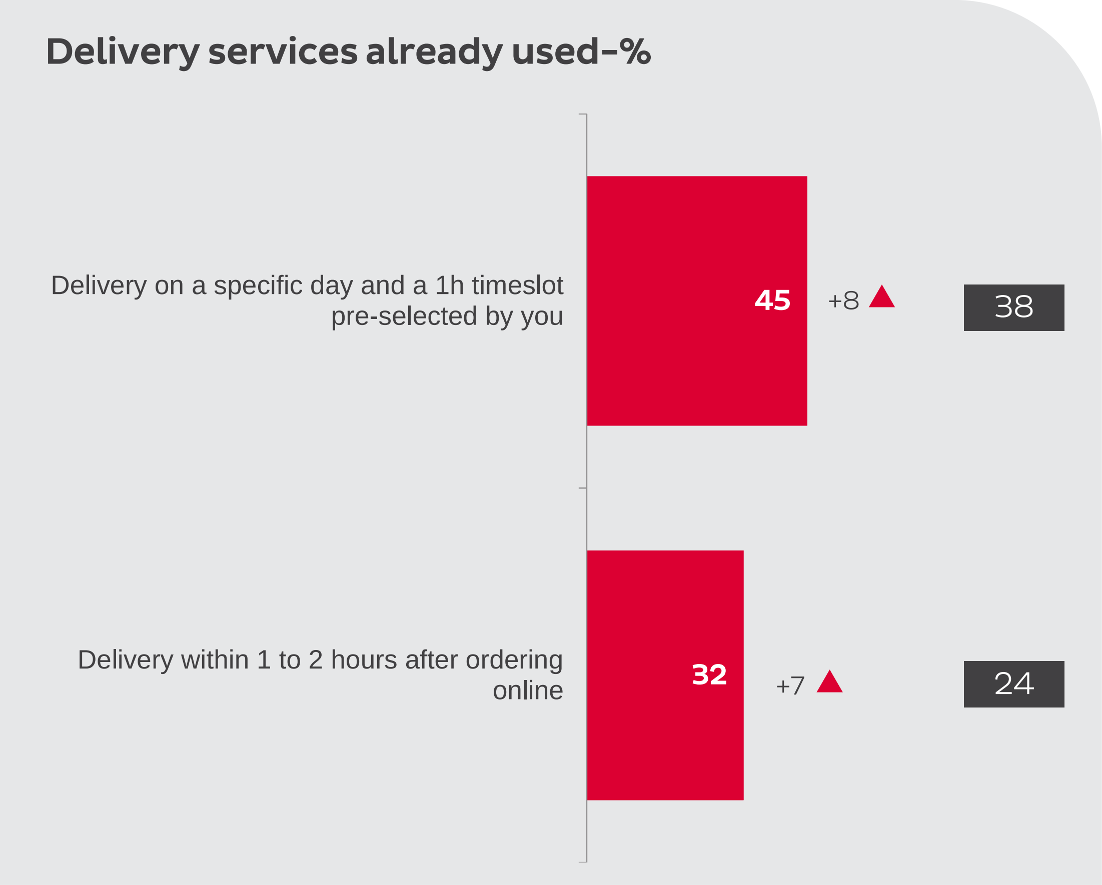
C17. Would knowing the exact 1-hour window/timeslot of your delivery make you more likely to purchase from a website/retailer/app?
C17bis. Would the ability to select the day and exact 1-hour window/timeslot in advance of your delivery make you more likely to purchase from a website/retailer/app?

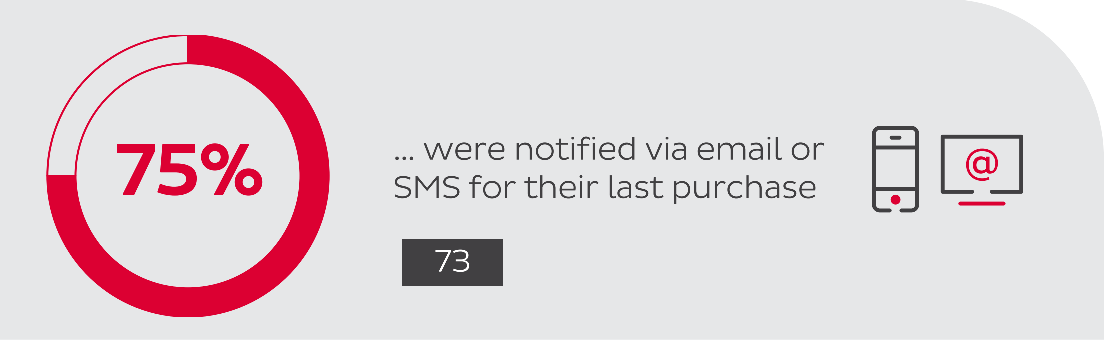
XX European average

REGULAR E-SHOPPERS

USE OF DELIVERY SERVICES

A growing share of regulars are using quick delivery - 1 or 2 hours after the order - and delivery on a pre-selected day / 1h timeslot.





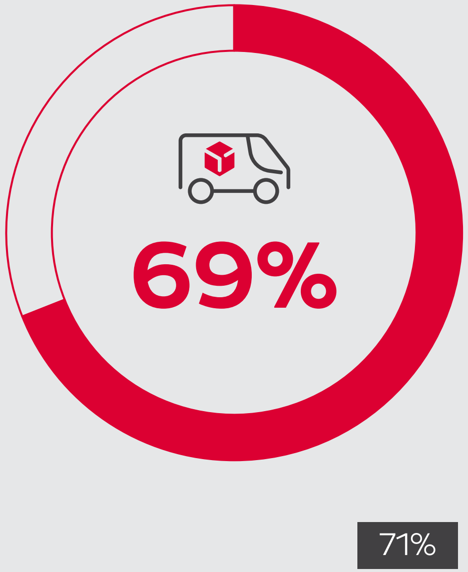
G1 – Have you already used the following delivery services?
D10. On the day of delivery, did you receive an email or SMS notification to indicate you the approximate time your parcel will arrive?

XX European average

REGULAR E-SHOPPERS

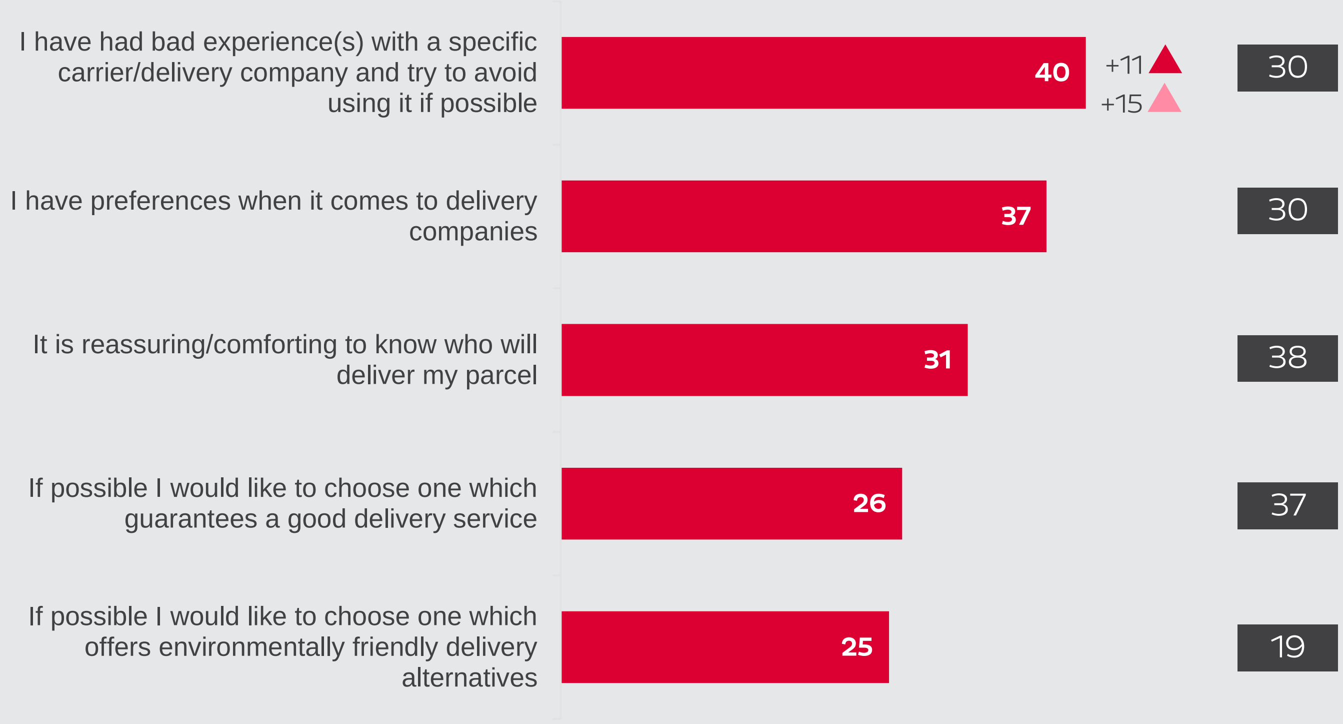
DELIVERY COMPANY

In terms of delivery, the trust in the delivery company remains to be important, especially because of bad experiences in the past for more and more Dutch regulars.



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

Reasons of importance to know the delivery company % (n=346)



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

XX European average

REGULAR E-SHOPPERS

GREEN DELIVERY ALTERNATIVES

Concerning green delivery, this aspect is considered by a growing share of regulars when choosing an e-tailer. A green delivery remains first defined as a combined delivery or through low-emission vehicles, but “slow delivery” is more and more mentioned.

60%

58%

Consider that having choice of environmentally friendly delivery alternatives is important when buying online

90% for transparent/complete delivery costs

84% for free delivery

74% for various options of place of delivery +6 ▲

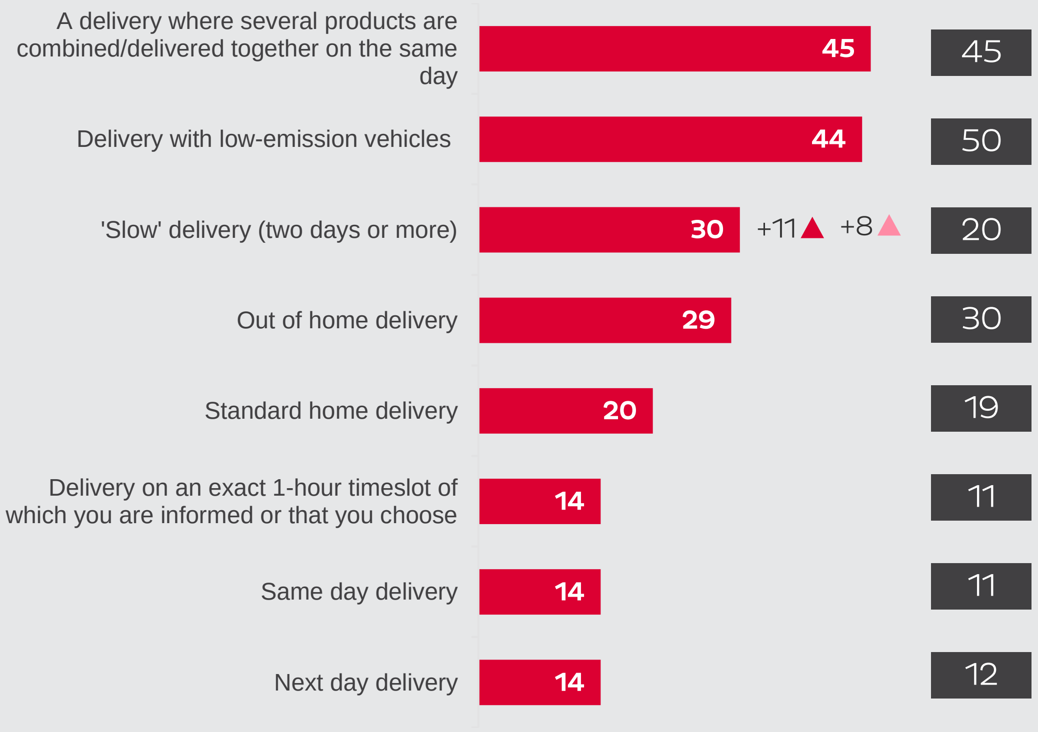
+8 ▲

57%

64%

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

Delivery options perceived as environmentally friendly – %



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

XX European average

EFFORT AND SATISFACTION VS. ONLINE PURCHASE

After the decrease observed in 2021, regular e-shoppers are more satisfied over the last 2 years, particularly with the return and the last delivery.

% - Delivery effort

... found the delivery easy/ effortless

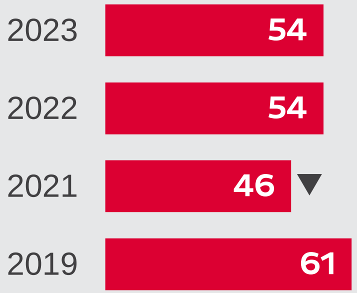
72

% - Last online purchase effort

... consider their last online purchase as easy

71

% - Return effort



... found the return process easy/ effortless

55

% - Rating of last online purchase experience

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

78

XX European average

▲▼ Significant increase/ decrease vs. previous year

REGULAR E-SHOPPERS

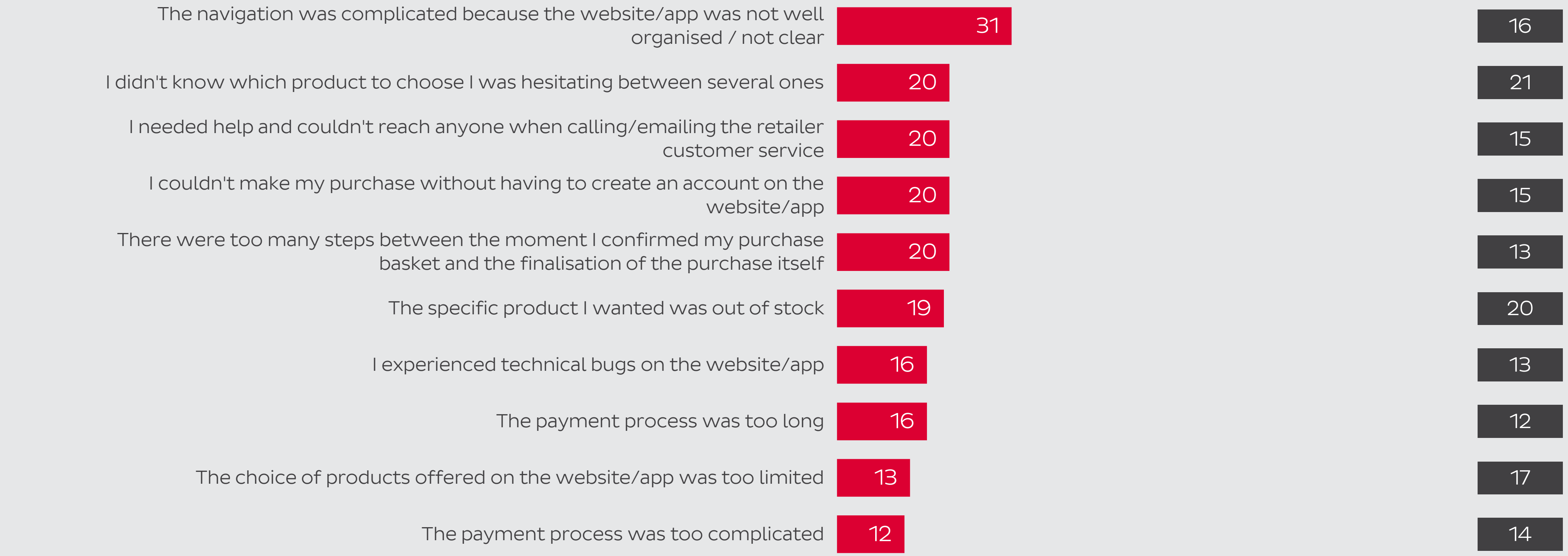
HIGH EFFORT INTO LAST PURCHASE ONLINE *New 2023*

AMONG BUYERS MAKING THE MOST EFFORT

Several factors can affect the purchase experience. Those who put a high effort into their last online purchase first speak about navigation issues, then about hesitation between several products, a too complicated purchase process and difficulties to contact customer service .

TOP 10 Reasons of high effort into the last purchase online

Based on buyers making the most effort for their last online purchase (n=67 - low base)



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

XX European average

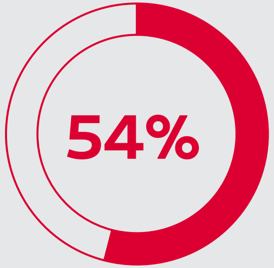
REGULAR E-SHOPPERS

RETURNS

Concerning parcel returns, the same share of Dutch regular e-shoppers made one in 2023 than in 2022, and their perceived easiness is steady. They mainly return their parcels by dropping it off at a parcel shop, and more than what Europeans do.

... returned their last purchase

14%



... Found it easy/effortless (n=403)

55%

Top 3 Return Methods n=403

42%	Dropping it off at a parcel shop	34%
38%	Dropping it off at a post office/station	40%
17%	Carrier picked it up at home	23%

Biggest evolutions vs. 2022 (apart from TOP3)

No other evolution

XX European average

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