



Country factsheet - September 2013

France

France is one of the biggest e-commerce markets, with huge development potential.

It's the sixth biggest in the world and the third biggest in Europe, behind the United Kingdom and Germany. As of H1 2013 France is home to 33 million e-shoppers, up 5% on the 2012 figure.

1. The French consumer

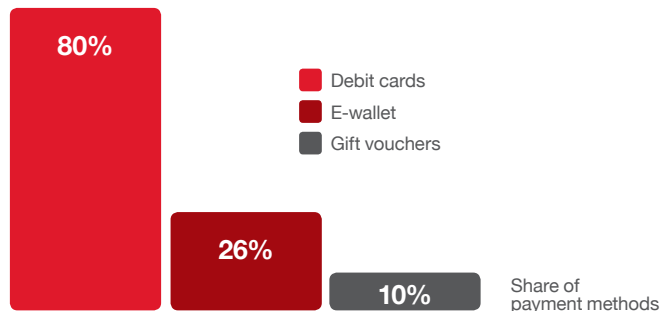
“France is home to 33 million e-shoppers”

Who shops online in France?

In the first half of 2013 the number of online shoppers continued to rise in lock-step with the rise in the number of online users. But who are these French e-shoppers? Men currently buy a little more online than women (59% versus 53%). The share of women is growing year on year, though. It's primarily **the young, those with qualifications** and **members of higher management** who shop online. However, online shopping is spreading among all generations and all occupations.

What is the behavioural type of the French e-consumer?

Google accounts for 90% of web searches in France, which shows how important good referencing is to e-tailers. On average, the French e-shopper completes 16 transactions per year, with average spend at 87.5 euros and **total spend at 1400 euros**. According to a study by Rakuten, published at Ecommercemag.fr, **the French e-consumer buys more online on Wednesdays** than on any other day of the week, **primarily in the early evening** around 6-7 pm. The preferred payment method for **80% of French e-shoppers is their bank card**, 26% use an e-wallet and 10% use gift vouchers.



Price appears to be the **primary selection criteria** when the French shop online. They visit various websites, **comparing prices before they buy**. Choice is also a decisive factor for 47% of e-consumers.

What do French e-consumers buy?

A change in consumer online buying habits has been observed, particularly when **shopping for shoes**. Although consumers have always preferred to see, feel and try on this type of product before they buy, **the success of Spartoo and Sarenza** is clear evidence of a change in behaviour.

More women than men buy clothes and sports equipment online. On the other hand, hi-fi equipment, software and financial products are most often bought by men. Young people mainly buy clothes, books and music.

How do the French experience e-shopping?

Over the past six months **97% of French consumers say they are satisfied with their online purchases**. Home delivery is by far the most popular delivery method, preferred by 82% of e-shoppers, ahead of delivery at a neighbourhood shop, preferred by 58%.



On the whole, French people are also satisfied with their experience of delivery of their online purchases. However, 54% are not happy with how much they have to pay for delivery; for more than half of respondents it's one of the main reasons not to buy. Almost half of e-consumers say they have had to deal with a delivery problem. The most common reasons include cancelled orders due to stock shortage and the delivery of a product that does not match the description. **More than one person in four say they have exchanged at least one online purchase. For nine French people in ten, unpacking the parcel in the presence of the person who delivers it to them** strikes them as a good way of checking the contents and avoiding this type of inconvenience.

2. The French market

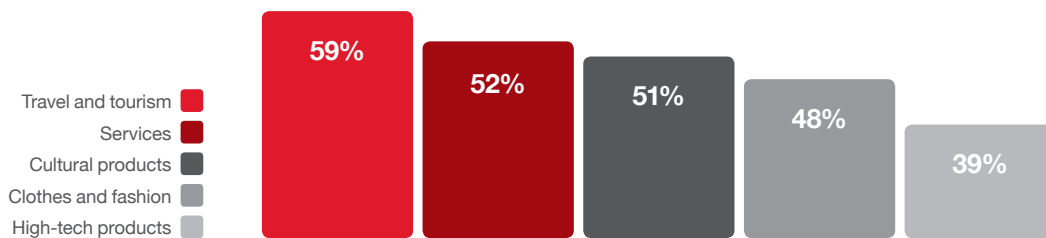
“France now has 120,000 active e-commerce websites.”

In France, the online sales market has experienced constant growth. Between 2009 and 2012 the e-commerce market **grew by 80%**, from 25 billion euros to **45 billion euros**. According to Fevad, France is now home to **120,000 active e-commerce websites**. In a few years, marketplaces have become an essential sales medium for e-tailers. They represent over 25 million potential shoppers and they grew 50% in the first quarter of 2013. **Amazon** tops the list of most visited French websites in 2013, with 15 million unique visitors per month. **Cdiscount, Fnac, eBay and Priceminister** complete the top five. In the first quarter of 2013, almost two web users in three visited at least one of the top 15 websites every month on average.



Which sectors are most involved in e-consumption?

E-commerce has now spread to all economic sectors. Not a single sector has escaped the spread of online business. The most popular products and services among French e-consumers are **travel and tourism**. 59% of web users have bought a trip or a travel ticket online. The rest of the top five is made up of **services** (52%), **cultural products** (51%), **clothes and fashion** (48%) and **high-tech products** (39%). On the other hand, food, sports equipment and car parts are among the least popular e-commerce products and services.



Share of the most popular products...

3. Trends on the French market

As in other countries, the **m-commerce** market is gaining ground all the time in France. In 2012 turnover was 1 billion euros and the market grew by 150% compared with 2011.

Cross-border development

The percentage of French e-tailers with an international presence rose in 2013: **56% of them already have one and 14% have plans in that direction**. Over the next two years, 85% of company directors expect their cross-border turnover to rise.

Belgium (83%), northern and southern Europe are among French e-tailers' preferred markets.

Use of vouchers

A 2013 survey by CCM Benchmark shows that **73% of French web users have used a promotional code to buy something online**. Vouchers are a purchasing trigger for 56% of them. They also increase the average spend and shopping frequency: **69% of users add more articles to their basket to qualify for a discount**.

Use of video

In 2013 French e-commerce sites ought to make better use of video to present their products from every angle, give demonstrations and so drive sales. Video helps e-consumers visualise and adopt the product better.

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