Adobe

EMEA REPORT 2021

Getting eCommerce right in the 2020s.

How retailers can delight and convert shoppers online.

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For retailers across EMEA, the last two years have been tumultuous, to say the least. From lockdowns to supply chain disruption and mounting awareness of the climate crisis, the world and its shoppers have been forced to transform—and every fresh disruption has brought new challenges to grapple with.

But the flipside of challenge is opportunity. Today's consumer has new expectations, higher appetites for eCommerce and accelerating digital savviness—and for retailers who can respond in kind, there are new customers to be won and loyalty to be cemented.

The key to doing so successfully? Being armed with insight about the 'how, when, and why' of online shopping in the coming decade. Because as this year's consumer research shows, retailers who get eCommerce right can expect to enjoy big rewards.

Methodology.

In October 2021, Adobe carried out 9565 interviews with consumers across EMEA who had shopped online in the last year.

Number of interviews

UK	**1000**
UAE	**1006**
Sweden	**1004**
South Africa	**1003**
Israel	**1009**
France	**1007**
Germany	**1005**
Italy	**509**
Netherlands	**506**
Poland	**508**
Spain	**505**
Switzerland	**503**

“By shopping almost exclusively online for over a year, consumers have realised the immediacy and convenience it has to offer. Now they’re looking for more.

Peter Bell
Senior Director UKI Enterprise Marketing & EMEA Commercial Marketing
Adobe

Key takeaways.

1

Device shift
Consumers are now more likely to use a smartphone (78%) than a laptop/desktop (64%) to shop online.

2

Online confidence
In the last 12 months, 44% have bought something online from a retailer they hadn't used before.

3

Tech savvy
70% would like to see more virtual reality used in online shops.

4

Clear price
Easy to find pricing is the most valued (63%) website content feature.

5

Personalised experiences
64% would like to see retailers personalising in-store and online experiences based on online preferences and behaviours.

6

Online impact
56% say their digital interactions with retailers impact their overall experience of that retailer more than in-store shopping.

7

Micro-experiences
65% are revisiting websites more frequently before buying than they were 12 months ago.

8

Values first
87% say that the things they care about are playing a greater role in how and where they choose to shop.

9

Environmental responsibility
58% say they are more likely to switch or stop using a brand if what they do or say goes against values that are important to them.

SECTION ONE

How, when, where: eCommerce behaviours in 2021.

It's no surprise to anyone that—as our 2020 report proved—online *and* offline shopping behaviours changed drastically over the first year of the pandemic. But as this year's findings show, behaviours and preferences are continuing to evolve, with online shopping growing even as the world looks towards the future.

How are consumers buying online?

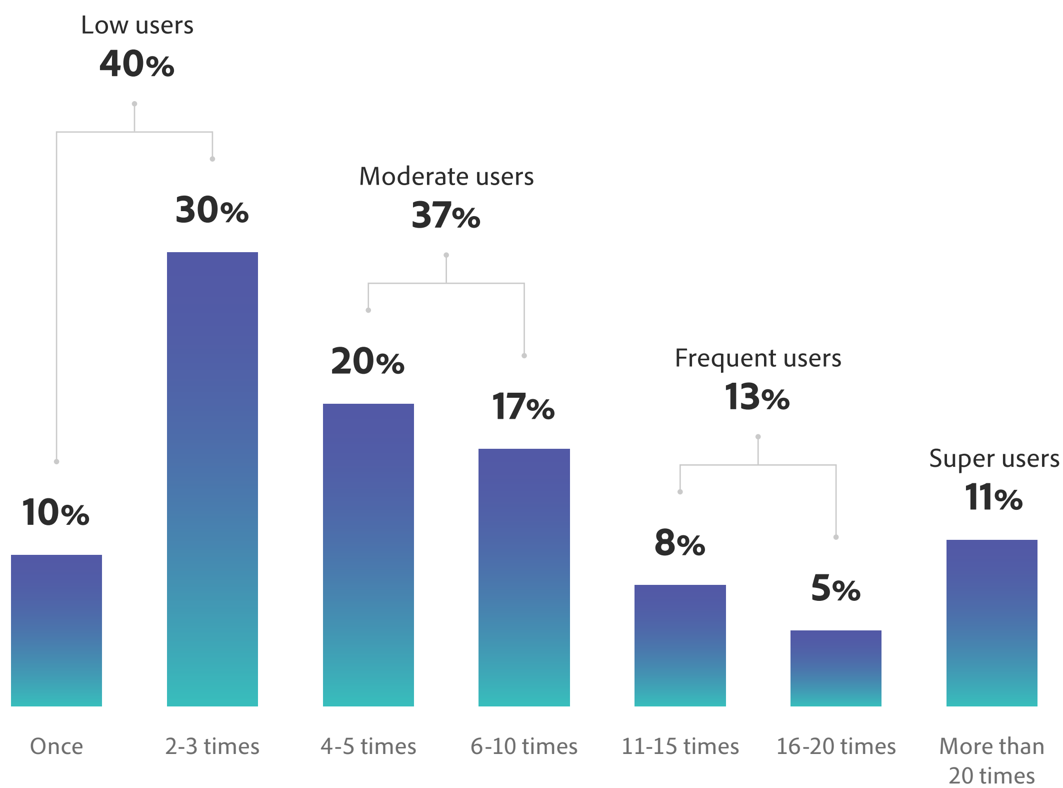
To design relevant, engaging online experiences, retailers must start with an understanding of *how* consumers are shopping. In our 2020 report, consumers were more likely (45%) to use a laptop than a smartphone (36%). Now, the balance has shifted with innovations like Apple Pay removing conversion roadblocks by securely remembering their delivery and payment information, allowing shoppers to pay with a single tap on the Touch ID sensor. Of our respondents, 78% had used a smartphone to shop online in the last year, compared to 64% for laptops.

Of that 78%, shoppers are fractionally more likely (38%) to have used a retailer's mobile app, compared to a website (30%) or equal use of either—so retailers should be as mindful of their app-based experiences as their browsers.

Online shopping remains frequent, even as stores open.

As for frequency, the majority of those who shop online do so moderately—between 4-10 times a month. Almost a quarter of shoppers are 'frequent' or 'super' users, with 11% shopping more than 20 times a month. This breakdown maps closely to our findings from the year prior—showing that, even with physical shops now open in most locations around EMEA, online shopping frequency hasn't decreased.

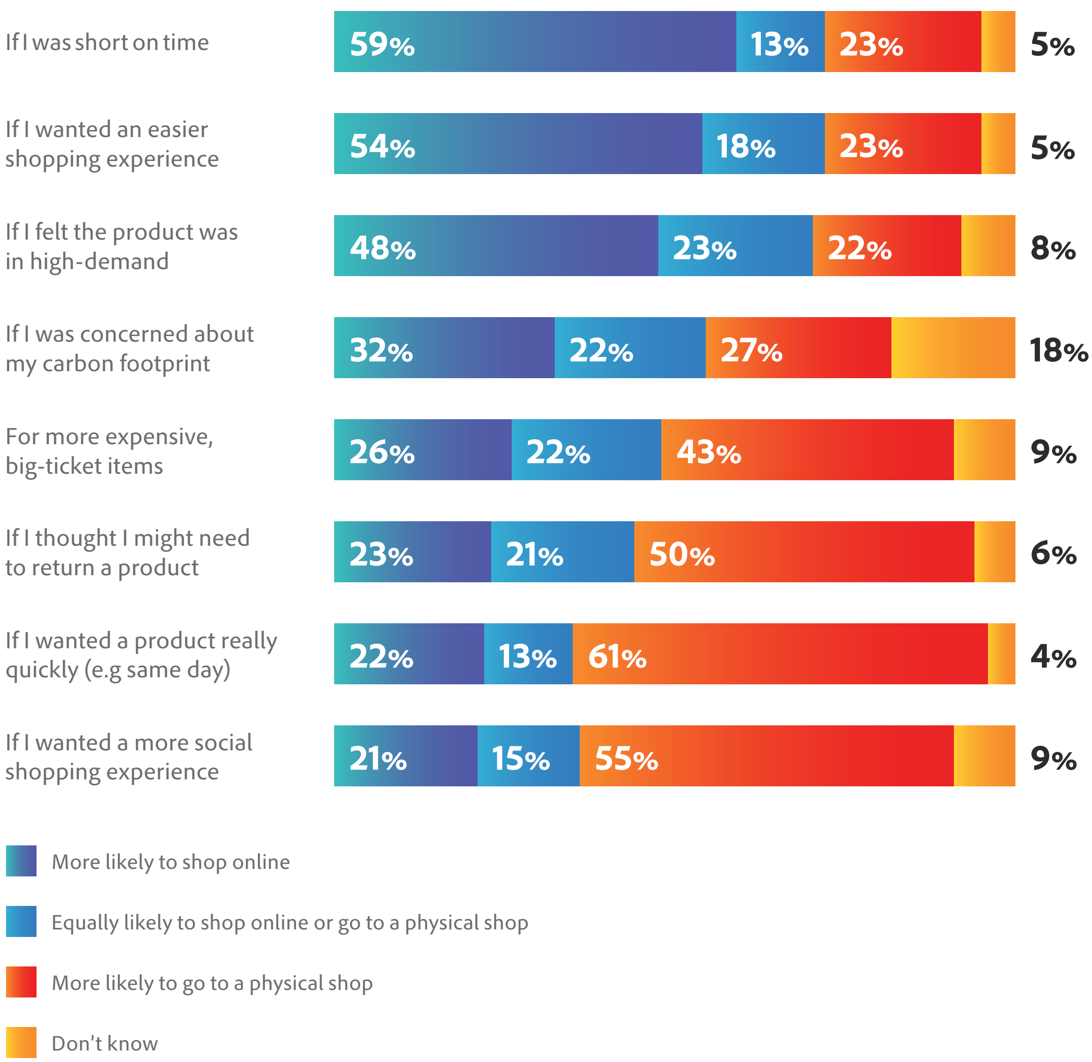
How often have you bought goods such as food, gifts, flowers, clothing, furniture or books online in the past 3 months?



The ‘why’ of ‘where’ consumers shop.

The leading drivers of *why* consumers shop online instead of in-store are convenience, ease and a belief that the product is in high demand. Shoppers are still more likely to visit a physical store to get products on the same day, or if they think it's likely they'll return a product.

Lack of time and ease (=convenience) driving online shopping Stores hold strong on social, returns, big ticket items and same day requirements—can online do more?

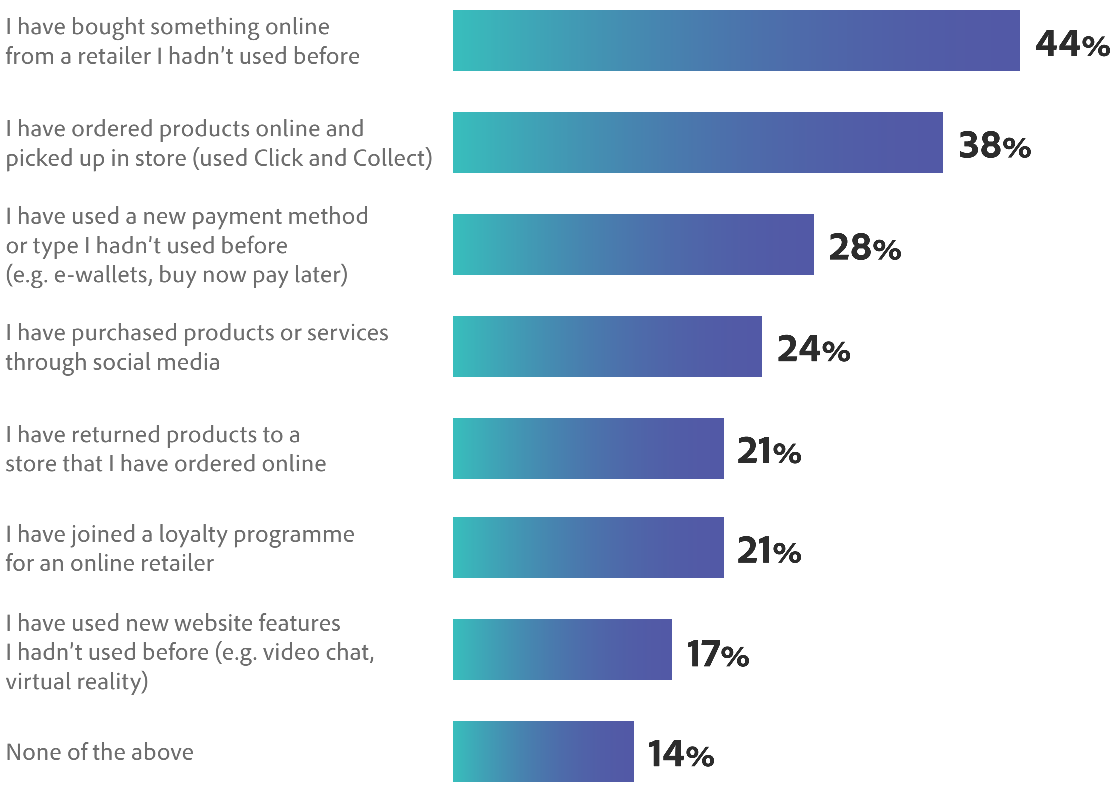


Online shopping confidence is growing.

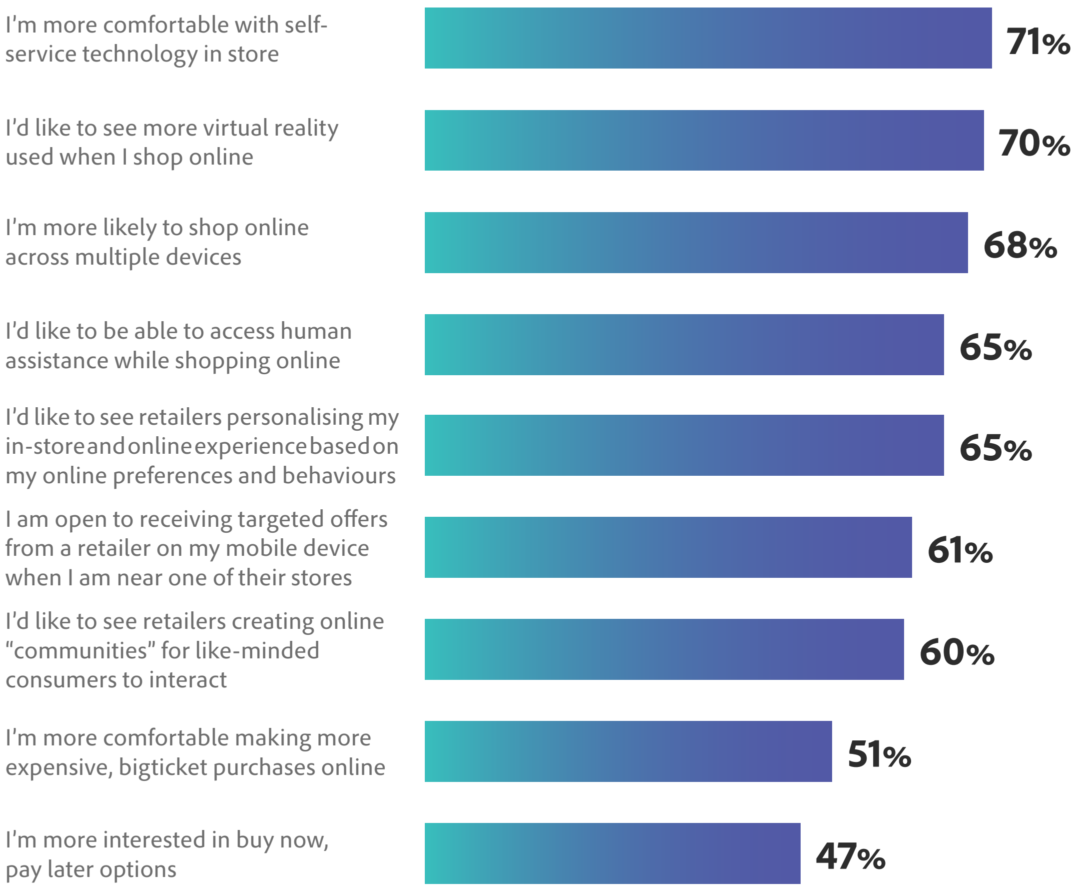
Perhaps most interesting is that shoppers across various demographics are demonstrably more comfortable with eCommerce and have become more open to new experiences at every stage of the buyer journey.

As shoppers grow in confidence online, expectations shift too, from comfort with technology to confidence in spending. Over half (51%), for example, are now happier to make more expensive, big-ticket purchases online, which could be a big opportunity for retailers.

In the last 12 months, people have tried new things.



Experiences and expectations have changed.
% saying yes definitely or yes probably.



The more you shop online, the greater the openness to new experiences—21% of super users have used new website features in the last 12 months, compared to 13% of low users.

Demand for online shopping is growing.

Critically, the widespread easing of lockdown does not lead consumers to think they'll do less online shopping. Half expect to shop about the same amount online, despite shops being open in most parts of the world—while 44% actively expect to shop online more.

This highlights that the role of eCommerce in any retail strategy will only grow in importance, even for those retailers with a strong physical presence.

What has changed forever?
Consumer behaviours have changed—and some shifts are set to stay. For example, 70% would now like to see more virtual reality used online (e.g. to see furniture in their home), compared to just 32% in last year's survey. This huge increase highlights that shoppers may not always report an appetite for innovative digital shopping experiences—but the scale and frequency at which they've embraced new technologies in the last two years show that once they get used to them in practice, demand can spiral.

The stage is set.

There's no putting the genie back in the bottle when it comes to eCommerce. As demand for online shopping grows, merchants have a huge opportunity to win sales and drive growth.

But to do this successfully, they must offer eCommerce experiences that delight and convert shoppers. So—what are consumers expecting to see? What do great eCommerce experiences look like? And how can merchants deliver?

44%

Shoppers are more open to new experiences than ever before—and 44% expect to shop online more in the coming 12 months.

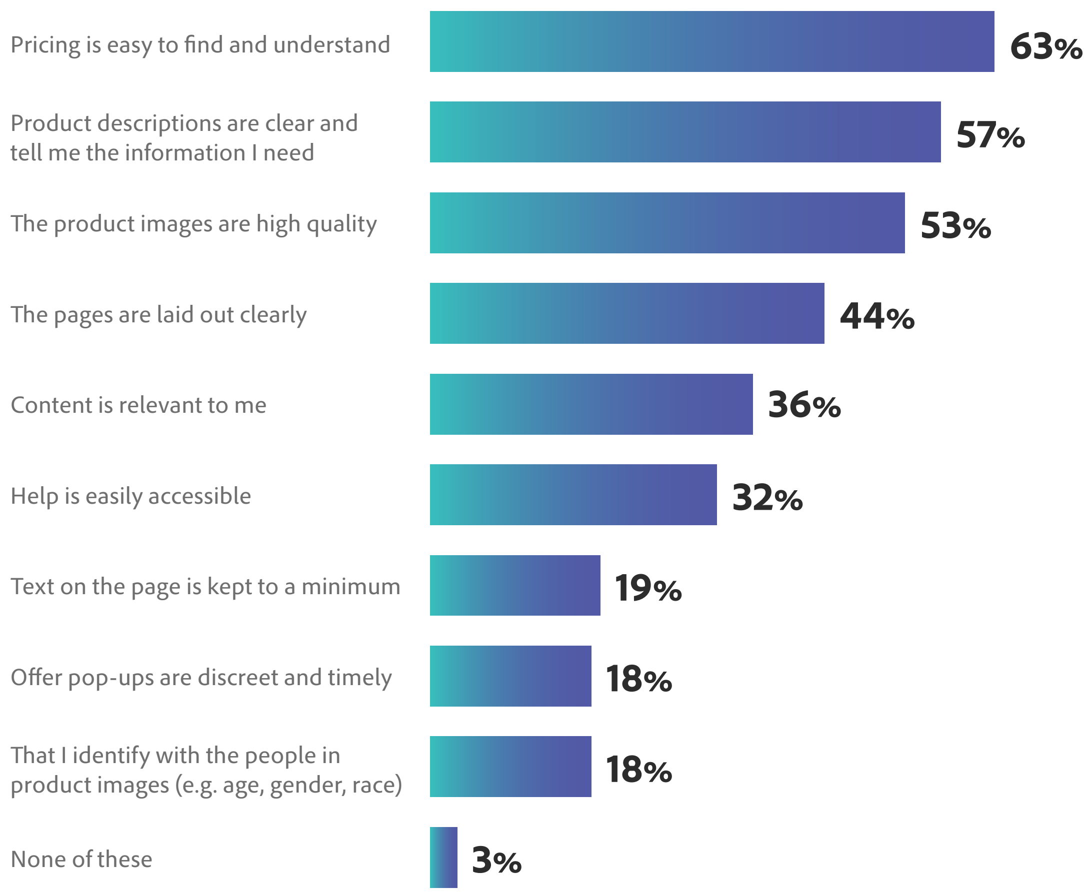
SECTION TWO

Creating exceptional experiences in eCommerce and beyond.

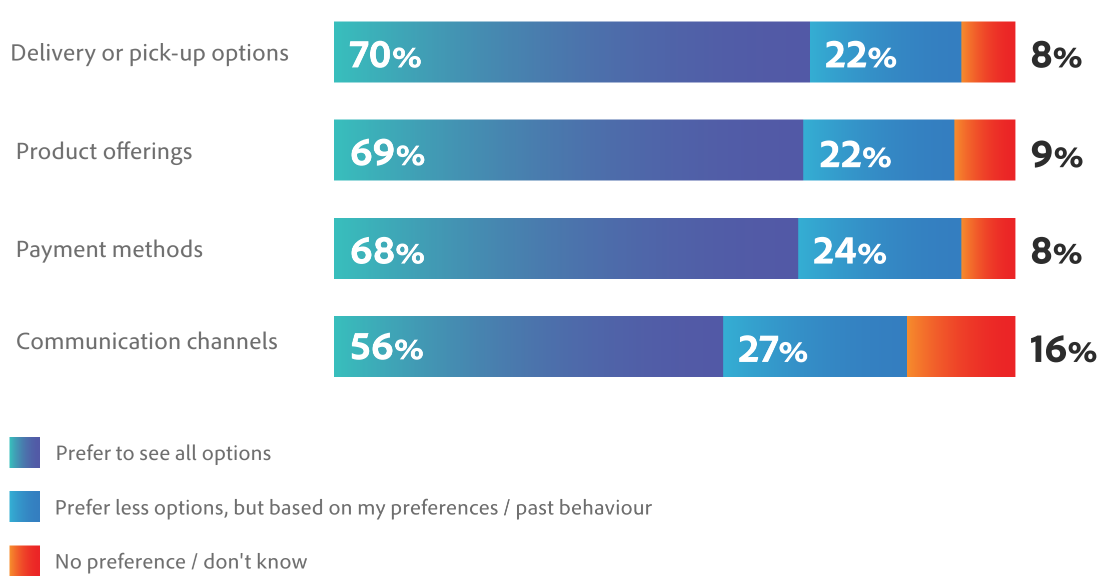
Clear pricing, strong product descriptions, high quality images: certain facets of the eCommerce experience and website content will always remain important. Consumers must be able to navigate websites or apps with ease and get a clear sense of exactly what it is they're buying.

But other preferences, while perhaps less obvious, can be just as important to get right. The need to balance choice with personalisation is a key example of this. Broadly speaking, consumers value being able to see a range of options within their eCommerce journey—be that delivery options, product offering, payment methods or communication channels.

Factors most valued in website content.



Choice is particularly important for delivery, product and payment methods although there are key preferences in delivery and payment.



The impetus for getting online experiences goes beyond simply driving sales. **Over half (56%) of consumers say their digital interactions with retailers impact their overall experience of that retailer more than in-store shopping**, so there's tangible pressure to get the eCommerce experience right to protect brand reputation.

However, shoppers would also like to see more personalisation and experiences tailored directly to them. For example:

- 64% would like to see retailers personalising in-store and online experiences based on online preferences and behaviours, rising to 70% for frequent users. This could be based on in-store purchases, online browsing and purchasing patterns, and interactions with in-store salespeople.
- Six in ten would be open to receiving targeted offers to their mobile when physically near a store—indicating an appetite for their data to be used, providing they receive something valuable in return.
- 37% list 'only seeing products and offers relevant to me' as a factor that provides a truly rewarding online shopping experience.

A complex, changing consumer.

From purchase to the first visit, 65% of consumers now say they are revisiting websites more frequently before buying than they were 12 months ago. This rise in ‘micro-experiences’ is true across all categories—even in areas like food and groceries, where you might expect consumers to only visit the site with the intention to complete an order there and then.

In an ideal world, consumers would convert quickly after visiting a website or app—and they wouldn’t actively plan to over-order and then return unnecessary items, creating unpredictable stock levels and extra admin for merchants.

Visiting a website more than once before making a purchase.

% saying they agree.

Optimising micro-experiences to drive sales.

Fortunately, there are ways to optimise these ‘micro-experiences’ and speed up the time to sale. Part of the solution lies in addressing operational issues, as reflected by the top three factors that drive a purchase.

However, the top factors that encourage a *quick* purchase involve tailoring and streamlining the eCommerce experience.

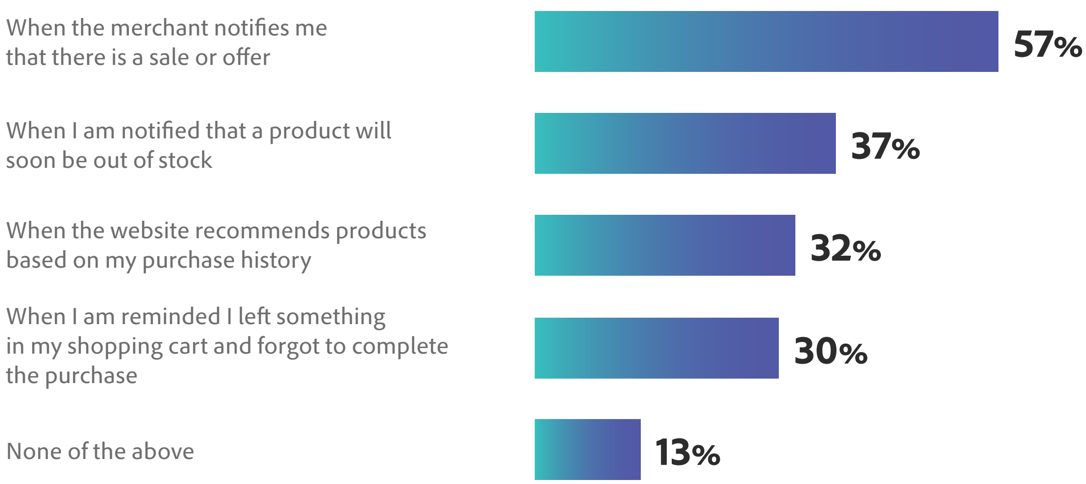
Most important factors for purchase / repurchase.

> “Most merchants can attest to the fact that eCommerce personalisation and tailored offers can drive sales, even if consumers report wanting choice over personalised experiences based on their data. The gap here may come from consumer perception: some can be resistant to their thought of their personal data being used, even if the ultimate outcome is a better experience. The key here is for merchants to use data in a way that adds real value, rather than too obviously serving the merchant’s agenda.
>
> **Peter Bell**
> Senior Director UKI Enterprise Marketing & EMEA Commercial Marketing
> Adobe

In short: retailers have a wide range of bases to cover in order to deliver exceptional experiences. But there is clear guidance on what ‘good’ looks like, in terms of the on-page look and feel of eCommerce sites or apps, the practical elements of online shopping, and the balance of choice with personalisation and simplicity.

But that’s not quite the end of the story. As the final section of our report explores, there’s one more major shift at play that retailers must respond to.

Factors that ‘encourage’ a quick purchase.

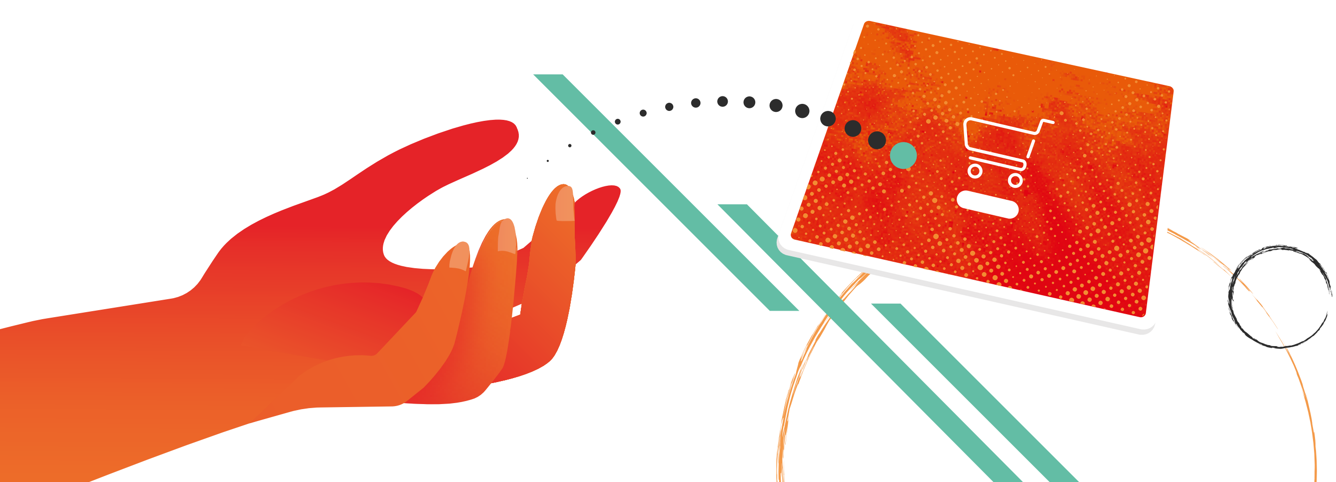


SECTION THREE

The considered consumer: mindful choices and values-driven purchasing.

Consumer preferences and expectations are undoubtedly changing, but this evolution goes beyond the on-page experiences of eCommerce. Increasingly, consumers are being driven by their values, beliefs and ethics, as well as their practical concerns.

For merchants, responding to this shift is the final piece of the puzzle to continue to drive sales and loyalty—and there's a real urgency for doing so since six in ten (58%) shoppers say they are more likely to switch or stop using a brand if what they do or say goes against values that are important to them.



A global, more mindful consumer.

Across EMEA, almost nine in ten (87%) shoppers now say that the things they care about are playing a greater role in how and where they choose to shop. This is true across the entire region, with no country in our survey reporting a figure lower than 81%.

Things consumers care about affecting how and where they shop.

% saying yes definitely or yes probably.

UK **84%**	UAE **96%**	Sweden **83%**	South Africa **93%**
Israel **86%**	France **81%**	Germany **83%**	Italy **83%**
Netherlands **82%**	Poland **87%**	Spain **88%**	Switzerland **85%**

Creating empathetic interactions.

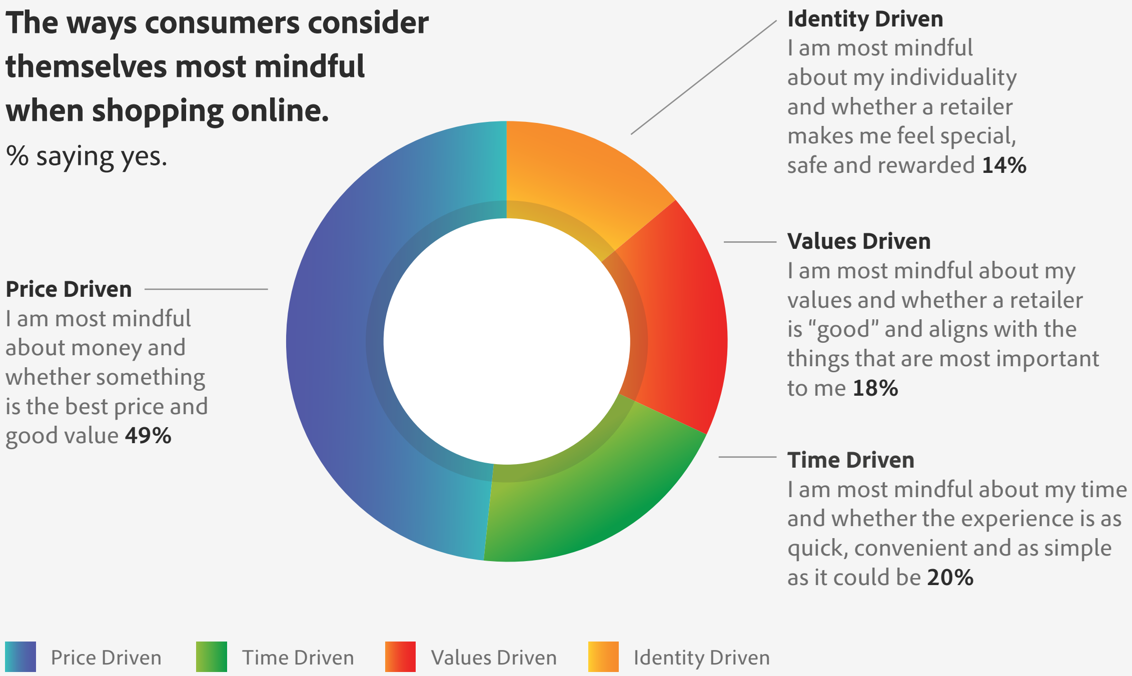
Consumers are hyper aware of the world they now live in. They're engaged in the important discussions surrounding issues like climate change and employer abuse, and are committed to participating in movements that challenge inequalities in society.

The task for merchants is to understand and respond to these values. Unsurprisingly, cost is still the most important driver for shoppers overall—merchants *have* to demonstrate good value, and price comparison will be critical, particularly at a time when it's never been easier to shop around online for the same or similar products.

Merchants also have a clear impetus to make experiences as quick and simple as possible, with a fifth of consumers saying this influences their purchasing. As discussed earlier, personalisation and tailored offers can help here, driving consumers to their ideal product in as few steps as possible.

The ways consumers consider themselves most mindful when shopping online.

% saying yes.



But values and individual identity are fast becoming important considerations. Almost a fifth (18%) now say they are most conscious that a retailer aligns with their values, while 15% are most mindful that a retailer makes them feel special, safe and rewarded.

The green imperative.

It's widely expected (and often discussed) that the importance of personal values and personal identity as a driver of choice will continue to grow in the coming years. As it stands, consumers expect brands to boast better credentials across a range of environmental and social governance issues.

For example:

- 43% would actively support brands that are environmentally responsible.
- 38% would support those that prioritise employee welfare.
- 37% would support brands that are financially trustworthy (e.g. they pay their taxes).
- 36% would support brands that provide full supply chain transparency.
- 32% would support brands that have a strong diversity and inclusion ethos.
- 29% would support brands that use organic ingredients.

Transparent product sourcing (47%) and minimal packaging (45%) are the top environmental measures that would drive shopper choice. This is followed by evidence the retailer evaluates their supply chain to minimise emissions (36%), listing environmental policies online (33%), donating a percentage of revenue to environmental causes (32%) and not selling products that use single-use plastics (30%). Only 13% say environmental policies don't impact their habits at all.

The task for retailers.

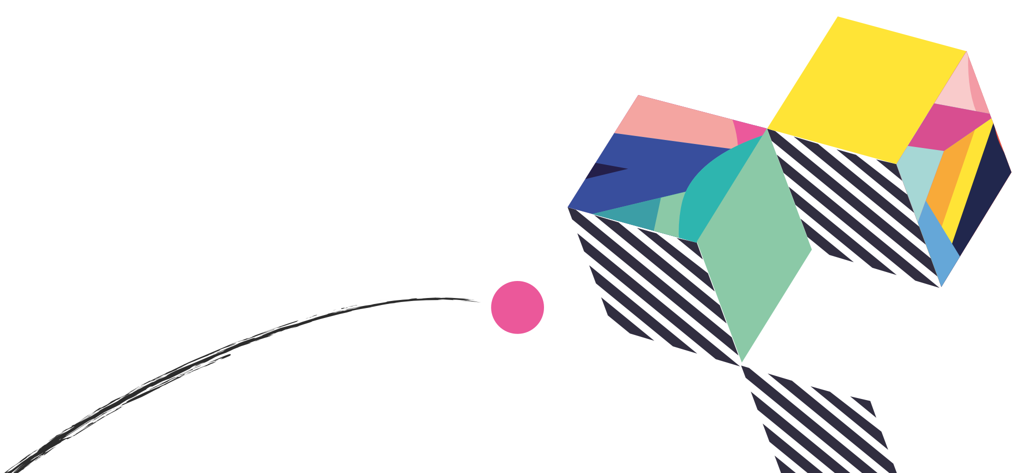
As shoppers become more considered in their shopping choices, the corresponding ask for retailers is to strive to become more empathetic and sensitive to these nuances.

As it stands, consumers don't think merchants are managing this well. Only 10% think retailers are very effective at designing online customer experiences that understand what customers want and need. While almost three quarters think retailers could be doing more to deliver experiences that show high levels of empathy with customers.

Fortunately, consumers also have a clear sense of what this looks like, which provides a strong steer for merchants attempting to evolve their strategies.

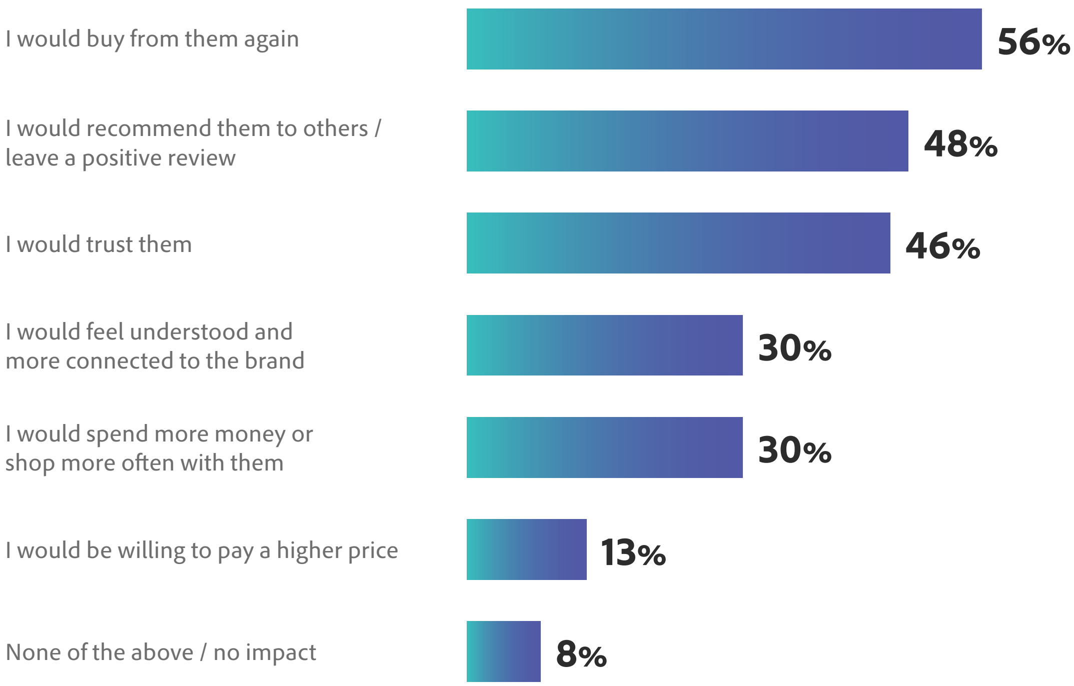
Shoppers are most mindful of:

- 49% are most mindful about money and whether something is the best price and good value.
- 20% are most most mindful about their time and whether their experience is as quick, convenient and as simple as it could be.
- 18% are most mindful about their values and whether a retailer is "good" and aligns with the things that are most important to them.
- 14% are most mindful about their individuality and whether a retailer makes them feel special, safe and rewarded.



Delivering all of this isn't easy—but it is well worth doing. Consumers report that a valued-based experience would drive them to buy from a retailer again, leave a positive review, or simply 'trust' the merchant in question more—and a small fraction would even be willing to pay a higher price for the same product, which is a trend to watch for the future.

Impact of values-based experience on shoppers.



CONCLUSION

Big challenges—with bigger opportunities.

Merchants have a lot to consider as they develop their eCommerce and in-store offerings over the coming years. As this research highlights, consumer expectations aren't just evolving—they're becoming more far-reaching, more varied, and in some cases, more complicated to meet.

What retailers can do to meet the moment:

- Make room for new shopping behaviours: everything from new brands, new payment methods, new delivery methods and new channels to new website features.
- Take a hybrid approach: as the lines between the online and in-store experience, consider how context is driving consumer behaviour.
- Get to purchase sooner: leverage mobile payment technologies that convert full baskets into completed orders.
- Prioritise empathy: money, time, values and identity all influence how and where consumers choose to shop.

But if consumer expectations are complicated, they're also well-defined. Consumers want clear, easily-navigable experiences, the freedom to choose balanced with simplicity and personalisation, and values-driven, environmentally-conscious brands. For retailers that can deliver this, the rewards of repeat custom and greater brand loyalty will follow.

About Adobe Commerce.

Adobe Commerce, part of Adobe Experience Cloud, is the leading commerce solution for merchants and brands across B2C, B2B and hybrid use cases and was named a leader in the 2020 Gartner Magic Quadrant for Digital Commerce and 2020 Forrester Wave for B2B Commerce. Adobe Commerce, powered by Magento, boasts a strong portfolio of cloud-based omnichannel solutions that empower merchants to successfully integrate digital and physical shopping experiences.

Adobe Commerce is the #1 provider to the Digital Commerce 360 Top 1000 online retailers for the tenth consecutive year and the Top 500 Guides for Europe and Latin America. Adobe Commerce is supported by a vast global network of solution and technology partners, a highly active global developer community and a robust eCommerce marketplace for extensions available for download on the Magento Marketplace.

For more information, visit business.adobe.com