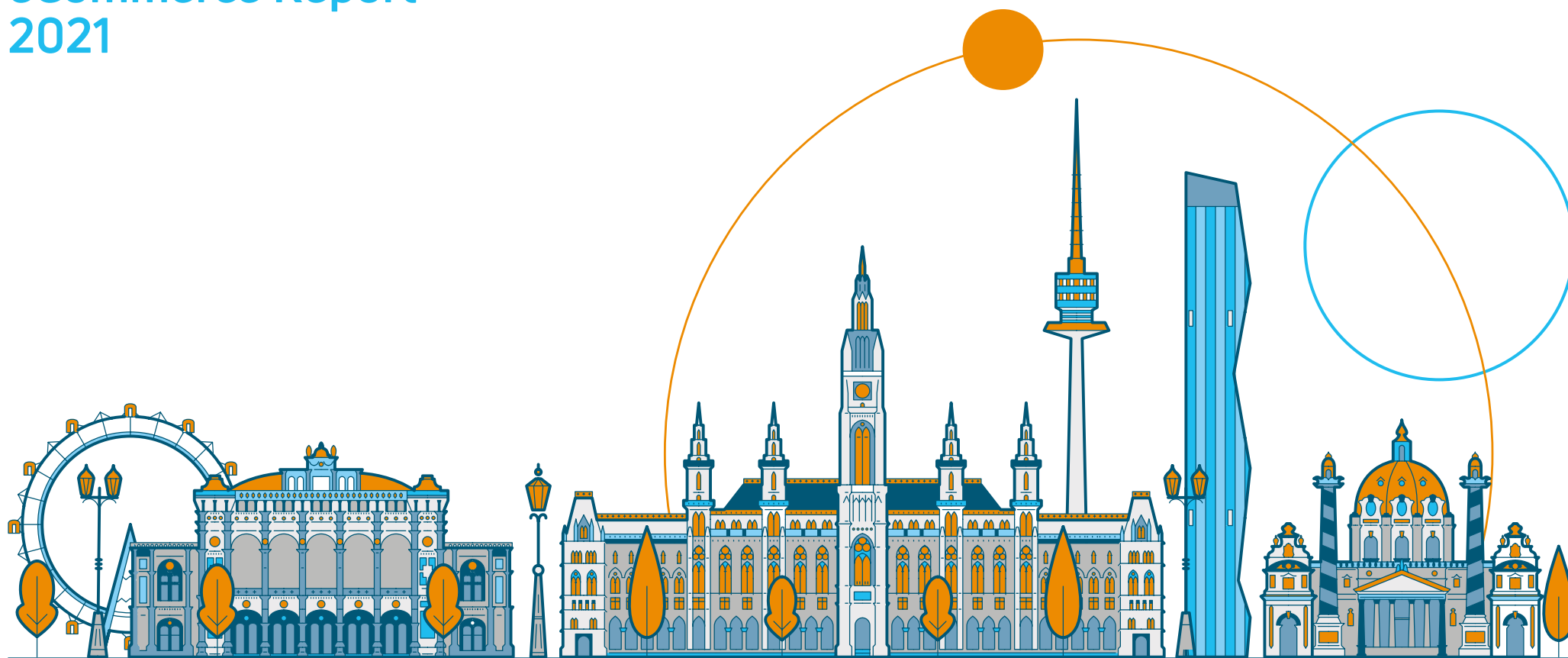


# Austrian

eCommerce Report  
2021



# No end of growth in sight!



Online trade is in the fast lane - and doesn't seem to be slowing down during the second year of the pandemic. Around 15% of all Austrian retail spending goes into eCommerce, a new record for the country.

It seems there is no end in sight to the growth, as the figures from this E-Com report show. We trust that the 2021 Austria eCommerce report will ensure that the 15,000 domestic web shops will benefit from today's recent developments and trends.

Here's to the continual growth of Austrian eCommerce. Enjoy the report.

- Rainer Will, CEO – Austrian Trade Association



# Austrian eCommerce Report 2021

The regional purchasing behaviour in 2021 shows just how cautious Austrians were. The pandemic made its mark, leaving hardly any appetite for non-essential products. Instead, Austrians seem to be more hesitant about their online spending. But that doesn't mean that eCommerce doesn't have a role to play.

The growth in services and travel show that online business still has potential. As of now, however, we cannot say whether the buying behaviour of Austrians has changed forever or is merely temporary.

In addition to general buying behavior, the preferences of Austrians have not changed significantly. However, convenience is becoming more important to the average customer than other aspects - including price. In addition, simplicity and service are still the most important things for Austrians to complete their online orders. If eCommerce shops want to be successful in Austria, they have to take this to heart and focus on the shopping experience instead of lowering prices.

This report is extremely valuable for today's eCommerce businesses. Due to the uncertain geopolitical environment, as well as new consumer buying habits and expectations, all online shops depend on eCommerce insights to find a path forward. Our report is a valuable guide for local webshops

to thrive in these turbulent times. It reveals how local customers buy, identifies the strengths and weaknesses of international competitors, and shows industry opportunities for shops to grow and adapt.

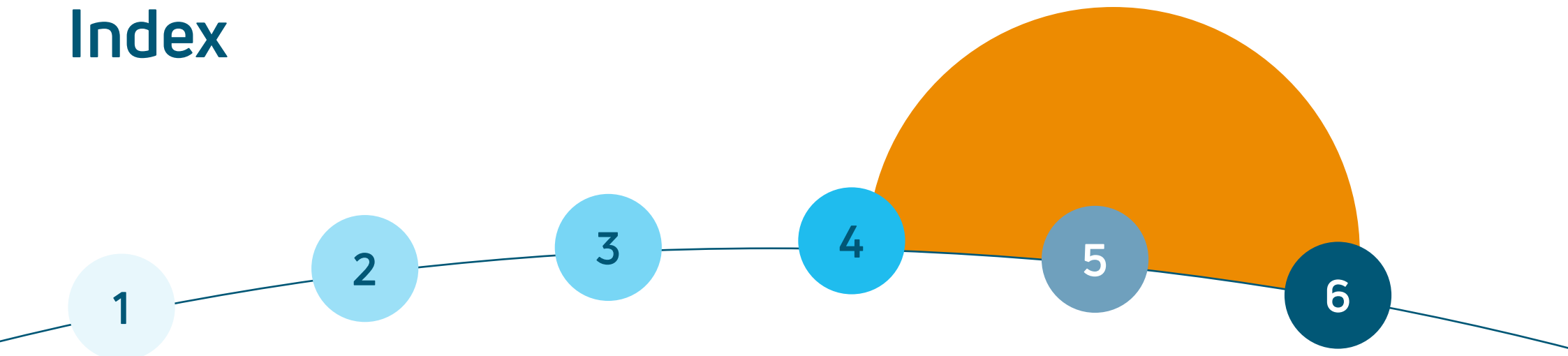
Additionally, if you want to do business with new European markets, you can also benefit from other country-specific reports - available on our website.

As always, Nets/Concardis is here to help you make the most out of every region and opportunity. We hope that the report offers you useful insights to start a new year full of potential with your business.

**- Damir Leko, Country Director Austria,  
Nets/Concardis**



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# Market overview

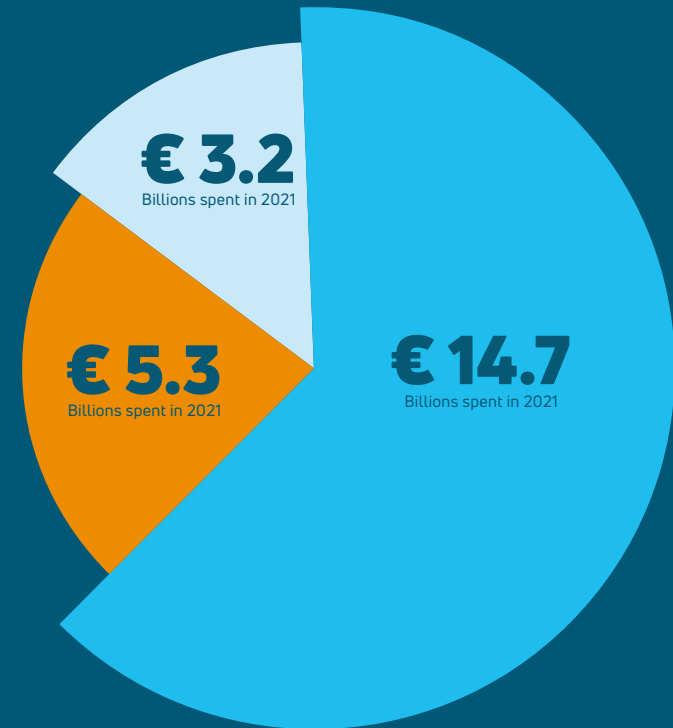
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# A cautious return to eCommerce

It's no secret that Corona has hit countries hard worldwide, but after the lockdowns and restrictions, eCommerce was expected to experience significantly higher sales. This expectation was met in some countries, but others reacted rather cautiously to the lifted restrictions. They bought products primarily as a need, instead of shopping with abandon. Austria is one such country that reacted more cautiously in 2021. Perhaps it was due to strict corona lockdowns, vaccination regulations, restrictions and ongoing protests in the region - but the effects were definite. The effects of these actions have been estimated to cost around 400 000 jobs and 3.6 billion Euros.

All in all, it was an average year for Austrian eCommerce – shrinking by 0.3% over the monumental year that was 2020. The purchasing of goods may have dropped by about 8.3% as we return to stores, but travel has made up the shortfall with gains of 43% while services lost 10% from last year. It's clear that Austrian shoppers are taking a pragmatic approach to their online shopping for the time being and keeping tabs on what could happen on the horizon. Either way, people are still spending money online, and eCommerce shops continue to benefit.



▲ 43%

Travel services increase in 2021

▼ -10%

Services decrease in 2021

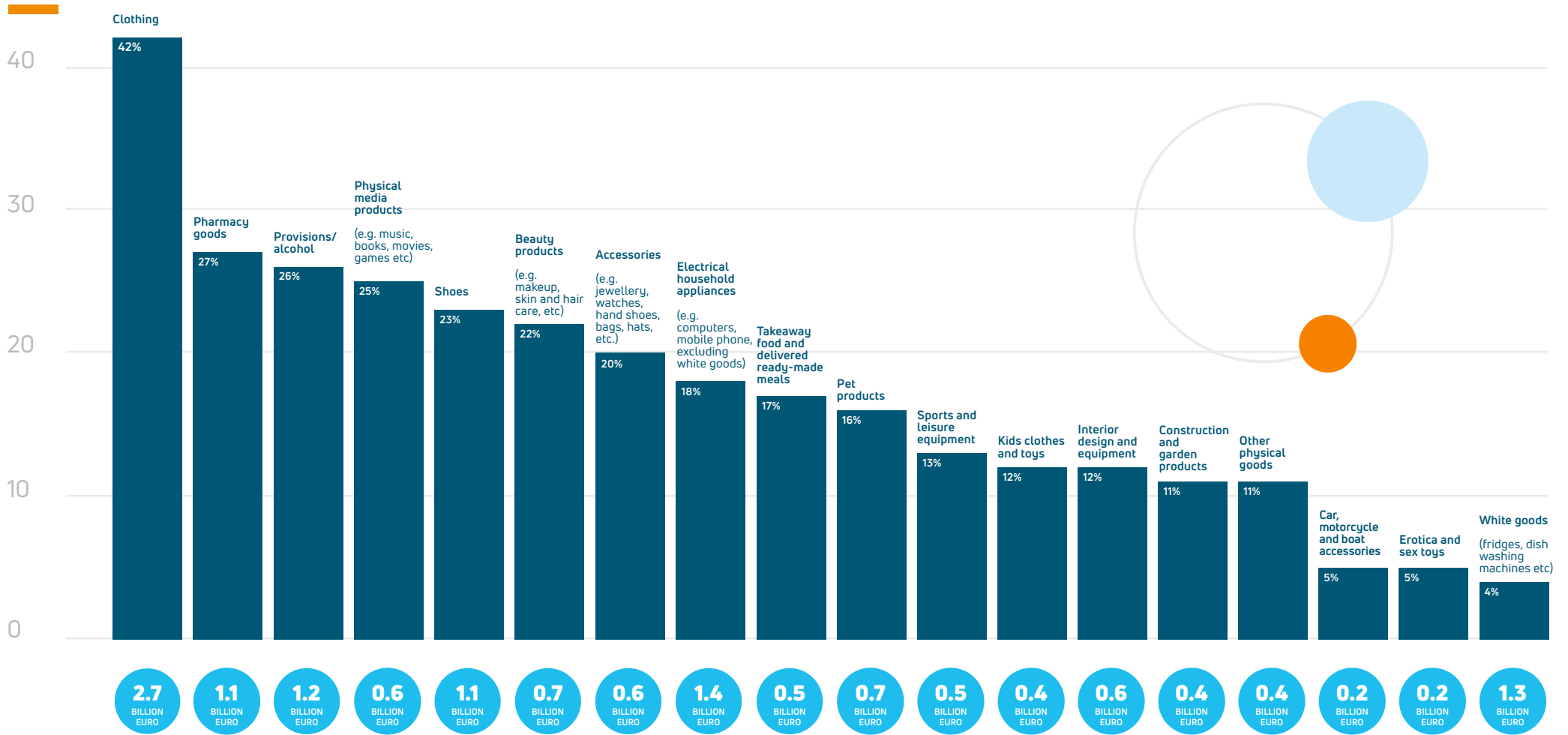
▼ -8%

Purchased goods decrease in 2021

# Goods aren't doing so good right now.

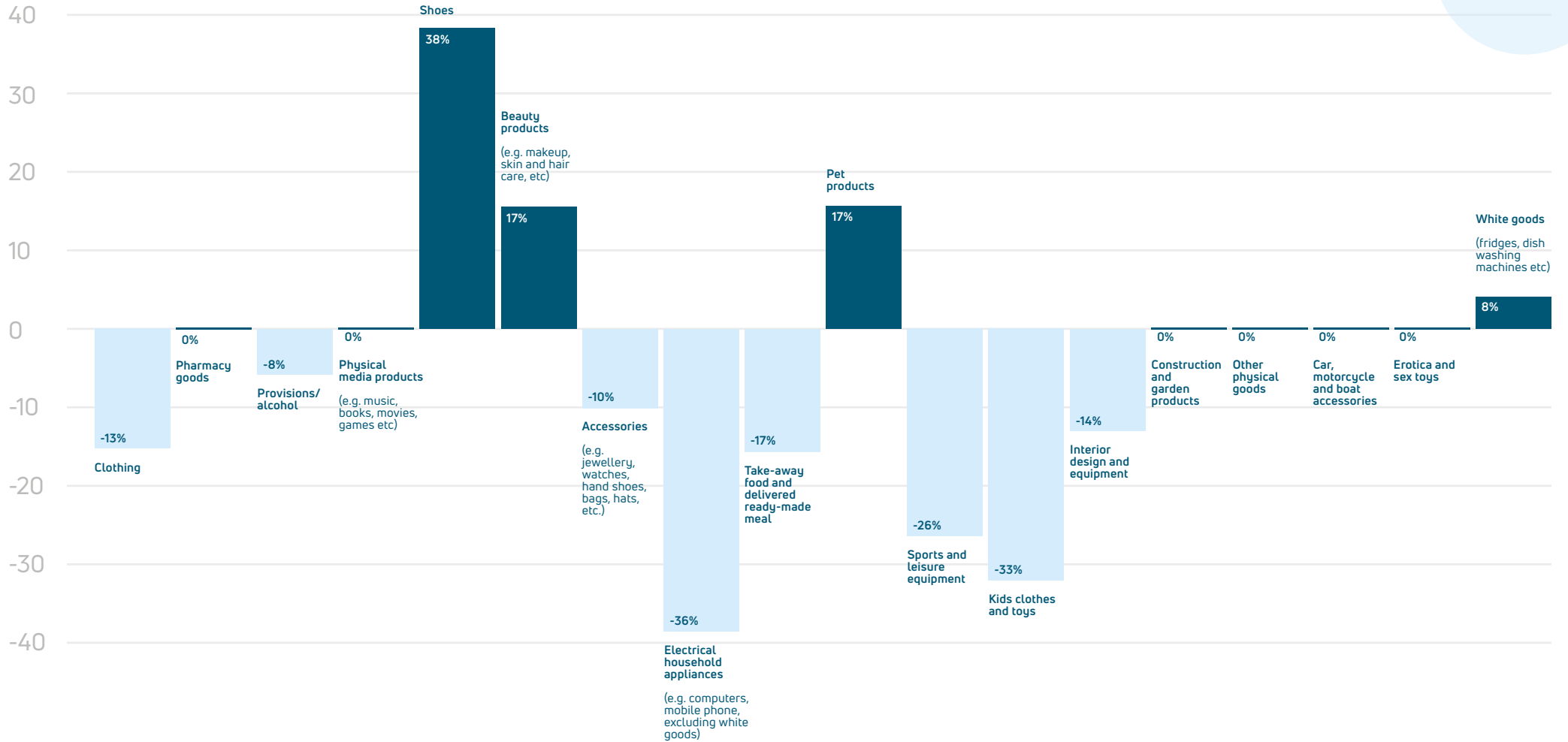
Overall, sales of goods decreased a little from 2020 during the second year of the pandemic, but behind the 8% reduction, there are both winners and losers.

Percentage of consumers who have shopped online from each category in the past 28 days / Consumer spending by category



\*These figures are estimates based on median values. They should be viewed as a comparison between categories

## Percentage change from 2020-2021 in value of industry



\*These figures are estimates based on median values. They should be viewed as a comparison between categories

## The winners



**38%**

### Shoes

And we thought Cinderella was a French story. Austrians are searching for the perfect fit, with shoe spending growing by 38% from 2020. The increased spend could be due to a return to hiking and nature following the strict lockdown measures of 2020.

**17%**

### Pet products

Your four-legged friend needs to eat too, and a lot judging by the 17% boost in online animal product purchasing made in Austria this year. With the boom of pandemic puppies and kittens, there are a lot more fur-babies to take care of following the 2020 surge of animal adoption throughout Europe.

**8%**

### White goods

Since your home is now your office, you can justify that voice-activated fridge! Austrians got the memo, with a slight increased spend of 8%. It seems Austrians are still looking at making indoor life more comfortable with more people being able to work from home.

## The losers



**-13%**

### Clothes

Fashion is no longer a passion in Austria. The clothing industry fell by 13% in 2021. We can only assume that the fashion of last year still looks good on Instagram.

**-33%**

### Children's clothes and toys

The best thing to spend on your children is time. Especially if you don't want to spend anything else on them – which is why Austrian spending on children's clothes and toys fell by 33% in 2021.

**-36%**

### Electrical household appliances

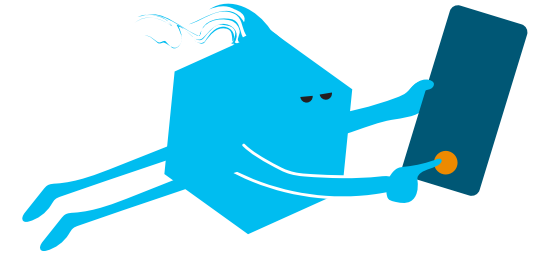
Maybe not everyone needs a bluetooth toaster - at least not in Austria. We found that eCommerce spending on home electronics dropped by 36%. A lot of people already renewed their technology in 2020 when moving to work from home, and it seems this is affecting this category quite a lot. This is the most dramatic change for eCommerce goods and may also be a reflection of the worldwide chip shortage.

## The runner-ups

Other categories with large percentage changes that indicate how we spent in 2021 are:



## Conclusion

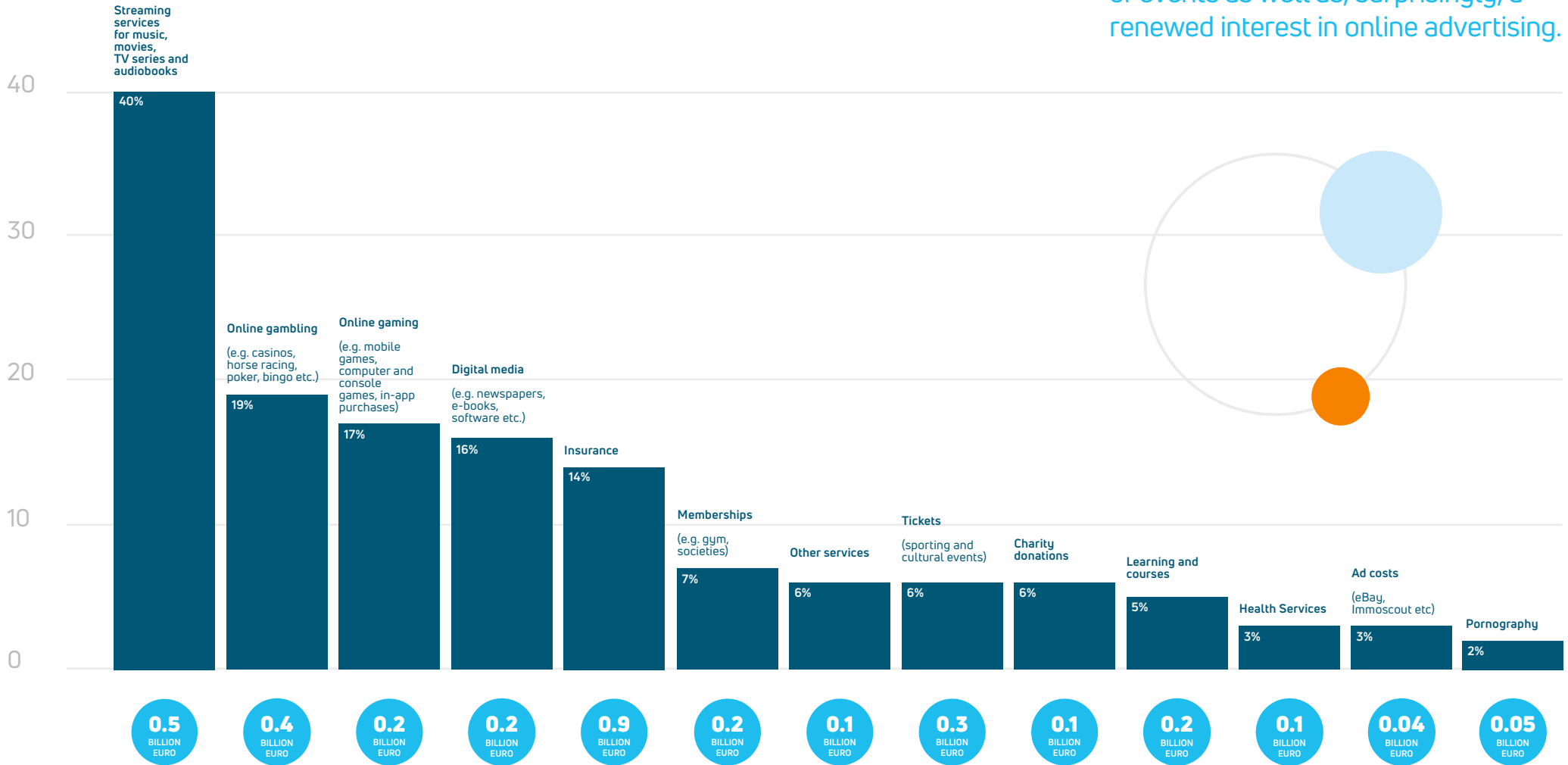


Austrians seem to be spending more cautiously than other countries. As the world slowly opens up the 8% drop in purchases is to be expected because of the exceptional growth of the previous year.

A lot of Austrian spending has been focused on maintaining hobbies and purchases made during the lockdown, like outdoor fitness and animal adoption. eCommerce shops that want to benefit from the trends of 2021 should look out for opportunities to capitalise on continuously making home life easier as well as items that may have been neglected from extended periods at home.

# eCommerce, at your service

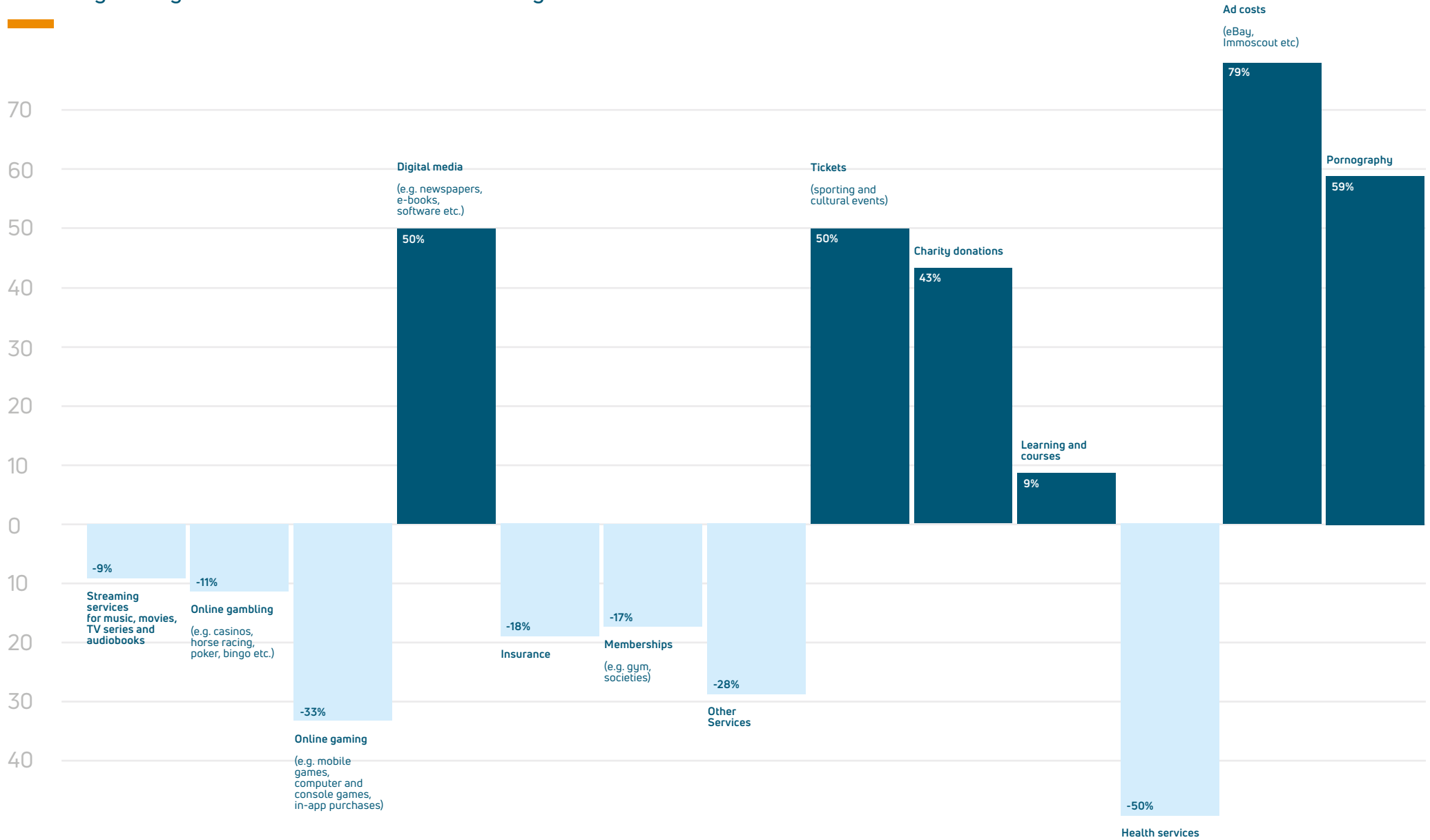
Percentage of consumers who have shopped online from each category in the past 28 days / Consumer spending by category



Sales of services via eCommerce decreased by as much as 10% in Austria from 2020. Despite the unpredictable lockdowns and protests in 2021, we saw the return of events as well as, surprisingly, a renewed interest in online advertising.

\*These figures are estimates based on median values. They should be viewed as a comparison between categories

## Percentage change from 2020-2021 in value of industry



\*These figures are estimates based on median values. They should be viewed as a comparison between categories

## The winners



**▲ 79%**

*Ad Costs (eBay, Immoscout etc)*

Now would be a good time to go looking for last year's shoes - Austrians are selling what they don't need to funnel their money into other experiences, with a 79% increase on services used for selling items like eBay and Immoscout.

**▲ 59%**

*Pornography*

Has nobody told Austria that certain websites are free, yet? With a 59% increase on pornography spending, they may just be connoisseurs.

**▲ 50%**

*Tickets - sporting and cultural events*

It would seem FOMO isn't a problem for Austrians, as they only experienced a 50% jump in ticket sales. This is surprising compared to other countries where the combination of lessened restrictions and cabin fever is fuelling ticket sales.

## The losers



**▼ -18%**

*Insurance*

With Austrians overcoming the pandemic in 2020, apparently not much scares them. Even insurance salesmen. As the biggest loser, online insurance lost 18% in the last year. The spectre of layoffs from 2020 may still linger, with insurance being the first resort for saving money. Additional reasons for this include the insurance industry peaking during the height of 2020.

**▼ -33%**

*Online gaming*

As more people return to real life, online messages are being left unread in Austria. Online gaming purchases dropped 33% as more people returned to live events.

**▼ -50%**

*Health services*

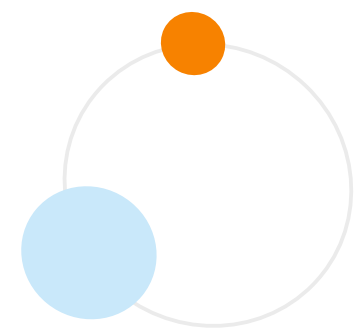
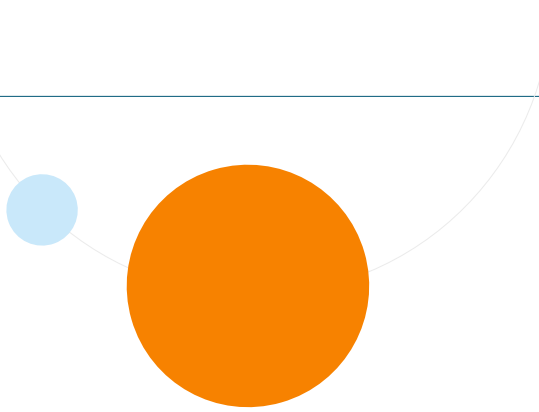
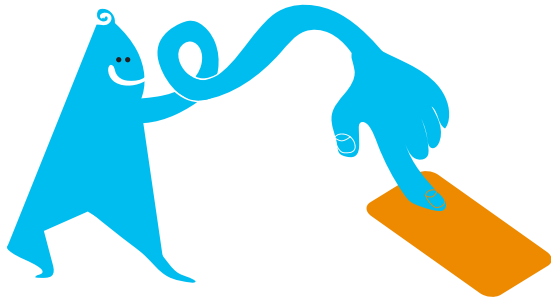
Austrians are getting a second opinion from their wallets this year. Around 50% was missing in the online health services market when compared to 2020, with half of the previous year's Austrian customers investing in private doctor appointments or online chats. All of this could be the result of no longer needing to avoid hospitals and possible Covid infection.

## The runner-ups

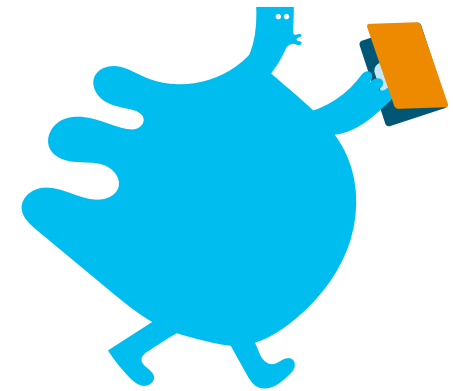
Other categories with large percentage changes that indicate how we spent in 2021 are:

 **50%**

*Digital media*



## Conclusion

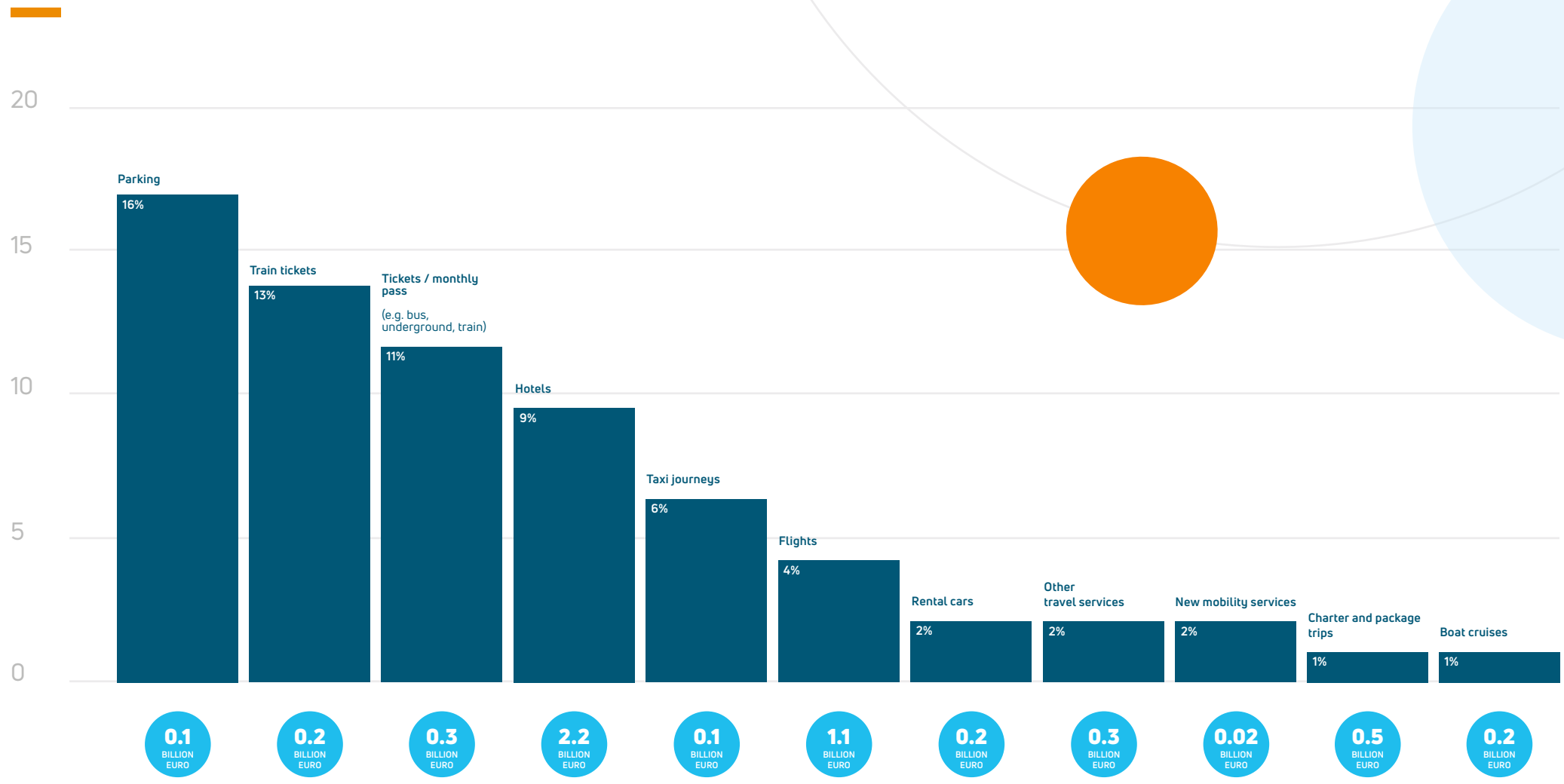


While services fell by 10% this year, not much else changed in Austria. Tickets showed disappointing growth while services that could be enjoyed at home found more substantial increases. This trend is likely indicative of Austria remaining rather cautious in the face of new Corona waves.

eCommerce shops that want to benefit from the service trends should embrace services that focus on maintaining the habits and hobbies adopted during time at home. They should also focus in on practical necessities to appeal to Austrian sensibilities.

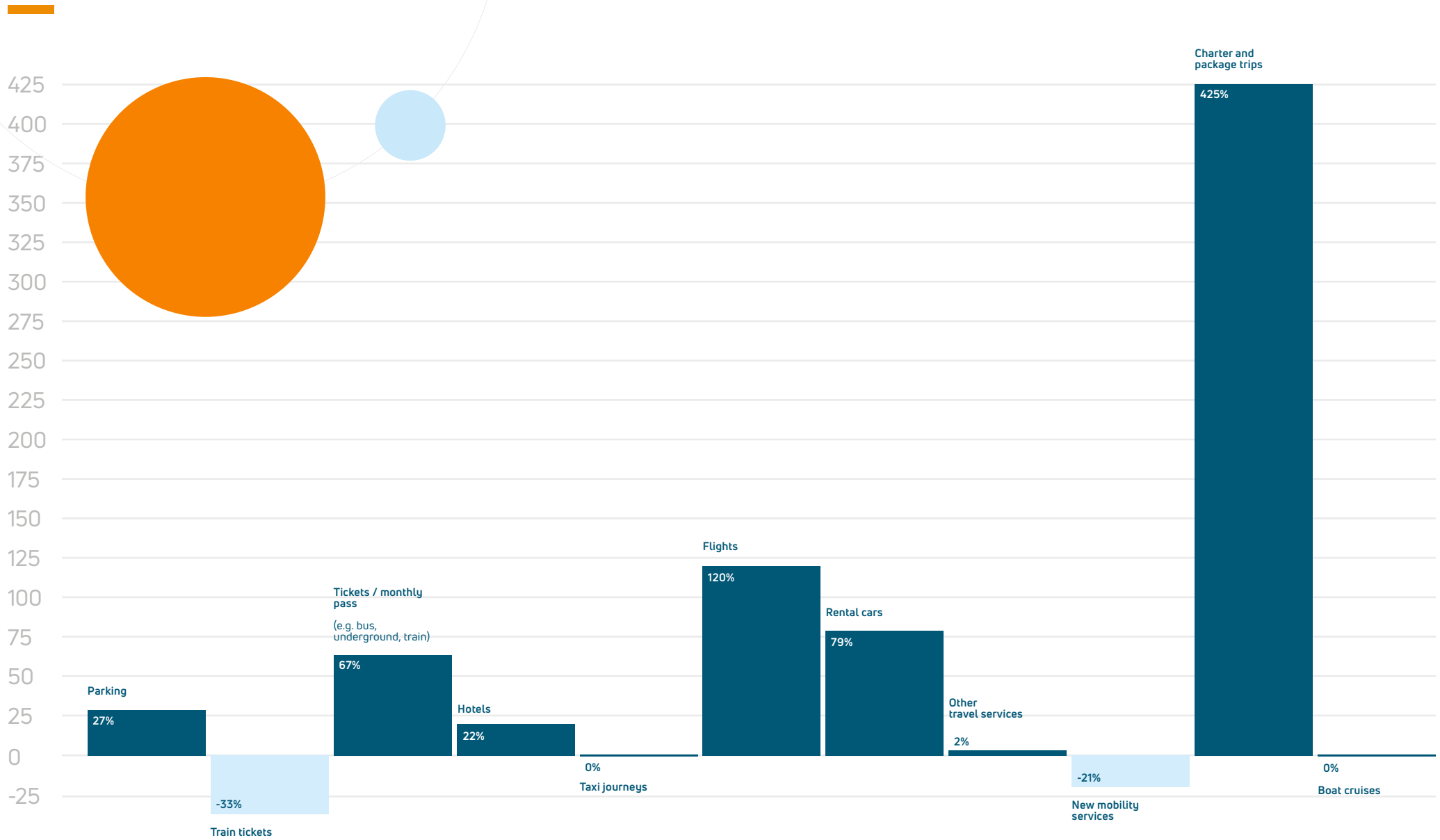
# You like to move it, move it

Percentage of consumers who have shopped online from each category in the past 28 days / Consumer spending by category



2021 was the year of the Ox according to the Chinese Zodiac - but we like to call it the year of travel. It's comeback time for the travel sector, with an increase of over 43%.

## Percentage change from 2020-2021 in value of industry



\*These figures are estimates based on median values. They should be viewed as a comparison between categories

## The winners



**▲ 425%**

### *Charter and package trips*

The largest percentage shift in the travel sector, charters and package trips grew by 425%, with the majority of bookings taking place when restrictions were lifted. This probably proves that the longing for travel is greater than the desire for the next streaming marathon.

**▲ 120%**

### *Flights*

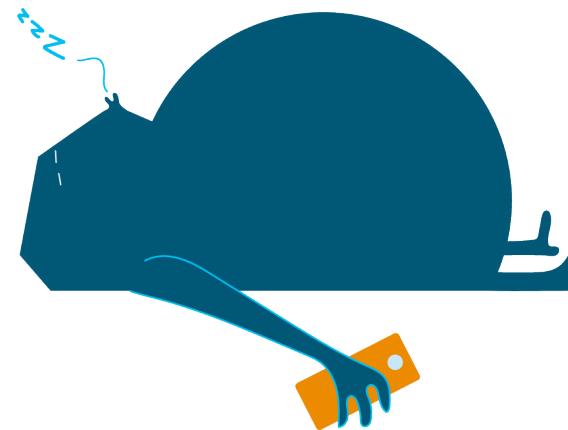
We're getting our wings back! With offers of air travel back online and countries opening their borders again, Austrians are taking full advantage. Bookings increased by 120% earning hundreds of millions more than 2020.

**▲ 79%**

### *Rental cars*

Rental cars show an increased spend of 79% from 2020. With the shortage in vehicle imports, many Austrians are taking to rentals this year. We predict a lecture from Greta Thunberg on the horizon. How dare you!

## The losers



**▶ 0%**

### *Taxi journeys*

While not exactly a loser, the taxi industry didn't win either, with no changes in taxi fares earned.

**▶ 0%**

### *Boat cruises*

Despite the scare of the Covid cruisers of last year, Austrians are still aboard with no increase or decrease to the industry. However, cruises aren't the most popular form of travel for Austrians, only earning 0.2 billion in 2020 and 2021.

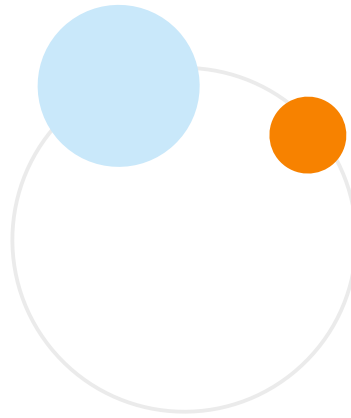
**▼ -33%**

### *Train tickets*

The only Austrian travel industry to experience any losses from 2020 was the train industry. Ticket sales decreased by 33%, with rental cars offering a cheaper and more convenient option.

## The runner-ups

Other categories with large percentage changes that indicate how we spent in 2021 are:

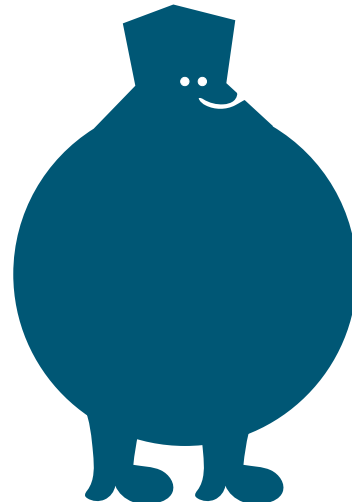


▲ **67%**

*Tickets/monthly card  
(e.g. bus, underground,  
train)*

▲ **22%**

*Hotels*



## Conclusion

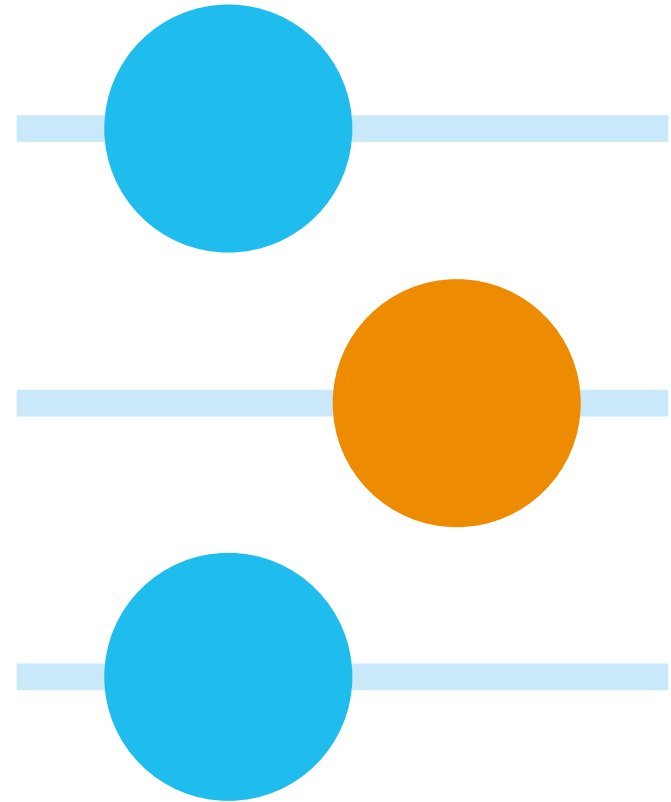


Travel is the most successful of the 2021 eCommerce categories, experiencing an overall increase of 43%. However, the travel sector is still far from the peak of 2019. We need to see roughly a doubling from the 2021 levels to get there. All industries within travel seem to be growing or stagnating, with the exception of trains. This is not exactly a great sign, as 2020 was a tough year for travel and most other countries saw increased spending for the majority of their sectors by a higher margin.

Despite this, the promising signs of growth in other industries indicate that Austrian consumers are largely ready for travel again. This should come as a relief for travel eCommerce services weary of whether Covid would have an impact on future travel decisions. Nevertheless, the increased interest in travel indicates that travel eCommerce services need not drastically change their approach, and should instead prepare for a surge of interest and customers.

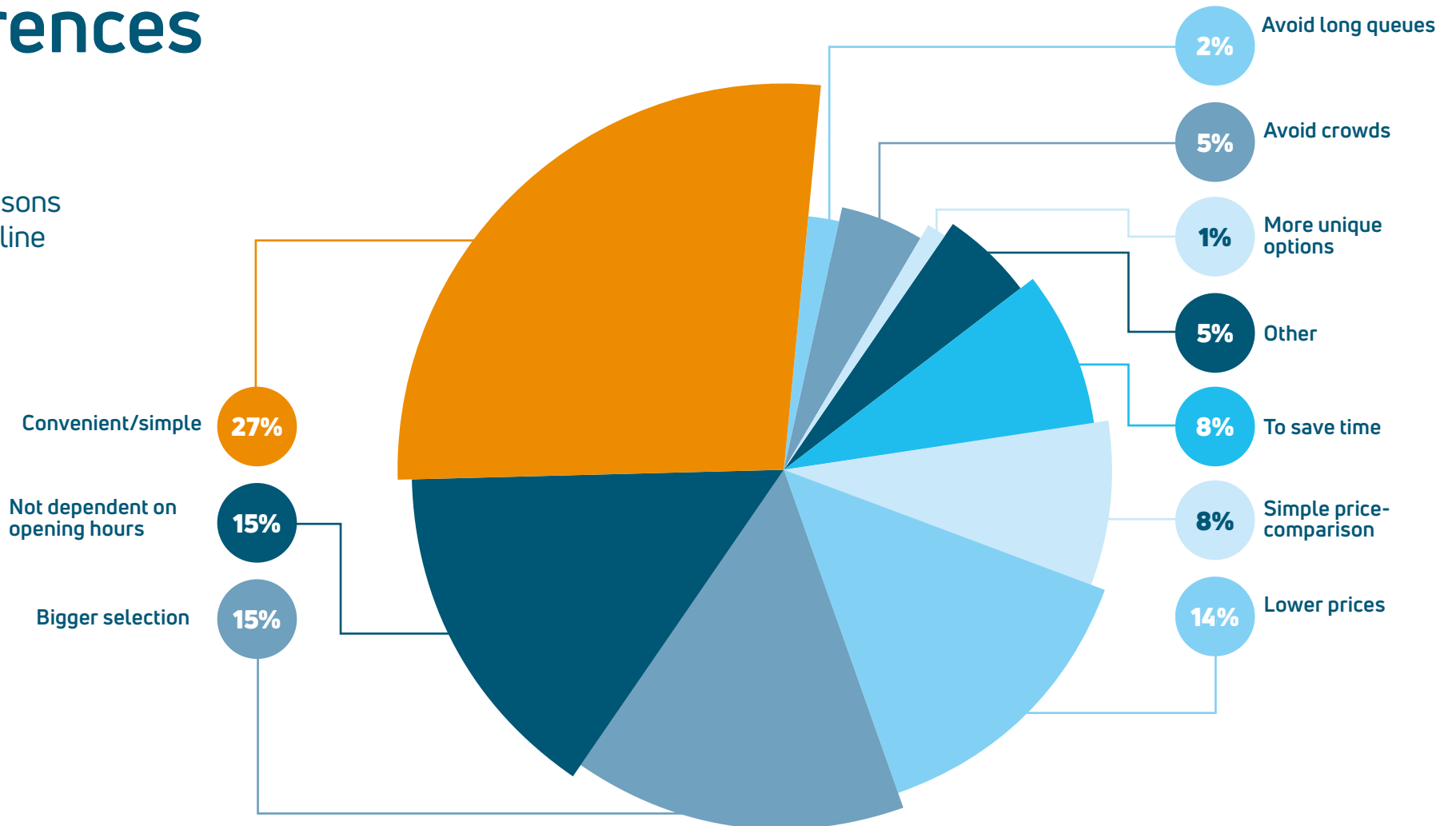
# Consumer preferences

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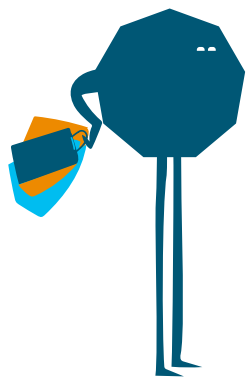
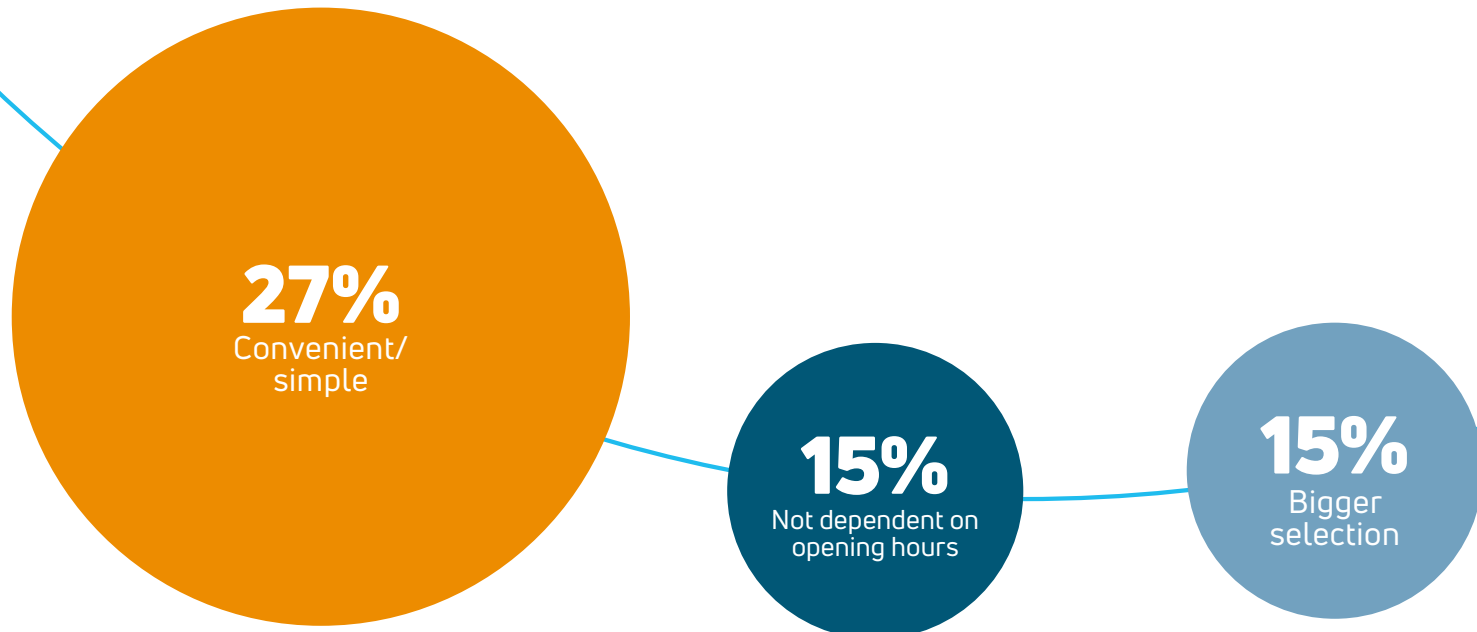


# Consumer preferences

Consumers' reasons for shopping online



## Essential preferences in eCommerce



Since the pandemic, consumers' motives for shopping online have changed dramatically. Before Covid-19, most shoppers were after lower prices - in 2019, the decision to shop online was primarily driven by the ability to save money, either by finding lower prices or the simplicity of comparing costs.

Today, we find ourselves in a different landscape. The importance of finding the best price has dropped to 14% - a minor decrease from 15% reported on before 2020. The need for lower prices is being gradually replaced by the desire for convenience, moving from 24% to 27% of respondents ranking it higher than price considerations.

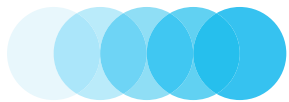
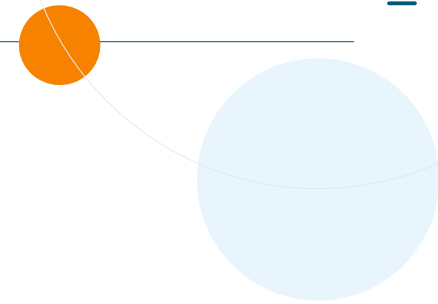
Comfort, and convenience have become the new tenants of online shopping, and the main reason people decide to decide to shop online.

All age groups agree that the main reason for shopping online is convenience, but this effect is the strongest in the 18-29 age group and weakest in the 50-64 age group. 50-79 year olds also value the non-dependence on opening hours stronger compared to the youngest group found in the 18-29 age range. However, 18-29 year-old Austrians are 2-4 times more likely to select 'save time' as main reason to shop online, presumably for more productive things like Twitter arguments. Once again, the skew in age for avoiding

crowds versus not depending on opening hours is maybe due to Covid-scare for the more mature audiences in age group 50-79.

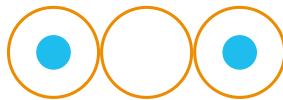
The pandemic has thus redrawn the map when it applies to the reasons for shopping online. Admittedly, some of the convenience factors have been imposed when restrictions have affected our ability to shop in physical stores, but it still seems that eCommerce has reached a more mature phase where it is not the price that is the main reason for shopping online. Instead, it is the opportunity to shop around the clock, avoid cash queues and have a more convenient experience, which are more important reasons for the Austrians.

## Top recommendations for eCommerce stores



### *Make checkout seamless*

Every step towards improving your checkout process is a step towards boosting revenue. Make it easy for your customers to spend money, and they'll spend more.



### *Use pre-populated forms*

Don't slow down the purchasing process by forcing buyers to find their credit card details.



### *Make every website visit an experience*

Focus on what your customers want and make sure that there are as few steps as possible in the process of finding and buying it. Try to remove unnecessary steps or distractions wherever possible.



### *Optimise for mobile*

Many of your customers shop via mobile devices - so don't force them to scroll in four directions. Optimise your shopping experience for mobile viewers to boost their comfort as well as your potential sales.

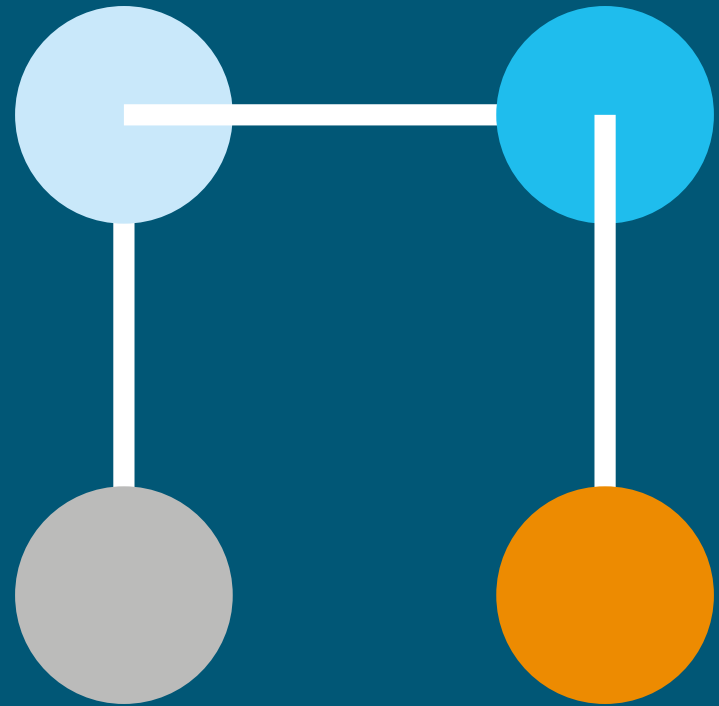


### *Make comparing simple*

The ability to compare items quickly combines the effectiveness of convenience with the practicality of finding the best deal. The easier you make this, the faster your customers will buy.

# Checkout experience

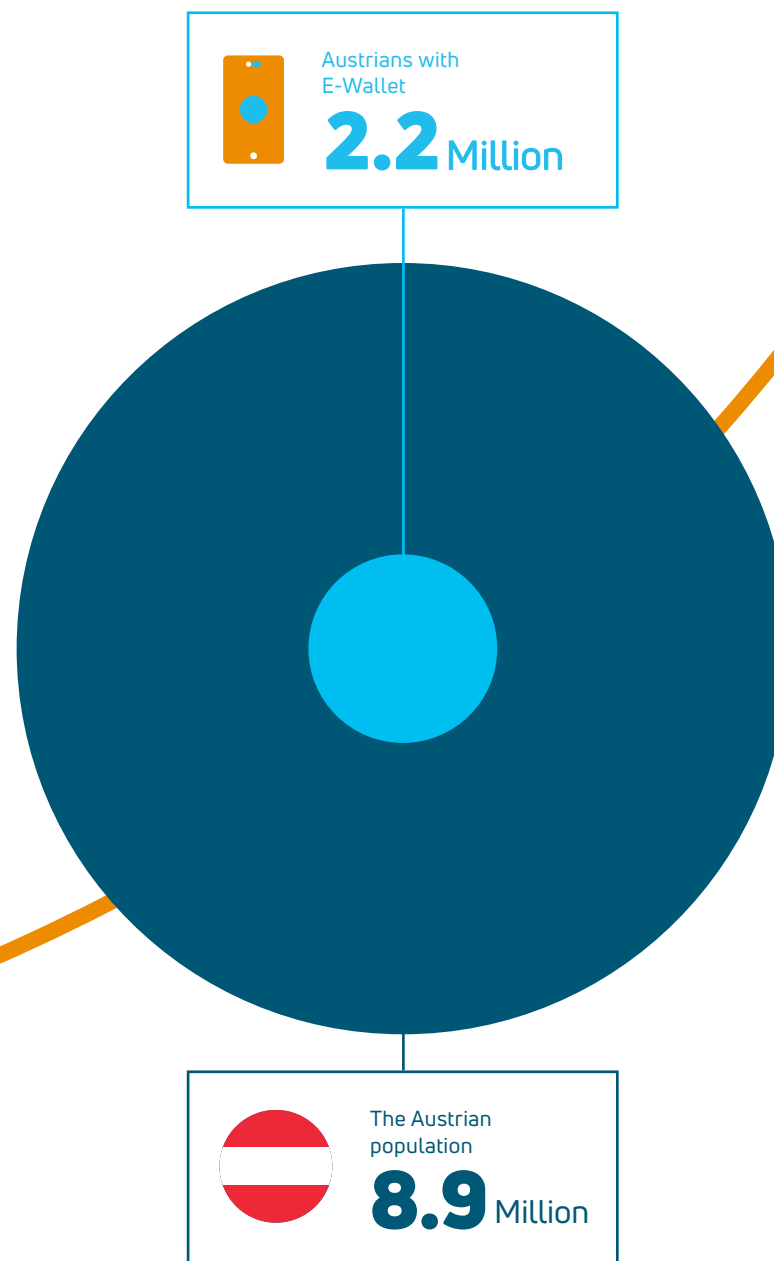
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# Consumers have a growing need for speed

The demand for fast and easy shopping experiences extends to the checkout stage of making an online purchase. While cards continue to still be popular, being the most widely used payment method, this dominance is being challenged by faster and easier methods. In fact, if the stats are to be believed, cards are only still relevant by force of habit.

E-Wallets reflect this more than any other method in Austria. They are faster, quicker and more convenient than other payment methods and are the most preferred. In terms of use, they take the third position, just behind invoicing and credit card use. However, this status quo is not expected to last as consumers gravitate towards more convenient methods of payment.



## Payments: Common currency - the most preferred payment methods of 2021

Cards continue to be the most used payment method in a trend established during the early 2000s. However, that doesn't tell the whole story. The growth statistics of alternative payment methods indicate that cards are slowly becoming less popular.



*Paying by card*

44%

Cards continue to be the most widely used payment method for Austrian consumers when shopping online. The difference between the other payment methods is decreasing.



*Invoice*

37%

Invoicing is the second most used payment method with just a slightly lower preference than paying by card. This stat is largely due to female demographics opting to use this option to return certain items like clothing.



*E-Wallets*

36%

Coming in at the third most used payment option are E-Wallets – which hold the first spot for preference. This is an important development, showing that Austrians are growing to prefer more convenient options.



*Online transfer*

33%

With a decent usage stat but an abysmal preference stat, online transfer is still relevant in practice, but not in the hearts of Austrians. This is mostly due to the process being long, complicated and slow.



*SEPA direct debit*

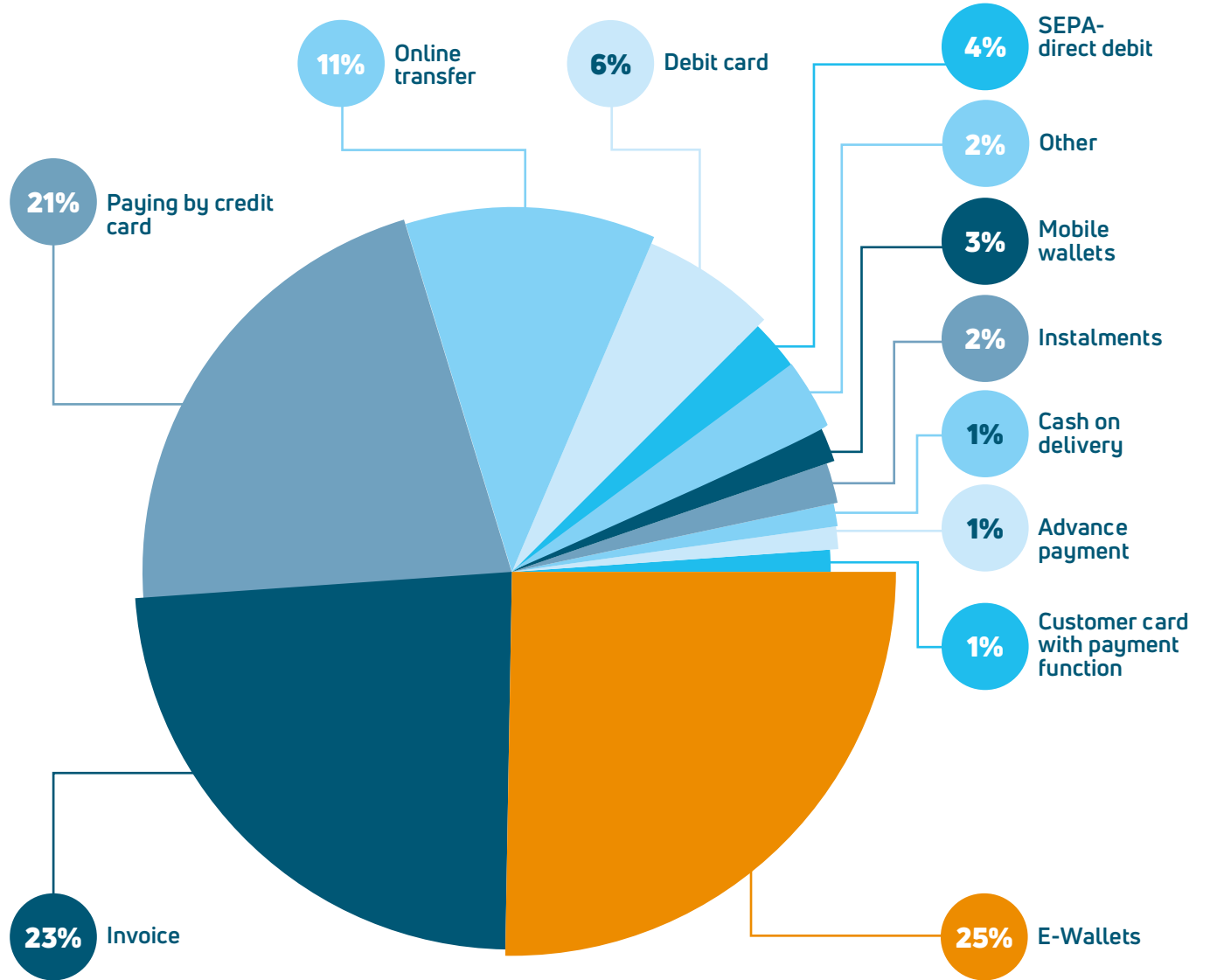
22%

Another option with an average usage stat but extremely low preference is the SEPA direct debit option. This option is mostly staying in the market due to its availability but not by demand.



## Preference at a premium - the most preferred payment methods of 2021

What people say and what they do is often very different. The available options, what resources they have on hand and what they feel is best for the purchase all contribute to which payment method people feel most comfortable with. eCommerce providers can either choose to enable options for consumers or go with a “do as they do, not as they say” approach.



# Preference at a premium - the most preferred payment methods of 2021



## E-Wallets -

*for those who like it fast and easy*

25% Preference

E-Wallets comes in first, rated the best for easy and quick payments, but quite low in terms of habitual use.



## Invoice -

*for the safe bet*

23% Preference

Invoices are the second most popular form of payment because they allow for later payment and easier returns.



## Paying by card -

*for those who take it slow and simple*

21% Preference

Cards remain in third place thanks to force of habit, security and ease of use. Many Austrians also cited the availability of the payment option as a primary driver for shopping online.



## Online transfer -

*for those who need security*

11% Preference

Online transfer represents the highest perceived security available, but scores poorly for speed and habit, making it take the second last position.



## SEPA-Lastschrift -

*for THAT guy*

4% Preference

SEPA direct debit was rated for its simplicity, but it still won't win you any points at a party, though, being one of the lowest preferred payment methods listed here.

## Paying with value - why the payment methods are valued

There are many reasons why a particular payment method is preferred by consumers. The most common are that it is easy, fast, perceived as secure, or is just a habit. But there are big differences between the payment methods.

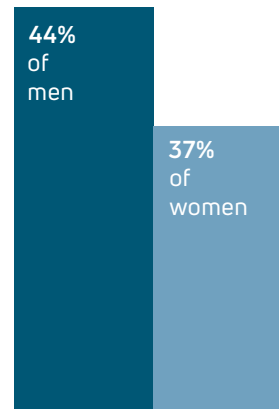
We asked respondents for the reason why they preferred a certain payment method. The overwhelming response was simplicity, speed and flexibility. Here are a few interesting stats we uncovered:

### Simplicity



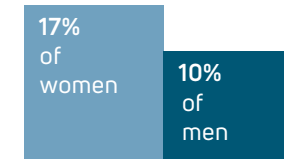
*Half of men and women prefer their particular payment method due to simplicity.*

### Speed



*Men are more likely to prioritise speed.*

### Flexibility



*Women show more propensity for the need for later invoicing*

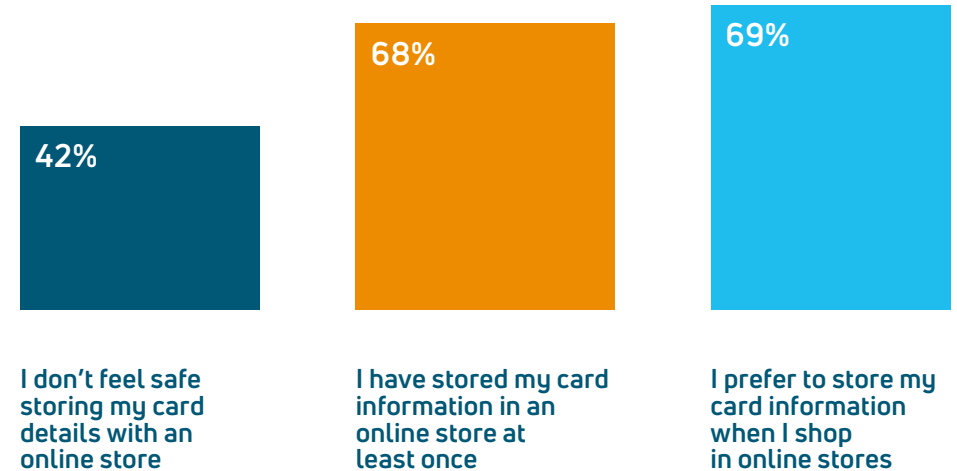
There are thus clear reasons why consumers have different behaviours when it comes to choosing payment methods. The best approach for eCommerce stores is to remain flexible, offering as many options as possible.

## Saved cards

“I’m sorry Dave,  
I’m afraid I can’t  
let you buy that”

Trusting a computer system to save your credit card details feels risky, and it’s always a little unnerving when they’re filled in before you finish typing. This sentiment is reflected in many markets we surveyed, including Austria.

## Consumer trust



When it comes to storing card data at online shops, things get more complicated. The older generations claim to a greater extent than the younger generation to only shop from sites that are up front with how they save card data. This would indicate that younger Austrian consumers feel less safe handing out card details but are more likely to shop regardless on how they are informed on how the details are saved.

This fact may indicate that convenience is becoming just as important as security for most online shoppers.

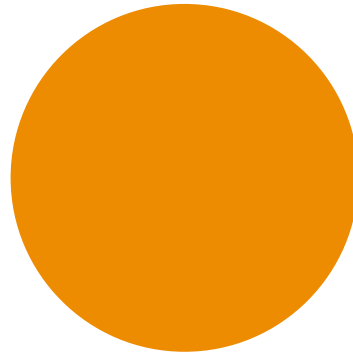
### Some other statistics we found pretty interesting included:

Females feel slightly less safe than men (39% vs 45%) when making online purchases. The majority of Austrians (55%) say they only buy from sites that inform them how their card details are managed.

## Abandoned carts: keep it simple, keep it flexible, keep it moving.

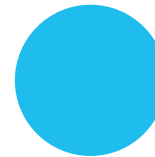
Abandoned carts are one of the saddest sights in the eCommerce world. There's just something lonely about the missed opportunity they represent. We don't want that, you don't want that and, believe it or not, most of your customers don't want that.

When we asked consumers about the last time they abandoned a cart online and their main reason for doing so, we uncovered what we think is the trinity of ensuring your carts are never left alone and abandoned again - simplicity, flexibility and service.



*Simplicity - 46%*

Shoppers who experienced complications when ordering off eCommerce websites are more likely to say 'no-deal' at the moment of shopping cart truth. 46% of respondents said they left their shopping cart abandoned due to difficulties registering personal data, understanding the process or simply being unable to make the process work. eCommerce websites should make the process as simple and seamless as possible for shoppers so that they don't have to think - they just have to buy.



*Service - 20%*

Austrians just like to have someone to talk to. If this essential element of support is lacking, it will contribute to at least 20% of your abandoned carts. eCommerce websites can address this by making service and support readily accessible and friendly throughout the entire buying process.



*Flexibility - 16%*

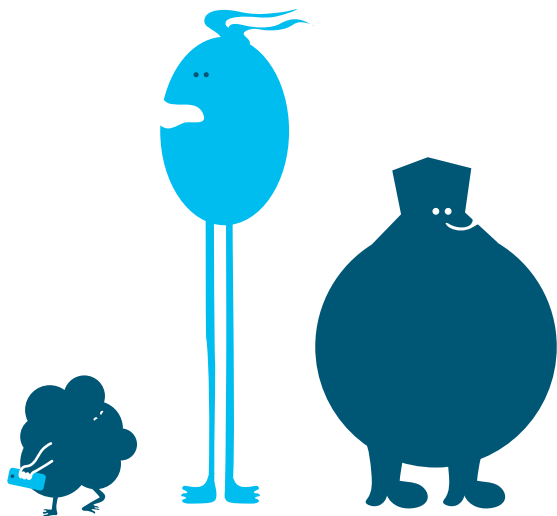
A lot of shoppers said they didn't finish the purchase because the shop was inflexible. The payment option they wanted to use was not available, the delivery options weren't there, and the shop was just being stubborn, making returns complicated. The lesson in all this? eCommerce websites need to be flexible in their approach and accept as many payment methods as possible to appeal to a variety of today's shoppers, making the entire experience as easy and adaptable as possible.

*The other reasons...*

- Customs- **15%**
- Other reason - **14%**
- Unsure of rights as a consumer - **11%**
- Environmental reasons - **10%**
- Price including shipping was too high - **10%**
- Lack of trust in the webshop - **9%**

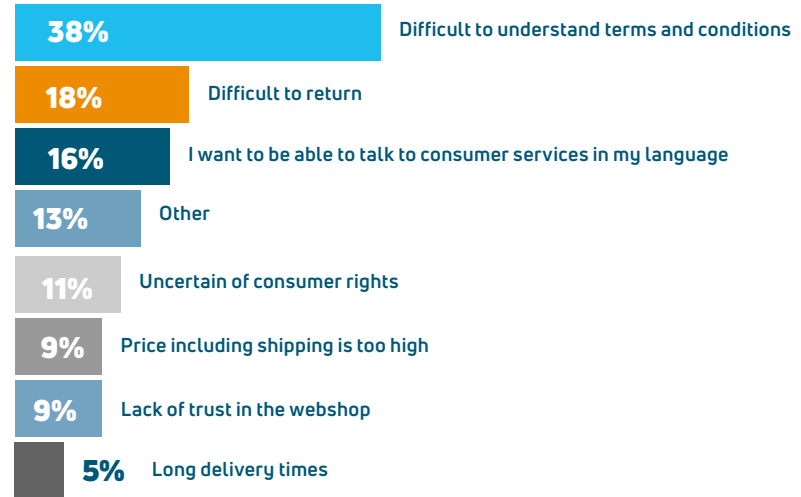
## The age of abandonment - cart abandonment by age

Different ages, different reasons. Let's see why each demographic abandons their online shopping cart.

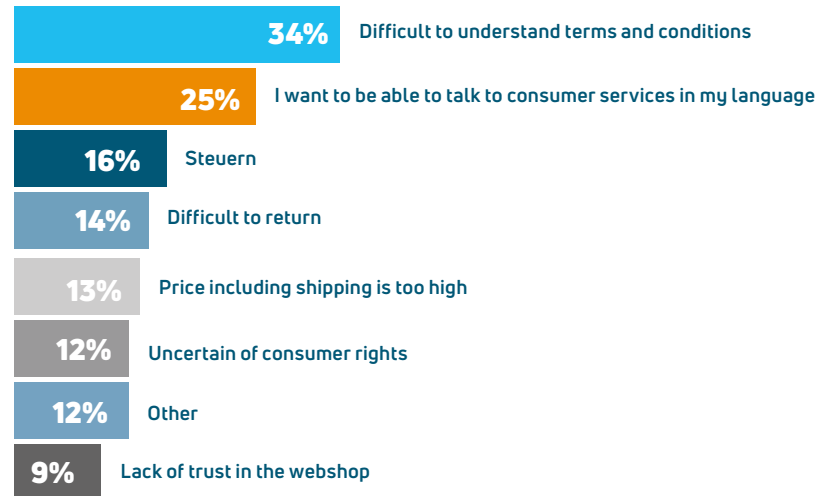


### Reasons to abandon cart

#### Women

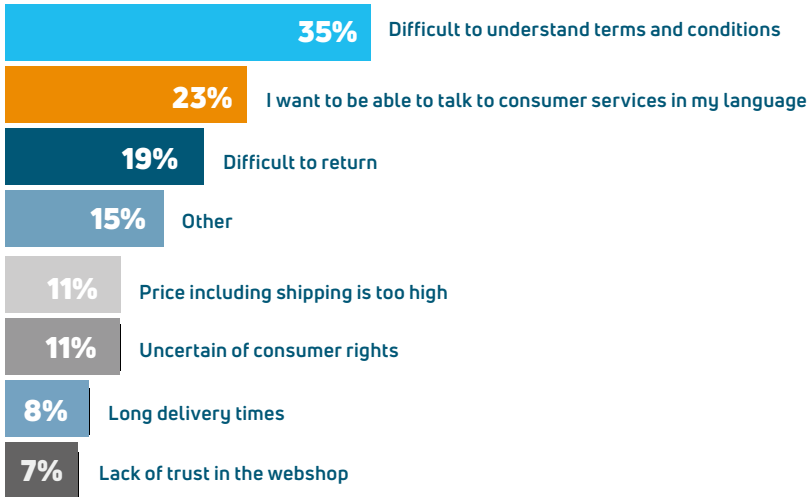


#### Men

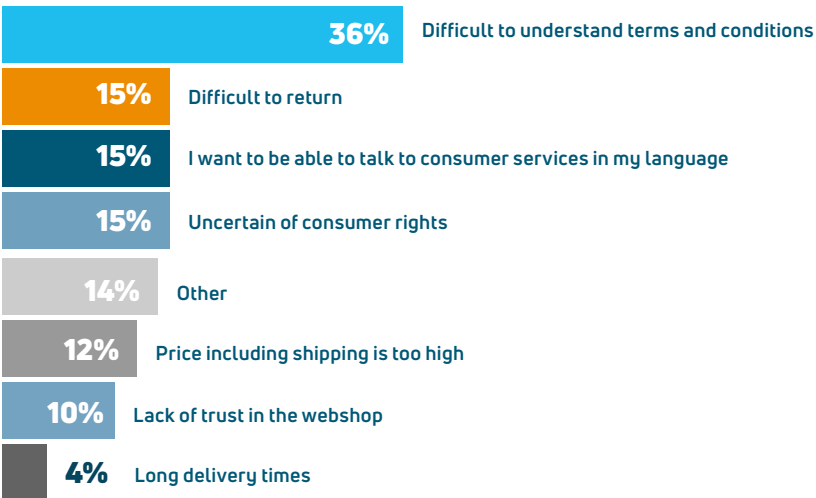


## Reasons to abandon cart

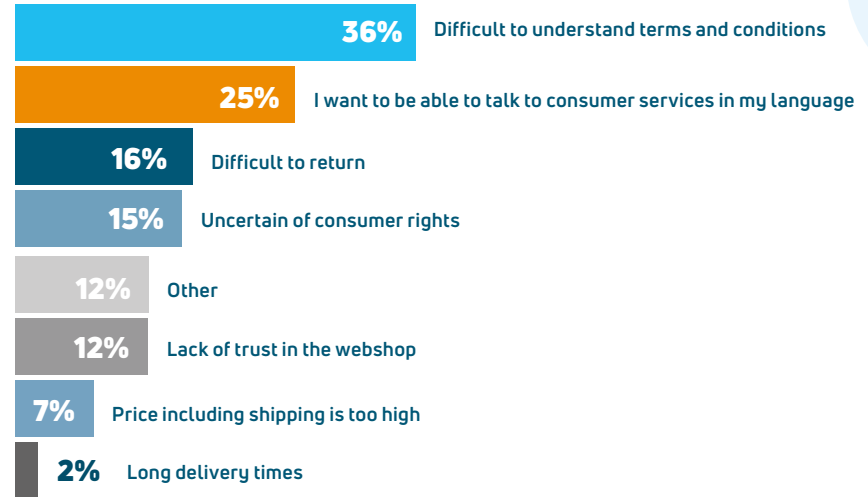
### 18–29 Age group



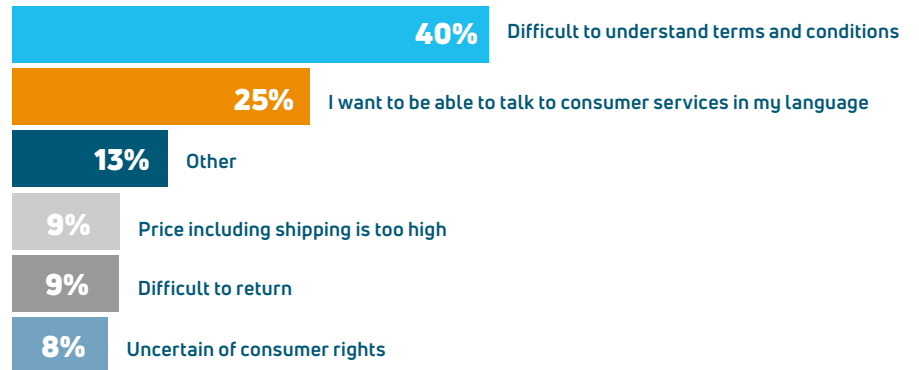
### 30–49 Age group



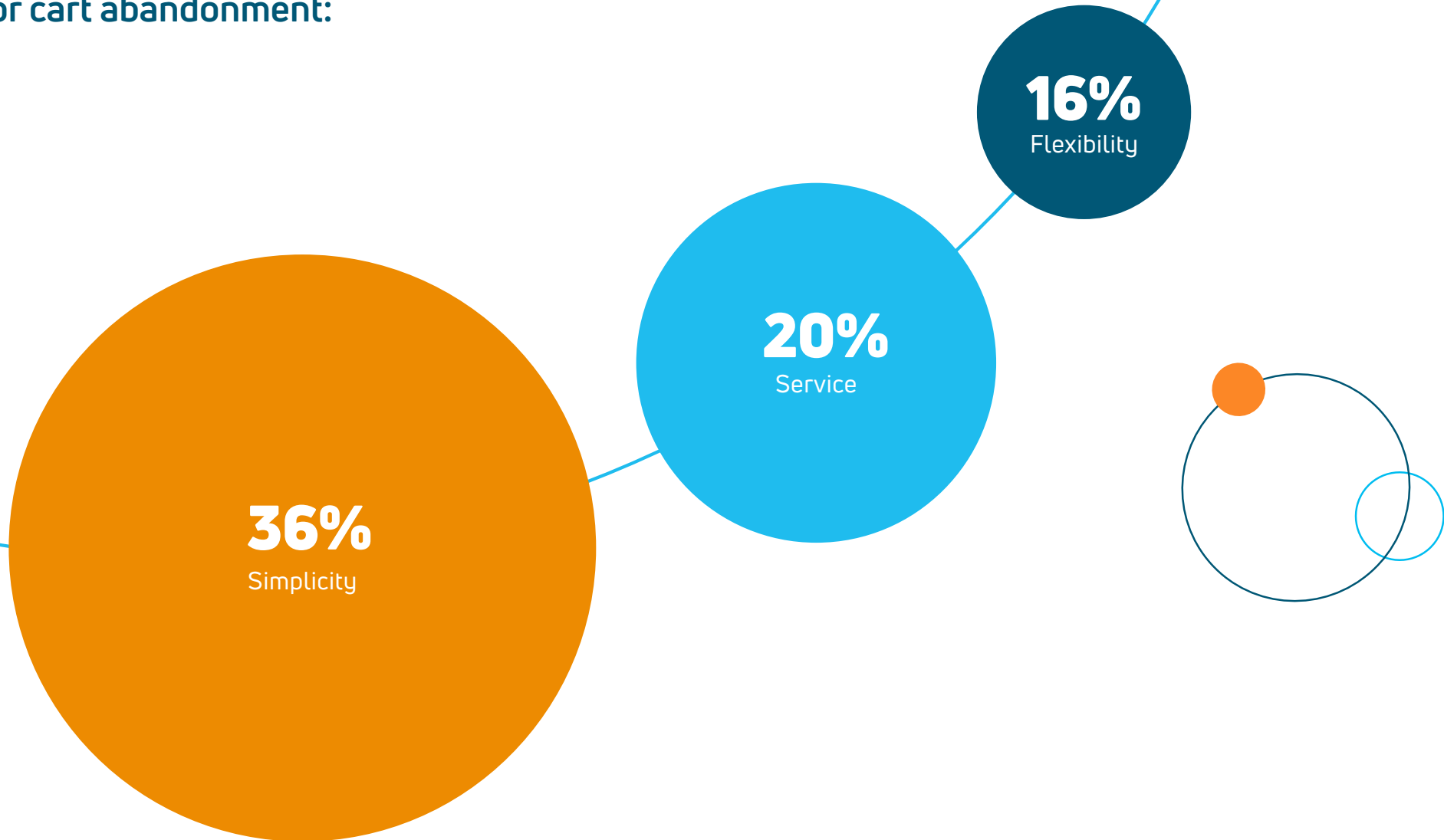
### 50–64 Age group



### 65–79 Age group

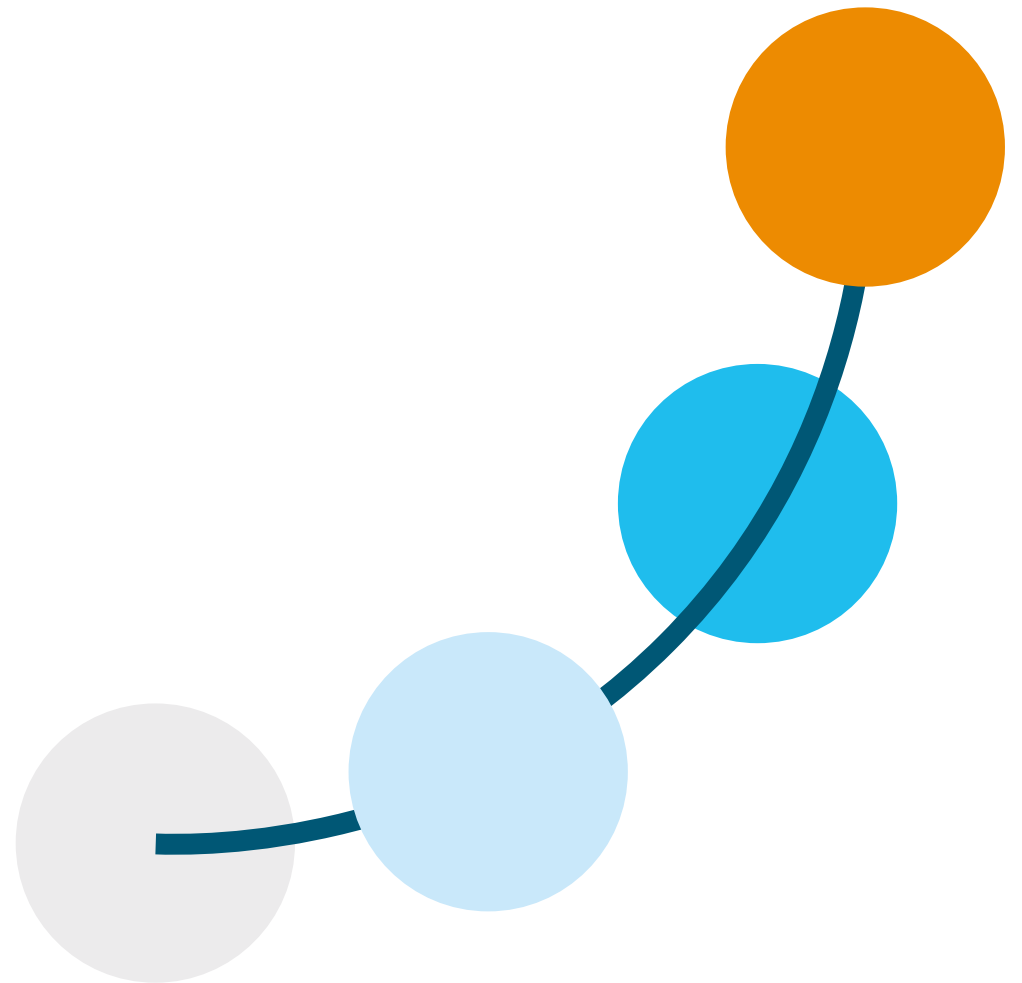


## Three primary culprits for cart abandonment:



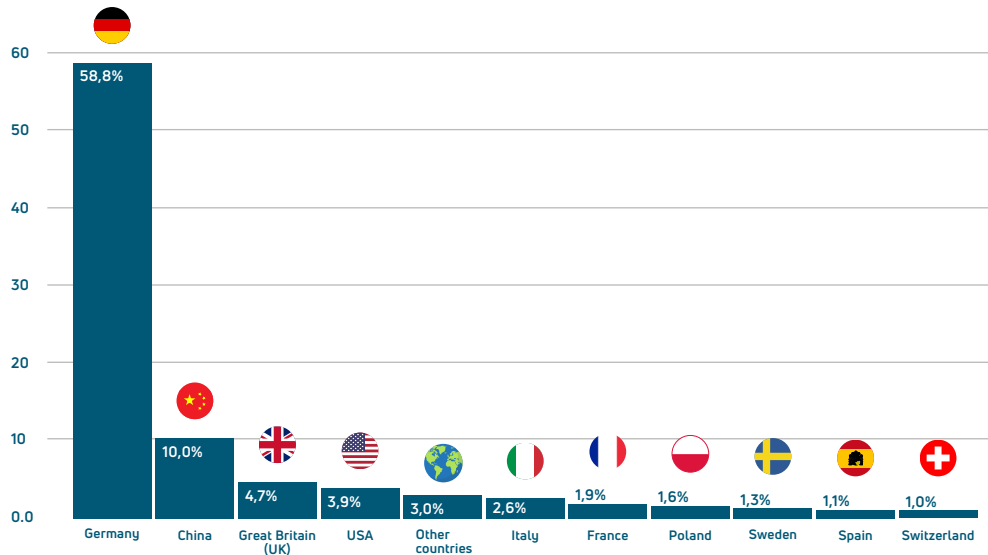
# How to grow your business

4



## There are always more fish in the sea - so stop fishing in the pond.

Percentage of consumers who have shopped from webshops in the following countries



One of the great advantages of eCommerce is the ability to access entirely new markets.

However, while this may be an opportunity for some, it's a threat for every local business. Foreign stores are continuing to snatch up Austrian shoppers for multiple reasons - but this doesn't stop you from thwarting their attempts and even encroaching on their territories. Hey - all's fair in love and eCommerce!

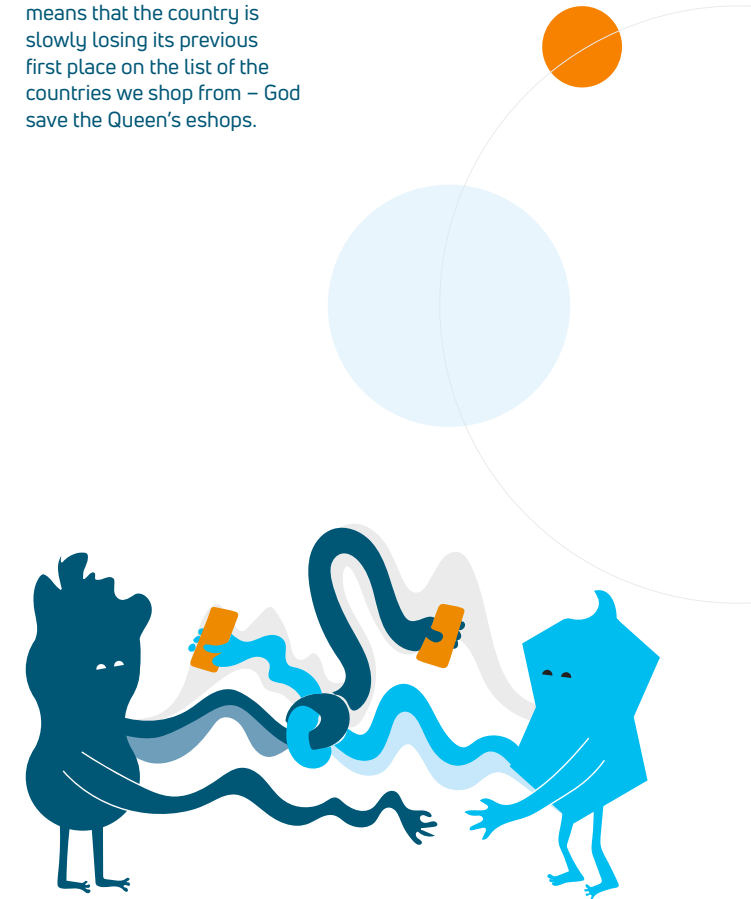
The majority of Austrians buy from Germany (even over Austria!), and then China. The main reason is due to the fact that these countries offer lower prices, have more products and faster delivery. You read that right – faster delivery. This is because Austrian webshops can take up to 10 working-days for delivery while bigger German shops are able to send out orders much faster.

## New markets abroad: international competition

Shopping abroad continues to be important for consumers in Austria. In an average month, one in two Austrians purchases something from a foreign website – the same level as last year. However, international competition will continue to be a reality for Austrian online stores as it ramps up efforts to claim more local markets. It's also worth noting that estimates of 47% of Austrians shopping internationally are likely conservative. Many consumers do not always perceive that they shop from a foreign online store because they seem to be Austrian. Good translations, local payment and delivery methods and cultural customisation can fool anyone.

Instead, it is Germany that takes first place, with stores like Zalando and Amazon.de representing the most popular options for Austrians. Brexit has led all age groups to reduce their shopping in the UK, which means that the country is slowly losing its previous first place on the list of the countries we shop from – God save the Queen's eshops.

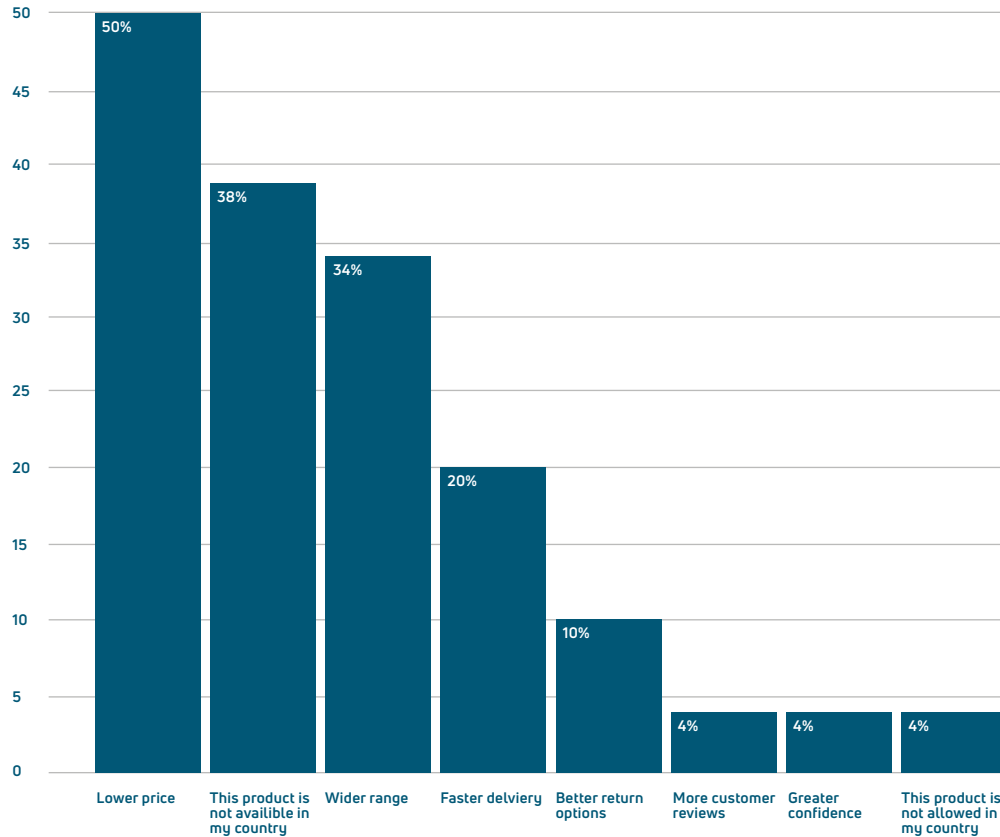
The most likely culprit of claiming Austrian online shoppers is Germany (59% vs Austria's own 49%), followed by China, and then the UK. China continues to lose popularity and now ends up in second place. Increased costs in the form of customs duties and taxes, and possibly increased environmental awareness can be the causes.



## Why consumers shop internationally

There are many barriers to shopping internationally, including a slower delivery time, higher taxes, getting less than what you bargained for. You need more than a wish to get quality. However, there are valid reasons consumers have cited to why they commit eCommerce treason.

### Reasons why Austrians shop internationally



Here are the top 3:

#### Lower price - 50%

Half of all Austrians shop abroad to save money - with men at 54% ahead of women (40%).

#### The product is not available in my country - 38%

Austrians also buy from foreign online shops because the product is not available in Austria. More than a third named this as the most important reason - especially in the age groups "18-29" and "65-79".

#### Wider range - 34%

Three out of ten Austrians say that the main reason they shop on foreign websites is due to the wider range of options they provide.

## Defending your pond - keeping local shoppers

While international competition may be taking local shoppers from your shores, that doesn't mean you have to sit and take it.

Here are a few ways local eCommerce stores can deter international competition:

### *Diversify your product offering*

Offering a diverse range of products is the number one way you can combat international interference with your market. Note the items that your target market is turning to international waters for and offer them yourself.

### *Offer a better experience*

As the previous findings have pointed out, offering a more streamlined and convenient shopping experience sways most consumers. If your experience is easier, faster, and better than that of foreign websites, you're more likely to hang on to local shoppers.

### *Play on their weaknesses*

Not even companies named after the largest rainforest in the world are flawless. The majority of overseas companies offer generic items, include risk of damage when shipping and charge a high price for delivery. You can use this to your advantage by being the opposite of this - be fast with delivery, offer unique items, and ensure your shipping is secure and cheap.



## Fishing in the sea - selling internationally

eCommerce stores have the ability to sell internationally. If you're considering this, you may want to keep the following insights in mind:

### *Differing payment habits*

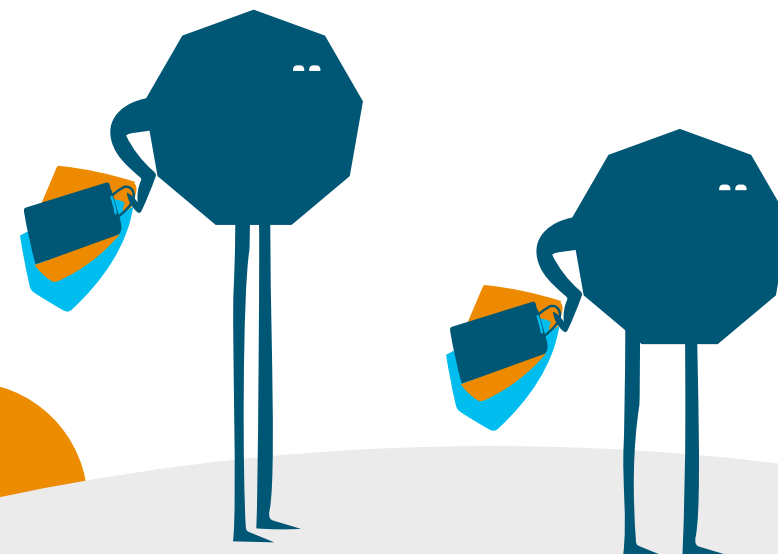
If you want to sell in other countries, you should consider that people there often use different payment methods than in Austria. We just need to turn to our neighbours to see quite dramatic differences. For example, in Denmark, cards are completely dominant, while Germans have a varied approach when using payment methods outside of E-Wallets.

### *Customised checkout*

There are also local payment methods that are important in many countries. For example, in Denmark you will find a specific kind of E-wallet, MobilePay, that is extremely popular. To avoid abandoned carts, we recommend that you customise your checkout to local conditions. It is important for your customers that you offer payment methods that they want to use.

### *Make the process feel like home*

The more comfortable and at ease you make international shoppers feel, the more likely you are to secure international sales. Good translations, local payment and delivery methods, and cultural customisation go a long way.

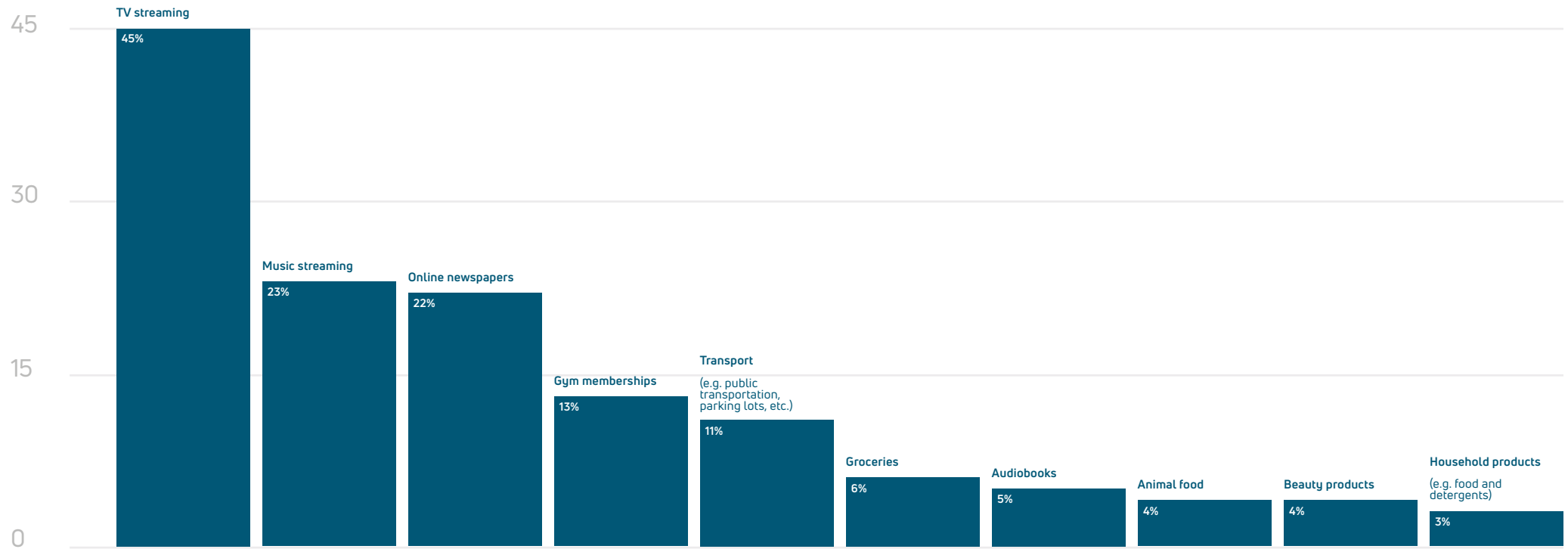


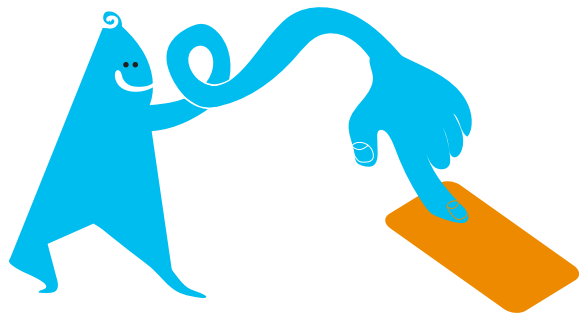
# New business models - subscriptions

## Remember to like and subscribe

Percentage of people who have registered for a subscription

TV and music streaming subscriptions are both growing in popularity across Austria. Today, almost half of Austria's population own such a subscription, but there are a few interesting new trends to note when it comes to subscriptions.





**45%**

*TV streaming*

45% of Austrians report subscribing to a TV streaming service, showing a stronger interest among men (47%) than women (43%) - but perhaps the primary reason for the growth of TV streaming in Austria is the adoption of silver surfers - those in the age group of 65-79 have come into the TV streaming scene representing 23% more viewers than 2020.

**23%**

*Music streaming*

While gaining a marginal increase of subscriptions this year, music streaming still holds a substantial market post 2020. 23% of Austrians subscribe to music streaming services with the younger generation of 18-29 holding the lead at just over 40%.

**22%**

*Online newspapers*

Subscriptions to online newspapers have slowed since last year, but are still the third largest subscription service in Austria. Around 22% of Austrians own a subscription to an online newspaper, most represented by the 65-79 year old group at 54%. The 18 to 29 year olds read the fewest paid online newspapers.

**6%**

*Groceries*

Who really has time to go to the store these days? Apparently a few Austrians don't.

**Conclusion**



Subscriptions work well for intangible products that offer broad usage. With a music streaming subscription you can listen to thousands of songs and with a TV subscription you can continuously stream new content. For irregular or limited products, we see a declining interest in other countries. Ease of access is also important: streaming services are accessible anywhere and instantly, while others require delivery.

Directly accessible, potentially unlimited value-added services as subscriptions are particularly relevant for eCommerce. However, shipping physical products on a regular basis may experience difficulties in today's market.

# Marketplaces

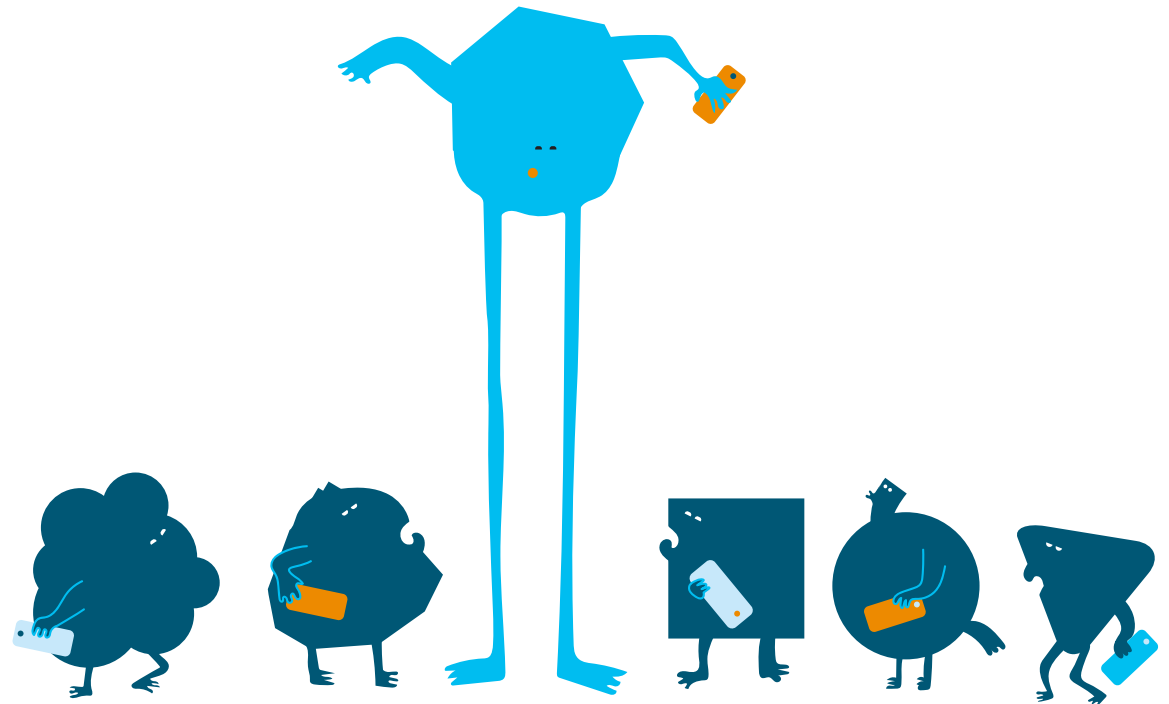
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# Nothing to go to space about.

In nearby countries like Germany, there have been eCommerce marketplaces for a long time, so Austrian consumers are relatively accustomed to the concept. The consumers who use them do so to access a wide range of products at a good price.

However, the incursion of certain international conglomerates has threatened local eCommerce stores. How has their expansion gone in Austria, and how does it affect local store owners?



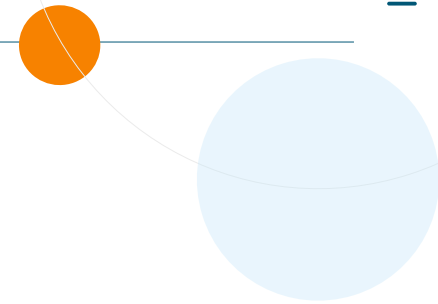
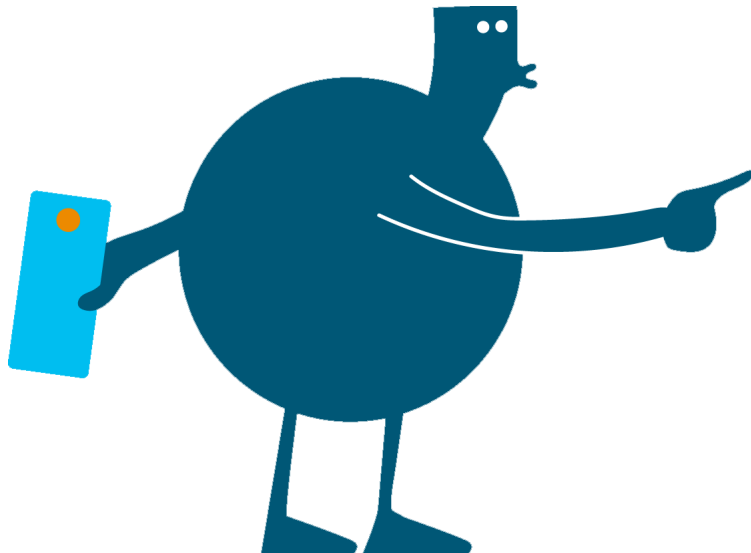
## Amazon is here to stay

Amazon has left a clear mark on Austrian consumers. 82% of Austrians say they have made at least one purchase in the last six months. Of those who shopped 95% say they will probably do it again.

Younger generations, specifically in the 18-29 age group, are the second least likely Amazon shoppers out of our respondent age groups. They are also the least likely to shop at Amazon again. We assume that younger people are tech-savvy enough to find local stores, while older generations find Amazon much easier to deal with.

For those in the 30-49 age group, 85% reported that they shopped at Amazon within the last 6 months, with the 50-64 age group close behind at 83%. They both stated that they are likely to do it again, at 96% and 98% respectively.

Here are some important insights to keep in mind:



*82% of Austrians have shopped at Amazon over the last 6 months*

Local merchants have a lot to compete for with Amazon on their doorstep. Local eCommerce stores will have to focus on quality and service if they want to regain their customers.

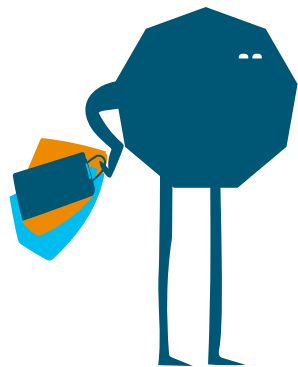
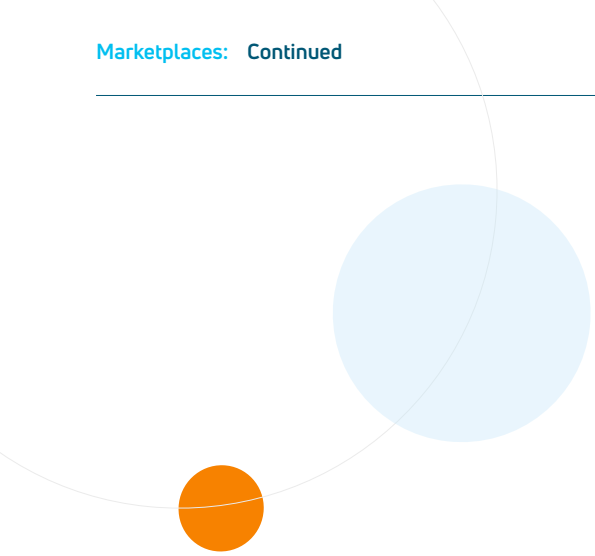
*The two biggest advantages of marketplaces are the range of products and low prices*

When shoppers did decide to shop at a marketplace, they cited the variety of products and low prices to be the best part. Most marketplaces rely upon cheap items that must be sold at high margins to cover costs. Unfortunately, Austrians are buying from Amazon in large numbers, which means that local eCommerce stores will have to find other ways to appeal to consumers. A focus on products that can't be rapidly produced with personalised service may be the answer.

*The primary issues shoppers have against marketplaces are questionable quality and lack of direct contact.*

Quality is important to Austrians - and they want someone to talk to if something doesn't add up. Concerns over quality were followed by the lack of a single point of contact for all groups except the 18-29 year old group who cited ethical concerns. Maybe the future isn't so bleak after all!

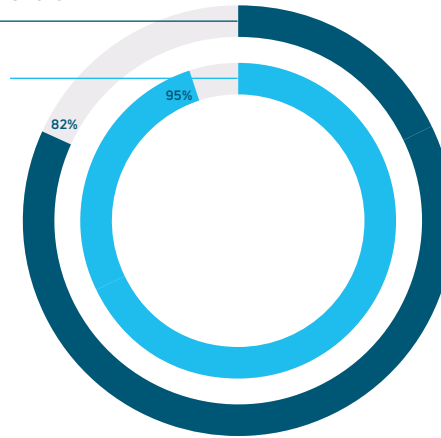
Local eCommerce stores can capitalise on these elements, providing personalised service and quality products to keep their customers away from marketplaces. In order to capture the younger generation, sustainable packaging, charity to worthy causes, and paying workers more than a plate of wood chips would go a long way.



## Amazon

We asked all Austrian interviewees whether they had bought something from Amazon in the last 6 months - 82% said yes

95% of these customers would buy again from Amazon

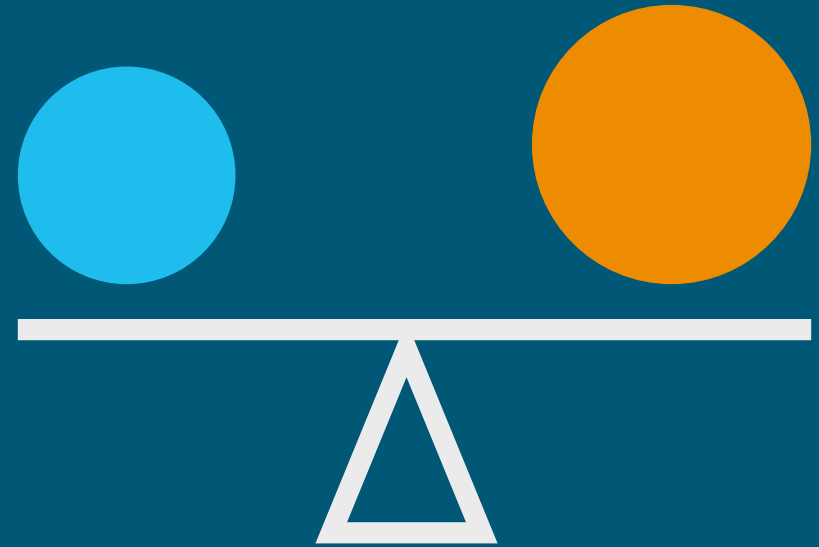


## Online Marketplaces

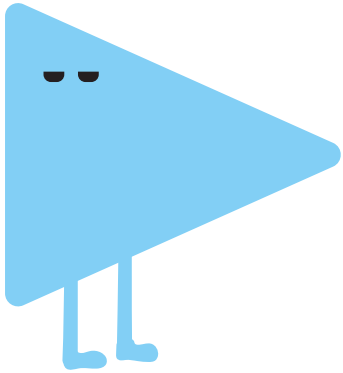


# Conclusion

6



# Overcome the uncertainty



There will be a lot of work ahead for Austrian eCommerce stores that want to reach their local customers. Challenges from international competition as well as local buying habits make operating within the region require a slow and steady approach. Even ticket sales and travel, which made an explosive come back in other regions, performed disappointingly in Austria.

Despite this, the potential to find success online in Austria is not a completely unrealistic objective. By offering customers the experiences they want and the trust they need to feel comfortable, eCommerce stores can retain customers and encourage new ones. The competition from foreign marketplaces may be fierce in the region, but leaves a lot of room for improvement that local stores can capitalise on.

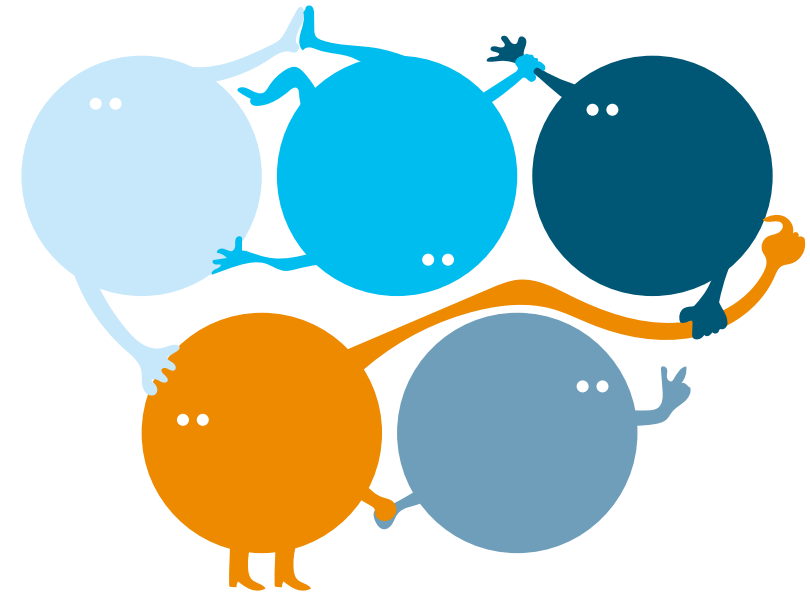
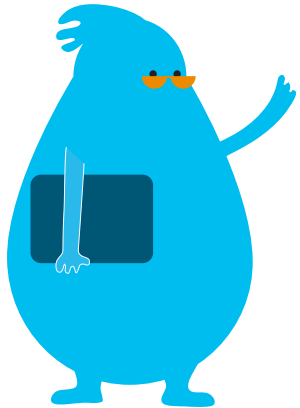
This year's Austrian eCommerce performance reflected a society unsure of their stability and future. It showed more of the same buying preference and habits as demonstrated from the height of the pandemic from 2020. With the world in such an uncertain place at the moment, not many can blame them. It remains to be seen how long this uncertainty will remain or how long Austrian buying will be affected, but it does seem that reliable, practical items will always be popular throughout Austria.

The insights in this year's report will go a long way to assist eCommerce stores that want to find success in this region. However, it's not enough to just know. Knowledge without action is like a bicycle without wheels or trying to sell NFTs on a first date. It's not going to work. You need to do something with it and play it forward. If you're an eCommerce provider, see how the insights in this report apply to you and get in touch with an expert for advice - and wouldn't you know it, we're just the people to talk to!

Contact us today, and let's get to work on your online success, together.



# About Nets Easy



## Let customers pay as they please

You lose out on customers every time you don't let them pay the way they want to.

Nets Easy offers your customers the most popular local payment methods - including card, invoice, instalment payment and E-Wallets.

## Welcome all shoppers

You probably already have followers from other countries on social media - now it's time to turn them into customers!

Nets Easy offers currencies and payment methods that customers know.

## Give customers a safe payment experience

Strange pop-up windows and pages? Changes in appearance? There are many small things that make customers nervous.

Nets Easy checkout solutions blend in with your page and can be completely adapted to your brand profile.

## Simplify the purchase price

Customers expect you to recognise them the next time they visit your website.

Nets Easy remembers your customers' payment and personal information to make it easy for customers to shop from you again.

## Become the obvious choice

With Nets Easy you can offer membership and subscription options so you don't have to hunt sales and can focus on the customer experience.

## Offer maximum flexibility

Sometimes, your customers need a product directly, but want to pay only after delivery.

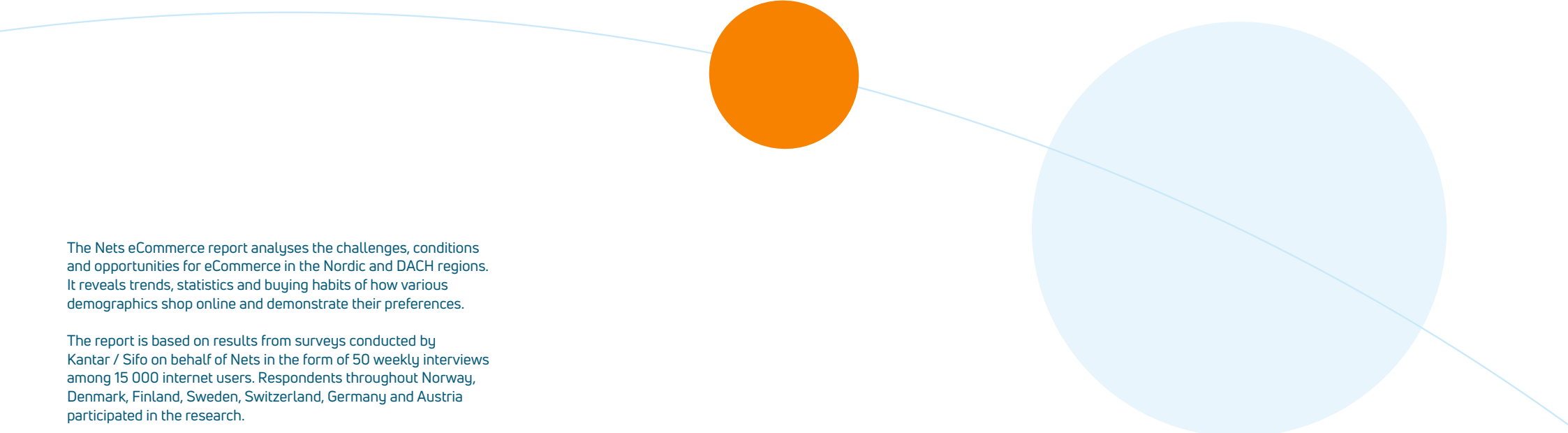
Nets Easy has integrated options for invoicing and "buy now - pay later" options, which mean more customers feel confident to make a purchase.

## Sell on all channels

Every channel should be used to encourage your customers to complete their purchase.

With Nets Easy Paylink you can text and email links to your customers to complete their purchase.

## Methodology



The Nets eCommerce report analyses the challenges, conditions and opportunities for eCommerce in the Nordic and DACH regions. It reveals trends, statistics and buying habits of how various demographics shop online and demonstrate their preferences.

The report is based on results from surveys conducted by Kantar / Sifo on behalf of Nets in the form of 50 weekly interviews among 15 000 internet users. Respondents throughout Norway, Denmark, Finland, Sweden, Switzerland, Germany and Austria participated in the research.

Estimates of total online consumption are based on the median value times the number of people shopping online in each category. The advantage of this method is that the median is less sensitive to extreme fluctuations as to provide a more accurate picture of typical consumer behaviour.

Respondents were taken from each region's local population, in the age group of 18 -79 year-olds who have internet access. These respondents were compared to the same age groups based on data taken from internetworldstats.com from June 2021. Each response was weighted by age, gender and region, and takes into account accumulated composition. Habits of each user were based on their activity over the previous 28 days.

The data contained in this report cannot be directly compared with data collected using another method.



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