eCommerce shift in Poland

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in co-operation with

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SYTHESIS

Synthesis

The pandemic and the fear of the coronavirus have increased the number of Poles buying online. 47% of consumers admit that they buy online more often than before the pandemic. The impact of fear of the virus on online shopping is also clearly visible. The corresponding percentage in the group most afraid of the coronavirus is 57%.

Every third Polish eCommerce customer is an "apostle" of online shopping. These are consumers who buy online more often than they did before COVID-19, but also they would feel seriously affected if they can not shop this way anymore. In other words, you could say a lot of Poles are eCommerce enthusiasts.

Polish consumers are very satisfied with online purchases. The average satisfaction rating with recent purchases is 8.7 / 10. This does not mean, of course, that Polish eCommerce is free of any flaws. **Poles indicate on average three barriers to online shopping, two of which relate to issues related to delivery.** What bothers us most is the need to pay for shipping (34%), that there is no possibility to try the product before buying (32%), and the fear of not receiving the package (27%).

The web is also a popular place to shop for Christmas gifts. More than half of Poles (64%) plan to purchase gifts via the Internet. In this group, younger consumers (18-39 years of age) are over represented, but this does not mean that older generations are digitally excluded. What may seem surprising, also **more than half of seniors 60+ (57%) plan to buy gifts online.**

The pandemic and the way how we live now also affects the list Christmas gifts. We note that the top category planned for this year as gifts bought online are books, movies and music (31%), which can help you have a good time at home. Other popular categories are cosmetics and perfumes (28%) and clothing and fashion (27%).

There is undoubtedly one category that is the winner of this year's Christmas – the electronics devices. As many as 17% of Poles declare that they want to donate a product from this category for Christmas. It is a peculiar sign of the times. On the one hand, electronic devices help to have attractive time spend at home, and on the other hand, we probably use Christmas as an excuse to buy equipment for study and work in COVID-19 conditions.

ANALYSIS

eCommerce shift in Poland in a few words

The Covid-19 crisis, a booster for online shopping in Poland

As most of the European countries, Poland is facing an important upsurge of COVID cases. Measures limiting the direct contacts like the closure of non-essential shops have a direct impact on the Pole's online shopping behaviours.

Almost half the Poles (47%) declare they are using online shopping more than before the beginning of the crisis, especially youngsters (18-29 y.o), parents and those living in medium size cities (20-50k inhabitants).

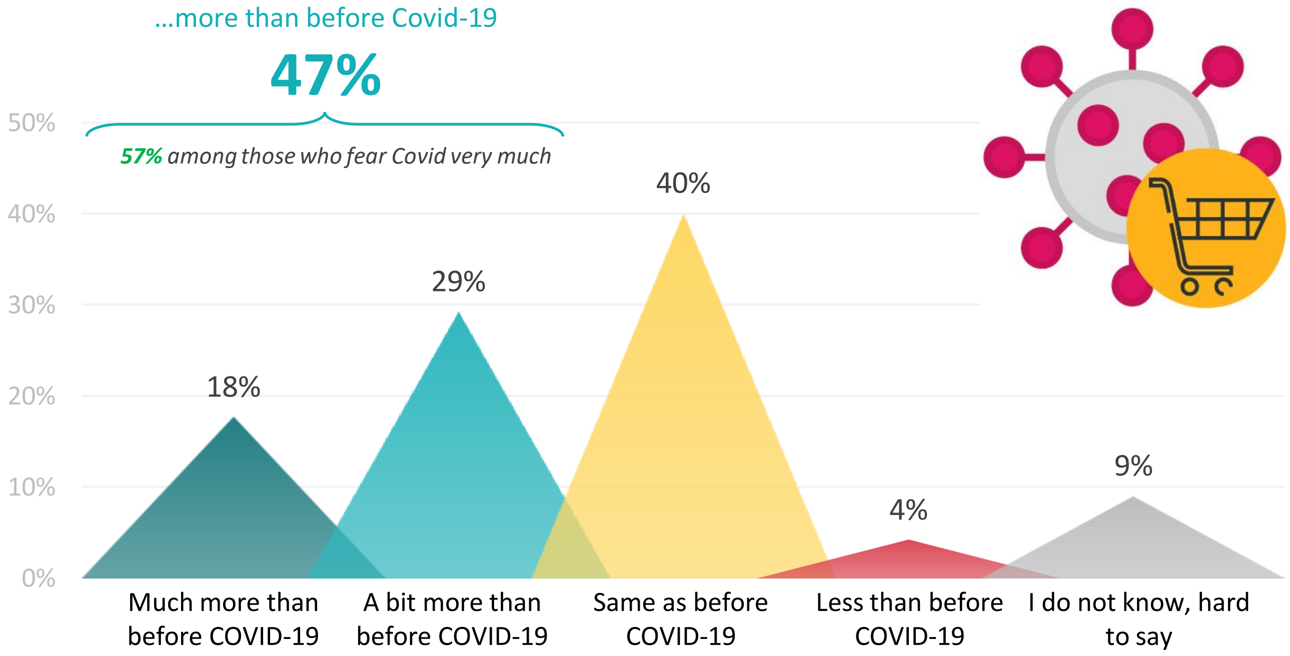
Beyond the strict measures imposed by the authorities, the **fear of the infection plays a role in the shopping behaviours**: a high level of fear nowadays (7.5/10, +0,8 points since June 2020) and 41% qualifying their fear with a mark 9 or 10 out of 10. This proportion reaches 50% of those who shop online more than before the crisis.

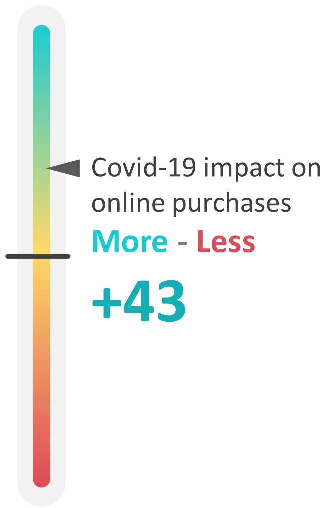
Poles do admit that the crisis had a positive impact on online purchase with almost half of them declaring they are purchasing online more than before the sanitary crisis

Q: In general, would you say that comparing to the time before COVID-19 pandemic, i.e. before early March this year, you purchase online

Base : Everyone (1174 respondents)

They purchase online…





eCommerce shift in Poland in a few words

Beyond the acceleration of Online purchases, a strong attachment of Poles with this purchasing channel :

- 97% of online purchasers have bought something online within the last 3 months, and they purchased 7 different categories on average.
- TOP5 categories: **clothes, cosmetics, cultural product (books, movies, disks), beauty products and electronics**. FMCG categories benefit more of the situation, continuing to grow their eShoppers penetration since February.
- **23% Poles declare would be very much affected if it was not possible to shop online anymore**, 82% would be affected at least a little.
- One third of Poles could be categorised as „apostles" to online shopping. They show a very strong relationship with eCommerce (would miss it a lot if it was not available anymore) and at the same time they use it much more often since the beginning of COVID crisis.

  This high attachment towards online shopping manifests in all circumstances with 46% of Poles who already shopped online while being in bed ☺
- In addition, **three-quarters of Poles buying online** have encountered a situation where **someone from their relatives pressured them to add a product to the basket** while shopping.

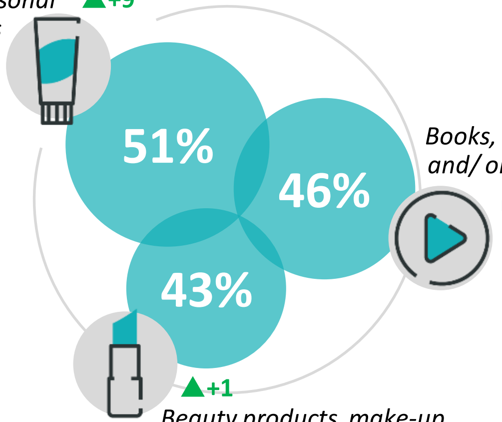
Poland is already a quite mature eCommerce market, with high penetration of online shopping. Leading categories: clothes, cosmetics and cultural product.

Q: Which of these products have you bought online in the last 4 weeks? / P2b. Which of these products have you bought online in the last 3 months?

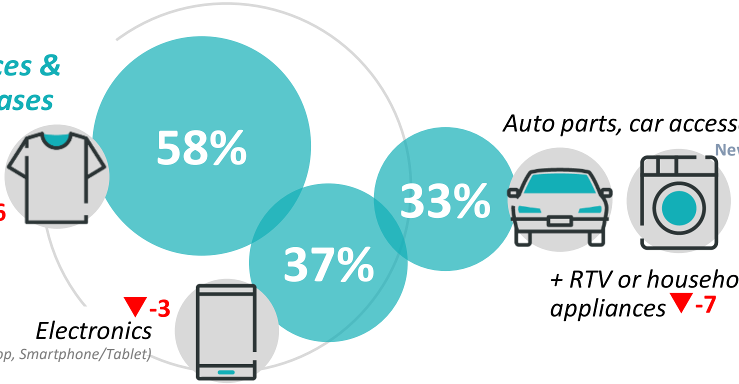
Base : Have already purchased online (1103 respondents)

- **97%** ***of Poles who already purchased online have bought something online in the last 3 months***
- **6.9** ***categories purchased on average*** ▲+2 categories
- **69%** ***have purchased more than 4 categories***

TOP3 Categories for FMCG Purchases – Last month



TOP3 Categories for Services & Consumer Durables Purchases – Last 3 months



▲+x / ▼-x : *evolutions vs OpinionWay's research carried out in February 2020, prior to Covid-19 crisis*

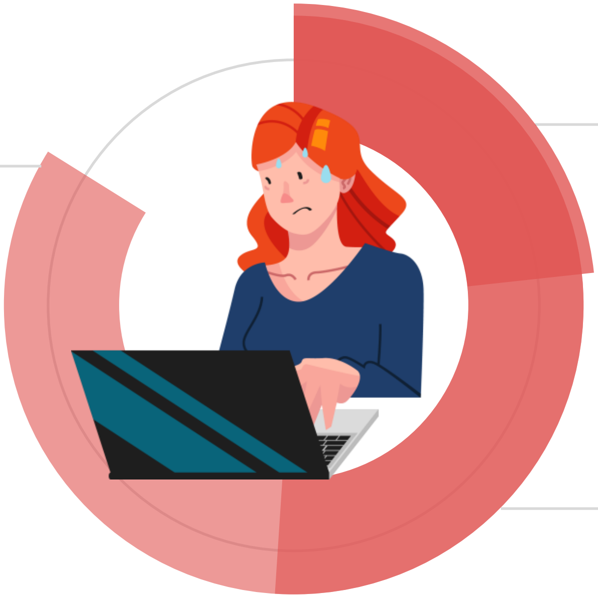
23 categories were tested overall. Details on demand

Online shopping: an essential purchasing channel according to the strong attachment manifested by Poles towards it.

Q: Imagine it is not anymore possible to shop online, how much would it affect you?

Base : Everyone (1174 respondents)

overall
82%
would be at least a little affected

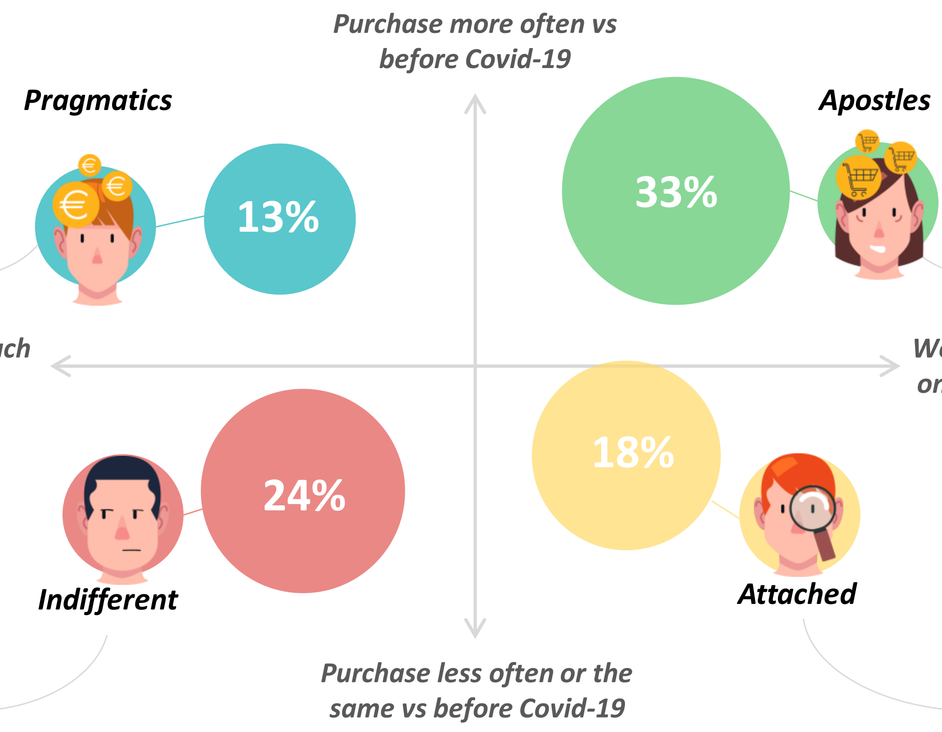


23%
Declare they would be very much affected if it was not possible to shop online anymore

28%
would be quite a lot affected

One out of three Polish eCommerce shoppers are „Apostles" to online shopping – they buy more that before COVID-19 and would miss online shopping a lot.

eCommerce shoppers typology - Q: In general, would you say that comparing to the time before COVID-19 pandemic, i.e. before early March this year, you purchase online x Q: Imagine it is not anymore possible to shop online, how much would it affect you?



Pragmatics

- 297 PLN spent during last purchase vs 250 PLN overall
- 3.9 barriers mentioned vs 3.2
- Average Fear of Covid-19: 8.0 vs 7.5

Apostles

- 44 y.o vs 44,9 overall
- Cities 20-50 000 inhab.: 16% vs 11%
- Have children: 49% vs 42%
- 9.1 categories purchased vs 6.9
- Avg Satisfaction: 8.9 vs 8.7
- 3.9 barriers mentioned vs 3.2
- Average Fear of Covid-19: 8.1 vs 7.5

Indifferent

- 49.1 y.o vs 44,9 overall
- Essential Vocational: 14% vs 10%
- No children: 68% vs 58%
- 4.7 categories purchased vs 6.9
- 201 PLN spent during last purchase vs 250 PLN overall
- Avg Satisfaction: 8.4 vs 8.7
- Average Fear of Covid-19: 6.9 vs 7.5

Attached

- Men: 58% vs 49% overall
- Higher education: 48% vs 41%
- Average Fear of Covid-19: 7.2 vs 7.5

Poles’ high attachment towards online shopping manifests in all circumstances!

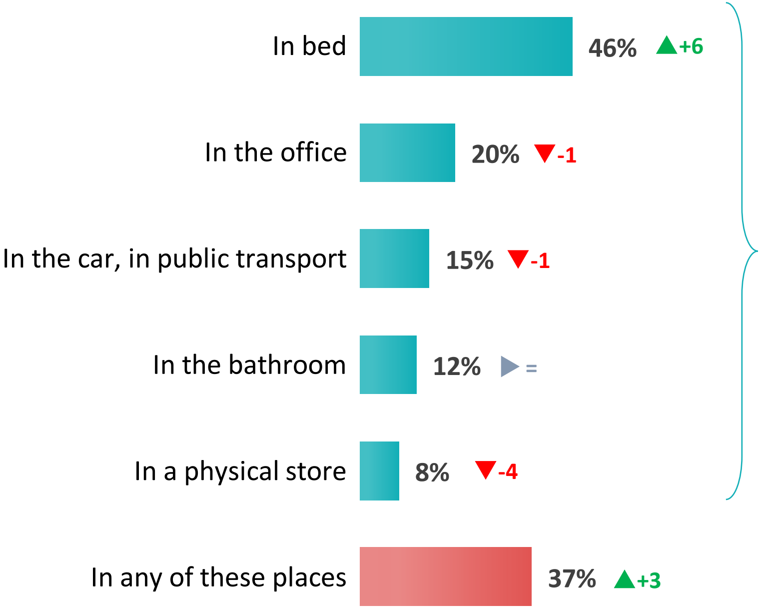
Q: Do you sometimes shop online while...

Base : Everyone (1174 respondents)

#1 *Atypic shopping situation*

46%

Of Poles are shopping online while being in bed



63%

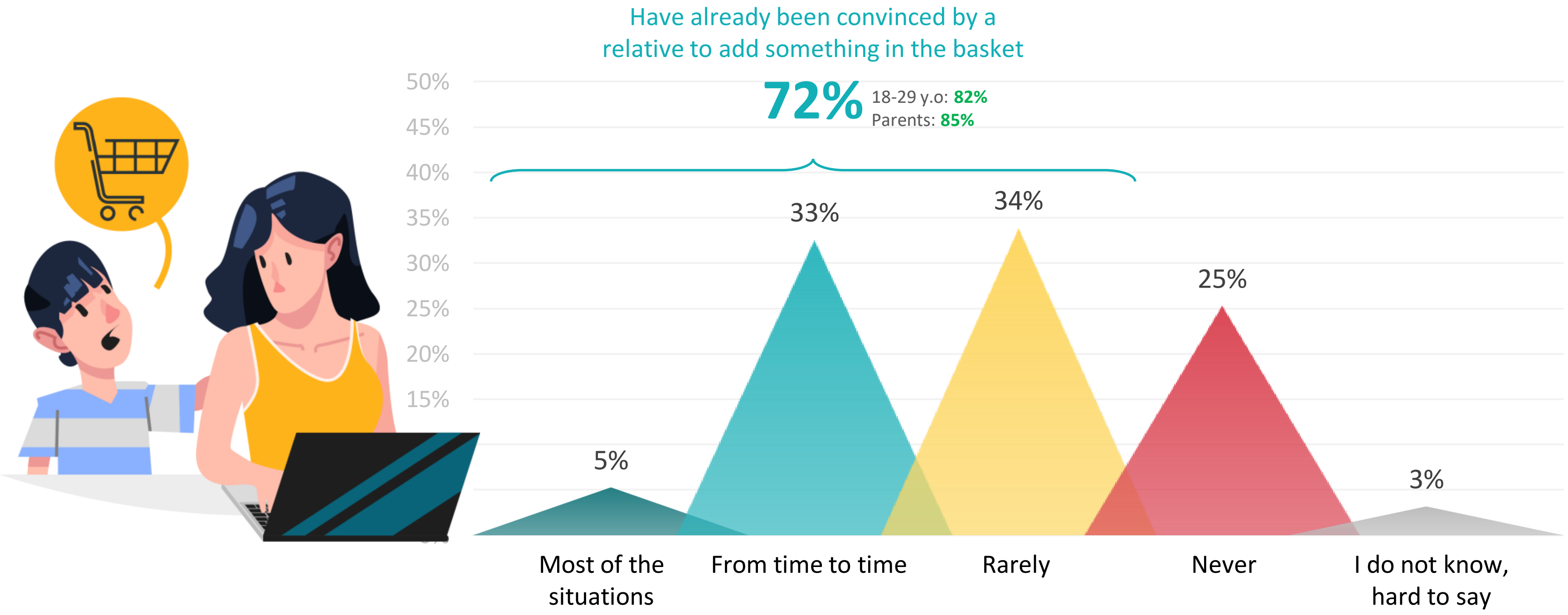
Of Poles are shopping online in at least one of those situations

▲+x / ▼-x *: evolutions vs OpinionWay’s research carried out in February 2020, prior to Covid-19 crisis*

Impulsive purchases due to demands of relatives to add something in the basket are a reality for three out of four Poles – at least rarely –

Q: When you purchase online, how often someone close (partner, children, friend, etc.) convince you to add some product to the basket even if you did not initially plan to purchase it?

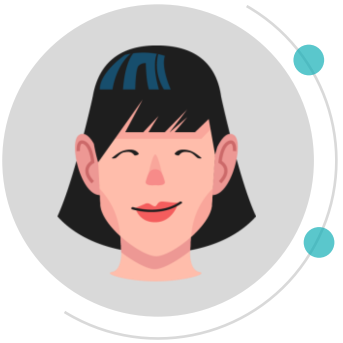
Base : Have already purchased online (1103 respondents)



High levels of satisfaction whatever the category, Cultural products is the nr1 category, followed by beauty products and auto parts/accessories

Q: Thinking of the last purchase of […] you did online, how would you rate your overall satisfaction with this experience (platform, ordering process, price, delivery…)? Please use scale from 0 to 10.

Base : Have purchased the category



8.7/10 ***is the average satisfaction of the last purchase online, whatever the category***

TOP5 ***categories in terms of satisfaction:***

#1	*Books, movies and/ or music*	9.0/10
#2	*Beauty products, make-up*	8.9/10
#3	*Auto parts, car accessories*	8.9/10
#4	*Chemistry and cleaning products*	8.8/10
#5	*Food and animal products*	8.8/10

eCommerce shift in Poland in a few words

250 zł is the **average basket value** for Poles' online shopping. It is 96.4 zł for FMCG categories and reaches 436.3 zł for durable goods and services.
The **TOP3 baskets in terms of spending**: RTV and household appliances, Electronics and Bank and insurance products.

Whatever the category, **online purchasing generates high levels of satisfaction**, especially for cultural products, beauty products and auto parts, accessories. Fresh food and bank and insurance products are closing the list with satisfaction rates below 8/10.

There are no correlation between the amount spent and the satisfaction generated. For example **RTV or household appliances as well as Bank, insurance and Sport, recreational products slightly underperforms in terms of satisfaction in relation to budget spent.**

On the other hand, the **satisfaction depends strongly on the barriers one meets while shopping online**. The main barriers are inherent to the nature of the channel itself: **having to pay for shipping and no possibility to try out the product** prior to the purchase. Offers facilitating the return of products and free shipment are good answers to address those barriers. The experience of users shopping online should lower the amount of barriers, but we notice that the more one shop online and the more barriers one raises.

The average value of the shopping basket for FMCG purchases is below 100 PLN, and alcohol, children's products and fresh food are the three leading categories in terms of the average basket value

Q: How much did you spent last time when buying […] online?

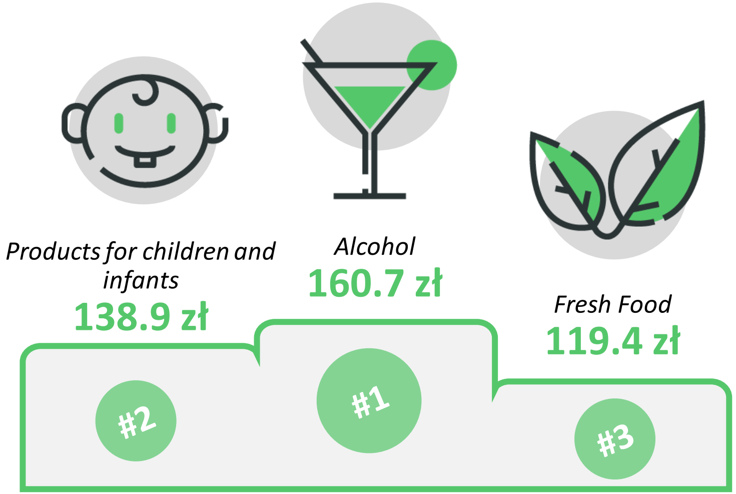
Base : Have purchased the category

FMCG Purchases

Last purchase

96.4 zł *spent on average during the last online purchase*

TOP3 *categories in terms of amount spent:*



On the other hand, the average value of the basket for services and durable goods is over 400 PLN. The baskets of the highest value are recorded in the categories of electronics and household appliances, as well as electronics, banking products and insurances.

Q: How much did you spent last time when buying [...] online?

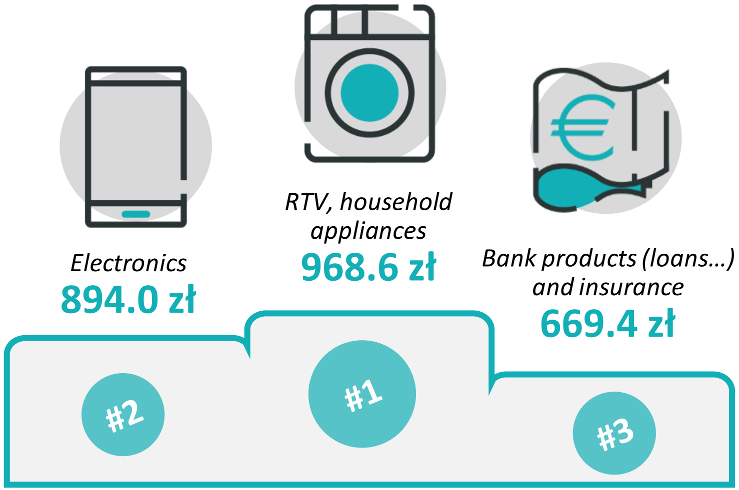
Base : Have purchased the category

Services and durable purchases

Last purchase

436.3 zł ***spent on average during the last online purchase***

TOP3 ***categories in terms of amount spent:***



The top pain points of eCommerce are related to its immanent features (paying for shipping and impossible to try the product before) and issues related to the delivery.

Q: Which of the following things are most annoying for you in online shopping?

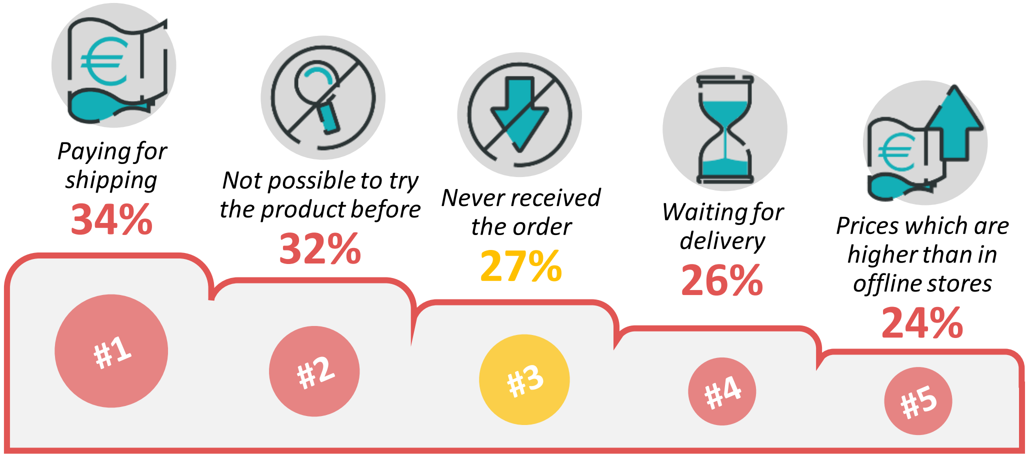
Base : Everyone (1174 respondents) / Multiple answers

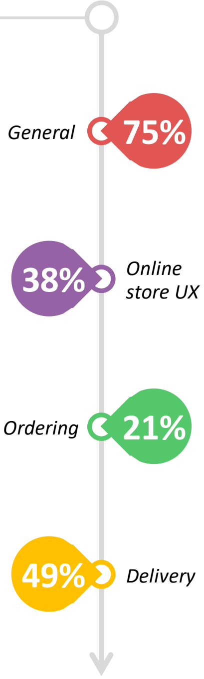
TOP5 Barriers while shopping online

3.2

barriers mentioned on average /18

Overall, 18 barriers identified, belonging to 4 main topics :





eCommerce shift in Poland in a few words

The growth of online shopping in Poland is comforted by the current restrictions, and **84% of Poles intend to purchase online before the end of the year**, 96% among those who shop online more than before the crisis, and 97% of the consumers categorised as “apostles”.
10 categories are considered on average: **Clothes and Fashion** in the 1st place, followed by **cosmetics and beauty products.**

What about online shopping for Christmas?
76% of those who plan an online purchase before the end of the year will do it for a **Christmas gift.** 3 categories are considered on average by the intenders and the TOP3 categories considered are **Cultural products, beauty products and Clothing and fashion products.**

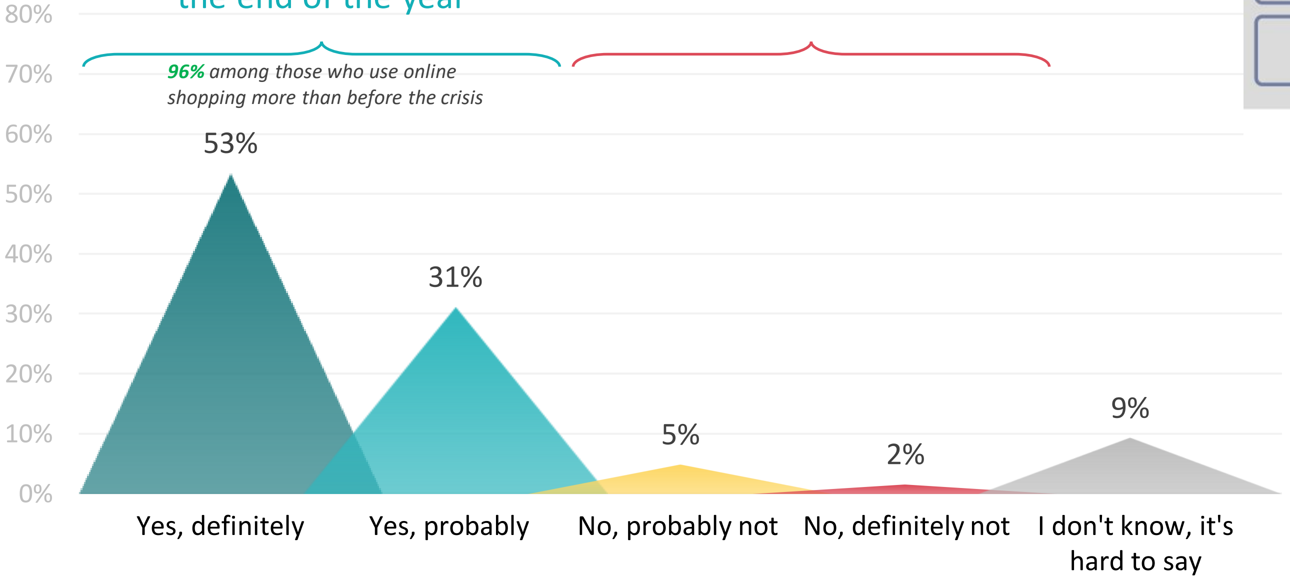
More than 8 Poles out of 10 intend to shop online in 2020!

Q: Do you think that in the next 3 months (until the end of year 2020) you will be shopping online?

Base : Everyone (1174 respondents)

84%
Will be shopping online before the end of the year

7%
Won't



Polish online shopping intenders will focus on FMCG categories, with Clothes and Fashion in the 1st place, followed by cosmetics and beauty products.

Q: Among the following type of products what do you plan to buy in the next 2 months (by the end of year 2020)…?

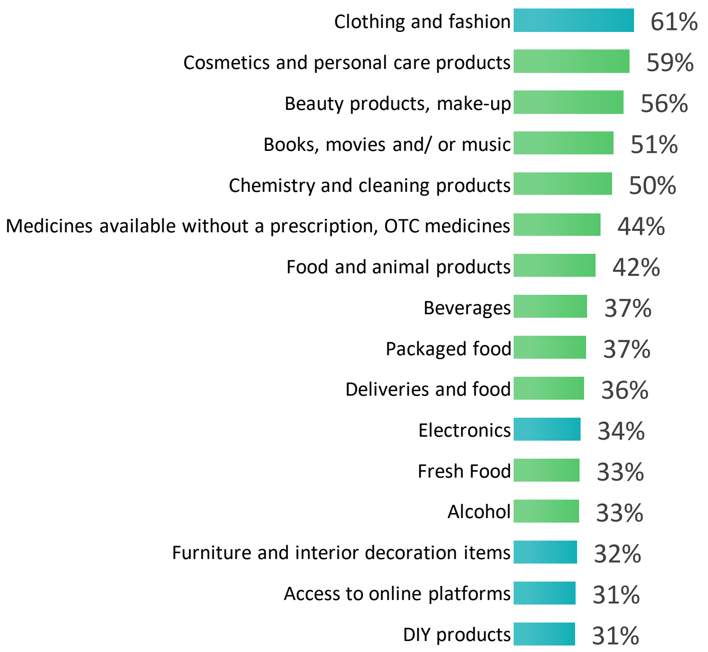
Base : Everyone (1174 respondents) / Multiple answers

***83%** of all Poles consider online shopping before the end of the year*

***8,5** categories considered on average*

***53%** consider 7 categories and more*

Purchase intent – TOP15 categories



Detailed categories on demand

Fashion and clothes and beauty products will also have a important role in Xmas online shopping baskets, however the most of eCommerce shopping intenders will choose to purchase books, movies or music online.

Q: Among the following type of products what do you plan to buy in the next 2 months (by the end of year 2020)…?

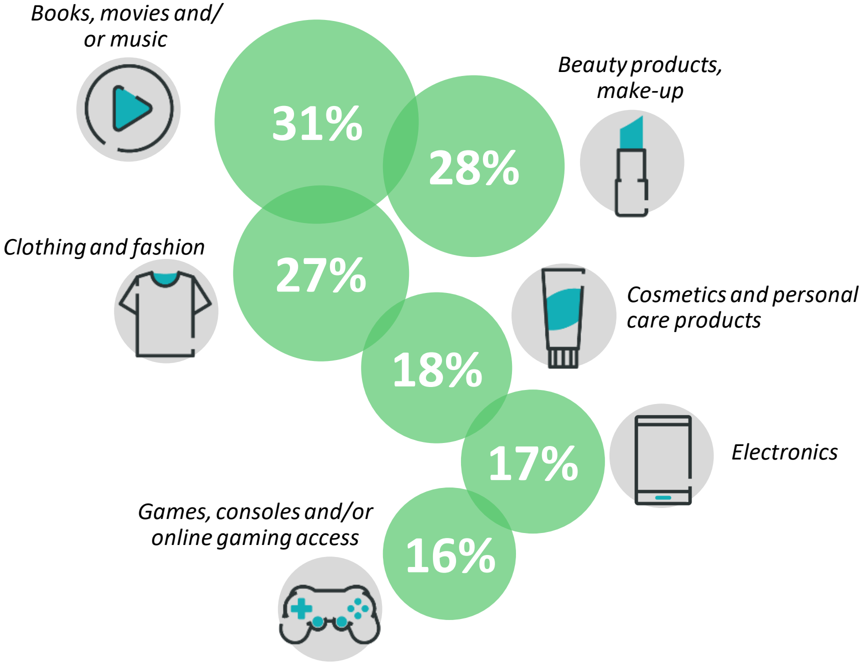
Base : Everyone (1174 respondents) / Multiple answers

In total 64% of Poles intend to purchase Xmas presents online

2.5 categories considered on average

27% consider 4 or more categories

TOP6 Categories considered for Xmas presents



METHODOLOGY

Metodology

Quantitative research carried out on **1174 Poles** aged 18 years old and more.
The sample is representative of the national population in terms of gender, age, level of education and region of residence.

Online questionnaire on **CAWI system** (Computer Assisted Web Interview)

The fieldwork was carried out between **October the 27th and 30th 2020**.

Please take into consideration an error margin of 1.5 up to 3 points for a 1,000 respondents sample.

Respondents' Profile

Gender	%
Man	49%
Woman	51%

Age	%
18-29 y.o	18%
30-39 y.o	20%
40-49 y.o	17%
50-59 y.o	15%
60 y.o and more	29%

Level of education	%
podst. lub gimnazjalne	8%
zasad. zawodowe	10%
średnie	41%
wyższe	41%

City size	%
Rural	32%
Cities below 20 000 inhabitants	13%
Cities 20-50 000 inhabitants	11%
Cities 50-100 000 inhabitants	10%
Cities 100-200 000 inhabitants	11%
Cities 200-500 000 inhabitants	11%
More than 500 000 inhabitants	12%

Region	%
dolnośląskie	8%
kujawsko-pomorskie	5%
lubelskie	6%
lubuskie	3%
łódzkie	6%
małopolskie	9%
mazowieckie	14%
opolskie	3%
podkarpackie	6%
podlaskie	3%
pomorskie	6%
śląskie	12%
świętokrzyskie	3%
warmińsko-mazurskie	4%
wielkopolskie	9%
zachodniopomorskie	5%

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