Big Ecommerce Survey
2019
Survey background and themes

- Attitudes: brick-and-mortar vs. online stores
- Finding the product vs. buying it
- Frequency of online shopping
- Product categories
- What is important in online shopping
- Preferred online stores
- Preferred payment methods
- Online purchases during campaigns or seasons
- Which delivery options would increase online shopping
- Preferred shipping options and shipping companies
- Country of origin and delivery times
- Returns
- Growing your shopping cart to get free shipping
- Peer-to-peer marketplaces
- Best online stores

Target group
Finnish, Estonian, Latvian and Lithuanian internet users aged 18-79
Covers well the active population.

Number of respondents
2,140 in Finland, 539 in Estonia, 620 in Latvia and 614 in Lithuania
On a scale from 1 to 10, describe your attitude towards buying goods in retail shops and online shops

Currently I...

In 2025, I believe I will...

10 = Buy everything online
9 = Buy mostly online
8 = Buy mostly at retail shops
7 = Buy mostly at retail shops
6 = Buy mostly at retail shops
5 = Buy mostly at retail shops
4 = Buy mostly at retail shops
3 = Buy mostly at retail shops
2 = Buy mostly at retail shops
1 = Buy everything from a retail store
Don't know

Kantar TNS internet board June-July 2019
In the last six months, how often have you...

- **Looked for goods in an online shop but bought them in a physical shop.**
  - 22% two or three times
  - 21% only occasionally
  - 34% never
  - 17% don't know
  - 7%

- **Looked for goods in a retail shop but bought them online.**
  - 7% two or three times
  - 12% only occasionally
  - 29% never
  - 46% don't know
  - 6%

**Number of times**

*n=1951*

Kantar TNS internet board June-July 2019
When did you last buy goods from an online shop?

- **Finland**
  - 6% yesterday
  - 17% during past week
  - 26% during past month
  - 15% during past 2-3 months
  - 16% during past 4-12 months
  - 10% more than a year ago
  - 9% I have not shopped online
  - 2% don't know

- **Estonia**
  - 9% yesterday
  - 23% during past week
  - 26% during past month
  - 16% during past 2-3 months
  - 11% during past 4-12 months
  - 7% more than a year ago
  - 7% I have not shopped online

- **Latvia**
  - 8% yesterday
  - 20% during past week
  - 24% during past month
  - 17% during past 2-3 months
  - 13% during past 4-12 months
  - 7% more than a year ago
  - 8% I have not shopped online
  - 3% don't know

- **Lithuania**
  - 15% yesterday
  - 29% during past week
  - 27% during past month
  - 12% during past 2-3 months
  - 9% during past 4-12 months
  - 4% more than a year ago
  - 4% I have not shopped online
  - 1% don't know

Kantar TNS internet board June-July 2019
How much of your shopping has been done online in the last six months?

<table>
<thead>
<tr>
<th>Product Category</th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDs and DVDs</td>
<td>59%</td>
<td>43%</td>
</tr>
<tr>
<td>Games, computer and console games *</td>
<td>51%</td>
<td>55%</td>
</tr>
<tr>
<td>Home electronics, IT, phones, electronic devices and equipment</td>
<td>44%</td>
<td>33%</td>
</tr>
<tr>
<td>Books and magazines (not e-books)</td>
<td>42%</td>
<td>33%</td>
</tr>
<tr>
<td>Other products and supplies related to hobbies</td>
<td>41%</td>
<td>25%</td>
</tr>
<tr>
<td>Sports equipment</td>
<td>38%</td>
<td>25%</td>
</tr>
<tr>
<td>Clothes, shoes and accessories</td>
<td>37%</td>
<td>27%</td>
</tr>
<tr>
<td>Pet products</td>
<td>34%</td>
<td>22%</td>
</tr>
<tr>
<td>Children's products and toys</td>
<td>33%</td>
<td>23%</td>
</tr>
<tr>
<td>Furniture, interior design products</td>
<td>33%</td>
<td>21%</td>
</tr>
<tr>
<td>Beauty and health products</td>
<td>32%</td>
<td>23%</td>
</tr>
<tr>
<td>Vehicles, spare parts, equipment</td>
<td>29%</td>
<td>20%</td>
</tr>
<tr>
<td>Home appliances, kitchen utensils and kitchenware</td>
<td>26%</td>
<td>18%</td>
</tr>
<tr>
<td>Building and repair products</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Gardening products, plants</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Daily consumer goods, such as detergents and cleaners</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Medication</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Food and drink</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Alcoholic beverages</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

* 2019: Stated separately “non-digital download”
Kantar TNS internet board June-July 2019
Which of the following is important when shopping online?

<table>
<thead>
<tr>
<th>Feature</th>
<th>Extremely important</th>
<th>Somewhat important</th>
<th>Don't know</th>
<th>Not at all important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clearly stated delivery costs</td>
<td>70%</td>
<td>23%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Detailed product descriptions and pictures</td>
<td>65%</td>
<td>27%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Inexpensive delivery costs</td>
<td>57%</td>
<td>35%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Affordable prices</td>
<td>56%</td>
<td>36%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Seamless shopping experience</td>
<td>55%</td>
<td>37%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Being able to shop whenever I want</td>
<td>53%</td>
<td>34%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Extensive product range</td>
<td>50%</td>
<td>40%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Free returns</td>
<td>48%</td>
<td>34%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Simple returns process</td>
<td>48%</td>
<td>38%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Good search functions</td>
<td>47%</td>
<td>42%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Web pages in your mother tongue</td>
<td>46%</td>
<td>32%</td>
<td>4%</td>
<td>18%</td>
</tr>
<tr>
<td>Reputation of the online store</td>
<td>43%</td>
<td>45%</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>Free delivery</td>
<td>41%</td>
<td>44%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Accessibility of customer service</td>
<td>38%</td>
<td>46%</td>
<td>4%</td>
<td>18%</td>
</tr>
<tr>
<td>Many different payment options</td>
<td>31%</td>
<td>46%</td>
<td>9%</td>
<td>22%</td>
</tr>
<tr>
<td>Mobile friendly web pages</td>
<td>30%</td>
<td>39%</td>
<td>5%</td>
<td>22%</td>
</tr>
<tr>
<td>Not needing to leave home to shop</td>
<td>29%</td>
<td>43%</td>
<td>5%</td>
<td>17%</td>
</tr>
<tr>
<td>Possibility of tracking the delivery</td>
<td>28%</td>
<td>50%</td>
<td>5%</td>
<td>17%</td>
</tr>
<tr>
<td>Many different collection points</td>
<td>28%</td>
<td>50%</td>
<td>5%</td>
<td>17%</td>
</tr>
<tr>
<td>Fast deliveries</td>
<td>25%</td>
<td>51%</td>
<td>7%</td>
<td>17%</td>
</tr>
<tr>
<td>Origin of the products</td>
<td>21%</td>
<td>44%</td>
<td>6%</td>
<td>28%</td>
</tr>
<tr>
<td>Option to have the product delivered to my home</td>
<td>20%</td>
<td>46%</td>
<td>8%</td>
<td>27%</td>
</tr>
<tr>
<td>Environmentally friendly packaging</td>
<td>19%</td>
<td>51%</td>
<td>8%</td>
<td>22%</td>
</tr>
<tr>
<td>Eco-friendly products</td>
<td>18%</td>
<td>49%</td>
<td>8%</td>
<td>22%</td>
</tr>
<tr>
<td>Domestic origin of the products</td>
<td>17%</td>
<td>45%</td>
<td>6%</td>
<td>28%</td>
</tr>
<tr>
<td>Environmentally friendly delivery</td>
<td>16%</td>
<td>41%</td>
<td>6%</td>
<td>28%</td>
</tr>
<tr>
<td>Possibility of choosing the delivery date</td>
<td>16%</td>
<td>52%</td>
<td>6%</td>
<td>25%</td>
</tr>
<tr>
<td>Product reviews by other customers</td>
<td>10%</td>
<td>34%</td>
<td>13%</td>
<td>42%</td>
</tr>
<tr>
<td>Recommendations for products that fit my profile</td>
<td>10%</td>
<td>23%</td>
<td>6%</td>
<td>28%</td>
</tr>
<tr>
<td>Possibility of weekend delivery</td>
<td>10%</td>
<td>26%</td>
<td>7%</td>
<td>57%</td>
</tr>
<tr>
<td>Possibility of evening delivery</td>
<td>7%</td>
<td>21%</td>
<td>7%</td>
<td>65%</td>
</tr>
<tr>
<td>Possibility of an express delivery on the same day</td>
<td>7%</td>
<td>21%</td>
<td>7%</td>
<td>65%</td>
</tr>
</tbody>
</table>

(n=1951)
Extremely important

TOP 10

• Clearly stated delivery costs (70%)
• Detailed product descriptions and pictures (65%)
• Inexpensive delivery costs (57%)
• Affordable prices (56%)
• Seamless shopping experience (53%)
• Being able to shop whenever I want (53%)
• Extensive product range (50%)
• Free returns (48%)
• Simple returns process (48%)
• Good search functions (47%)

Kantar TNS internet board June-July 2019
From which of the following online shops have you bought during past 6 months? TOP-20

- Zalando.fi
- Verkkokauppa.com
- Adlibris.com
- CDON.com
- Amazon
- eBay
- hm.com
- Gigantti.fi
- Kärkkäinen
- elisa.fi
- AliExpress.com
- Wish.com
- XXL.fi
- Motonet.fi
- Fiksruruoka.fi
- Ifolor.fi
- Power.fi
- Ellos
- Boozt.com
- Dermoshop.com

(n=1951)

Kantar TNS internet board june-july 2019
During which of the following campaigns or other peak periods have you been shopping online?

- Black Friday: 23%
- Christmas: 22%
- Summer sale: 16%
- Crazy Days (Hullut Päivät): 8%
- January sale: 7%
- Cyber Monday: 5%
- Mammuttimarkkinat: 4%
- Mother's Day: 3%
- New Year: 3%
- Back to school: 3%
- Valentine's Day: 2%
- Singles Day: 2%
- Father's Day: 2%
- Halloween: 2%
- End of term and graduation: 2%
- Amazon Prime Day: 1%
- Other (n=1951): 2%

Kantar TNS internet board June-July 2019
Would the following delivery-related options increase your online shopping in the future?

- Free deliveries: 60%
- Parcel tracking and routing: 33%
- Predictive notifications about the delivery time: 30%
- Choosing an exact delivery date: 29%
- Real-time notifications about the delivery stage: 29%
- Next-day delivery: 26%
- Package delivery straight to your personal parcelbox: 26%
- Possibility of tracking the delivery on a map: 23%
- Delivery to a safe location, for example the back garden: 19%
- Same-day delivery: 19%
- Changing the destination or delivery method when the package is...: 19%
- Evening deliveries: 18%
- Weekend deliveries: 18%
- Automatic delivery of products (e.g. subscribe and save 15%): 17%
- Unlimited free delivery for a monthly payment (e.g. Amazon Prime): 15%
- Two-hour express deliveries: 15%
- Authorising a neighbour to receive the package on your behalf if...: 14%

Kantar TNS internet board June-July 2019 (n=2140)
What is your preferred delivery method for products bought online? Where do you choose to have your items delivered?

- Parcel locker: 35%
- Posti or transport company service point: 32%
- Home delivery at a specified time: 12%
- Letterbox: 10%
- Online retailer's physical shop: 3%
- Delivery to your workplace at a specified time: 1%
- Don't know: 1%
- Other: 6%

(n=1951)

Kantar TNS internet board june-july 2019
What is your preferred delivery method for products bought online? Where do you choose to have your items delivered?

- Finland:
  - Parcel locker: 35%
  - Home delivery at a specified time: 32%
  - Delivery to your workplace at a specified time: 12%
  - Other, please specify: 10%
  - Letterbox: 6%
  - The online retailer's physical shop: 3%
  - Don't know: 1%

- Estonia:
  - Parcel locker: 67%
  - Home delivery at a specified time: 6%
  - Delivery to your workplace at a specified time: 20%
  - Other, please specify: 2%
  - Letterbox: 3%
  - The online retailer's physical shop: 11%
  - Don't know: 1%

- Latvia:
  - Parcel locker: 29%
  - Home delivery at a specified time: 13%
  - Delivery to your workplace at a specified time: 30%
  - Other, please specify: 5%
  - Letterbox: 10%
  - The online retailer's physical shop: 8%
  - Don't know: 2%

- Lithuania:
  - Parcel locker: 31%
  - Home delivery at a specified time: 3%
  - Delivery to your workplace at a specified time: 42%
  - Other, please specify: 6%
  - Letterbox: 6%
  - The online retailer's physical shop: 9%
  - Don't know: 2%

Kantar TNS internet board June-July 2019
Which of the following delivery or distribution companies do you prefer to use?

- Posti: 56%
- Matkahuolto: 10%
- DHL: 6%
- PostNord: 4%
- Schenker: 3%
- UPS: 2%
- Other: 1%
- Don't know: 19% (n=2140)

Kantar TNS internet board June-July 2019
From which country was the last item you bought from an online store sent?

- Finland: 61%
- Germany: 9%
- Sweden: 7%
- Asia: 6%
- England: 2%
- USA: 2%
- Other: 3%
- Don't know: 11% (n=1951)

Kantar TNS internet board June-July 2019
How long was the delivery time for the last item you bought online, from placing the order to delivery?

Kantar TNS internet board June-July 2019
Are you planning on returning, or did you return, the most recent delivery you received?

- 84% Not planning on returning it
- 4% I don't know yet, I haven't decided
- 5% Don't know
- 4% I am planning on it or I have returned it in part
- 3% I am planning on it or I have returned it in its entirety

(n=1951)

Kantar TNS internet board June-July 2019
How often have you added products to your shopping basket in order to get a free delivery once the total amount exceeds a certain limit?

- Finland: 63% (9% Frequently, 32% Sometimes, 22% Rarely, 33% Never, 4% Don't know)
- Estonia: 55% (7% Frequently, 25% Sometimes, 23% Rarely, 42% Never, 3% Don't know)
- Latvia: 57% (8% Frequently, 26% Sometimes, 23% Rarely, 36% Never, 6% Don't know)
- Lithuania: 67% (12% Frequently, 33% Sometimes, 22% Rarely, 31% Never, 2% Don't know)

Kantar TNS internet board June-July 2019
Which online marketplaces for private individuals have you used in the last 6 months?

- Tori: 67%
- Facebook: 43%
- Huuto.net: 24%
- Ebay: 7%
- Other: 6%
- Don't know (n=861): 3%

What are your main reasons for selling and buying used goods online?

- I save money by buying used goods: 58%
- I make money by selling unnecessary goods: 58%
- I recycle goods that would otherwise be waste: 42%
- I can find interesting or special goods: 32%
- Other: 2%
- Don't know (n=861): 3%

Kantar TNS internet board June-July 2019
Consumers have chosen the best online shops.
Best online shops according to Baltic consumers
Sum of Top-of-mind and other mentions

Estonia

- Aliexpress: 23
- Kaup24: 22
- 1a: 14
- eBay: 14
- Amazon: 12
- Hansapost: 11
- On24: 8
- Selver: 6
- Euronics: 5
- Mylook: 4
- Sportsdirect: 4
- K-Rauta: 3
- Love: 3
- Osta.ee: 3
- Telia: 3
- Kaubamaja: 3
- ASOS: 3
- Aphoteka: 3
- Barbora (Maxima): 3
- Rahva Raamat: 3

Latvia

- Aliexpress: 25
- 1a: 14
- Amazon: 14
- Rdveikals.lv (RD…): 10
- xnet.lv: 7
- Barbora (Maxima): 6
- Wish: 5
- Sportsdirect: 4
- TopShop: 3
- m79.lv: 3
- nuko.lv: 3
- perkamkapa.lv: 2
- membership.lv: 2
- Alibaba: 2
- ASOS: 2
- Alibana: 2
- Reserve: 2
- Internetaptieka.lv: 2

Lithuania

- Pigu.lt: 56
- Senukai.lt: 24
- Aliexpress: 22
- Barbora (Maxima): 19
- Varle.lt: 18
- 1a: 8
- Camelia: 8
- Amazon: 7
- Eurovaistine.lt: 7
- eBay: 7
- Topcentras.lt: 6
- rde.lt: 5
- Wish: 4
- Skytech.lt: 4
- Knygos.lt: 4
- Membershop: 3
- Gintarine.lt: 3
- Elektromarkt: 3
- Vinted.lt: 3
- TopShop: 2

(n=499) (n=570) (n=591)

Kantar TNS internet board June-July 2019
In your experience, which online shops are the best?

Voted also as the best online shop e.g.

<table>
<thead>
<tr>
<th>Asos.com</th>
<th>Fiksuruoka.fi</th>
<th>Matsmart.fi</th>
<th>Suomalainen.com</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booky.fi</td>
<td>Fitnesstukku.fi</td>
<td>Motonet.fi</td>
<td>Taloon.com</td>
</tr>
<tr>
<td>Boozt.com</td>
<td>HobbyHall.fi</td>
<td>Mustijamirri.fi</td>
<td>TokNet.fi</td>
</tr>
<tr>
<td>Bubbleroom.fi</td>
<td>Hyvinvoinnin.fi</td>
<td>Nelly.com</td>
<td>Valitutpalat.fi</td>
</tr>
<tr>
<td>BudgetSport.fi</td>
<td>Ifolor.fi</td>
<td>Power.fi</td>
<td>Varusteleka.fi</td>
</tr>
<tr>
<td>Cellbes.fi</td>
<td>iHerb.com</td>
<td>Prisma.fi</td>
<td>Viherpeukalot.fi</td>
</tr>
<tr>
<td>ClasOhlson.com</td>
<td>InkClub.com</td>
<td>Sokos.fi</td>
<td>Wish.com</td>
</tr>
<tr>
<td>Discshop.fi</td>
<td>Intersport.fi</td>
<td>Sportamore.fi</td>
<td>XXL.fi</td>
</tr>
<tr>
<td>Ellos</td>
<td>Jollyroom</td>
<td>sskk.fi</td>
<td>Yliopistonapteekki.fi</td>
</tr>
<tr>
<td>Emp.fi</td>
<td>KLINGEL.fi</td>
<td>Stadium.fi</td>
<td>Yves-Rocher.fi</td>
</tr>
<tr>
<td>e-ville.com</td>
<td>Levykauppax.fi</td>
<td>Stockmann.com</td>
<td>Zooplus.fi</td>
</tr>
</tbody>
</table>

Kantar TNS internet board June-July 2019
In your experience, which online shops are the best? – winners

Best Finnish online store
1. prize 12 %
3. Adlibris (7 %)
4. CDON (7 %)
5. Amazon (6 %)
6. Ebay (6 %)
7. H&M (4 %)

Best Finnish online store
2. prize 10 %
8. Elisa (4 %)
9. Kärkkäinen (3 %)
10. Dermoshop (3 %)
11. Gigantti (3 %)
12. Aliexpress (3 %)

Kantar TNS internet board june-july 2019