

CZECH Digital consumer 2021

2. 12. 2021 – MARTIN SVOBODA (APEK)





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Asociace pro elektronickou komerci

- APEK – Czech e-commerce association
- Almost 600 members
- Education
- Studies
- Events
- Legislation
- Public Affairs



Czech Republic

Population:	10,7 millions
Internet users:	88 %
E-shoppers:	78 %
Currency:	Koruna (CZK - Czech Crown)
Official Language:	Czech



Czech e-commerce market

- On-line retail **2020** 196 billions CZK
 - -> **7,5 billions EUR**
- Year to year growth **26 %**
- Retail share CZ **16,8 %**
- Active on-line shops **49 500**
- **5,29 million** on-line shoppers





Turnovers share by category (TOP 6)



Electronics 40,66 %



Groceries 7,26 %



DIY 7,95 %



Furniture 5,81 %



Cosmetics 7,45 %



Sports 5,50 %



Most popular categories

What did you buy at least once on-line last 12 months?

TOP 3 Products



Clothes,
shoes

63 %



Cosmetics,
perfumes

44 %



Sports clothes,
sports equipment

41 %

Internet consumers, N=1389

TOP 3 Services



Transportation

34 %



Mobile services

20 %



Financial and
insurance services

17 %

Internet consumers, N=1389



Payment methods

What kind of payment method did you use most?

On-line payment by card 45,7 %

Bank transfer 15,1 %

Cash on delivery (cash) 9,2 %

Cash on delivery (card) 8,6 %

Card on pick-up point 5,1 %

Cash on pick-up point 4,5 %

PayPal (and similar) 4,3 %

Google Pay 3,7 %



Payment methods

What kind of payment method did you use at least once?

On-line payment by card 69,2 %

Bank transfer 60,3 %

Cash on delivery (cash) 47,9 %

Card on pick-up point 45,9 %

Cash on pick-up point 44,7 %

Cash on delivery (card) 42,3 %

PayPal (and similar) 26,8 %

Google Pay 21,0 %



Delivery methods

What kind of delivery method do you choose most?

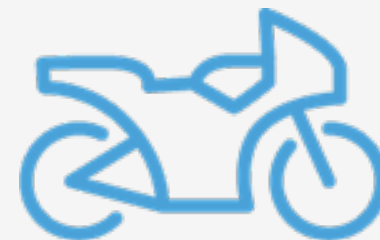
Home	45,0 %
External pick-up point	26,9 %
Shop´s pick-up point	14,9 %
Work	7,0 %
Pick-up box (automated)	3,7 %



Delivery methods

How do you choose delivery method?

Costs	38,1 %
Depending on the order	15,8 %
Based on previous experience	14,0 %
Comparing price and quality	11,0 %
Always the same method	9,0 %
Delivery time	6,1 %
Connected to the payment	5,2 %



Czech digital consumer

Ordering at least once per 14 days TYPICAL CONSUMER

27 % of Czech internet users 15+ orders at least 1x per 14 days



42 %

AGE
25–34



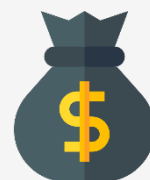
40 %

EDUCATION
UNIVERSITY



40 %

CITY



38 %

PERSONAL NET INCOME
EXCEEDING CZK 20 000



44 %

PARENT OF CHILD
0–3 YEARS

CZECH consumer



80 % on-line users feels on-line shopping as useful **time savings**.



35 % likes to try **new on-line shops**, **77 %** likes to buy in already tested shops.



50 % **choose on-line shop based on the price**, **45 %** are ready to pay more for good services and quality.



25 % of parrents has **less time for shopping**, so they do shopping on-line more.



Favourite on-line shops of **friends**, interests **30 %** of on-line consumers.



42 % on-line shoppers prefer **ecological and sustainable oriented goods and shops**.



Sales, coupons and vouchers are important for **67 %**.



Only **16 %** of on-line shoppers prefer concrete brands and goods.



CZECH consumer

70 %

22 % clearly

On-line users **prefer on-line shopping**
comparing to traditional stores

85 %

40 % clearly

Have their **favourite on-line shops** where do they shop periodically

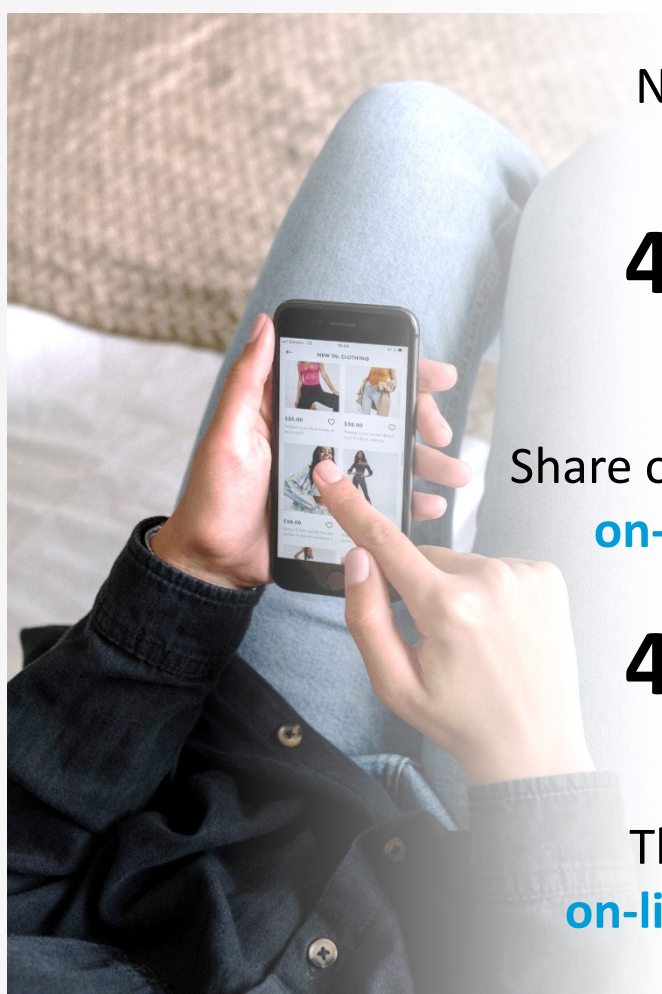
The majority of on-line customers still
prefer to shop for certain types of goods
in brick-and-mortar stores

87 %



CZECH consumer

How did the consumer changed in 2021?



Numbers of consumers who **buy mostly by mobile phone** increased. **36 %**
+5 %

40 % Share of consumers who buy on-line **almost all kind of goods is increasing.**
+5 %

Share of consumers who highly **prefer purchases on-line** comparing to brick-and-mortar store. **22 %**
+ 4 %

41 % Increased **share of indecisive customers.**
+4 %

The share of loyal customers **who return to on-line shops with good previous experience.** **77 %**
+4 %



CZECH consumer

Typical on-line customer - GROCERIES

Share of customers in last 12 months 30 %
Average number of purchases per year 10,7

Women 33 %
Experienced e-shopper 54 %
25–34 years 46 %
College 40 %
Big cities 44 %
Prague and Central Bohemia 42 %
Parrent of child up to 3 years 43 %



CZECH consumer

Typical on-line customer – COSMETICS, PERFUMES

Share of customers in last 12 month 44 %

Average number of purchases per year 4,8

Women 59 %

Experienced e-shopper 60 %

25–44 years 47 %

College 50 %



CZECH consumer

Typical on-line customer - PHARMACIES

Share of customers in last 12 month 36 %

Average number of purchases per year 4,3

Women 45 %

Experienced e-shopper 54 %

College 41 %

Big cities 45 %

Prague and Central Bohemia 43 %

Parrent of child up to 3 years 47 %



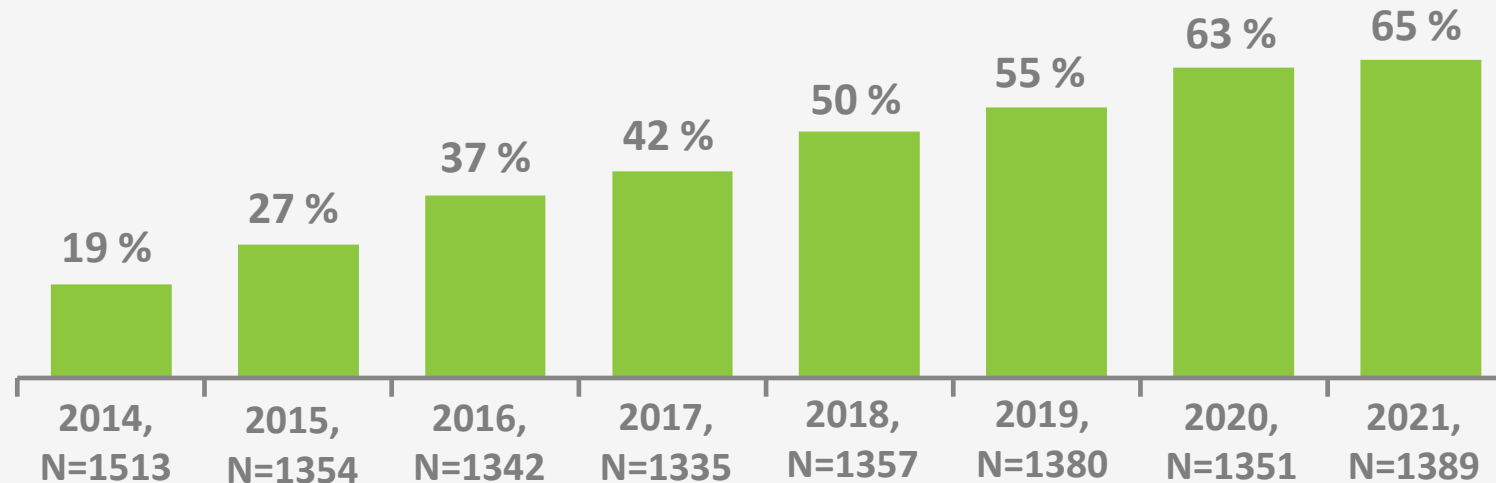
CZECH consumer M-Commerce



59 % of Czech on-line users **made purchase** using their **mobile phone** at least once.



94 % of Czech m-shoppers are **satisfied** with their m-purchases.



CZECH consumer

Cross-border purchases



50 %

**Buy cross-
border**



86 %

**Better
prices**



81 %

**Of cross-border
purchases are
from China**



61 %

**Wider range
of goods**

Czech on-line consumer

- Experienced
- Expecting best services
- Delivery up to 2 working days
- Thousands of pick-up points and boxes
- Price x loaylity
- Well known of his rights





Questions?

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