



GERMANY 2022

Ecommerce Country Report

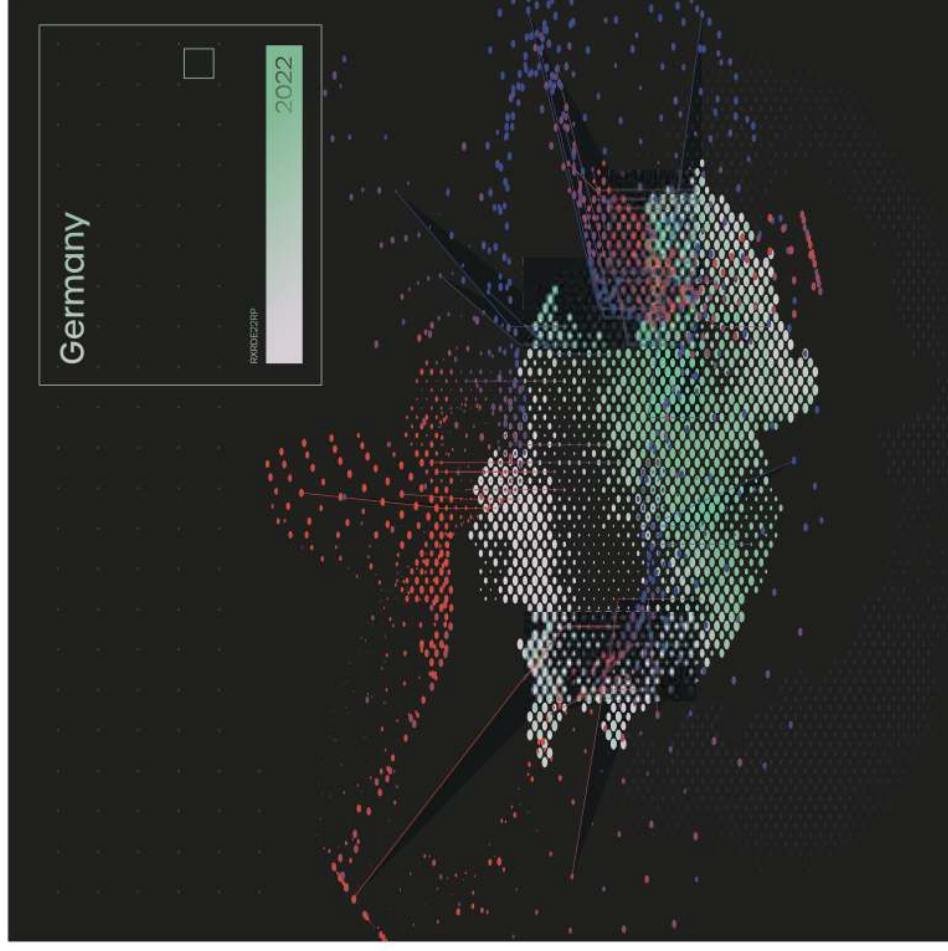
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Introduction



Welcome to the RetailX Germany Ecommerce Country Report for 2022.

Like many European markets Germany was in the midst of change last year, attempting to recover from both the impact of Covid-19 but also a change in government.

In our last report the country was hopeful. The vaccination programme at that time was going well with a healthy rollout underway. Yet fast-forward and we now see that the country is looking to dump out of date vaccines later this summer as take-up hasn't been at the levels expected. This is coupled with the fact that initiatives by the new Chancellor Olaf Scholz to push this through with mandatory vaccinations have failed.

Scholz has certainly had a busy few months in office since coming to power last December after taking over from Angela Merkel. Inflation has also soared and, like customers across Europe, German consumers are facing rising costs and inflation which will impact on consumer spending in the coming months.

So what can retailers do? We see that the German consumer remains value-conscious, a trait they've long been known for. This hunger for value will be even more apparent in the coming months.

Retailers will need to ensure that they are meeting all the needs of German consumers which means understanding what, how and why they buy is more crucial than ever. Over the coming pages you will discover how they are coping and how habits are changing, and crucially what you need to do to respond.

Ian Jindal, CEO, RetailX

Contents

Country profile	3
Market context	4
Partner perspective: Tealium	6
Partner perspective: Amplitude	8
Partner perspective: Rakuten Advertising	10
Key indices	12
Online payments	13
Delivery & returns	15
Product categories	18
Consumer preferences	19
Social commerce	21
Peak trading	22
Covid-19	23
The Largest 100	25
Company spotlight: Lidl	27
Company spotlight: Saturn	28
Company spotlight: Shop Apotheke	29
Company spotlight: Zalando	30
Figures	31
Conclusion	33

Country profile

New Chancellor Olaf Scholz hasn't had an easy first few months in office

In September 2021 Germany went to the polls after the then Chancellor of the Federal Republic of Germany Angela Merkel, first elected in 2005, chose not to run again.

The results were mixed. The **Social Democratic Party of Germany (SDP) had their best result since 2005**, emerging as the largest party since 2002. The ruling CDU/CSU, which had led a grand coalition with the SDP since 2013, meanwhile recorded their worst result.

It took until **23 November**, and complex coalition talks, before an agreement was reached for a **traffic light coalition** between SPD, the Alliance 90/The Greens and the Free Democratic Party (FDP). Chancellor **Olaf Scholz**, a member of the SPD and previously vice chancellor to Angela Merkel, and his team were **elected in December**.

Scholz has had to mastermind Germany's response to the Russia/Ukraine war. In February^[1] **Germany halted the approval of Nord Stream 2**, a gas pipeline connecting Russia to Germany which was completed last September

but was waiting on its operating licence, over fears it would give Russia even more of a stranglehold over gas supplies to Europe.

He then became embroiled in a row over a **boycott of Russian energy**. Germany relies on Russia for around half of its natural gas and coal and a third of its oil^[2]. In April^[3] Chancellor Scholz said **Germany was doing all it could to wean itself off its reliance on Russia and would stop using Russian coal by the summer and oil by the end of the year**. However, he refused to put a timeline on stopping the use of Russian gas.

The task ahead is challenging given Scholz also **needs to deal with the country's response to the coronavirus and its impact on the economy**. His plans for mandatory vaccinations to improve vaccine take-up haven't been successful meaning that the **country remains under threat from Covid-19**.

[1] <https://www.bbc.com/news/world-europe-60131520>

[2] <https://www.nytimes.com/2022/03/23/business/olaf-scholz-russia-energy.html>

[3] <https://www.theguardian.com/world/2022/apr/08/germany-russian-gas-imports-olaf-scholz-boris-johnson-ukraine>

	
Germany	
Area: 357,022 km ²	
Capital: Berlin	
Currency: Euro (EUR) €	
Official language: German	
Other languages spoken: English, French	
Nationality: German	
Government: Federal parliamentary republic	
VAT: 19% Reduced VAT: 7%	

Market context

Soaring inflation is hitting German consumers hard as the energy crisis impacts the country

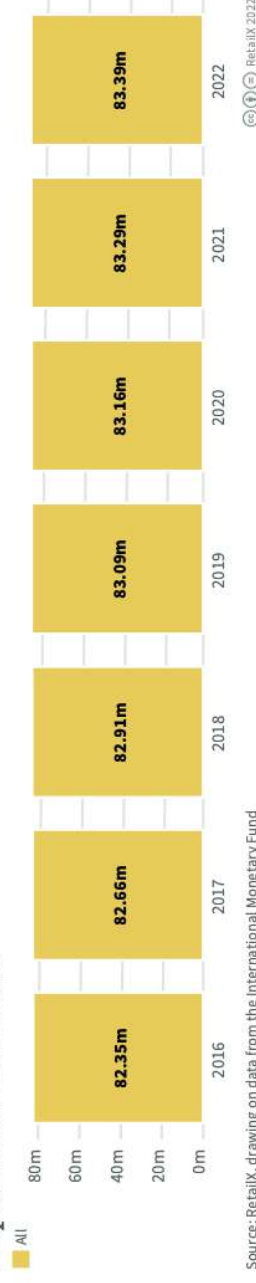
In November 2022^[1] retail sales had risen to an unexpected high in Germany, up 0.6% on the month in real terms, before further restrictions brought retailers' hopes crashing down again. **For 2021 as a whole retail sales rose 0.9% in real terms and 3.1% in nominal terms.**

The country's economy had seen some recovery, growing once again in the summer of 2021, despite increasing supply and material shortages, yet the fourth coronavirus wave and tightening restrictions – including the 2G rule in retail stores – saw things slow once more.

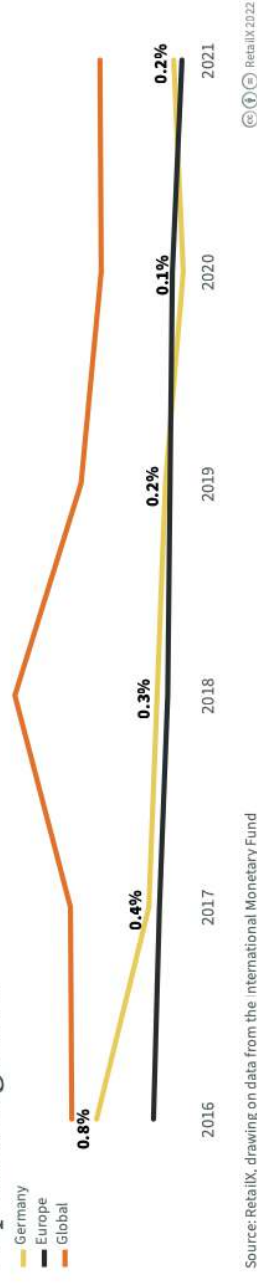
GDP was -0.3%^[2] in the fourth quarter of 2021 and +2.9% for the year as a whole. Compared to the fourth quarter of 2019, the quarter before the beginning of the pandemic, economic output in the fourth quarter of 2021 was 1.1% lower.

Inflation has soared of late. In March 2022 Germany reported its **highest level of inflation since the country was reunited**, when it hit **+7.3%^[3]**, up +2.2% on the

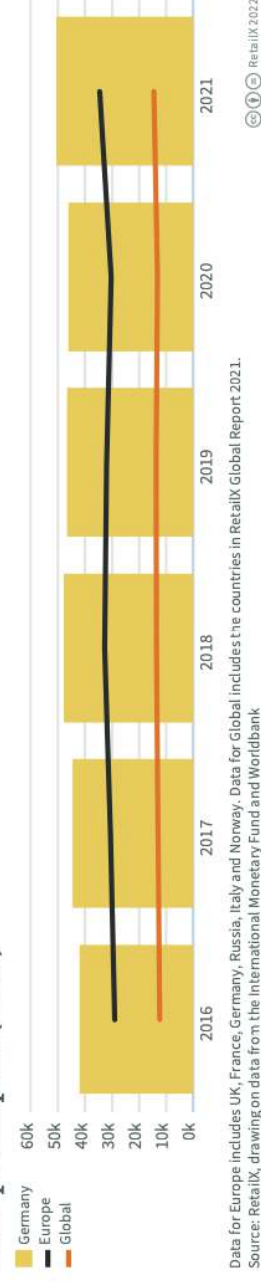
Population structure



Population growth



GDP per capita (USD)



previous month. The **last time** such high inflation levels had been seen was in autumn **1981** when **mineral oil prices had increased as a result of the first Gulf war** between Iraq and Iran.

Once again it was **international conflict driving up energy prices** to be partly to blame as the Russian war against Ukraine saw price increases for heating oil, motor fuels and natural gas, as well as some food products. **Energy prices rose 39.5% year on year.**

Delivery bottlenecks^[4], which had already slowed down the German industry in 2021, also **continue to impact the country** and the rate of inflation.

The German population remains relatively stable at just over 83 million, but **migrant workers** continue to make up a significant proportion of the German population, up **2%^[5] to 22.3 million people or 27.2%** of the German population in 2021.

[1] <https://www.msn.com/en-gb/money/other/german-retail-sales-rebound-in-november/ar-AA5pmgG>
 [2] https://www.destatis.de/DE/Themen/Wirtschaft/Volkswirtschaftliche-Gesamtrechnungen/Inlandsprodukt/_inhalt.html
 [3] https://www.destatis.de/EN/Pres/2022/04/PE22_180_611.html
 [4] https://www.destatis.de/EN/Pres/2021/12/PE21_345_421.html
 [5] https://www.destatis.de/EN/Pres/2022/04/PE22_182_125.html

Ecommerce users in Germany, 2017–2025 (in millions)

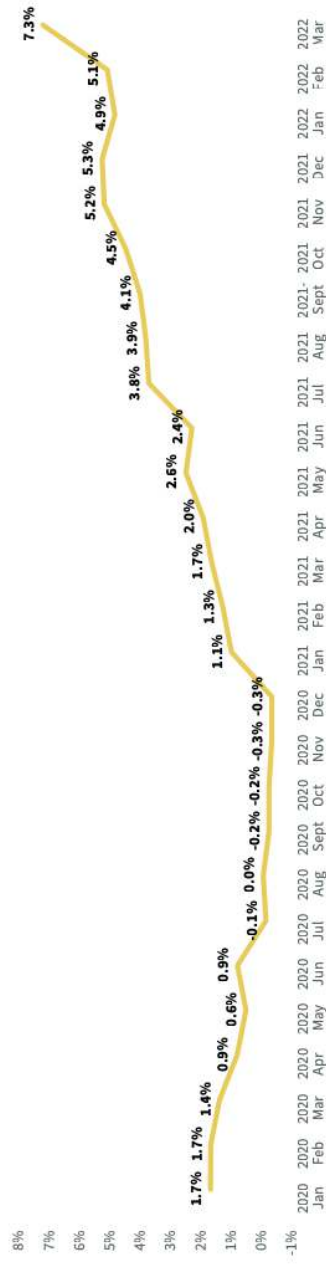


Note: The ecommerce market comprises the sale of physical goods via a digital channel to a private end consumer (B2C). This definition encompasses purchases via desktop computers as well as purchases via mobile devices. All figures are estimate. Data current as of February 2022.

Source: Statista Digital Market Outlook. Accessed via Statista

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Inflation rate in Germany, by month, 2020–2022



Note: Harmonised index of consumer prices year-on-year change. Data current as of April 2022.

Source: Statistisches Bundesamt

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Expert insight



Frank Trefzer

Managing director DACH at Tealium

German shoppers want value and convenience when shopping online, no surprise given they live in the country that spawned discounters Lidl and Aldi. Their focus on value is likely to increase given the country has recently seen record levels of inflation and consumers will be re-examining how they spend their money and where they buy.

Retailers must be on top of their game to deliver the value that German consumers will demand, accompanied by a fully integrated online and offline offer that meets all of the needs of their customers and supports their demands.

German consumers want information at their fingertips. These are customers that do their groundwork when deciding what and where to buy, so as a retailer having a clear knowledge of your customer and their behaviour is key to your business decisions and strategy.

Getting the balance between store and online

German customers are happy shopping online and have a solid logistics network that supports efficient delivery.

But the physical store still appeals too, and consumers are looking forward to the return of their pre-pandemic buying habits. However, the reality is that the balance has shifted. For many customers, the online shopping behaviours developed during the pandemic will stay.

This means it's even more important than ever that retailers and brands build trusted relationships with their customers, backed by solid customer data and proactive marketing that prevents customer churn.

The country's prominence in terms of logistics means it's natural that its consumers are increasingly concerned about the environmental impact of deliveries and want more sustainable options. Their willingness to pay for this, and to pay a substantial premium in some cases, means retailers should be seriously looking at how to improve the environmental impact of their delivery services, especially since this is a consumer who prefers delivery straight to their door.

A growing influence from social

The influence of social commerce is also on the rise, as mobile continues to grow, with an increasing number of German consumers influenced by social media when buying online. Retailers need to build a strong social presence to engage with existing and potential customers if they are to take advantage of this trend and, ideally push these consumers to either buy through social commerce on their

social media platforms, or at least buy instore or online. Customers increasingly expect the brands they love to be building relationships with them through social, as well as through all the other channels in which a retailer operates.

Cross-channel integration

Integrating information across channels to enable a single view of the customer which means that retailers or brands can engage with relevance and confidence at any point in the customer journey is essential.

Consumers don't expect a scattergun approach from the brands they engage with. They expect facts and an integrated approach. The market is evolving and as Germany continues to recover from the pandemic there will be much more change to come. Retailers need to brace themselves for this by building on their relationships with consumers, ensuring they are relevant when the German consumer does look to engage and buy.



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Expert insight



Oliver Stein

Country manager DACH, Amplience

Customer behaviour is changing again now we're starting to exit the pandemic. Many brands have closed bricks and mortar offerings. But it's not all about ecommerce – Amazon and Zalando, for example, are opening more physical stores.

The key is in connecting those experiences: the physical and the digital. People still want to order online and pick up in store, for example. And many German consumers still like to physically touch products before they buy them. The retailers who get that balance right will do extremely well.

And you need to get that experience right across every channel. Mobile is particularly important now – consumers no longer just use desktop or laptop computers to shop.

German consumers expect brands to be likeable beyond just the products and services they offer. Environmentalism is a key concern for these buyers – they engage most with brands that are conscious about issues such as sustainability and animal welfare.

The challenges ahead

A customer can come from anywhere – social selling, bricks and mortar, even TikTok. And they can be looking for anything, whether it's a brand, a product, a campaign or something else entirely. Everything you're doing needs to be joined up.

The German market is fiercely competitive and brands need to know exactly what consumers are looking for.

Due to the current political and economic situation in the world, demand will outpace supply and delivery possibilities. Transparency is important to German shoppers, so you need to manage expectations and be upfront about what you're offering.

As customers want to shop at any time and anywhere, ecommerce is continuing its shift to mobile devices. To accommodate that behaviour, German brands need to invest more into their mobile offerings. The mobile and native app market space in Germany is still dominated by international brands such as Amazon.

How your brand can adapt right now

Make sure your commerce experience goes beyond the sale. You must take the post-sale experience seriously. German consumers expect to be able to return purchases with ease. If the return experience is bad, the customer is unlikely to ever come back.

German shoppers don't like to share their data. Privacy is more important in Germany than in almost any other region in the world. So it's an expectation that during the process you also show you're focusing on their privacy. This makes it far more difficult to deliver tailored messages and personalised experiences.

This is why your overall brand experience is essential. Your brand image is just as important as your product, and your content campaigns need to reflect that. Make sure you have a clear brand message across all channels.

The customer experience you offer needs to be easy to follow. Complicated shopping walkthroughs aren't going to cut it. Improving functionality on mobile can go a long way towards attracting and retaining German shoppers. And it will give you an advantage over the competition.



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Expert insight



Stefan Bernauer

Country manager, DACH,
Rakuten Advertising

Covid measures such as lockdowns moved customers from physical shops to their home, and consequently boosted the business of online retailers. As restrictions eased but concerns about new Covid-19 variants remained, this trend continued.

There is no doubt that the shift towards online shopping is clear and consistent and, seemingly, now firmly established. Here in Germany, we expect a significant proportion of consumers to permanently make a greater proportion of their purchases online due to new behaviours that have emerged since the pandemic. Customers now have an “online-first” mentality, which brings new challenges and emerging trends that need to be addressed.

Now that the first barriers such as setting up online accounts, providing payment details, and gaining trust have been overcome, retail is facing a new era. Consumers are increasingly turning their backs on stationary retail and buying online instead, not least because of the greater

choice. In the virtual market, almost 450,000 online retailers compete in Germany and Austria alone, and more are added every year.

In Rakuten Advertising's German affiliate network, sales grew 53% year-on-year between 1st and 24th December 2021, following a 90% increase in 2020 over the same period. This confirms that the pandemic-related shopping behaviour of Germans is becoming more solidified. Studies show that due to the impact of Covid-19, sales of non-food products worth \$632 billion will shift to the internet by 2025.

Influencers we trust

The number of consumers who want to discover and buy products via social media has recently increased significantly - especially among generations such as Millennials and Gen Z. Visual content leads to an even more engaging shopping experience and social commerce allows consumers to find everything bundled in one place, from the initial inspiration to the final purchase.

Customers are relying more on ratings and reviews to make choices among the sheer volume of products and online shops - and this is where influencers enter the picture. The influencer marketing market is experiencing a real upswing. In 2021, the industry was worth \$13.8 billion and grew by \$4.1 billion compared to the previous year.

Retailers and brands must collaborate with the new “stars and starlets” of the internet to engage with their audiences.

Customising marketing messages to specific audiences and products can help build trust and familiarity, allowing online retailers to incrementally increase sales without appearing pushy or obnoxious.

Going green

Covid-19 is not the only factor changing consumer attitudes. Reducing the impact of all humanity on the environment has become a major priority for shoppers around the world. Awareness of the impact of consumption is a key feature of these changing consumer habits. Many brands benefited from the increasing demand for second-hand goods and thus the so-called recommerce (reverse commerce). The demand in the second-hand market has increased significantly worldwide in recent years.

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Market overview: international indices

Germany leads on its logistics infrastructure but when it comes to relevance the country doesn't perform so well

The international indices allow the comparison of the performance of countries in measures ranging from logistics to doing business.

Within the key four indices we measure in these reports, **Germany sits in the top quartile overall**. But it's the country's logistics network that sets it apart. **Germany leads the Logistics Performance Index** global ranking and ranks **second in the Integrated Index for Postal Development**. Germans are confident online shoppers with a trusted delivery network at their fingertips.

When it comes to the ease of doing business and the E-Government Development Index the country sits at the further extreme of the first quartile.

The country is within the top quartile of the Internet Inclusive Index – just – where it has an overall score of 25. **Germany scores highly for Readiness** where it ranks 12th for its capacity and skills to access the internet. However, it is **let down by Relevance** where it sits in 60th place.

Indices	Definition	Global Rank
Logistics Performance Index	LPI measures performance along the logistics supply chain within a country	1 /160
Ease of Doing Business Index	A high Ease of Doing Business ranking means the regulatory environment is more conducive to the starting and operation of a local firm	22 /190
E-Government Development Index	The E-government Development Index measures the willingness and capacity of national administrations to use information and communication technologies in order to deliver public services	25 /193
Integrated Index for Postal Development (2IPD)	2IPD is a comparative indicator of postal development around the world which built on four pillars: reliability, reach, relevance and resilience	2 /170
Internet Inclusive Index		
Availability	Quality and breadth of available infrastructure required for access and levels of internet usage	20 /120
Affordability	Cost of access relative to income and the level of competition in the internet marketplace	22 /120
Relevance	Existence and extent of local language content and relevant content	60 /120
Readiness	Capacity to access the internet, including skills, cultural acceptance and supporting policy	12 /120
Overall Internet Inclusive Index		25 /120

KEY: ■ Top quartile ■ Second quartile ■ Third quartile ■ Bottom quartile

Payment methods

German consumers continue to adopt a wider range of payment methods with digital wallets growing strongly

Germany's payment market has **previously been dominated by open invoicing** to pay for goods, allowing customers to order, receive and review their goods before they make payment, usually by bank transfer. It's effectively a buy now, pay later option.

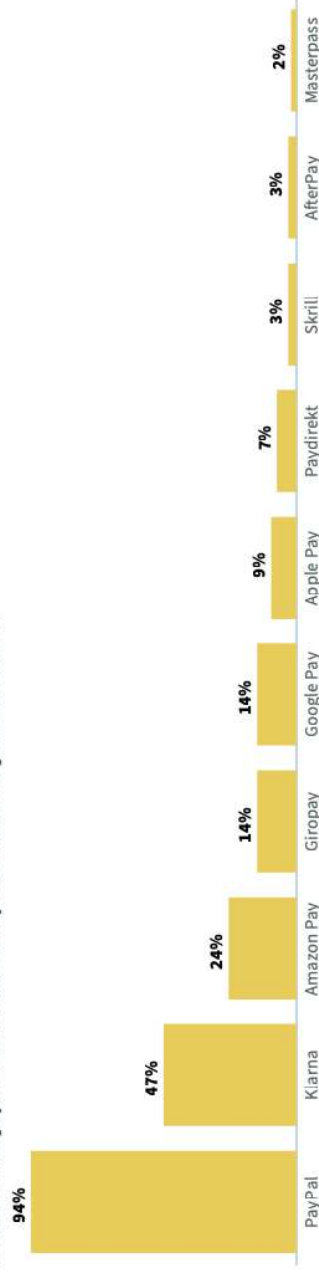
The continuing dominance of invoice/installment and cash on delivery among the top 500 online stores in Germany shows that the sentiment to purchase and pay at a later date remains.

Debit cards have been less popular since the country's major debit card Girocard, which has more than 100 million cards in circulation, previously didn't work online.

It is used by around 95% of all Germans aged 16 to 69, compared to around 43 million credit and debit cards from Visa and Mastercard.

However, **since July 2021^[1] Sparkasse customers who are also Apple users can use their Sparkassen Girocard in the Apple Pay wallet** to pay online.

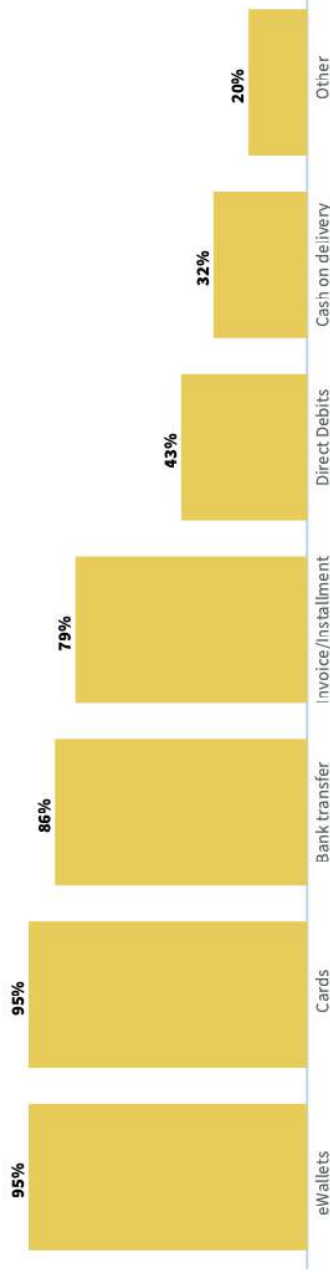
Most used online payment brands in Germany, 2021
Which online payment services have you used in the past 12 months?



Note: 2,547 online respondents in Germany; who used online payment methods. More than one answer possible. Data updated to November 2021.
Source: Statista Global Consumer Survey

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Payment methods most offered by the top 500 German online stores, 2021



Note: Based on the top 500 online stores by net sales in Germany in 2020 for which payment information is available. Stores may offer more than one payment method. Data updated to October 2021.
Source: ecommerceDB

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Today digital wallets rank as the strongest payment methods for consumers, with PayPal dominating the market. **94% of German consumers have used PayPal** to pay online in the last 12 months.

Klarna is the second most popular digital wallet option at 47%. The company partnered with eBay in March ^[2] to offer German shoppers more flexible payment options, including Buy Now Pay Later (essentially payment on invoice) and Financing (the ability to spread payments over a period of time) giving customers added ways to pay beyond its Pay Now service.

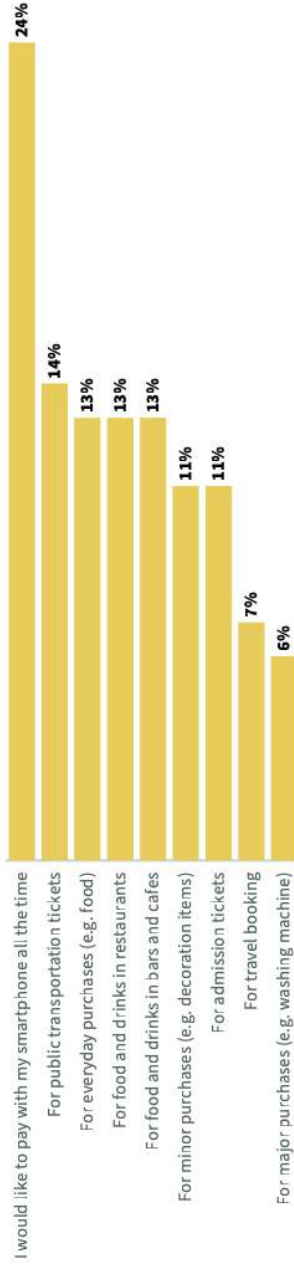
PayPal also dominates mobile payments, followed by Apple Pay and then Google Pay. Nearly one in four (24%) of German consumers say they would like to be able to pay for goods or services with their smartphone all the time.

[1] <https://computop.com/payment-insights/en/e-commerce-en/g/ncard/>

[2] <https://www.pymnts.com/buy-now-pay-later/2022/klarna-offers-bnpl-to-german-clay-shoppers/>

Where consumers would like to use mobile payments in Germany, 2021

In what situations would you like to be able to pay with your smartphone (without debit/credit card or cash)?



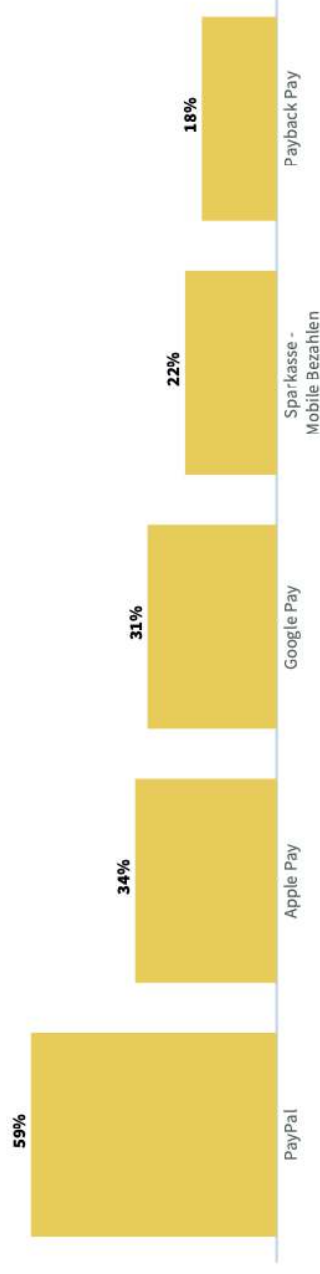
Note: 3,578 online respondents in Germany. Recorded based on "Payments at points of sale by type". Data updated to November 2021.

Source: Statista Global Consumer Survey

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Most used mobile payment brands in Germany, 2021

Which of these services have you used in the past 12 months to pay in stores, restaurants, or other points of sale with your smartphone?



Note: 415 online respondents from Germany, who used mobile payment in the past 12 months. More than one answer possible. Data updated to November 2021.

Source: Statista Global Consumer Survey

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Delivery & returns

The appetite for convenient and sustainable delivery, collection and returns is growing

German consumers have a **high preference for home delivery with a signature** required, with more than half (52%) of them preferring this method of delivery. They **want certainty and proof of delivery**. This is followed by just under a third (32%) who are happy with home delivery without signature.

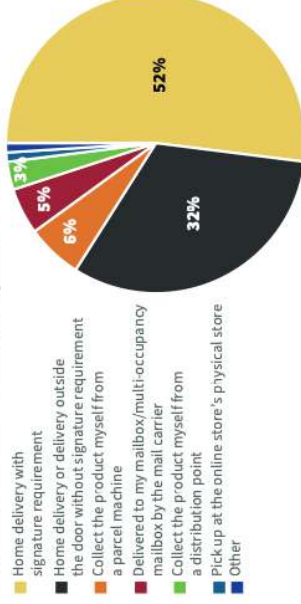
Click and collect is less popular for German consumers, with only 6% willing to collect from a parcel locker and even less from a store or distribution point.

Only a quarter of the top 500 German online stores offer click and collect as a shipping service to their consumers.

This isn't a surprise when we remember that Germany leads in the logistics index that began our report. **DHL dominates the market in terms of delivery**, used by 81% of the top 500 German online stores.

German consumers are **more concerned about the cost of delivery** (55%) than they are about speed. Almost

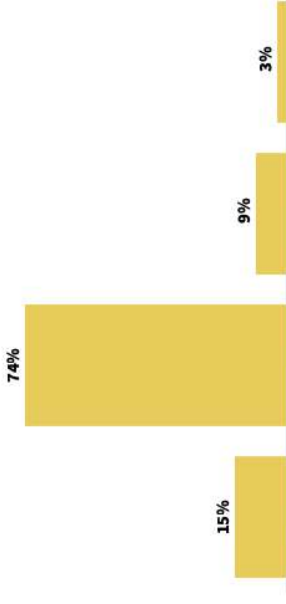
Preferred online shopping delivery methods in Germany, 2021



Note: Approx. 1,000 respondents; 15-79 years; Germany residents who have shopped online. Online interview conducted in 2020 and 2021. Source: PostNord

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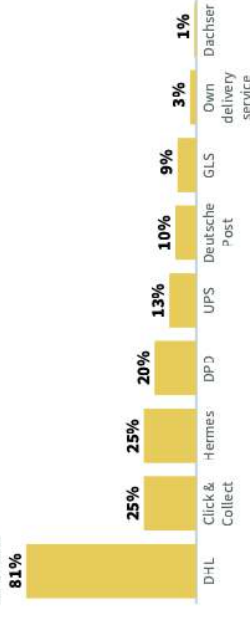
Ecommerce consumer expectations of delivery time in Germany, 2021



Source: PostNord

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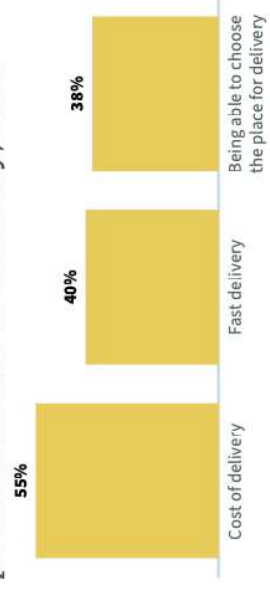
Most used shipping service providers by the top 500 German online stores, 2021



Note: Based on 89% of the top 500 online stores by net sales in Germany in 2020 for which shipping information is available. Stores may work with more than one shipping service provider. Data updated to October 2021. Source: ecommerceDB

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Importance of delivery related characteristics when ordering products online in Germany, 2021



Note: Approx. 1,000 respondents; 15-79 years; Germany residents who have shopped online. Online interview conducted in 2020 and 2021. Source: PostNord

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three-quarters (74%) expect deliveries within three to five days, compared to only 15% who expect delivery in one to two days.

But tolerance for longer deliveries, of six days or more, is less than in other European countries at only 9%.

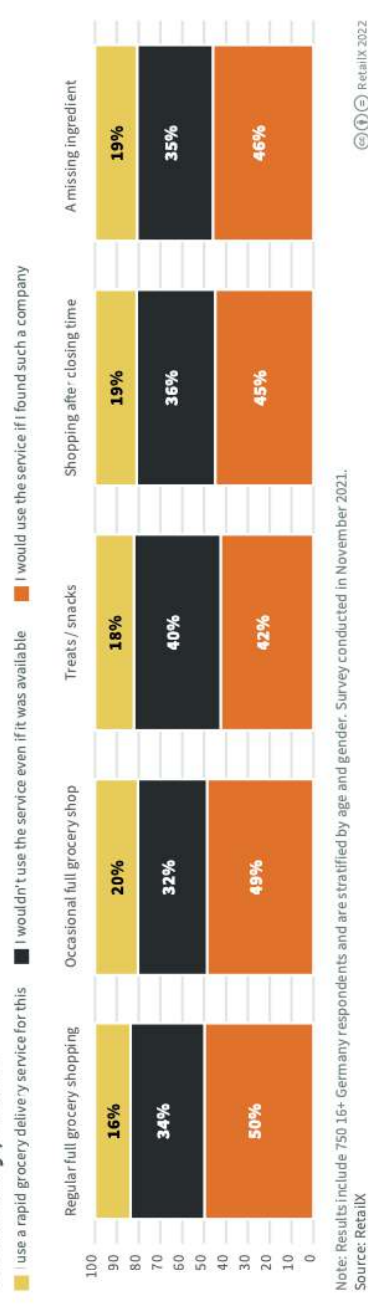
That said the **rapid grocery delivery market of store to door in ten minutes or less is growing** in Germany. **Gorillas** is one rapid delivery start-up that **debuted in Berlin during the pandemic** in June 2020 and has since expanded into the UK, France and the Netherlands. It recently launched its latest funding drive^[1].

One in five (20%) of German consumers will use rapid grocery delivery services for their occasional full grocery shop, while similar amounts will use it for convenience, for instance after stores have closed or if missing an ingredient (both 19%).

Just under half of consumers say they would use it if they found such a company, showing there is big demand among German consumers for the rapid delivery as awareness and spread of such services grows.

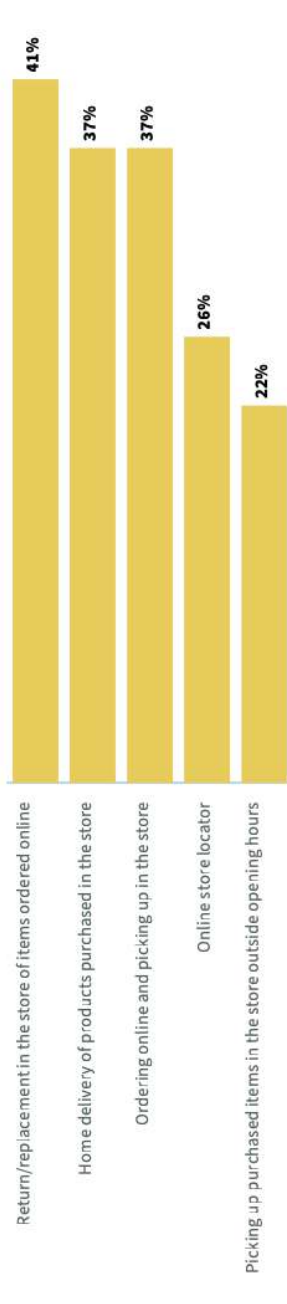
But the country also has one of the **highest product returns rates in Europe, particularly in fashion and shoes**, thanks to its mail order and open invoice heritage.

Consumer willingness to use rapid 10 minute grocery delivery services in Germany, 2021



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Delivery and returns services that German consumers would like to use, 2021



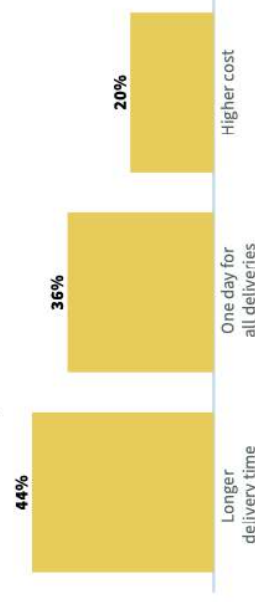
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41% of German consumers would like to be able to return or replace items instore that are bought online with consumers saying that better product descriptions (39%) or better images (27%) would encourage them to return less.

Sustainability is an issue too. **14% say that sustainability would drive them to return less and a third (32%) say that they would pay extra for eco-delivery**, second only to Italy^[2].

While 40% consumers say they would pay up to 20% more for eco-delivery **one in four say they would pay 50% or more**. 44% would accept longer delivery times to make their deliveries more sustainable.

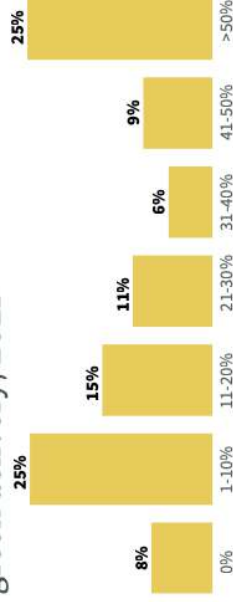
Options that German consumers would consider to make their delivery more sustainable, 2021



Note: Results include 1000 16+ Germany respondents and are stratified by age and gender. Respondents could select multiple answers. Survey conducted in January 2021.
Source: Retailix

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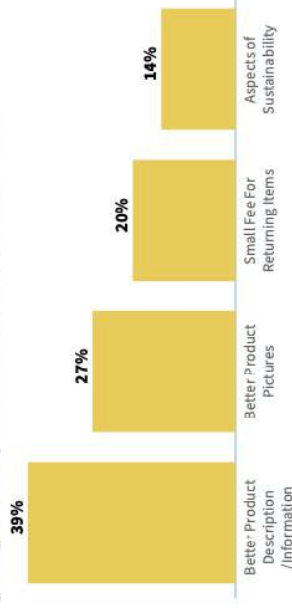
The premium as a percentage of product cost that German consumers are willing to pay for carbon neutral or green delivery, 2021



Note: Results include 1000 16+ Germany respondents and are stratified by age and gender. Survey conducted in January 2021.
Source: Retailix

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What would help to reduce consumer propensity to return items, 2021

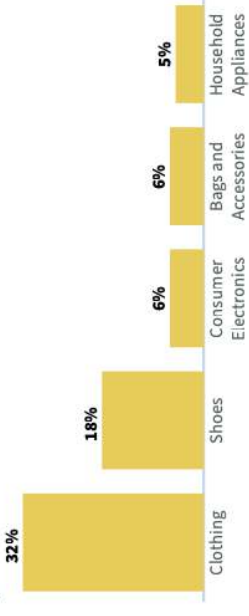


Note: Results include 1000 16+ Germany respondents and are stratified by age and gender. Survey conducted in January 2021.
Source: Retailix

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Online shopping returns in Germany, by category, 2021

Which of these have you sent back after an online order in the past 12 months?



Note: 2,522 online respondents in Germany; who shop online. More than one answer possible. Data updated to October 2021.
Source: Statista Global Consumer Survey

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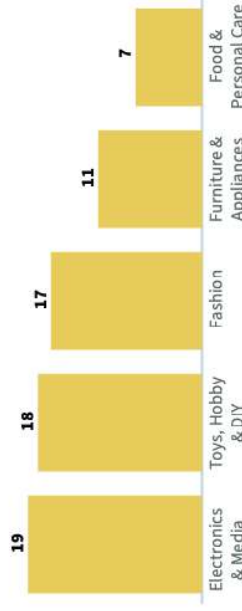
[1] <https://www.thetimes.co.uk/article/gorillas-rapid-delivery-app-set-for-4th-value-in-funding-deals-fmvd59n>
[2] <https://www.directlink.com/varying-willingness-to-pay-for-sustainable-e-commerce-delivery>

Product categories

When it comes to individual product categories it's clothing that dominates both interest and spend

Consumer interest is strongest in clothing, shoes, food and drink and consumer electronics. However, in terms of purchases it's clothing, shoes, media and consumer electronics that are most bought by German shoppers online. This is reflected in the sales of the top 500 online stores, where electronics and media dominate online sales.

Ecommerce net sales of the top 500 online stores in Germany, by category, 2021 (in billion USD)



Note: The top 500 online stores by net sales in Germany in 2020 for which information is available and known. Data updated to October 2021.

Source: ecommerceDB

Interest of online shoppers in Germany, by category, 2021

Which of these products and services are you interested in?



Note: 2,522 online respondents in Germany, who shop online. More than one answer possible. Data updated to October 2021.

Source: Statista Global Consumer Survey

Purchases of online shoppers in Germany, by category, 2021

Which of these items have you bought online in the past 12 months?



Note: 2,522 online respondents in Germany, who shop online. More than one answer possible. Data updated to October 2021.

Source: Statista Global Consumer Survey

The German consumer in focus

Value-driven shoppers who are increasingly interested in the environment are an important part of Germany's consumer profile

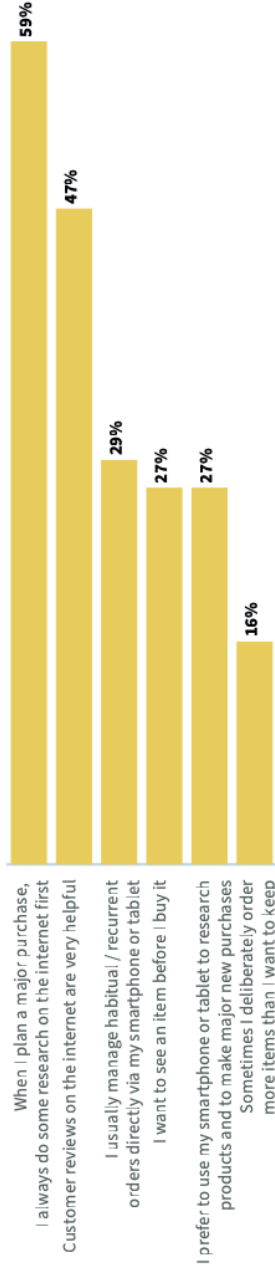
Mobile shopping continues to increase in prevalence with **58% of shoppers buying online via their smartphone** in the past 12 months. Add in laptop users (53%) and tablet users (29%) and we see that German consumers are **less tied to their desks when buying online** than in the past. In fact, only just over a third (35%) of online shopping is now done via desktop.

Convenience dominates in terms of why German consumers purchase online. For nearly two-thirds (65%) it's the **availability of direct delivery to home which tops their drivers of purchase** online. For 60% it's about the 24/7 accessibility of products that online shopping allows.

The German consumer remains a **conscientious, value-driven shopper**. More than two-thirds (68%) will keep an eye out for special offers when shopping.

Attitudes towards online shopping in Germany, 2021

Which of these statements about online shopping do you agree with?

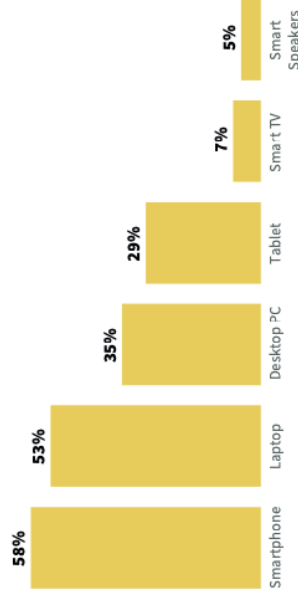


Note: 3,577 online respondents in Germany. More than one answer possible. Data updated to November 2021.

Source: Statista Global Consumer Survey

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Devices used for online shopping in Germany, 2021 in the past 12 months

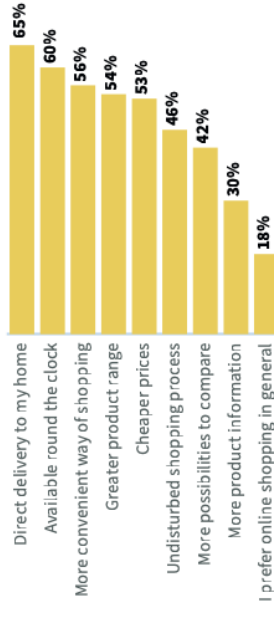


Note: 2,522 online respondents in Germany who shop online. More than one answer possible. Data updated to October 2021.

Source: Statista Global Consumer Survey

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Drivers of online purchase in Germany, 2021



Note: Survey conducted during 2021. Survey includes 3577 German residents. Multiple answers were possible. Data current as of November 2021.

Source: Statista Global Consumer Survey.

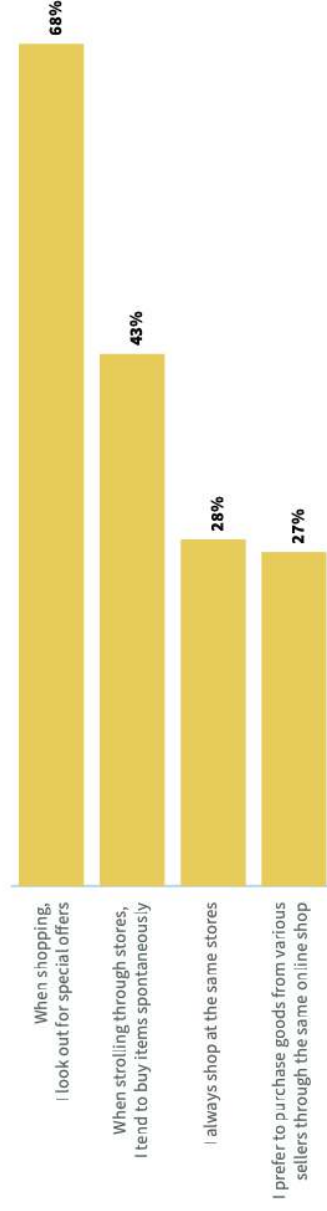
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And they do their research. 59% will research on the internet when planning a major purchase and just under half (47%) find customer reviews helpful when they are looking for information on prospective purchases. But purchases aren't always thoroughly researched. Just under half (43%) admit to impulse buying too.

What is evident in this year's report is a **growing concern among German shoppers for sustainability** when shopping online. It's part of a wider European trend among consumers for more sustainable delivery options as consumers take more notice of their impact on the environment. Just under a third (32%) are willing to pay an extra three euros for a more eco-friendly delivery.

It's of little surprise when you look at consumer concerns among Germans. **Climate change (39%) and the environment (37%) are among the top three concerns** for German shoppers. And their hunger for value is further supported by the fact that 35% see rising prices and the cost of living as a challenge for the country. Concerns will have increased this year after the country hit its highest rate of inflation since 1981 in March.

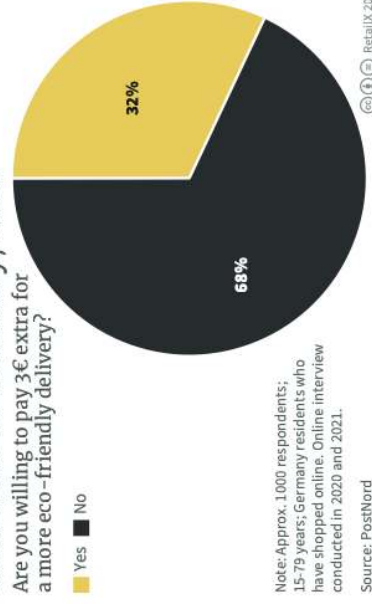
Attitudes towards shopping in Germany, 2021



Note: 3,577 online respondents in Germany. More than one answer possible. Data updated to November 2021.
Source: Statista Global Consumer Survey

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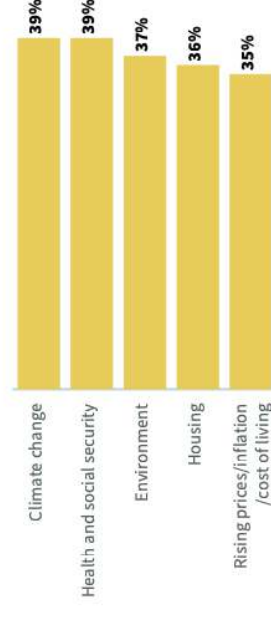
Willingness to pay more for sustainable deliveries in Germany, 2021



Note: Approx. 1,000 respondents; 15-79 years; Germany residents who have shopped online. Online interview conducted in 2020 and 2021.
Source: PostNord

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Top 5 perceived challenges for the country, 2021



Note: 2,1479 online respondents from Germany. More than one answer possible. Data updated to November 2021.
Source: Statista Global Consumer Survey

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Social commerce

The influence of social commerce is of increasing importance for German retailers as consumers become more mobile

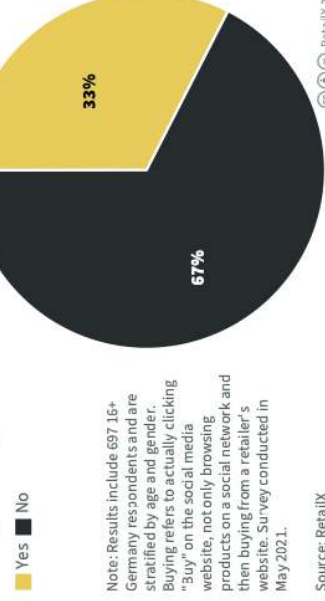
A third of German consumers have bought on social media sites such as Facebook, Instagram and Snapchat. And it's driving further interest in the potential of such platforms for shopping.

Certainly retailers can't ignore the impact of social commerce on consumer buying patterns. **86% of German consumers admit to being influenced to buy** something after they've seen it on social media platforms including TikTok, YouTube, Facebook, Instagram and Snapchat.

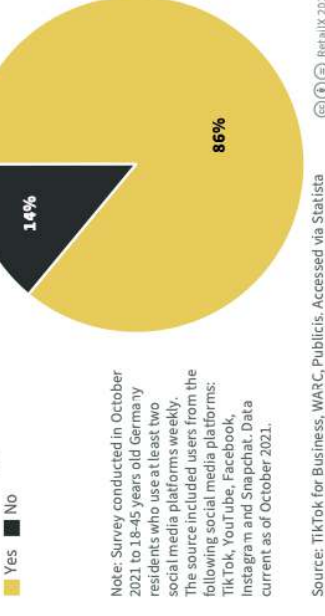
It means German retailers know that they need a social media presence. **95% of German retailers have a Facebook presence** but only three-quarters have a presence on Instagram.

Yet, in another survey, we see that Instagram is driving the highest level of shopping engagement with **more than a third (36%) of German consumers shopping via Instagram** compared to a quarter (25%) via Facebook.

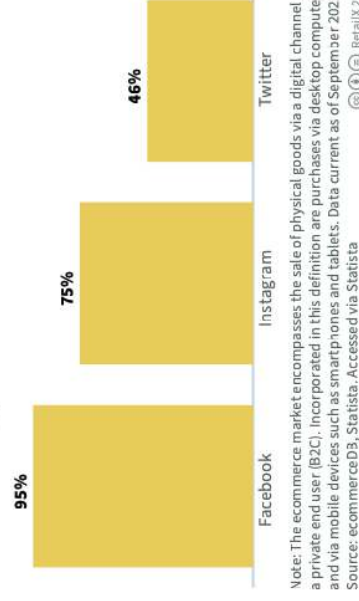
Share of consumers that buy on social media sites (e.g. Facebook, Instagram, Snapchat)



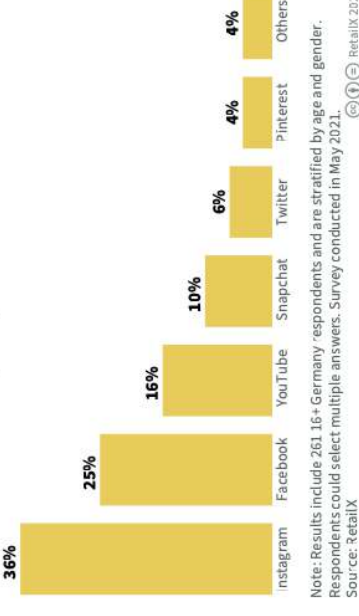
Consumers who bought something after seeing it on social media in Germany, 2021



Social media presence of online stores in Germany, 2021



Social media platforms that German consumers shop on, 2021



Peak trading

Christmas 2021 started well but with infections rising Covid-19 impacted business yet again

Peak trading in Germany in 2021 was **again impacted by Covid-19**. In 2021 stores stayed open but were subject to the 2G rule, which meant that **only the vaccinated and recovered were allowed instore**.

We can see that between 2019 and 2021 the preference to **buy online has almost doubled** while the preference to buy Christmas presents at local retailers has dropped over the two years, most likely due to the Covid-19 risk.

At the beginning of November^[1] German retailers said they **expected Christmas sales to rise 2% to 111.7 billion euros**. **Online sales were expected to grow by 17.3% to 23.1 billion euros**.

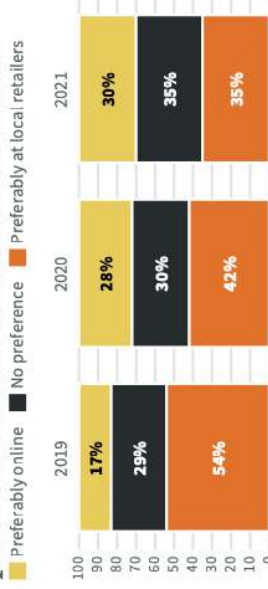
But within a week or two the continuing surge of infections had meant the introduction of the 2G rule and a survey by the HDE^[3] found that only **20% of 350 companies were satisfied with their Christmas sales to date**.

[1] <https://www.reuters.com/business/retail-consumer/german-retailers-optimistic-about-christmas-sales-2021-11-06/>

[2] <https://www.reuters.com/en-gb/money/other/german-retail-sales-rebound-in-november/ar-MSpmg>

[3] <https://www.reuters.com/world/europe/german-retail-suffers-start-crucial-christmas-season-2021-11-28/>

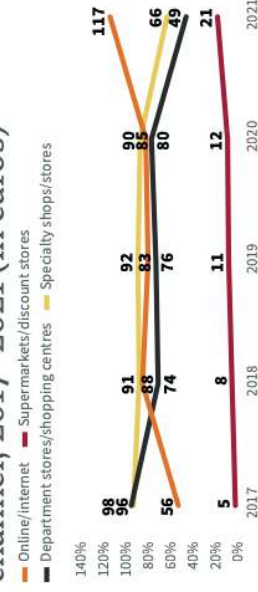
Consumer preference to buy Christmas presents online or at local retailers



Note: Survey conducted between 2019 and 2021. Survey includes telephone interviews to 1000 18+ years old Germany residents. The number of respondents may vary each year. Data current as of November 2021.
Source: EY. Accessed via Statista

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Anticipated spending on Christmas gifts in Germany, by retail sales channel, 2017-2021 (in euros)



Note: Survey conducted between 2017 and 2021. Survey includes telephone interviews to 1000 18+ years old Germany residents. The number of respondents may vary each year. Data current as of November 2021.
Source: EY. Accessed via Statista

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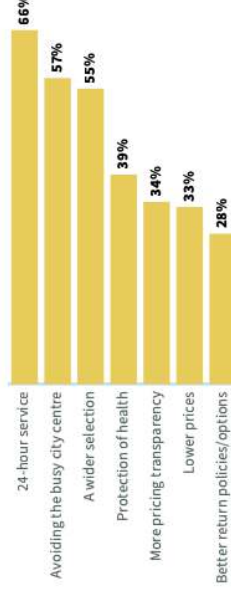
Online revenue from Christmas season sales in Germany, 2017-2021 (in billion euros)



Note: Results include revenue generated from online retail sales during the Christmas trading period. Results exclude sales tax. Data current as of November 2021.
Source: HDE, IHI Köln. Accessed via Statista

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Advantages that German consumers see when doing Christmas shopping online



Note: Survey conducted during November 2021. Survey includes telephone interviews to 1500 18+ years old Germany residents who prefer online shopping. Multiple answers were possible. Data current as of November 2021.
Source: EY. Accessed via Statista

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Covid-19

Germany has worked hard to combat the threat of Covid-19 yet vaccine take-up is low compared to other countries

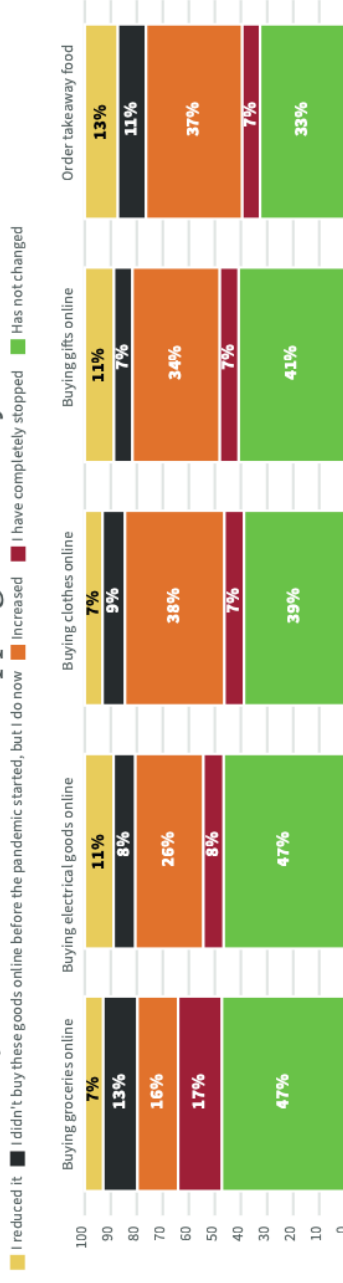
Germany continues to take the threat of Covid-19 seriously. At the time of writing (April), health minister Karl Lauterbach said he would **not yet end mandatory isolation**⁽¹⁾ for those who caught the virus.

He had previously suggested switching to a voluntary five-day period of isolation, similar to the UK, but his U-turn came as he revealed that **more than 300 people a day were still dying** from the virus.

More than 22 million total cases have been reported in Germany since the start of the pandemic, with **130,708 deaths by April 2022**.

Yet **vaccine take-up remains behind target** and the country may have to dump 3 million doses of the vaccine⁽²⁾ that expire in June. Only around **76.6% of the population has received at least one dose** of the vaccine, compared to more than 80% in other Western European countries such as France, Italy and Spain.

How COVID-19 has affected online shopping in Germany

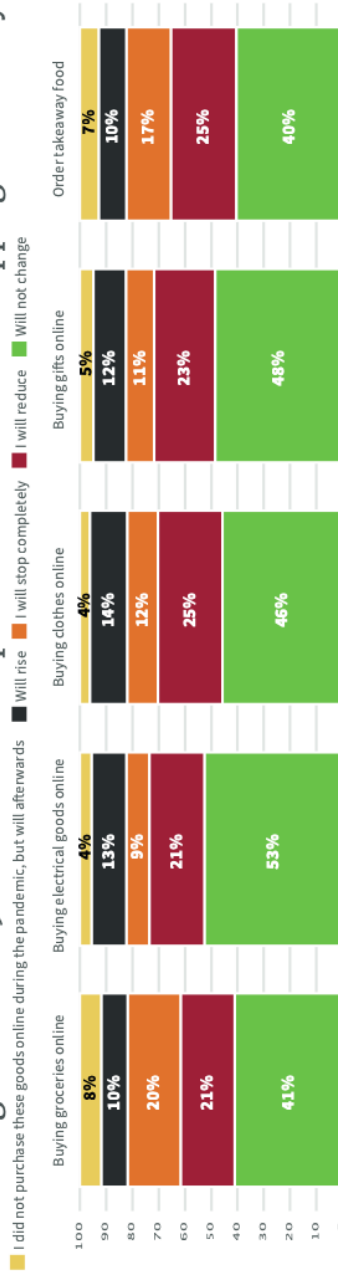


Note: Results include 697 16+ Germany respondents and are stratified by age and gender. Survey conducted in May 2021.

Source: RetailIX

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How lifting of COVID-19 restrictions is expected to affect online shopping in Germany



Note: Results include 697 16+ Germany respondents and are stratified by age and gender. Survey conducted in May 2021.

Source: RetailIX

© RetailIX 2022

Meanwhile, a **Covid-19 vaccine mandate**^[3] requiring citizens aged 60 and over to be vaccinated from October has been voted against. The plans had been led by German Chancellor Olaf Scholz who had also previously proposed mandatory vaccinations for anyone over 18 years of age.

In late November Germany launched a **strict 2G rule** which meant that only the vaccinated or recovered could enter non-essential retail stores. The Germany Retail Association (HDE) estimated it could mean a 5.5 billion Euros^[4] drop in sales over the Christmas period.

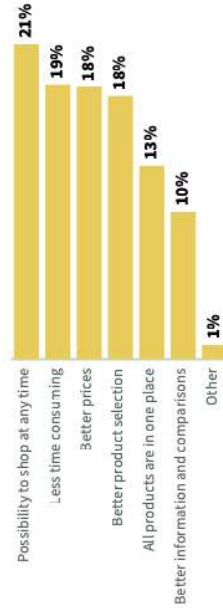
[1] <https://uk.news.yahoo.com/germany-drops-plan-relax-covid-054527585.html>

[2] <https://www.reuters.com/world/europe/some-3-min-covid-vaccine-doses-expire-germany-by-end-june-2022-04-11/>

[3] <https://www.reuters.com/world/europe/german-parliament-rejects-mandatory-vaccines-blow-scholz-2022-04-07/>

[4] <https://gourma.com/2021/12/06/2g-rule-in-retail-fears-about-the-christmas-business/>

Which of the following are the main reasons why you will continue to shop online after the pandemic?

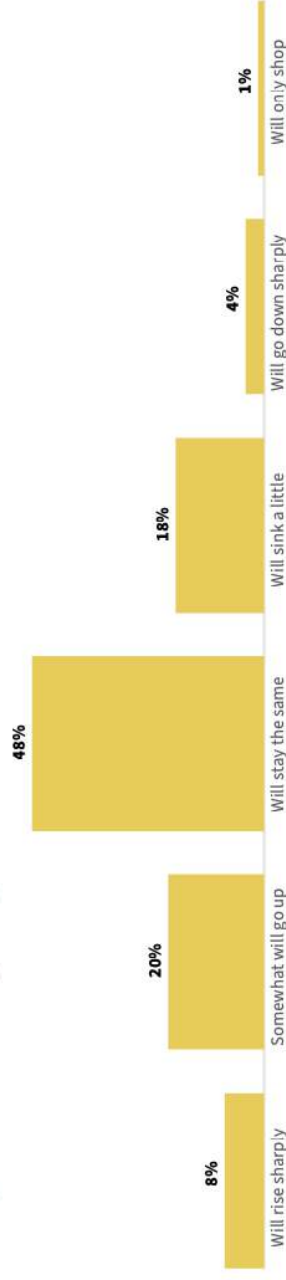


Note: Results include 697 16+ Germany respondents and are stratified by age and gender. Respondents could select multiple answers. Survey conducted in May 2021.

Source: Retailix

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Predicted online shopping levels post-pandemic compared to during the pandemic

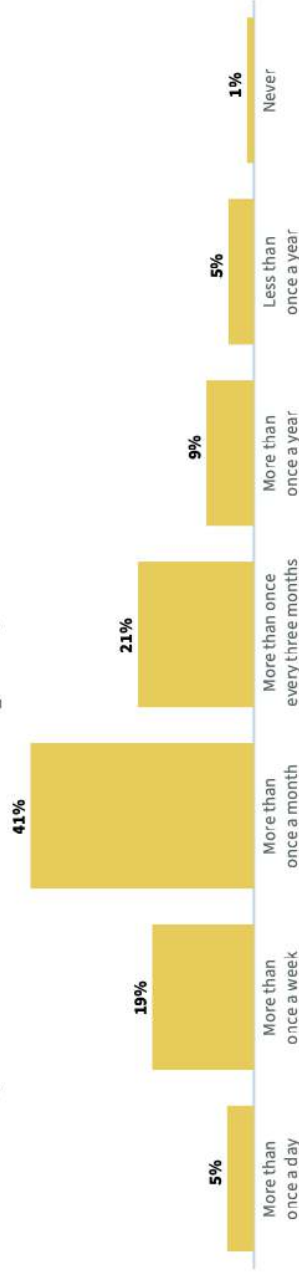


Note: Results include 697 16+ Germany respondents and are stratified by age and gender. Survey conducted in May 2021.

Source: Retailix

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How often consumers will shop online once all pandemic health measures have been lifted (i.e. no restrictions are in place)



Note: Results include 697 16+ Germany respondents and are stratified by age and gender.

Source: Retailix

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The Largest 100

What does RetailIX data say about the largest 100 online retailers in Germany?

In our country reports when we look at the Largest 100 retailers in a country it offers a useful insight into the demands and habits of consumers in that market. The **Largest 100 represents the retailers that command the biggest share of the ecommerce market by consumer web traffic** and provides useful guidance for other retailers and brands that are operating in the market already or looking to exploit opportunities.

Germany's shopping behaviour is **dominated by marketplaces such as Amazon**. German consumers love a marketplace, most likely thanks to their associated fondness for value since marketplaces like Amazon offer both range and value.

It's no surprise then that our RetailIX researchers, who worked with SimilarWeb to examine customer visits to the Largest 100 websites in the German market, found that **multi-sector retail dominates with an 88% share of web traffic**.

Web traffic by sector

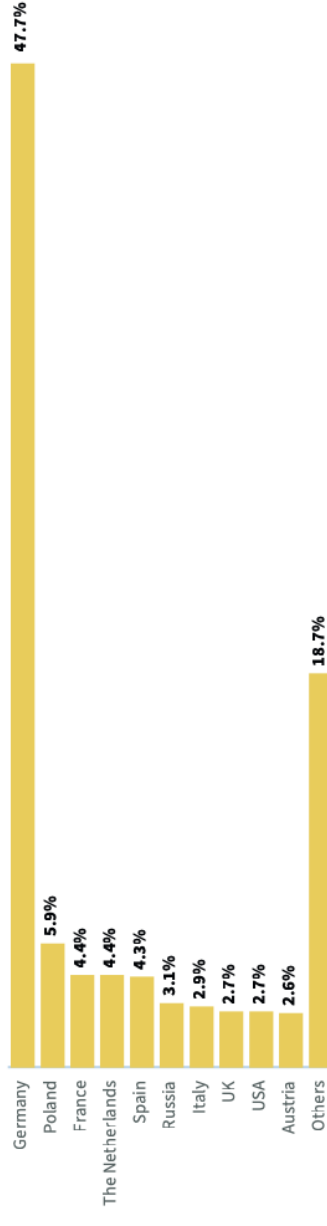
Percentage of web visits to the Germany Largest 100 retailers by German consumers, by sector



Note: The number of retailers for each category is shown in parentheses. A retailer can fall into multiple categories. Data based on 99.0% of the Largest 100.
Source: RetailIX, drawing on data from SimilarWeb

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Countries from which shoppers visit the Germany-based Largest 100



Note: There are 55 Germany-based retailers among the Germany Largest 100. The Largest 100 are selected based on German consumer web traffic. Data based on 99.0% of the Largest 100.
Source: RetailIX, drawing on data from SimilarWeb

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Amazon is doing everything to hold on to its customers in Germany. Expansion continues apace with the company creating 6,000 new jobs in Germany this year alone. By the end of 2022, Amazon will employ around 36,000 staff at more than 100 locations in the country. The company invested more than 36.5 billion euros between 2010 and 2020 and more than 9 billion euros in 2020 alone.

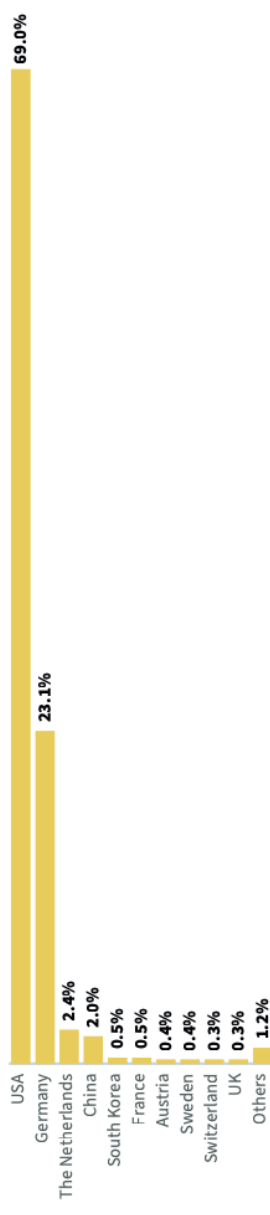
But the marketplace is important for German sellers too. More than 40,000 SMEs sell on Amazon in Germany, achieving an export turnover of 3.75 billion euros in 2020 alone.

We see that Germany dominates the countries from which shoppers visited the Germany-based Largest 100. There are 55 Germany-based retailers in the Germany Largest 100.

Just under half (47%) of the traffic to the Largest 100 comes from Germany, followed by Poland, France, The Netherlands and Spain. This is little surprise when you consider some of the retail giants that have been founded in Germany, from the likes of Zalando to Lidl and Aldi.

More than half (55%) of Germany's Largest 100 retailers have a base in Germany, followed by 16% for the US and showing the importance of having a localised approach in the market.

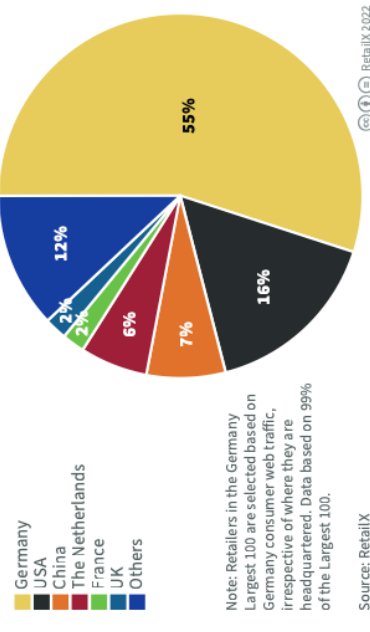
German web traffic to the Germany Largest 100 retailers, by country of retailer headquarters



Note: Retailers in the Germany's 100 largest retailers are selected based on German consumer web traffic. Data based on 99.0% of the Largest 100.
Source: RetailIX, drawing on data from SimilarWeb

However, when it comes to the amount of web traffic to the Germany Largest 100 by their headquarter country, it's the US that leads with a share of 69% of the total traffic. This is thanks to the dominance of marketplaces such as Amazon and eBay which, although they run localised sites in the country itself, are actually headquartered in the US. This is followed by just under a quarter (23%) in Germany.

Countries where the Germany Largest 100 retailers are based



Note: Retailers in the Germany Largest 100 are selected based on German consumer web traffic, irrespective of where they are headquartered. Data based on 99% of the Largest 100.

Source: RetailIX

LIDL

Company: Lidl

Headquartered: Baden-Württemberg, Germany

Founded: 1973 (first store)

Online: www.lidl.de



Discounter giant

Lidl continues to hold off online grocery

From the opening of its **first branch in Ludwigshafen-Mundenheim in 1973**, Lidl is now one of the leading companies in the German food sector and in Europe.

In Germany the company operates more than **3,200 stores** from **39 logistics centres**, employing more than 91,000 staff.

Internationally it has **around 11,550 stores and 200 distribution centres in 32 countries** employing 341,000 staff. It is part of the Schwarz Group, which also operates the hypermarket chain Kaufland.

The discounter focuses on the essential, with a Lidl pledge of quality and freshness and the tagline '**Big on quality, Lidl on price**'. Ranges include own private label and well-known branded goods in both food and non-food.

The company was initially launched as a fruit wholesaler but was developed by Josef Schwarz into a general food wholesaler from the 1930s onwards. In 1973 the first Lidl



Lidl's online offering features technology, multimedia and fashion, but not food

discount store opened. Within four years it had expanded to more than 30 stores. **International expansion included the UK in 1994 and the US in 2015.**

Its online store focuses on Lidl's weekly specials, with offers around technology, multimedia, fashion and more. **Shoppers are still waiting for the company to sell groceries online.**

Lidl has tested a **click and collect partnership in Poland** and also partnered with **third-party delivery firms in Spain and Ireland**. In Ireland the retailer offers delivery in as little as an hour through a partnership with mobile app Buymie. In the **US Lidl partners with Shipt** for grocery home delivery.

Saturn

Company: Saturn

Headquartered: Germany

Founded: 1961

Online: www.saturn.de



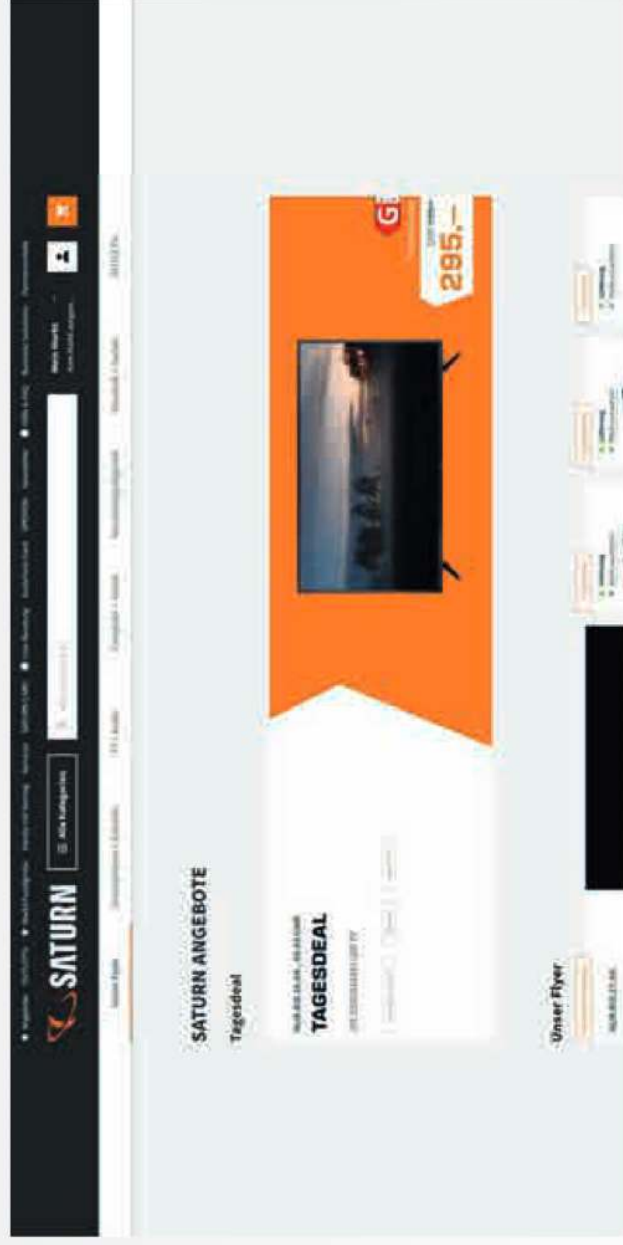
Runs rings around electricals

Sister brand to MediaMarkt, Saturn aims to showcase innovation and provide advice instore and online

Saturn was first founded in 1961. Under the ownership of Kaufhof Warenhaus AG it opened new stores in 1985, beginning with Frankfurt. However, in 1990 the stores were acquired by MediaMarkt and today the company operates as an independent sales brand under the umbrella of the MediaMarktSaturn Retail Group – Europe's number one in the electronics retail sector.

Today Saturn has around 135 stores in Germany, including what it claims is the world's largest electronics store in Hamburg's Mönckebergstraße, a 17,000 sq m six floor store. Nearly a third (45) of its stores are in North Rhine-Westphalia, Germany.

Saturn sells around 45,000 electrical items on average, including consumer electronics, household appliances and telecommunications in stores of between 2,000 sq m and 10,000 sq m in size.



Saturn turns technology into an experience for its customers

Unusually, **each Saturn store is registered as an independent company** at its respective location. The company says its success is based on providing sound advice to customers, showcasing the latest innovations instore and **online via www.saturn.de since 2011**.

Finance options such as warranty and insurance are also available. **In 2018 the company launched the option to**

lease products via its online store, extending the service in 2019 to its stores.

In April 2022^[1] **Saturn was awarded fourth place in the Google Omnichannel Excellence Study**. First place went to sister brand MediaMarkt.

[1] <https://www.mediamarktsaturn.com/en/press/press-releases/mediamark-awarded-outstanding-omnichannel-shopping-experience>

Shop Apotheke

Company: Shop Apotheke

Headquartered: Cologne

Founded: 2001

Online: www.shop-apotheke.de



Reinventing the rules

A pioneering online pharmacy

Shop Apotheke was **born from a traditional pharmacy store** in Cologne in Germany that had bigger ambitions to break new ground, be open for customers outside of normal opening hours and offer more service and choice, as well as bringing greater value to the market. Its **online store opened in 2001**.

The offer initially consisted of over-the-counter products such as beauty and add personal care, as well as dietary supplements. By **2004 the company had been granted permission to sell pharmacy and prescription drugs online**, making it one of the first online pharmacies to stock such a complete offer, as well as abolishing the price fixing of over-the-counter medicines.

Today Shop Apotheke **claims to be one of the top online pharmacies**. It stocks more than 100,000 original products, has advice provided by a team of more than 100 pharmacists



Shop Apotheke brings value to the online pharmacy sector

and pharmaceutical employees and has **around 5.5 million customers who typically save around 50% on traditional pharmacy prices**.

It ships more than 30,000 parcels a day sent from a logistics centre in the Netherlands that is the size of five football pitches and has the capability to ship 45,000 parcels in 16 hours.

Shop Apotheke began its European expansion in 2012, initially launching in Austria. It has a presence in various European markets and **listed on the Frankfurt Stock Exchange in 2016**.

Since 2019 it has offered a same day delivery service in all metropolitan regions of Germany for those who need their medication urgently.

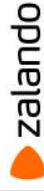
Zalando

Company: Zalando

Headquartered: Germany

Founded: 2008

Online: www.zalando.de



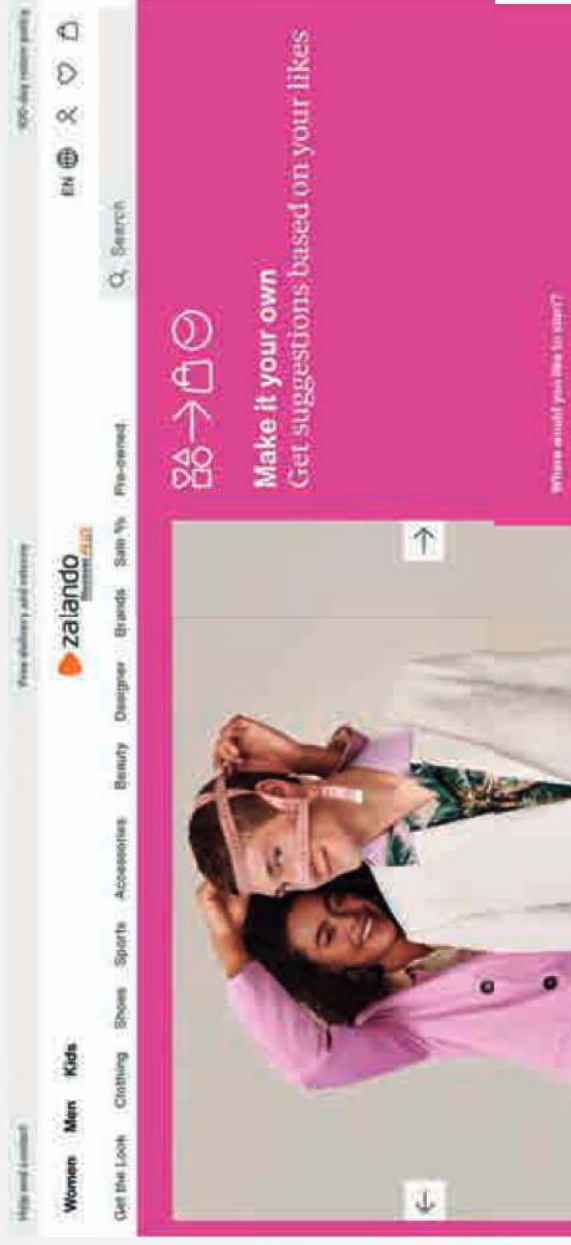
From start-up to powerhouse

Zalando continues to forge ahead, adding 10 million new customers in 2021 alone

Since its formation in Berlin in 2008, **Zalando has today established itself as a leading European online platform** for fashion and lifestyle. It was formed after university friends Robert Gentz and David Schneider pushed ahead with their plans to sell shoes online – an idea that had been mocked in feedback – which launched a couple of days before the start of the financial crash.

The pair worked from a shared apartment in Berlin before convincing another university friend Ruben Ritter to join them. The trio put in the legwork, literally. Their **mobile phone numbers were customer hotlines** and their courier network involved them taking the packages to the post office themselves.

The business grew quickly, beginning international expansion in Austria and Switzerland and into the Netherlands, its first non-German speaking market in 2010.



Zalando is currently active in 23 markets across Europe

Today Zalando sells more than **5,800 brands** from its online fashion store as well as selling through **Connected Retail**, Zalando's solution that allows it to sell through more than 7,000 bricks-and-mortar stores.

Growth has been rapid for the retailer, with Zalando **adding more than 10 million new customers in 2021 alone**, with 48 million active customers in total. The company also operates a **network of 13 Zalando Outlet stores**, the most recent of

which opened in Berlin City West in March, ten years after the first.

Zalando is **active in 23 European markets** with close localisation offered in each country. The retailer offers **20 local payment options**, collaborates closely with regional logistics service providers across a **network of 12 fulfilment centres in Europe (with four more due to open by 2023)** and covers 19 languages.

Figures & sources

Figures

Population structure	4
Population growth	4
GDP per capita (USD)	4
Ecommerce users in Germany, 2017-2025 (in millions)	5
Inflation rate in Germany, by month, 2020-2022	5
Indices	12
Most used online payment brands in Germany, 2021	13
Payment methods most offered by the top 500 German online stores, 2021	13
Where consumers would like to use mobile payments in Germany, 2021	14
Most used mobile payments brands in Germany, 2021	14
Preferred online shopping delivery methods in Germany, 2021	15
Most used shipping service providers by the top 500 German online stores, 2021	15
Ecommerce consumer expectations of delivery time in Germany, 2021	15
Importance of delivery related characteristics when ordering products online in Germany, 2021	15
Consumer willingness to use rapid 10 minute grocery delivery services in Germany 2021	16
Delivery and returns services that German consumers would like to use, 2021	16
Options that German consumers would consider to make their delivery more sustainable, 2021	17
What would help to reduce consumer propensity to returns items, 2021	17
The premium as a percentage of product cost that German consumers are willing to pay for carbon neutral or green delivery, 2021	17

Online shopping returns in Germany, by category, 2021	17
Interest of online shoppers in Germany, by category, 2021	18
Purchases of online shoppers in Germany, by category, 2021	18
Ecommerce net sales of the top 500 online stores in Germany, by category, 2021 (in billion USD)	18
Attitudes towards online shopping in Germany, 2021	19
Devices used for online shopping in Germany, 2021 in the past 12 months	19
Drivers of online purchase in Germany, 2021	19
Attitudes towards shopping in Germany, 2021	20
Willingness to pay more for sustainable deliveries in Germany, 2021	20
Top 5 perceived challenges for the country, 2021	20
Share of consumers that buy on social media sites (e.g. Facebook, Instagram, Snapchat)	21
Consumers who bought something after seeing it on social media in Germany, 2021	21
Social media presence of online stores in Germany, 2021	21
Social media platforms that German consumers shop on, 2021	21
Consumers preference to buy Christmas presents online or at local retailers	22
Online revenue from Christmas season sales in Germany, 2017-2021 (in billion euros)	22
Anticipated spending on Christmas gifts in Germany, by retail sales channel, 2017-2021 (in euros)	22
Advantages that German consumers see when doing Christmas shopping online	22
How COVID-19 has affected online shopping in Germany	23
How lifting of COVID-19 restrictions is expected to affect online shopping in Germany	23
Predicted online shopping levels post-pandemic compared to during the pandemic	24
Which of the following are the main reasons why you will continue to shop online after the pandemic?	24
How often consumers will shop online once all pandemic health	

measures have been lifted (i.e. no restrictions are in place)	24
Web traffic by sector	25
Countries from which shoppers visit the Germany-based Largest 100 German web traffic to the Germany Largest 100 retailers, by country of retailer headquarters	26
Countries where the Germany Largest 100 retailers are based	26

Sources

- Population structure	
- Population growth	
- GDP per capita (USD)	
- Consumer willingness to use rapid 10 minute grocery delivery services in Germany 2021	
- Options that German consumers would consider to make their delivery more sustainable, 2021	
- What would help to reduce consumer propensity to returns items, 2021	
- The premium as a percentage of product cost that German consumers are willing to pay for carbon neutral or green delivery, 2021	
- Share of consumers that buy on social media sites (e.g. Facebook, Instagram, Snapchat)	
- Social media platforms that German consumers shop on, 2021	
- How COVID-19 has affected online shopping in Germany	
- How lifting of COVID-19 restrictions is expected to affect online shopping in Germany	
- Predicted online shopping levels post-pandemic compared to during the pandemic	
- Which of the following are the main reasons why you will continue to shop online after the pandemic?	
- How often consumers will shop online once all pandemic health measures have been lifted (i.e. no restrictions are in place)	
- Web traffic by sector	
- Countries from which shoppers visit the Germany-based Largest 100 German web traffic to the Germany Largest 100 retailers, by country of retailer headquarters	
- Countries where the Germany Largest 100 retailers are based	

RetailIX(2022)

- Top 5 perceived challenges for the country, 2021 - page 10
 - Attitudes towards shopping in Germany, 2021- page 21
 - Attitudes towards online shopping in Germany, 2021- page 22
 - Drivers of online purchase in Germany, 2021- page 26
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 - Where consumers would like to use mobile payments in Germany, 2021- page 79
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Conclusion

We hope that you have found our research and analysis to be of interest and commercial value. We would be very pleased to hear from you with questions, suggestions or comments, and in particular we would like to hear about any areas you think we should include in the 2023 report. Please get in touch via: research@retailx.net

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