Key e-commerce figures

2022

Federation of e-commerce and distance selling

fevad

www.fevad.com

E-commerce
Business to consumer

While 2020 was the year that rocked e-commerce forecasts and triggered huge increases, 2021 saw activity plateau and consumers stick to new purchasing habits. In 2021, more French people made online purchases, and the number of online shoppers using mobile devices to make purchases broke through the +50% mark. Alongside this, consumers' concerns over the pandemic and the environment bolstered the trend for users buying local online, as well as secondhand purchases.

E-COMMERCE SALES

The e-commerce sector continued to grow in 2021 (+15%), buoyed by an acceleration in product sales, and sales in transport, tourism, and leisure picking back up from Q2 2021 on. Despite business returning to normal, the leisure sector still lagged compared to pre-Covid sales. Product sales retained the lion's share of global e-commerce sales despite dropping three points compared to 2020.

€129.1bn
+15.1% compared to 2020
(+24.9% compared to 2019)

E-COMMERCE SALES

2017	+14.3%	81.7
2018	+13.4%	92.6
2019	+11.6%	103.4
2020	+8.5%	112.2
2021	+15.1%	129.1

● Growth rate
● E-commerce sales in billions of Euros
Source: Fevad iCE.

2.14 billion
online **transactions** in 2021
+16.0% compared to 2020
(+22.7% compared to 2019)
Source: Fevad iCE.

PRODUCTS AND SERVICES

+7% on products
(+42% compared to 2019)

+24% on service *(+11% compared to 2019)* of which +44% on transport, tourism, and leisure activities *(-16% compared to 2019)*
Source: Fevad iCE.

	Products	Services
2019	46.9	56.4
2020	62.1	50.1
2021	66.7	62.3

● Sales in billions of Euros
Source: Fevad iCE.

14.1%
of
retail sales*
(*) Excluding fuel, pharmacies, medical and orthopedic items.
Source: Fevad and INSEE.

E-COMMERCE SHARE OF RETAIL

E-commerce accounts for 14.1% of all product retail sales, in a 0.7 point increase on 2020. While e-commerce's market share rocketed in 2020, in 2021 it returned to its pre-pandemic growth rate. In some categories, e-commerce's market share stabilized as the sanitary context improved and in-store sales could resume.

E-COMMERCE SHARE OF THE RETAIL MARKET

2019	46.9	10%
2020	62.1	13.4%
2021	66.7	14.1%

● Sales in billions of Euros
● Share of the retail market
Sources: Fevad and INSEE.

E-COMMERCE SALES AND ONLINE MARKET SHARES BY SECTOR

Sector	Year	Online sales 2021	Online market share
HIGH-TECH HOME EQUIPMENT	2020		33%
	2021	4.7	36%
TOYS	2020		32%
	2021	ND	ND
HOUSEHOLD APPLIANCES	2020		26%
	2021	2.5	25%
NEW PHYSICAL CULTURAL PRODUCTS	2020		24%
	2021	ND	24%
CLOTHING	2020		21%
	2021	5.7	21%
FURNITURE	2020		18%
	2021	3.02	21%
FAST-MOVING CONSUMER GOODS	2020		11%
	2021	11.8	11%

● Online sales 2021 in billions of Euros
● Online market share in sector sales
Sources: GfK for cultural goods (consumer panel) and household equipment; The NPD Group – Consumer panel from January through to September for toys, press release dated 12 January 2021; IFM for clothing; IPEA for furniture; NielsenIQ Homescan (consumer panel) for FMCG.

E-SHOPPERS, M-SHOPPERS

Following a year that saw the number of e-shoppers skyrocket, 2021 and the second year of the pandemic was about customer retention, in which the number of buyers continued to rise more gradually (41.8 million, of which +153,000 compared to 2020). Today, all customer profiles widely engage in online shopping, and almost all Internet users in the 25- to 34-year-old category and high-income professionals now shop online. A tipping point has been reached in m-commerce: +50% of e-shoppers use their mobile devices to make their purchases.

98%

of e-shoppers are **happy with the purchases they have made online** over the past 12 months

Source: Fevad/Médiamétrie feedback, November 2021.

41.8 million

French people **buy online**
(+153,000 compared to 2020)
80% of online users

Source: Médiamétrie - Internet usage observatory for Q4 2021.
Base: overall online users over the past few months aged 11+ years.

ONLINE SHOPPERS PROFILE

% of shoppers per online user target

Men	81.2%
Women	79.5%
11-14 years	37.0%
15-24 years	84.9%
25-34 years	91.7%
35-49 years	89.3%
50-64 years	80.8%
65+ years	71.6%
Higher income professionals	94.8%
Lower income professionals	80.7%
Not in employment	72.0%
Greater Paris area	82.7%
Outside Paris	79.8%
Overall/Across France	80.3%

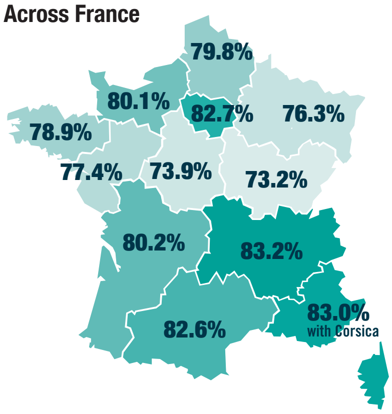
Source: Médiamétrie - Internet usage observatory for Q4 2021.
Base: overall online users over the past few months aged 11+ years.

REGIONAL PENETRATION

% of shoppers per online user target

80.3%

Across France



Source: Médiamétrie - Internet usage observatory for Q4 2021.
Base: overall online users over the past few months aged 11+ years.

MULTI-SCREEN SHOPPING

46%

Multi-screen e-shoppers(+5 pts vs. 2020)

Top three screens used

1. Computer — **78%** (-11 pts *vs.* 2020)
2. Mobile — **59%** (+16 pts *vs.* 2020)
3. Tablet — **17%**

Source: Fevad/Médiamétrie feedback, January 2022.

22.3M

French people make purchases on their mobile devices

(53.3% of all shoppers)

Source: Médiamétrie - Internet usage observatory for Q4 2021.

€60
Average purchase value
-0.8% compared to 2020 (and +1.8% *vs.* 2019).
Source: Fevad iCE.

E-commerce
Business to consumer

FREQUENCY OF PURCHASING, PRODUCTS AND SERVICES PURCHASED

In 2021, the pandemic pushed French people to buy more online (one online purchase per shopper per week on average in 2021). The average purchase value rose in 2020 after eight consecutive years of falling, and dropped slightly in 2021 but remained higher than pre-pandemic levels.

52%
of online users have made a purchase over the past month

69% of online users have made a purchase over the past three months (vs. 67% in Q4 2020)

Source: Médiamétrie - Internet usage observatory for Q4 2021

4.2
online transactions on average per month (vs. 3.7 per month in 2020)

and **€3,100** per shopper over the year (vs. €2,700 in 2020)

Source: Fevad - Médiamétrie/NetRatings.

TOP 15 PRODUCTS AND SERVICES PURCHASED In % of e-shoppers

Fashion/clothing	60%
Cultural products	47%
Games/toys	45%
Footwear	45%
Hygiene/beauty	43%
Home, décor	36%
Tech/household appliances	35%
Textiles/household linens	33%
Food & drink	33%
Trips away	32%
Travel tickets	32%
Online gaming	26%
Music, books, online videos	26%
DIY, gardening	25%
Jewelry/watches	24%

Products
Services

Source: Fevad/Médiamétrie feedback, January 2022.

MARKET PLAYERS

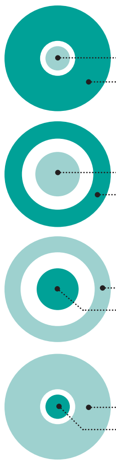
The number of active shopping platforms continued to increase in 2021 at the same pace as 2020: +11% over a year. From the beginning of the pandemic, many brands with stores continued efforts to digitalize by rolling out online sales platforms, and this trend continued over 2021.

+11%
shopping sites compared to Q4 2020

200,100 active shopping sites

Source: Fevad iCE Q4 2021.

BREAKDOWN OF E-COMMERCE ACTIVITY BY SIZE OF ONLINE SHOPPING PLATFORMS



Under €100,000 per year
1.2% of sales in the sector
70.4% of sites

Between €100,000 and €1 million per year
6.7% of sales in the sector
22.4% of sites

Between €1 and €10 million per year
16.3% of sales in the sector
6.0% of sites

Over €10 million per year
75.8% OF SALES IN THE SECTOR
1.2% of sites
Sales generated by *marketplaces* for third-party accounts have been included in the figures for the website that hosts the *marketplace.*
Source: Fevad iCE Q4 2021.

TOP FIVE E-COMMERCE SITES IN TERMS OF PENETRATION

1	Amazon	25,369,000	52.1%
2	Cdiscount	11,002,000	22.6%
3	Fnac	9,679,000	19.9%
4	E.Leclerc	8,659,000	17.8%
5	Decathlon	8,459,000	17.4%

Number of customers: extrapolated to the entire population
Cover: proportion of online users who made a purchase on the website over the past 12 months across all categories.

Source: Fevad/Médiamétrie feedback, November 2021.

PROFITABILITY OF PRODUCT-SELLING WEBSITES

63% turning a profit

12% breaking even

Source: Fevad/LSA/Opinionway feedback, March 2022.

+57 %
remote-selling companies set up in 2020 compared to 2019
a total of 33,000 new businesses

Source: Insee, directory of companies and businesses (Sirene) - Insee Focus n°247. 'Remote-selling' is the joint term used for two Naf rév.2 sub-categories, 'General remote-selling' and 'Specialized remote-selling'.

MARKETPLACES

Marketplaces continued to bring in business for third-party sellers, and in particular micro-businesses and SMEs that were still reeling from the effects of the pandemic in 2021. Sales made on the marketplaces offered up by iCE100 leaders saw 5% growth *vs.* 2020, and a 33% rise *vs.* 2019.

MARKETPLACE BUSINESS VOLUME

14.4%

of business volume for iCE100 product sales Fevad

+5% compared to 2020

(+33% compared to 2019)

Source: Fevad iCE.

2019	+14%
2020	+27%
2021	+5%

36%

of online sellers sell their products on third-party marketplaces

Source: Fevad/LSA/Opinionway feedback, March 2022.

USING MARKETPLACES

RETAIL

29% of legal businesses sell online

6% sell on one or several marketplaces

WHOLESALE

23.5% of legal businesses sell online

30% sell on one or several marketplaces

HOSPITALITY AND FOOD & DRINK

50% sell on one or several marketplaces.

Source: Insee, TIC 2020 survey (2019 figures) - Wholesale & retail in 2020.

E-COMMERCE TO PHYSICAL STORES, SHORT CHANNELS, AND LOCAL STORES

E-shoppers continued to tap into the full diversity of offers available to buy online, in particular the acceleration in physical stores, short channels, and local stores going digital. New online shopping behaviors and buyers' push to shop more responsibly and support local businesses have been a boon for short channels and local stores. This has been particularly true for food companies and restaurants, with e-shoppers jumping on their omni-channel offerings.

PHYSICAL/DIGITAL SYNERGY

Online stores over the past 12 months

In % of e-shoppers

Online-only brands	**67%**
Total Brick and Mortar	**71%**
Large specialist retailers' websites	38%
Large food retailers' websites	33%
Brand websites	23%
Short channel websites	14%
Local store websites	13%

Source: Fevad/Médiamétrie feedback, January 2022.

PHYSICAL/DIGITAL SYNERGY FOR FOOD PURCHASES

In % of online users

ZERO WASTE WEBSITES/APPS

% who know about them and have used them to buy	17%
% who have heard of them	44%

SHORT CHANNELS/FARM-TO-TABLE WEBSITES/APPS

% who know about them and have used them to buy	7%
% who have heard of them	33%

SMALL LOCAL INDEPENDENT STORES WEBSITES/APPS

% who know about them and have used them to buy	3%
% who have heard of them	14%

Source: Fevad/Médiamétrie feedback, May 2022.

THE 'SHOP LOCAL' MOVEMENT

Among online shoppers who have used a local independent store's website to place an order in the past year.

Supporting local businesses	60%
Practical reasons	57%
Skipping in-store visits	41%
Fear of pandemic-related health risks	

Source: Fevad/Médiamétrie feedback, January 2022.

THE RESPONSIBLE CONSUMER MOVEMENT

Among online users who have used a local independent store's website or a short-channel farm-to-table website to place an order.

Shopping local	53%
Product quality	44%
Supporting the local economy	37%

Source: Fevad/Médiamétrie feedback, May 2022.

PHYSICAL/DIGITAL SYNERGY FOR RESTAURANTS

42%

of online users have used **online meal delivery services** in the past 12 months.

Online users who placed an order directly with the restaurant	28%
Online users who placed an order via dedicated websites/apps	27%
Both	13%

Source: Fevad/Médiamétrie feedback, May 2022.

1/5

people who use home delivery services placed an order at least once a week

Source: Fevad/Médiamétrie feedback, May 2022.

E-commerce Business to consumer

185,000
jobs in 2021
(+14% compared to 2020)
Source: Fevad estimate based on Insee, Esane 2019.

E-COMMERCE AND EMPLOYMENT

In 2020, over half of all companies had increased the number of staff allocated to e-commerce activities to meet the rise in demand for orders triggered by the pandemic. The latter paired with changing consumer habits continued to create new jobs in 2021.

48%
of sites increased their workforce in 2021

And **54%** plan on recruiting in 2022

Source: Fevad/LSA/Opinionway feedback, March 2022.

PAYMENT

While payment by bank card is the number-one choice for e-shoppers, alternative methods such as e-wallets, gift cards and transfers continue to gain ground. Alongside this, a growing number of shoppers are opting for 'buy now, pay later' options and payment in installments.

PAYMENT METHODS USED In % of e-shoppers

Single payment by bank card	77%
E-wallet solution (Paypal: 38%; ApplePay: 4%; GooglePay: 4%)	40%
Gift card or voucher	33%
Bank card in three or four installments within three months	19%
Bank transfer or direct debit	16%
Cheque	7%
In-store booking: payment in-store	6%
Store card or credit card (single payment)	4%
Payment to the delivery driver	4%
Store card or credit card (multiple payments)	3%

Source: Fevad/Médiamétrie feedback, September 2021.

SPLIT PAYMENTS AND "BUY NOW, PAY LATER" PAYMENTS In % of e-shoppers

32%
of e-shoppers have already used split payment to pay for an online purchase (vs. 29% who have used it to pay for a purchase in-store)

34%
have already used "buy now, pay later" to pay for an online purchase

Via a deferred debit banking solution	24%
Via a solution offered by an online store	9%
Via a third-party solution	4%

Source: Fevad/Médiamétrie feedback, September 2021.

14%
of e-shoppers have already used these two online payment methods

Source: Fevad/Médiamétrie feedback, September 2021.

DELIVERY

In 2021, e-shoppers continued to opt for home delivery, with 80% of them choosing it as their preferred delivery method. Close to seven out of every 10 online users also made use of collection from a specified location (pick-up point, post office, locker/warehouse, or brick-and-mortar store).

DELIVERY METHODS USED In % of e-shoppers

80%
of e-shoppers had their purchases delivered

DIRECT to their door	79%
to their workplace	3%

67%
had an order delivered to a collection point

62% travelled to a collection point

In pick-up points	59%
In post offices	10%
In warehouses	7%

25% travelled to a brick-and-mortar store

In click & collect points	23%
In-store booking	6%

Source: Fevad/Médiamétrie feedback, November 2021.

33%
of e-shoppers picked up their orders in-store most often (click & collect or drive-through)

14% booked products online and paid for them in-store most often (in-store booking)

Source: Fevad/Médiamétrie feedback, January 2022.

59%
of e-shoppers have used several payment methods to shop online over the past 12 months
Source: Fevad/Médiamétrie feedback, September 2021.

E-COMMERCE IN EUROPE AND AROUND THE WORL

While 2020 saw the Covid-19 pandemic drive sales of products, sales in 2021 were accelerated by the tourism and services sectors bouncing back. Online sales of products around the world reached close to $5 trillion in 2021, accounting for almost a fifth of all global retail sales.

NUMBER OF E-SHOPPERS IN EUROPE

In % of online users

2019	69%
2020	74%
2021	73%

Source: "European E-Commerce Report 2022" by the Amsterdam University of Applied Sciences for Ecommerce Europe.

E-COMMERCE SALES IN EUROPE

€718 billion

+13 % compared to 2020

Source: "European E-Commerce Report 2022" by the Amsterdam University of Applied Sciences for Ecommerce Europe.

- E-commerce sales in billions of Euros
- Growth rate

	Growth rate	E-commerce sales in billions of Euros
2019	+13%	563
2020	+12%	633
2021	+13%	718

Source: "European E-Commerce Report 2022" by the Amsterdam University of Applied Sciences for Ecommerce Europe.

TOP FIVE EUROPEAN COUNTRIES (IN BILLIONS OF EUROS)

1. United Kingdom 162.26
2. France 129.1
3. Germany 108.4
4. Spain 55.83
5. Italy 39.4

Source: "European E-Commerce Report 2022" by the Amsterdam University of Applied Sciences for Ecommerce Europe.

% OF GDP GENERATED BY E-COMMERCE IN EUROPE

2019	3.19%
2020	3.58%
2021	3.92%

Source: "European E-Commerce Report 2022" by the Amsterdam University of Applied Sciences for Ecommerce Europe.

NUMBER OF E-SHOPPERS AROUND THE WORLD

E-shoppers in billions of individuals

	% of the population	E-shoppers in billions of individuals
2019	NC	2.11
2020	30.7%	2.37
2021	31.9%	2.48

- E-shoppers in billions of individuals
- % of the population

Source: eMarketer, January 2022. Online users who made at least one purchase online over the year (across all screens).

E-COMMERCE SALES AROUND THE WORLD

$4938 trillion

+16.3 % compared to 2020

Source: eMarketer, December 2021 and January 2022. Products and services ordered online, excluding trips, tickets for events, food & drink services, and gambling.

- E-commerce sales in billions of $
- Retail sales market share

	Retail sales market share	E-commerce sales in billions of $
2019	13.6%	3361
2020	17.9%	4248 (+26.4 % *vs.* previous year)
2021	19.0%	4938 (+16.3 % *vs.* previous year)

Source: eMarketer, December 2021 and January 2022.

CHINA

2019	1801
2020	2297
2021	2488

UNITED STATES

2019	598
2020	792
2021	919

Source: eMarketer, December 2020 and January 2022. Products and services ordered online, excluding trips, tickets for events, food & drink services, and gambling.

INTERNATIONAL SALES

Two out of every three sites did business internationally and maintained this in 2021. As the global sanitary situation has improved and international trade has picked back up, a significant majority of them are forecasting growth in international sales for the next two years.

64%

of leading sites sell internationally

61% *via* local brick-and-mortar presence

60% directly from France

15% via international marketplaces

Source: Fevad/LSA/Opinionway feedback, March 2022.

TOP FIVE COUNTRIES WHERE FEVAD MEMBER COMPANIES ARE PRESENT

In % of sites that sell internationally

1. Belgium 81%
2. Spain 69%
3. Italy 61%
4. Germany 55%
5. United Kingdom 52%

Source: Fevad/LSA/Opinionway feedback, March 2022.

31%

of sites that sell internationally have a foothold in over **10** countries

Source: Fevad/LSA/Opinionway feedback, March 2022.

85%

of sites are forecasting a rise in the proportion of international sales they expect to see over the next two years

(54%, a significant increase)

Source: Fevad/LSA/Opinionway feedback, March 2022.

E-commerce Business to business

Companies going digital set against the backdrop of the pandemic continues to bolster online selling to professionals and businesses. Customer-supplier relations continue to play out online, with physical meetings having picked back up too. The criteria that now go in to choosing a supplier are increasingly linked to digital usages (stock availability, ease of placing orders online, etc.).

SALES OF PRODUCTS

In 2021, growth in sales to professionals (sales of industrial/specialist products, office and IT equipment) returned to its pre-pandemic trajectory (+16% compared to 2020, +29% compared to 2019).

E-COMMERCE SALES GROWTH

+16%
compared to 2020*(+29% compared to 2019)*

2019	+14%
2020	+11%
2021	+16%

Source: Fevad iCE100 BtoB, sales of industrial/specialist products, office and IT equipment panel.

HOW THE TWO YEARS OF THE COVID-19 PANDEMIC IMPACTED ON COMPANIES' PURCHASING PATTERN

The pandemic and business digitalisation are impacting customer-supplier relations, from negotiations to choosing who to work with. It has now become customary to use digital channels to communicate and foster customer-supplier relations, and in 2021 these new usages went hand in hand with physical meetings with suppliers clearly resuming. Businesses continued to place more orders online and make use of the Internet at every stage, from business relations and purchase prep to negotiations and beyond. Stock availability has become a key criteria in supplier selection in the context of B2B purchases.

HYBRID MODELS IN WORKFLOWS AND COMMUNICATING WITH SUPPLIERS
In % of clients surveyed

33%
allow remote-working,
of which **28%** operate a hybrid office-based/home-working system

20%
believe working out of **third-party premises** is set to grow *(+4 pts* vs. *2020)*

38%
think video meetings are on the rise and set to stay *(-6 pts* vs. *2020)*

Source: Fevad/Médiamétrie study – December 2021.

70%
of clients that communicate with suppliers have returned to in-person meetings *(+7 pts* vs. *2020)*

Because often it's more efficient	**25%** (+6 pts *vs.* 2020)
At key points in discussions or for some specific orders	**45%**

Source: Fevad/Médiamétrie study – December 2021.

GROWTH IN ONLINE ORDERS LINKED TO THE COVID-19 PANDEMIC
In % of clients surveyed

Legend: OVERALL, Microbusinesses, SMEs, Intermediate/large companies

	Overall	Microbusinesses	SMEs	Intermediate/large companies
YES, THIS IS SET TO LAST	28% (+7 pts *vs.* 2020)	35% (+6 pts *vs.* 2020)	24%	27%
YES, BUT ONLY IN EXCEPTIONAL CASES	12%	10%	12%	12%
NO, THE OPPOSITE IS TRUE: IT HAS TENDED TO DROP	1%	1%	0%	1%

Source: Fevad/Médiamétrie study – December 2021.

TOP THREE CRITERIA IN CHOOSING A SUPPLIER FOR ONLINE PURCHASES

Legend: Microbusinesses, SMEs, Intermediate/large companies

	Microbusinesses	SMEs	Intermediate/large companies
1 Stock availability (+7 pts *vs.* 2020)	52%	50%	53%
2 Price (+10 pts and +7 pts *vs.* 2020 for microbusinesses and SMEs)	51%	55%	47%
3 Ease of placing orders online (+6 pts *vs.* 2020)	43%	34%	37%

Source: Fevad/Médiamétrie study – December 2021.

40%
feel the Covid-19 crisis prompted them to develop their online ordering
(+8 % pts *vs.* 2020), of which 28% believe this will last
Source: Fevad/Médiamétrie study – December 2021.

The Covid-19 crisis and e-commerce sales

In 2020, consumers' habits were turned upside-down by the pandemic. In 2021, many trends gained traction, and purchasing practices that had once been occasional became more habitual for consumers.

HOW THE TWO YEARS OF THE COVID-19 PANDEMIC IMPACTED ON E-SHOPPERS' HABITS

In 2021, the number of e-shoppers grew by 0.4%: slower growth compared to 2020 (+3.8%). The vast majority of buyers who had discovered online shopping in 2020 returned to the Internet to shop in 2021, both because they had been won over by this way of shopping, and out of a fear of health risks. 2021 was also marked by an acceleration in new online consumer trends: buying local, secondhand, etc.

NEW E-SHOPPERS CAPTURED FOR REPEAT BUSINESS

in millions of French people

2019	40.1
2020	41.6
2021	41.8

+0.4%

over 2021/2020 *(following on from +3.8% over 2020/2019)*

Source: Médiamétrie – Internet usage observatory.

58%

of new **online food shoppers (FMCG**) in 2020 *(a total of 3.3 million households)* continued shopping online in 2021

Source: NielsenIQ Homescan/Fevad May 2022.

ACCELERATION IN PURCHASING FREQUENCY

in thousands of e-shoppers and % of online users

	2021		2020	
PAST SIX MONTHS	38,232	74%	37,395	73%
PAST THREE MONTHS	35,723	69%	34,459	67%
PAST MONTH	27,153	52%	27,241	53%

Source: Médiamétrie – Internet usage observatory – E-commerce 2021 report. Base: online users in the past month who have already made an online purchase.

38%

of e-shoppers order more online since the start of the pandemic

Source: Fevad/Médiamétrie feedback, January 2022.

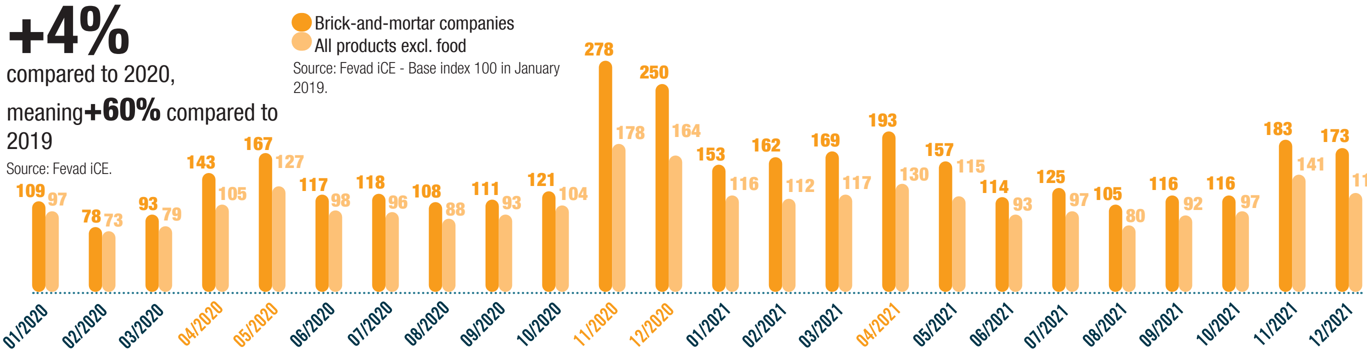
ACCELERATION OF BRICK-AND-MORTAR COMPANIES' ONLINE SALES

Sales growth for iCE100 sites' product sales excl. FMCG excl. marketplaces

+4%

compared to 2020, meaning **+60%** compared to 2019

Source: Fevad iCE.



SALES GROWTH BY PRODUCT CATEGORY

INTENSE GROWTH IN FOOD, FURNITURE/DÉCOR AND BEAUTY PRODUCTS

FAST-MOVING CONSUMER GOODS AND FOOD PRODUCTS

+59% in e-commerce sales compared to 2019 *(+10.8%* vs. *2020)*

Source: NielsenIQ Homescan (consumer panel).

FURNITURE/DÉCOR

+46% in e-commerce sales compared to 2019 *(+18%* vs. *2020)*

Source: Fevad iCE.

HYGIENE/BEAUTY

+47% in e-commerce sales compared to 2019 *(-3%* vs. *2020)*

Source: Fevad iCE.

HIGH-TECH AND HOUSEHOLD APPLIANCES

+26% in e-commerce sales compared to 2019 *(-6%* vs. *2020)*

Source: Fevad iCE.

CLOTHING/HOUSEHOLD TEXTILES

+22% in e-commerce sales compared to 2019 *(+6%* vs. *2020)*

Source: Fevad iCE.

TOP THREE REASONS

1. **Advantages not available in-store**
   48% (+22 pts *vs.* 2020)
2. **In-store sanitary restrictions**
   46% (+0 pts *vs.* 2020)
3. **Avoiding in-store trips and sanitary risks as a result**
   41% (-12 pts *vs.* 2020)

Source: Fevad/Médiamétrie feedback, January 2022.

Companies' Corporate Social Responsibility & e-commerce

Over the years, CSR has come to play an increasingly important role in the eyes of online consumers. In 2021, 80% of e-shoppers said they had already bought and/or sold a secondhand item online. Ever aware of issues surrounding reducing their environmental footprint and meeting emerging needs, companies have made this a key strategic priority. In this sense, e-commerce helps bring the circular economy to the many.

E-COMMERCE & ENVIRONMENTAL IMPACT

Two-thirds of online shoppers say they would have had to use their car if they had made their non-food purchases in-store rather than online. In this sense, home delivery cuts back on a significant proportion of car journeys that would otherwise be made. This proportion is higher among e-shoppers living in small- to medium-sized towns and rural areas.

MEANS OF TRANSPORT USED TO MAKE NON-FOOD PURCHASES IN-STORE RATHER THAN ONLINE

In % of e-shoppers

Car	67%
Foot	12%
Public transport	12%
Bike or scooter	2%
Motorbike/two-wheeler	1%

Source: Fevad/Médiamétrie feedback, November 2021.

A TOP CONSUMER PRIORITY

Consumers' expectations in terms of CSR continue to grow. The vast majority of shoppers keep a close eye on brands' activities in this area and feel companies have improved their approach to packaging (less packaging, reusable packaging, etc.).

E-SHOPPERS HAVE NOTED AN IMPROVEMENT IN E-COMMERCE SITES' CSR IN % OF E-SHOPPERS

Decrease in quantities of packaging used	81%
Reusable packaging used	77%
Eco-responsible products offered	68%
Solutions for decreasing carbon footprint in place	67%
Information on production/manufacturing country provided	65%

Source: Fevad/Médiamétrie feedback, January 2022.

FRENCH-MADE GOODS: A KEY FACTOR IN THE DECISION TO BUY

In % of e-shoppers

The French-made angle plays a bigger part in buying criteria	66%
French-made goods more easily sourced thanks to the Internet	66%
Agree to paying more for a food product bought online if it is French-made	58%
Agree to paying more for a non-food product bought online if it is French-made	56%
Prepared to do without a product found online if it is not from Europe	48%

% who agree

Source: Fevad/Médiamétrie feedback, January 2022.

ONLINE SELLERS' CSR ACTIVITIES

On 28 July 2021, 14 major online retailers came together with the French government and the Fevad to take action for more sustainable e-ecommerce by signing the "Charter for Reducing Online Retail's Environmental Impact": a framework document that includes pledges and policies surrounding keeping consumers informed, packaging, storing and warehousing, and delivery. On 15 March 2022, 18 new companies joined the movement and signed the charter too.

DELIVERY

In % of online sellers

Use of eco-responsible and/or recyclable packaging

- 56%
- 30%
- 14%

Use of reusable and/or returnable packaging

- 16%
- 37%
- 46%

Already available / Coming soon / Nothing planned

Source: Fevad/LSA/Opinionway feedback, March 2022.

THE PANDEMIC AND LASTING CONSEQUENCES FOR COMPANIES

In % of online sellers

Changes to procurement policies to prioritize French- or European-made goods: 77%

CSR issues made a priority: 76%

Remote-working made permanent: 75%

Growth of secondhand market: 62%

% who agree

Source: Fevad/LSA/Opinionway feedback, March 2022.

CHANGES IN PURCHASING PATTERNS

In % of online sellers

	% have already	% will do in the near future
Supplier compliance with social standards	58%	21%
Decrease in purchases with high environmental impact	52%	24%
Consideration given to French-made aspect	47%	26%
Consideration given to European-made aspect	50%	23%
Growth in short-channel purchases	43%	17%

Source: Fevad/LSA/Opinionway feedback, March 2022.

E-COMMERCE: DRIVING THE CIRCULAR ECONOMY

Buying secondhand goods is becoming increasingly common online. Two of the five most-visited shopping websites buy and sell secondhand items, a figure that is made all the more impactful at a time when 80% of e-shoppers say they have already bought and/or sold a secondhand item online.

TOP FIVE E-COMMERCE SITES IN AUDIENCE NUMBERS

	Site	Average unique visitors per month	Average monthly cover (in % of the French population)
1	Amazon	36,811,000	58.3%
2	Leboncoin	26,895,000	42.6%
3	Cdiscount	22,877,000	36.3%
4	Fnac	19,121,000	30.3%
5	Vinted	17,214,000	27.3%

Source: Médiamétrie//NetRatings- Global Internet audience – Average Q4 2021.

B2B AND SECONDHAND PURCHASES

43%

of e-shoppers would be prepared to buy secondhand goods for their company

TOP THREE PRODUCTS

1	Office furniture, items that improve comfort and communication	28%
2	Industrial supplies and equipment	23%
3	Office supplies	21%

Source: Fevad/Médiamétrie study – December 2021.

ONLINE PURCHASES AND SALES OF REFURBISHED OR SECONDHAND ITEMS

50%

of online buyers **bought** refurbished or secondhand items online in 2021

Source: Fevad/Médiamétrie feedback, January 2022.

TOP FIVE REASONS

1	To save money	80%
2	To buy branded goods	51%
3	For the satisfaction of hunting down a bargain	50%
4	For environmental reasons	48%
5	For budget reasons	43%

Source: Fevad/Médiamétrie feedback, January 2022.

70%

of e-shoppers have already **sold products online**

Unused products	79%
Products to replace	27%
Gifts received	10%

Source: Fevad/Médiamétrie feedback, January 2022.

Over 80% of e-shoppers have already bought refurbished or secondhand products and/or sold products themselves online

Source: Fevad/Médiamétrie feedback, January 2022.

Federation of e-commerce and remote-selling
60 rue La Boétie – 75008 Paris – Tel. +33(0)1 42 56 38 86 – contact@fevad.com
This data is taken from studies conducted by the Fevad and its partners. For more information, visit www.fevad.com

Fevad – Siret (company registration number) 784 854 994 00034 – June 2022
Graphic design: Wefactory&Co – **Photo credits:** AdobeStock