

EXCLUSIVE STUDY ON CUSTOMER EXPECTATIONS

What customers in Europe expect from e-commerce providers – the latest developments





Table of contents

1. Introduction	P3
2. Not just a question of money	P6
2.1 Costs remain important	
2.2 The value we place on the environment	
2.3 Every country has its preferred payment method	
3. What customers want most: Delivery preferences	P14
4. Cross-border shipping: The boundaries of patience	P16
5. Back to the start: Returns management creates customer satisfaction	P17
6. Summary	P19
7. About us / Imprint	P22
8. Endnotes	P23

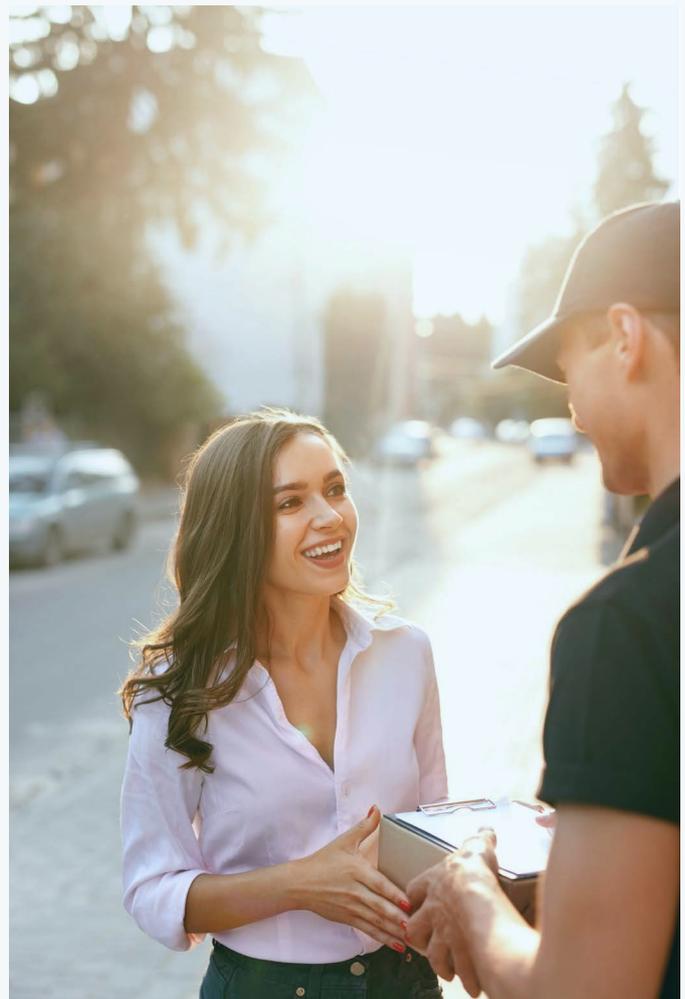
1. Introduction

Business worldwide is still far from “normal”: energy supply problems, a shortage of truck drivers, supply bottlenecks, and price increases are affecting the consumer climate. And following the significant easing of the pandemic situation, many consumers are evidently returning to brick-and-mortar retail.

There are various signs that, after a long phase of double-digit growth, the boom in online retail may be over for the time being – and that the e-commerce industry will need to dial back its expectations going forward. In **February 2022**, the Salesforce Shopping Index, for example, was already reporting a **5% dip in worldwide online retail sales**. In the **German shipping and online retail sector**, sales for January to May 2022 were **down by around 10.5%** in real terms compared with the previous year.¹

In the **Netherlands**, 2022 benchmarks show a **slump of up to 27% in sales**.² And the e-commerce industry in **France** reported a **12% drop** in product sales compared with the same period the previous year. It is worth noting, however, that these figures are still 15% higher than in the same period in 2020 and **20% above the pre-Covid level**.³ In 2022 German online retailers are reporting a solid 23% growth against 2019 figures.

In **Europe**, too, the trend, viewed over the long term, is upward: in 2021, revenue in cross-border online retail (excluding the travel segment) grew by 17% to EUR 171 billion. As such, it fared better than **online retail** as a whole, and according to the latest forecast by the industry platform Cross-Border Commerce Europe (CBCommerce.eu), growth is set to continue, **with sales expected to total 220 billion in 2022**.⁴



The **positive trend in the Austrian and Italian e-commerce markets** was a contributing factor. By the end of April 2022, the e-commerce figures for Austria were up 8% on the previous year, breaking through the EUR 10 billion mark for the first time.⁵ And in **Italy**, the e-commerce sector was up 14% on the previous year in the first quarter of 2022 and, according to a recent study, is on course for sales of over EUR 45 billion.⁶

The convenience for consumers supports the expectation that **online retail will certainly continue to grow over the medium term**. In a recent survey by the German association *Bundesverband E-Commerce und Versandhandel* (bevh), over two-thirds (68.2%) of respondents of all age groups felt that no longer being able to order online would impair their quality of life. In particular, the 40- to 49-year-old and the 60+ age groups could not imagine relinquishing online shopping.⁷

Despite all this optimism, however, one thing is clear: online retail needs to retain and develop its greatest strength – high flexibility and adaptability to changing customer needs – if it wants to remain on this successful course over the long term. Consumers not only expect providers to ensure the convenient supply of a wide range of goods but also to deliver a certain level of service – and respond to current challenges: climate change and a scarcity of resources influence our way of thinking. For example, the slow fashion trend is gaining traction, as is awareness of regional quality outside urban centers. Community-oriented platforms are influencing our buying behavior, and climate change and excess packaging are increasingly leaving online shoppers with a guilty conscience. This was highlighted back in June 2022 in the Seven Senders publication “Roadmap 2025: Sustainability in European e-commerce”.



This current study investigates in detail how European online shoppers' expectations of the perfect shopping experience have changed recently: in producing the study, the results of a survey carried out by Seven Senders in Germany, France, Italy, Spain, the Netherlands, Austria and Switzerland in 2021 have been compared with the responses to a survey of 3,500 online shoppers carried out in partnership with the market research institute Appinio in 2022.



INSIGHT

Each section summarizes the results of the Seven Senders study in brief “insights,” which provide useful tips on **improving** and strengthening customer retention and satisfaction in your target countries by creating an optimal **delivery experience**. After all, only by knowing the exact **requirements of your target group in terms of payment and delivery preferences** can you tailor your service accordingly and take account of individual European countries' specific priorities. This will give your business all-important competitive advantages and make you a valued provider for your target group – for robust growth and sustainable international success.

Once again, it was clear that there are significant differences between individual countries – and that the opinions of European consumers are in a state of flux. In this white paper, you will learn **how customer requirements have changed recently in the selected European countries, particularly with regard to delivery**, what expectations you will encounter in the different national markets – and the best way to ensure satisfied customers: for successful, long-term customer relationships and solid growth, even in today's challenging market environment.

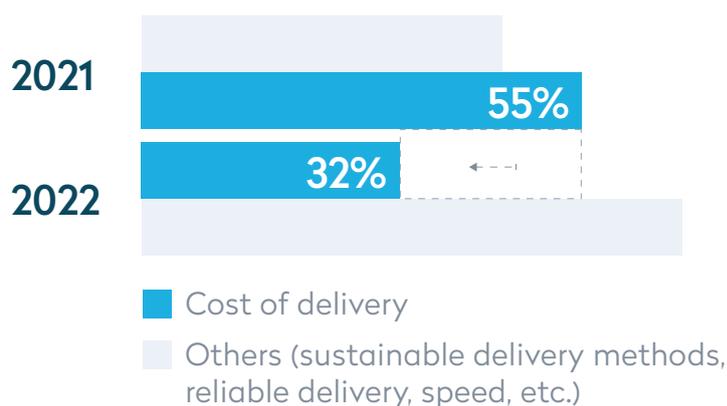


2. Not just a question of money

2.1 Costs remain important

European consumers still rate shipping costs as the most important factor when choosing one online store over another. However, other requirements have gained in importance, shifting the emphasis: **while in 2021 55% of the customers surveyed** in Germany, France, Italy, Spain, the Netherlands, Austria, and Switzerland **said that the cost of delivery was the most important criterion when choosing an online store, in 2022 this figure is just 32%.**

Considered cost of delivery the most important criterion when choosing an online store



This opinion was most pronounced in Switzerland at 38% and least in the Netherlands, where 22% felt that the cost of delivery would influence their choice of online store. The country-specific differences in prioritizing the cost of delivery have grown by 10 percentage points: in 2021, there were no more than seven percentage points between the countries.

Across all countries, the cost of delivery is joined by reliability (2021: 46%, 2022: 25%) and the speed of delivery (2021: 24%, 2022: 23%) to make up the top three reasons for choosing a specific online store. In Germany and France, re-evaluation of reliability as a key factor meant that it moved from second to third in importance: the speed of delivery, at 30%, is now the second most important aspect when choosing a provider in both countries. In 2021 this expectation was significantly lower in France at just 18% – and ranked fourth behind reliability (which ranked third in Germany in 2021 at 32%).

Although the cost of delivery remains the decisive criterion when choosing an online store, the latest survey shows that other requirements are increasingly gaining importance.

Nevertheless, the opinions also show a certain habituation effect among online shoppers: **more customers today feel that shipping should always be free**—especially in France, where the rate was already very high in 2021 at 32%. In 2022, the figure is now 36%. In Spain (2021: 39%), the expectation of free shipping has stabilized at a high level, currently at 38%.

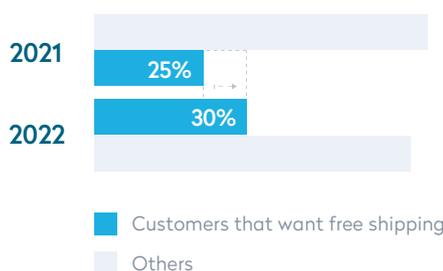
In Italy, where 10% of those surveyed said delivery did not always have to be free, 39% – i.e., most respondents – said their view of shipping costs depended primarily on the product and its availability. This means that Italian online shoppers who look for a very specific item and find it in an online store that can deliver quickly are most willing to overlook high shipping costs. On the other hand, 18% of respondents in Italy felt that delivery costs should depend first and foremost on the product's purchase price. Here too, we see a certain “learning effect”: in 2021, only 10% of those who took part in the study made this association.

In the Netherlands, on the other hand, this represents the view of the majority of respondents: 35% expected free delivery from a minimum order value of EUR 20, 10% from a minimum order value of EUR 50, and 2% only from a minimum order value of EUR 100. In total, that is 1% more than in 2021. The **Swiss** with 44% (2021: 35%) and the Germans and French with 40% each (2021: 32% and 38%) also felt in 2022 that delivery costs should relate to the order value – and the opinion was more prevalent than it was in the first survey a year ago. Among Spanish online customers, the figure is currently 30% (2021: 23%).



The weighting of the expectation of free delivery has shifted significantly in comparison to 2021: a year ago, a little over a quarter of respondents felt that delivery should always be free – in 2022, the expectation varies between a little over a third (Spain – 38%, France – 36%) and just under a quarter (Germany – 24%, Austria – 23%). Whereas in 2021, a little over a third said their acceptance of delivery costs depended on the order value; today, this figure is 37% across all countries. And while in 2021, around a third of customers said that, when it came to delivery costs, the pivotal factor was the type of product they wanted to buy and how available it was online, today, only a quarter of respondents express this opinion – with clear national differences.

Expectation of free delivery when shopping online



Acceptance of delivery costs depending on the order value



INSIGHT

Now more than ever, general delivery pricing seems to depend on the countries in which you operate (or would like to operate) as an online retailer. By learning more about the expectations of your target groups (which can differ significantly from country to country), you can take these into account when passing on shipping costs and calculating prices, aiding customer satisfaction and retention. It, therefore, pays to research customer expectations separately in each target market. As this study shows, learning and habituation effects can significantly change the acceptance of delivery terms within just 12 months. So if you are looking to tailor your delivery terms to individual countries, it is advisable to re-examine customer opinions from time to time.

2. Not just a question of money

2.2 The value we place on the environment

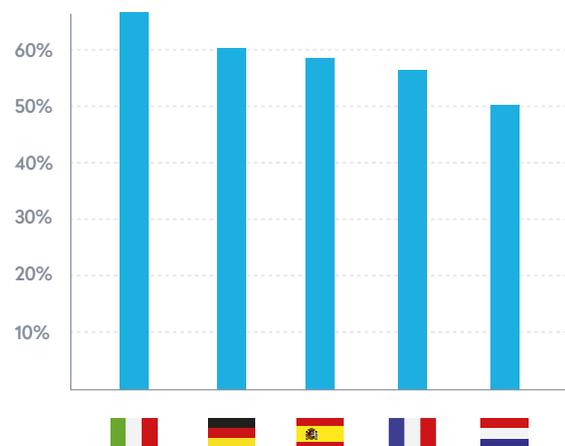
As Seven Senders showed in its study “**Roadmap 2025: Sustainability in European e-commerce**”, published in mid-2022, most European consumers wrongly believe that shopping online has a worse environmental footprint than brick-and-mortar retail. Even when e-tailers in all countries communicate their environmental record transparently and credibly, awareness of the environmental consequences of e-commerce differs significantly from country to country.

This survey of European customers’ shipping preferences again makes clear: that **half to just under two-thirds of online shoppers would be prepared to pay extra for sustainable delivery: this is most strongly felt in Italy (65%), followed by Germany (60%), Spain (59%) and France (58%).**

The report shows that the **lowest level of acceptance** for sustainable delivery options is currently in the **Netherlands**, where the figure is still 50%.

Asked in concrete terms where their financial pain barrier lies, between 18% (France) and 9% (Switzerland) of respondents would be willing to pay a 10-cent surcharge for sustainable delivery, while acceptance of a 20-cent surcharge is between 7% (Switzerland) and 14% (Italy). At 30 cents, 4% (Austria) to 10% (Germany) of online shoppers in Europe would still be on board, and between 2% (Austria, Switzerland) and 4% (Italy, France, Germany) of respondents could imagine paying a 40-cent surcharge. In 2021 the readiness to pay a surcharge of up to 40 cents was, on average, 50 to 100% lower.

Customers that are willing to pay for sustainable delivery



One surprising finding is that, while acceptance fell gradually between 10 and 40 cents, there was a significant upturn at 50 cents. In fact, even at a EUR 1 surcharge, acceptance was not significantly lower than at 30 cents (7% against an average of 6% for EUR 1) – and, on average, twice as high as at 40 cents. For example, **19% of Swiss respondents would be willing to pay a surcharge of 50 cents per shipment if shipping is climate-friendly. In France and Spain the figures in this price bracket are just 9% and in Germany 17%.**

When asked about additional costs for sustainable delivery, between 11% (Germany) and 17% (Switzerland) of respondents linked it to the value of the product. If we view this as approval for additional costs to protect the environment, the result is an average of 70% willingness to dig deeper into pockets for sustainable delivery. In 2021 this figure was 57%.

There does not seem to be much consensus in Europe regarding the form sustainable delivery should take. However, the **focus** of consumer concerns appears to be on **reusable or eco-friendly packaging**: in 2021, 57% in Switzerland and Austria, 56% in Germany, 53% in Spain, 48% in Italy, and 47% each in France and the Netherlands gave this response.

When repeating the survey in 2022, the question was asked differently, namely, what online shoppers themselves would be most likely to do to reduce the environmental footprint of their purchases. Here too, the majority (31%) of all respondents favored recyclable packaging. On average, across the countries, significantly fewer were willing to have their parcel delivered to a parcel store (13%) or parcel locker (7%) or to avoid returns (28%) to reduce avoidable emissions. Nevertheless, it emerged that the tendency to avoid returns when shopping is greatest in the German-speaking region (Germany and Austria 46%, Switzerland 40%). Online shoppers in Italy (8%) and Spain (14%) have barely given the issue any thought.



France, however, stands out for a willingness to have parcels delivered to a parcel store: at 31%, acceptance of this option is six times as high as in Germany and more than five times as high as in Austria and Switzerland.



INSIGHT

Seven Senders also showed in its study “Roadmap 2025: Sustainability in European e-commerce,” published in mid-2022, that the issue of sustainability is very important to online customers. E-tailers should take advantage of the findings – and provide clear information to highlight their business’ environmental credentials. An added benefit could be encouraging online customers to join in, for example, to reduce return rates or enable delivery to a parcel store or parcel locker – PUDO (pick-up and drop-off) cuts traffic congestion and CO₂ emissions through guaranteed delivery. Both create a win-win situation for the environment and e-commerce. All countries also undervalue the option of shipping via sustainable carriers. Seven Senders customers, for example, can choose a product that offsets emissions via investments in certified carbon-reduction projects.



2. Not just a question of money

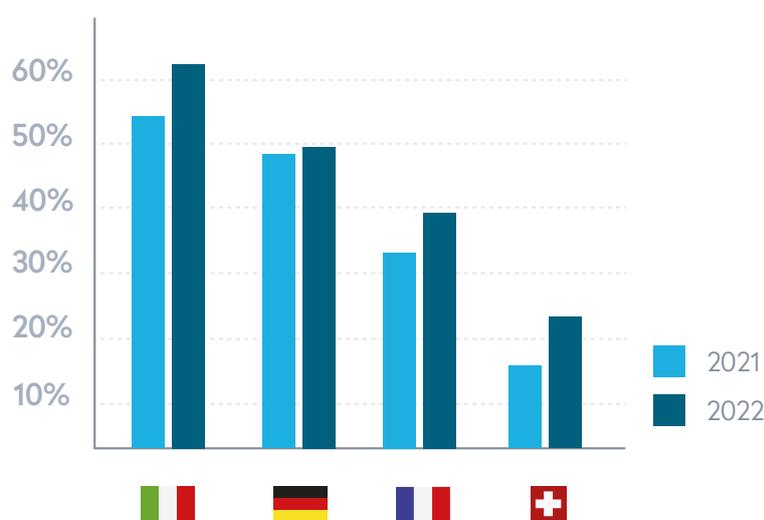
2.3 Every country has its preferred payment method

The fact that Switzerland, outside the Euro zone and home to many banks, differs from other countries in Europe when it comes to payment methods may not come as any surprise. However, the first Seven Senders study on European customers' expectations, "Different countries, different shipping preferences," published in 2021, highlighted how much the other countries differ from one another regarding preferred payment methods.

ONLINE PAYMENT PROVIDER

In **Italy**, online payment providers such as **PayPal** are gaining ground: while 51% of e-commerce customers preferred to use them in 2021, the figure in 2022 is already 59%. In Germany, growth is more moderate (2021: 46%, 2022: 47%). In Spain, the Netherlands, France, and Austria, a little over two-thirds of customers trust PayPal, etc. – again a slight upward trend. Among these, online payment providers have **seen the biggest increase in business in France** – from 30% in 2021 to 37% in 2022. In Switzerland, 20% of online customers now use this payment method (2021: 12%).

Growth of trust in online payment providers (for example, PayPal)



CREDIT CARD

The rise of online payment providers brought a decline in credit card use, even in France, which topped the rankings with 58% in 2021. Today this figure is 57%, just 20% points ahead of PayPal, etc. The trend is similar in Spain (2021: 47%, 2022: 46%). In 2022, only the **Swiss remain “hard users” of plastic money**, with around a third of customers preferring it.



PAYMENT BY INVOICE

The Swiss still prefer payment by invoice, although there has been a **clear decline since 2021**: while our first survey showed 50% of online shoppers preferring to pay this way, in 2022, the figure is just 38%. Demand for payment by invoice is also declining - to 30% in Germany and 32% in Austria in 2022 (34% in 2021).

INSTANT BANK TRANSFER

In the **Netherlands**, a similar proportion has a preference for payment by instant bank transfer: **Its popularity has risen from 29% in 2021 to 36%**, while it languishes in the single-digit zone in the remaining European countries – with the exception of Germany (10%) and Austria (13%).

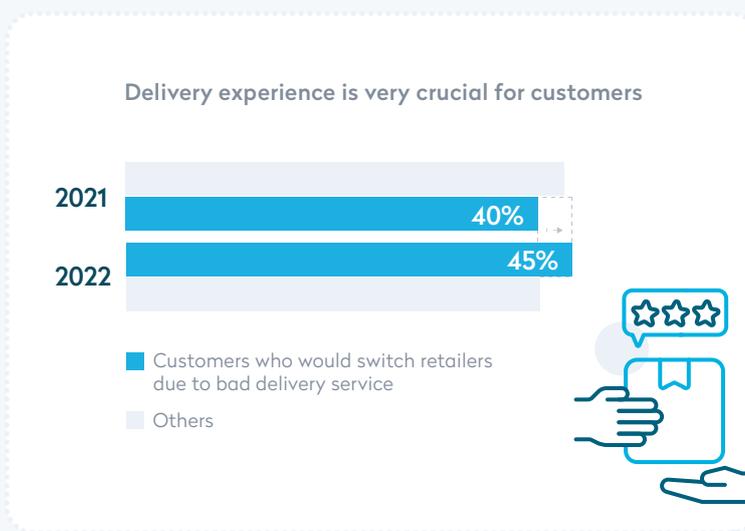


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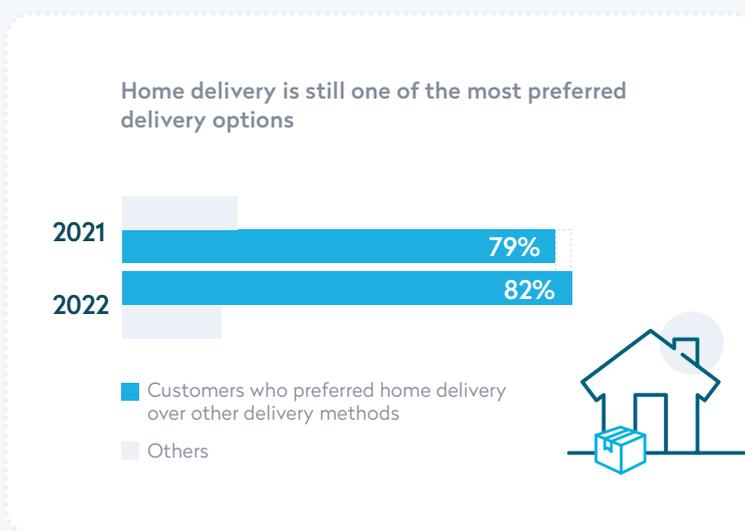
Online retailers looking to launch in or expand into other European countries should examine the preferred payment methods there – a missing payment option can result in an abandoned shopping cart. As demonstrated in this study, it's evident that national preferences differ widely. The Swiss appreciate the option to pay by invoice, the Dutch like instant bank transfers, credit card is the most common payment method for the French, and for Italian shoppers, the option of using an online payment provider such as PayPal is increasingly a must.

3. What customers want most: Delivery preferences

Customers ordering online expect a smooth transaction, i.e., a convenient, straightforward, and reliable delivery experience. As varied as the national differences in online shopping preferences are, this is where respondents in all seven European countries agreed. And each country is equally demanding: a comparison between the results of the two surveys shows that more customers today **would blame the online retailer for a poor delivery experience than in 2021. Last year 40% of consumers said that they would switch retailers and no longer buy from a store if they were unsatisfied with the delivery. In 2022 this figure has risen to 45%**, underlining how important it is to be aware of online customers' wishes and provide a delivery tailored to their needs.



Where the preferred delivery method is concerned, the latest study did not reveal any major surprises: the strong preference for **home delivery**, which averaged **79%** across all respondents in 2021, has intensified and **has now reached 82%**.



The front runners here are the **Austrians with 89%** (2021: 86%), closely followed by the **Dutch and the Germans, each with 86%** (2021: 76% and 79%). Bringing up the rear are the **French online shoppers with 72%** (2021: 63%). 19% of them still value being able to **collect their parcel from the post office** or a parcel store (2021: 22%). In all other countries, this option enjoys limited popularity, less than 4% – except in Italy and Spain, where the figure is 8% (2021: 5% and 6%). Lagging in all countries with 2% to a maximum of 7% are the delivery options to the workplace, click & collect, and delivery to a parcel locker. In Germany, where there was already little interest, their popularity has fallen from 8% to 7% in 2022.



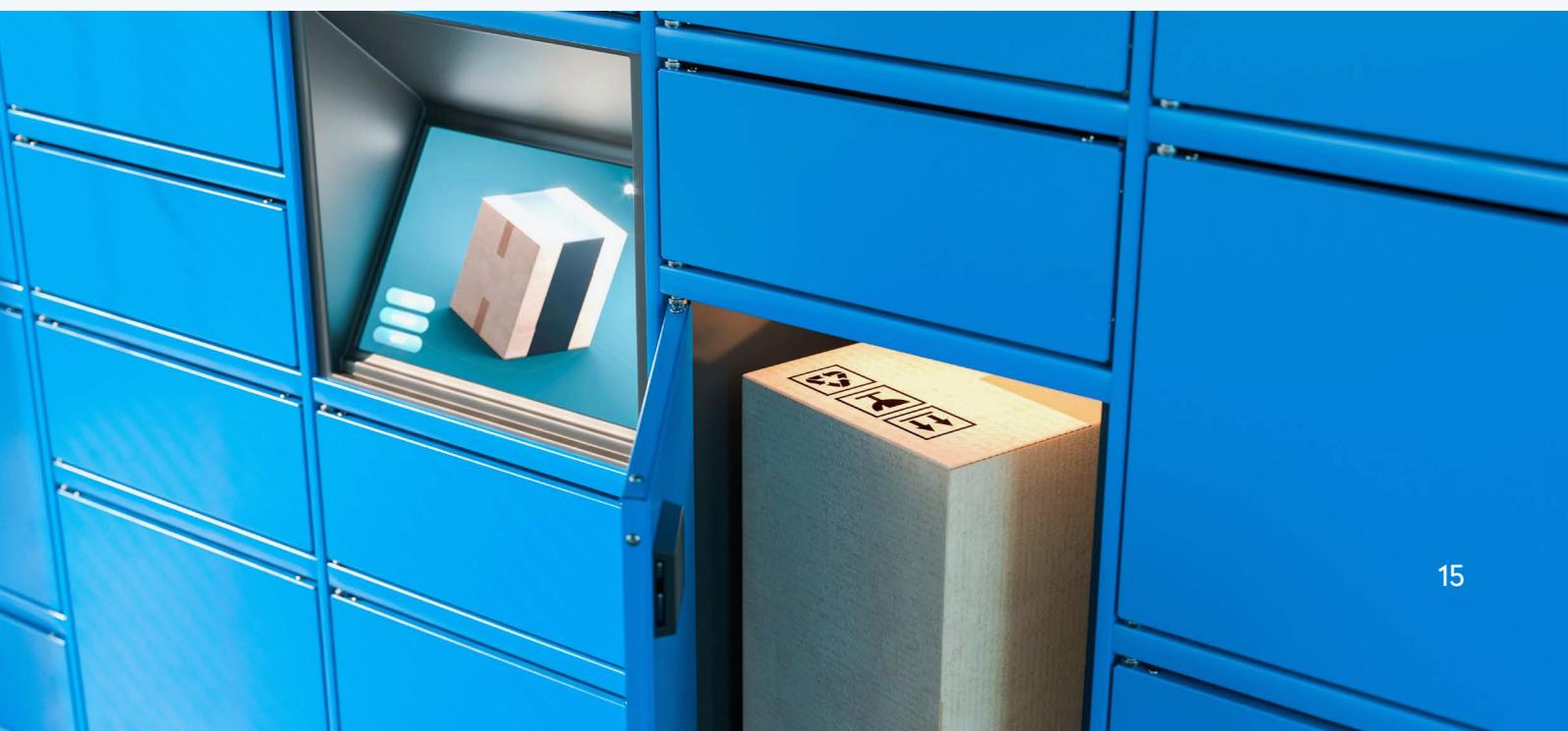
Taking all pick-up and drop-off (PUDO) options together, it seems that in France in particular, they are a popular alternative to home delivery, enjoying 22% acceptance there.

They offer major efficiency and climate protection benefits, as shipments are delivered on the first attempt. They also reduce the time and mileage drivers spend on a delivery – which benefits the environment.



INSIGHT

Online customers' delivery preferences seem simple: almost 9 out of 10 want their orders to be delivered to their home. On closer inspection, however, it could be worthwhile directing consumers to climate-friendly delivery options at checkout and making the benefits of alternatives of options like PUDO or carbon offsetting more transparent. Seven Senders can help you tailor your shipping operations to meet regionally diverse preferences and offer customized options. Our extensive network also allows us to combine the individual competencies of our various carriers, and our optimized logistics process means you only deal with one contact person.



4. Cross-border shipping: The boundaries of patience

People placing orders today generally expect quick delivery. For 23% of those surveyed (2021: 26%), fast delivery of an order is an important criterion when choosing an online store. It forms one of the top three reasons for opting for a specific retailer, along with low costs and reliability.

However, online customers are willing more patient if the order comes from abroad. **If they know that the store operator doesn't have a branch in their country, 87% of respondents are willing to accept a delivery time of three to more than seven days.** The largest group, averaging 43% (2021: 39%), would consider a **delivery time frame of three to four days acceptable.**



Not only are the respondents from the different countries largely unanimous here, but there is no notable change compared to the previous year. The time frame for cross-border deliveries appears to be set in this bracket. If deliveries do take longer, however, and between five days and a week elapse before they arrive, the Swiss are most likely to be relaxed about it (48%), followed by the French (44%) and the Italians (43%). The Dutch have the most limited patience here (31% for a delivery time of five to seven days). **However, very few can imagine waiting more than a week for a delivery from abroad: the acceptance rates here are in the lower single-digit range.**



INSIGHT

Anyone looking to scale up their e-commerce business and open up new European markets can count on its international customers to make allowances for the speed of the delivery. Most assume that cross-border shipping will take a few days longer. However, most online shoppers do not want to be burdened with extra costs. Some of your competitors will already have adapted to this. A low-cost, fast logistics solution can be an excellent tool to help you improve the delivery experience and stand out in the market.

5. Back to the start: Returns management creates customer satisfaction

The survey for the first Seven Senders study on European customers' expectations, "Different countries, different shipping preferences," published in 2021, showed that expectations of the returns process differed dramatically from country to country. In 2021 an average of 27% of respondents across all countries specified returns management as one of the criteria for choosing an online store. In 2022 this figure had fallen to just 9%. However, in this second edition of our survey, the true preferences lie in the detail.

Across all countries, over a third of those surveyed emphasized that they valued a **clear and transparent returns process**: consumers in all countries appreciate easily locatable information, transparent conditions for returning the goods, and straightforward documentation to download. Online customers in Switzerland and Austria value these more (42% and 40%), while these aspects are least important to the Dutch and Spanish (34% and 36%).

When asked how important it is to be able to drop off the **parcel at any drop-off point/parcel store**, the Germans and Dutch are similar: around one in five saw this as an important criterion. By contrast, only 11% of Swiss online shoppers attach importance to flexible returns.

Unsurprisingly, the most important aspect where returns are concerned is whether **the goods can be returned free of charge**. Across all countries, almost **two-thirds of those surveyed (61%) expect this to be the case**. This attitude is most pronounced in France and Switzerland (64%), while customers in Italy and Spain have a relatively low expectation in this regard, each with 58%.



61%

of all customers across all countries expect free returns

For around a third (31%), a quick refund of the purchase price is an important factor – and one of the top three criteria on the online shopping wish list. Here France stands out above the average at 46% – perhaps a result of the preferred payment by credit card, which allows money to be refunded quickly. In Switzerland (19%) and Austria (25%), customers are slightly more patient regarding refunds.



INSIGHT

It is important to retain satisfied customers, even if the product they ordered wasn't right for them: effective, professional returns management plays a huge role in ensuring a positive shopping experience. As our study shows, most customers expect free returns yet also want online retail to be more sustainable. E-tailers, therefore, should encourage more conscious consumption by providing transparent and detailed environmental information at checkout, thus helping to keep their returns rate low – and significantly improving the carbon footprint of their online shopping. Creating a high level of awareness of the need to make a voluntary contribution to environmental protection would also be the best way to prepare them for the upcoming legislative changes designed to prevent free returns.



6. Summary

32% of the respondents – 18% fewer than in 2021 – said that the cost of delivery is the most important criterion when choosing an online store.

38% of Spanish and 36% of French customers expected free delivery, but only 23% of Swiss and Austrian customers. The speed of delivery, which was the second most important criterion when choosing a specific supplier in 2021, was squeezed down to third place (23%) in 2022 by delivery reliability on 25%.



57% of the respondents would be willing up to a certain amount to pay more for sustainable delivery.

This figure has not changed since 2021 – and applies up to a certain amount or depending on the value of the parcel. 35% of respondents were willing to accept additional costs of 10 to 40 cents, while 21% would even agree to a surcharge of between 50 cents and more than EUR 1. The Italians (65%) are the most willing to pay extra for greater sustainability. The Austrians (2021: 67%) and Swiss (2021: 66%) were less keen in 2022 to dig deeper into their pockets for greater environmental protection (52% and 53%).



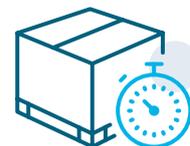
82% of respondents want home delivery.

However, for 22% of French respondents, a post office branch, parcel store, or parcel locker is the preferred pick-up point. The desire for convenience is higher in all countries than in 2021.



87% of respondents are willing to accept a longer delivery time if the product is coming from abroad.

In Switzerland, almost half of online customers (48%) will accept delivery times of five to seven days. The Dutch are the most impatient – only 31% would accept delivery times of five days to a week.



22% of respondents in France saw pick-up and drop-off options (PUDO) as a good alternative to home delivery.

These options offer major benefits in terms of efficiency and climate protection, speed up deliveries, and reduce costs. Best practices from the Netherlands⁸ show that online customers can be motivated to select these options on checkout if targeted information is provided – even though, at 10%, acceptance in the Netherlands is not even half as high as in France.



61% of respondents expect returns to be free of charge.

At 64%, approval of free returns is especially high in France and Switzerland. This is particularly critical in the case of France, where awareness of the environmental benefits of avoiding returns is comparatively low at 19%. By comparison, in Switzerland, willingness is over twice as high at 40%.





INSIGHT

The 2022 edition of the Seven Senders consumer study confirms the findings presented in 2021's "Different countries, different shipping preferences," namely, online customers' expectations and requirements regarding e-commerce providers vary from country to country, at times dramatically. Services tailored as closely as possible to the different consumer preferences can be valuable to many aspects of the sales and delivery process. Any business looking to master this complex challenge can rely on a strong partner like Seven Senders. As Europe's largest delivery platform for parcel shipping, we not only work with an extensive network of carriers but also have a wealth of international expertise in all areas of shipping and delivery. We know exactly what makes European customers tick and what they expect of an e-commerce shop right now. No matter what challenges or tasks you currently face as an online retailer, we have the answers and the right solution for your needs. With our experience and our wide portfolio of services, we can provide efficient and ongoing support to help you gain a competitive edge in the international e-commerce market.

“ We are the partner of choice for ambitious online retailers. Through our experience and unbeatable network, we provide targeted, effective support for businesses as they look to expand and move into new markets. The new edition of our study provides important insights into country-specific differences in customer expectations. Use them to create an even better, more individualized delivery experience, establish more customer loyalty and unique selling propositions, and thus further drive your business success and expansion. ”



Thomas Hagemann

Founder and Co-CEO of Seven Senders GmbH

7. About us / Imprint

ABOUT SEVEN SENDERS

Seven Senders is the leading delivery platform for parcel shipping. The company, founded in 2015 by Johannes Plehn and Thomas Hagemann, connects shippers with its carrier network of more than 100 parcel delivery agents throughout Europe to offer excellent, local shipping as a competitive advantage. With additional shipping services from a plug-and-play label solution to EU-wide digital claim management, analytics and tracking tools, Seven Senders makes international shipping easy.



BACKGROUND OF THE STUDY

The data used is based on a digital, app-based survey conducted by Appinio between April 27 and 29, 2022, with 3,500 respondents in the Austria, France, Germany, Italy, Netherlands, Spain and Switzerland. The results were weighted and are representative of the population (aged 16 and over) in each country.

There was an equal gender balance of respondents (1,750 women and 1,750 men). The majority of respondents were above 55 years old (1,318), 640 were between 45 and 54 years old, 582 were between 35 and 44, 532 were between 25 and 34, 342 were between 18 and 24, and 86 were between 16 and 18. 34% of the respondents live in an urban area, 37% in a suburban area, and 29% in a rural area. With regard to the gender, age, and residential environment of the respondents, no major differences were observed in the answers, except where specified.

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8. Endnotes

1. <https://www.bevh.org/presse/pressemitteilungen/details/sondererhebung-zur-ersten-haelfte-des-2-quartals-wachstum-im-e-commerce-normalisiert-sich-weiter.html>
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