



FRANCE 2022

Ecommerce Country Report

In partnership with

ACI Worldwide

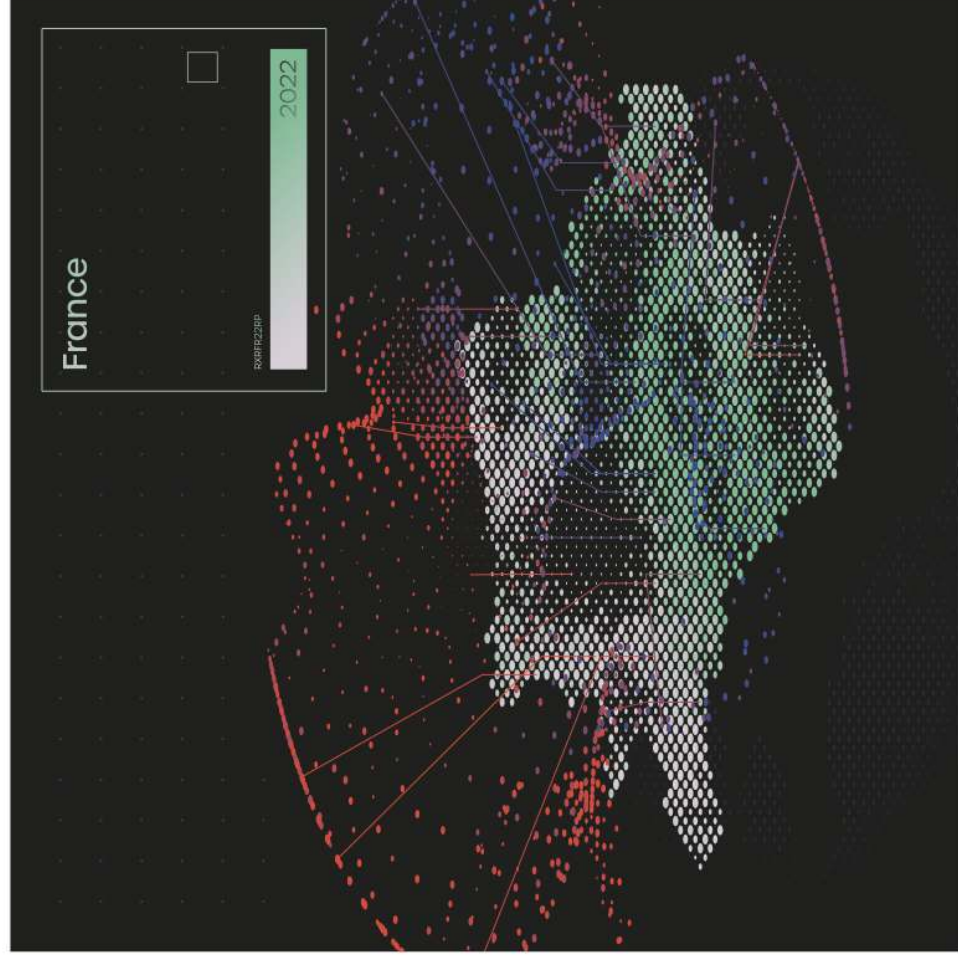


Rakuten
Advertising

€499 | MAY 2022

RXRFR22RP

www.retailx.net



Introduction



Welcome to the 2022 *RetailX France Ecommerce Country Report*. As the world's fifth-largest economy, France is always going to be of interest to retailers and those wishing to expand. After what can only be described as a "hell of a few years", French consumers are optimistic about the future.

They're internet savvy, they're open to innovation and they're willing to pay for quality – all the factors needed for successful ecommerce expansion.

Thanks in part to the government's swift response to the pandemic and its determination to save the economy, France has bounced back relatively well and is eyeing good growth, despite global uncertainty.

What remains to be seen is how and where the country implements its recovery funding and whether this translates into sustainable growth.

It's clear that more investment is needed into training to address labour market shortages and there are calls for greater emphasis on greener business, all of which should provide opportunities for small businesses and the country's burgeoning startup scene.

As ever, we hope the following pages go some way to serving as a primer for those who want to expand their business in the country and we welcome any feedback on what works and doesn't work for you.

Ian Jindal, CEO, RetailX

Contents

Country profile	3
Market context	4
Partner perspective: ACI Worldwide	7
Partner perspective: Asendia	9
Partner perspective: Landmark Global	11
Partner perspective: Rakuten Advertising	13
Holidays	14
Consumer	16
Cross-border	18
Indices	19
Payment methods	20
E-shoppers	22
Delivery	24
Marketplaces	26
Covid-19	28
Largest 100	30
Figures & sources	32
Conclusion	34

Country profile

France did well in GDP terms but is lagging when it comes to export

The world's seventh-largest economy, France exceeded GDP expectations last year

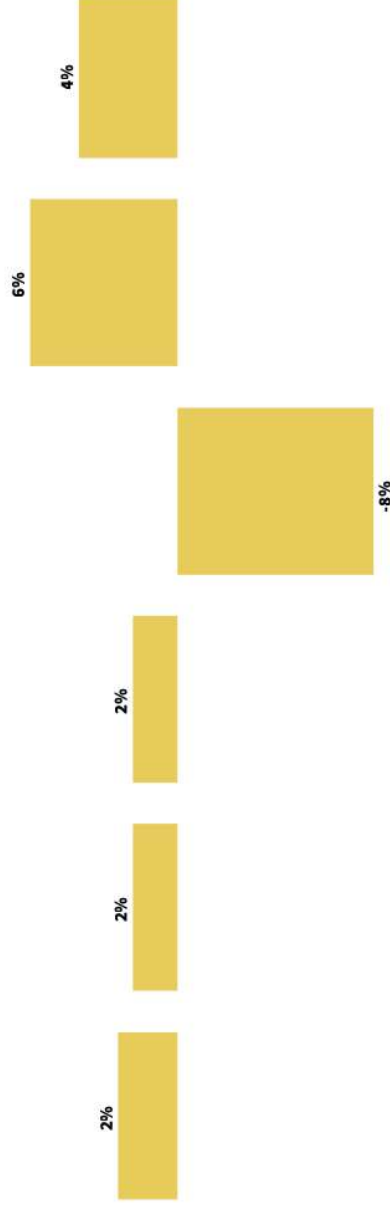
France's ecommerce sector is strong and continues to thrive. Some segments of the sector saw significant growth during the pandemic, while areas such as tourism took a hit.

In addition, unemployment in France has fallen to a 10-year low, consumer purchasing power has increased and foreign money has started to dribble in as the country gains increased attractiveness to international investors.

Experts predicted that France would start to see export losses of around €1.9bn per year, principally in aircraft, pharmaceuticals and manufactured goods.

And, while the economy grew at its fastest pace in 52 years in 2021, it's true the country also recorded lowest net export figures in its history.

Gross domestic product (GDP) growth rate in France between 2017 and 2022, in volume



2017	2018	2019	2020	2021	2022
------	------	------	------	------	------

Note: Survey conducted from 2017 to 2022.

Source: Ministère de l'Économie et des Finances. Accessed via Statista

© 2022 Retailix 2022

However, President Macron has outlined plans to recover an equal trade balance over the next decade.

There continues to be ongoing challenges around Brexit, with rising shipping costs and cancelled freight routes. Issues with raw materials and rising energy prices all mean the trade deficit will not improve any time soon.

This year, the European Commission's proposed Digital Services Act (DSA) and the Digital Markets Act (DMA), part of the EU's Digital Single Market Strategy will enter force, aiming to create a safer digital space and establish a "level playing field to foster innovation".

This should go some way to reaching the government's ambitious targets for enterprise and startups.

Market context

The French economy has shown unprecedented growth but how will it fare in the face of current global unrest?

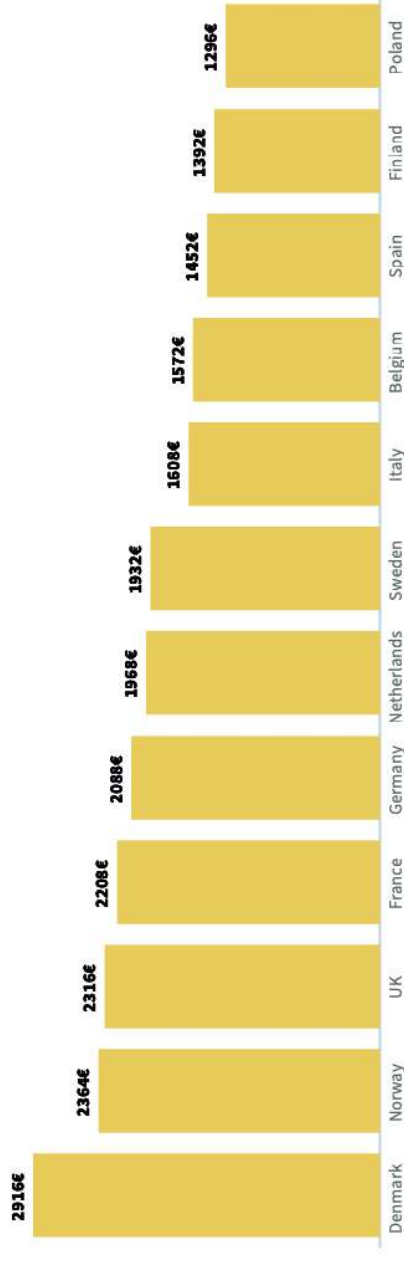
The world is still reeling from the effects of Covid-19, Brexit and, more recently, military conflict, which is causing optimism to wane.

However, the French economy has been one of the best-performing since the pandemic, with GDP around one per cent higher in the fourth quarter of last year compared with the same period in 2019 (before the pandemic)¹.

Last year, Francois Villeroy de Galhau, Governor of the Bank of France and a policymaker at the European Central Bank, optimistically predicted a minimum 5.5% growth rate for 2021. He wasn't wrong – the country grew 7%, the strongest in 52 years. This growth is, arguably, in part thanks to huge state intervention. The second-biggest economy in the eurozone, the country also has the highest government spending.

France is the most visited country in the world. However, last year, research from WTTC, the World Travel and Tourism Council², showed that travel and tourism's contribution to

Estimated yearly average ecommerce spending per capita in selected European countries, 2021



Note: Online survey conducted in 2020 and 2021. Results include 12000 interviews with consumers in Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden and the UK. The interviews were conducted with representative nationwide samples of private individuals aged 15-79 years; the number of respondents may vary somewhat around 1,000 between the countries.
Source: PostNord

© Retailix 2022

“The second-biggest economy in the eurozone, the country also has the highest government spending”

French GDP dropped by a staggering €103bn in 2020, thanks to a combination of COVID-19 and Brexit uncertainty.

The forecast this year is considerably happier, however, with new research from WTTC suggesting that, if restrictions continue to ease, the travel and tourism sector could gain more than 60,000 jobs in 2022, reaching 2.8m and surpassing pre-pandemic levels by 2.3%.

Spending and saving money matters to French voters and this was reflected the polls. The far-left candidate Jean-Luc Mélenchon was riding on a ticket to increase social measures and block prices but Marine Le Pen and Eric

Zémmour were keen to cut foreign aid in a bid to save money. However, Macron's popularity surged since his high-profile role as the go-between in Russia's war on Ukraine.

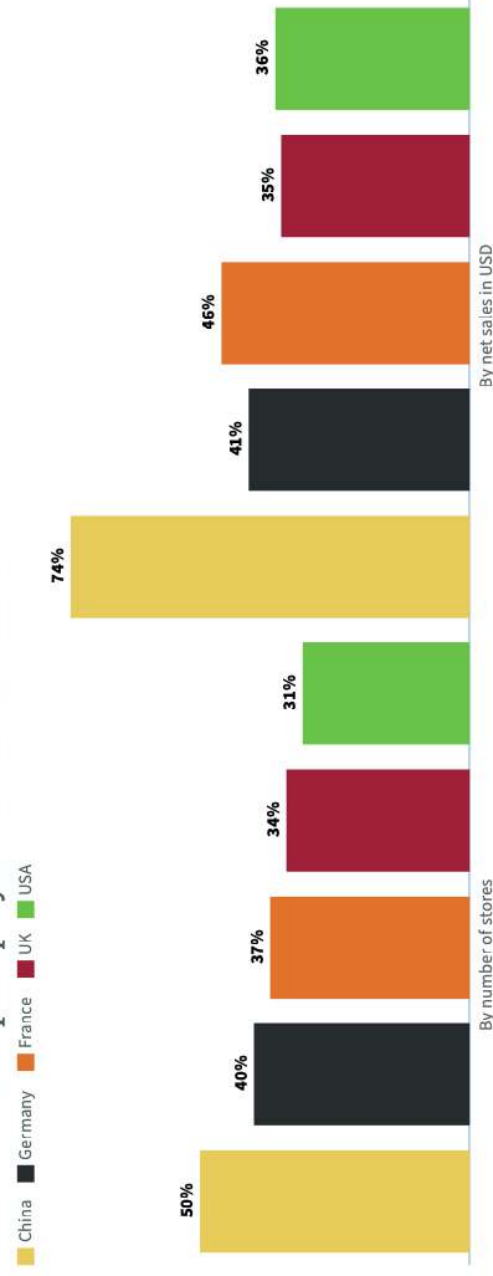
France's already high digitalisation (92% internet users) has made lockdown shopping in a predominantly online environment easier than for other countries affected and, while physical stores have suffered as a result of the pandemic, the country's ecommerce sector has benefited enormously from ongoing lockdown measures. The country now has the fourth highest average ecommerce spend per capita at €2208, just behind Denmark, Norway and the UK.

There were 48m French ecommerce users in 2021 and the ecommerce market is worth US\$42bn.

In terms of numbers, 37% of the top 500 French stores are online pure players, that is stores that sell exclusively online, and this accounts for 46% of net sales. For context, this is higher than the US (31% and 36%) but lower than China (50% and 74%).

“The country's ecommerce sector has benefited enormously from ongoing lockdown measures”

Share of online pure players in selected countries



France is a nation of startups and this is something the government has taken pains to encourage. Back in 2019, Macron identified the goal of having 25 French 'unicorns' (a private company valued at \$1bn or more) by 2025. This goal was reached in January when robotics company Exotec, raised \$335m in funding, bringing its valuation close to \$2bn.

Looser restrictions and increased government spending should provide a fertile ground for French ecommerce innovation in the coming year.

(1) <https://www.reuters.com/world/europe/france-2021-economic-growth-strongest-52-years-7-2022-01-28/>
(2) <https://wtc.org/News-Article/France-Tourism-sector-could-see-employment-surpass-pre-pandemic-levels-this-year-says-WTTC>



The All-in-One Payments and Fraud Solution That Gives Your Business Endless Possibilities

ACI® Secure eCommerce™

- **Sell More** – Increase conversions and expand your eCommerce reach through an extensive global network of acquirers and alternative payment methods
- **Lose Less** – Protect your customers' purchasing journeys with sophisticated, real-time fraud prevention technology
- **Maintain Control** – Reduce operational costs with an acquirer-agnostic platform

To see how ACI Secure eCommerce can transform your online payments platform, visit aciworldwide.com/ecom.



Expert insight



Denis Barritault

A consistent, omnichannel customer journey is essential, says ACI Worldwide's principal solution consultant

In what key ways have French consumer and delivery habits changed over the last couple of years?

Like everywhere else, the COVID crisis has largely contributed to the increase of contactless for payment in-store. According to Cartes Bancaires, contactless transactions represent 56% of card transactions in store. It's also led to the extended usage of e-commerce. While France was very active on e-commerce prior to Covid, it reached another level when most of physical stores were closed.

What does this mean for ecommerce? (What are the key lessons retailers and service providers need to take from this?)

From a merchants' perspective, the key takeaway is that you cannot have in-store on one hand, and ecommerce on the other hand. Merchants must provide a consistent, omni-channel customer journey. Covid has shown to retailers that their business should not stop because stores are closed, and they have to provide alternatives to their

customers through extended e-commerce and m-commerce experience, click&collect, home delivery, lockers, etc. On ecommerce specifically, retailers have learned that any friction during the sales process could result in cart abandonment and therefore a bad transformation rate. In this respect, the optimisation of the payment stage is a major point. Payment should be as frictionless and as easy as possible so customers stay satisfied and loyal.

What are going to be the key challenges for ecommerce providers (especially in light of Brexit)?

The challenge for ecommerce service providers is to make sure they stay relevant, in a time of change and uncertainty for merchants. In that regard, providers should make sure they have answers to key questions from merchants: how to support all the payment methods required by end-customers (knowing that a significant part of these payment methods are local) and improve the country coverage, how to optimise merchants' payment costs (through multi-acquiring, domestic acquiring, intelligent routing), how to make the customer journey frictionless and omni-channel (by implementing new payment methods and taking advantage of 3DS v2's exemptions to Strong Customer Authentication). On top of that, providers hosting in the UK had to make extra work on Merchants' and Consumers' data protection and compliance to EU regulation (GDPR), to ensure that it is at the same level than it was before Brexit.

What do retailers need to bear in mind when entering the market?

Think local. Adapting to local customer usage, local channels, supporting preferred local payment methods is key to enter any market. And, as most French retailers are international, make sure the solution can expand easily to other geographies. Could you also talk a bit about your own growth and future plans for the company and any expansions or innovations?

ACI has a lot of ambitions for France : We have recruited some new staff to aggressively address the in-store, e-commerce, and merchant fraud markets. We are launching new offerings packed with innovations such as crypto-currencies acceptance, ACI PayAfter BNPL aggregation, compliance to latest standards in-store, etc. We want to position ourselves as an alternative to the traditional payment solution providers by bringing more agility, innovation and value for the merchants.

ACI Worldwide

ACI delivers mission-critical real-time payments software solutions that enable corporations to process and manage digital payments, power omni-commerce payments, present and process bill payments, and manage fraud and risk. For more information please visit: www.aciworldwide.com

Grow your business
across borders with
e-PAQ the new range
of e-commerce
solutions by Asendia

ASENDIA
BY LA POSTE & SWISS POST

e-PAQ

BY ASENDIA*

www.asendia.com

With 4 options for delivery, e-PAQ gives you the flexibility
to choose the right service with the right features at the right price.
It's simple to use and it's sustainable.



THE WORLD IS
YOUR ADDRESS



Expert insight

Arnaud Lorant



Head of e-commerce market development,
France at Asendia

In what ways have French consumer and delivery expectations changed over the last few years?

Consumers are aware that the last two years have been challenging for retailers. They have been forgiving of longer fulfilment times and delivery delays caused by the pandemic which saw a boom in online order volumes whilst at the same time delivery networks struggled with staffing, transport and customs challenges.

However, in many shoppers' eyes the pandemic is old news and they will be less likely to be loyal if there are still inefficiencies and delays during the e-shopping experience today. In fact they now expect a more flexible delivery experience, to match their 'new normal' lives. Many consumers now have hybrid work lives, with time split between the office and home, so they want delivery options that suit. Home delivery remains the preferred delivery method in France, however, pick-up points (post offices, shops and lockers) as well as click-and-collect

options are starting to entice more and more consumers. This trend is likely to continue, with La Poste developing flexible solutions for delivery and returns in response.

What are going to be the key challenges for ecommerce providers (especially in light of Brexit)?

The pandemic came at a time when there were already significant challenges around Brexit and EU VAT legislation changes. Additionally, the French tax authorities have made further demands of importers for 2022. Larger retailers with personnel focused on logistics, taxes and law, have been able to get ready for these changes (not without significant stresses) but many smaller online sellers are still trying to overcome obstacles. We have partnered with a specialist international consultancy that can offer support on IOSS registration and tax issues.

What do retailers need to bear in mind when entering the market?

The French ecommerce market is competitive but diverse. It is characterised not only by the presence of numerous online marketplaces but also many local eshops. So foreign retailers entering the market need to have a competitive advantage, whether that's their brand, price, scarcity, unrivalled quality, or something else. Optimising a store for the French market is vital. The French expect to see a website in their language and currency, with local payment options and familiar delivery choices; with La Poste and their parcel brand Colissimo the most popular.

With La Poste as a parent company, Asendia is an expert on the French market and first to hear of service innovations. We have unique access to La Poste's postal network and the parcel solutions of its Colissimo and Chronopost brands. Mailbox Returns by Colissimo is a great example of how it has adapted to market demands.

The majority of consumers say they would prefer a collection from home, and now with Mailbox Returns the shopper can leave the parcel in their mailbox, and La Poste and Asendia take care of the rest. Additionally, according to several surveys, French consumers are very interested in green delivery, and since 2022 Asendia has become carbon neutral, and La Poste is investing heavily in electric vehicles, low carbon buildings and renewable energy projects.

ASENDIA

BY LA POSTE & SWISS POST

Asendia is one of the world's leaders in international ecommerce and mail. Combining the expertise of its founding companies, La Poste and Swiss Post, Asendia brings together a wealth of international and local know-how. With La Poste as our parent company, we are uniquely placed in the exciting French market.

www.asendia.com



landmark global

a bpost company

Open your world

Your trusted international logistics partner
powering your e-commerce growth.



International Parcel Delivery



Customs & cross-border Solutions



Returns Management



E-commerce Solutions

Contact us: sales.europe@landmarkglobal.com

www.landmarkglobal.com

Expert insight

Jan Van Roey



Reliability and stability are key to the French consumer says Jan Van Roey, SVP Europe & UK, Landmark Global

In what key ways have French consumer delivery habits changed over the last few years?

We've noticed that the French consumer values reliability and stability over speed and this is something we've always provided. Only 6% of volume is delivered in 24hrs (express service), whilst more than 60% is delivered in a two-to-five-day window (something we specialise in and which we call "economy express").

This is distinct from other markets, such as the UK where 11% is delivered in 24hrs. It's clear that, certainly in France, quality of delivery is part of brand perception so any retailer wanting to work in that market must be mindful of this and partner with a logistics provider who can help them deliver reliability.

What are going to be the key challenges for ecommerce providers in the next few years?

Brexit is, of course, posing challenges. At the recent One to One ecommerce event in Monaco, a lot of customers were saying they had given up doing business with the UK. Yes, it's more complicated, obviously, since Brexit, but it shouldn't stop them. In general, it's no different from doing business with the US or Canada. However, you need to ensure you have everything in place to do this successfully. Doing this right is all about data. Ensuring your data is complete and correct will guarantee a smooth clearance process. The other key thing is to ensure you partner with the right companies who have the competence and knowledge to help you navigate these requirements through adapted logistics and/or software tools.

In some ways Brexit also poses an opportunity for those retailers willing to grow in the UK market and invest. There is, obviously, less competition and, as long as the right plans and partnerships are in place, there are rewards.

What can retailers learn from the growing C2C market in France?

The customer-to-customer (C2C) marketplace is growing fast and retailers are waking up to the advantages of selling direct to the customer, particularly targeting the 25-35 age group. C2C companies are usually very strong in 'ease of use', with a website which is easy to navigate and logistics solutions that everyone can easily understand and use.

The challenge for the middle-men and retailers is to ensure their offer also has this high-level of ease of use to attract repeat users.

What's next in France for Landmark Global?

Belgium is the largest export country for ecommerce goods from France, representing 22 % of the total export. As the national post in Belgium and having a very well established last-mile offer but also thanks to our European and intercontinental network to places such as the US and Canada, we are ideally placed to offer a comprehensive service offer for all French ecommerce players.



Landmark Global is your trusted international logistics partner to power your ecommerce growth. With a network spanning 220 destinations, our services include international parcel delivery, customs clearance solutions, and returns management. Being part of the bpost group enables us to expand our knowledge and capabilities and provide better e-logistic solutions to our customers.

landmarkglobal.com

Rakuten Advertising

REAL CONNECTIONS. REAL RESULTS.

There's a world of customers waiting to be discovered.
Reach them with Rakuten Advertising.

- **Media**
- **Performance Marketing**
- **Consumer Insights**

RakutenAdvertising.com



Expert insight



Edouard Lauwick

Rakuten Advertising Senior VP, Region, Southern EU on the changing nature of the French shopping landscape

The legacy of the pandemic starts to take shape

It would be foolish for anyone to claim that the Covid-19 pandemic is completely behind us – case numbers continue to ebb and flow across the world as new variants appear. But I do think that more than two years on from its arrival in Europe, the longer-term effects of the pandemic on consumer shopping behaviours can be assessed with some degree of confidence.

Increased online shopping blurs the lines

Without a doubt – whether through necessity during lockdowns or, more recently, through convenience and habit – the shift towards online shopping has been clear and consistent. This trend was noted even before restrictions came into play and with consumers spending more time shopping online, one effect has been a blurring of the lines between specific promotional events and general sales throughout the year.

In the last three months of 2021 and early part of 2022, we saw a seamless transition from Black Friday to Cyber Week, Cyber Week to Christmas, and Christmas to “ventes privées” in the build up to the winter sales. To many, the performance of the winter sales in France – traditionally a peak shopping period – was underwhelming. In the context of being the last in a long period of online shopping, it's less surprising.

A more conscious consumer

Awareness of the environmental impact of consumerism is a defining feature of these shifting consumer habits. Many brands profited from an upward trajectory in the demand for previously-owned goods. Rakuten France recorded a startling 230% increase in the number of second-hand products sold during the Winter Sales in France (compared to the same period in 2021).

Fashion brands, in particular, adapted to an increased awareness of the environmental impact of fast fashion. Promoting second-hand products and more equitable supply chains makes sense for retailers and brands, both in terms of protecting the planet and maximising sales revenues from the more conscious consumer.

Tapping into new shopping trends

Shopping events have changed for good, in line with changing consumer behaviours. As a result of this, retailers can no longer simply rely on key calendar events to drive

sales. They must also apply the right strategies to engage with targeted audience sectors. By tailoring marketing messages around specific audiences and products during promotional events, retailers can incrementally improve sales without being invasive or inappropriate. The modern consumer is highly complex, so brands must mirror this complexity if they are to succeed in a competitive online retail environment.

Rakuten Advertising

Rakuten Advertising connects leading agencies, brands and publishers to active and engaged consumers around the world. With access to Rakuten's diverse media properties and audiences, combined with an award-winning performance network and proprietary consumer research, Rakuten Advertising creates the right conditions to reach new customers and sustain long-lasting loyalty. Its foundation of advanced technology, data and strategic services positions Rakuten Advertising to offer a differentiated suite of marketing and advertising solutions, while constantly pushing the industry forward. It is a division of Rakuten Inc. (4755: TOKYO), one of the world's leading Internet service companies. The company is headquartered in San Mateo, CA, with offices throughout EMEA, APAC, LATAM and North America. Learn more at: www.RakutenAdvertising.com

Holidays

The last two years have been muted affairs but optimism abounds for this coming Christmas

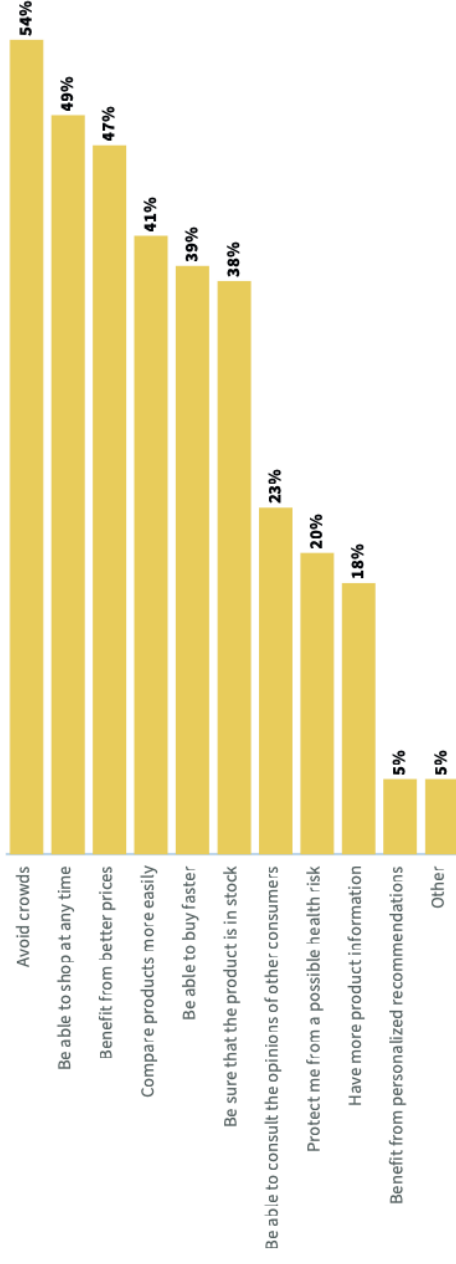
Maintaining margins over the festive shopping season has remained a challenge for retailers amid the increasing popularity of Black Friday, but there are signs of optimism for the future as consumer confidence grows.

The major holidays driving purchases in France include Christmas, Valentine's Day, Mother's Day (last Sunday of May) and Father's Day (penultimate Sunday in June). Seasonal sales tend to run for six weeks from January and then from late June.

Christmas in 2021 was once again a more muted affair than previous years amid a surge in cases of the Omicron variant of COVID-19. This was likely to be at least part of the reason for an increasing number of French consumers using the internet to buy festive gifts, with more than two-thirds (67%) saying they'd go online – up from 58% in 2020.

The most common advantage cited by French consumers for using the internet to do their Christmas shopping was avoiding crowds, with 54% saying it was a benefit. This was

What are the advantages to you of buying Christmas gifts online / in-store?



Note: Survey conducted in October 2021. Results include 1017 18+ France respondents.
Source: OpinionWay, Proxi mis, illoveretail.fr, Accessed via Statista

© Retailix 2022

followed by an ability to shop at any time (49%), better prices (47%) and being able to compare products more easily (41%).

Amazon proved particularly popular for online shoppers – with 53% of those surveyed saying they'd rely on the major US online retail giant. The closest rival was domestic omnichannel retailer Fnac Darty with just 23%, followed by online hypermarket E.Leclerc at 20% and cultural and creative goods website Cultura (18%).

The US retail phenomenon that is Black Friday is also proving increasingly popular in France – even more so than Christmas. Widely embraced by European retailers in the run-up to the Christmas shopping season, it usually runs for four days, culminating in what is now known as Cyber Monday.

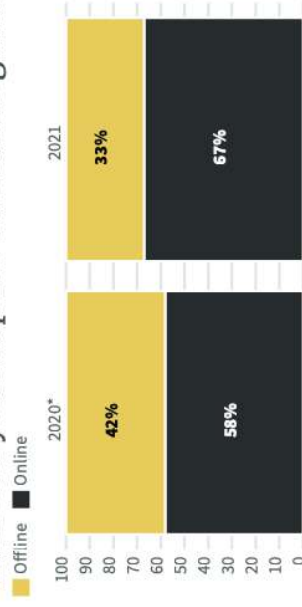
Like elsewhere in Europe, French consumers have been steadily spending more during Black Friday sales, with a total €416 million spent on that day alone in 2020.

Although ecommerce sites were reminded to behave responsibly just before the 2021 event, when the French government delisted US online marketplace Wish over selling unsafe products.

High-tech products were the most searched for product category on Black Friday 2021 in France, accounting for nearly 12%, followed by fashion (8.4%) and video games (3.5%).

Similarly, gaming consoles were the most searched for product, accumulating about 140,000 queries, along with phones (100,000) and home appliances (55,000).

Where do you shop for Christmas gifts?

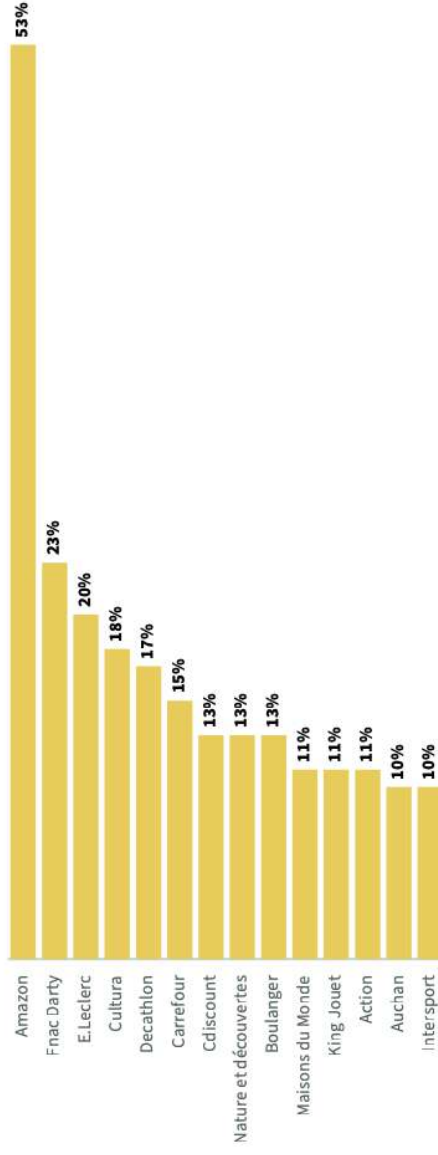


Note: Survey conducted in November 2021. Results include 904 18+ French respondents who plan to buy at least one Christmas gift (88% percent from a total of 1027 respondents).
*Figure calculated by Statista based on the information provided by the source.
Source: Bonial. Statista. Accessed via Statista

© 2022 Retailix 2022

What stores are you planning to buy Christmas gifts from?

53% of consumers in France said they intended to order online via Amazon when asked where they planned to do their Christmas shopping in 2021



Note: Survey conducted in November 2021. Results include 904 18+ French respondents who plan to buy at least one Christmas gift (88% of the 1027 total respondents).
Source: Bonial. Accessed via Statista

© 2022 Retailix 2022

However, there has also been a little bit of a backlash to the annual Black Friday shopping event, with more than half of French consumers believing it is wasteful and bad for the environment.

Just over a third of consumers (34%) think it should disappear entirely, although that figure is down from about four in 10 during the previous two years.

What about holiday shopping events for the coming year? French consumers indicate a confidence about returning to bricks-and-mortar stores post-COVID, but also a growing appreciation of the convenience of online shopping and the ability to shop around for a good deal. The most successful retailers are likely to be those who make their shoppers' lives easier at a traditionally stressful time of year.

Consumer

Even pre-pandemic, France was an advanced digital economy, open to online shopping and happy on mobile devices

Internet penetration is good in France (83%), as is ecommerce penetration (74%) and to improve this the government has committed to a national broadband programme – France Très Haut Débit – which promises fast broadband access for all households by 2022 and fibre for all by 2025. Moreover, basic digital skills levels among French consumers are slightly above the EU average (57%, compared with the EU average of 56%).

Being online is an everyday occurrence for most people (83%) in France. In 2023, the number of monthly active internet users is projected to reach 52.8m. In the third quarter of 2021, Facebook was the leading social media site, with more than 73.2% of French online users accessing it on a monthly basis. Some 59.5% use Facebook Messenger. WhatsApp is used by 55.7%.

As with everywhere else in the world, consumer behaviour has changed over the last few years. Research from McKinsey¹ in November suggests that two-thirds of French consumers were optimistic about economic

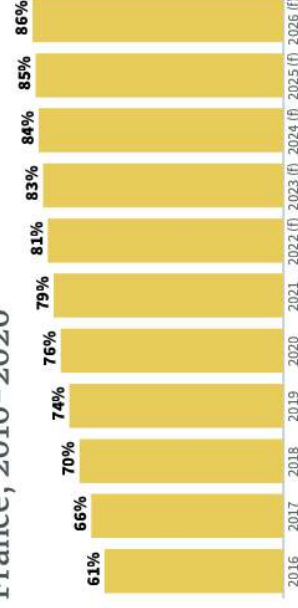
Which of these products and services are you interested in?



Note: Survey conducted in 2021. Results include 1932 18-64 French respondents who are online shoppers. Respondents could select multiple answers.
Source: Statista Global Consumer Survey

© Retailix 2022

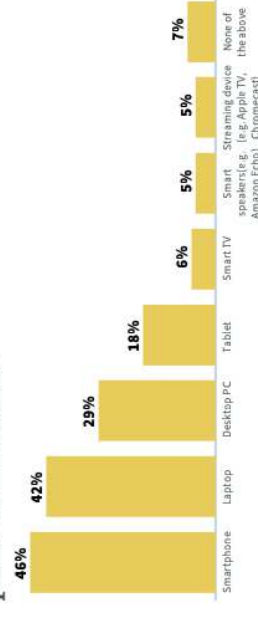
Mobile internet user penetration in France, 2016 – 2026



Note: Online survey to mobile phone users of any age who access the internet via mobile phone (browser or app) at least once per month in France. Data current as of July 2021.
Source: Statista Digital Market Outlook. Accessed via Statista

© Retailix 2022

Which of the following devices have you used for online shopping in the past 12 months?



Note: Survey conducted in 2021. Results include 2051 18-64 French respondents. Respondents could select multiple answers.
Source: Statista Global Consumer Survey (GCS). Accessed via Statista

© Retailix 2022

recovery – the highest since March 2020 – and intent to spend increased across most categories since February 2021. The McKinsey research also suggests that loyalty, as with everywhere else, has changed, with six in ten consumers changing some of their shopping habits (with value as a key driver).

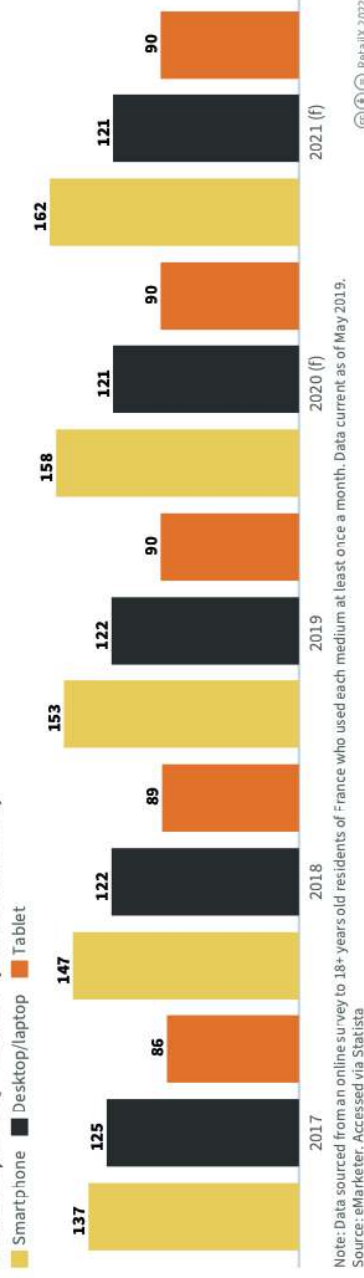
Homegrown products are still important to the French consumer. In 2021, 35% of French consumers were ready to spend a five percent higher price for a product made in France.

When spending returns to normal, it's likely to be focused on clothing (79%), shoes (75%) and food and drink (62%), the perennially top products for the French buyer. The biggest spenders in clothing were the 35-44 and 45-54-year-old age bracket (at 18% apiece). It's a similar story for shoes, at 17% in this age category.

French consumers are comfortable using mobile devices to shop, with 46% using a smartphone device in the last 12 months. Laptop comes in at 42%, showing the importance of optimised mobile shopping channels. Some 6% have used their Smart TV to shop and 5% have shopped using their Smart speakers, such as Amazon Echo.

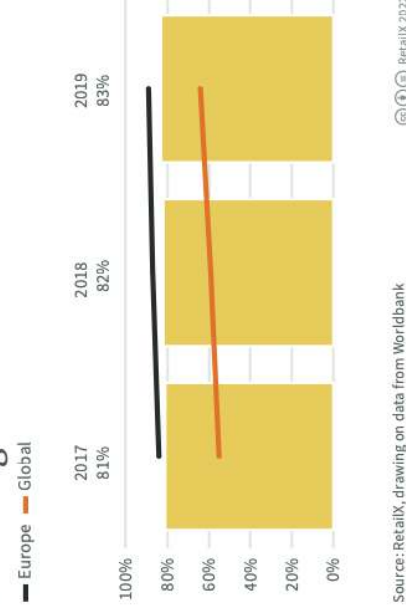
[1] <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/survey-french-consumer-sentiment-during-the-coronavirus-crisis>

Average time spent daily on internet media devices by French users by type of device, 2017–2021 (in minutes)



© 2022 Retailix 2022

Percentage of internet users



© 2022 Retailix 2022

Percentage of internet users who shop online



© 2022 Retailix 2022

Cross-border

Cross-border ecommerce is up everywhere but French consumers like to buy local

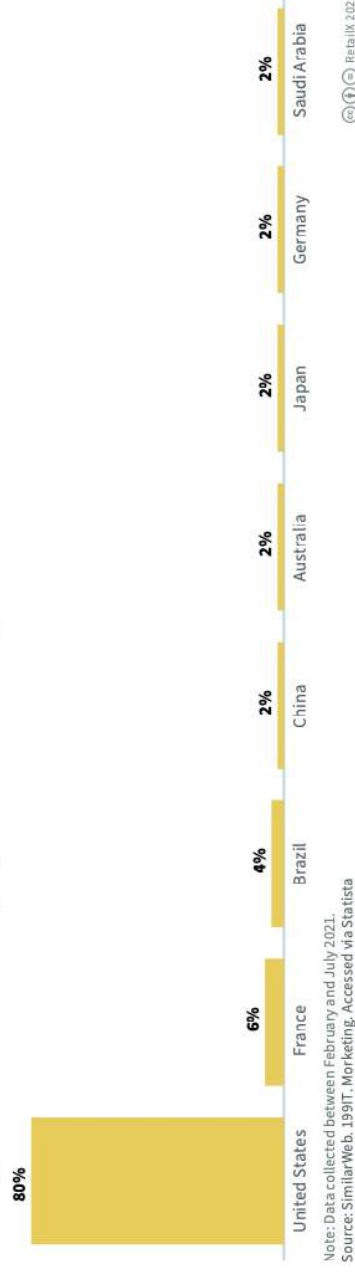
Cross-border ecommerce is set to exceed \$2.1trn in 2023, up markedly from \$1.9trn in 2022, according to research from Juniper Research. This fast growth reflects the increasing success of marketplaces, which offer goods across borders, as well as the rising popularity of cross-border sales as an ecommerce model.

The products French consumers are most likely to buy from overseas are clothes, footwear and accessories.

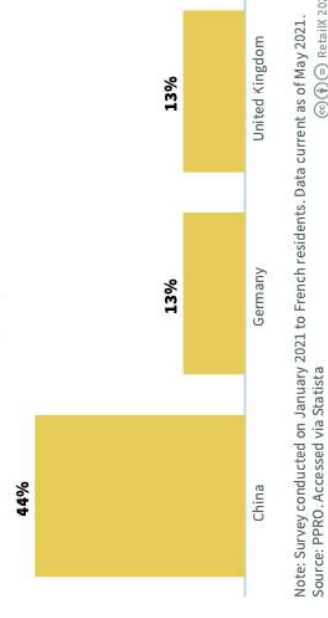
China was the country from which most French consumers bought online in January 2021. As of that date, China accounted for approximately 44% of cross-border purchases from France. This was followed by Germany and the United Kingdom, each with a 13% market share.

Some 13% of French consumers have made cross-border online purchases. China is the most popular destination for these purchases and 6% of all visits to independent cross-border export ecommerce platforms headquartered in China come from French customers.

Distribution of visits of independent cross-border export ecommerce platforms headquartered in China, by source country



Leading markets of origin of cross-border online purchases in France as of 2021, by market share



Less than 25% of goods sold internationally come from French companies and France still trades the most to its neighbours, particularly Belgium, Spain and Italy.

There has also been a rise in popularity of Made In France products. According to the French Federation for Beauty Companies, international trade of French beauty and personal care products was up 2.5% in 2021 versus 2019, with record growth rates to China and the US.

It seems that nearly 40% of French consumers were ready to spend a five percent higher price for a product made in France in 2020. The following year, this proportion dropped to 35%.

Indices

Improvements since last year but still work to do on capacity and policy

France ranks sixth on the overall Inclusive Internet Index, up from ninth last year. Compiled by The Economist Intelligence Unit, the index “seeks to measure the extent to which the internet is not only accessible and affordable, but also relevant to all, allowing usage that enables positive social and economic outcomes at the individual and group level”.

Overall, France continues to perform well. The cost of access to digital services is low, especially when compared to other nations, though this is down on last year.

The government is going to increasing lengths to enable digital access. Relevance (existence and extent of local language content and relevant content) is up (from 23 to 15), as is readiness. However, one area of improvement is the willingness and capacity of national administrations to use information and communication technologies in order to deliver public services (down from nine last year to 19).

Indices

Definition (Year this data refers to 2022)

Logistics Performance Index (LPI)	LPI measures performance along the logistics supply chain within a country	16 /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	32 /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	19 /193
Integrated Index for Postal Development (2IPD)	2IPD is a comparative indicator of postal development around the world built on four pillars: reliability, reach, relevance and resilience	5 /170

Internet Inclusive Index

Availability	Quality and breadth of available infrastructure required for access and levels of internet usage	19 /120
Affordability	Cost of access relative to income and the level of competition in the internet marketplace	3 /120
Relevance	Existence and extent of local language content and relevant content	15 /120
Readiness	Capacity to access the internet, including skills, cultural acceptance and supporting policy	41 /120

Overall Internet Inclusive Index

Overall Internet Inclusive Index		6 /120
----------------------------------	--	--------

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

Payment methods

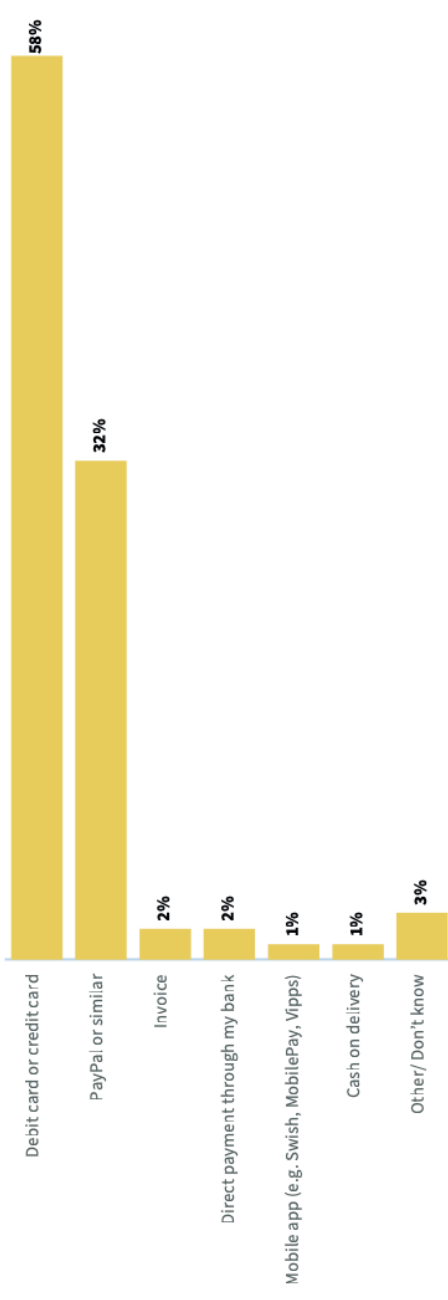
Consumers in France are happy to adopt new payment methods but card is still king – for now

France has long been a pioneer in payment technology, adopting new ways to pay happily and embracing smart chipping in the early nineties. Nonetheless, there is a tendency to do things at their own pace and not necessarily in line with other countries.

Card is king

Banque de France research finds that in 2020, Germany topped the European Union ranking for the number of non-cash payments issued, with 22% of the European total, closely followed by France at 20%. The bank says that the use of cash in general payment transactions is declining, while card payments (which account for more than half of cashless payments in France) are increasing faster than anything else. Contactless payments are also seeing sharp growth.

Payment method preferences for online shopping in France



Note: Online survey conducted in 2020 and 2021. Results include the subset of consumers who say they shop online, from a total of 12000 interviews with consumers in Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden and the UK. The interviews were conducted with representative nationwide samples of private individuals aged 15-79 years; the number of respondents may vary somewhat around 1,000 between the countries.
Source: PostNord

© 2022 Retailix 2022

Debit and credit card is still the dominant payment method in the ecommerce space, at 58%. PayPal (and similar) lag behind at 32% (though this still presides over its competitors). This is likely mostly to do with the prevalence of the Cartes Bancaires, the country's popular interbank domestic card payment system, which is typically co-branded with Visa and Mastercard.

Mobile is marching

The European card landscape is a complex one and it's difficult to make cross-border generalisations. However, in France, digital wallets are also gaining in traction as mobile commerce sales become more popular and according to JP Morgan's 2020 France report, card use is expected to decline by 2023. The JP Morgan

research also shows that women are currently more likely to use mobile commerce as their preferred method of payment.

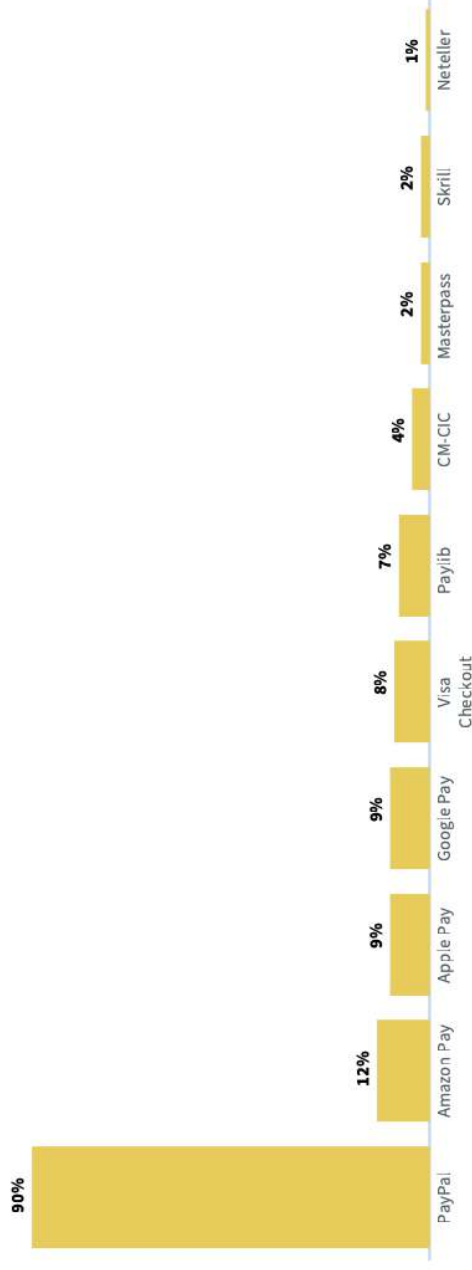
Though PayPal is less common still, 90% of respondents had used it in the last 12 months. Moreover, the JP Morgan research found that around 41% of French ecommerce merchants say they have optimised their operations to accept payment via social media (Facebook (first), Pinterest (second) and Snapchat (third)).

Payment innovations

There is also a range of interesting apps emerging that looks set to shake up the payments industry, such as contactless payment app, Sunday, which launched in 2020 with seed funding of around €20m. The app is the brainchild of former Bain consultant Christine de Wendel, and the app claims to cut pay time from 15 minutes to 10 seconds.

Then there is Paylib is a French language app that allows you to load your credit or debit card with euros and pay through your smartphone.

Which online payment services have you used in the past 12 months?



Note: Results include 1132 French respondents who used online payment methods. Respondents could select multiple answers. Data current as of November 2021.
Source: Statista Global Consumer Survey

© 1 RetailIX 2022

Crypto still stymied

Bitcoin-related projects in France are still hidebound by regulation. Know Your Customer (KYC) procedures are required from just €1 and all transactions must be traced. This makes it very hard for crypto startups to be accredited.

Nonetheless, crypto startups are on the rise in the country and, with the rise of such innovations, it will be interesting to see how payment habits continue to evolve in the coming year.

[1] <https://www.banque-france.fr/en/financial-stability/monitoring-cashless-payments/overview-cashless-payment-instruments-france>
[2] <https://www.banque-france.fr/en/financial-stability/monitoring-cashless-payments/overview-cashless-payment-instruments-france>

E-shoppers

The future is omnichannel for the ecommerce-happy French e-shopper

The French ecommerce market is predicted to reach US\$72bn by 2025, up from US\$40bn in 2017 and US\$59bn in 2021. With 48m ecommerce users in 2021 and 74% ecommerce penetration, it's fair to say that the French shopper is a comfortable e-shopper.

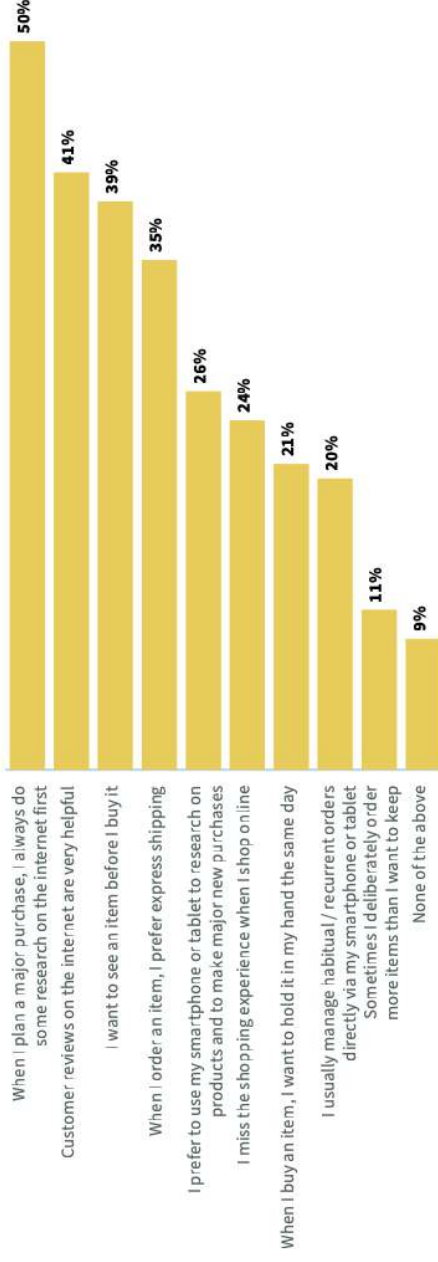
Planning ahead

Some 50% of French consumers say they use the internet to research a major purchase and 41% say customer reviews are helpful. However, a cautious 39% say they still want to see an item before they purchase it and 26% of these shoppers are using a smartphone to research and make their purchase.

Price is still a driver

The principal reason for shopping online for 56% of French consumers is cheaper prices, followed by 55% who like the direct delivery aspect. For 37% of French consumers a greater product range is a key driver and 34% simply consider it more convenient overall. However, just 14% say they prefer online shopping in general, suggesting that French consumers have some way to go before they abandon bricks-and-mortar altogether.

Which of these statements do you agree with?



Note: Survey conducted in 2021. Results include 2051 18-64 French respondents. Respondents could select multiple answers.
Source: Statista Global Consumer Survey

In fact, omnichannel seems to be the way forward for these shoppers. Research from McKinsey found

that omnichannel shopping is mainstream across all categories, but groceries, home and personal care are still happening in store.

Household supplies are the most common thing bought online, according to the McKinsey research.^[1]

Beating the crowds

At holiday time, people are using the internet more to beat the crowds, and this has, naturally, increased in the last couple of years. Online marketplaces were the most popular choice for Christmas shopping, at 35%, general websites at 24% and social media channels came in at 6% in research carried out in 2021.

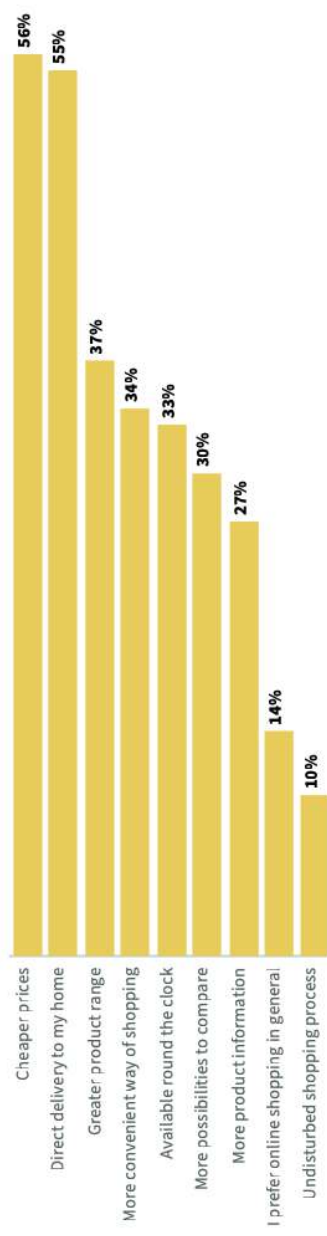
Security is paramount

With payment security issues one of the key reasons for cart abandonment, research from French ecommerce specialist Dalenys finds that the French are overwhelmingly in favour of stricter identification requirements for online payments and 88% agree that strong customer authentication is effective to guarantee online security.^[2] Two thirds of these say this will make them confident enough to try new shopping channels, such as social networks.

Nonetheless, the additional steps at the time of payment still pose a problem for some 38% of consumers. This is split in terms of age, with younger people finding it more of an inconvenience than older people, who prize security more.

[1] <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/survey-french-consumer-sentiment-during-the-coronavirus-crisis>
 [2] <https://www.dalenys.com/blog/e-commerce-in-2022-changes-and-expectations-among-the-french/>

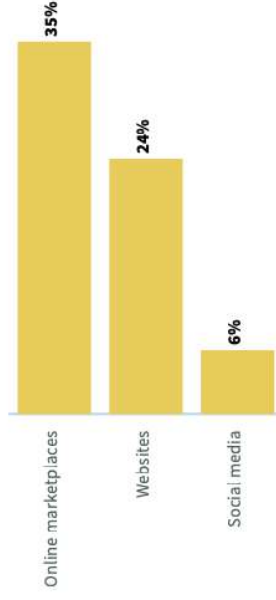
Which of these do you consider good reasons to buy an item online?



Note: Results include 2062 French respondents. Respondents could select multiple answers. Data current as of November 2021.
 Source: Statista Global Consumer Survey

© 2022 Retailix 2022

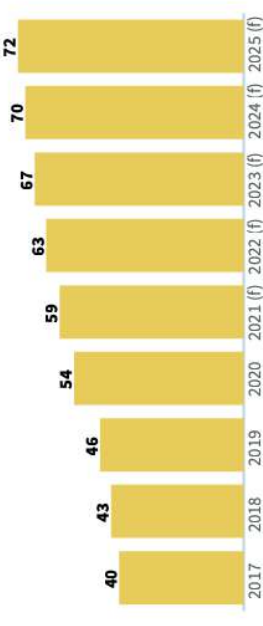
Preferred online shopping channels for the holiday season in France in 2021



Note: Online survey conducted between October and November 2021. Results include 700 18-59 French respondents.
 Source: Adot, Mobile Marketing Association France, Accessed via Statista

© 2022 Retailix 2022

Retail e-commerce revenue forecast from 2017 to 2025 (in billion U.S. dollars)



Note: Survey conducted in 2020. The e-commerce market includes the sale of physical goods via a digital channel to a private end user (B2C). All monetary figures refer to the annual gross revenue and do not factor in shipping costs.
 Source: Statista

© 2022 Retailix 2022

Delivery

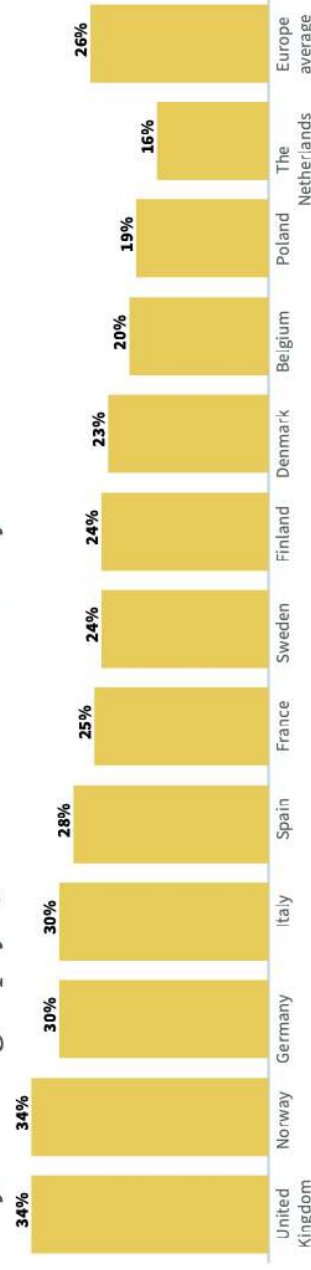
France is embracing home delivery but patience is still a virtue

Covid-19 has accelerated online shopping almost everywhere and France is no exception. With a natural decrease in instore shopping, browsing time has lengthened and digital purchasing has boomed.

Home delivery (with signature requirement) in France is popular (45%) above the European average (39%), but still not as high as Spain (70%) or the UK (55%). Signature requirements are lower in France than Italy (40%) or the UK (33%) but just 2% prefer to collect from a parcel machine (compared with 34% in Finland). Some 26% of French consumers would like to be able to collect purchases instore outside opening hours.

Polish parcel locker company InPost recently acquired logistics company Mondial Relay and intends to add 16,000 pick-up points in France, Benelux, Spain and Portugal, so it will be interesting to see what impact this has on parcel collection habits.

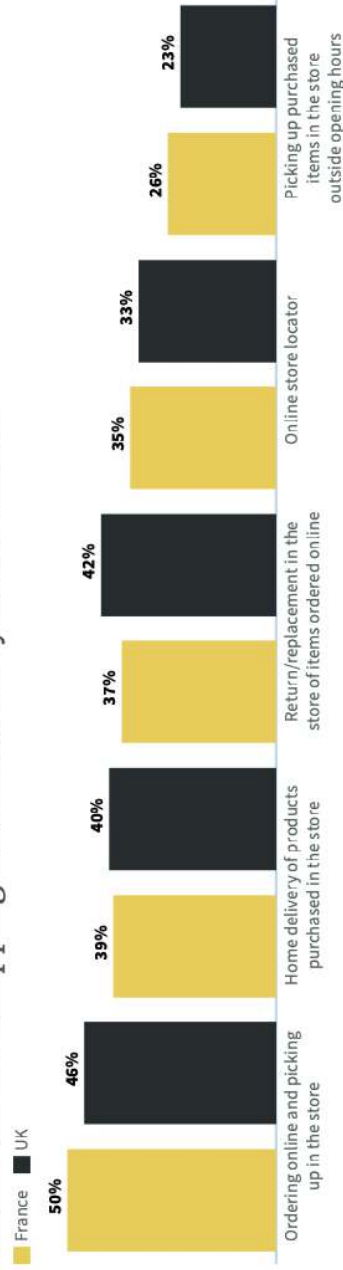
Are you willing to pay €3 extra for faster delivery?



Note: Online survey conducted in 2020 and 2021. Results include the subset of consumers who say they shop online, from a total of 12,000 interviews with consumers in Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden and the UK. The interviews were conducted with representative nationwide samples of private individuals aged 15-79 years; the number of respondents may vary somewhat around 1,000 between the countries.
Source: PostNord

© 2022 Retailix 2022

Which of these shopping services would you like to use?

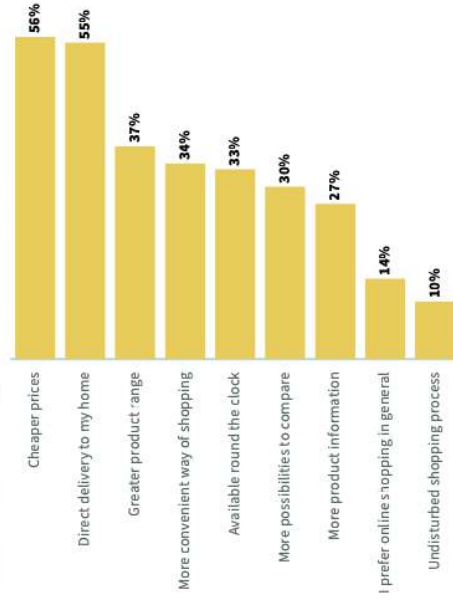


Note: Survey conducted in 2021 (last updated in October 2021). Results include 19,322 online shoppers in France and 20,324 online shoppers in the UK (split sample). Respondents could select multiple answers.
Source: Statista Global Consumer Survey

© 2022 Retailix 2022

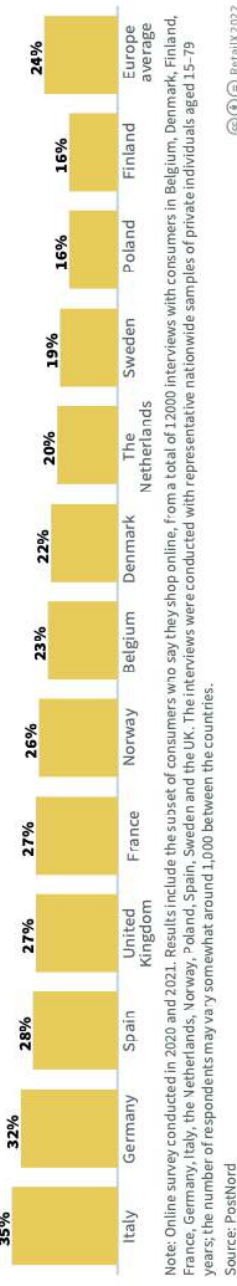
French consumers remain willing to wait for the right product and this has stood them in good stead against marketplace giants. Just 25% of French consumers are willing to pay €3 extra for a faster delivery, against 34% in the UK and 30% in Germany and Italy. The European average is 26%. However, in France, more (27%) are willing to pay the same price for a more eco-friendly delivery service (the same as the UK and, perhaps surprisingly, more than eco-friendly Norway, Belgium and Denmark).

Which of these do you consider good reasons to buy an item online?



Note: Results include 2062 French respondents. Respondents could select multiple answers. Data current as of November 2021.
Source: Statista Global Consumer Survey

Are you willing to pay €3 extra for more eco-friendly delivery?



Note: Online survey conducted in 2020 and 2021. Results include the subset of consumers who say they shop online. From a total of 12,000 interviews with consumers in Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden and the UK. The interviews were conducted with representative nationwide samples of private individuals aged 15-79 years; the number of respondents may vary somewhat around 1,000 between the countries.
Source: PostNord

When you order a product online, how do you prefer to have it delivered?



Note: Online survey conducted in 2020 and 2021. Results include 12,000 interviews with consumers in Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden and the UK. The interviews were conducted with representative nationwide samples of private individuals aged 15-79 years; the number of respondents may vary somewhat around 1,000 between the countries.
Source: PostNord

Marketplaces

Antipathy towards Amazon and an emerging circular economy make French marketplaces worth watching

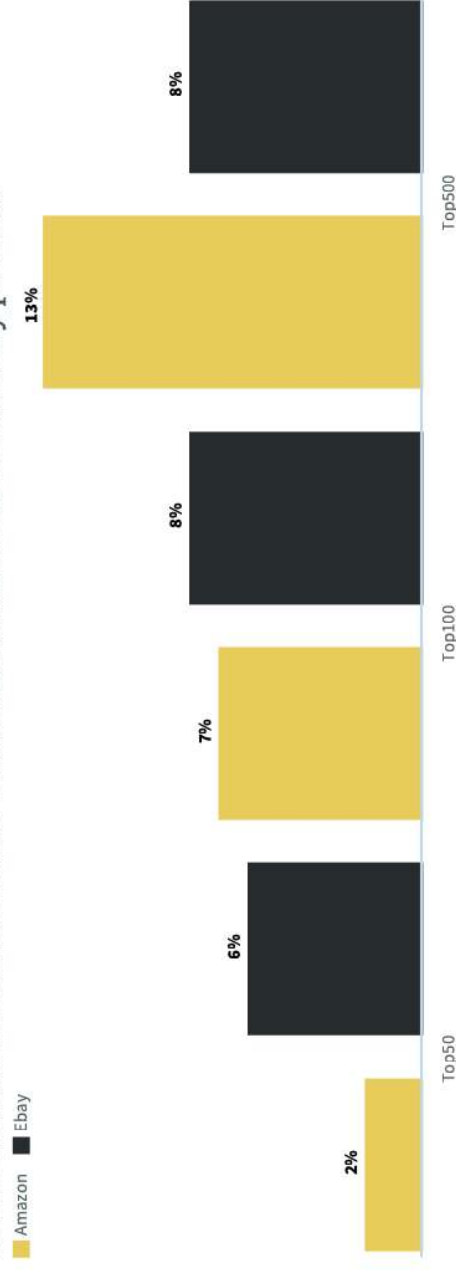
The European marketplace ecosystem is a complicated one and it's only getting more complex with a number of emerging players.

Amazon antipathy

Amazon is still the world's largest online marketplace, with an annual revenue of around \$US469bn. Nonetheless, it was brought to its knees in 2020 by the Solidaire Union, which successfully sued the company for failing to protect its workers, forcing the retail site to close its French warehouses for more than a month. During this period, Fortune reported that French online retailer Cdiscount's sales had rocketed by 40%.

France continues to stand firm against the retailer's dominance, recently working to push through legislation that will mean Amazon will have to drop its cheap deliveries in the country. Since the 1980s, France has had a single-book-price policy brought in to protect its independent booksellers from large distributors.

Share of French online stores with additional Amazon or eBay profiles



Note: Based on the top 500 online stores by net sales in France in 2020 for which information is available. Data current as of October 2021.
Source: ecommerced3

© 2022 Retailix 2022

Free deliveries are currently not allowed and it was recently decided that Amazon's €0.01 rate violates this.

In more blows to the marketplace's popularity in France, Bloomberg recently reported that four of Amazon's logistics hubs have been blocked in the last six months.

The online shopping giant's market share dropped in 2021, perhaps in part to the increased preparedness of the country's retailers after the initial pandemic wave and ongoing negative sentiment.

Happy clickers

Despite this, French consumers still shop happily on Amazon, with 70% saying that they'd bought something from the marketplace in the last 12 months, streets ahead of Cdiscount.com at 32%. FNAC.com came in at 25%.

In the first semester of 2021, Amazon registered more than 165m average monthly visits in France. Leboncoin and Cdiscount ranked second and third with around 158m and 51m visits per month, respectively.

Still, just 2% of the Top 50 French online stores have an additional Amazon presence. Some 6% have an eBay profile. This number is higher (13% for Amazon and 8% for eBay) among the Top 500 companies.

Digital expansion

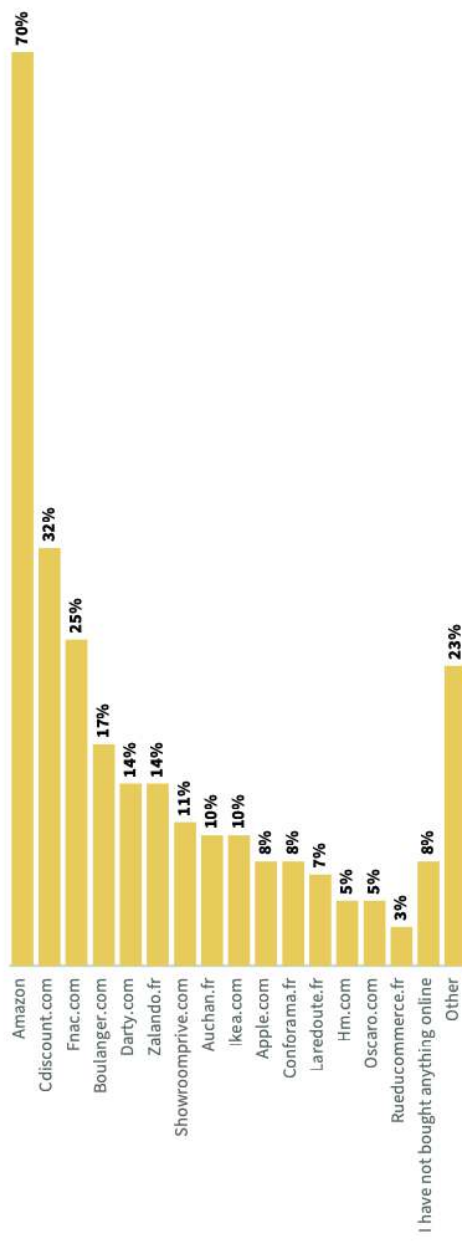
Cdiscount, which sells electronics, household appliances and food, was founded in the late 90s and was the market leader until Amazon's inevitable creep. Close rival, electrical retail company FNAC Darty, has announced a partnership with Google to boost its online presence. The brand hopes the partnership will enhance its innovation capabilities through data, integrating Google's Cloud Retail Search solution into its fnac.com and darty.com websites and streamlining the product discovery process.

Going green

Elsewhere, the French circular economy marketplace scene is growing, thanks to renewed efforts to clean up waste. There are moves to end single-use plastic packaging by 2040.

From January this year, marketplaces must collect a unique identification number on any products covered by the Extended Producer Responsibility (EPR) scheme (which helps finance management of waste generated by any sales activity). The new rules mean that any marketplaces

Which of these online shops have you bought something from in the past 12 months?



Note: Survey conducted in 2021. Results include 205118-64 French respondents. Respondents could select multiple answers.
Source: Statista Global Consumer Survey

© 2022 Retailix 2022

“Any marketplaces selling and delivering EPR products on behalf of third-party merchants will be subject to waste financing obligations”

selling and delivering EPR products on behalf of third-party merchants will be subject to waste financing obligations.

Return and repair startup Back Market recently became another of the country's unicorns and the country's most valuable startup. Hot on its heels is Paris-based Ankorstore, an online marketplace allowing up-and-coming brands to sell directly to independent shops. It will be interesting to see how this ecosystem develops.

[1] <https://fortune.com/2020/05/20/amazon-warehouse-shutdown-france/>
[2] <https://www.bloomberg.com/news/articles/2022-04-04/amazon-s-warehouse-plans-keep-being-axed-by-french-campaigners>

Covid-19

A slow return to post-pandemic normality

French retail is slowly getting to normal after the COVID-19 pandemic but companies who catered to newly-online customers remain in the strongest position to recover.

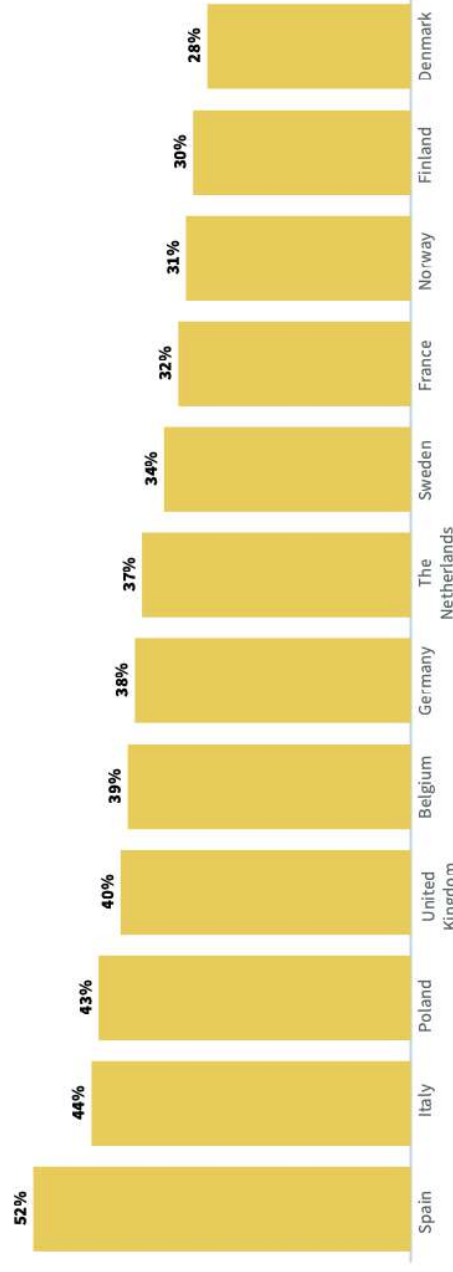
As elsewhere in Europe, the COVID-19 crisis accelerated a digital transformation of the retail sector – with companies forced to move online as businesses and stores shuttered across the country in early 2020.

But even when retailers and other businesses slowly reopened amid the nationwide vaccination roll-out in 2021, public health restrictions, such as masks in many indoor settings, remained across the country.

Vaccine passes were also required to access shopping centres, bars, restaurants, theatres, stadiums and other entertainment venues. Also impacted by often tight travel restrictions, France's leisure and tourism sectors have been particularly badly hit by COVID.

Despite French consumers remaining wedded to traditional methods of shopping, the majority of shoppers are comfortable with using ecommerce.

Percentage of people who shopped online more during the Covid-19 pandemic



Note: Online survey conducted in 2020 and 2021. Results include 12000 interviews with consumers in Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Poland, Spain, Sweden and the UK. The interviews were conducted with representative nationwide samples of private individuals aged 15-79 years; the number of respondents may vary somewhat around 1,000 between the countries.
Source: PostNord

© 2022 Retailix 2022

In 2020, internet sales reached €112.2 bn, marking a yearly increase of 8.5% compared to 11.7% in 2019, before the pandemic hit, according to the most recent annual report from Fevad, France's Federation of E-commerce and Distance Selling.

Nearly a third (32%) of shoppers in France also shopped more online during the pandemic, although this was lower than other major European countries including

Spain (52%), Italy (44%), Poland (43%) the UK (40%) | and Germany (38%), our research shows.

This is perhaps reflective of the French ecommerce market being just below the European average for internet penetration. Government initiatives to improve access, particularly in rural areas, are forecast to boost the number of online shoppers.

Health risk fears moved shoppers online

Much of the increase in internet shopping during the pandemic was due to the fear of health risks, with more than half of consumers saying that's why they avoided instore shopping.

Meanwhile nearly half said they purchased online to avoid public health restrictions in shops, perhaps indicating why many continued with ecommerce as lockdowns eased.

As many as six in 10 French consumers have admitted changing their shopping behaviour during the pandemic, with omnichannel shopping now mainstream – except when it comes to essential goods such as food and drink, home and personal care.

For example, some 47% of people research and purchase their household goods instore, compared to 50% who use omnichannel retail and just 3% who do so online only. Similar trends can be seen for groceries and personal care.

B2C ecommerce has particularly accelerated during the pandemic. Mobile commerce, C2C, social commerce, and click-and-collect services have all seen a large rise in usage. Even local food grocers and traditional farmers' markets suppliers have developed their online presence to sell their wares. Click and reserve services are also increasingly popular.

In addition, COVID-19 saw many consumers turn

towards more sustainable buying habits both in terms of environmental and financial impact. France saw a rise in demand for secondhand or refurbished items, with sales on marketplaces accounting for more than 30% of ecommerce sales.

French economy rebounds post-COVID

Moving forward, those retailers which developed their online presence during successive lockdowns are most likely to thrive as France moves into the post-pandemic era. This flexibility of approach will continue to benefit businesses in the coming months and years.

The faster-than-expected bounceback was hailed by finance minister Bruno Le Maire as being a sign of the end of the economic crisis, although sectors such as tourism were still struggling.

Consumer confidence is also on the up. Around a third of consumers are now optimistic the economy will rebound and about half expect a return to normal in 2022, a figure which rises to two-thirds among Gen Z. One forecast predicts that France's ecommerce revenue will grow to \$23.1 bn in 2025.

Generational differences in shopping

Interestingly, there seems to be some generational differences in what people want to spend their money on as we move beyond COVID. Gen Z's top priority for spending their hard-earned cash is on apparel, while Baby Boomers are more likely to want to eat out and go travelling.

When targeting certain age groups, retailers should remember that browsing in stores for research purchases is still the most popular way of shopping, particularly for older shoppers, even post-pandemic. But younger generations are more likely to be influenced by social media and other online channels.

Overall, the scene looks relatively positive for ecommerce retailers, especially those who can leverage those changes in buyer behaviour and extra expenditure as the French economy continues to recover. Staying flexible and offering customers a range of purchase and delivery options will be key.

Largest 100

What does RetailIX data say about the Largest 100 retailers currently selling within France?

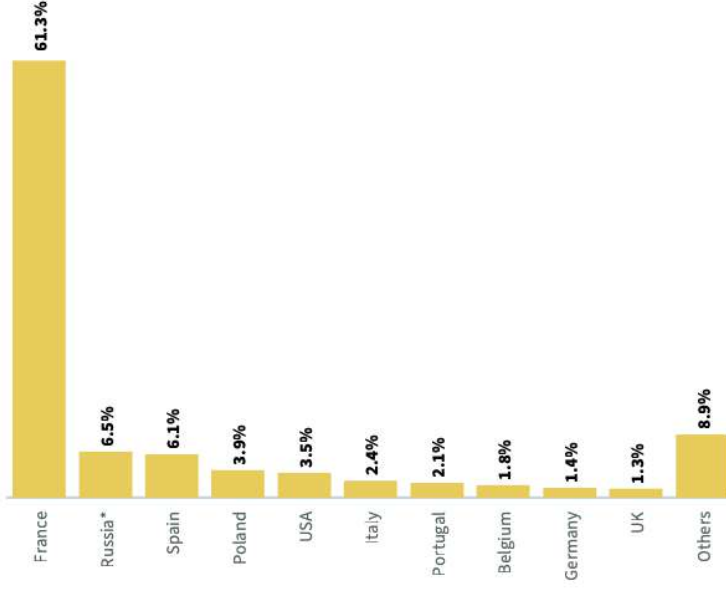
For anyone investing in the French market, the best way to understand the commercial opportunities is to understand online global shopping behaviour and France's role in this.

Web traffic insights demonstrate how shoppers from across the world visit French ecommerce sites. They also show how much French consumers are researching other markets while deciding which products to buy.

RetailIX's work with SimilarWeb looks at customer visits to the Largest 100 websites in the French market. The research draws on web traffic analysis to determine key retailers selling into the French market and what local shoppers are looking for. It's also a fascinating snapshot of how French shoppers browse internationally.

Some 58% of the France Largest 100 retailers are headquartered in France, with the second spot going to the USA (19%). Nearly 63% of shoppers who visit the Largest 100 retailers are from France (followed by Russia at 6.5%).

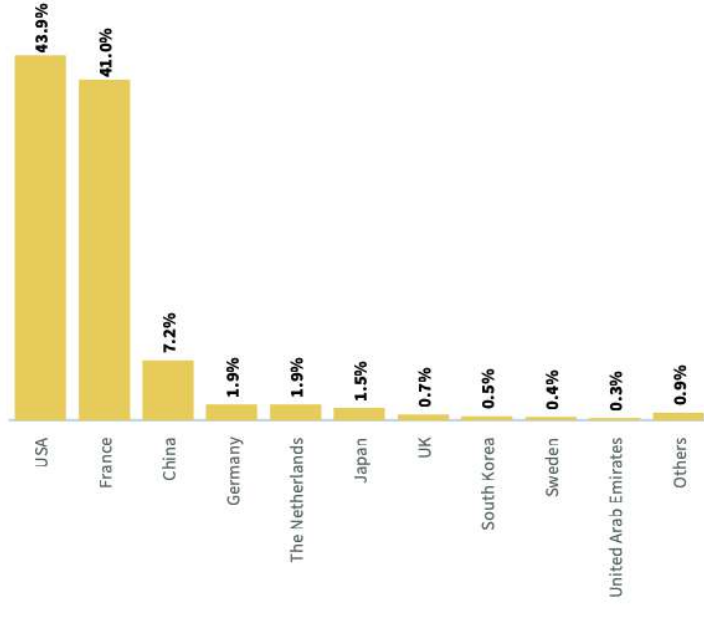
Countries from which shoppers visit the France-based Largest 100



Note: There are 51 France-based retailers among the France Largest 100. The Largest 100 are selected based on French consumer web traffic. *This figure applies to the web traffic just prior to economic sanctions being taken against Russia.
Source: RetailIX, drawing on data from SimilarWeb

© 2022 RetailIX 2022

French web traffic to the Largest 100 retailers, by country of headquarters



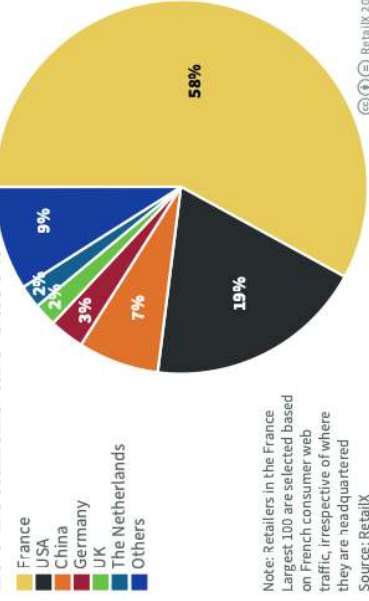
Note: Retailers in the France Largest 100 are selected based on French consumer web traffic. Data based on 88% of the Largest 100.
Source: RetailIX, drawing on data from SimilarWeb

© 2022 RetailIX 2022

A decent percentage of online visits to the Largest 100 retailers go to multi-sector stores. These attract 45% of retail traffic, up on last year (32%).

Consumer electronics shops again bagged the second largest online share, at 16%, followed by fashion at 7.9%, down considerably from 13.8% last year. Fashion shops have been particularly hit by ongoing lockdowns restricting non-essential retailers. Although click-and-collect has proved popular, smaller fashion outlets have continued to suffer from people not able to go out and try clothes on in person. DIY/construction stores were down from 9.4% to 5.6%, reflecting a nation eager to get back outside.

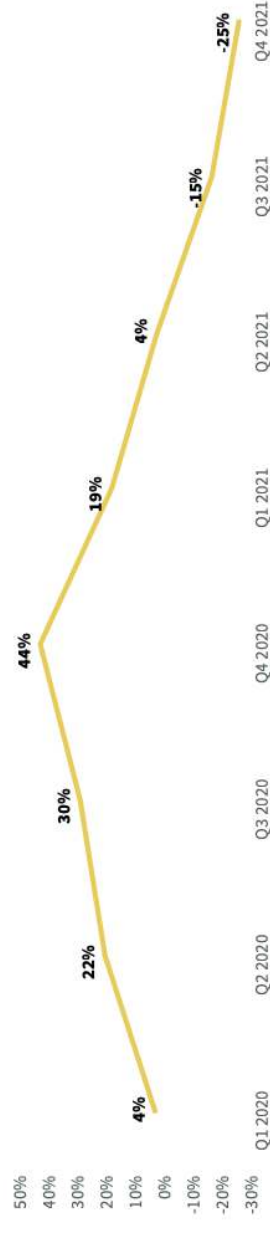
Countries where the France Largest 100 retailers are based



© 2022 Retailix 2022

How web traffic to the Largest 100 changed, 2020 – 2021

The change in web traffic from French consumers to the France Largest 100 retailers is shown as a fraction of the same quarter in the previous year

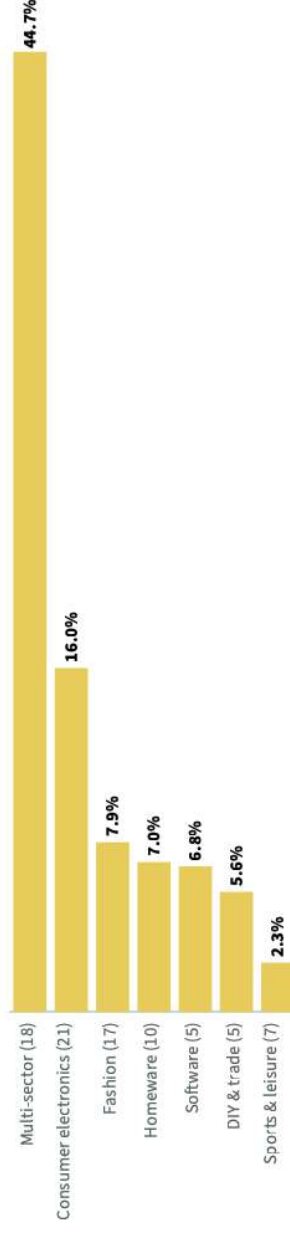


Note: Retailers in the France Largest 100 are selected based on French consumer web traffic, irrespective of where they are headquartered
Source: Retailix, drawing on data from SimilarWeb

© 2022 Retailix 2022

Web traffic by sector

The percentage of web visits to the France Largest 100 retailers from French 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 86% of the Largest 100.
Source: Retailix, drawing on data from SimilarWeb

© 2022 Retailix 2022

Figures & sources

Figures

Gross domestic product (GDP) growth rate in France between 2017 and 2022, in volume	3
Estimated yearly average e-commerce spending per capita in selected European countries, 2021	4
Share of online pure players in selected countries	5
What are the advantages to you of buying Christmas gifts online / in-store?	14
What stores are you planning to buy Christmas gifts from?	15
Where do you shop for Christmas gifts?	15
Which of these products and services are you interested in?	16
Mobile internet user penetration in France, 2016-2026	16
Which of the following devices have you used for online shopping in the past 12 months?	16
Average time spent daily on internet media devices by French users by type of device, 2017-2021 (in minutes)	17
Percentage of internet users	17
Percentage of internet users who shop online	17
Distribution of visits of independent cross-border export e-commerce platforms headquartered in China, by source country	18
Indices	19
Payment method preferences for online shopping in France	20
Which online payment services have you used in the past 12 months?	21
Which of these statements do you agree with?	22
Which of these do you consider good reasons to buy an item online?	23
Preferred online shopping channels for the holiday season in France in 2021	23

Retail e-commerce revenue forecast from 2017 to 2025 (in billion U.S. dollars)	23
Are you willing to pay EUR 3 extra for faster delivery?	24
Which of these services in the field of shopping would you like to use?	24
Are you willing to pay EUR 3 extra for more eco-friendly delivery?	25
Which of these do you consider good reasons to buy an item online?	25
When you order a product online, how do you prefer to have it delivered?	25
Share of French online stores with additional Amazon or eBay profiles	26
Which of these online shops have you bought something from in the past 12 months?	27
Percentage of people who shopped online more during the Covid-19 pandemic	28
Countries from which shoppers visit the France-based Largest 100 French web traffic to the France Largest 100 retailers, by country of headquarters	30
How web traffic to the Largest 100 changed, 2020-2021	31
Countries where the France Largest 100 retailers are based	31
Web traffic by sector	31

Sources

- Countries from which shoppers visit the France-based Largest 100 French web traffic to the France Largest 100 retailers, by country of headquarters
- How web traffic to the Largest 100 changed, 2020-2021
- Countries where the France Largest 100 retailers are based
- Web traffic by sector

RetailX(2022)

- Estimated yearly average e-commerce spending per capita in selected European countries, 2021- page 6
- Payment method preferences for online shopping in France- page 27
- Are you willing to pay EUR 3 extra for faster delivery?- page 25

- Are you willing to pay EUR 3 extra for more eco-friendly delivery?- page 25
 - When you order a product online, how do you prefer to have it delivered?- page 23
 - Percentage of people who shopped online more during the Covid-19 pandemic- page 14
- PostNord (2021). *E-commerce in Europe. Data used with thanks to PostNord. The full report can be downloaded at: <https://www.postnord.se/en/business-solutions/e-commerce/e-commerce-reports/e-commerce-in-europe>*
- Share of online pure players in selected countries- page 30
 - Which of these products and services are you interested in?- page 12
 - Which of these services in the field of shopping would you like to use?- page 15
 - Share of French online stores with additional Amazon or eBay profiles- page 26
- eCommerceDB (2021). *eCommerce in France 2021. Data used with thanks to eCommerceDB. The full report can be downloaded at: <https://www.statista.com/study/69516/e-commerce-in-france/>*
- Which online payment services have you used in the past 12 months?- page 78
 - Which of these do you consider good reasons to buy an item online?-page 26
- Statista (2021). *The French consumer. Data used with thanks to Statista. The full report can be downloaded at: <https://www.statista.com/study/108094/the-french-consumer/>*
- Gross domestic product (GDP) growth rate in France between 2017 and 2022, in volume
- <https://www.statista.com/statistics/527788/gross-domestic-product-growth-france-euros/>
- What are the advantages to you of buying Christmas gifts online / in-store? <https://www.statista.com/statistics/1190680/advantages-buying-christmas-gifts-online-french-consumers-by-age/>

- What stores are you planning to buy Christmas gifts from? https://www.statista.com/statistics/1280685/leading-retailers-christmas-gift-shopping-france/
- Where do you shop for Christmas gifts? https://www.statista.com/statistics/1280491/christmas-gifts-online-shopping-france/
- Mobile internet user penetration in France, 2016-2026 https://www.statista.com/statistics/567773/predicted-mobile-internet-user-penetration-rate-in-france/
- Which of the following devices have you used for online shopping in the past 12 months? https://www.statista.com/forecasts/998259/online-purchases-by-device-in-france
Average time spent daily on internet media devices by French users by type of device, 2017-2021 (in minutes) https://www.statista.com/statistics/1089737/average-time-media-device-usage-france/
Percentage of population using the internet RetailIX. Drawing on data from Worldbank https://data.worldbank.org/indicator/IT.NET.USER.ZS
Percentage of internet users who shop online RetailIX. Drawing on data from Eurostat http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tin00096&lang=en

Distribution of visits of independent cross-border export e-commerce platforms headquartered in China, by source country https://www.statista.com/statistics/1272860/china-leading-market-for-chinese-independent-cross-border-e-commerce-sites/
Leading markets of origin of cross-border online purchases in France as of 2021, by market share https://www.statista.com/statistics/1283683/countries-from-which-online-shoppers-purchased-in-france/
Which of these statements do you agree with? https://www.statista.com/forecasts/998225/attitudes-towards-online-shopping-in-france
Preferred online shopping channels for the holiday season in France in 2021 https://www.statista.com/statistics/1187708/christmas-shopping-intentions-france/
Retail e-commerce revenue forecast from 2017 to 2025 (in billion U.S. dollars) https://www.statista.com/forecasts/478017/e-commerce-revenue-forecast-in-france
Which of these online shops have you bought something from in the past 12 months? https://www.statista.com/forecasts/998188/online-purchases-by-brand-in-france

Sources for indices

Logistics Performance Index (2018) https://lpi.worldbank.org/international/scorecard/radar/254/C/FRA/2018#chartarea
Ease of Doing Business Index (2020) https://www.doingbusiness.org/en/rankings
E-Government Development Index (2020) https://publicadministration.un.org/egovkb/en-us/Data/Country-Information/id/61-France
Integrated Index for Postal Development (2IPD) (2021) https://www.upu.int/UPU/media/upu/publications/Postal-development-report-2021.pdf
Internet Inclusive Index (2021) https://theinclusiveinternet.eiu.com/explore/countries/performance
Availability https://theinclusiveinternet.eiu.com/explore/countries/performance?category=availability
Affordability https://theinclusiveinternet.eiu.com/explore/countries/performance?category=affordability
Relevance https://theinclusiveinternet.eiu.com/explore/countries/performance?category=relevance
Readiness https://theinclusiveinternet.eiu.com/explore/countries/performance?category=readiness

Conclusion

The entire world is still reeling from the effects of the pandemic, Brexit and, now, military unrest. On top of this, France has the upcoming election and the uncertainty around delivery of financial promises to contend with.

However, back in January the European Commission endorsed a positive preliminary assessment of the country's payment request for €7.4bn of grants under the Recovery and Resilience Facility (RRF). The money is earmarked for reforms in the areas of public finance, housing, mobility, unemployment insurance, skills, and health.

At the time of writing, France had lifted most COVID-19 restrictions, removing the need to wear face masks in most settings and allowing people who aren't vaccinated back into restaurants and other public venues. Exactly what shape the country will be in this time next year, the last few years have demonstrated it's impossible to predict. What we do know is that these are challenging times and retailers have had to devise creative ways to deal with the upheavals.

Whatever happens, 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

RESEARCH:

Researcher Anna Segarra Fas

For questions about our research and to send feedback, please email Anna via: research@retailx.net

Head of Research Martin Shaw

CEO Ian Jindal

EDITORIAL:

Managing Editor Hazel Davis

Production Editor Gary Tipp

DESIGN:

Art Editor Daniel Tero

MARKETING:

Marketing and Circulation Addison Southam

marketing@retailx.net

SALES:

Commercial Director Andy James andy@retailx.net

Group Creative Solutions Director Marvin Roberts

marvin@retailx.net

We update the region reports every year and more regularly at www.retailx.net. Subscribe to get updates and access to additional charts: www.retailx.net/my-account

The Ecommerce Country and region Reports are published by Global Retail Research BV, a subsidiary of RetailX, and distributed to a variety of media partners. To become a distribution partner, please contact marketing@retailx.net
© RetailX Limited, 2022.

This report may not be stored in a retrieval system, distributed or sold in whole or in part without the publisher's express permission. Fair quotation is encouraged, with a link to the report's URL on RetailX.net. All charts and figures marked with  are provided under the Attribution-NoDerivatives 4.0 International (CC BY-ND 4.0) license (<https://creativecommons.org/licenses/by-nd/4.0/>). You are welcome to use these in full with a link to this report, retaining the copyright notice  © RetailX 2022.

This report is based upon our reasonable efforts to compile and analyse the best sources available to us at any given time. Opinions reflect judgment at the time and are subject to change.

RetailX

123 Cannon Street,

London, EC4N 5AU

Tel: +44 (0) 20 7062 2525

Printed in Great Britain.

Global Retail Research BV

Van Heuven Goedhartlaan 13D

1181LE Amstelveen

The Netherlands



RETAILX