

Delivery Matters

Understanding the needs of online shoppers in France in 2015



France edition

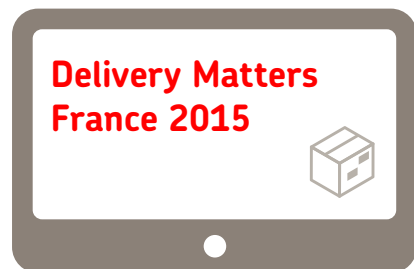


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Delivery matters in France

Welcome to our first International Delivery Matters – France report.

We've been producing research like this in the UK for the past seven years, helping retailers like you understand consumers' habits and preferences when they shop online. We're now widening our scope, with five new international reports focusing on China, Australia, the USA, France and Germany.

You can download copies of all our reports at: royalmail.com/deliverymatters

So does delivery matter in France?

Absolutely. As part of the European Union, France is easy to trade with and is a recognised and established export lane, with international export platforms making it of strategic and tactical importance in the international marketplace. More than half of French shoppers say they buy online more than they used to, this coupled with delivery speeds of often quicker than 3-5 days, makes delivering to France a potential growth market.

A large proportion of shoppers in France have bought British goods recently, with clothes and footwear topping the list. Many of those shoppers say it's because they know they'll be buying high quality.

At Royal Mail we're here to make it easier for you to get started as an exporter. We believe 'international' is just another postcode and can help businesses like yours offer an excellent delivery service, building trust with your customers while keeping costs under control. This research is a great place to start. We hope it helps you understand the needs of French online shoppers and gives you more confidence in accessing this important, and growing market.

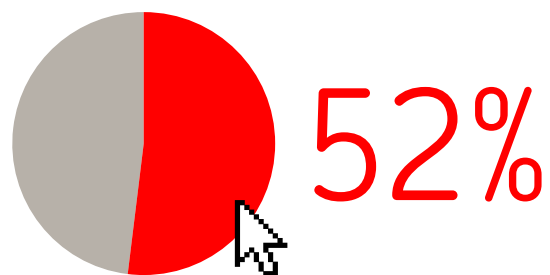
Nick Landon Managing Director of Royal Mail Parcels

Our research was independently conducted by Hall & Partners in April 2015. To help us explore similarities and differences, we sometimes compare the results to UK research, also carried out by Hall & Partners in April 2015.

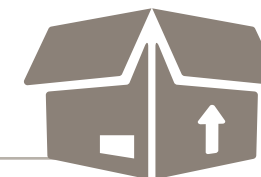
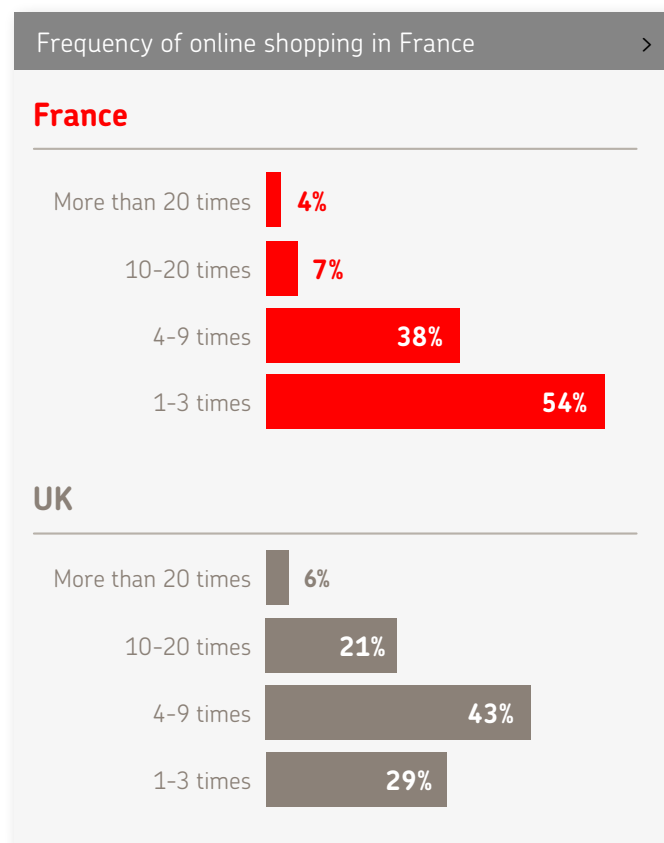
The trends



Shopping online is growing in France. 52% of France's online shoppers say they're shopping more frequently now than they used to.

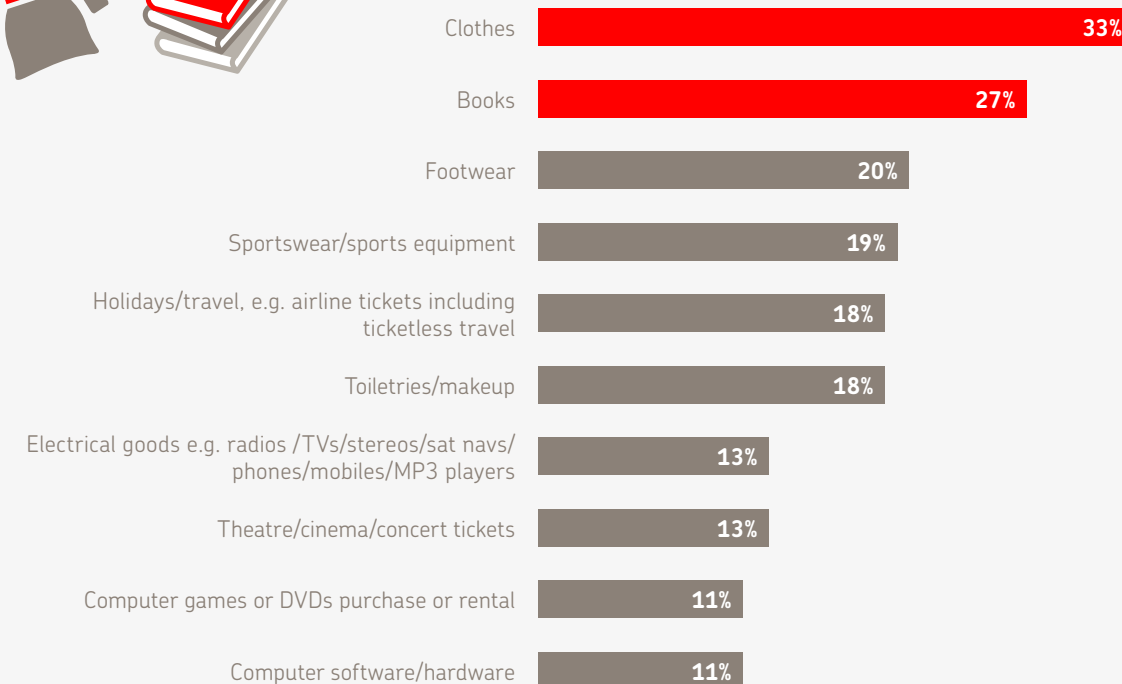


They still shop less frequently than in the UK: the majority says they shop online between 1-3 times, while the majority of UK shoppers shop between 4 and 20 times. That means the average spend is less than in the UK too. In France, shoppers spend an average of £207 over three months, while in the UK they spend £287.



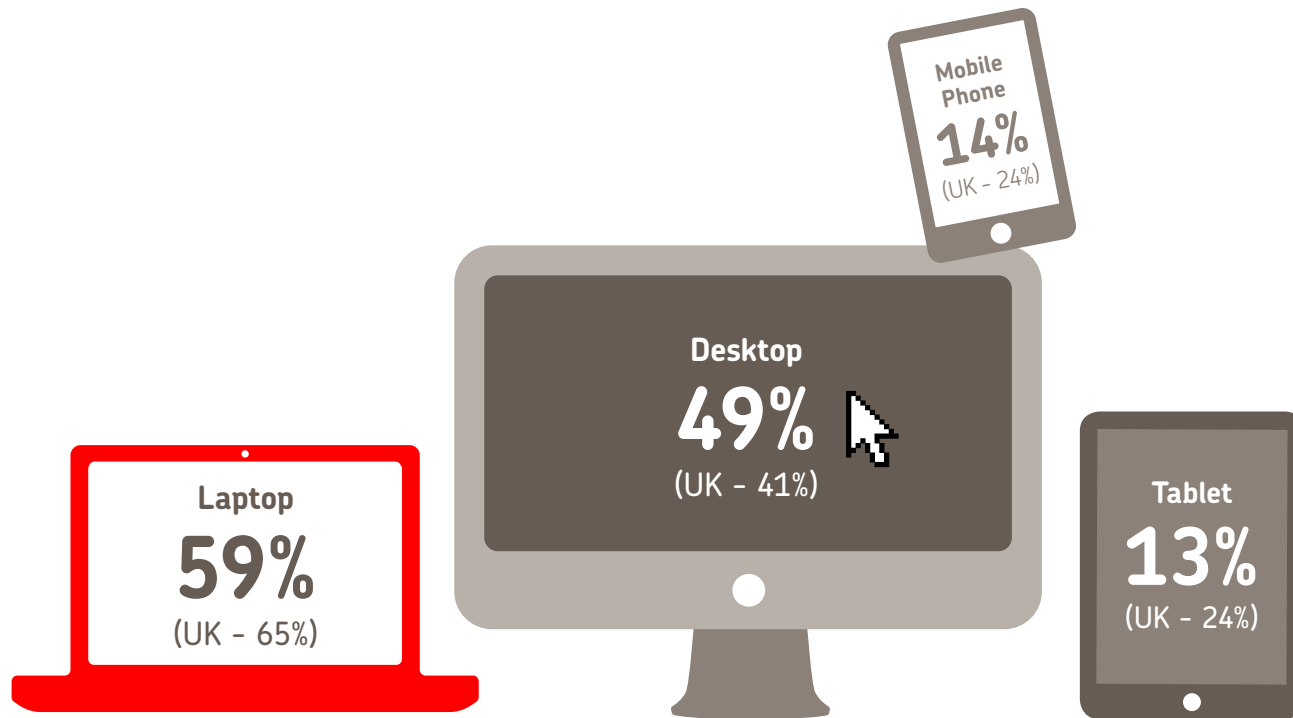
Just like in the UK, clothes, books and footwear top the list for online purchases. But they're much keener than UK shoppers on buying sportswear and sports equipment.

Products bought online in the last 3 months



How do shoppers shop in France, and with which devices?

Laptops and desktops are still the favourite devices for online shopping. French shoppers have been slower to adopt mobile shopping than in the UK.



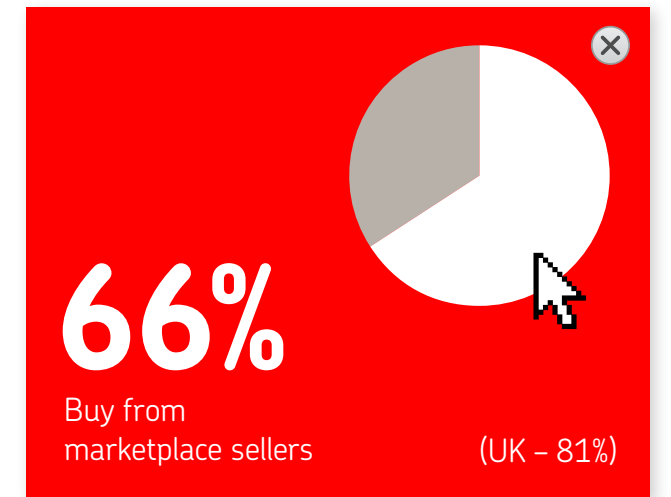
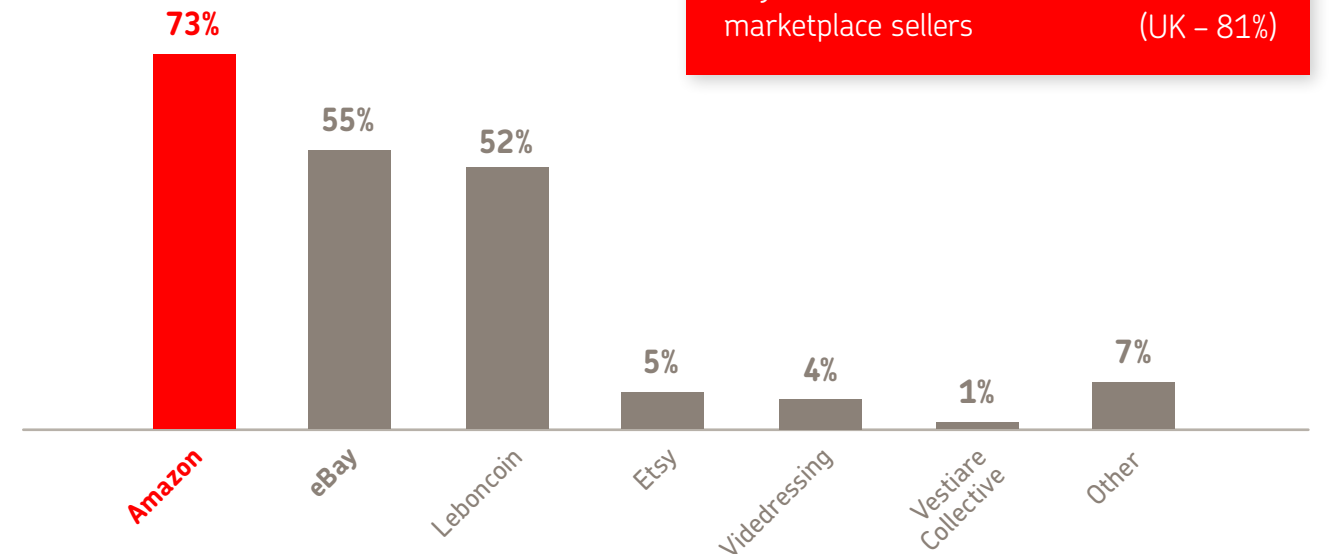
Marketplaces are influential in France



Online marketplaces are big in France. They're used less frequently than in the UK but 66% of shoppers use them. Product and seller ratings really matter; they have a big influence on purchasing decisions.

Amazon and eBay are the most popular, with French marketplace Leboncoin.fr close behind.

Marketplace Used



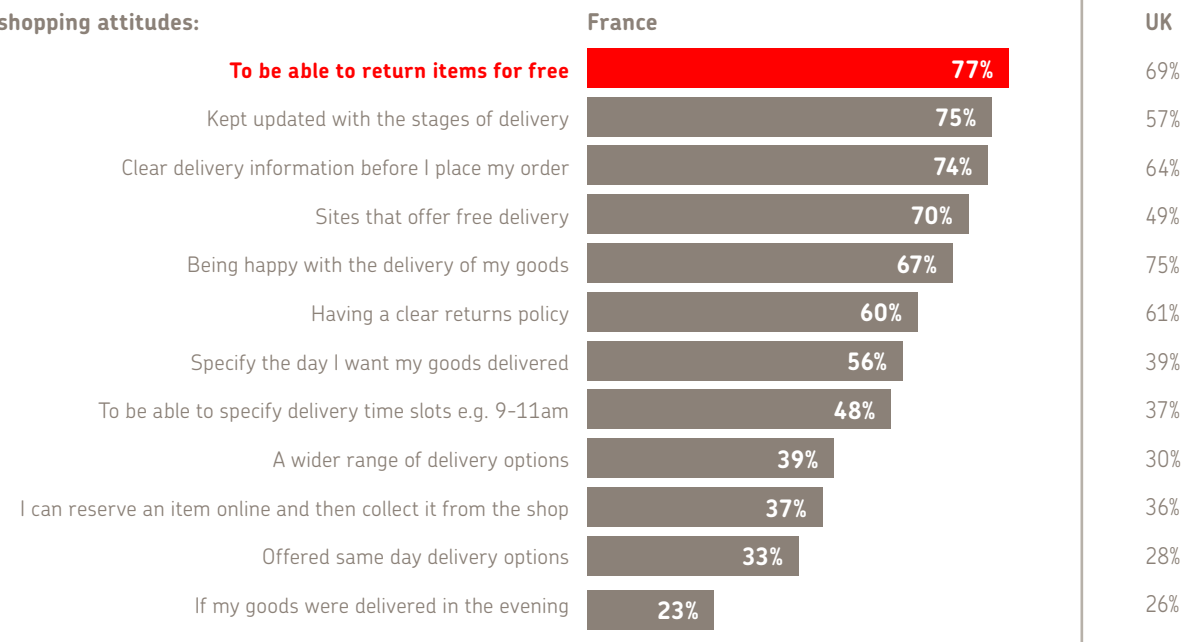
Attitudes towards delivery



Free returns are the main influencer for 77% of online shoppers in France. Also they like to be kept up-to-date on all stages of their delivery, as well as seeing clear delivery information before they place their order.

There's also a much higher demand for tracking than in the UK. This suggests that shoppers are more cautious and have less confidence in online shopping.

Online shopping attitudes:

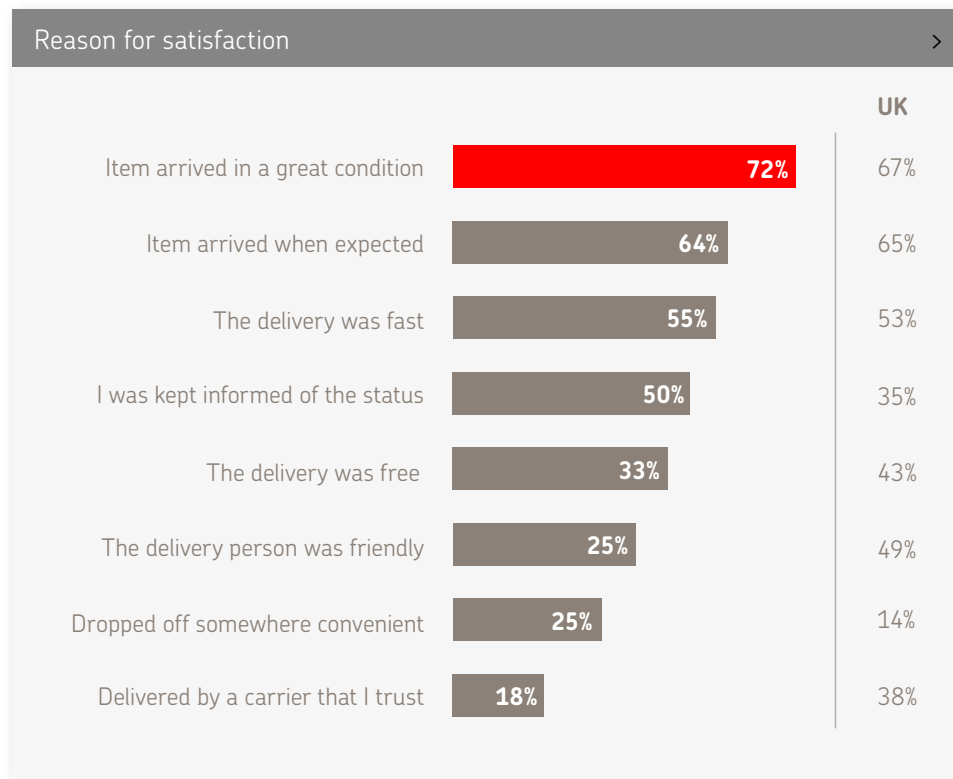


Figures for agree strongly/agree completely

Delivery satisfaction



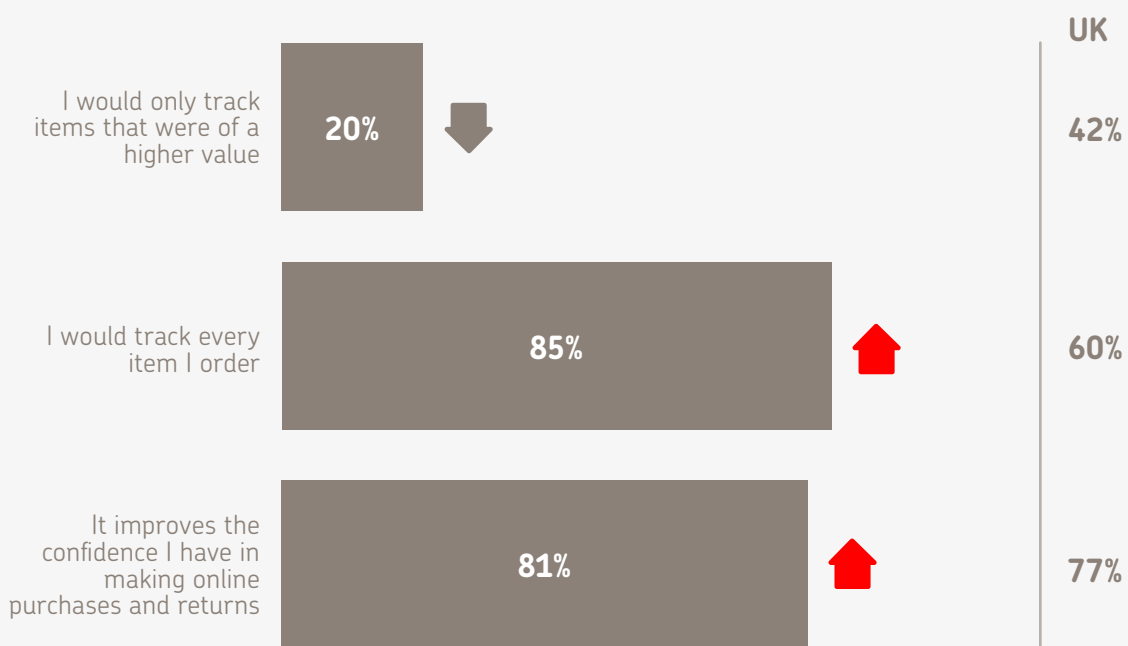
Customer satisfaction in both France and the UK depends mainly on whether the item was delivered quickly, on time and in good condition. In France, it also depends on whether they were kept up-to-date on the progress of their delivery.



Tracking matters



Tracking is extremely important to shoppers in France, much more so than in the UK. It's not just about high-value items. A huge 85% say they would track every order. This gives them reassurance and makes them feel more confident about shopping online.



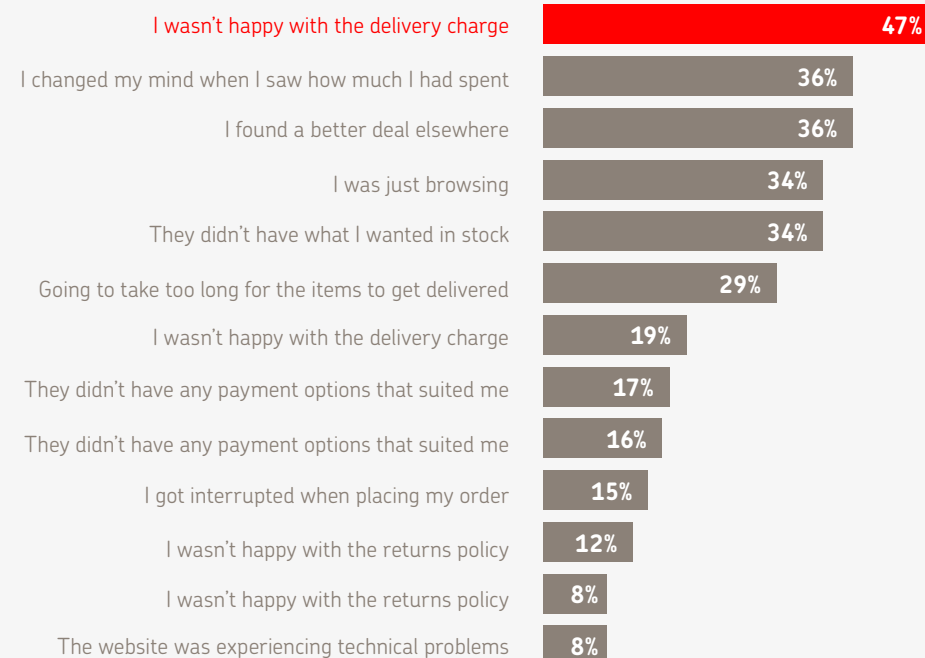
Significantly lower/higher than the UK
 Agree strongly / completely

Cart abandonment



Cart abandonment is a slightly bigger problem in France than in the UK, with 24% of shoppers abandoning their online basket compared with 21% in the UK. Either they're more likely to be shopping around for the best deal, or they tend to be put off by delivery charges.

Reason for abandoning shopping basket



Preference for home delivery



Most shoppers in France prefer their goods delivered to their home – but they like to have other options too. 20% would prefer delivery to a local convenience store, or a corner shop, which is much higher than in the UK, showing shoppers in France like to be offered convenient delivery options.



66%

of online shoppers would prefer to have items delivered to their home

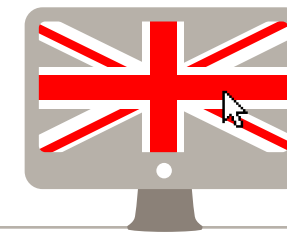


20%

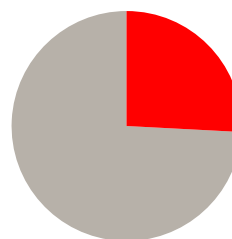
Convenience store / Corner shop

In the UK: 71%: Home Delivery

France ♥ UK



France's online shoppers like to buy British, with more than a quarter saying they've recently bought something from a UK website.

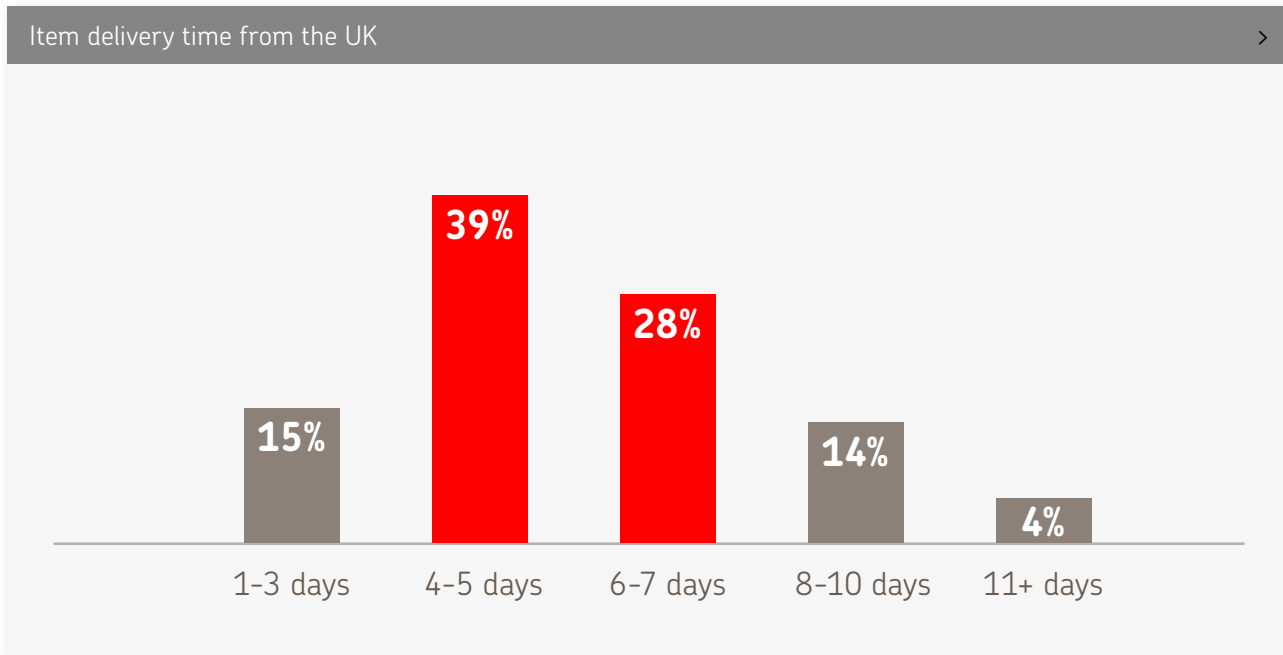
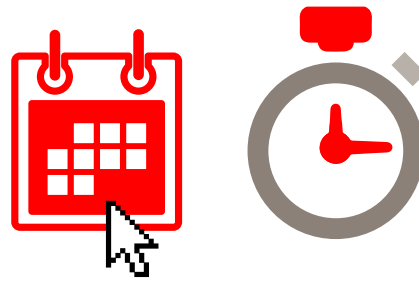


26% Of online shoppers in France have recently purchased items from a UK website

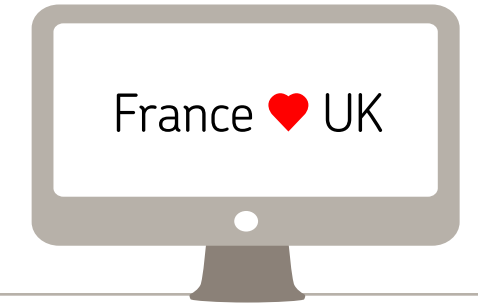
By far the most popular item is clothing, which accounts for 25% of the products bought from a UK website. This is followed by footwear and then computer games and DVDs.

Expectations of delivery timeframes

When it comes to international delivery shoppers in France don't expect their items to be delivered so quickly. Most of them expect to receive their orders from the UK within 4-7 days.

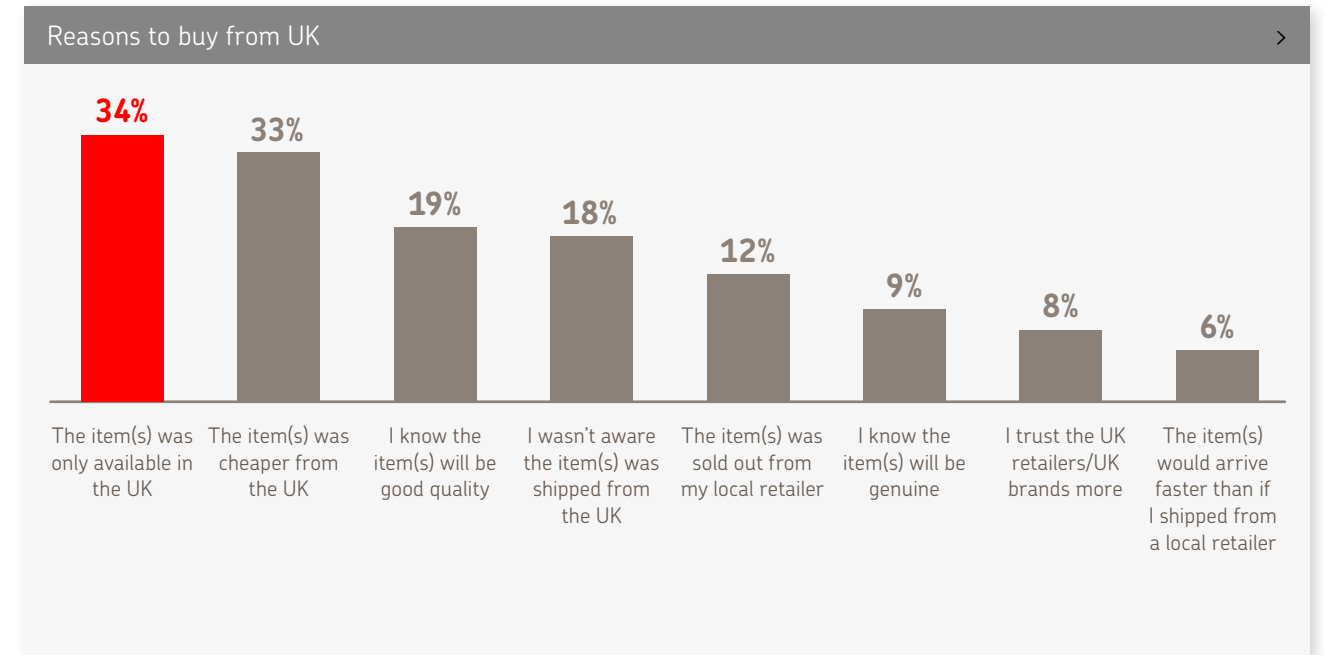


Why buy UK?



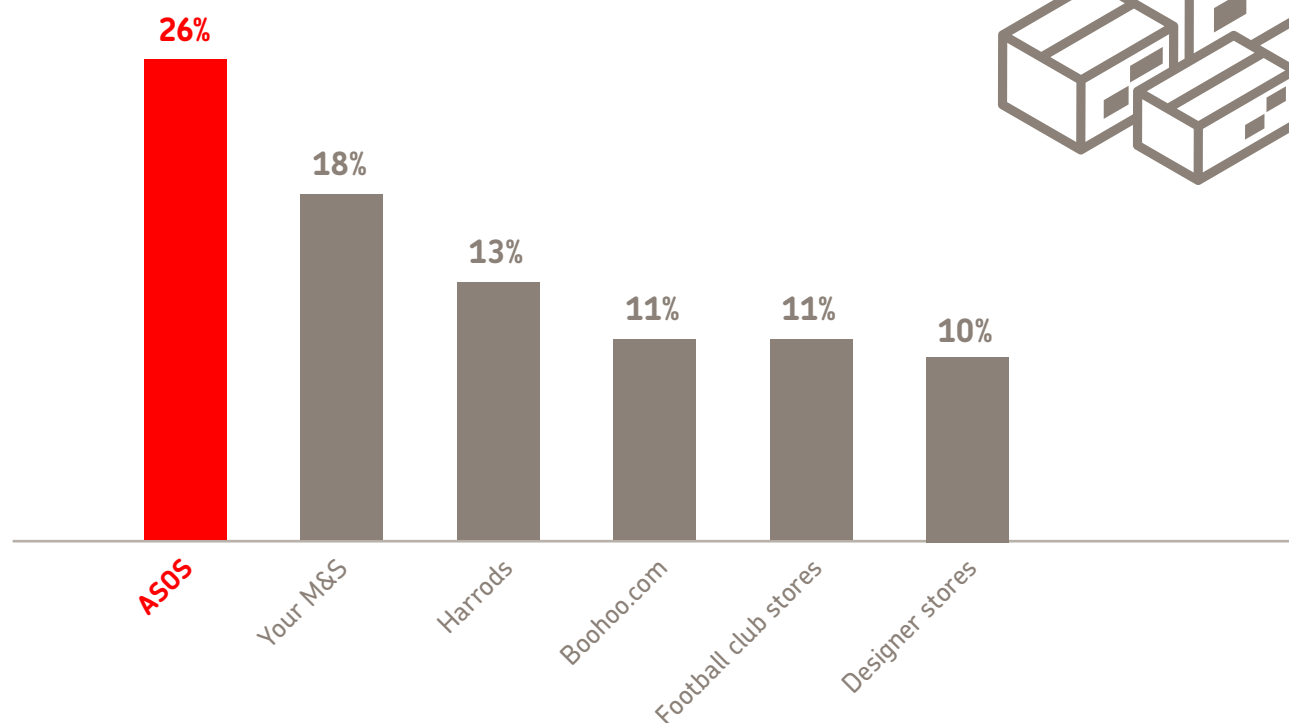
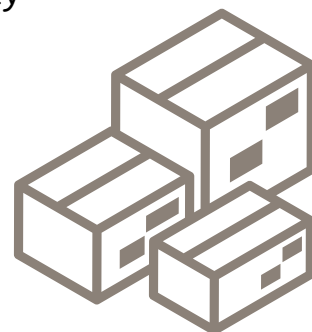
Most shoppers buy from a UK website because they can't find what they want elsewhere or because it's cheaper in the UK.

It's also because they trust British brands. One in five say they choose to buy from a UK website because they know it will be good quality.



Where do they shop?

ASOS is in the number one spot and the quintessentially British brands M&S and Harrods are also popular.

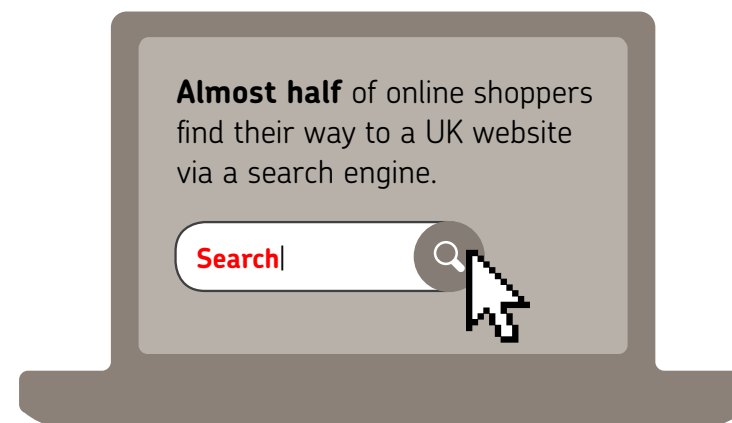
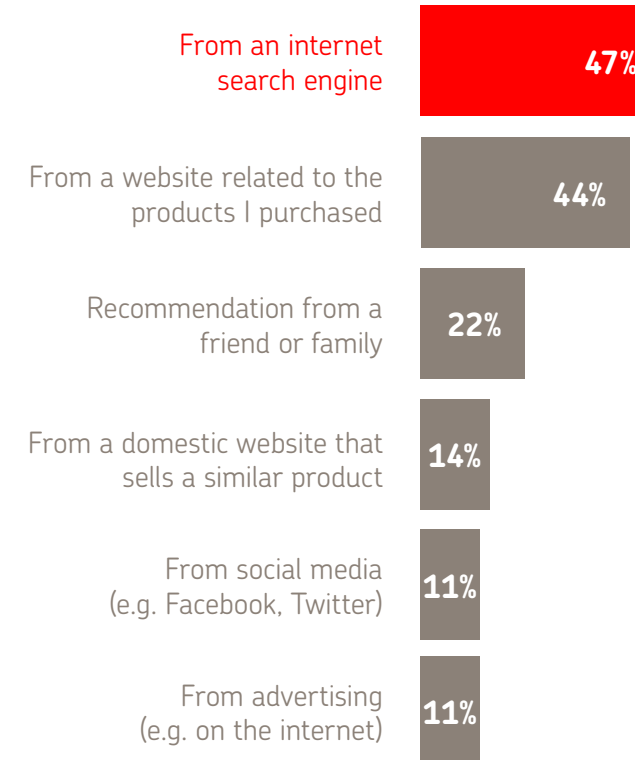


Q. Which of the following UK based websites do you typically purchase products from?

Search engines are the top way to look for UK items online

Word of mouth is important. One in five went to a UK website because it's been recommended to them. However many didn't realise until checkout that they were buying from the UK.

Discovering UK websites



What stops them?

For most shoppers in France, cost is the biggest barrier to shopping from the UK. Many think delivery charges are too high and that they will have to pay customs fees.

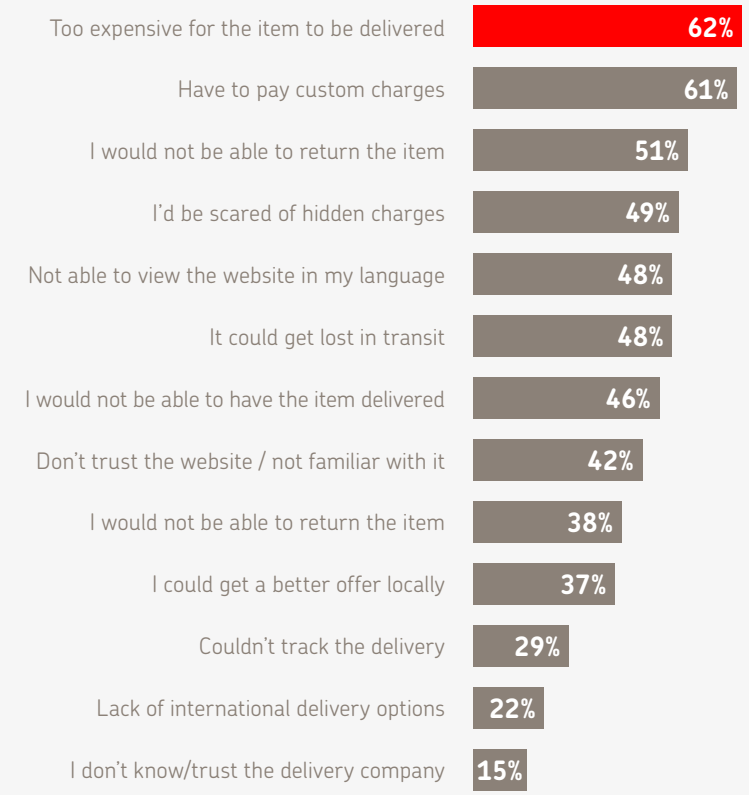
Then there's the language issue. Almost half of shoppers said they're put off if they can't view the website in their own language.

Risks of purchasing from a UK website >

46%

do consider it to be a risk to purchase goods online from the UK

Barriers to purchasing from the UK: ✕

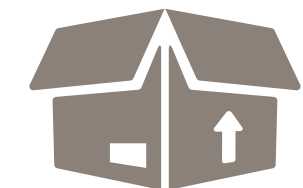


Reasons for shopping more from the UK

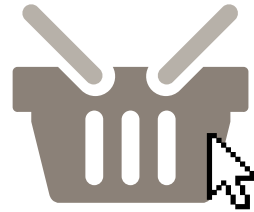
So there are three ways to break down the barriers: free or more affordable international delivery charges, websites translated into their own language, and the option to pay in euros.



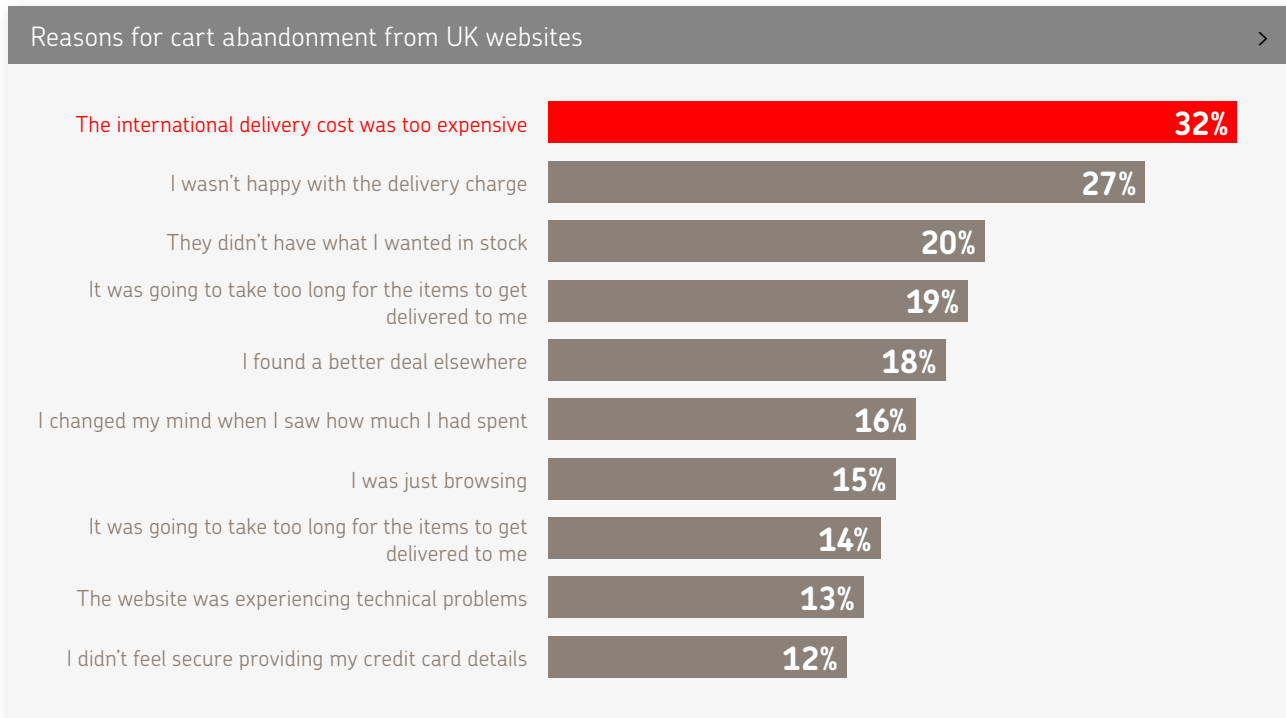
Q. Which of the following would make you more likely to shop online from a UK website?



Cart abandonment when shopping from UK websites



Purchases from the UK appear to be more considered with less browsing and shopping around, so there's less chance of cart abandonment. If shoppers do abandon their basket, it's usually because of international delivery costs.

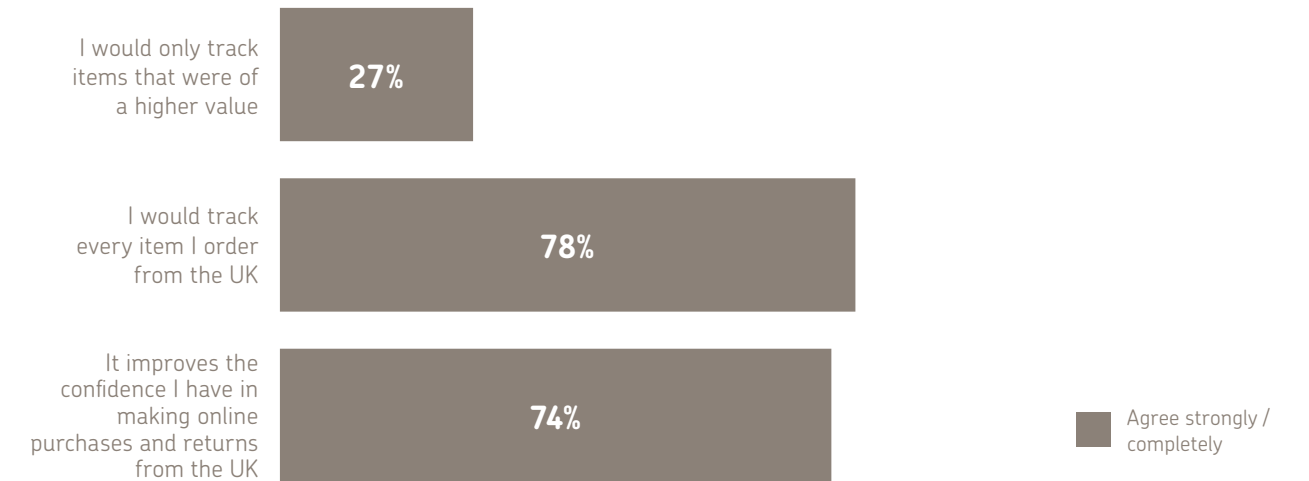


The importance of tracking when shopping from the UK



As we have seen, tracking is important to online shoppers in France, and this goes for deliveries from the UK too. Most expect tracking on every order from the UK, not just high-value items.

Tracking deliveries from the UK:



When choosing a delivery company, familiarity makes all the difference. Our delivery partner **La Poste** is the most trusted national delivery carrier in France for online shoppers.



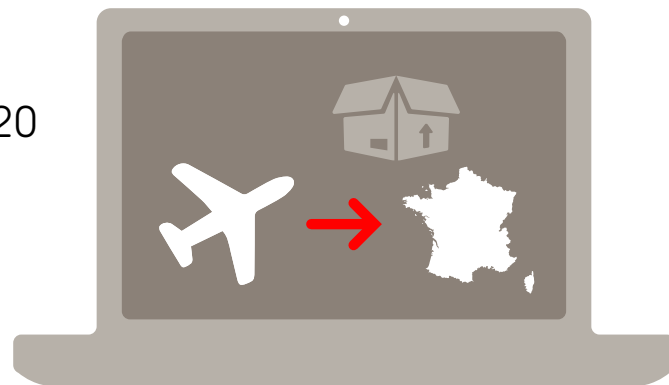
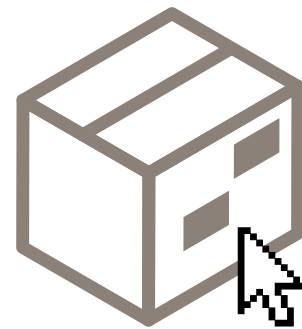
We help you deliver to France

Thanks for reading – we hope you found it useful. If you want to find out more about how we can help you deliver to France, contact your Royal Mail account manager or call us on **08457 950 950***.

To find out more about our research into online shopping in the UK, USA, Australia, France and Germany, visit royalmail.com/deliverymatters.

About this research

1,500 online shoppers who had bought items online in the last three months (other than groceries) completed a 15-20 minute online survey between 15 April and 29 April 2015.



Our products



We have a range of tracked and signed options, delivering to over 220 countries and territories worldwide. We deliver to Europe in 3-5 days and the rest of world in 5-7 days. We offer up to £50 inclusive compensation with extra cover up to £250 available.



We offer a range of delivery services to France, including International Tracked & Signed, International Business Parcels and International Business Parcel Returns. We work closely with La Poste, making sure we have the expert, local knowledge we need to deliver in France.



Making it easy to access France

You can now send 1,000 or more Tracked items across UK, International and Returns services and by combining volumes you can benefit from a better price.



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