

Big Online Shopping Survey 2021

Estonia

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How was the Big Online Shopping Survey carried out?

- The design of the survey and questionnaire were prepared in cooperation with Kantar TNS.
- The survey was carried out by Kantar TNS.
- The target group of the survey was those aged 18–79.
- The survey was conducted in Finland, the Baltic countries and Sweden.
 - Finland 2,093 respondents
 - Estonia 516 respondents
 - Latvia 564 respondents
 - Lithuania 513 respondents
 - Sweden 1,231 respondents
- The data was collected with a web questionnaire on June 3–14, 2021
- The survey's statistical margin of error on total-level is +/- 4,4 percentage points at most for the Baltic countries.

Background groups used in the reporting

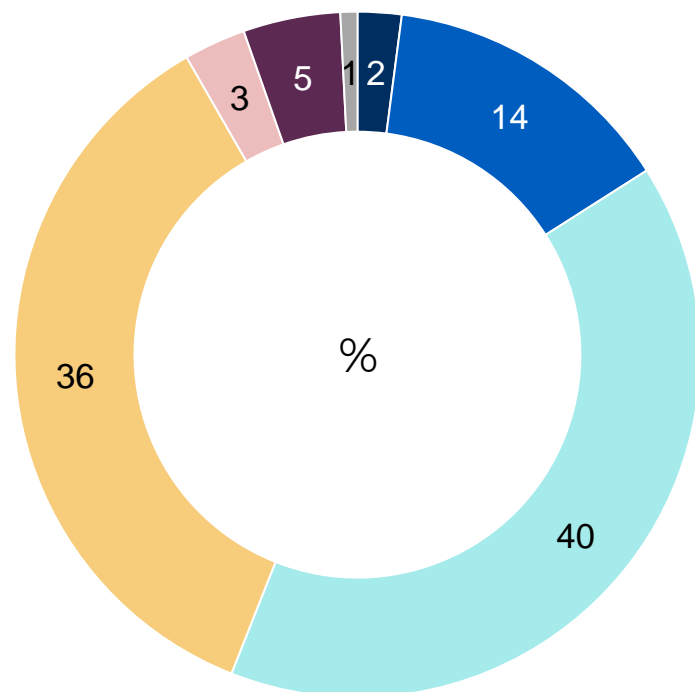


This report presents all results at total level as well as in selected backgrounds. A comparison with previous years, as well as other markets are made whenever the questioning enables it. In addition to gender and age, the results are presented through an online shopping profile:

- 1) Own approach to online shopping and web stores reveals how the respondent sees him/herself compared to others.
 - **Forerunners or active online shoppers** characterizes themselves as: "I am a forerunner, I look forward to the new possibilities of e-commerce" or "I am active, I shop a lot online and I intend to use online shops more and more in future"
 - **Standard online shoppers** characterizes themselves as: "I am a standard user, shopping online is easy for me"
 - Occasional or cautious online shoppers characterizes themselves as: "I shop online occasionally, I prefer to shop elsewhere" or "I am willing to try it, I am not very familiar with online shops"
 - **Sceptics or non-buyers** characterizes themselves as: "I am a sceptic, I don't shop online"
- 2) Own consumption habits at this moment: On a ten-point scale, an estimate of whether currently buying all purchases from brick-and-mortar (1), from online stores (10), or something in between.
 - **Currently strong emphasis on physical stores:** Strong emphasis on brick-and-mortar, answered 1-3.
 - **In between:** Located as a buyer between the two groups, answered 4-5.
 - **Currently emphasis on online stores:** Strong emphasis on online stores, answered 6-10.
- 3) Estimate what own consumption habits will be in 2025: On a ten-point scale, an estimate of whether will be buying all purchases from brick-and-mortar (1), from online stores (10), or something in between.
 - **In 2025 strong emphasis on physical stores:** Strong emphasis on brick-and-mortar, answered 1-3.
 - **In between:** Located as a buyer between the two groups, answered 4-5.
 - **In 2025 emphasis on online stores:** Strong emphasis on online stores, answered 6-10.

Online shopping behaviour

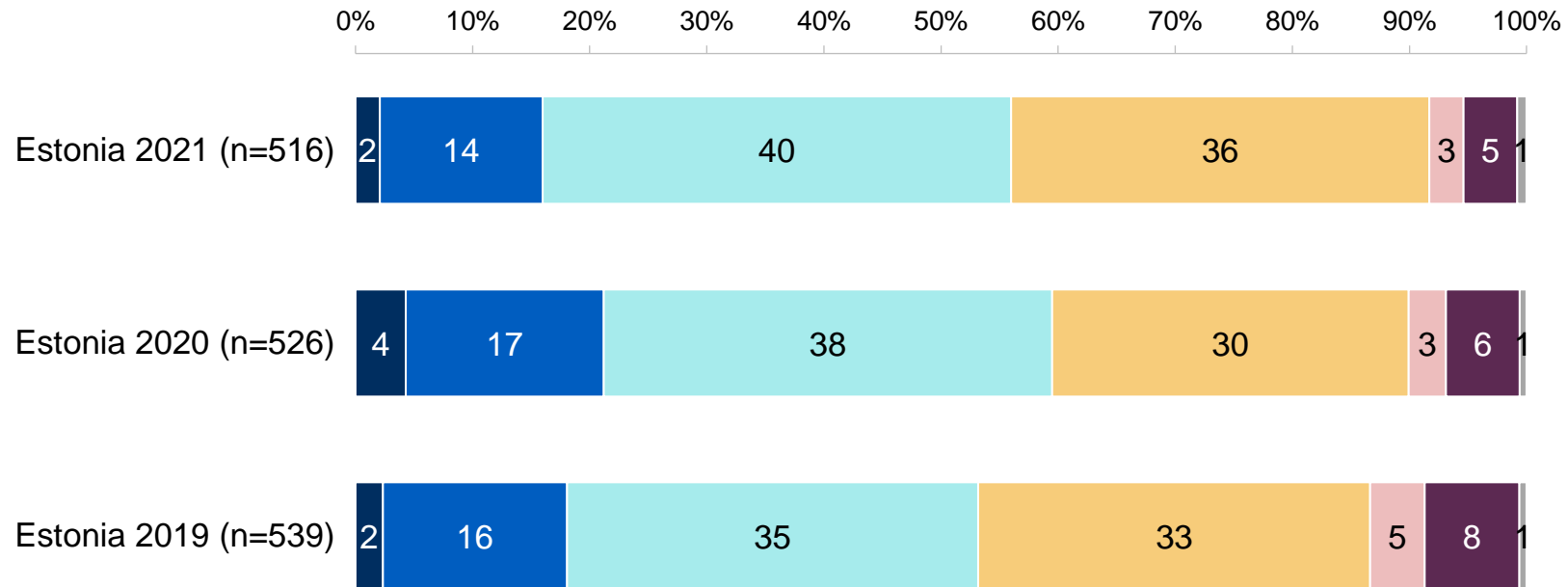
Which of the following statements best describe your approach to online shopping and online shops?



- I am a forerunner, I look forward to the new possibilities of e-commerce
- I am active, I shop a lot online and I intend to use online shops more and more in future
- I am a standard user, shopping online is easy for me
- I shop online occasionally, I prefer to shop elsewhere
- I am willing to try it, I am not very familiar with online shops
- I am a sceptic, I don't shop online
- I don't know

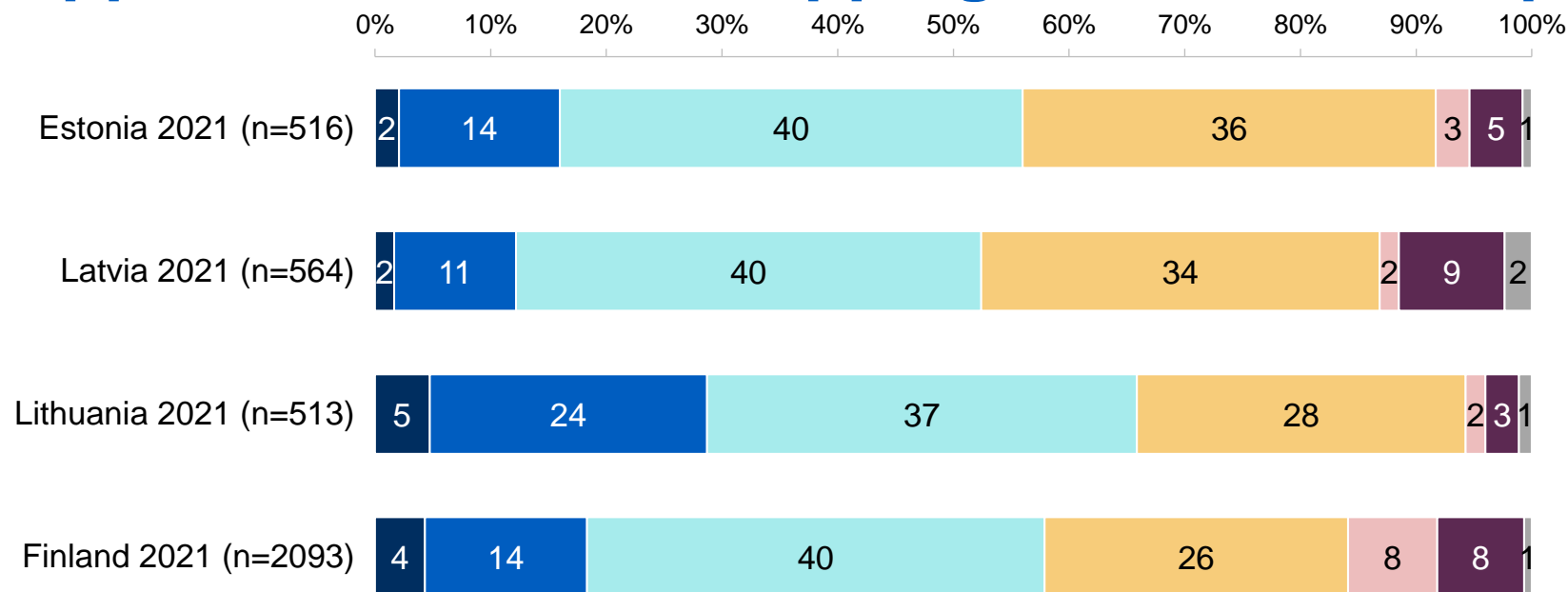
Estonia 2021 (n=516)

Which of the following statements best describe your approach to online shopping and online shops?



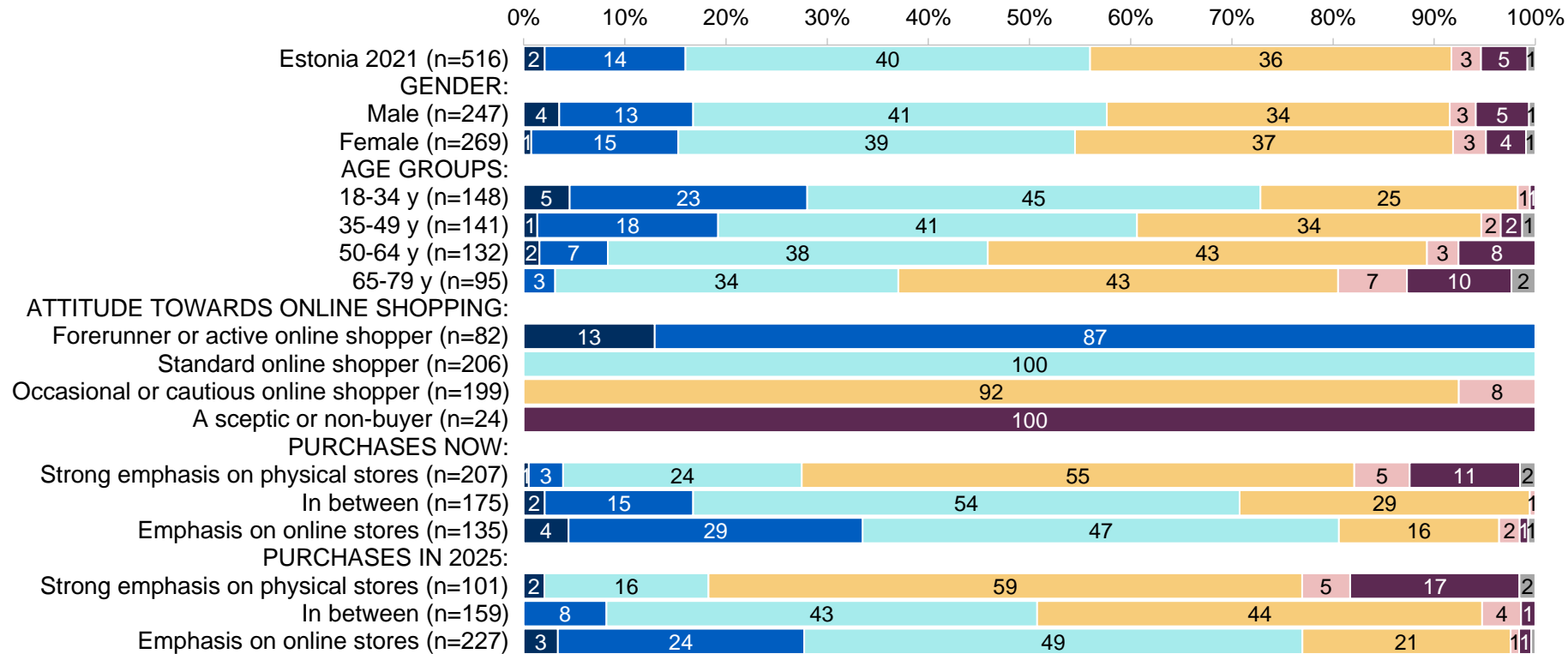
- I am a forerunner, I look forward to the new possibilities of e-commerce
- I am active, I shop a lot online and I intend to use online shops more and more in future
- I am a standard user, shopping online is easy for me
- I shop online occasionally, I prefer to shop elsewhere
- I am willing to try it, I am not very familiar with online shops
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- I don't know

Which of the following statements best describe your approach to online shopping and online shops?



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- I am active, I shop a lot online and I intend to use online shops more and more in future
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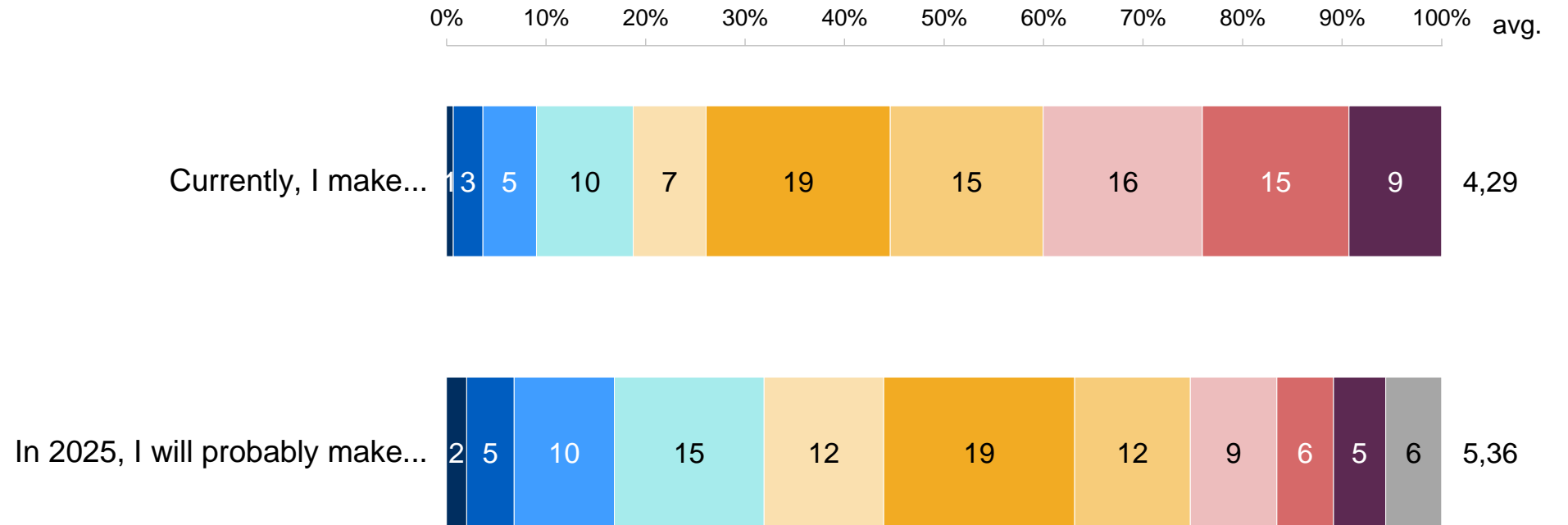
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if n<50 result only indicative

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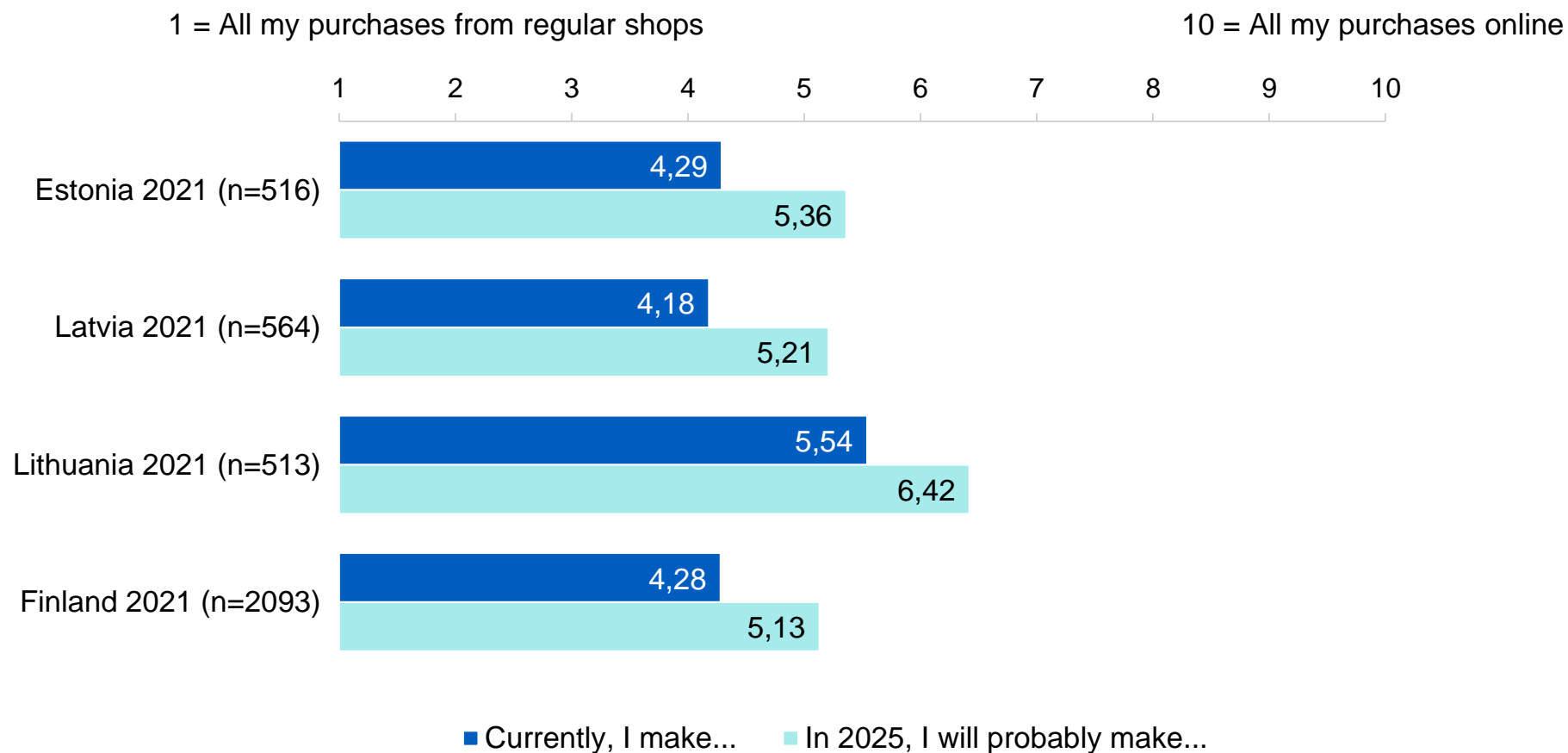
Describe your approach to shopping in physical stores versus shopping online on a scale of 1 to 10



■ 10 = All my purchases online ■ 9 ■ 8 ■ 7 ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ 1 = All my purchases from regular shops ■ I don't know

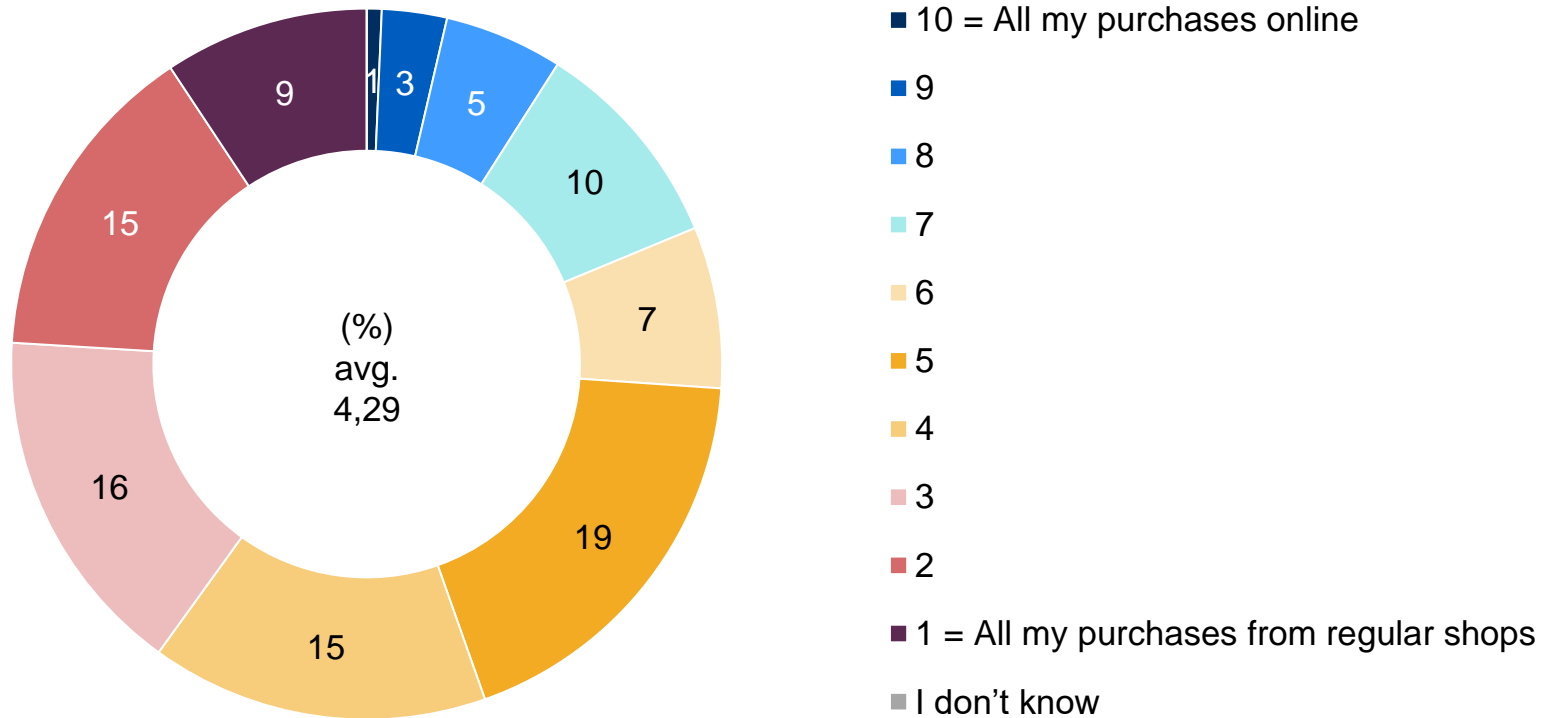
Estonia 2021 (n=516)

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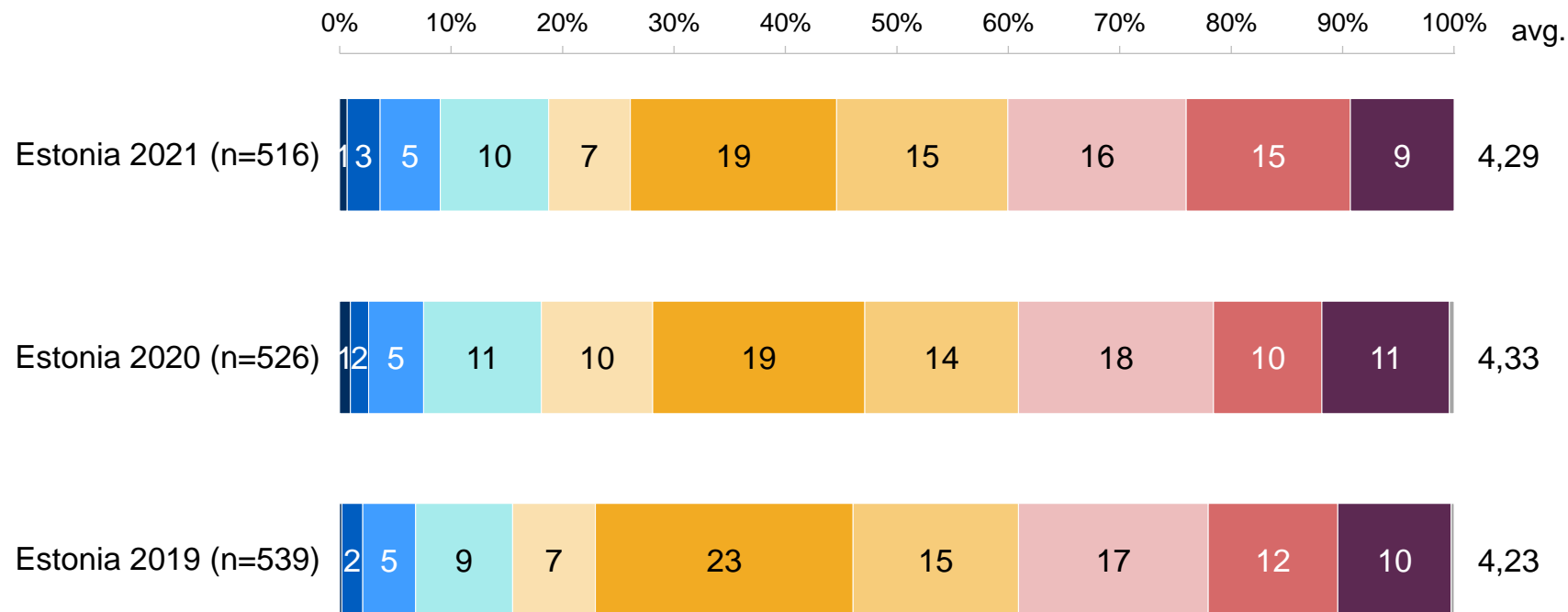
Currently, I make...



Estonia 2021 (n=516)

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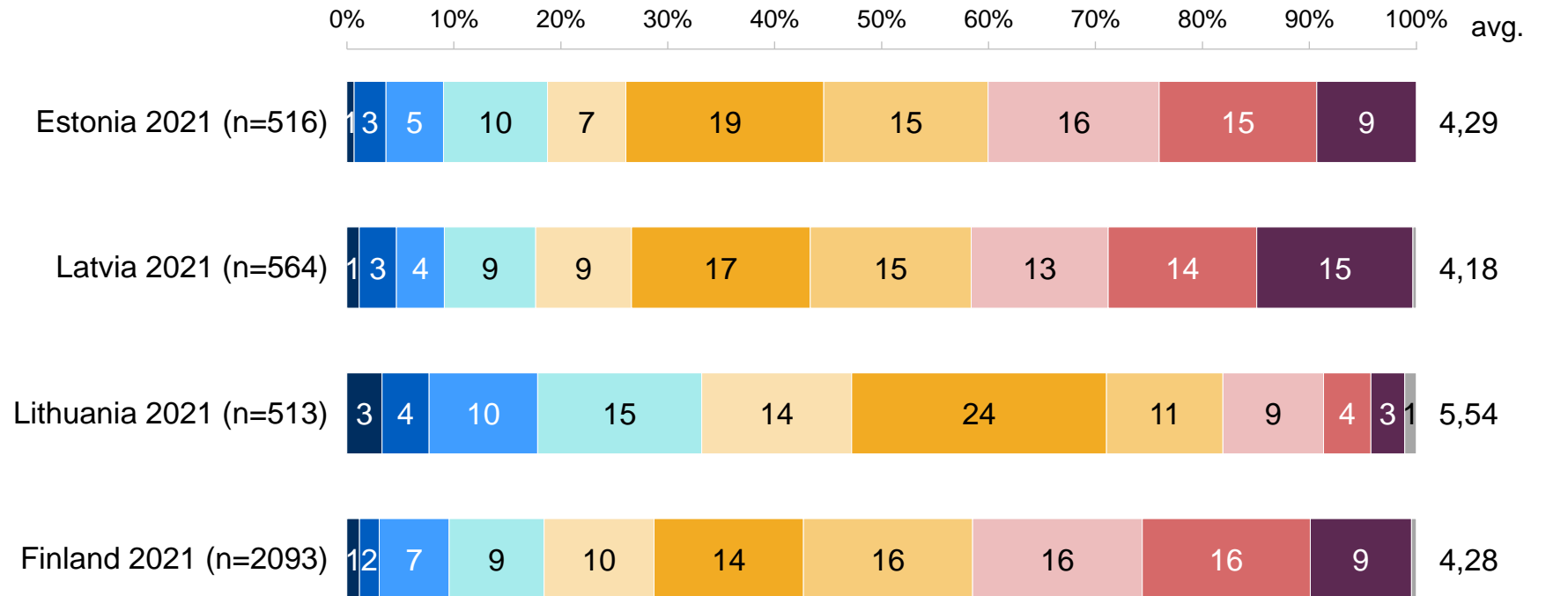
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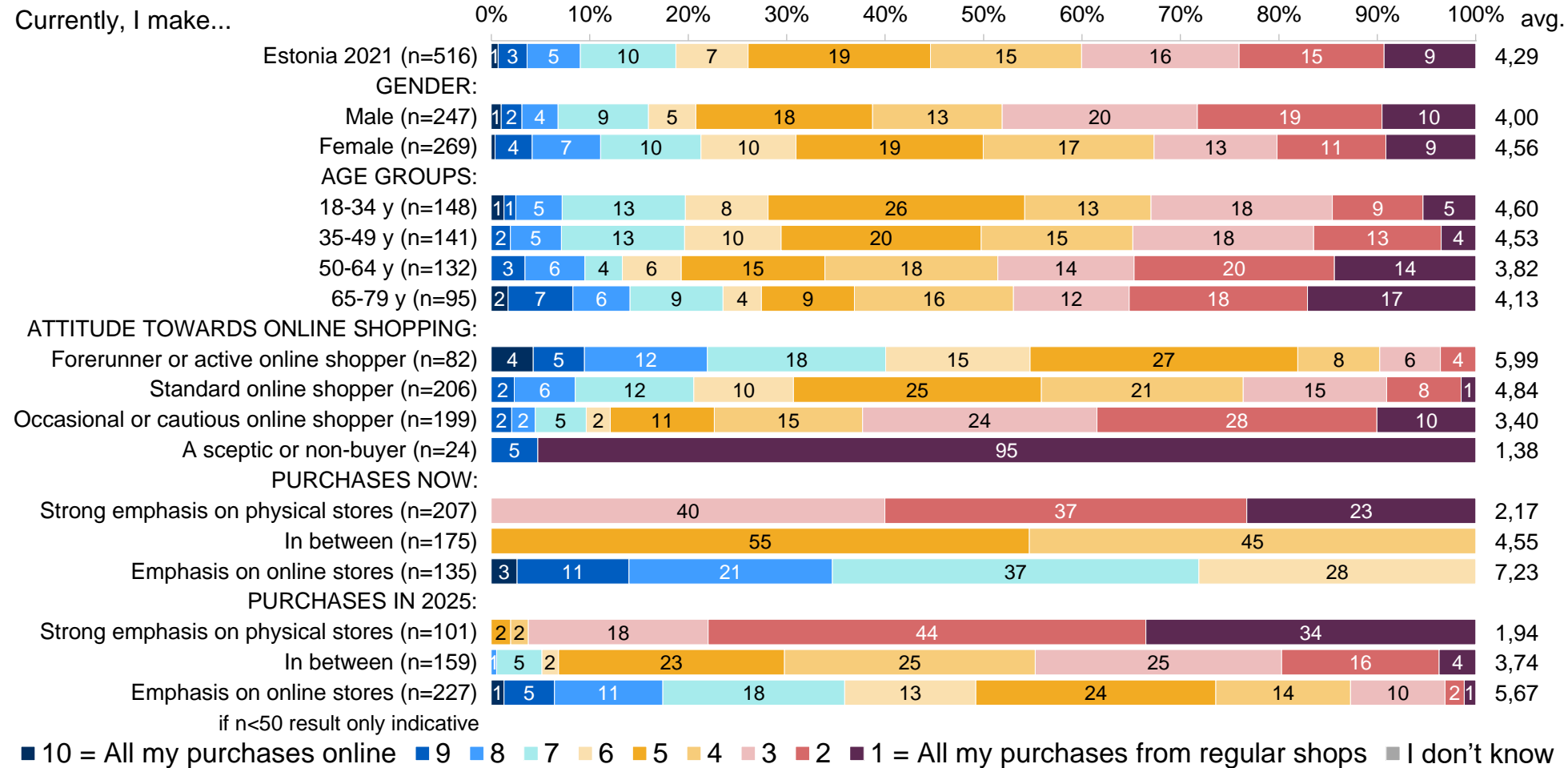
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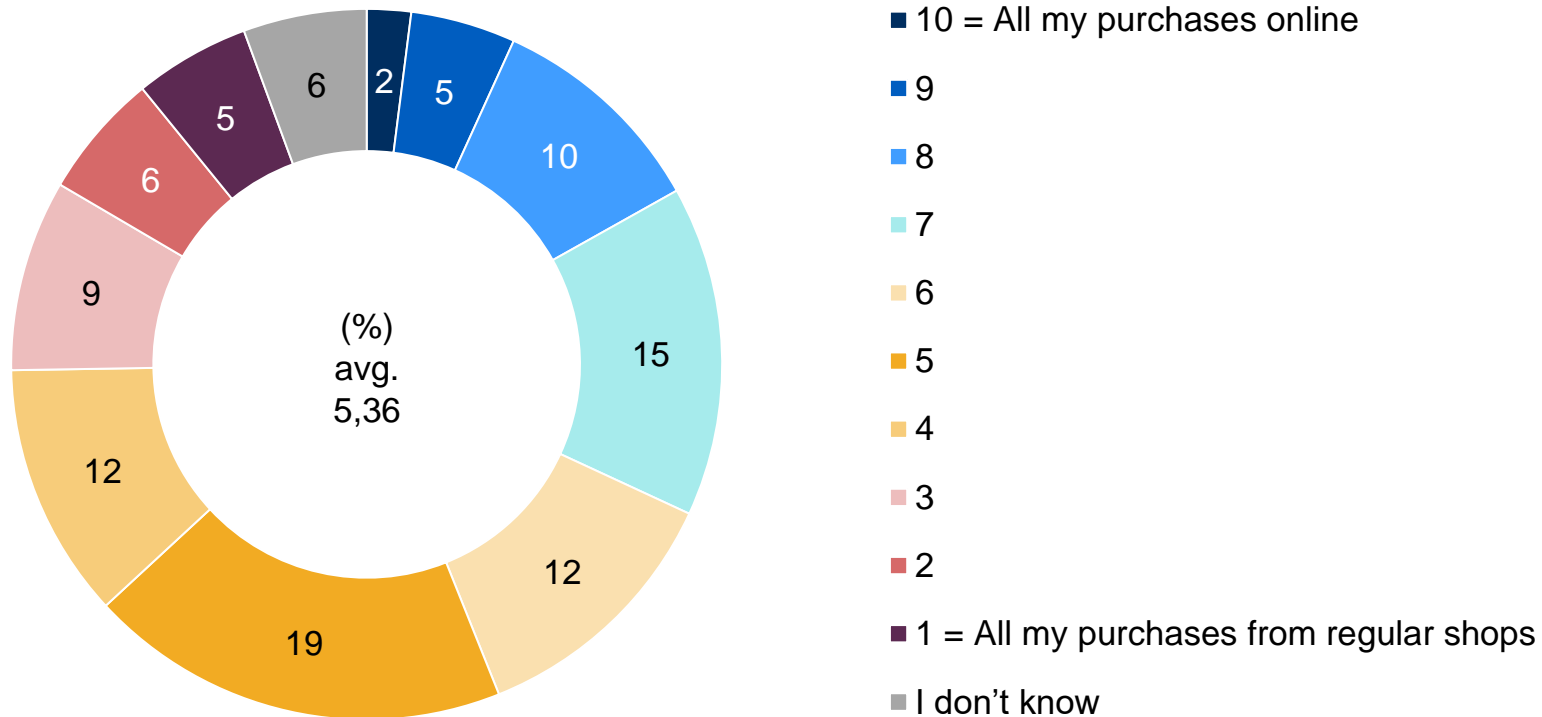
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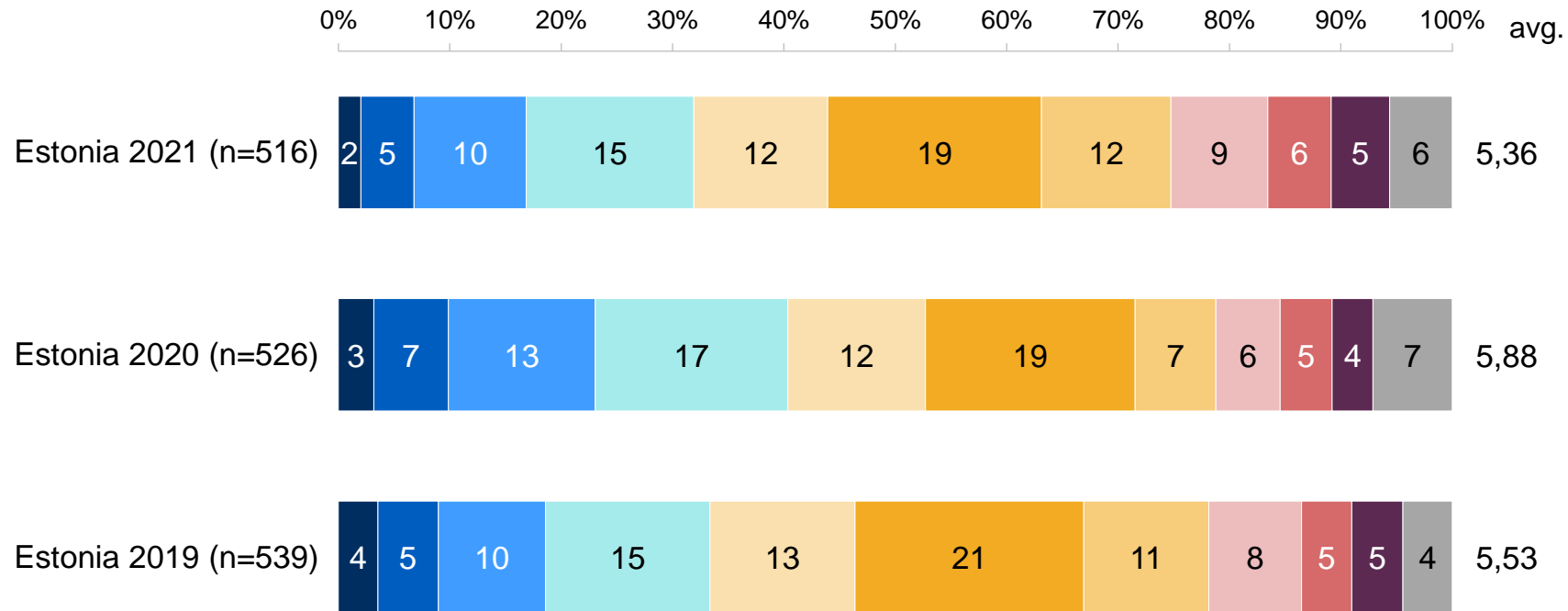
In 2025, I will probably make...



Estonia 2021 (n=516)

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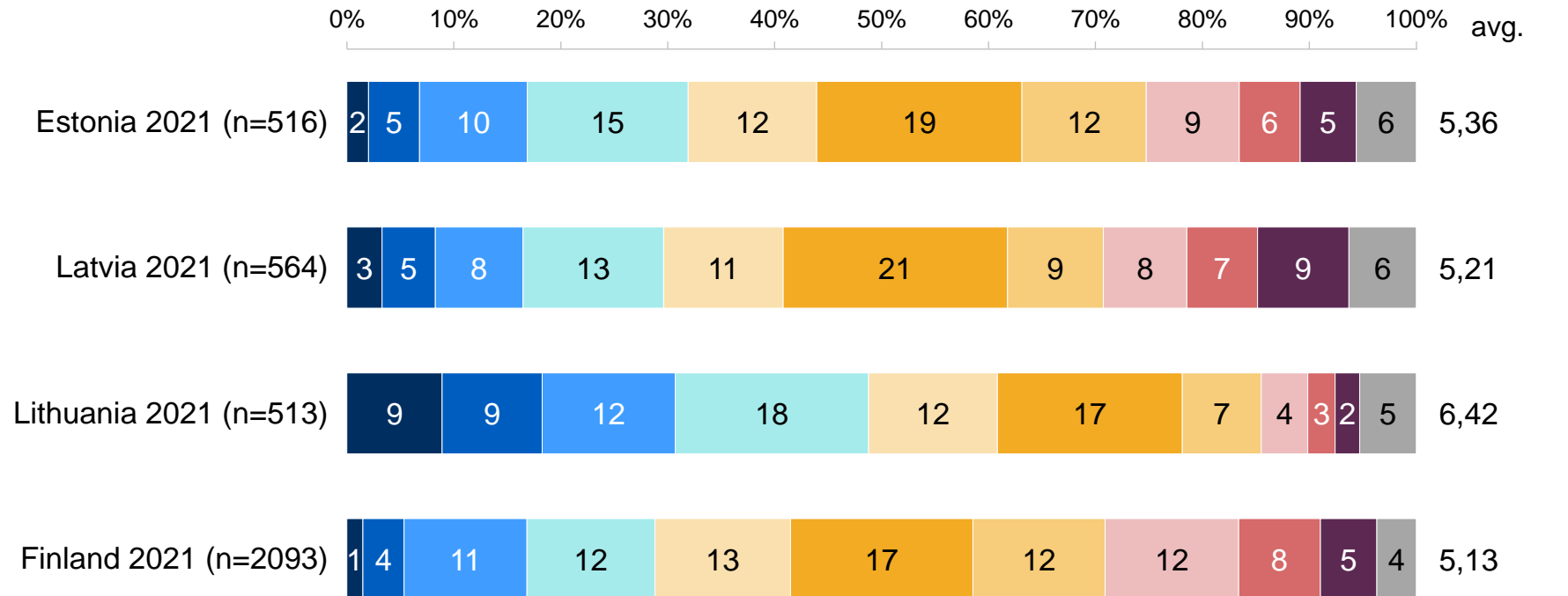
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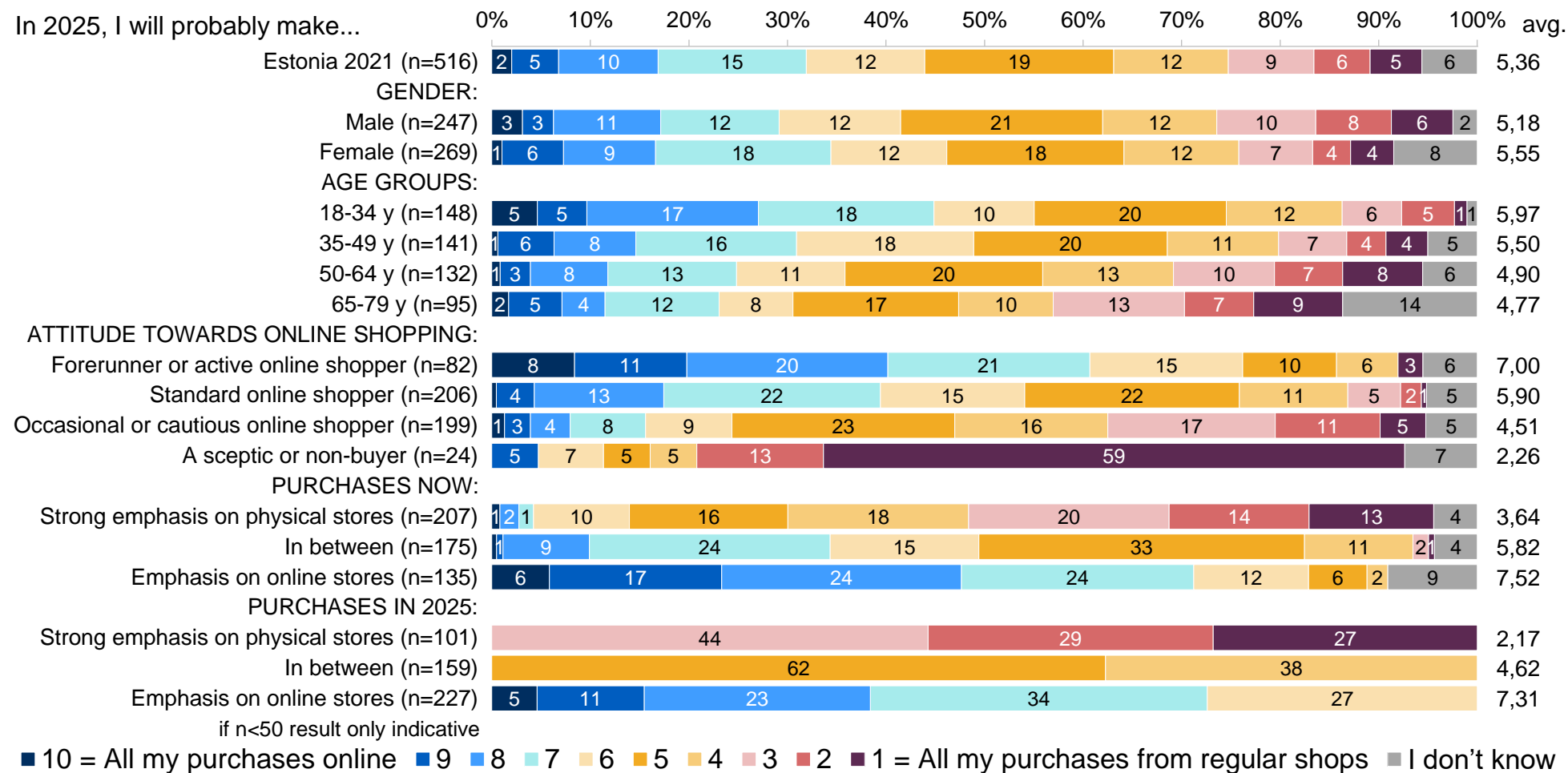
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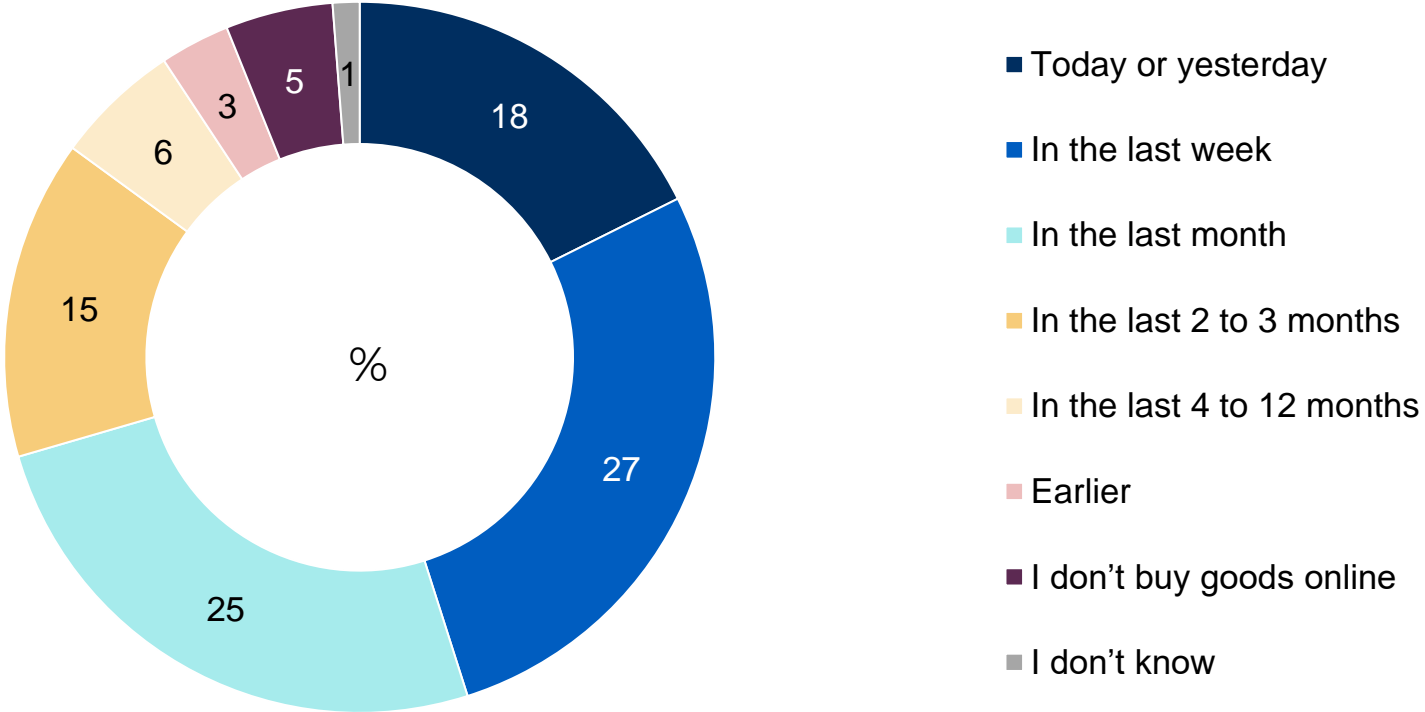
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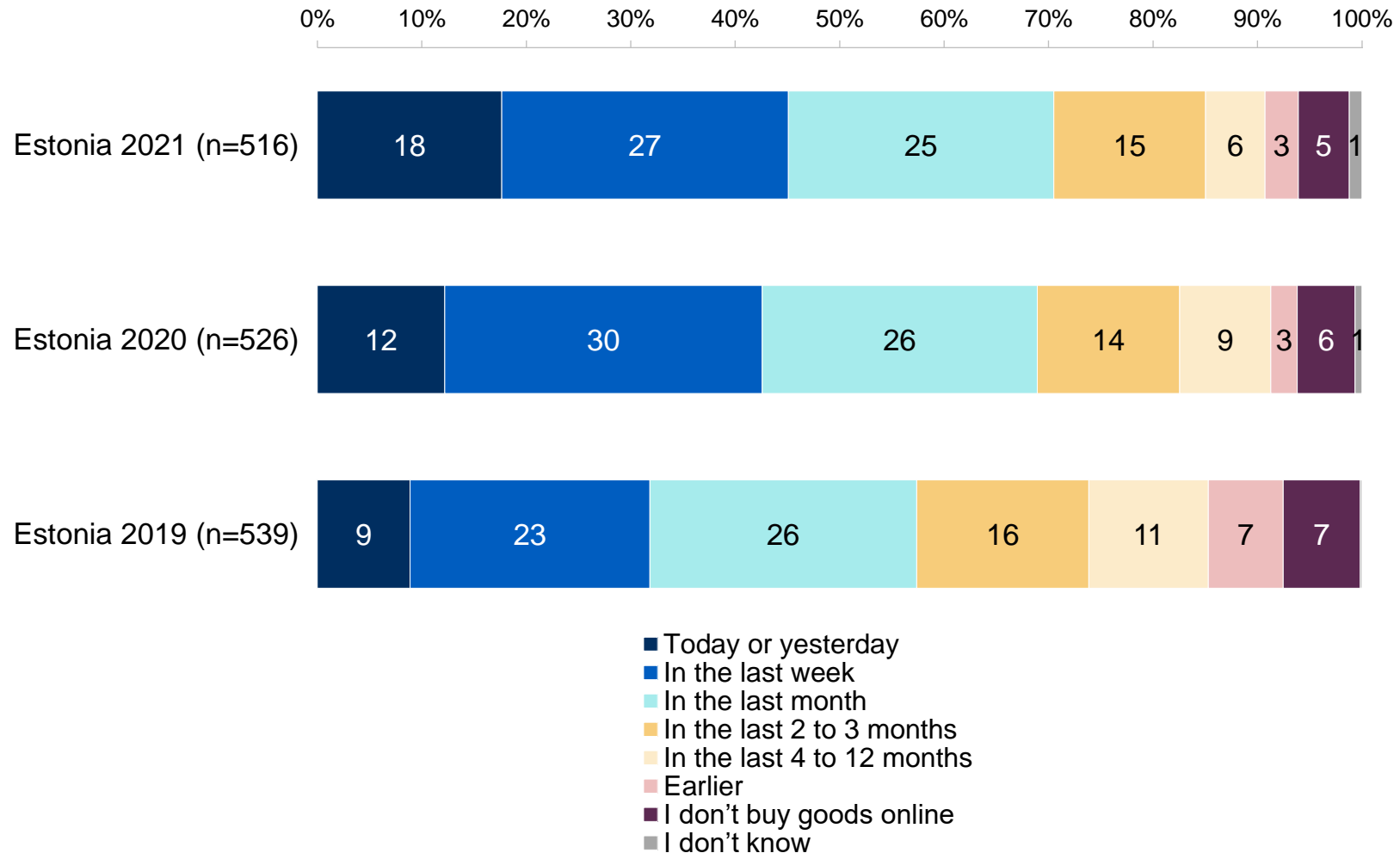
Change in online shopping

When was the last time you bought goods online?

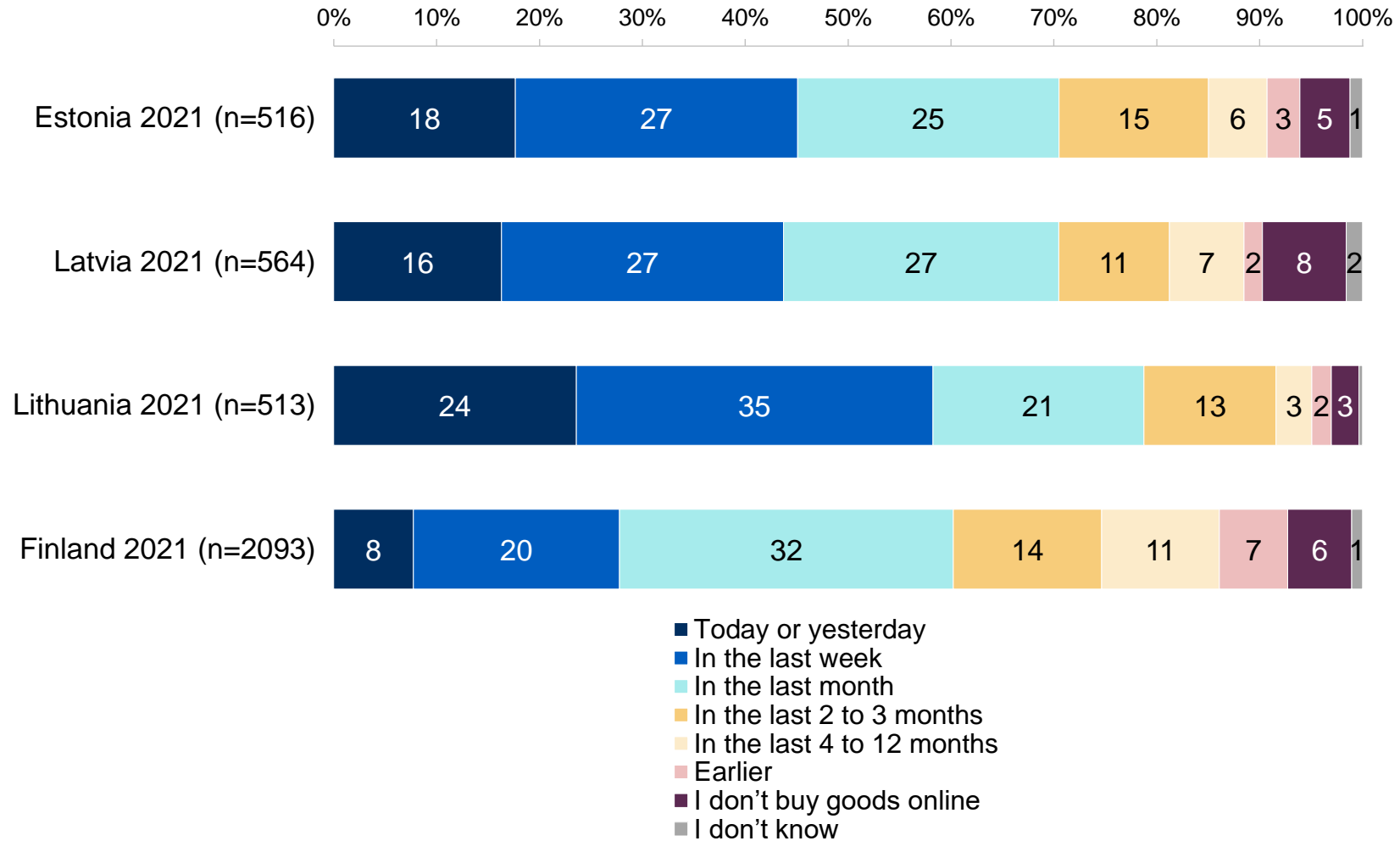


Estonia 2021 (n=516)

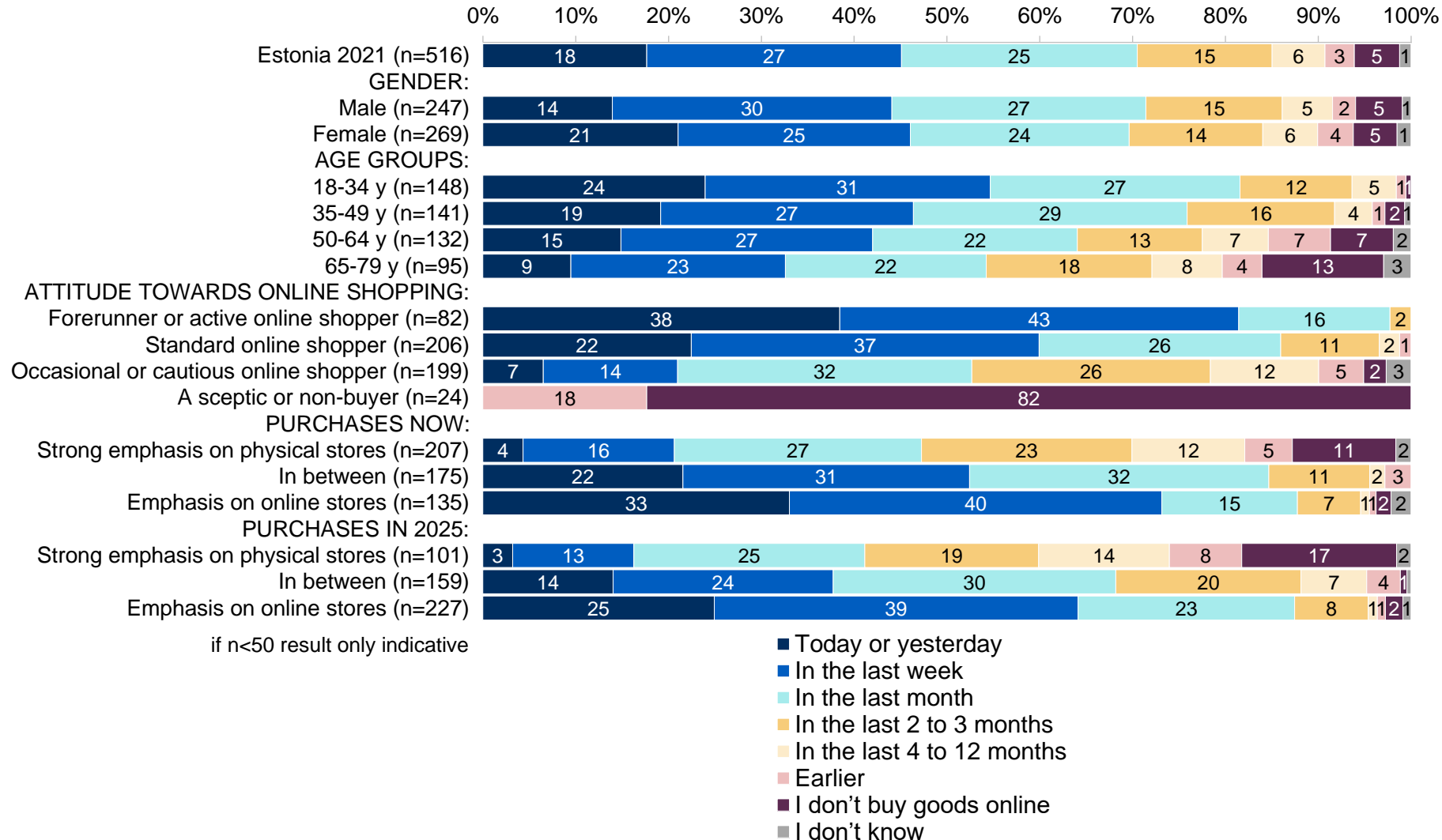
When was the last time you bought goods online?



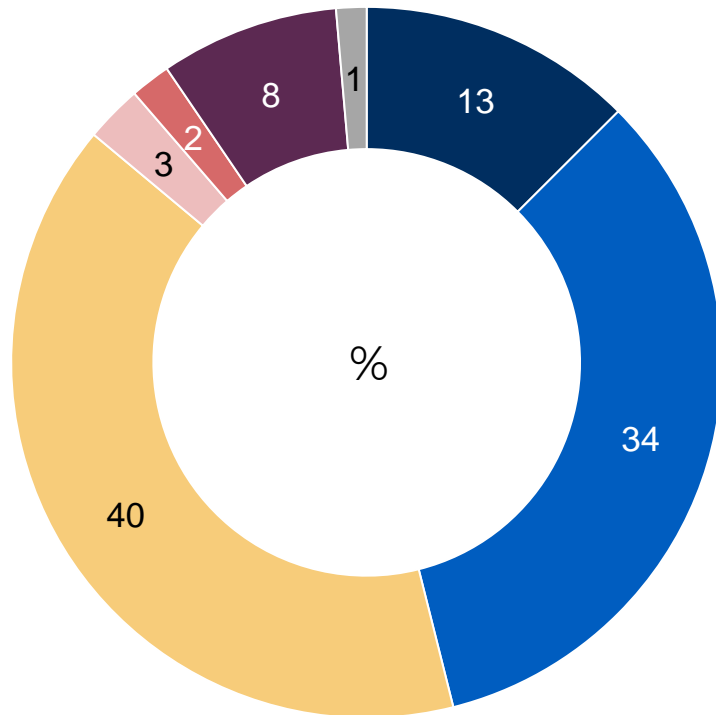
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When was the last time you bought goods online?



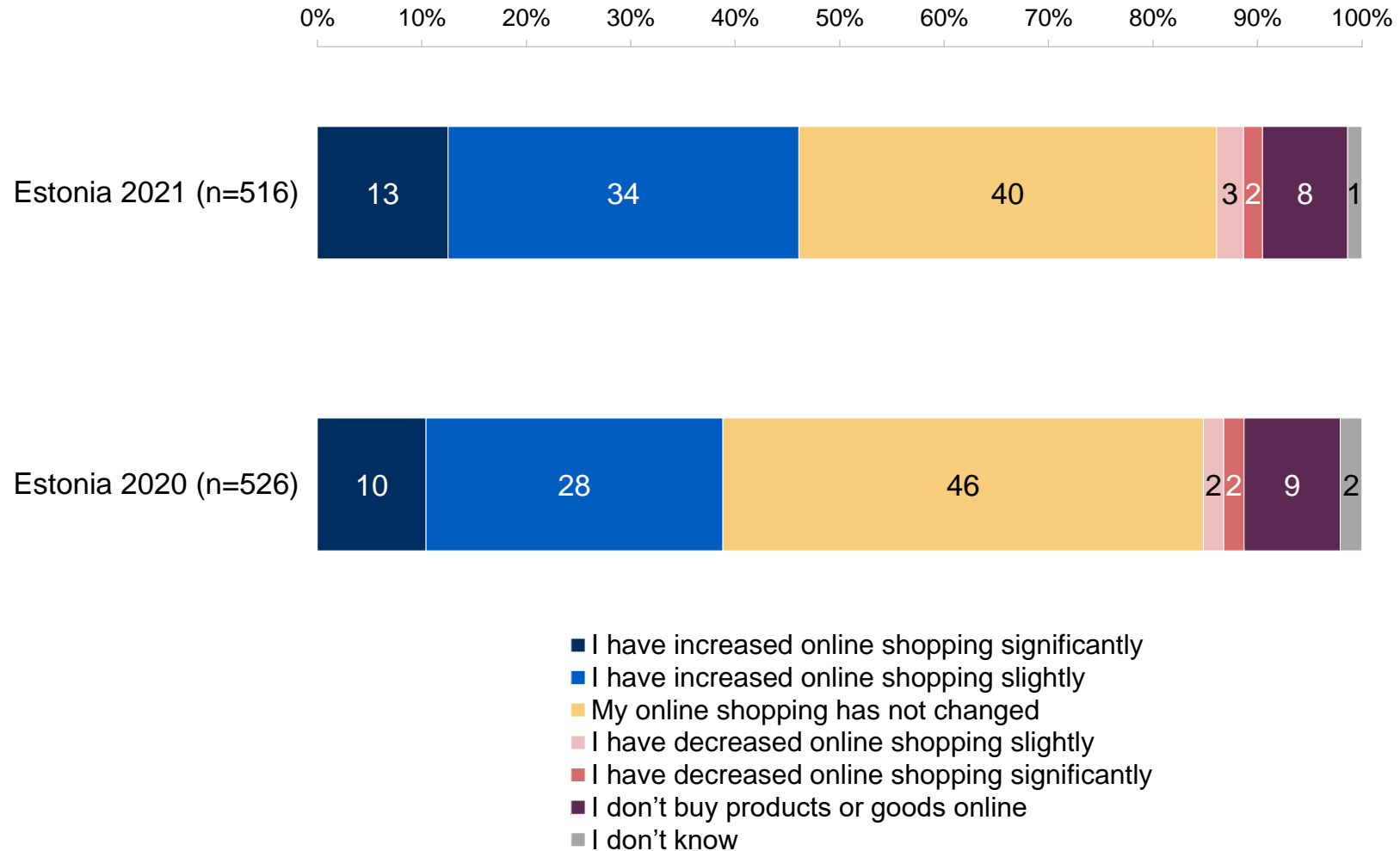
How has the amount of your online shopping evolved in the last 6 months?



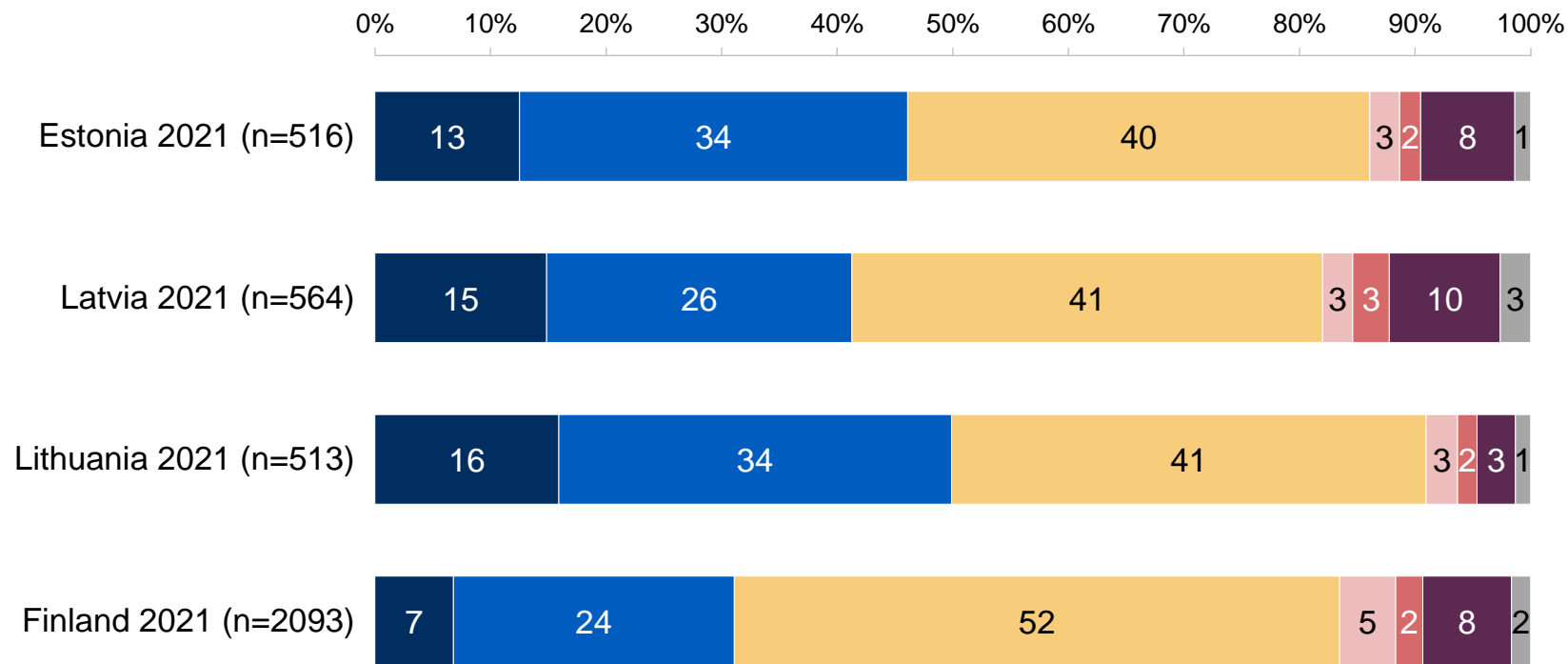
- I have increased online shopping significantly
- I have increased online shopping slightly
- My online shopping has not changed
- I have decreased online shopping slightly
- I have decreased online shopping significantly
- I don't buy products or goods online
- I don't know

Estonia 2021 (n=516)

How has the amount of your online shopping evolved in the last 6 months?

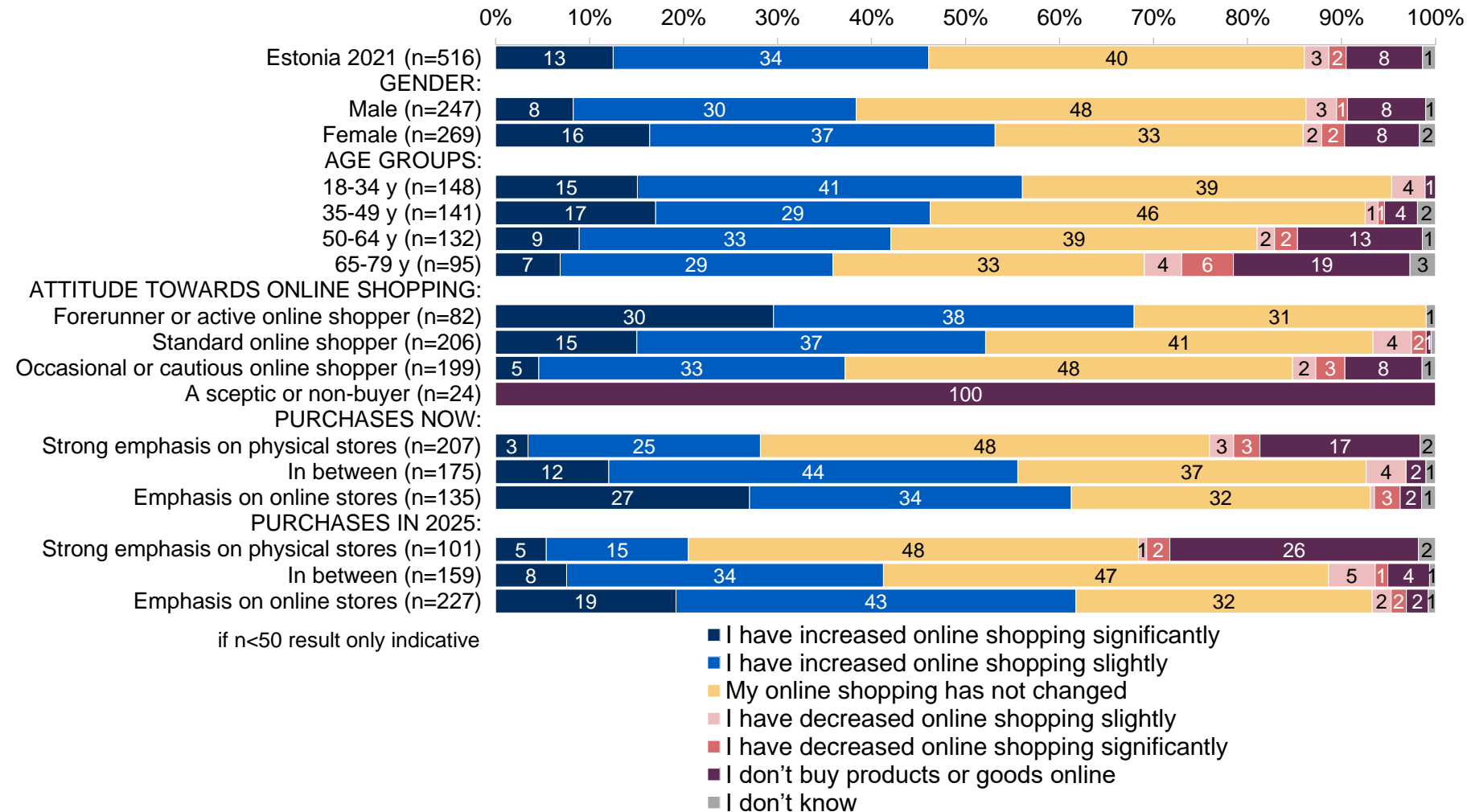


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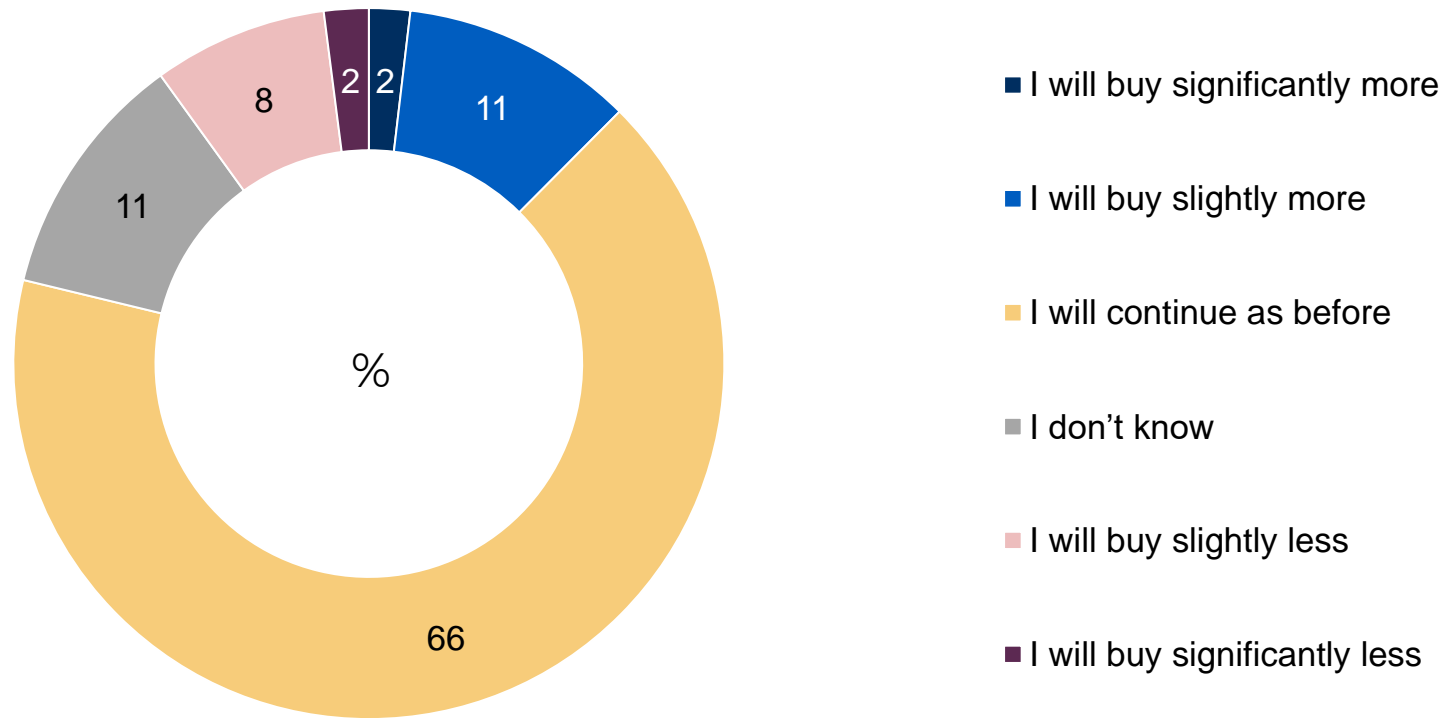


- I have increased online shopping significantly
- I have increased online shopping slightly
- My online shopping has not changed
- I have decreased online shopping slightly
- I have decreased online shopping significantly
- I don't buy products or goods online
- I don't know

How has the amount of your online shopping evolved in the last 6 months?

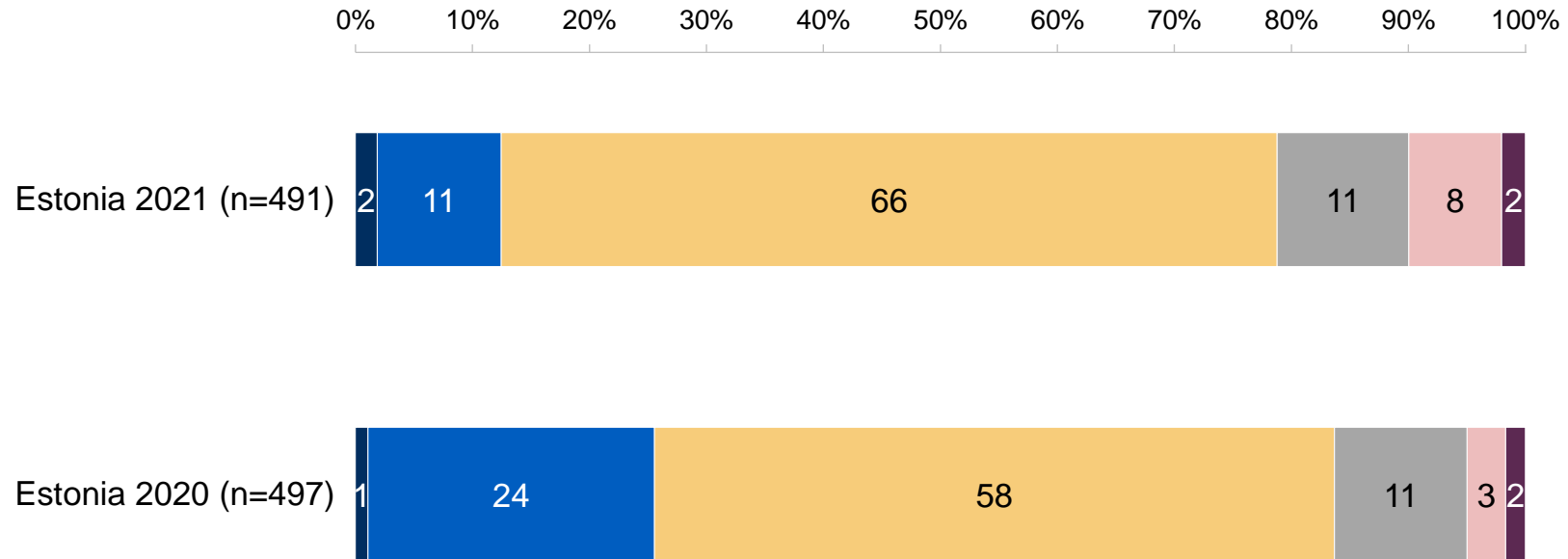


All in all, how much you are going to buy products and goods online in the next six months?



Estonia 2021 (n=491)

All in all, how much you are going to buy products and goods online in the next six months?

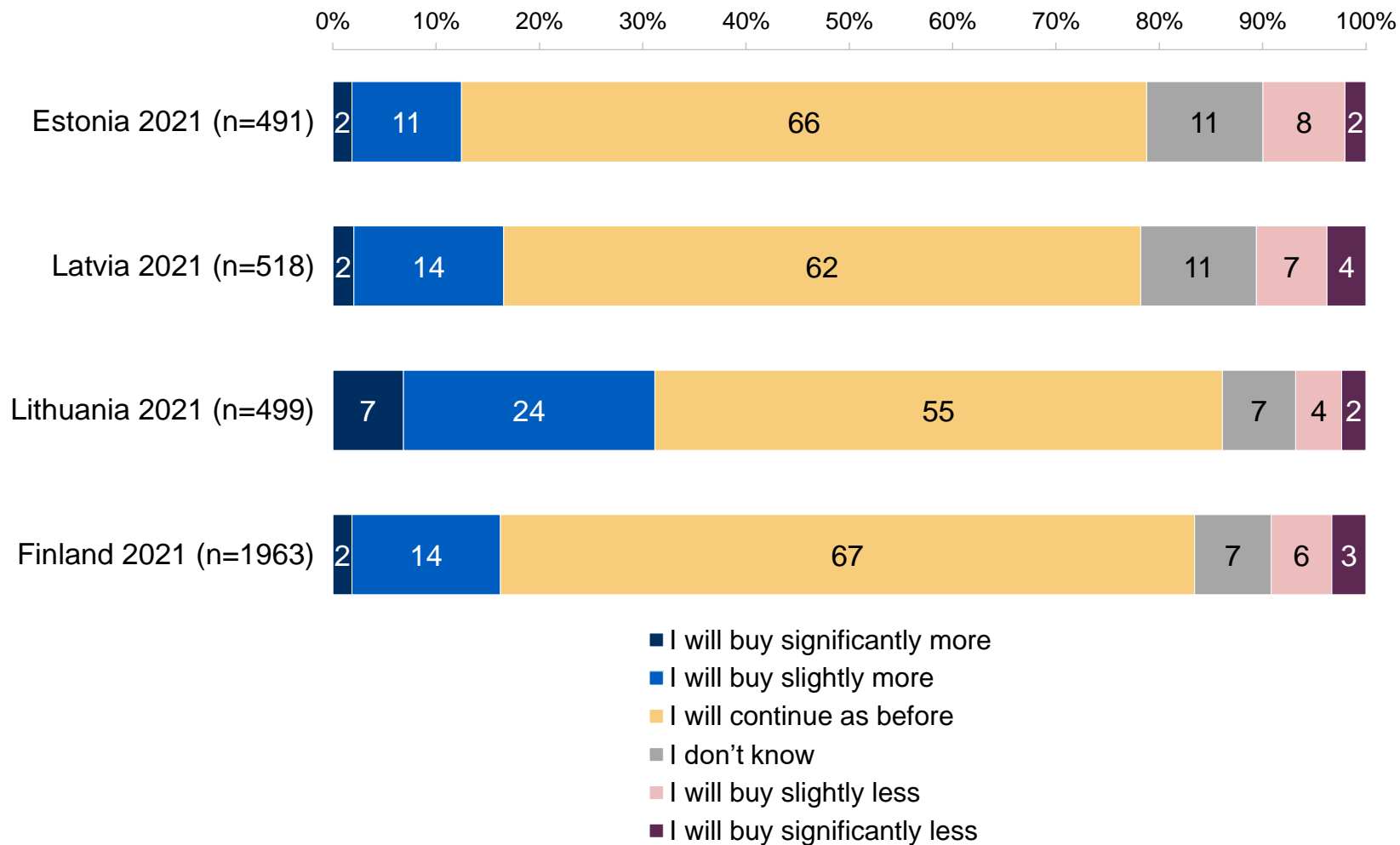


Please note: The question changed, therefore annual comparison indicative only.
 2020: How much do you intend to increase shopping online for products and goods in general over the next 6 months?

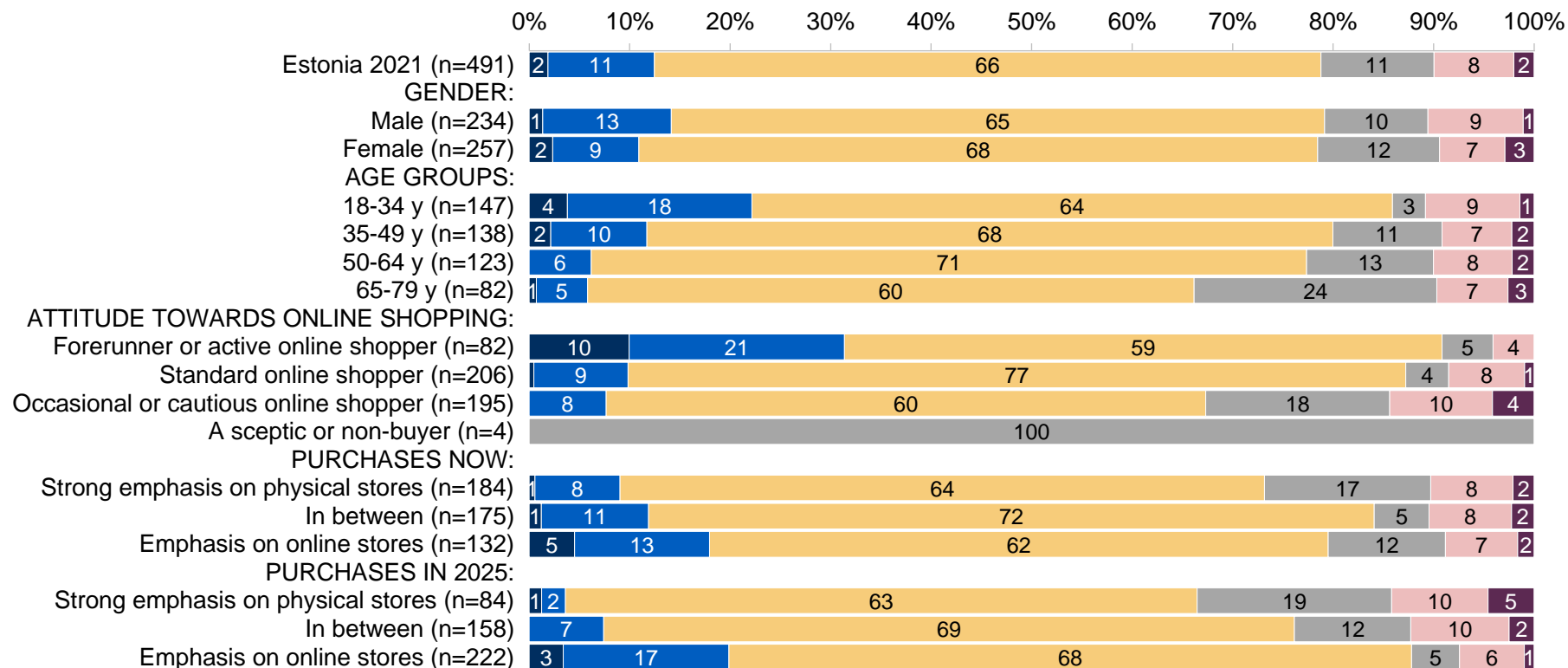
- I will increase it significantly
- I will increase it slightly
- I will continue as before
- I will decrease it slightly
- I will decrease it significantly
- I don't know

- I will buy significantly more
- I will buy slightly more
- I will continue as before
- I don't know
- I will buy slightly less
- I will buy significantly less

All in all, how much you are going to buy products and goods online in the next six months?



All in all, how much you are going to buy products and goods online in the next six months?

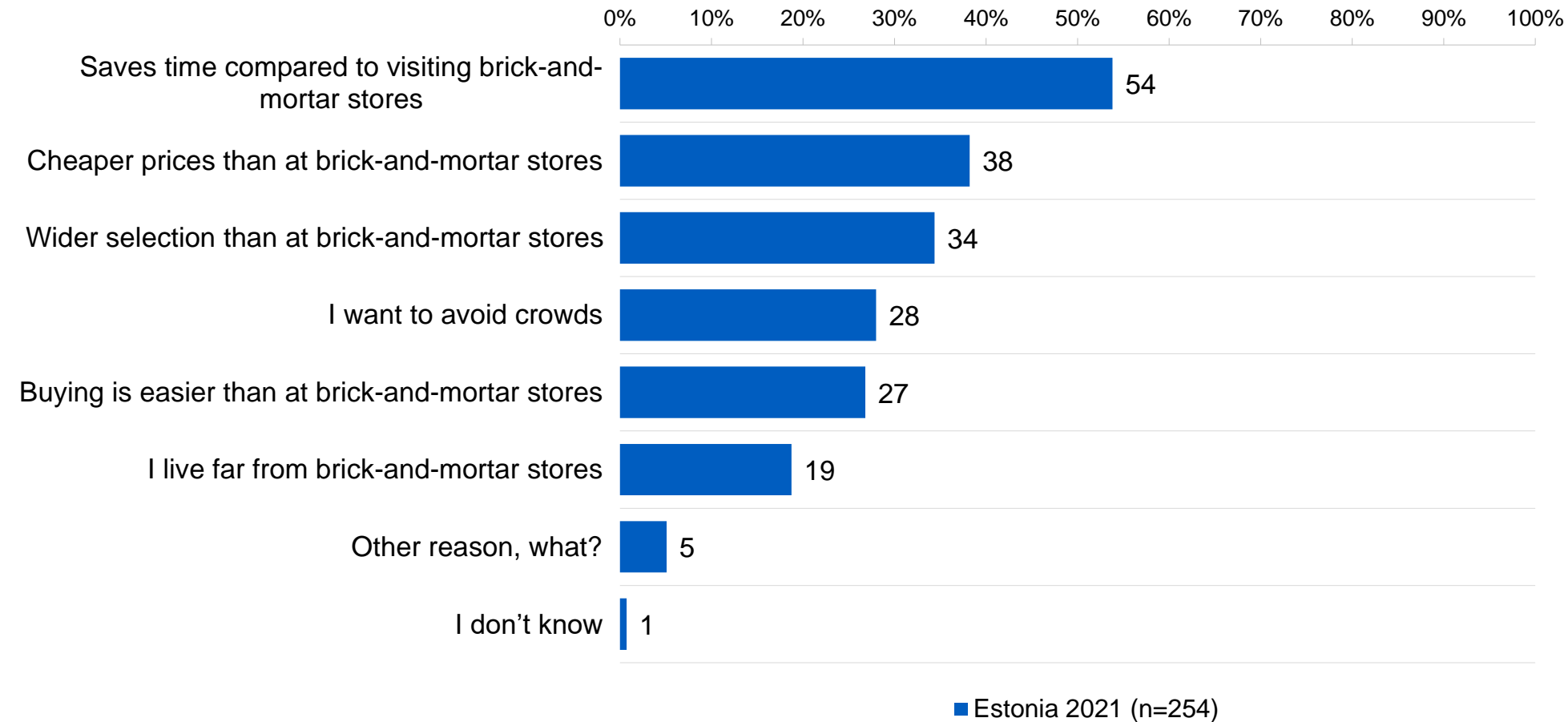


if n<50 result only indicative

- I will buy significantly more
- I will buy slightly more
- I will continue as before
- I don't know
- I will buy slightly less
- I will buy significantly less

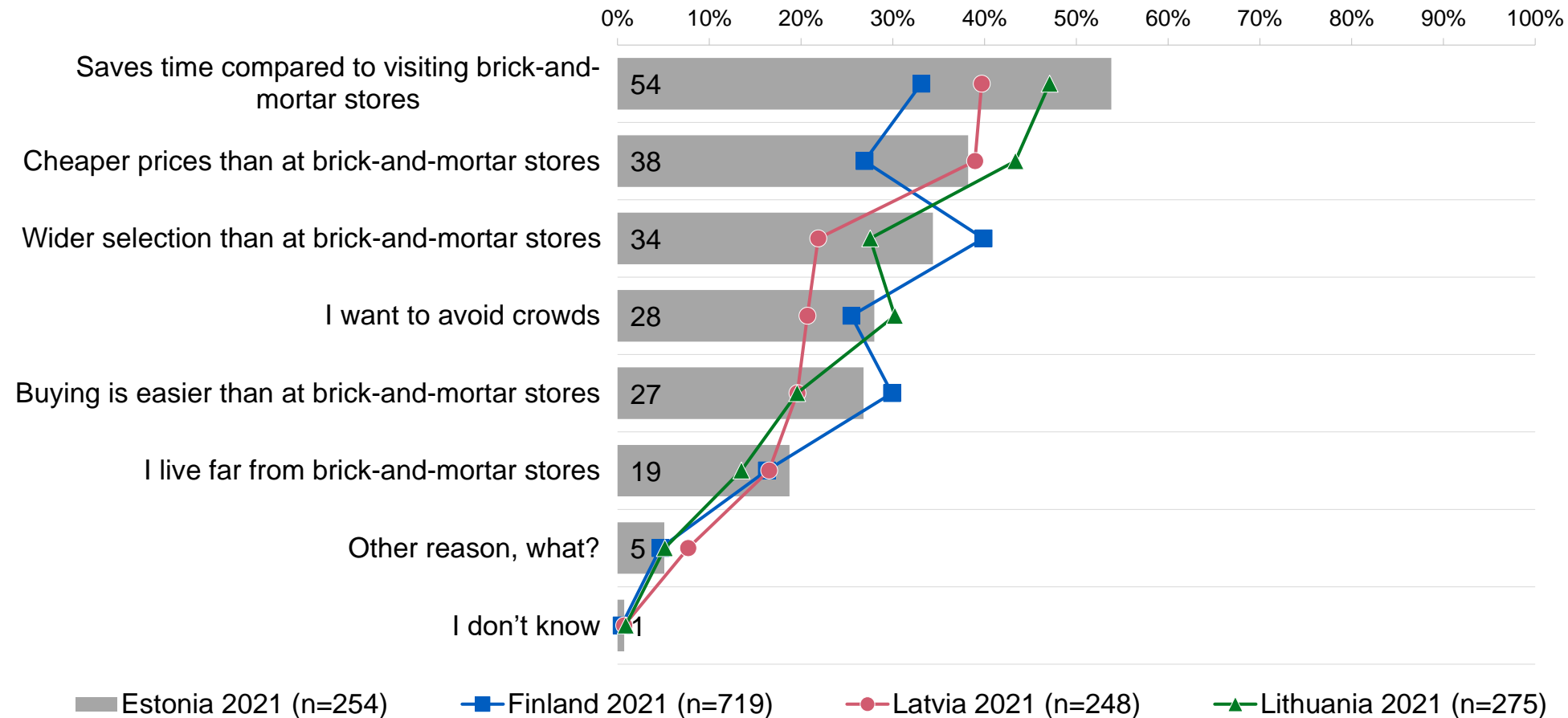
What is the main reason you have/will increase your online shopping?

If increased online shopping during latest 6 months or will increase during next 6 months



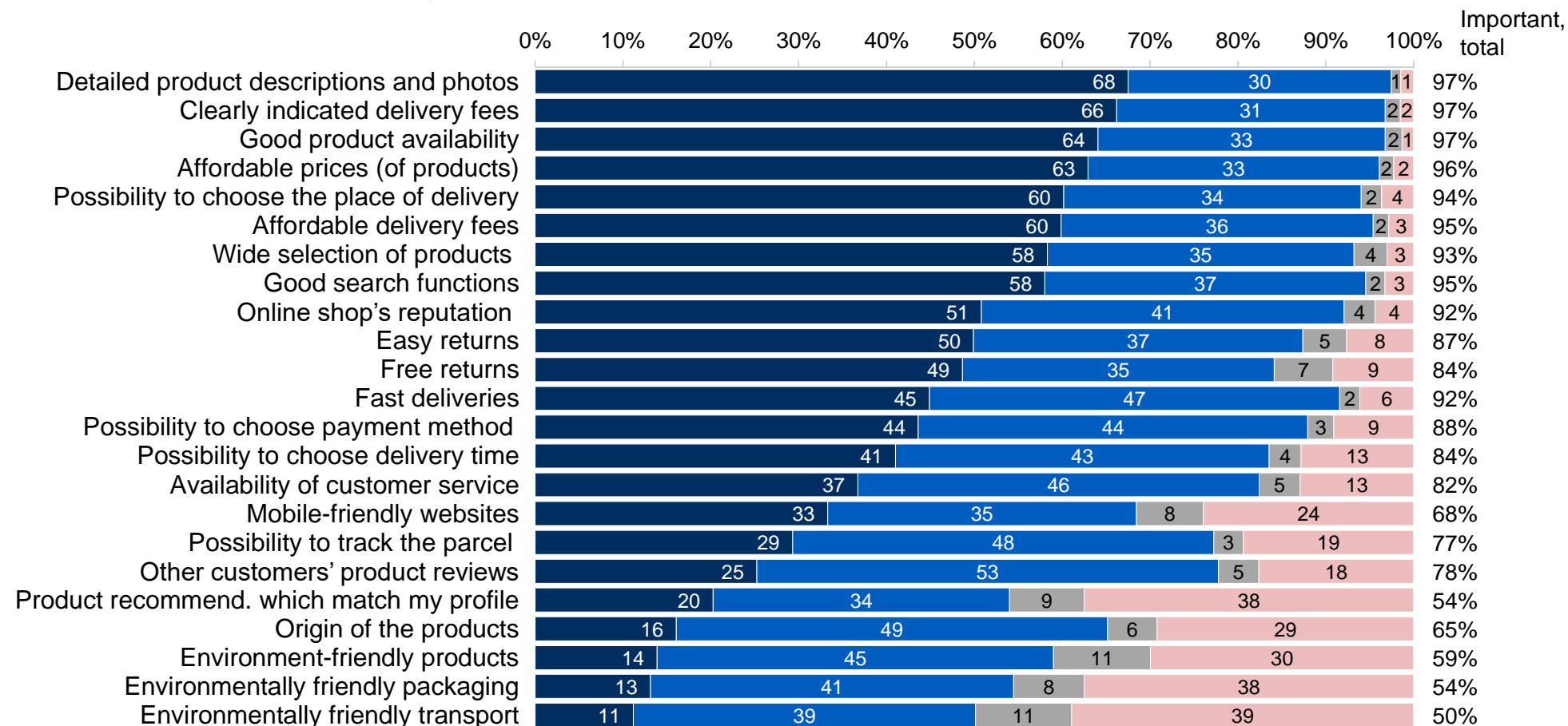
What is the main reason you have/will increase your online shopping?

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Motivators related to online shopping

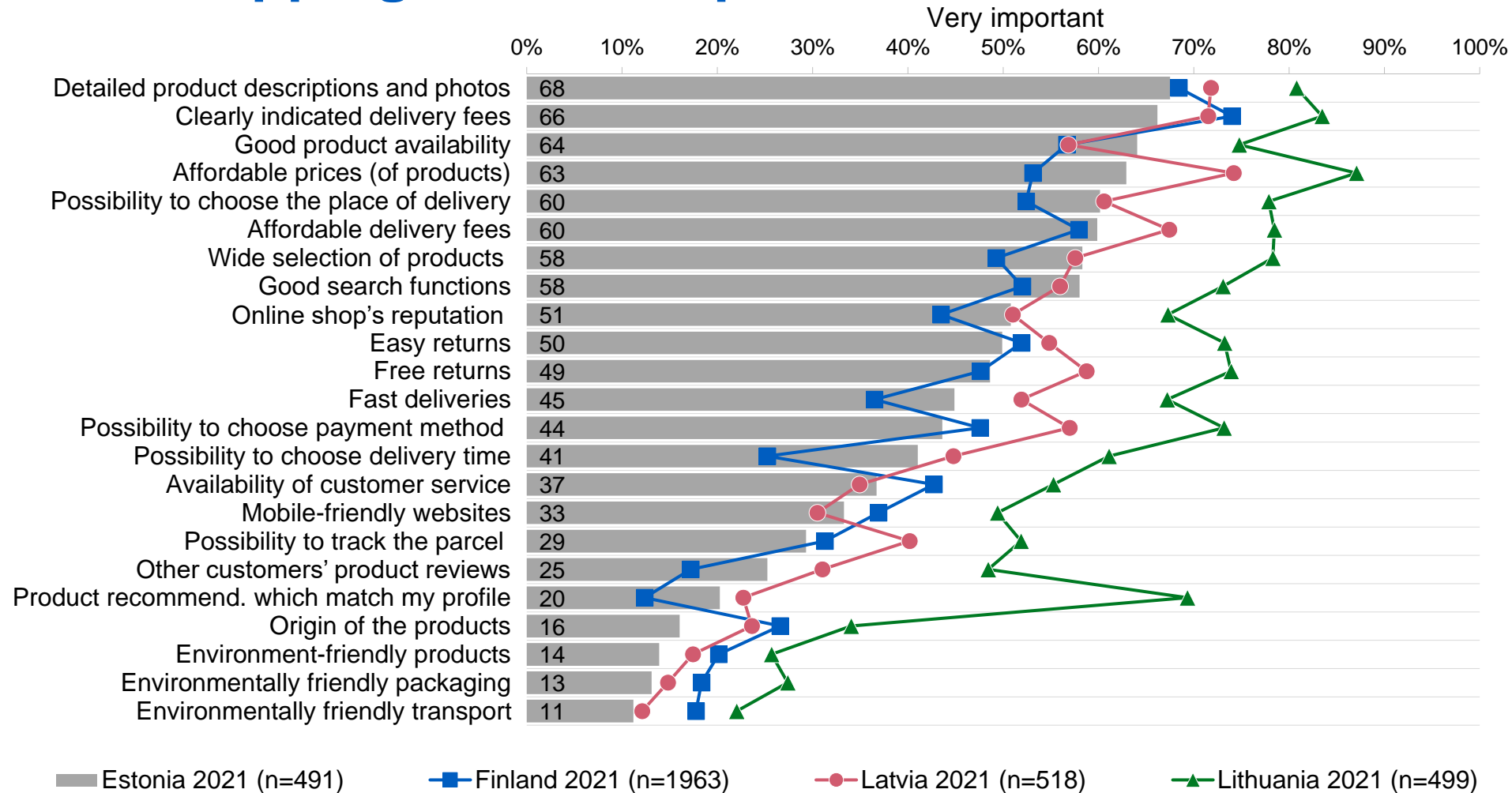
Which of the following factors are important to you, when shopping online for products?



Estonia 2021 (n=491)

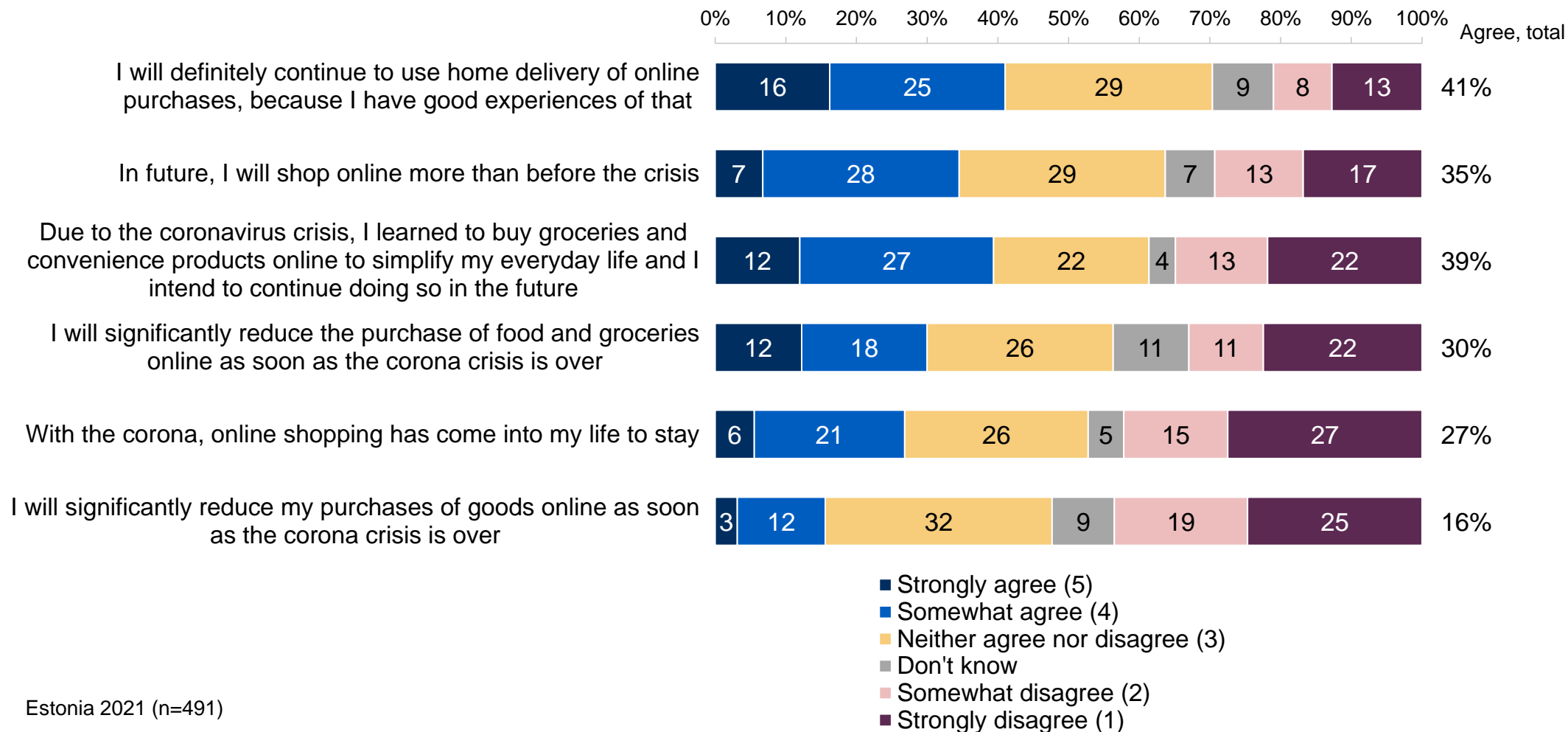
■ Very important
 ■ Somewhat important
 ■ I don't know
 ■ Not important at all

Which of the following factors are important to you, when shopping online for products?



Impact of COVID-19

Do you agree or disagree with the following statements?

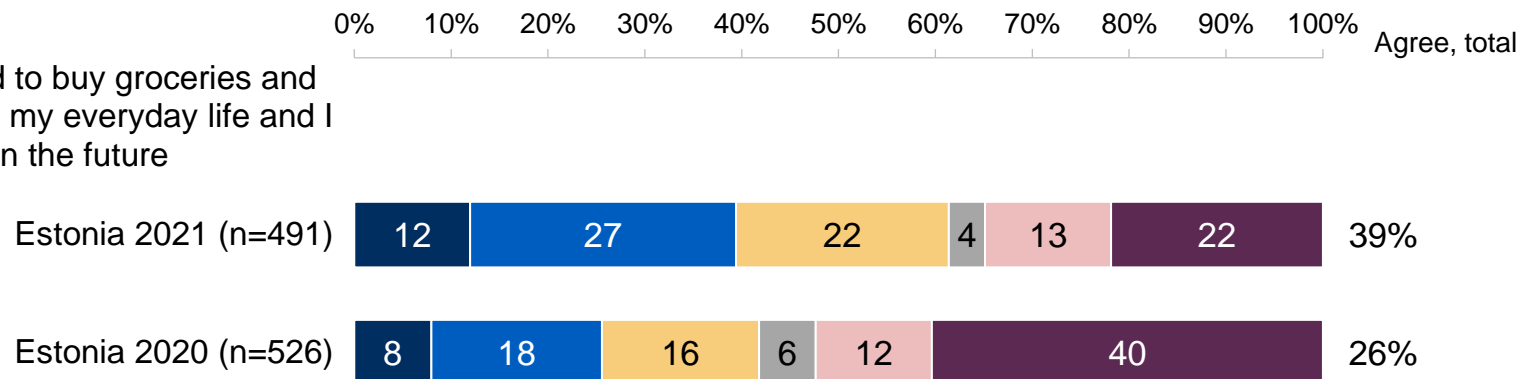


Estonia 2021 (n=491)

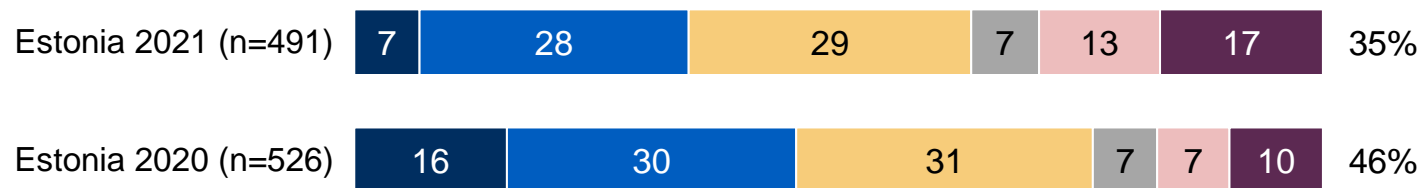
Impact of COVID-19

Do you agree or disagree with the following statements?

Due to the coronavirus crisis, I learned to buy groceries and convenience products online to simplify my everyday life and I intend to continue doing so in the future



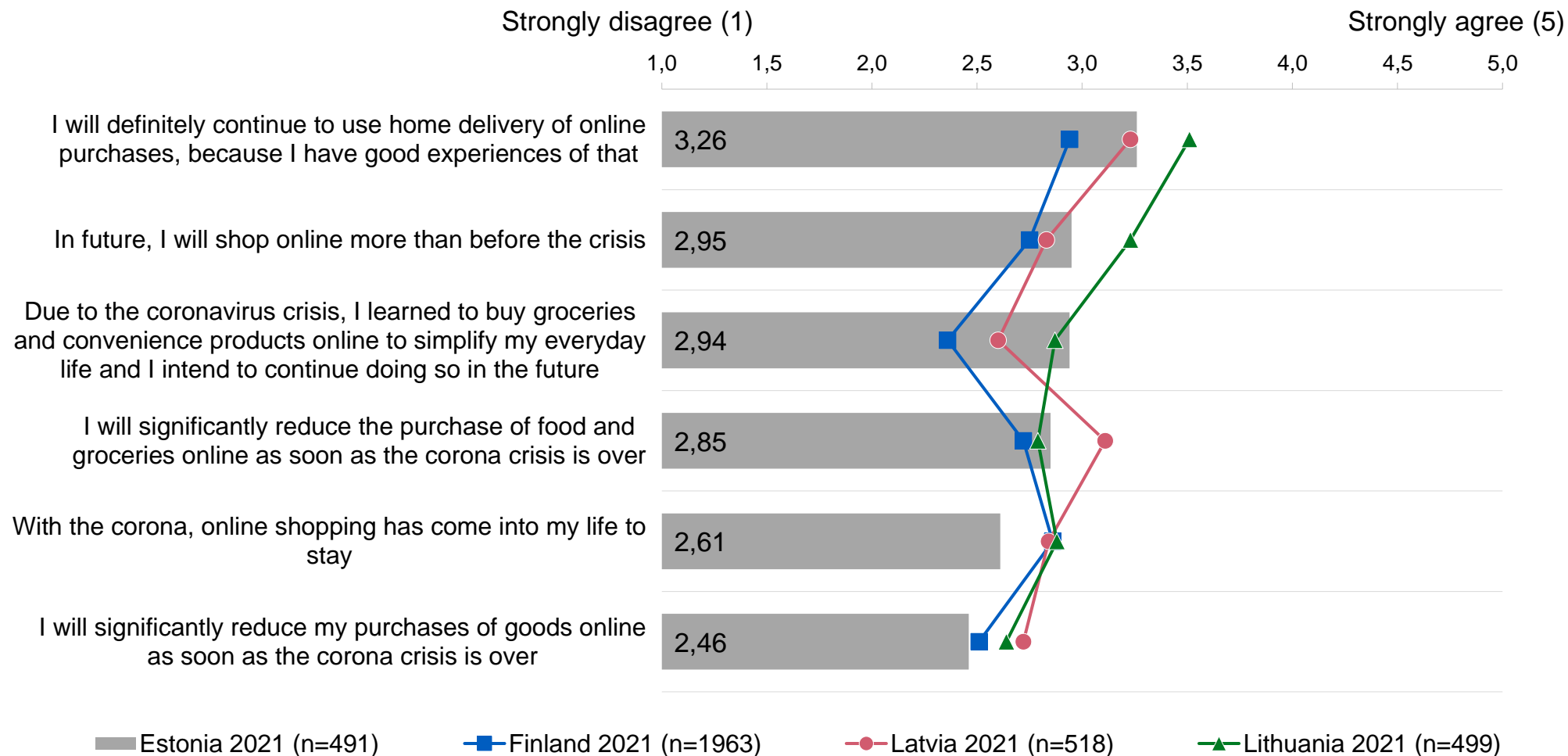
In future, I will shop online more than before the crisis



- Strongly agree (5)
- Somewhat agree (4)
- Neither agree nor disagree (3)
- Don't know
- Somewhat disagree (2)
- Strongly disagree (1)

Impact of COVID-19

Do you agree or disagree with the following statements?



Online shopping motivations

Do you agree or disagree with the following statements?



Estonia 2021 (n=491)

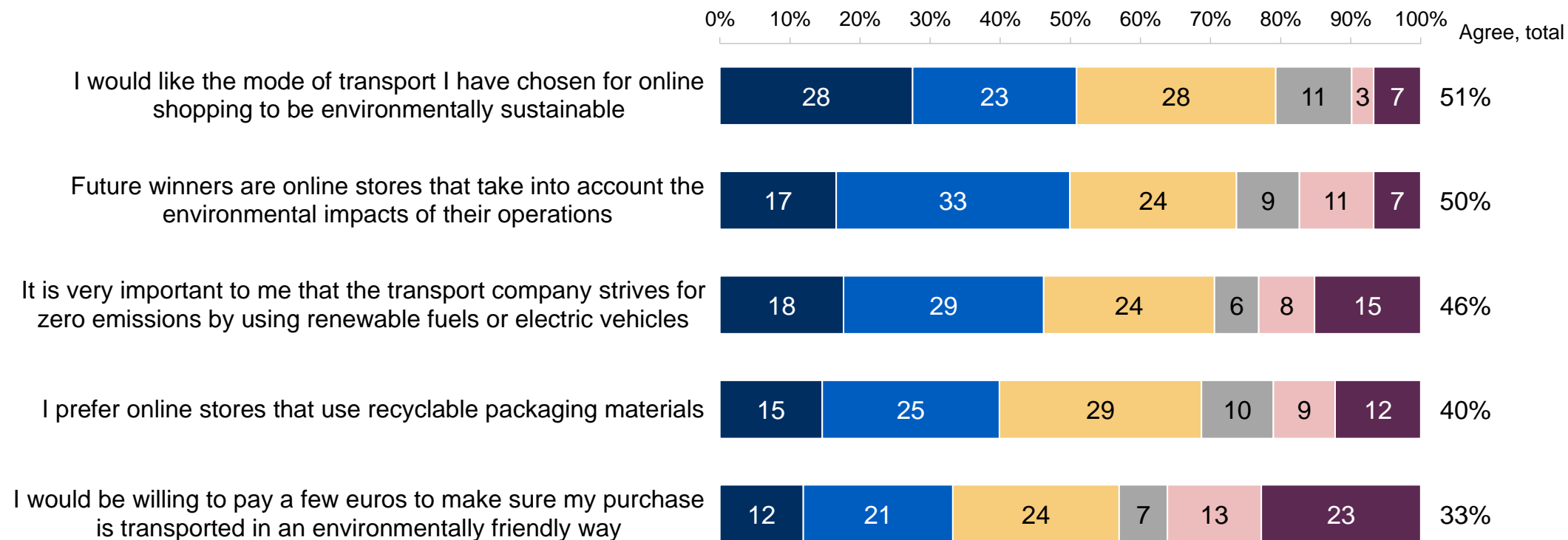
Online shopping motivations

Do you agree or disagree with the following statements?



Sustainability

Do you agree or disagree with the following statements?

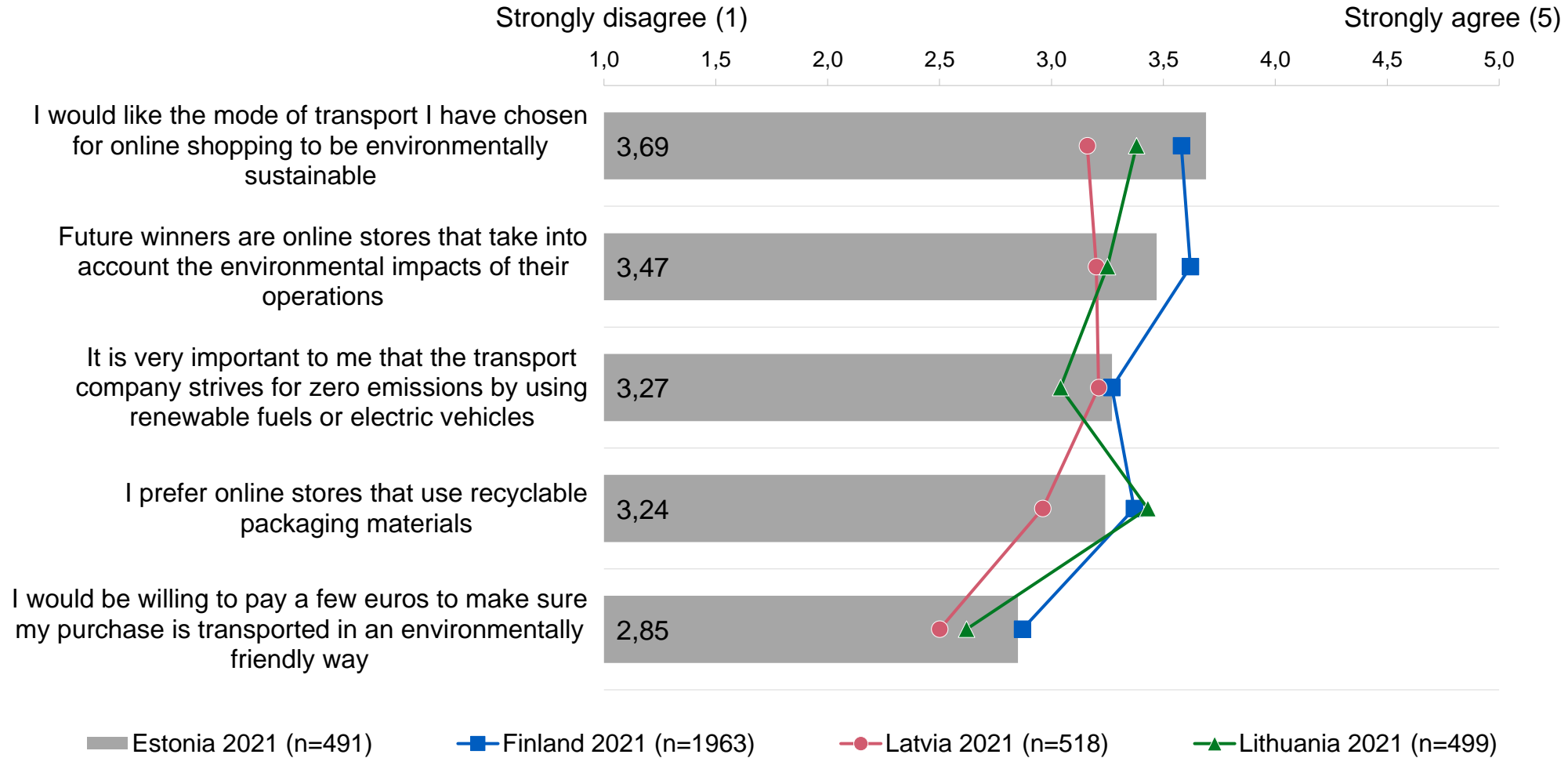


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Estonia 2021 (n=491)

Sustainability

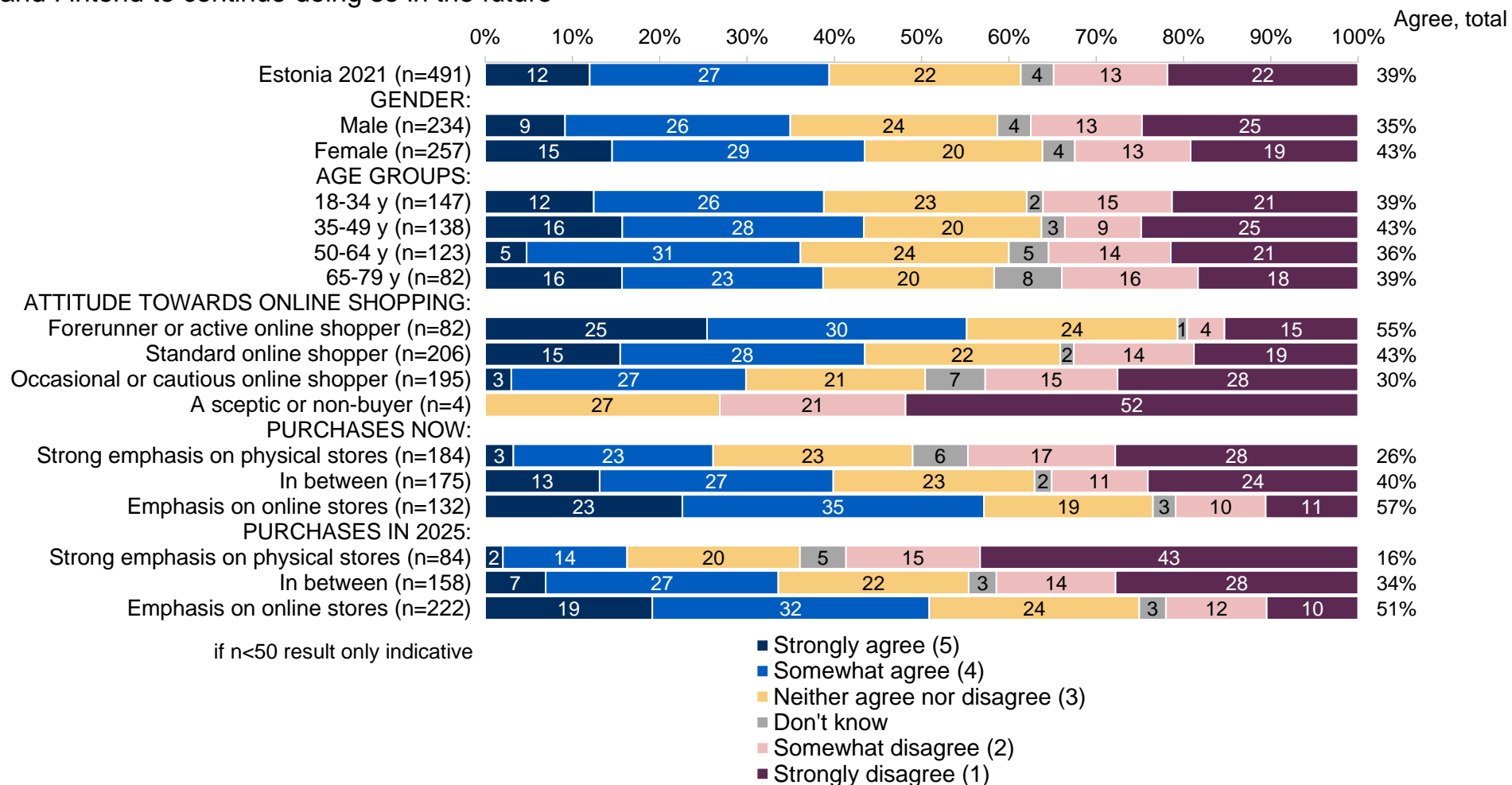
Do you agree or disagree with the following statements?



Impact of COVID-19

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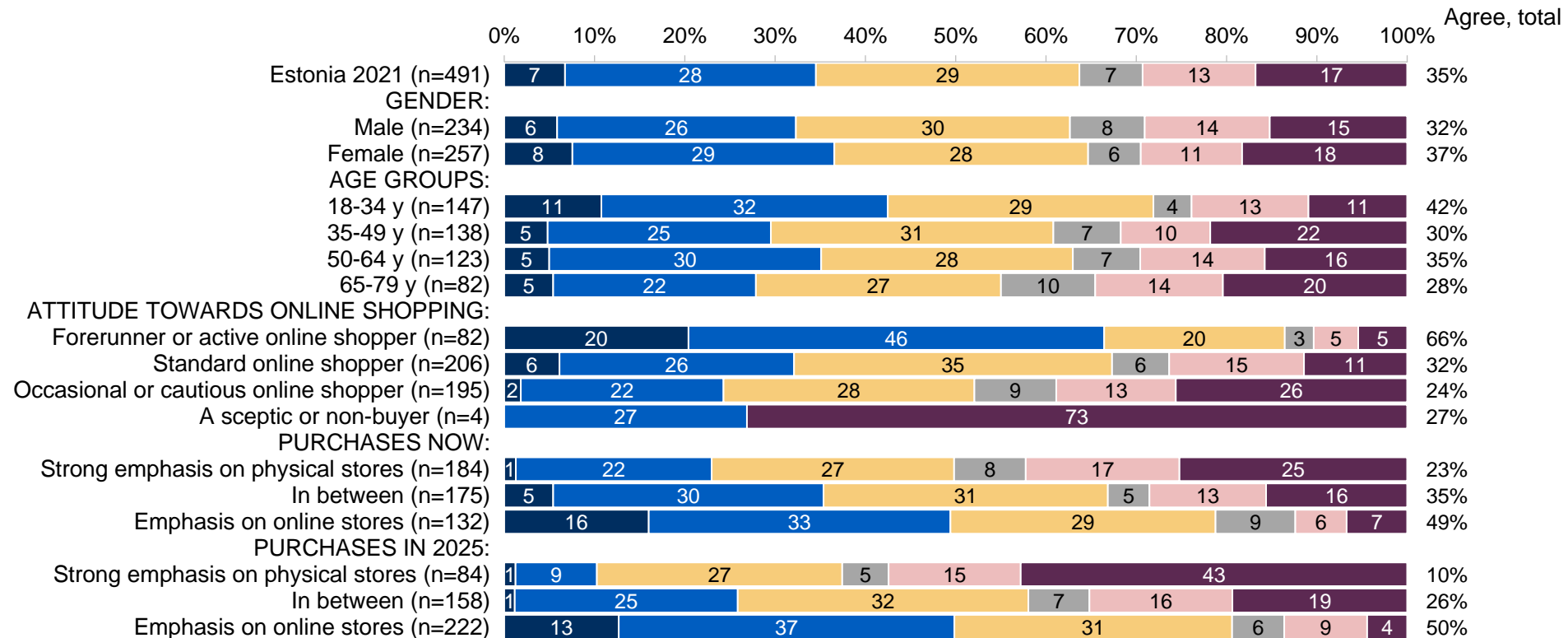
Due to the coronavirus crisis, I learned to buy groceries and convenience products online to simplify my everyday life and I intend to continue doing so in the future



Impact of COVID-19

Do you agree or disagree with the following statements?

In future, I will shop online more than before the crisis



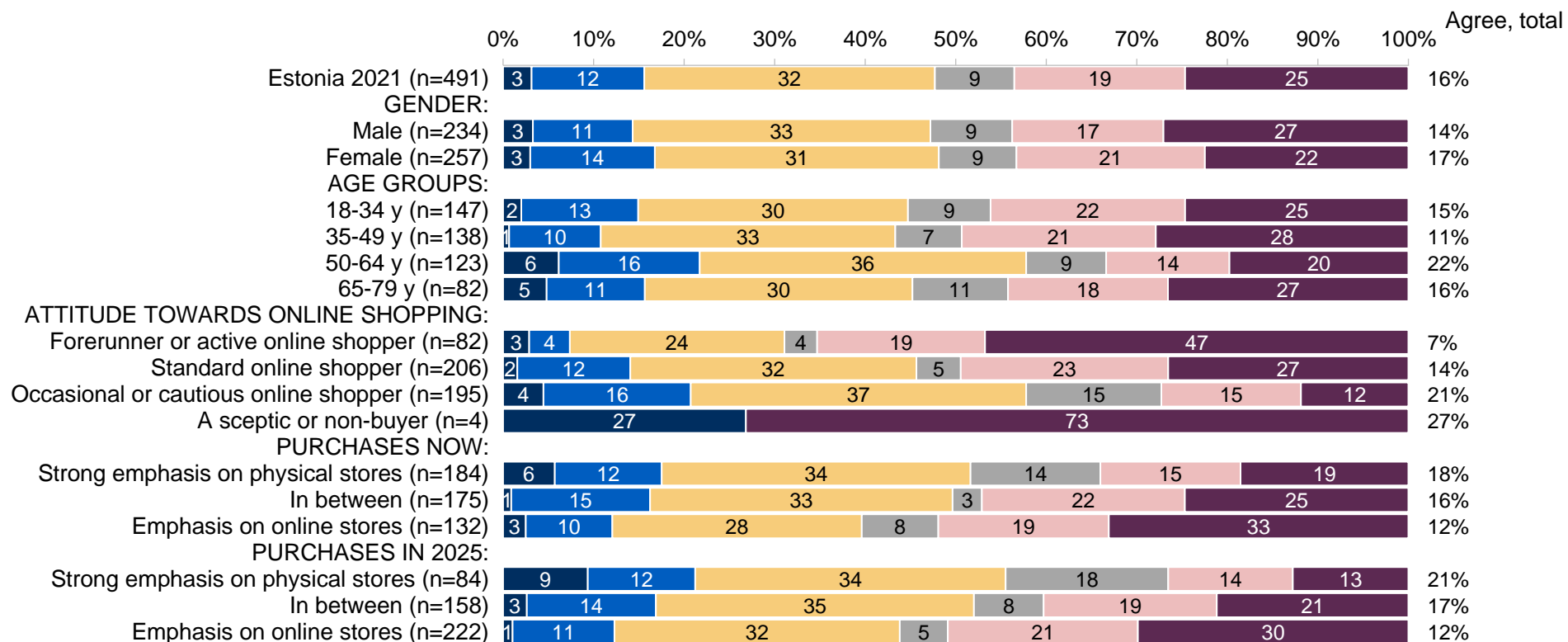
if n<50 result only indicative

- Strongly agree (5)
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- Neither agree nor disagree (3)
- Don't know
- Somewhat disagree (2)
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Impact of COVID-19

Do you agree or disagree with the following statements?

I will significantly reduce my purchases of goods online as soon as the corona crisis is over



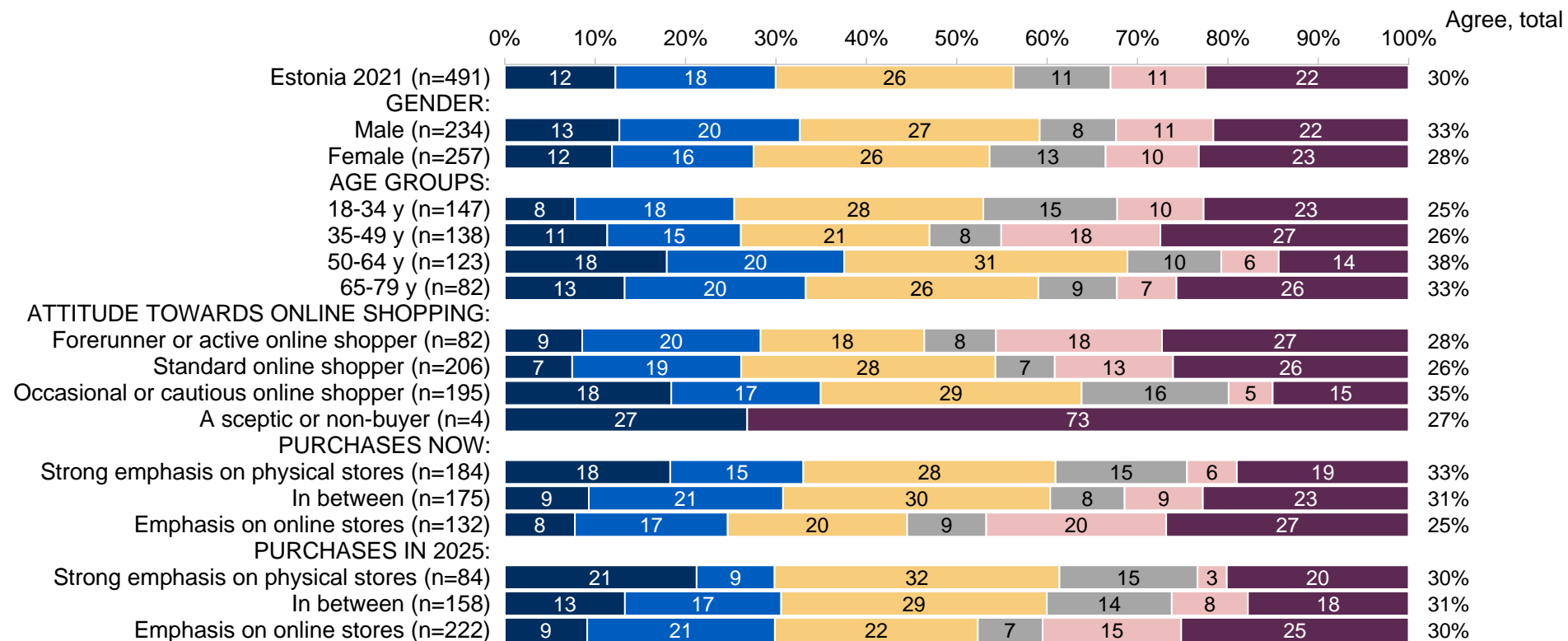
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- Neither agree nor disagree (3)
- Don't know
- Somewhat disagree (2)
- Strongly disagree (1)

Impact of COVID-19

Do you agree or disagree with the following statements?

I will significantly reduce the purchase of food and groceries online as soon as the corona crisis is over



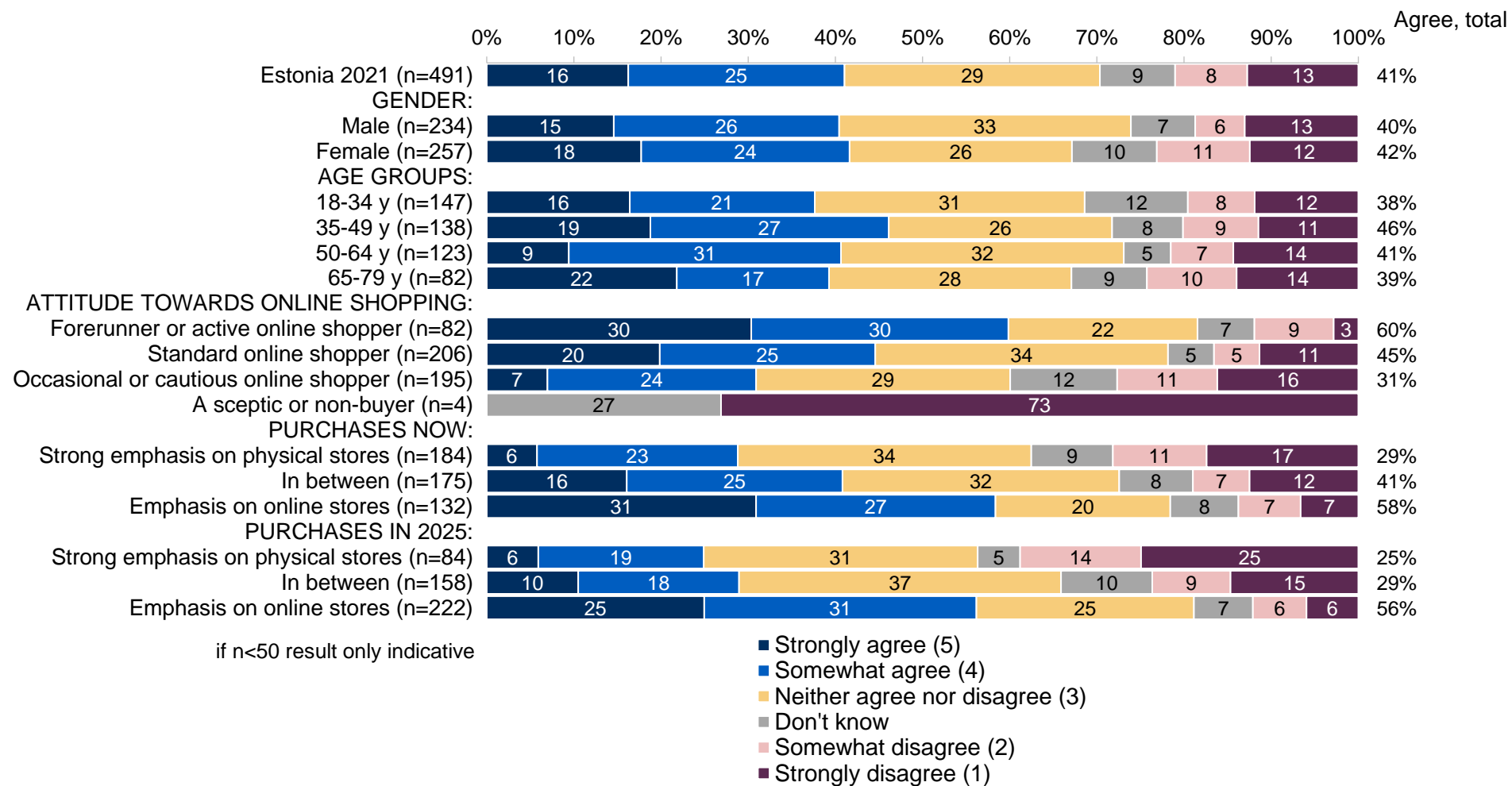
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Impact of COVID-19

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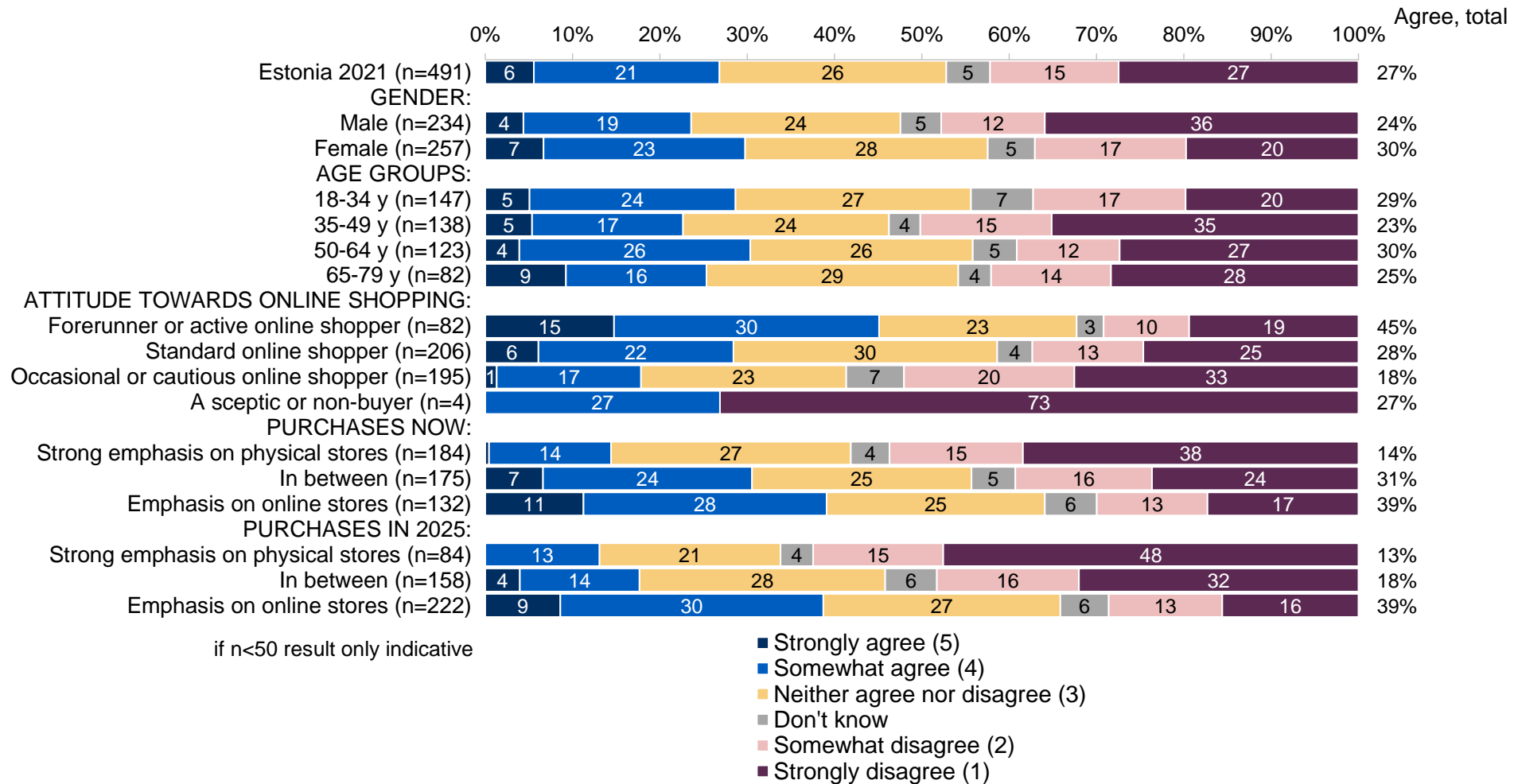
I will definitely continue to use home delivery of online purchases, because I have good experiences of that



Impact of COVID-19

Do you agree or disagree with the following statements?

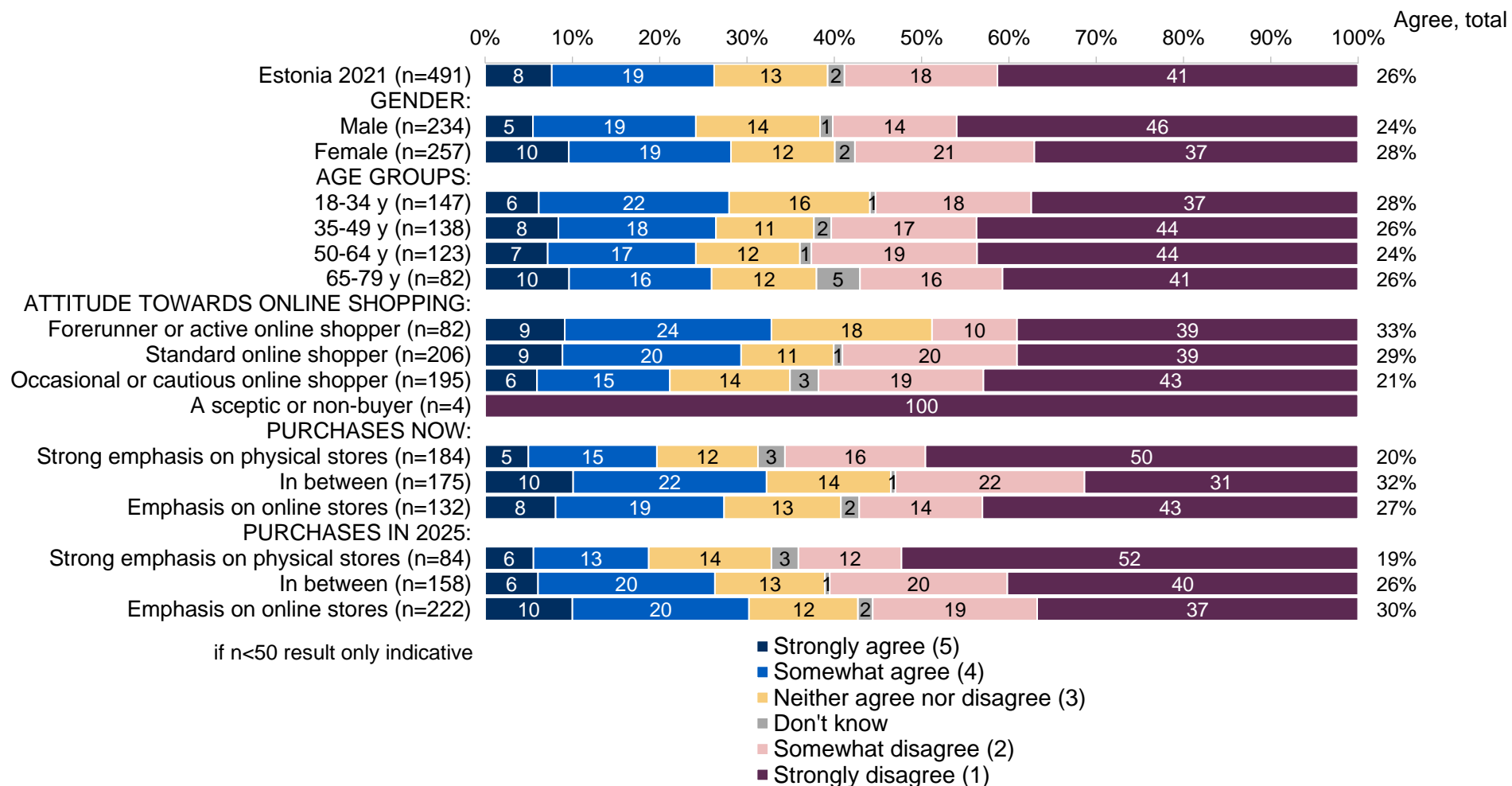
With the corona, online shopping has come into my life to stay



Online shopping motivations

Do you agree or disagree with the following statements?

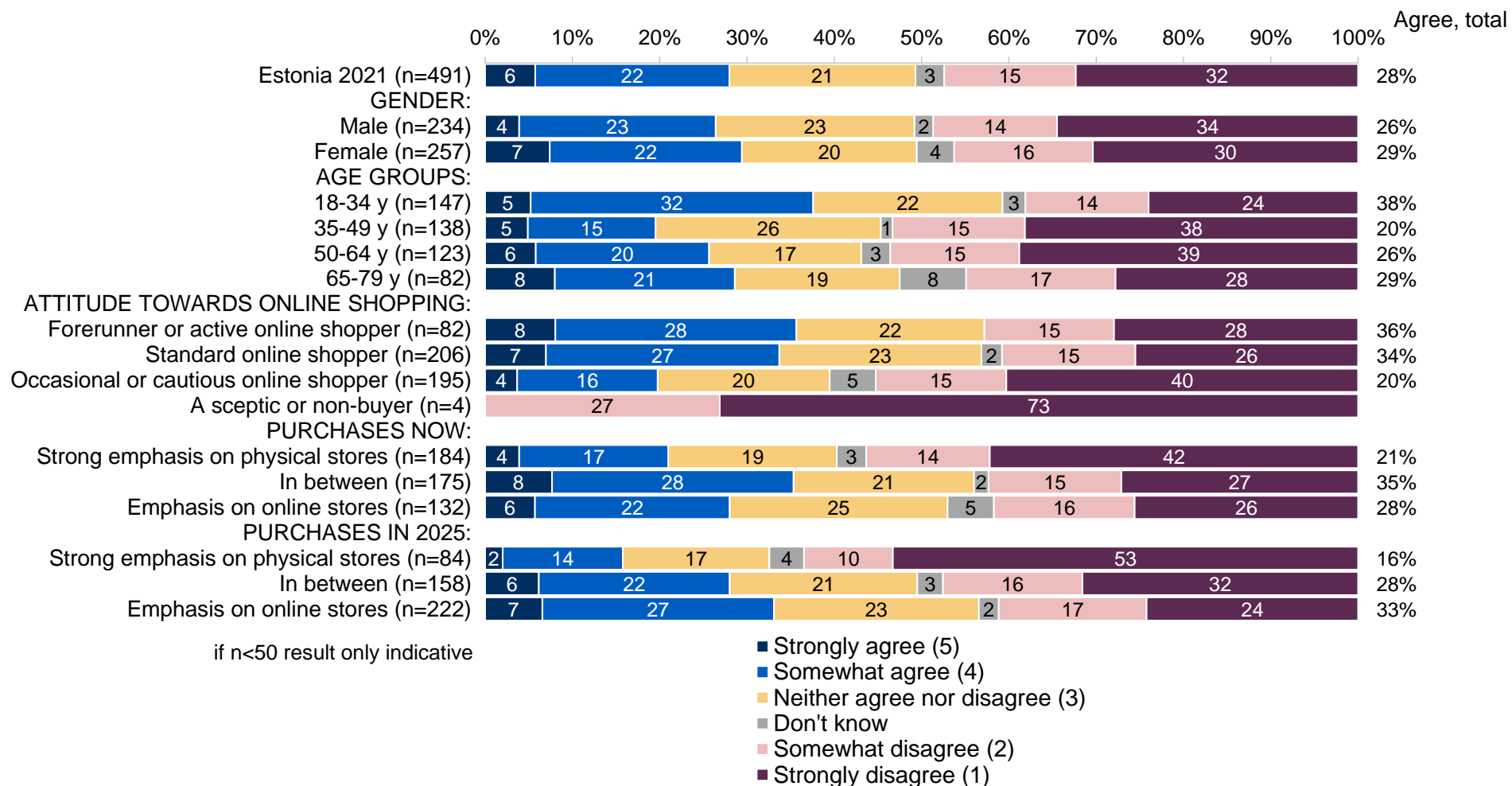
For me the biggest reason for buying goods online, is the fact that I live far from the stores



Online shopping motivations

Do you agree or disagree with the following statements?

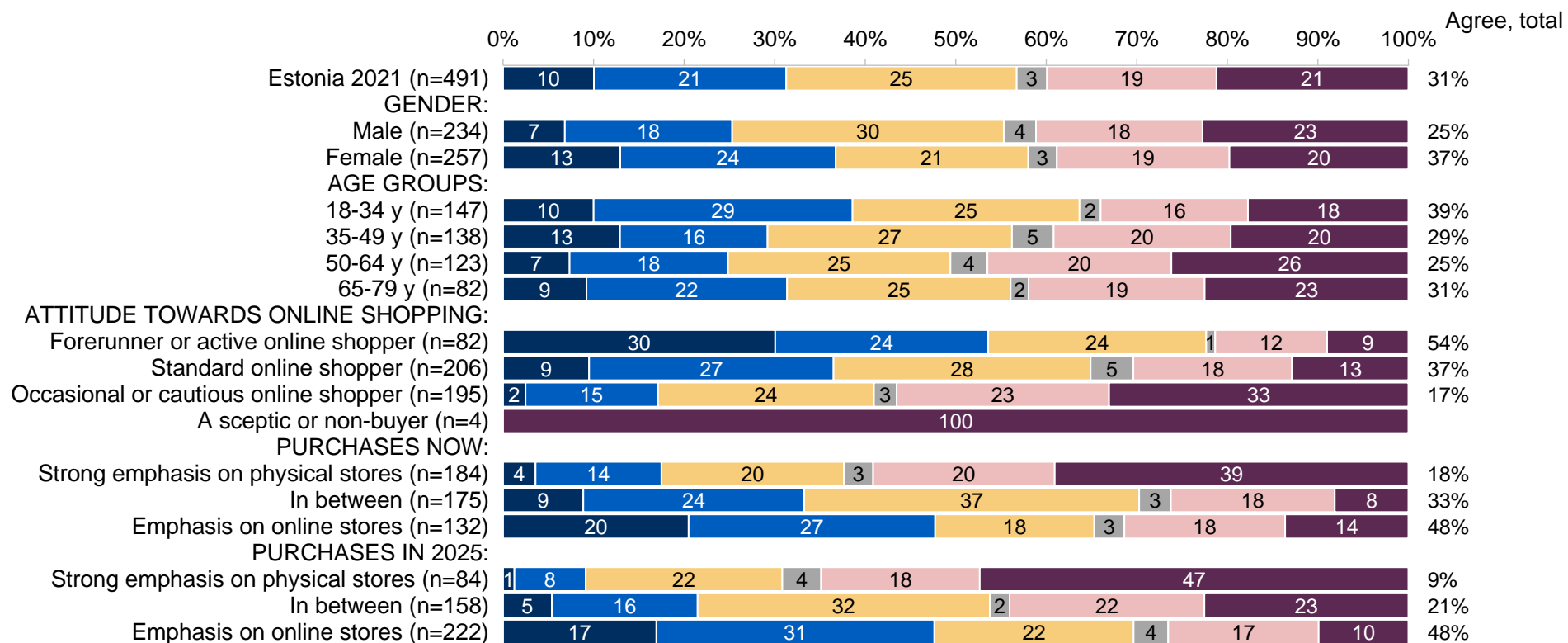
For me the biggest reason for buying goods online, is that I live centrally, close to online shopping pick-up points



Online shopping motivations

Do you agree or disagree with the following statements?

I enjoy online shopping the same way as shopping in brick-and-mortar stores



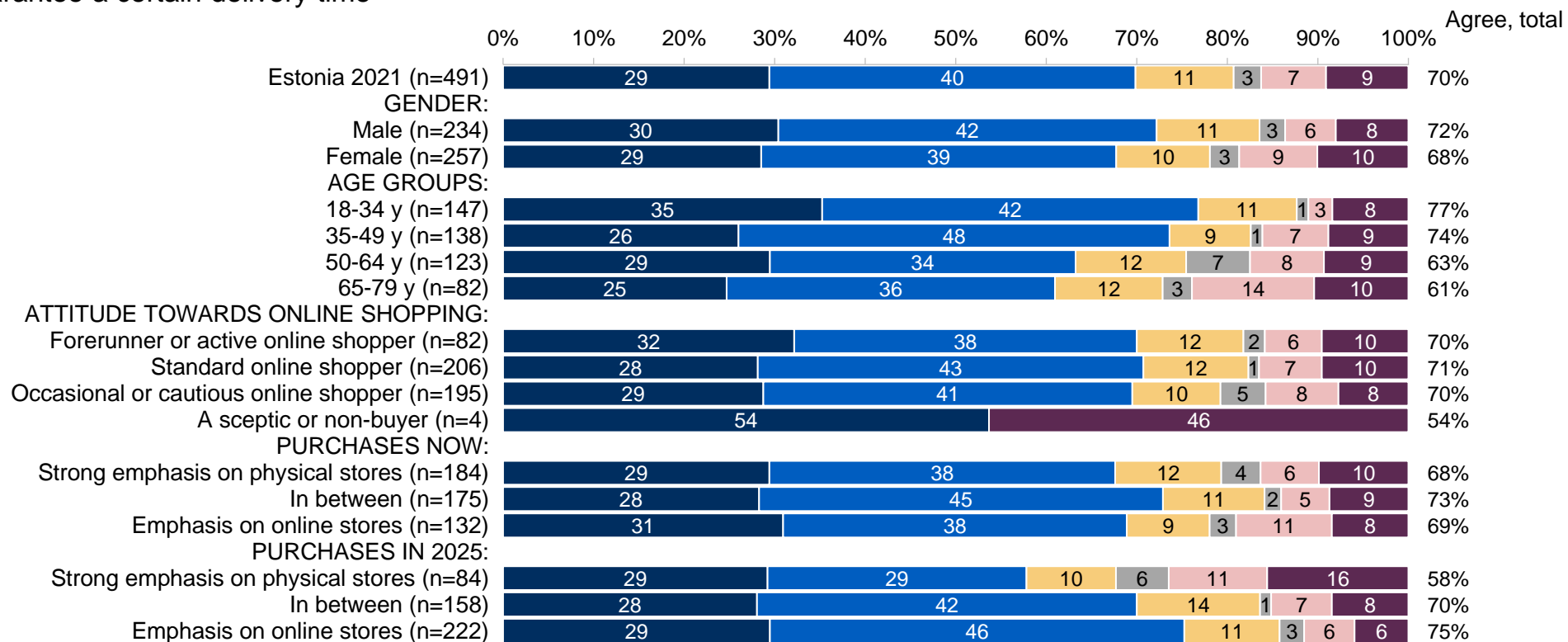
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- Don't know
- Somewhat disagree (2)
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Online shopping motivations

Do you agree or disagree with the following statements?

I buy from brick-and-mortar stores products I need urgently in the next few days, because the online shops don't guarantee a certain delivery time



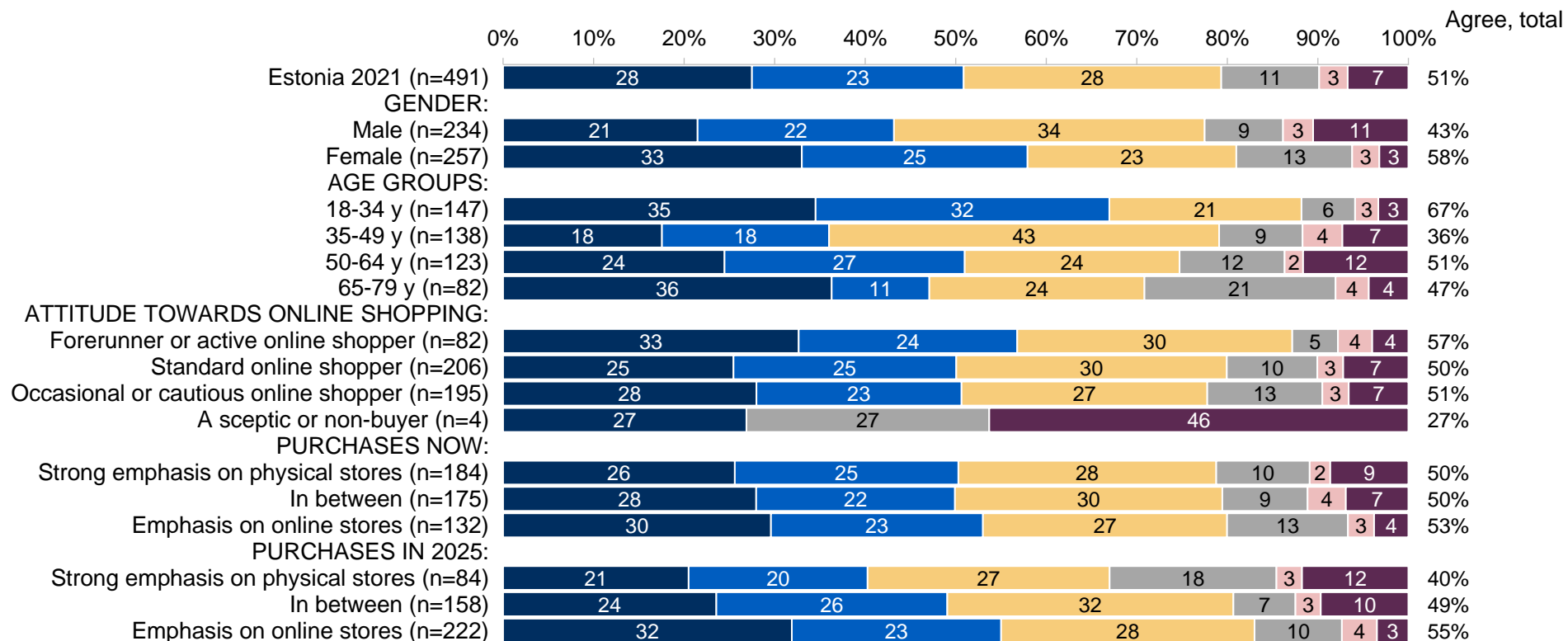
if n<50 result only indicative

- Strongly agree (5)
- Somewhat agree (4)
- Neither agree nor disagree (3)
- Don't know
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Sustainability

Do you agree or disagree with the following statements?

I would like the mode of transport I have chosen for online shopping to be environmentally sustainable



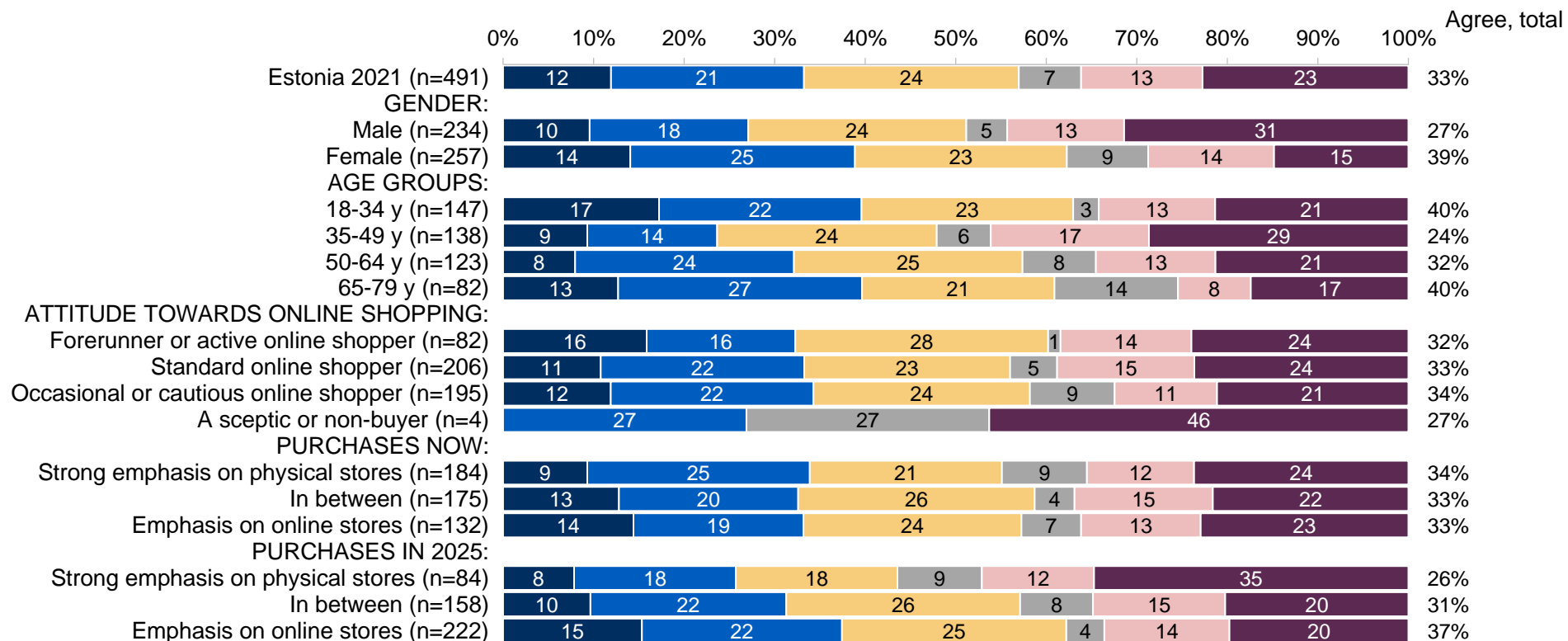
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Sustainability

Do you agree or disagree with the following statements?

I would be willing to pay a few euros to make sure my purchase is transported in an environmentally friendly way



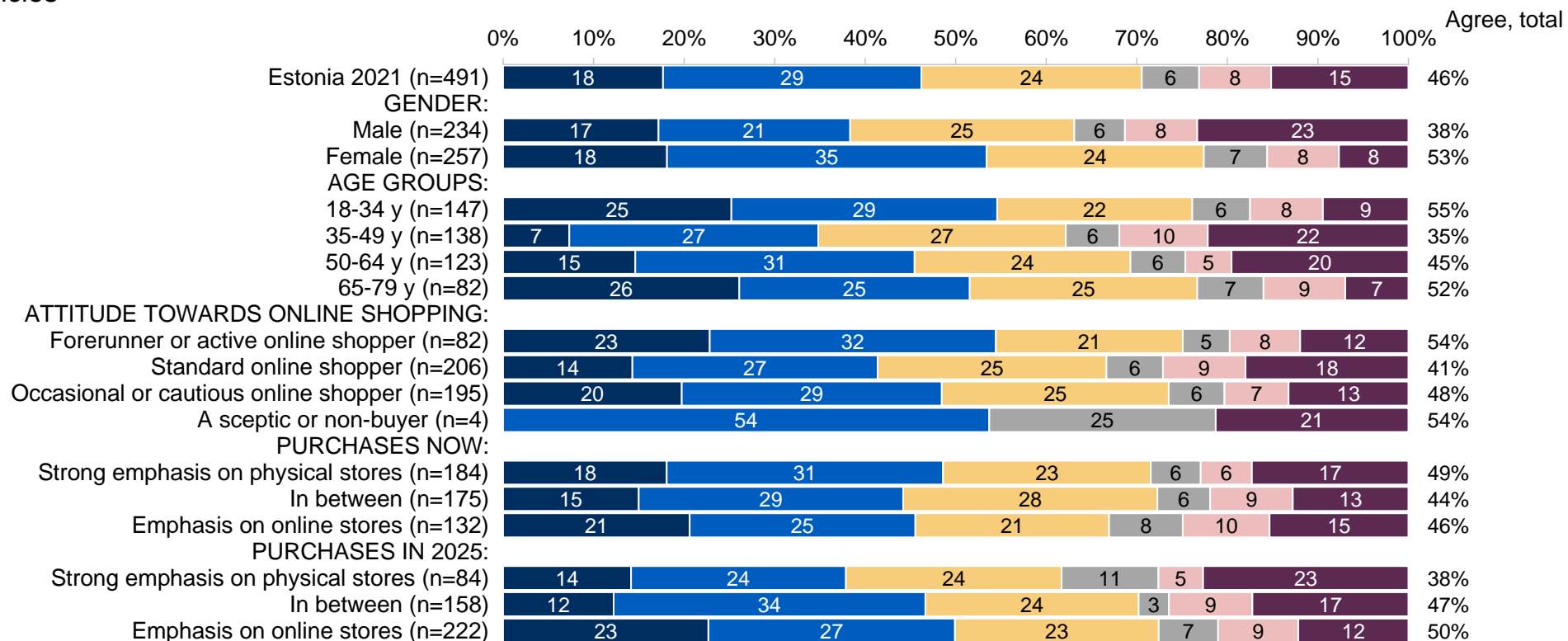
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- Neither agree nor disagree (3)
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- Somewhat disagree (2)
- Strongly disagree (1)

Sustainability

Do you agree or disagree with the following statements?

It is very important to me that the transport company strives for zero emissions by using renewable fuels or electric vehicles



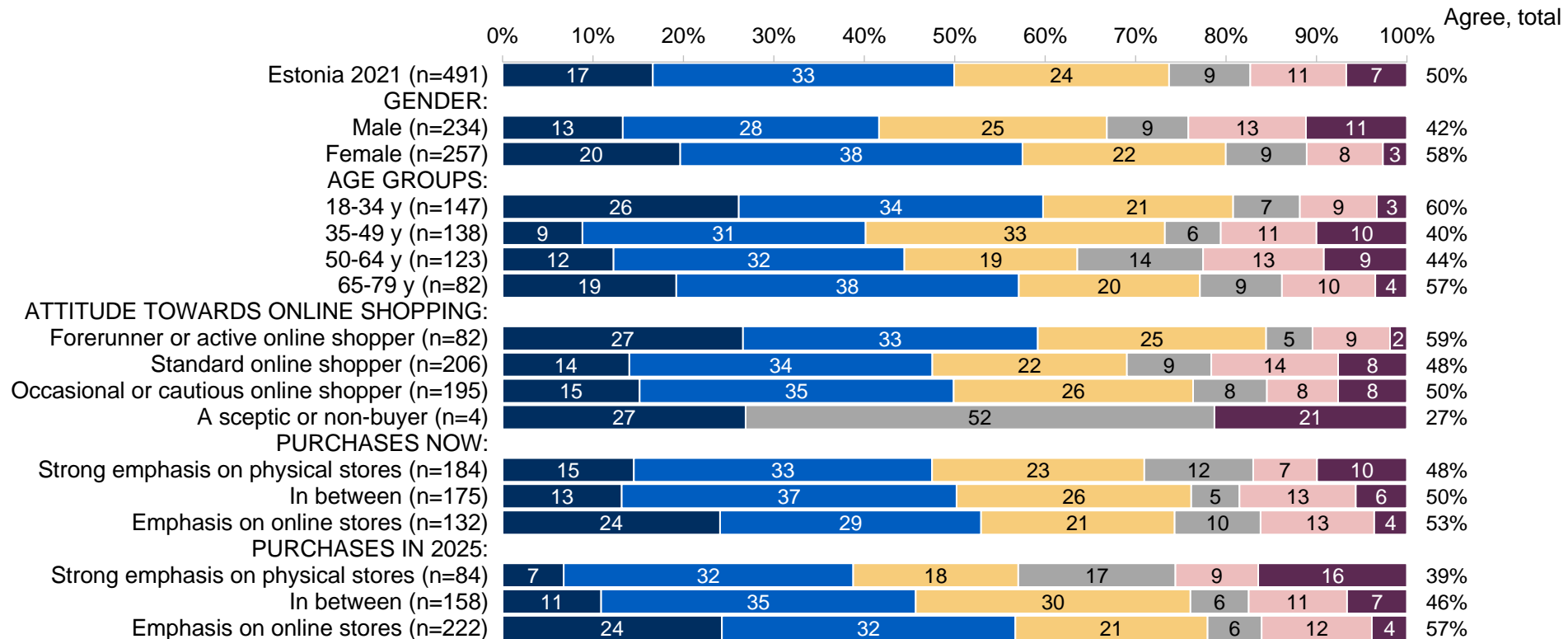
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Sustainability

Do you agree or disagree with the following statements?

Future winners are online stores that take into account the environmental impacts of their operations



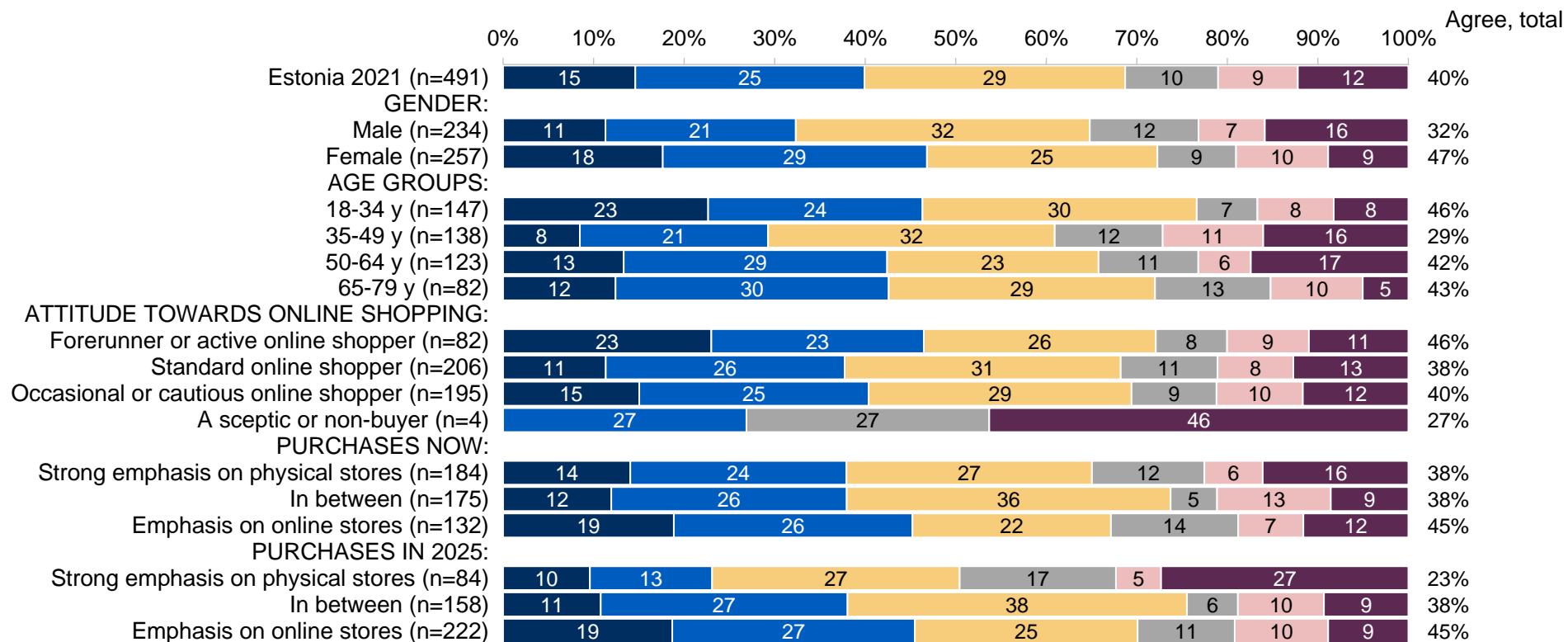
if n<50 result only indicative

- Strongly agree (5)
- Somewhat agree (4)
- Neither agree nor disagree (3)
- Don't know
- Somewhat disagree (2)
- Strongly disagree (1)

Sustainability

Do you agree or disagree with the following statements?

I prefer online stores that use recyclable packaging materials

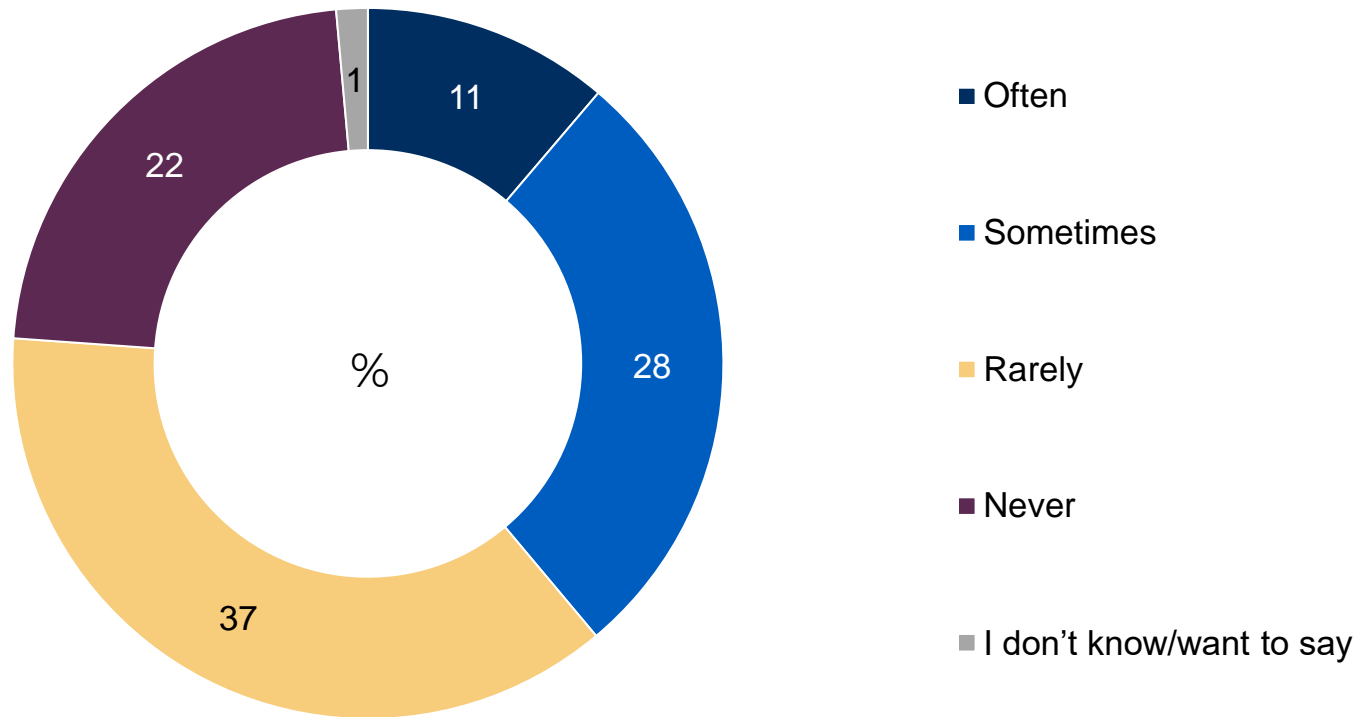


if n<50 result only indicative

- Strongly agree (5)
- Somewhat agree (4)
- Neither agree nor disagree (3)
- Don't know
- Somewhat disagree (2)
- Strongly disagree (1)

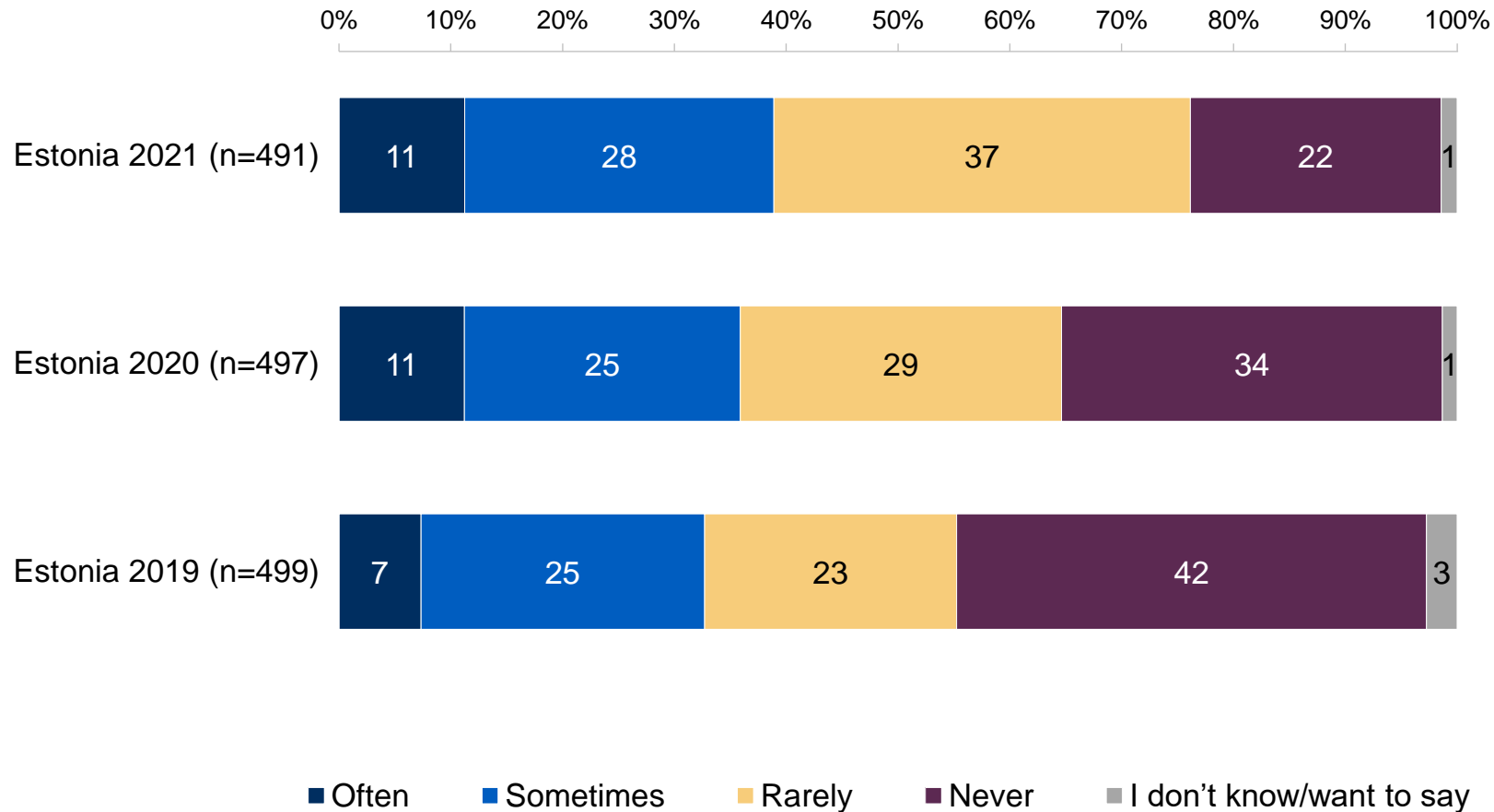
Online purchasing habits

How often have you put additional products into your shopping basket in order to get a free delivery when the order total exceeds a certain amount?

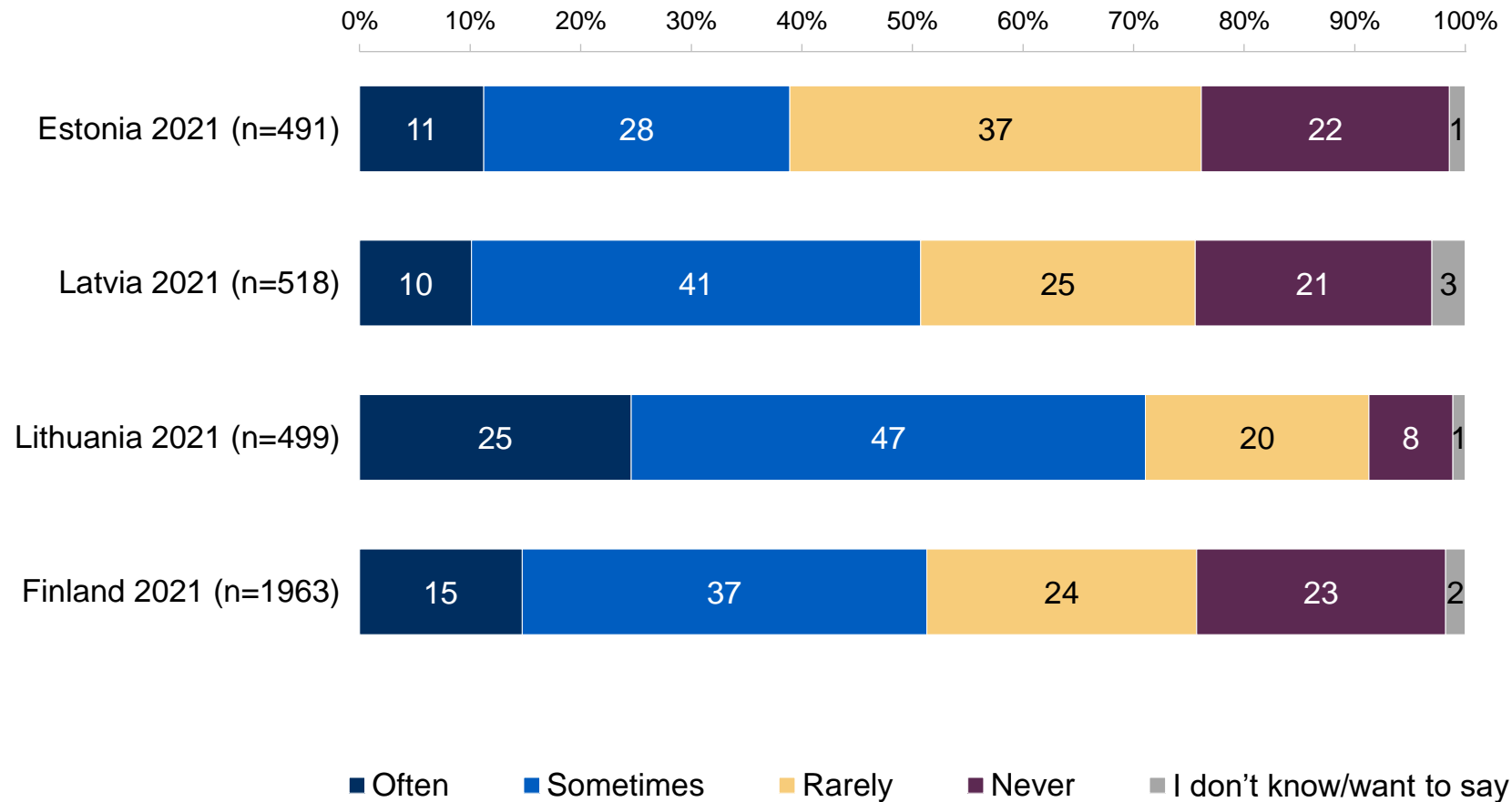


Estonia 2021 (n=491)

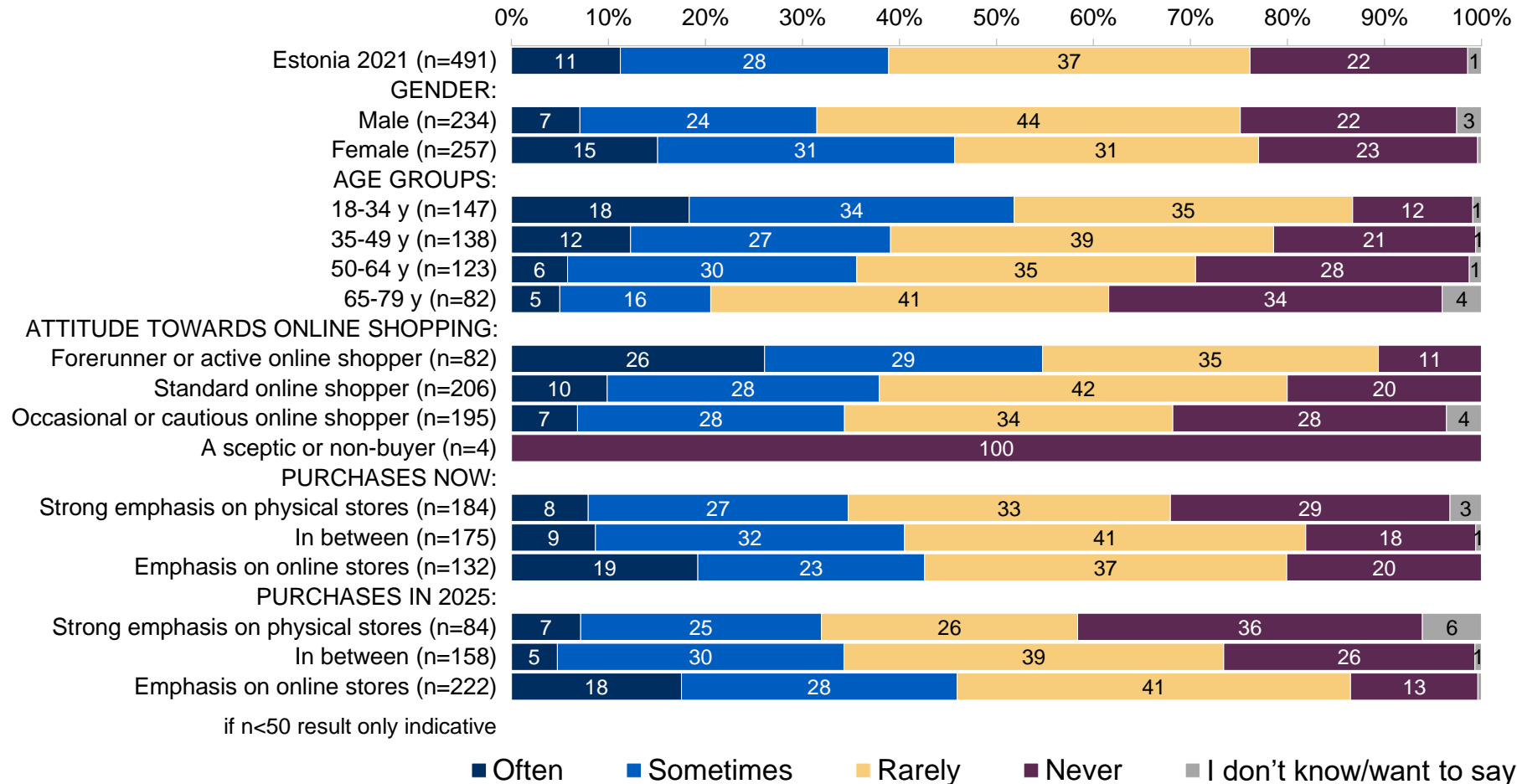
How often have you put additional products into your shopping basket in order to get a free delivery when the order total exceeds a certain amount?



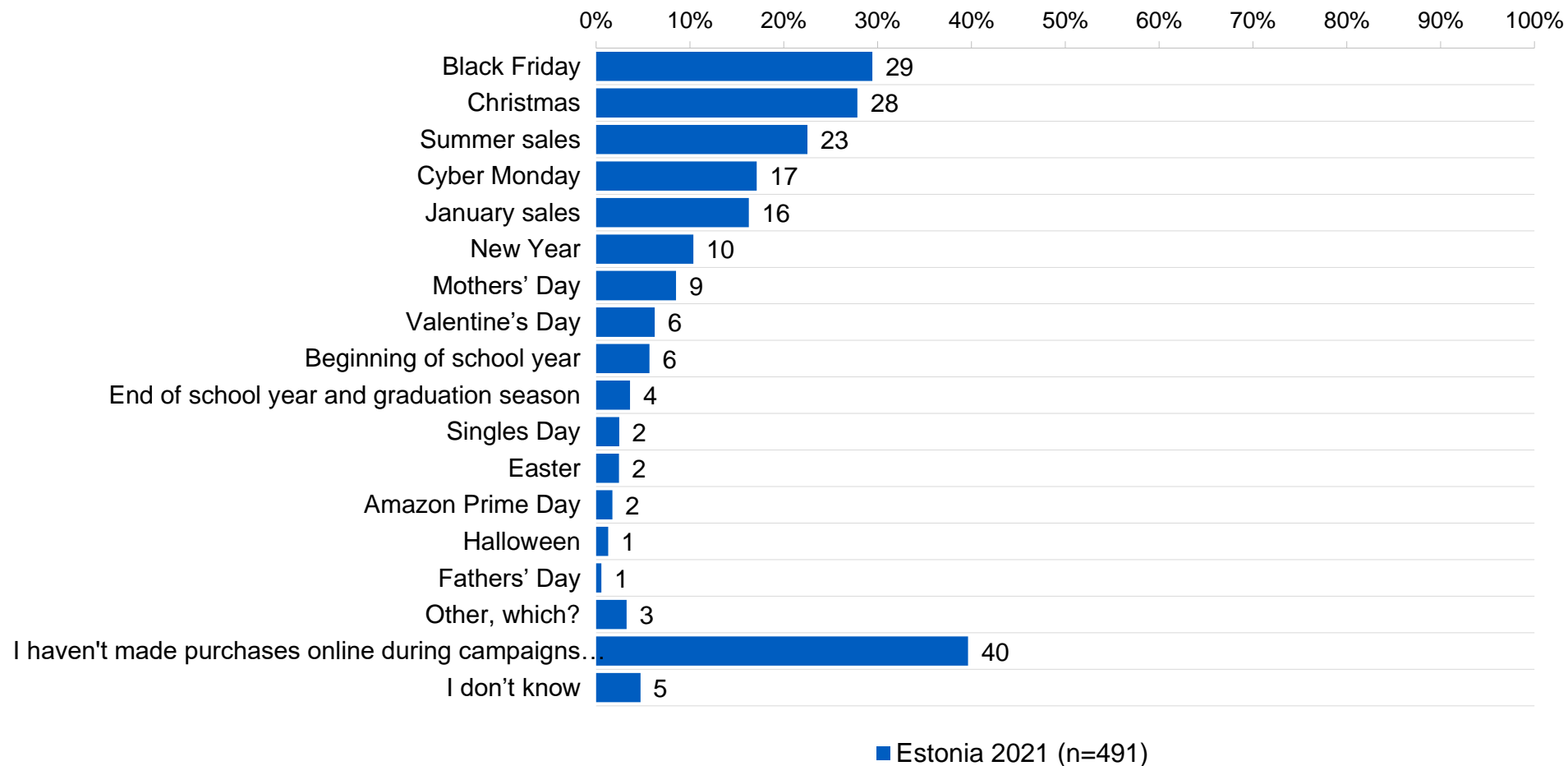
How often have you put additional products into your shopping basket in order to get a free delivery when the order total exceeds a certain amount?



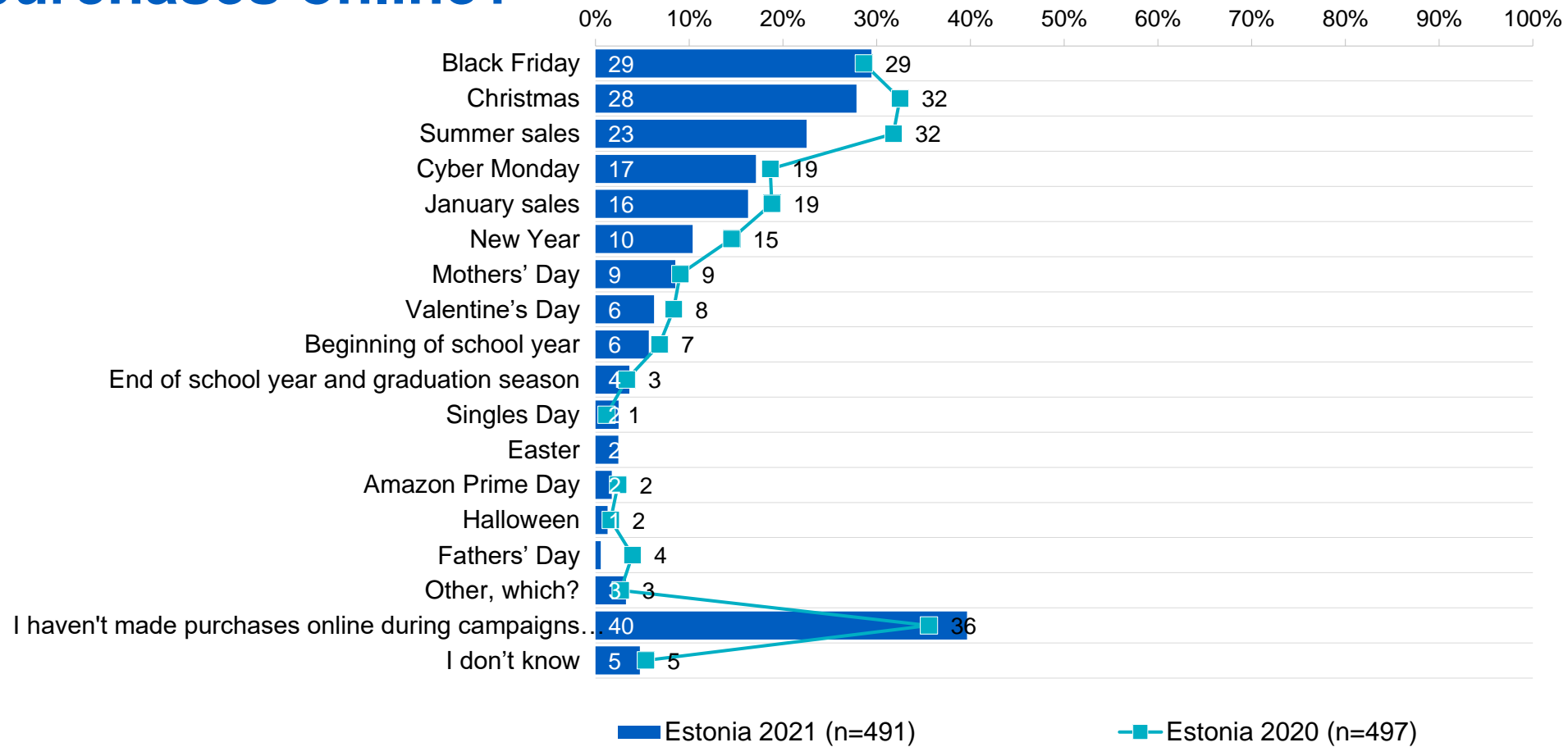
How often have you put additional products into your shopping basket in order to get a free delivery when the order total exceeds a certain amount?



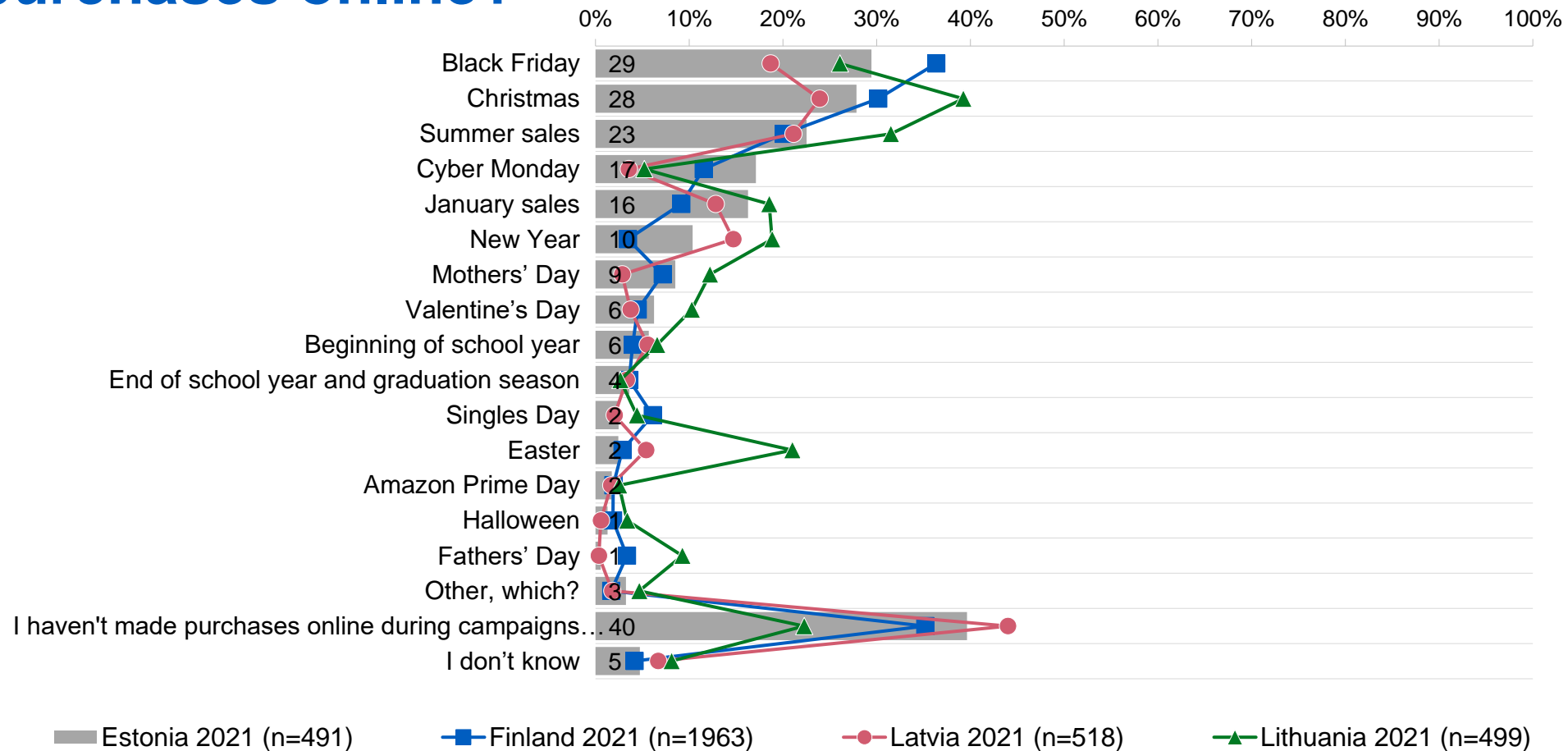
During which of the following e-commerce campaigns or other seasons have you made purchases online?



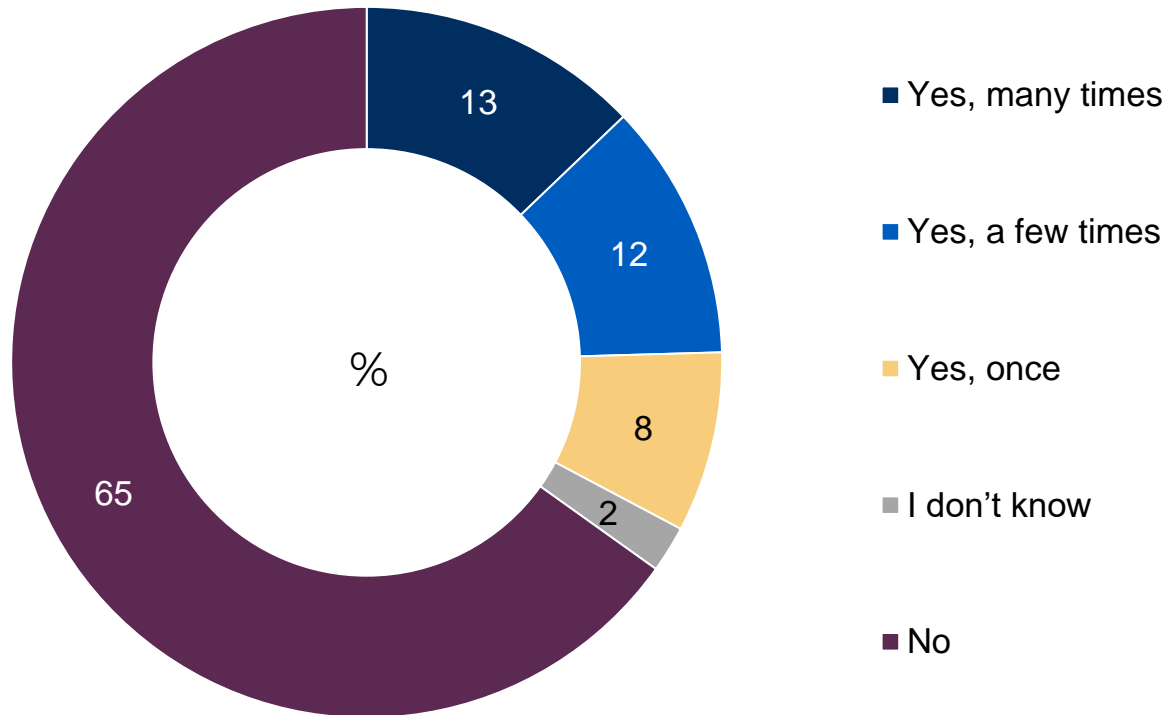
During which of the following e-commerce campaigns or other seasons have you made purchases online?



During which of the following e-commerce campaigns or other seasons have you made purchases online?

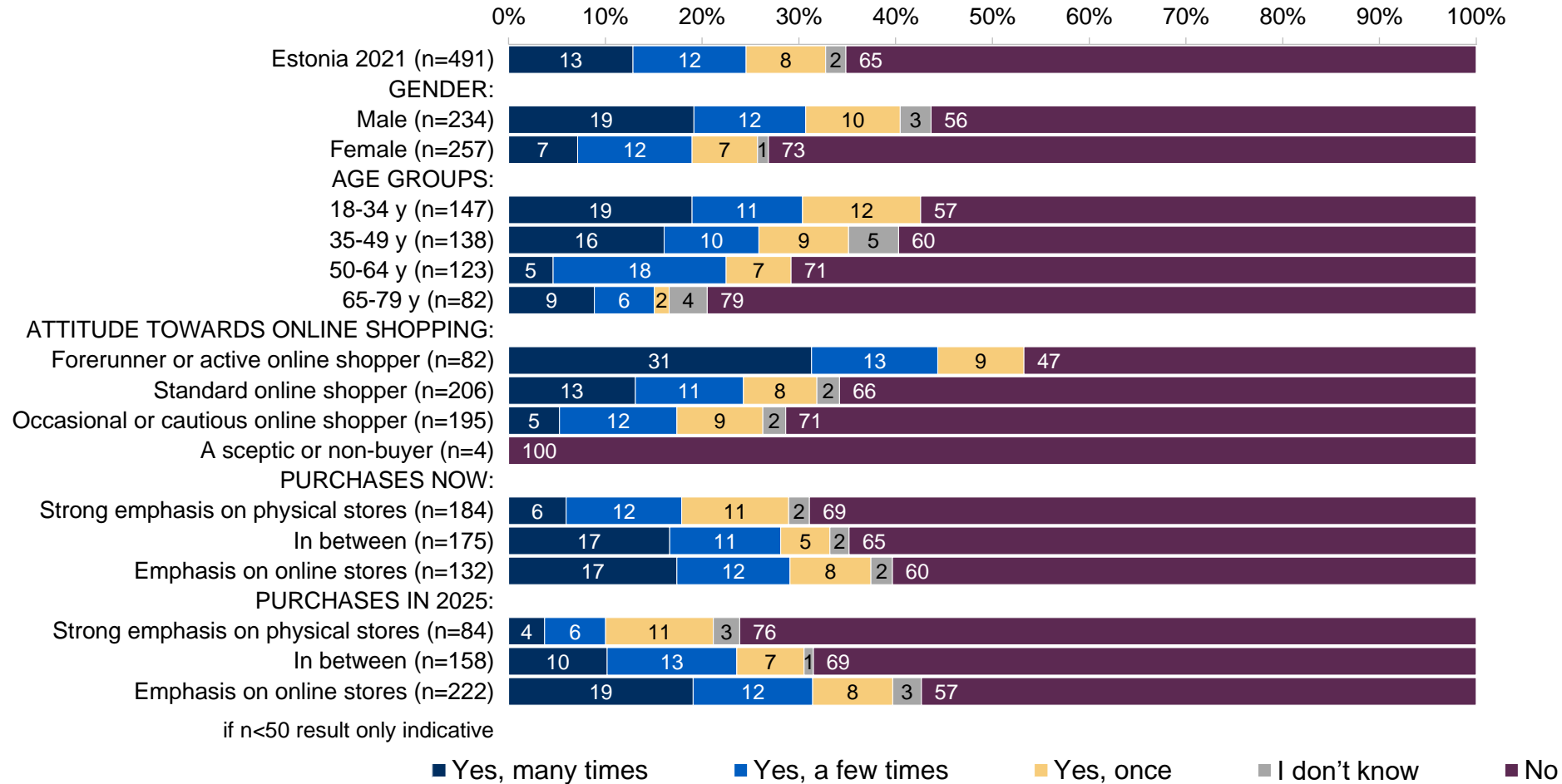


Have you bought any products from Amazon? No matter which country's Amazon

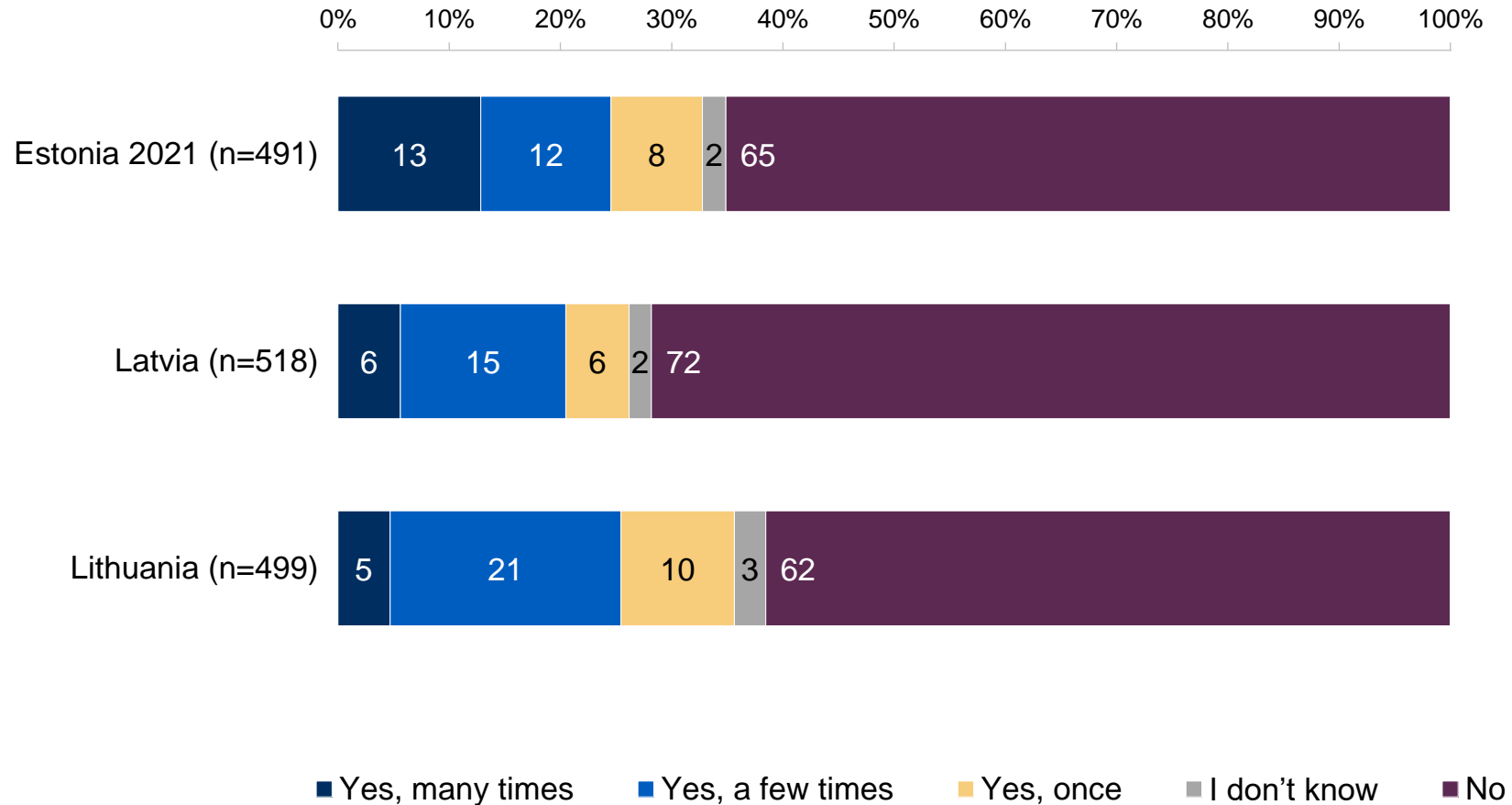


Estonia 2021 (n=491)

Have you bought any products from Amazon? No matter which country's Amazon

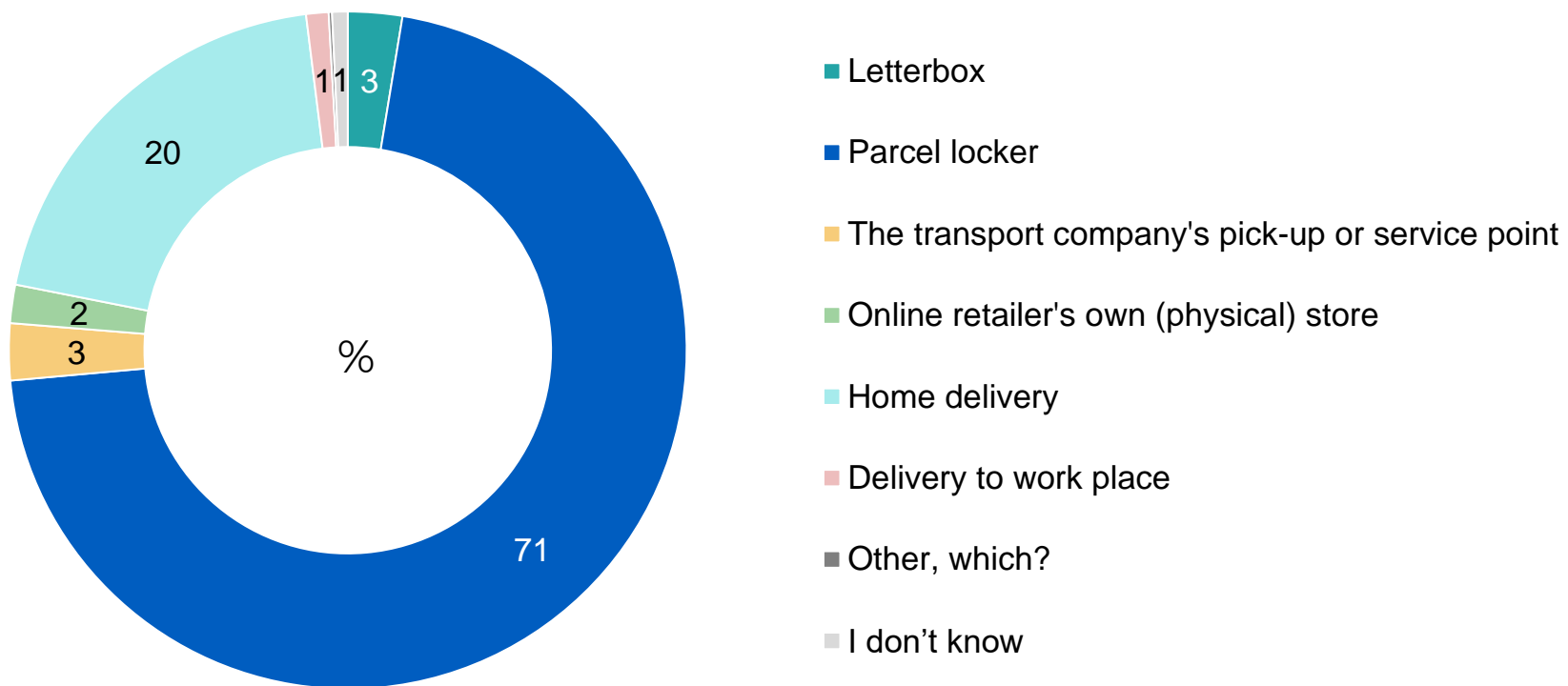


Have you bought any products from Amazon? No matter which country's Amazon



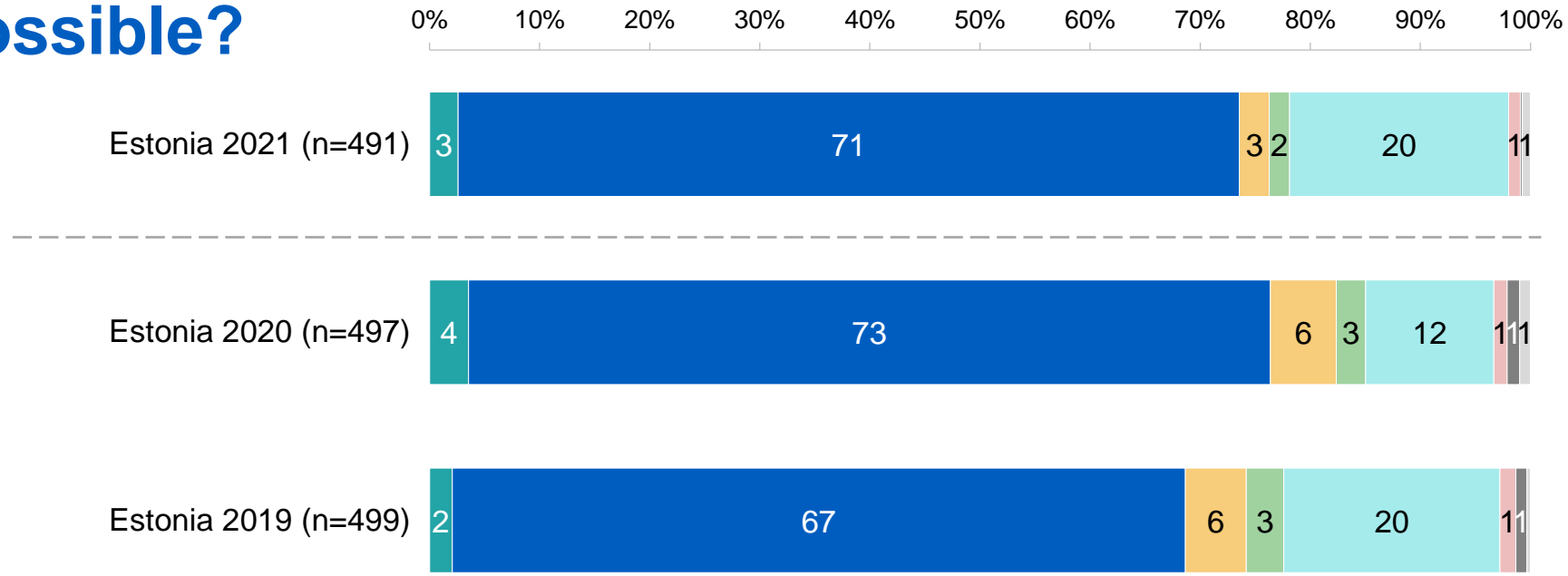
Delivery methods and transport companies

Which delivery method do you prefer when shopping online: where do you prefer to receive your goods, if possible?



Estonia 2021 (n=491)

Which delivery method do you prefer when shopping online: where do you prefer to receive your goods, if possible?



Please note: The question changed, annual comparison indicative only.

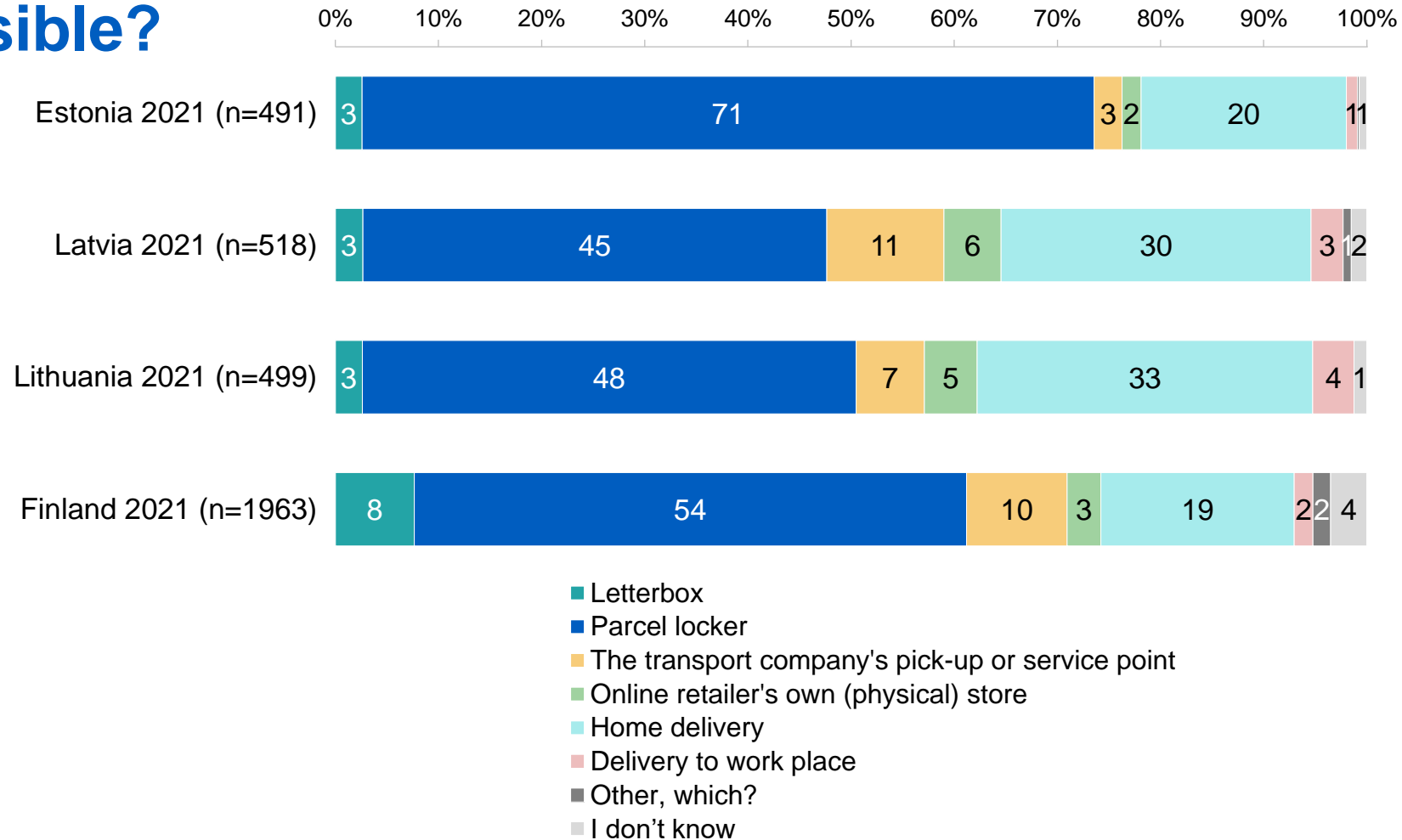
2021: The transport company's pick-up or service point
 2020: Service point (transport company's point or Posti)
 2019: Posti or transport company service point

2021: Home delivery
 2019-2020: Home delivery at a specified time

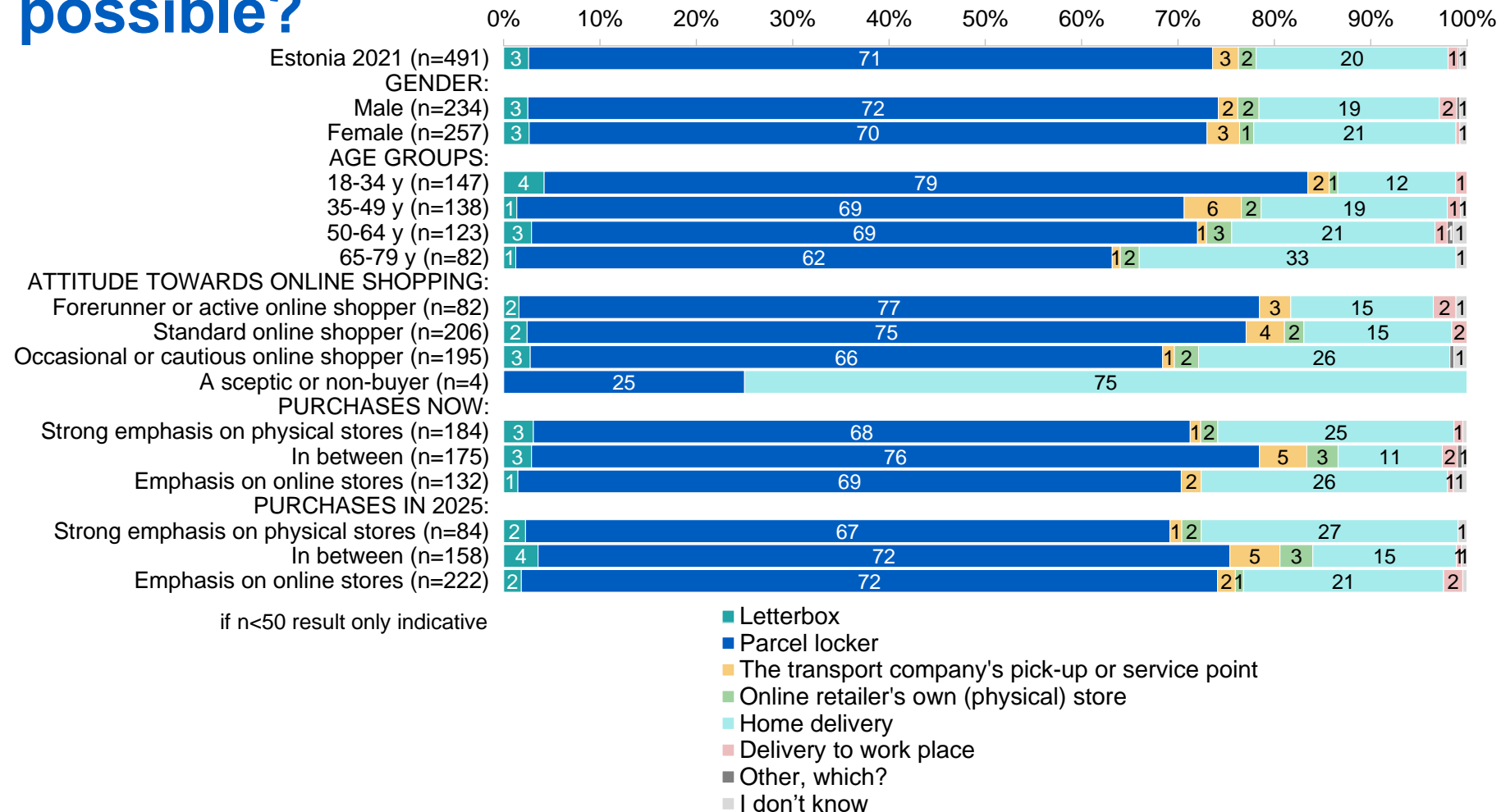
2021: Delivery to work place
 2019-2020: Delivery to work place at a specified time

- Letterbox
- Parcel locker
- The transport company's pick-up or service point
- Online retailer's own (physical) store
- Home delivery
- Delivery to work place
- Other, which?
- I don't know

Which delivery method do you prefer when shopping online: where do you prefer to receive your goods, if possible?

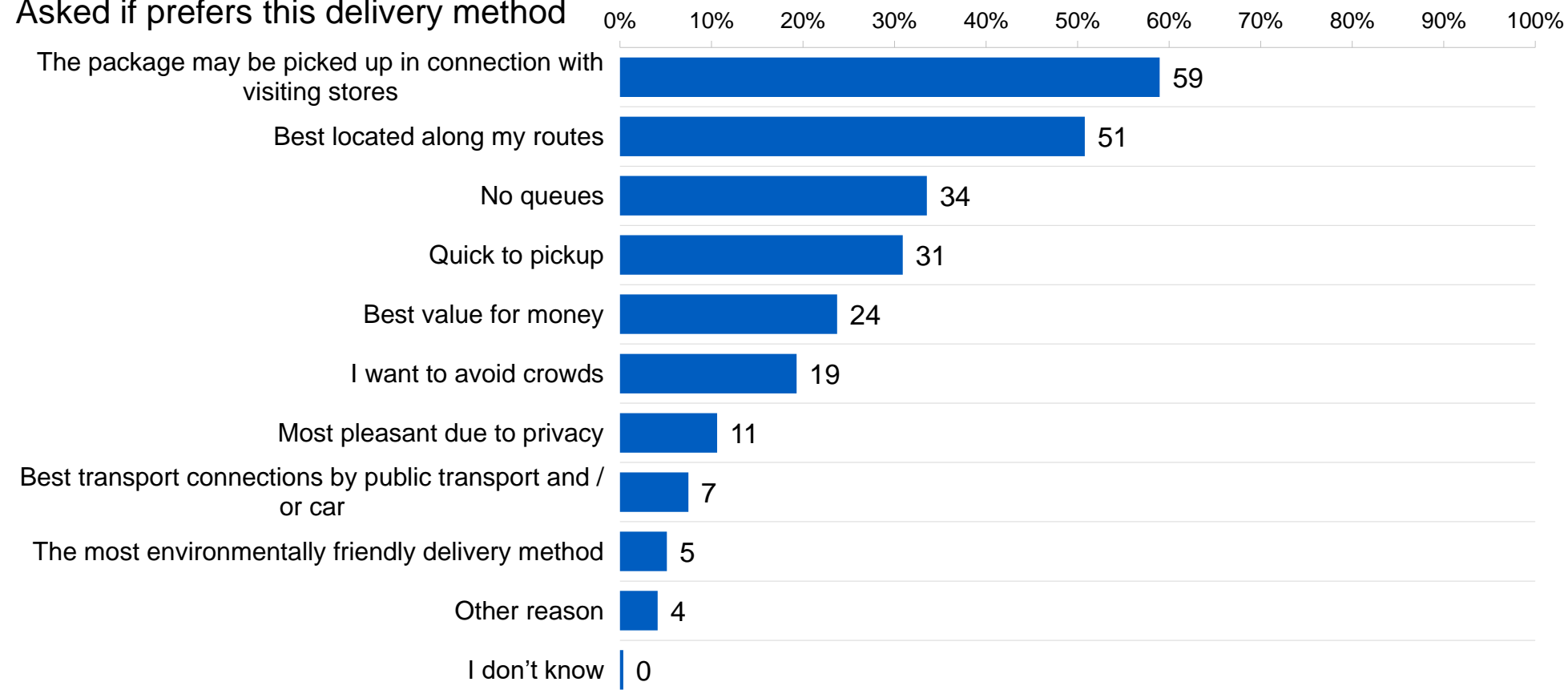


Which delivery method do you prefer when shopping online: where do you prefer to receive your goods, if possible?



Why is a parcel locker your preferred delivery method?

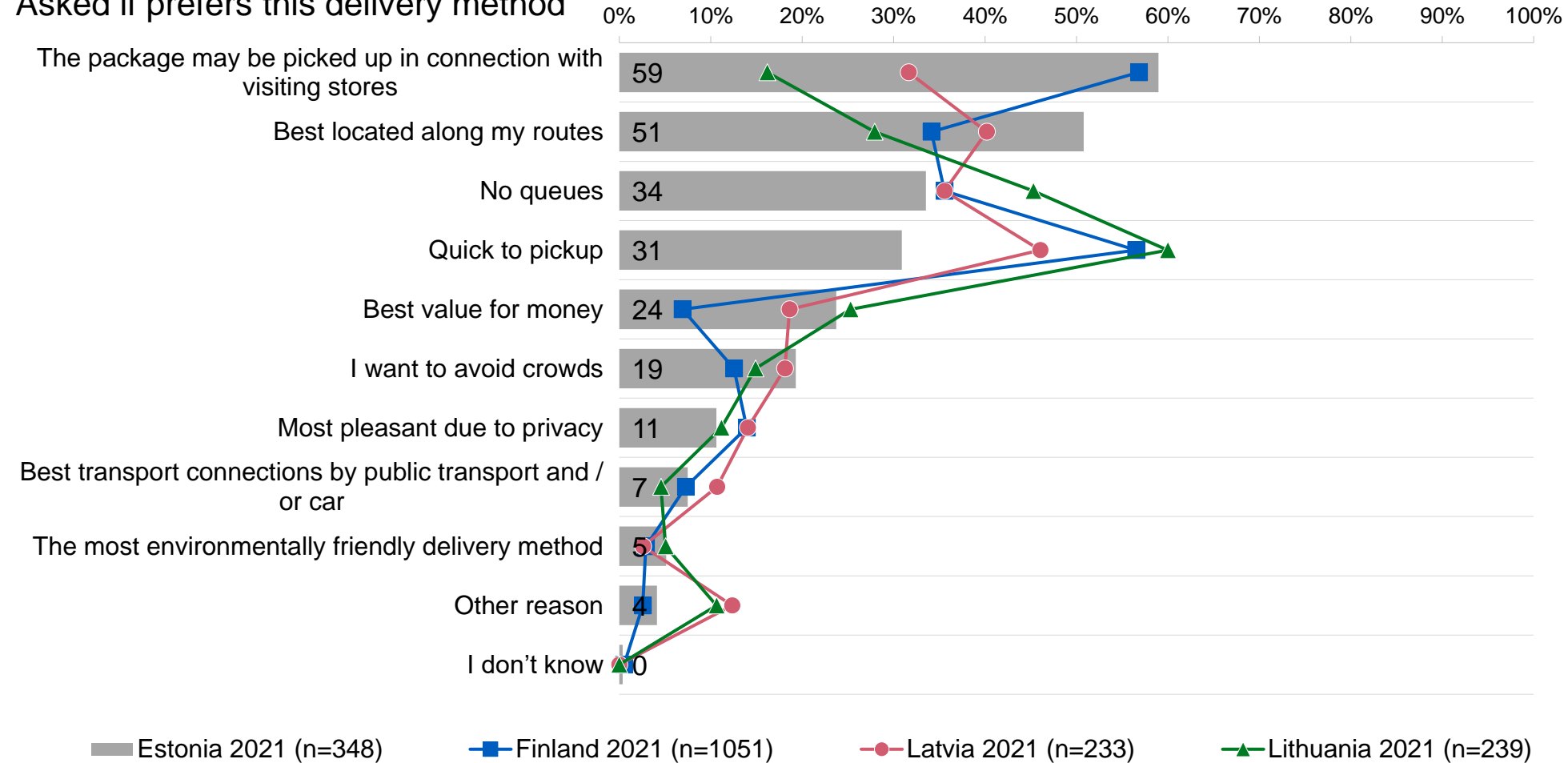
Asked if prefers this delivery method



■ Estonia 2021 (n=348)

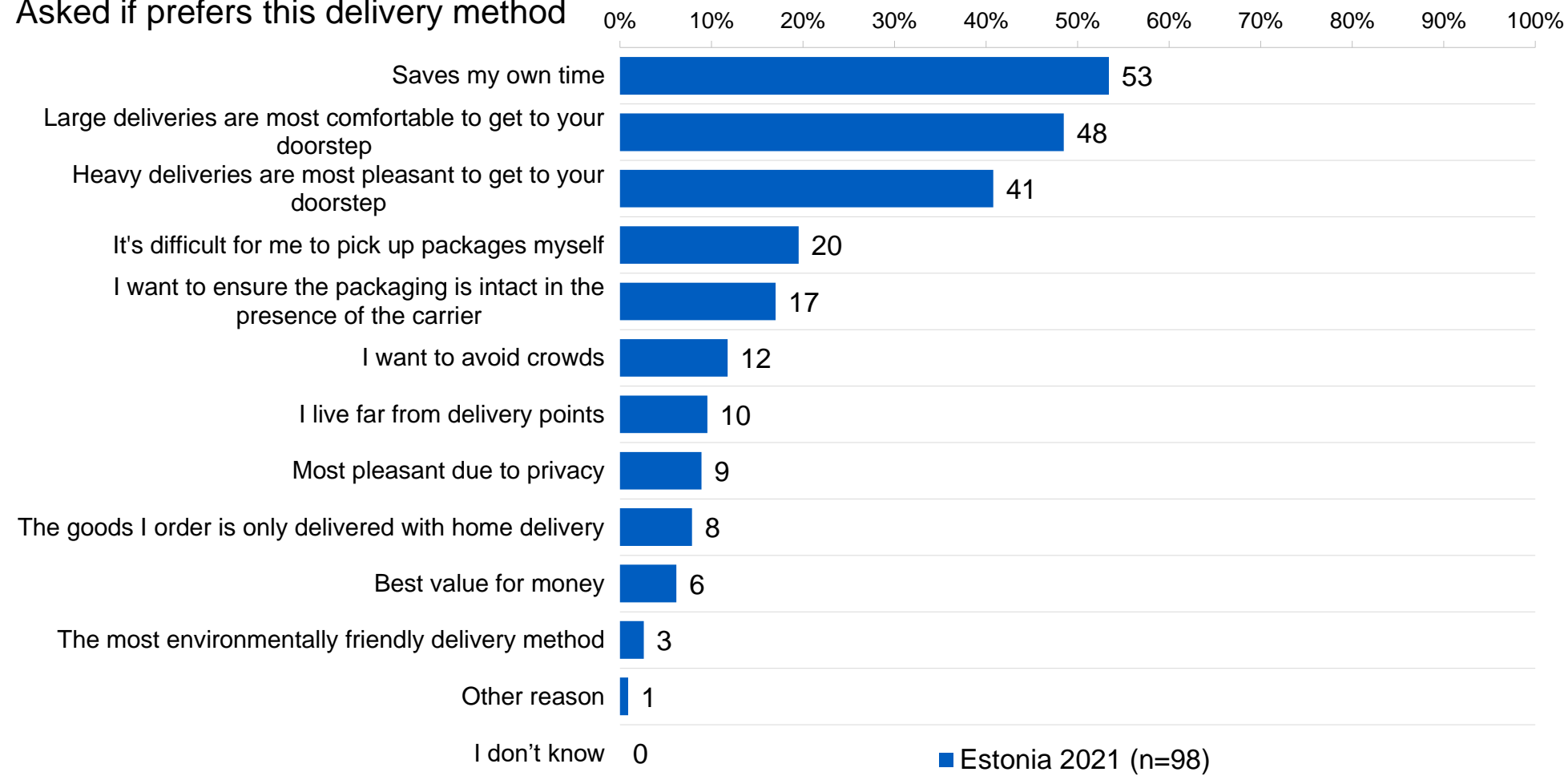
Why is a parcel locker your preferred delivery method?

Asked if prefers this delivery method



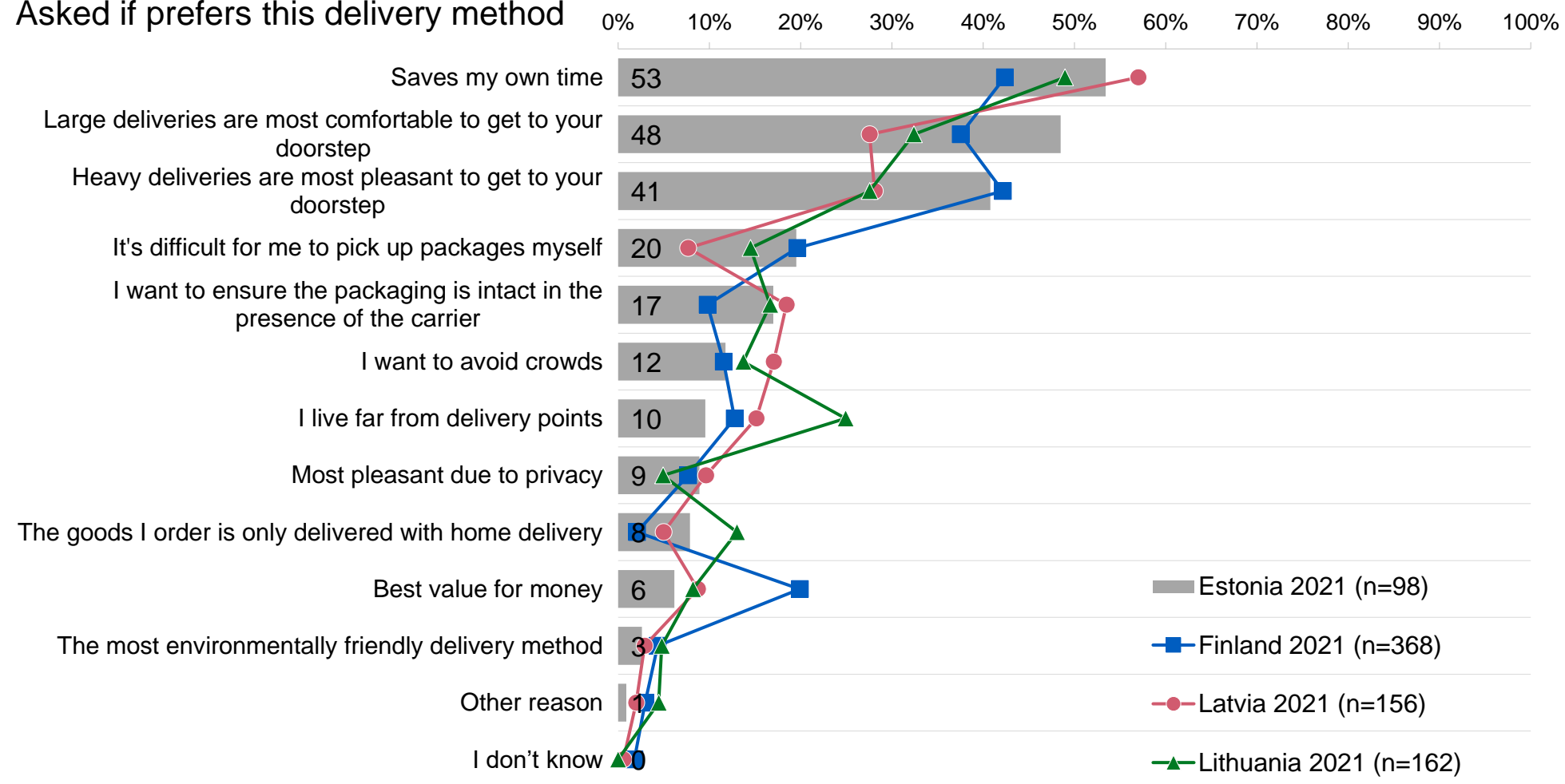
Why is a home delivery your preferred delivery method?

Asked if prefers this delivery method

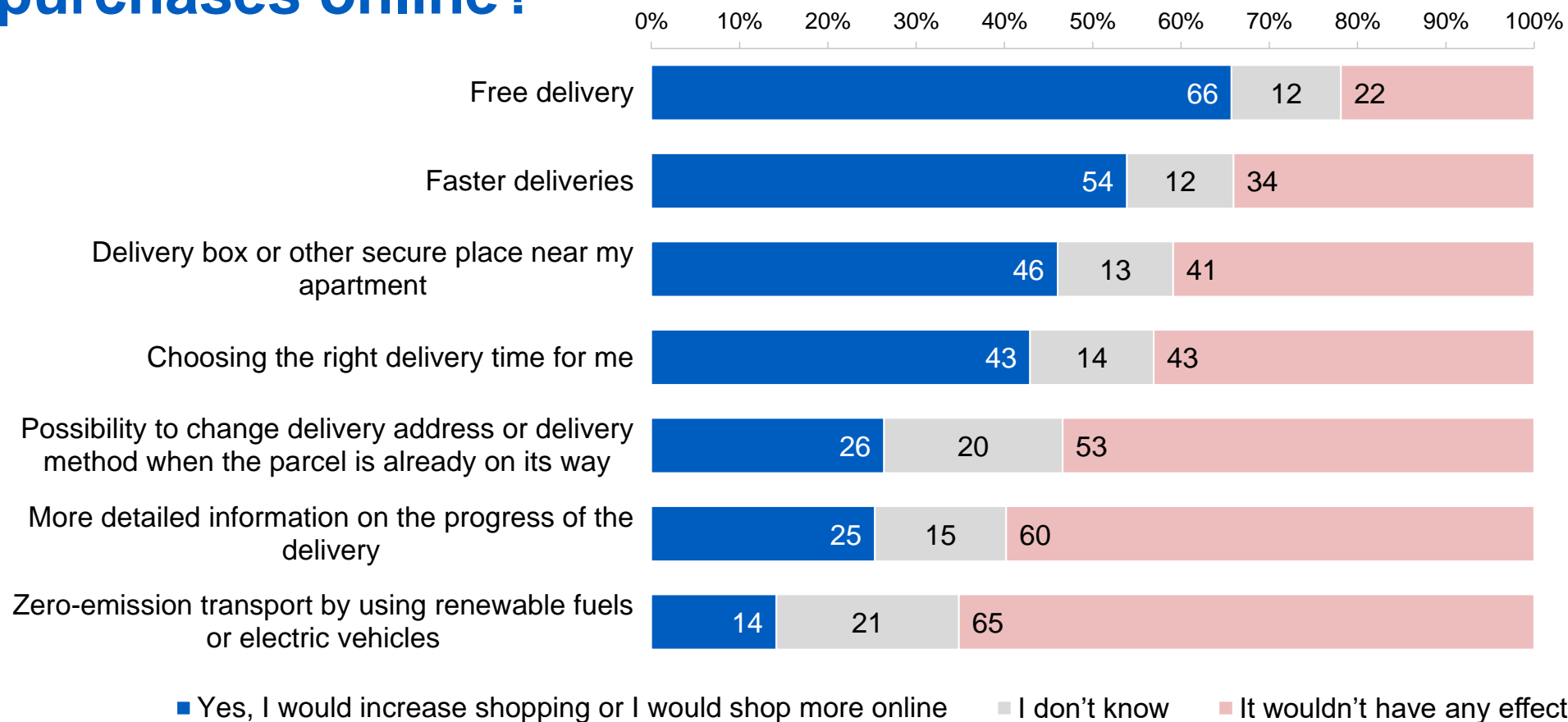


Why is a home delivery your preferred delivery method?

Asked if prefers this delivery method



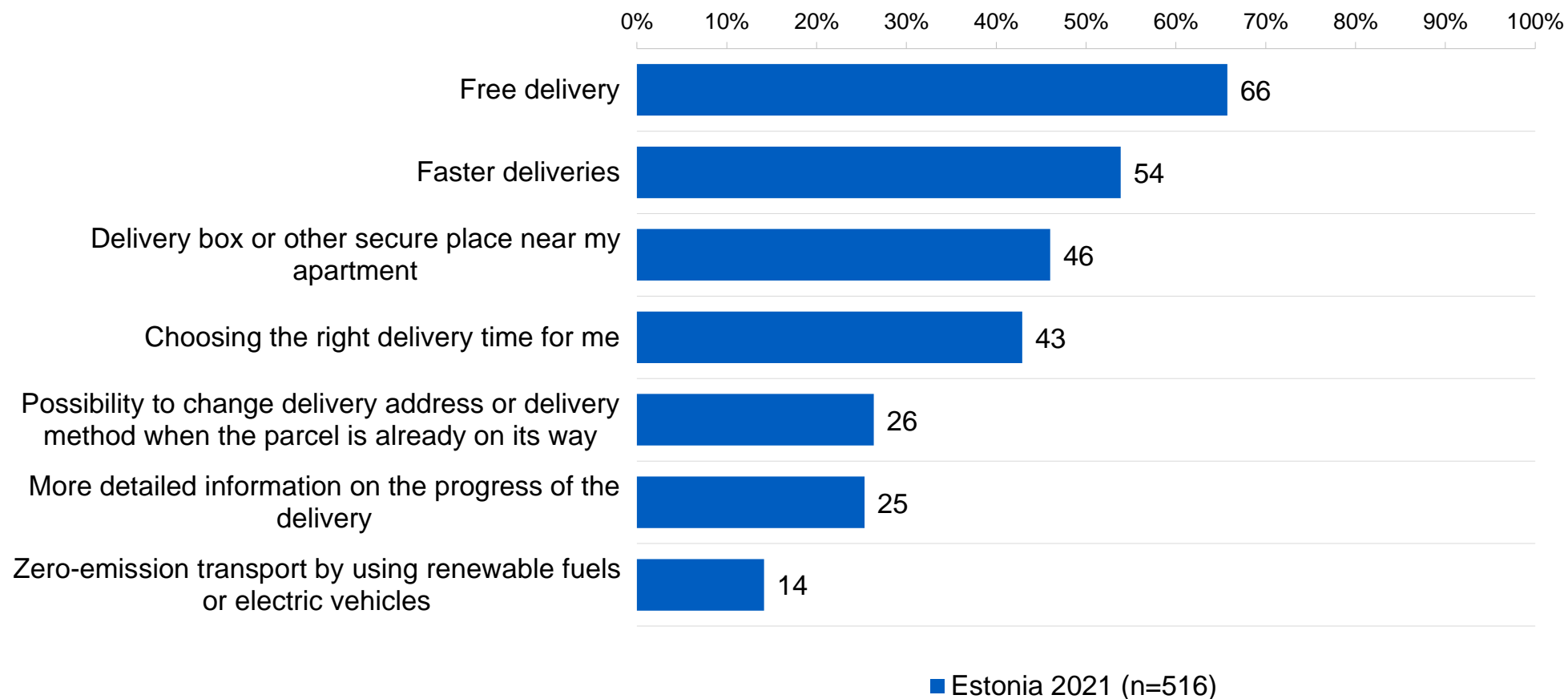
Would the following delivery options make you increase online shopping or move more of your purchases online?



Estonia 2021 (n=516)

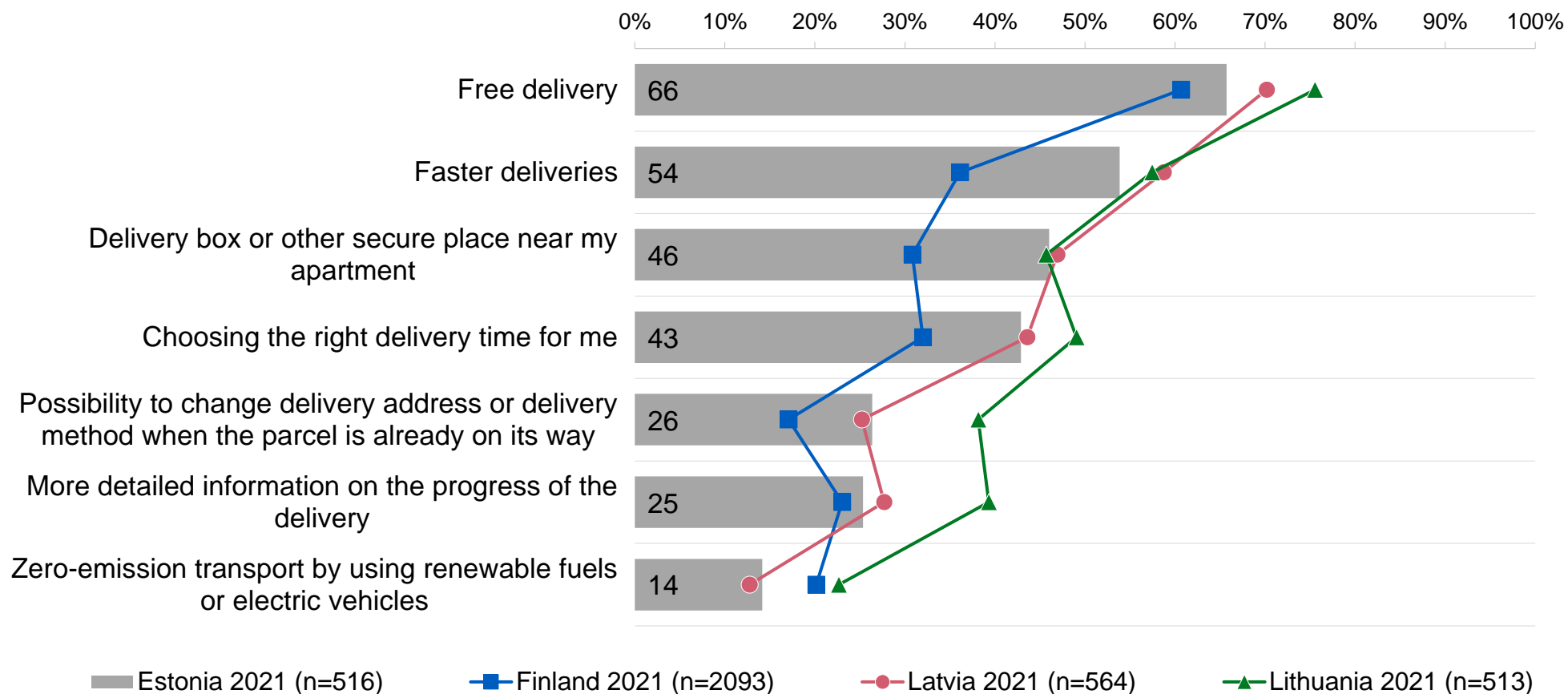
Would the following delivery options make you increase online shopping or move more of your purchases online?

Yes, I would increase shopping or I would shop more online

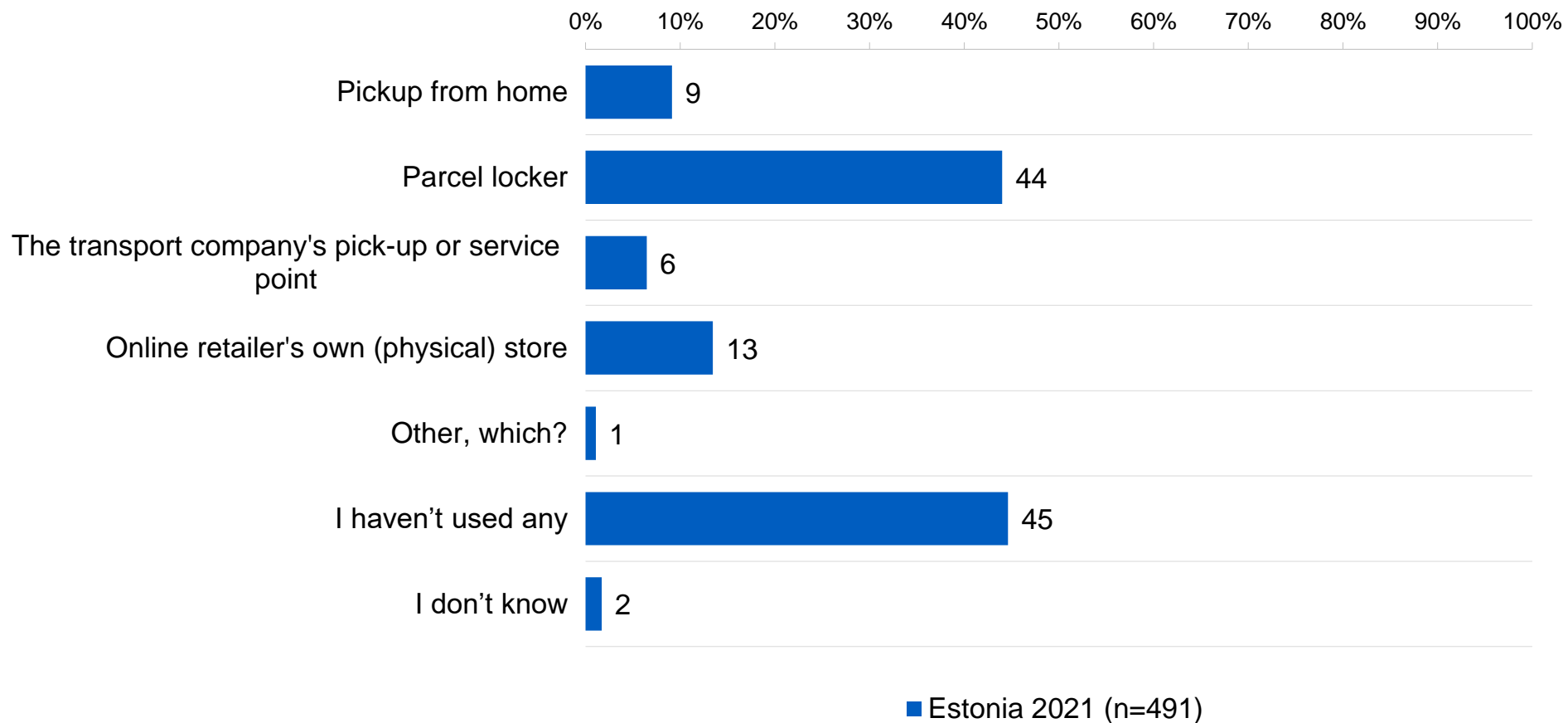


Would the following delivery options make you increase online shopping or move more of your purchases online?

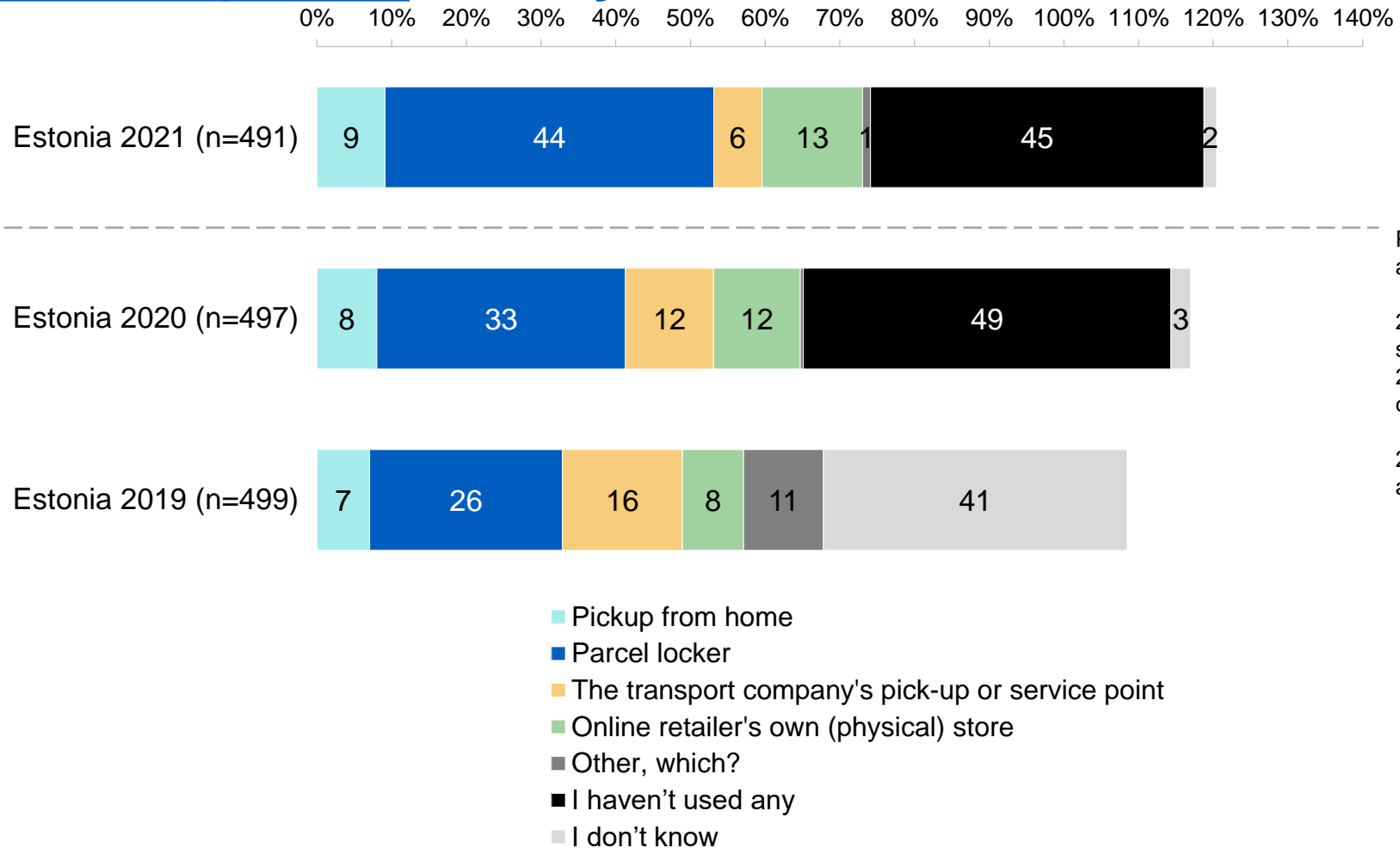
Yes, I would increase shopping or I would shop more online



Which of the following online purchases' return methods or points have you used?



Which of the following online purchases' return methods or points have you used?

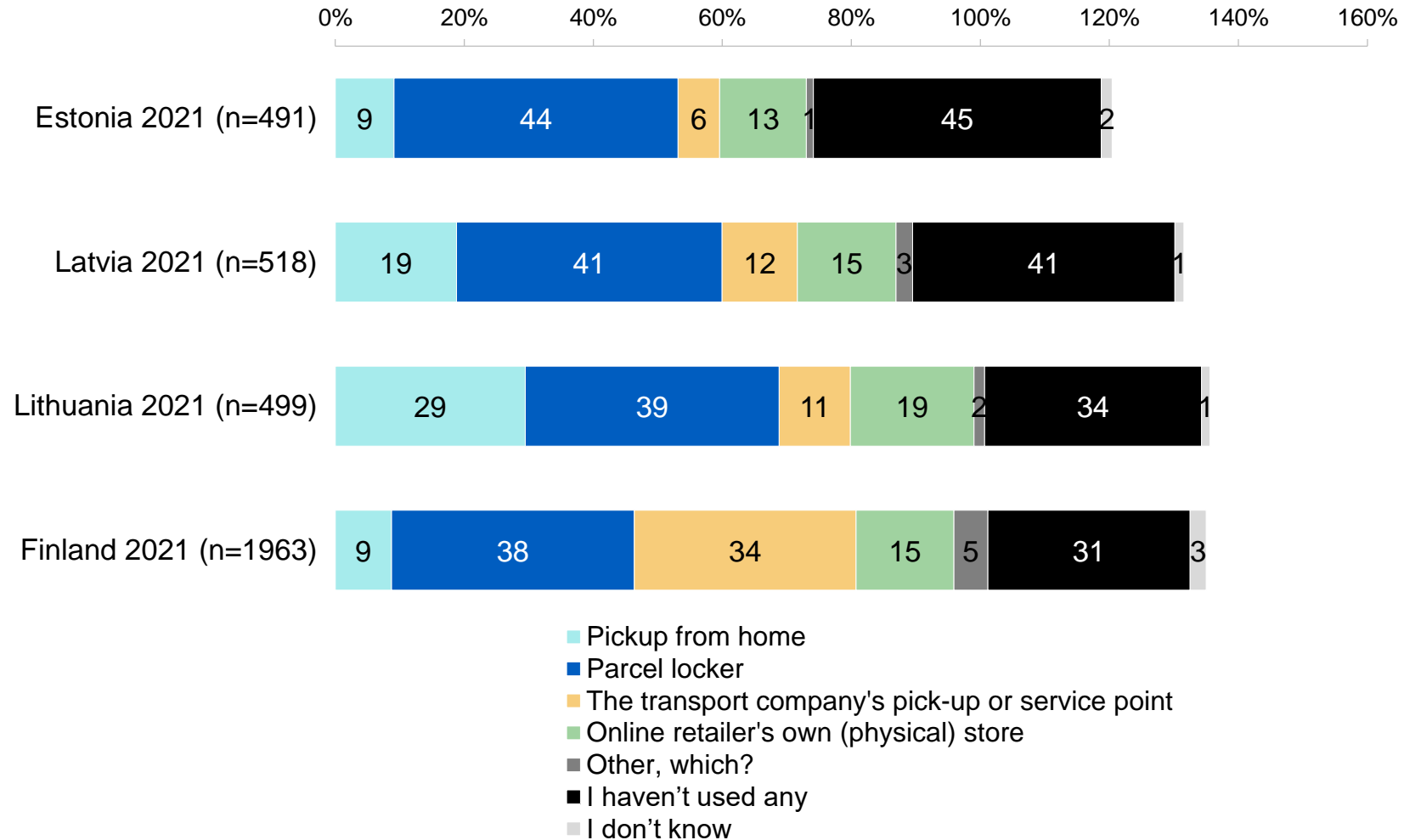


Please note: The question changed, annual comparison indicative only.

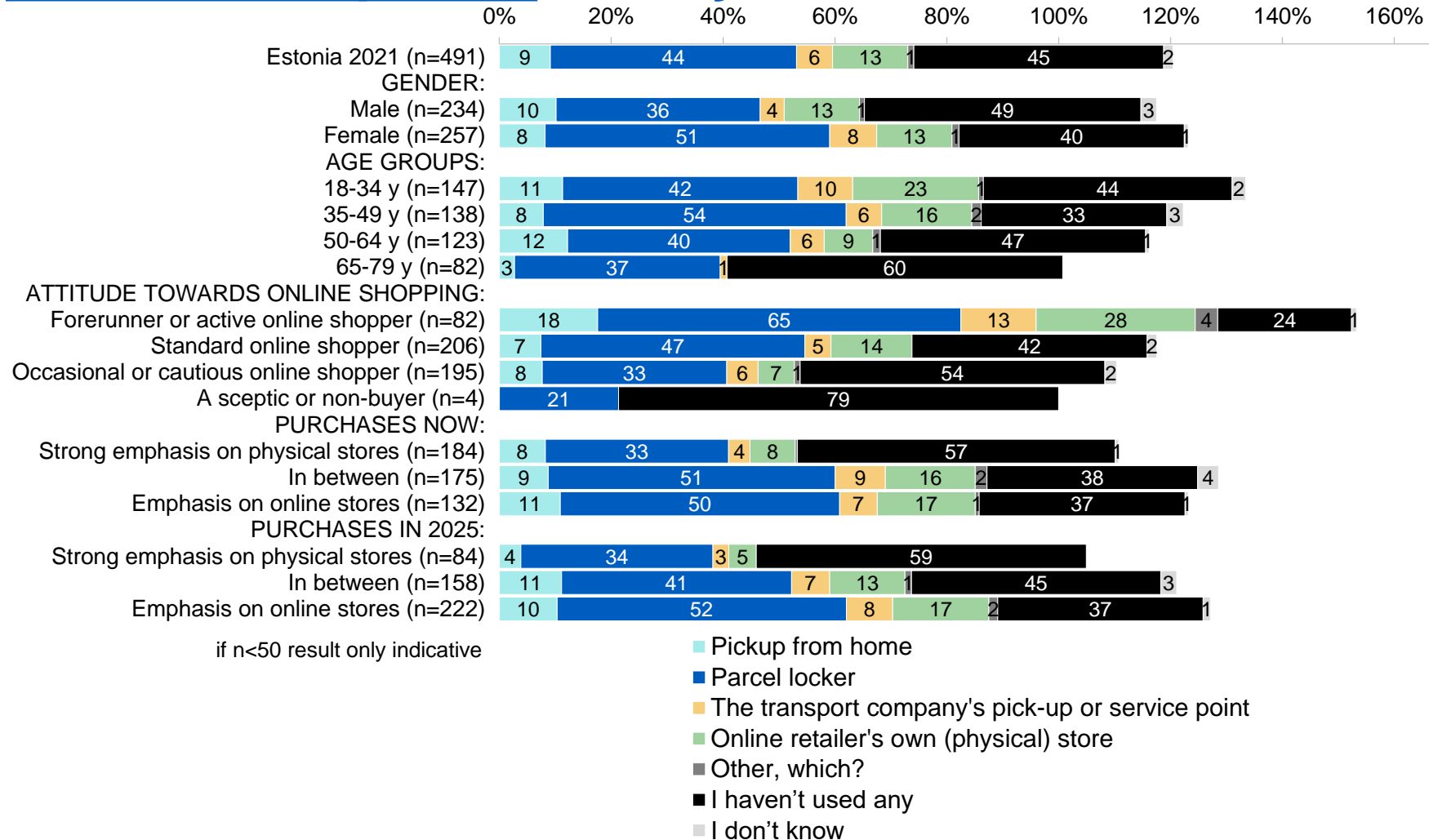
2021: The transport company's pick-up or service point
 2019-2020: Service point (transport company's point or Posti)

2019 not included alternative: I haven't used any

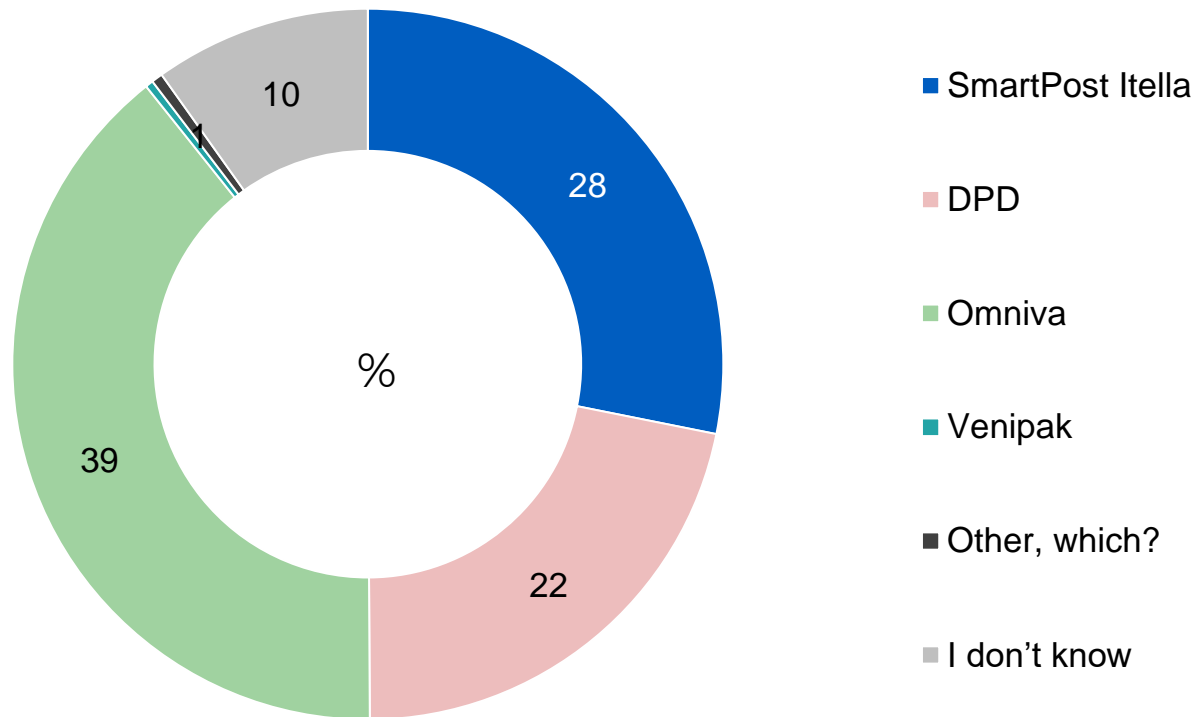
Which of the following online purchases' return methods or points have you used?



Which of the following online purchases' return methods or points have you used?

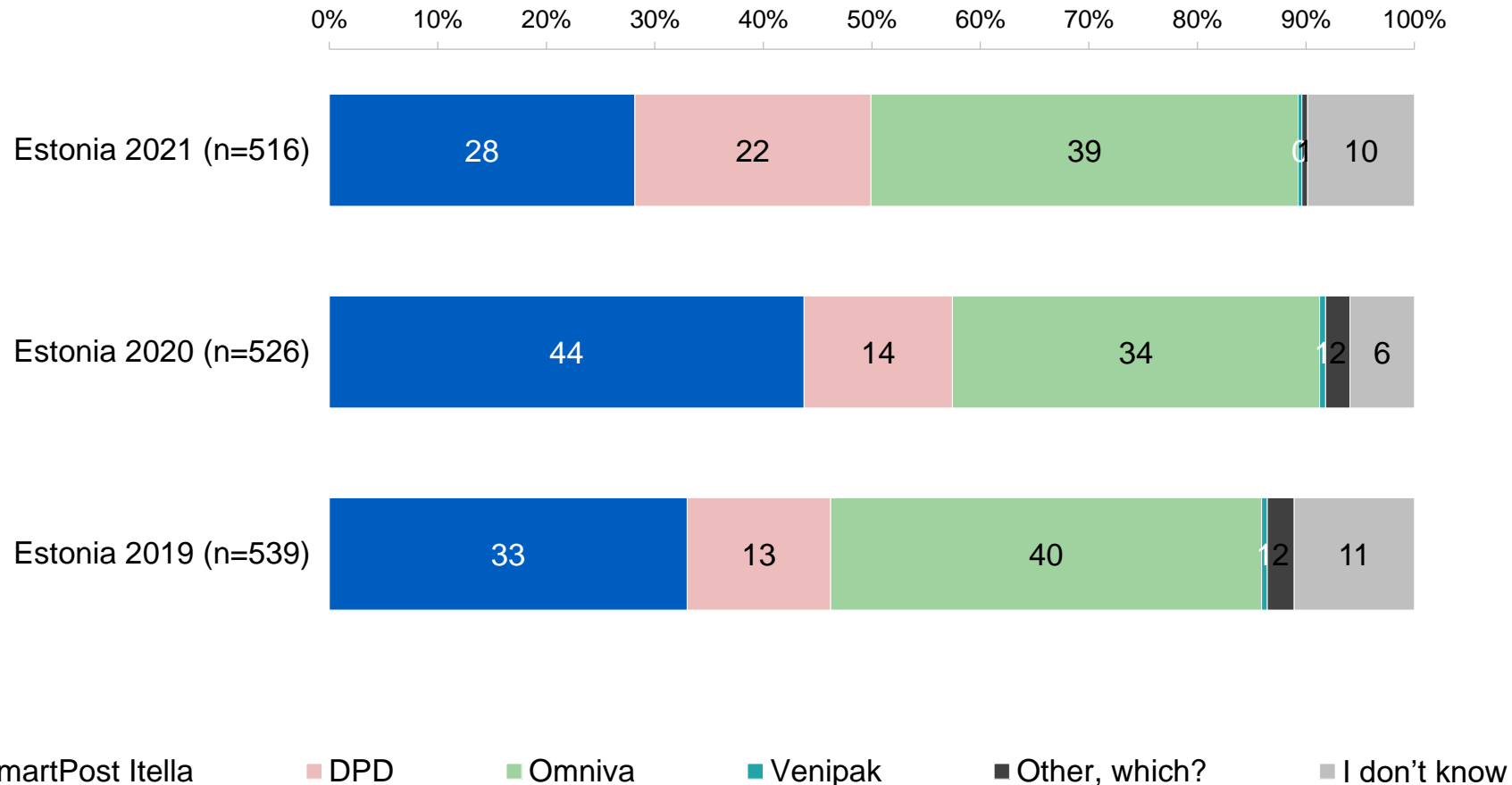


Which of the following transport or delivery companies do you prefer to use?



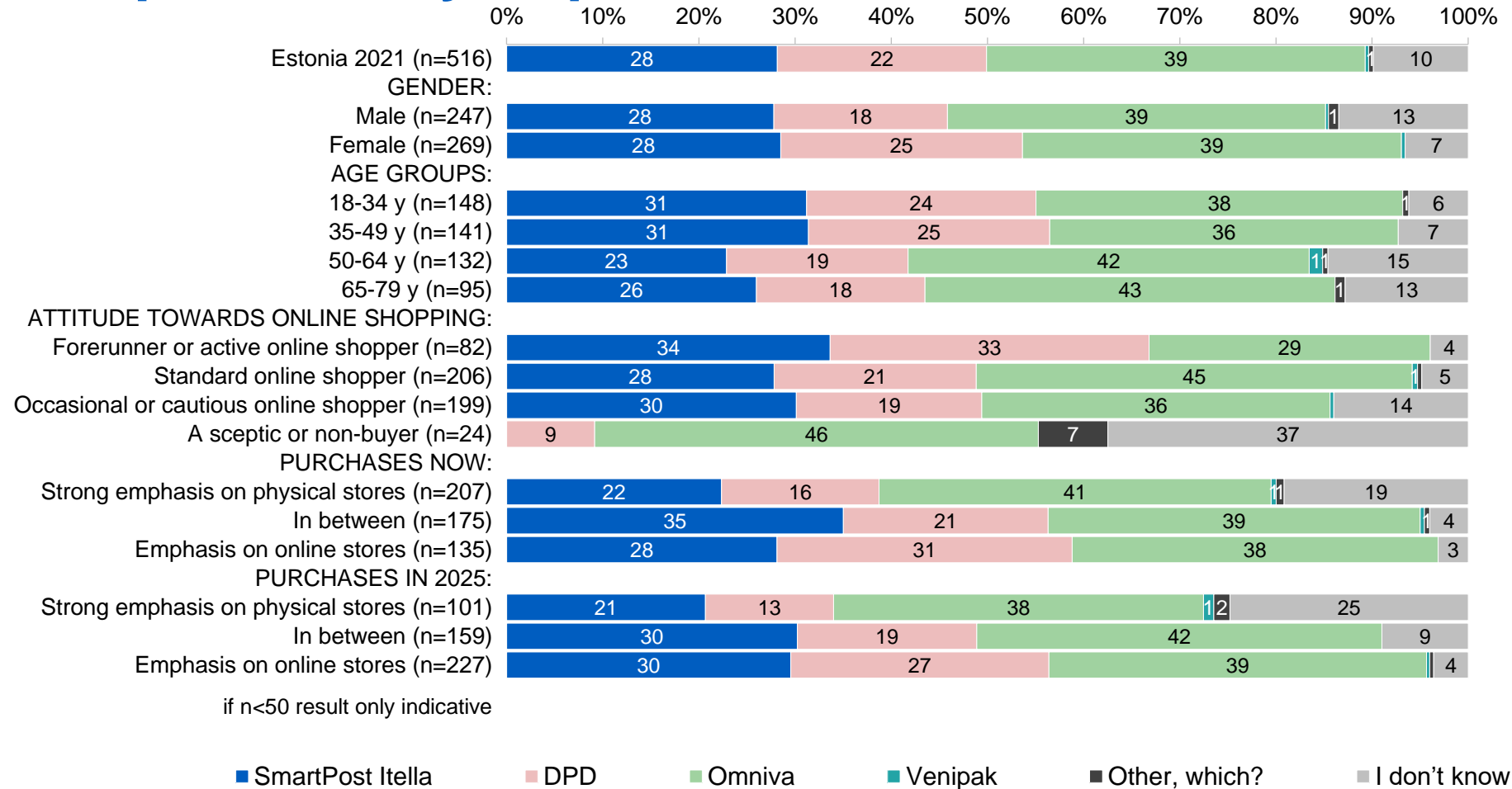
Estonia 2021 (n=516)

Which of the following transport or delivery companies do you prefer to use?



2020: Itella SmartPost

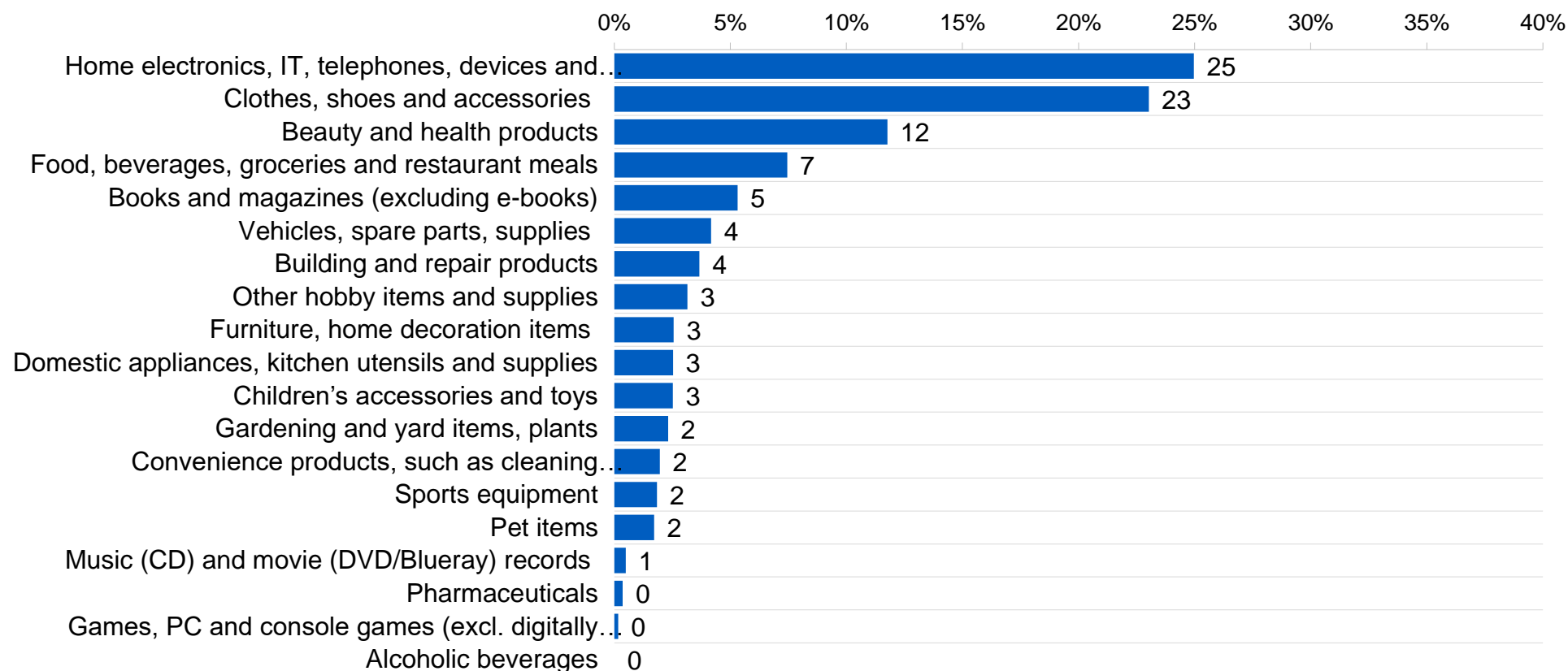
Which of the following transport or delivery companies do you prefer to use?



Latest purchase

What goods did you last buy online?

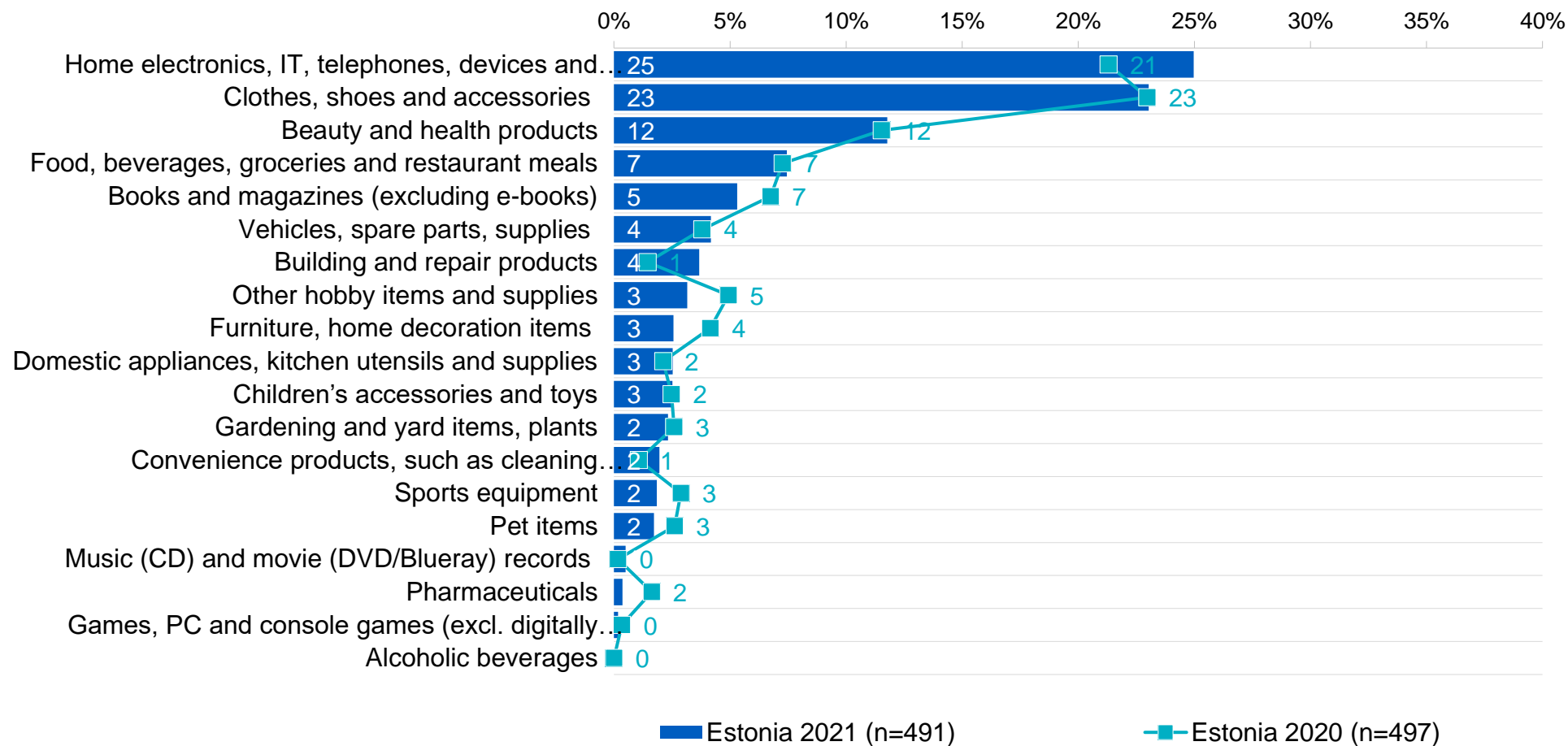
Product already received, not still on its way



■ Estonia 2021 (n=491)

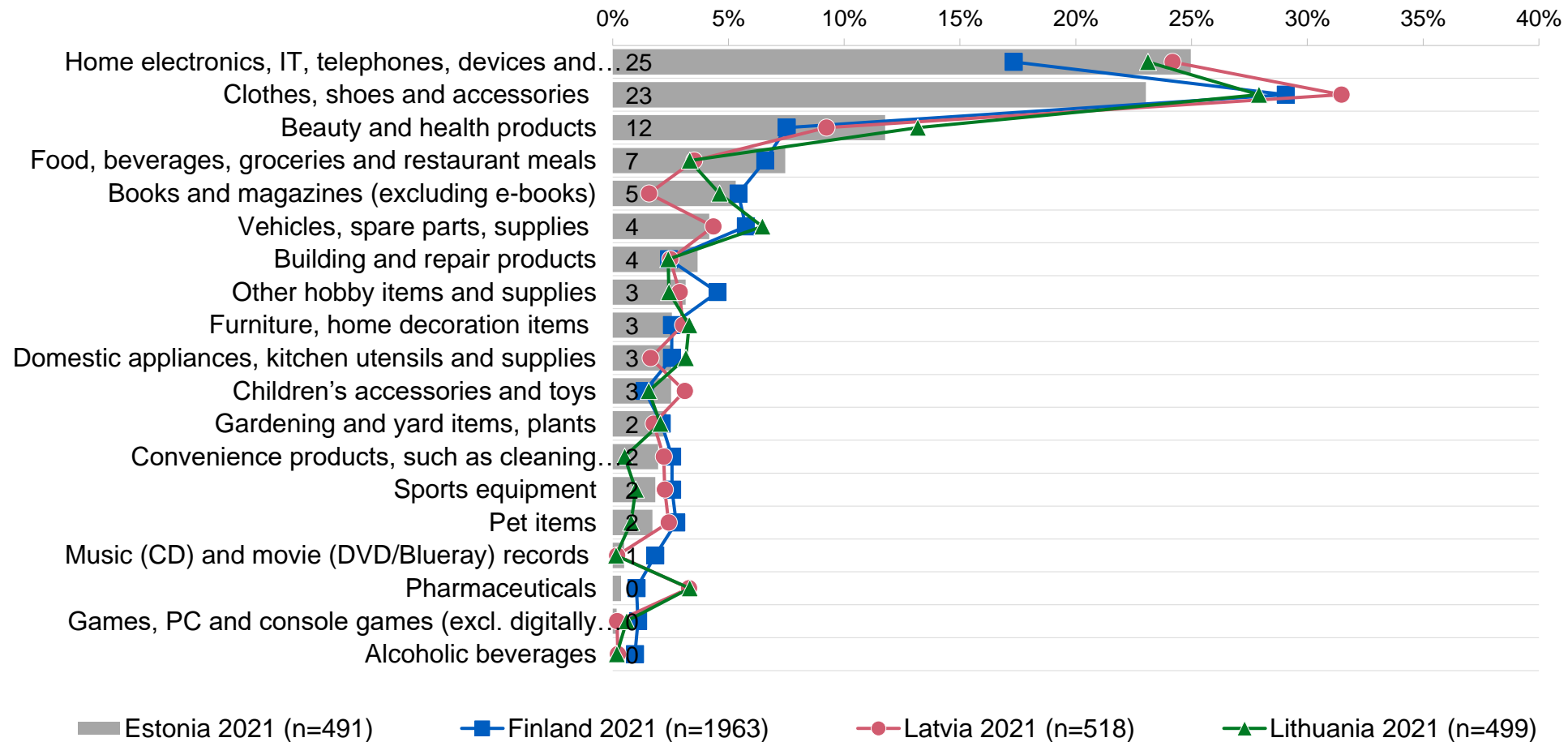
What goods did you last buy online?

Product already received, not still on its way

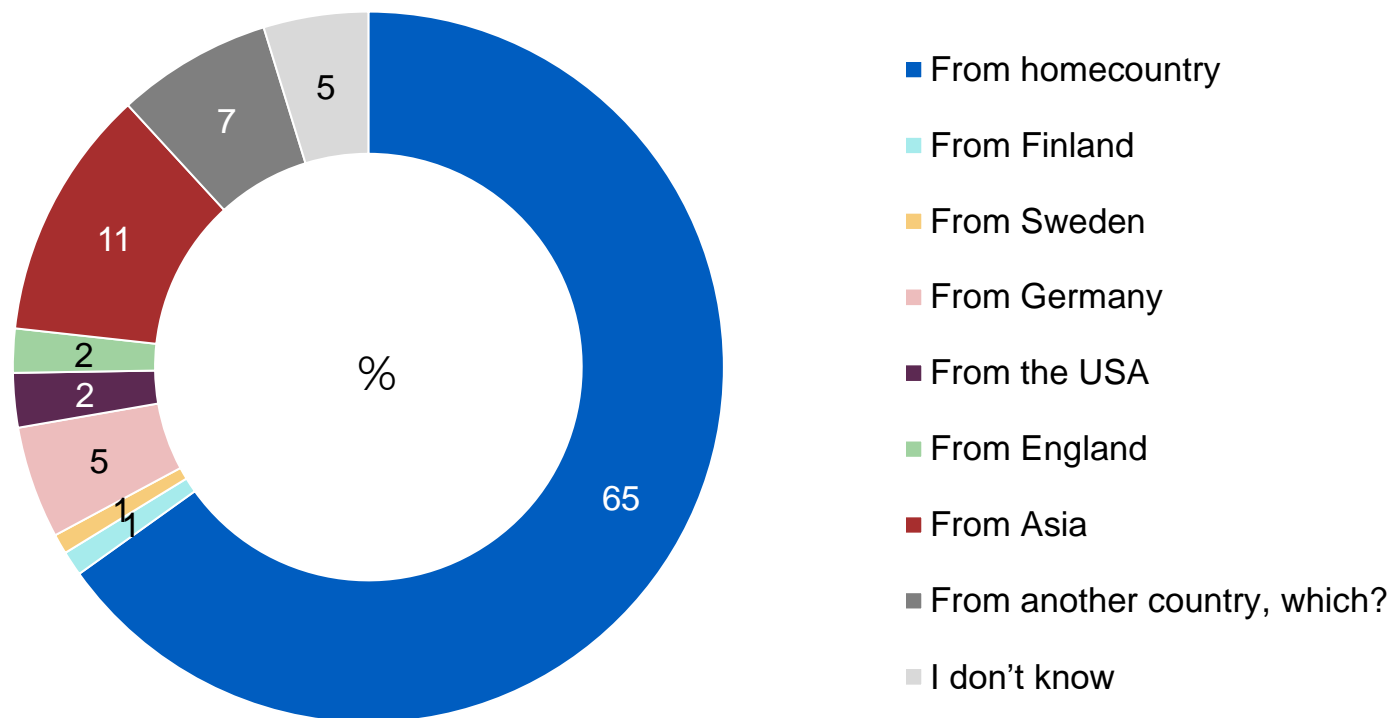


What goods did you last buy online?

Product already received, not still on its way

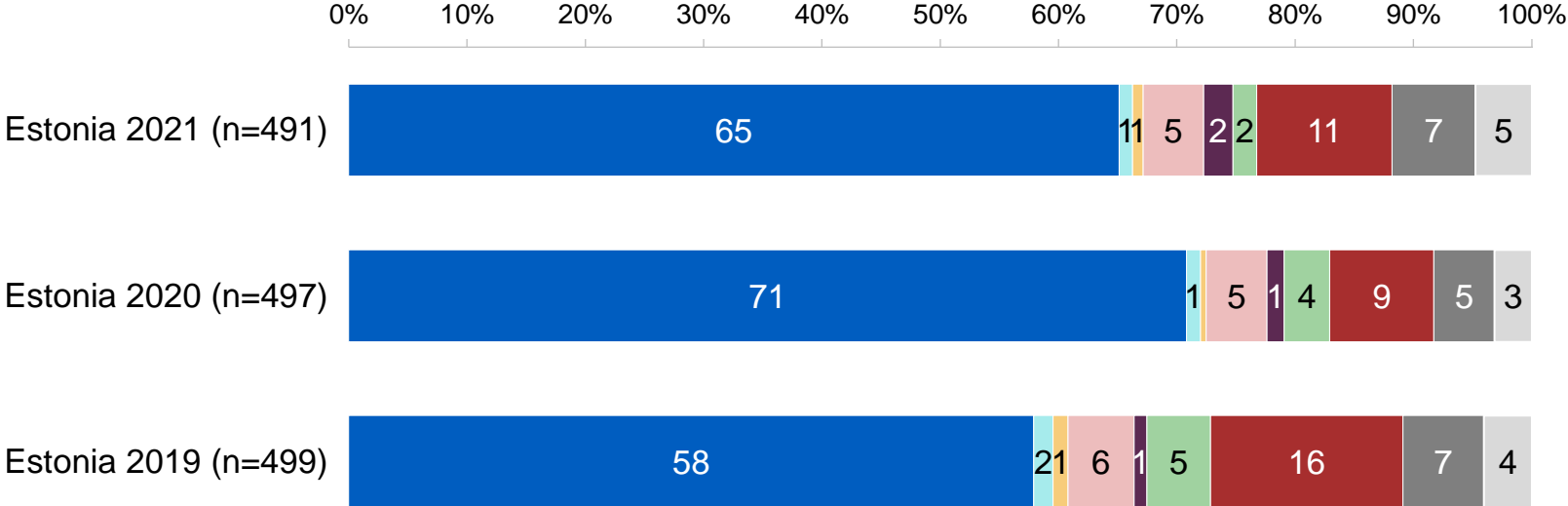


From which country was the latest online purchase sent to you?



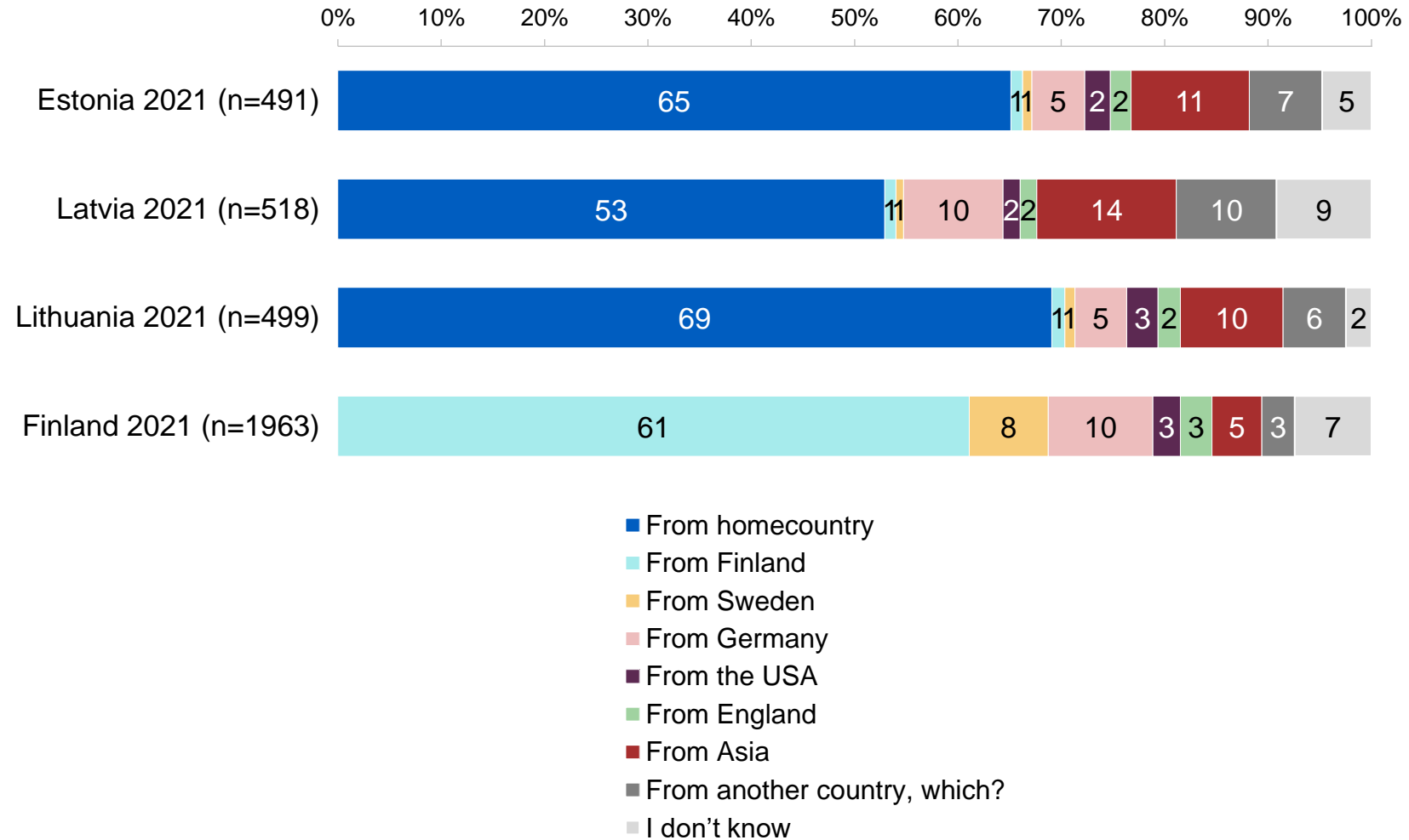
Estonia 2021 (n=491)

From which country was the latest online purchase sent to you?

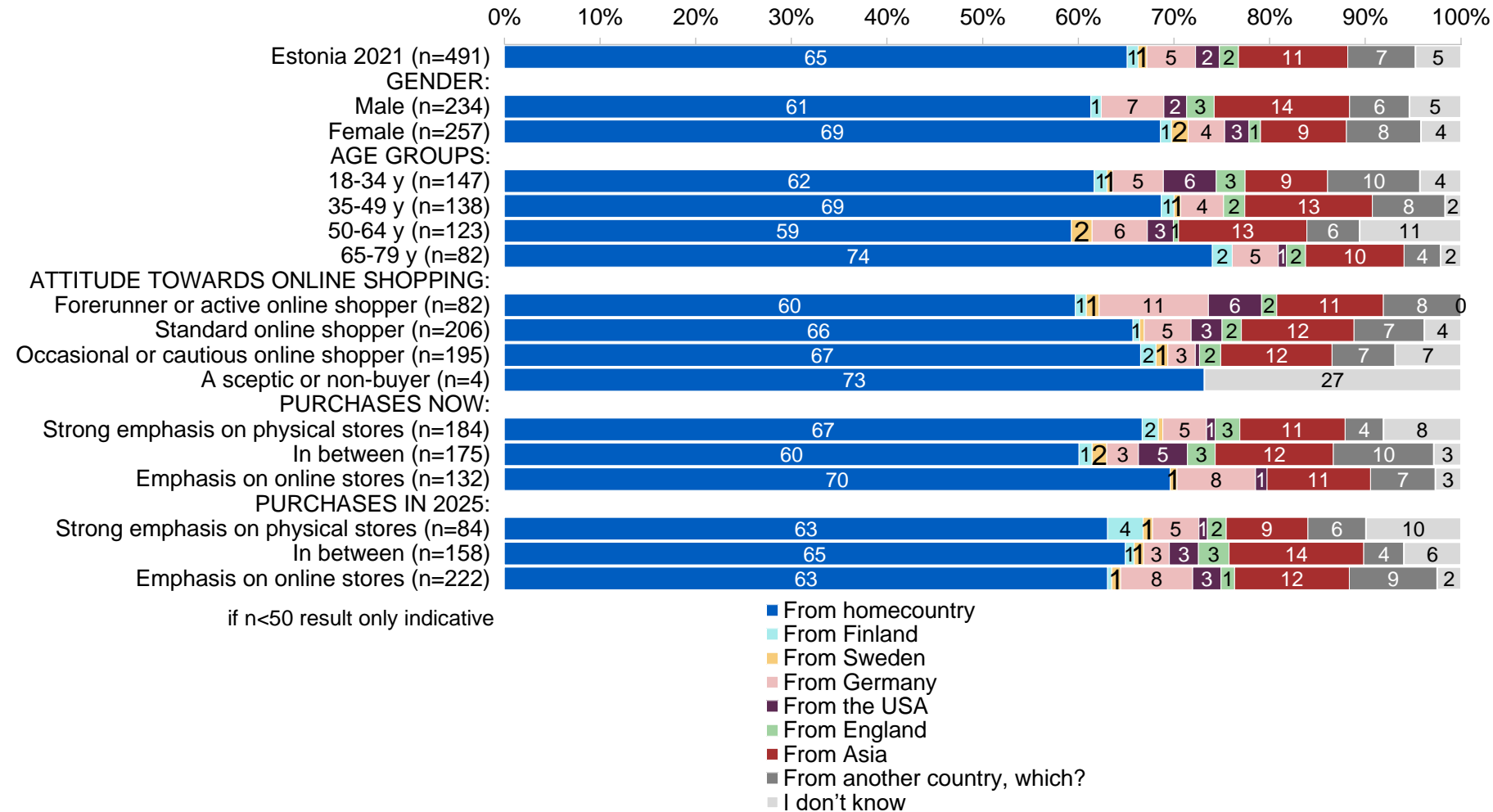


- From homecountry
- From Finland
- From Sweden
- From Germany
- From the USA
- From England
- From Asia
- From another country, which?
- I don't know

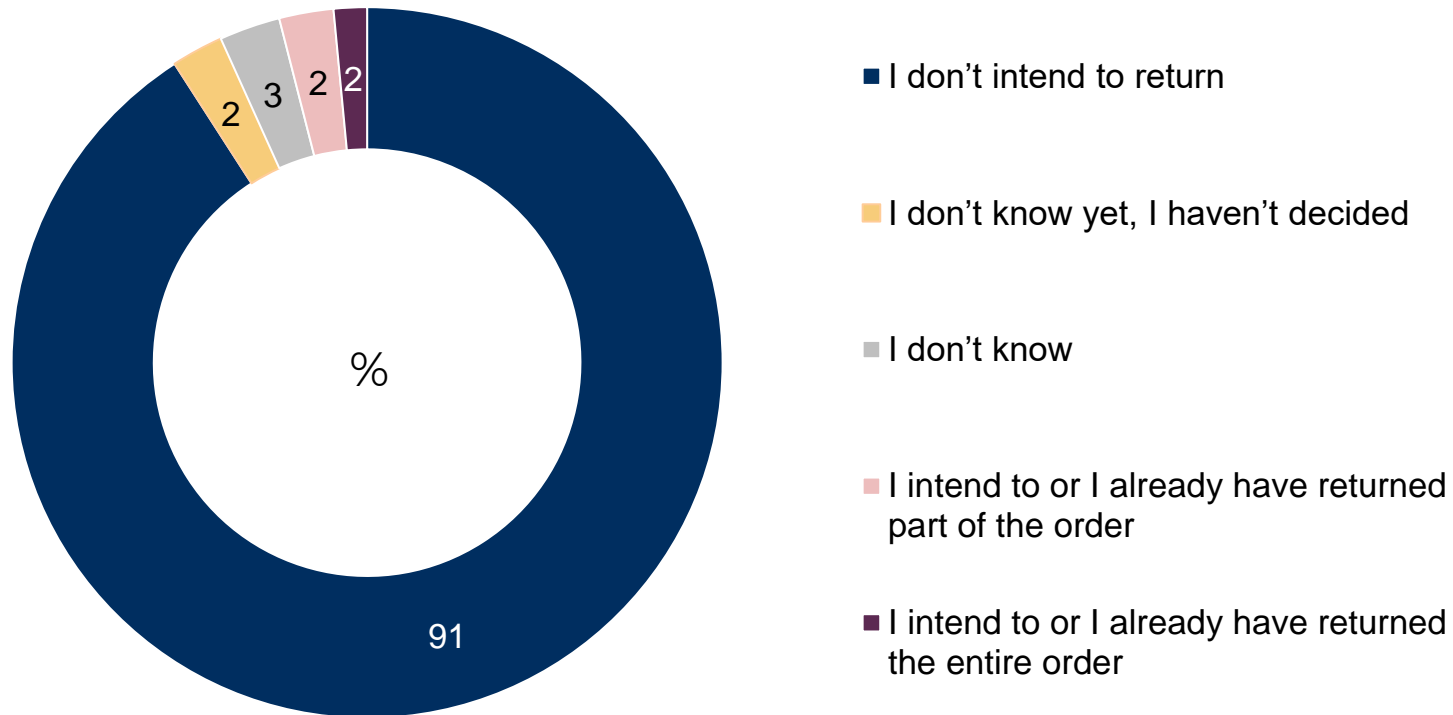
From which country was the latest online purchase sent to you?



From which country was the latest online purchase sent to you?

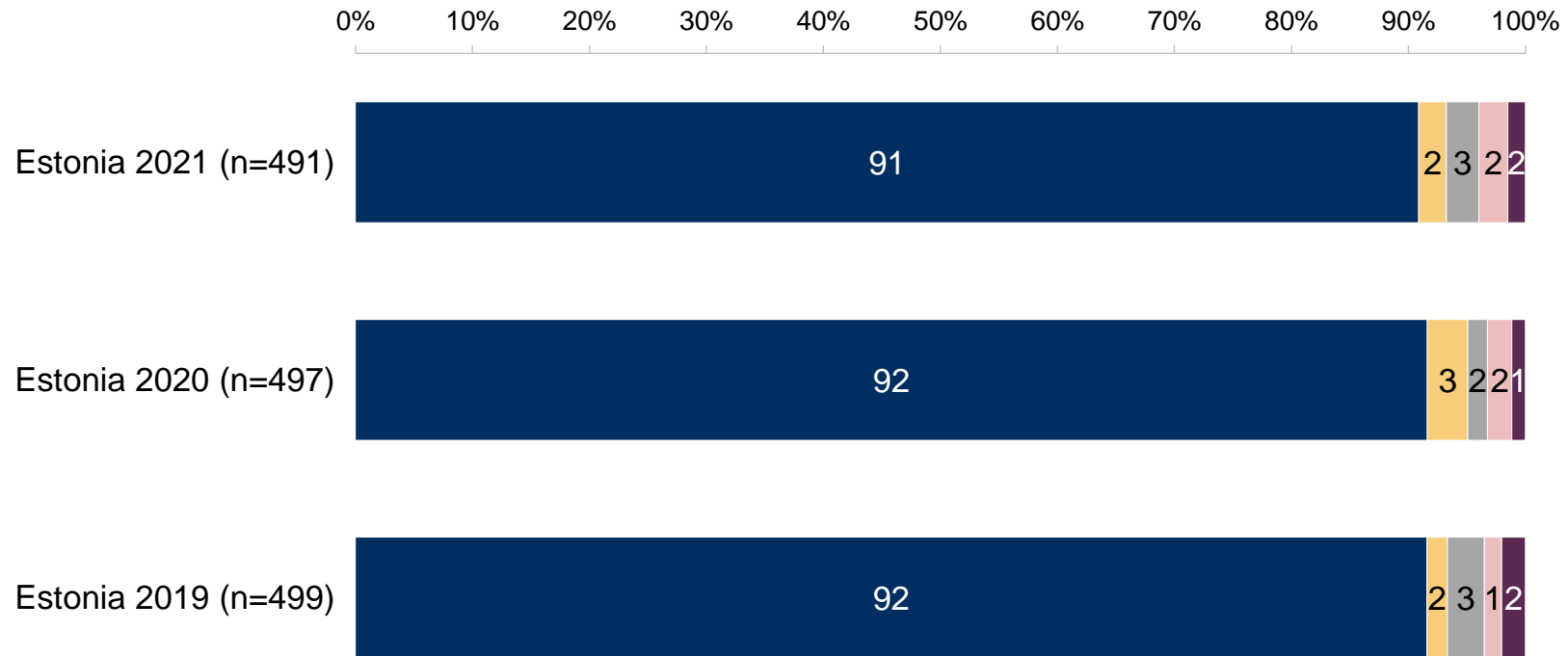


Do you intend to return or have you already returned your latest online purchase?



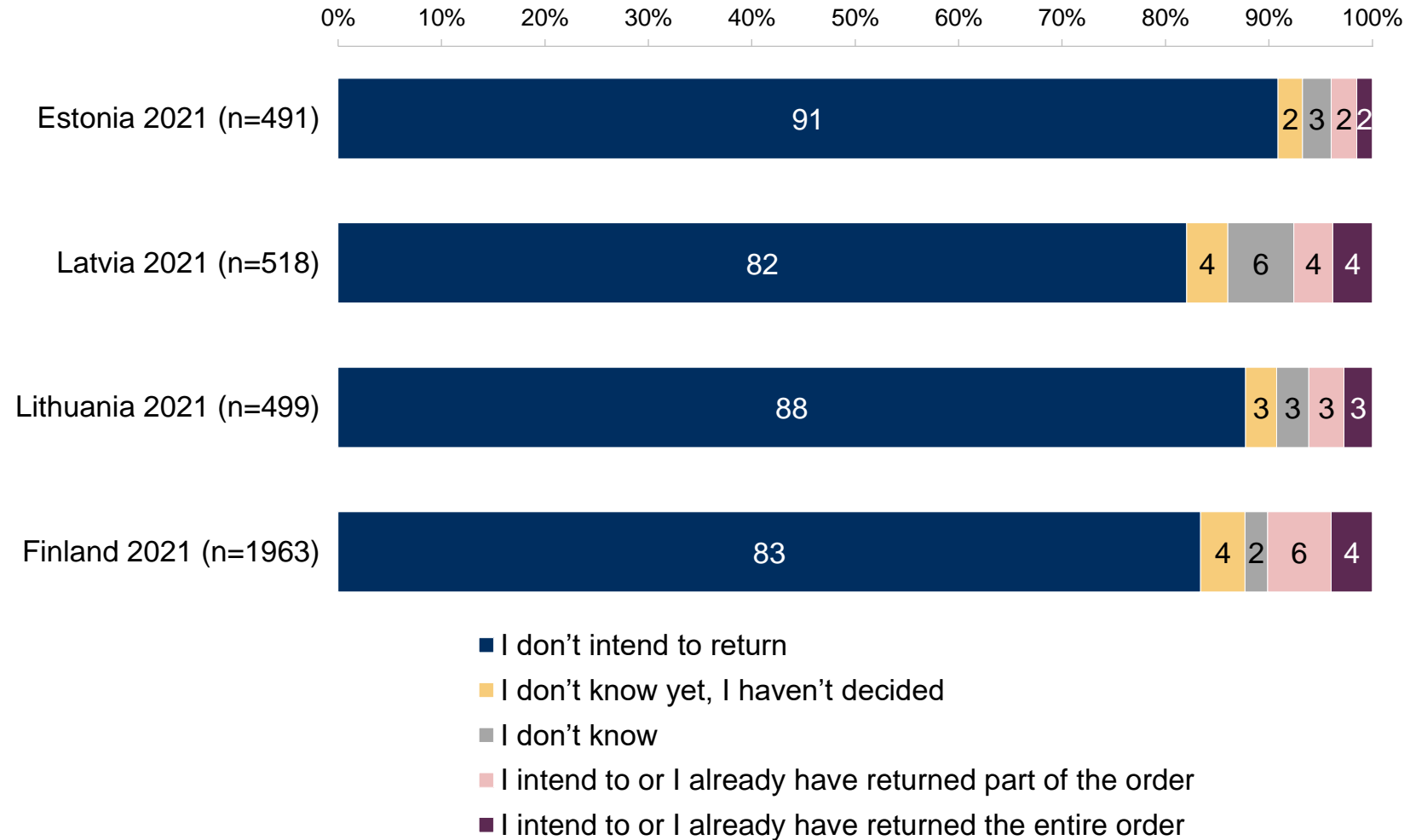
Estonia 2021 (n=491)

Do you intend to return or have you already returned your latest online purchase?

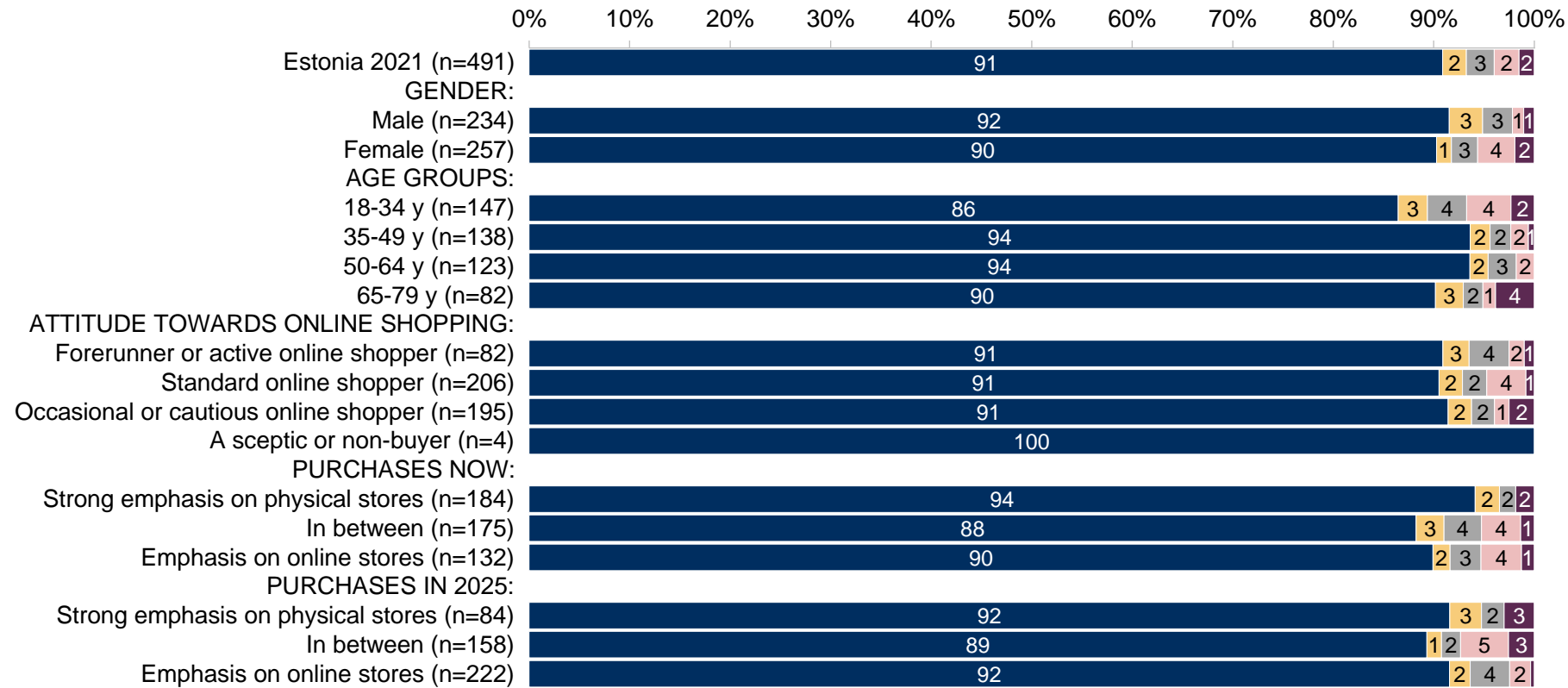


- I don't intend to return
- I don't know yet, I haven't decided
- I don't know
- I intend to or I already have returned part of the order
- I intend to or I already have returned the entire order

Do you intend to return or have you already returned your latest online purchase?



Do you intend to return or have you already returned your latest online purchase?

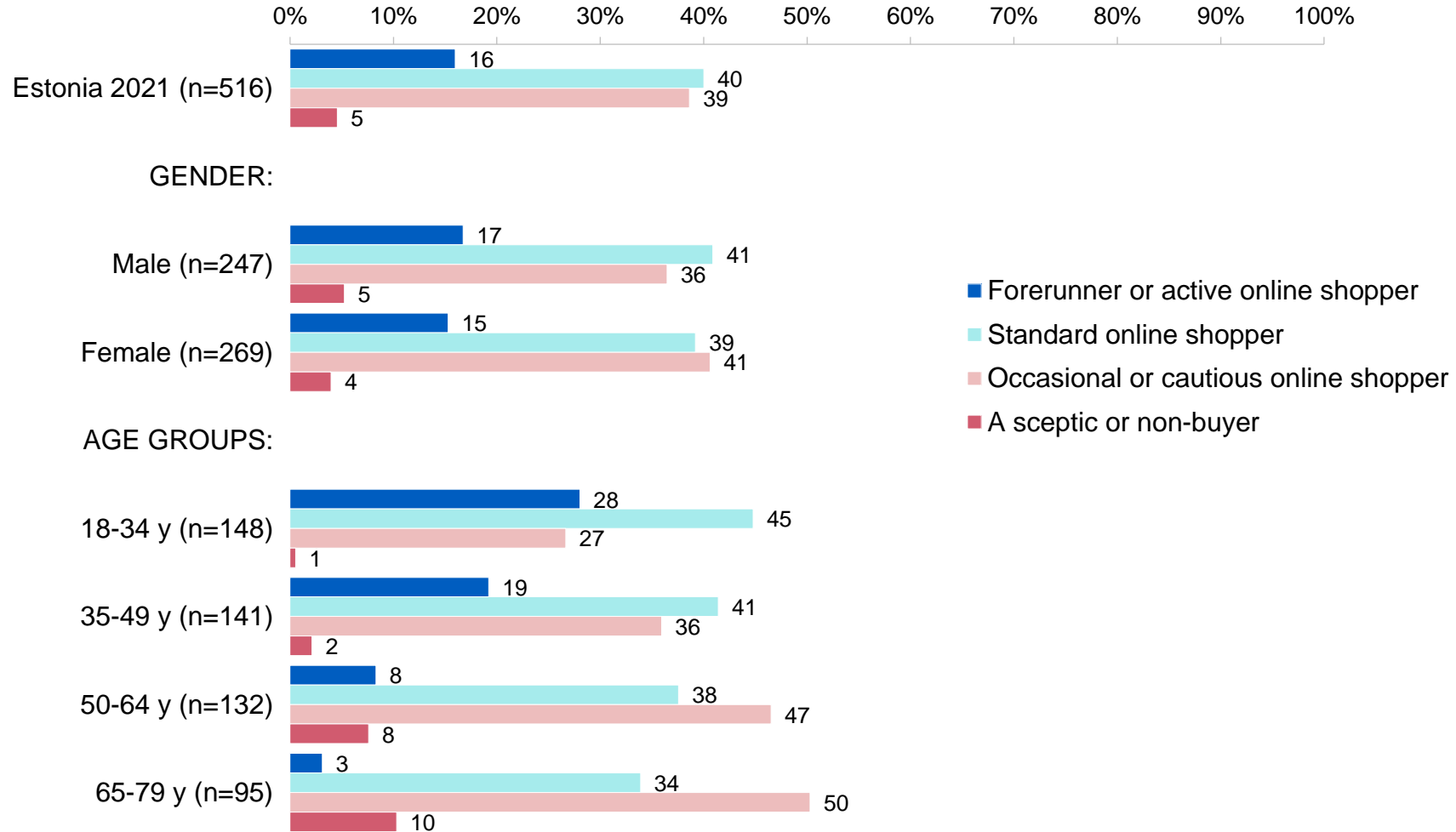


if n<50 result only indicative

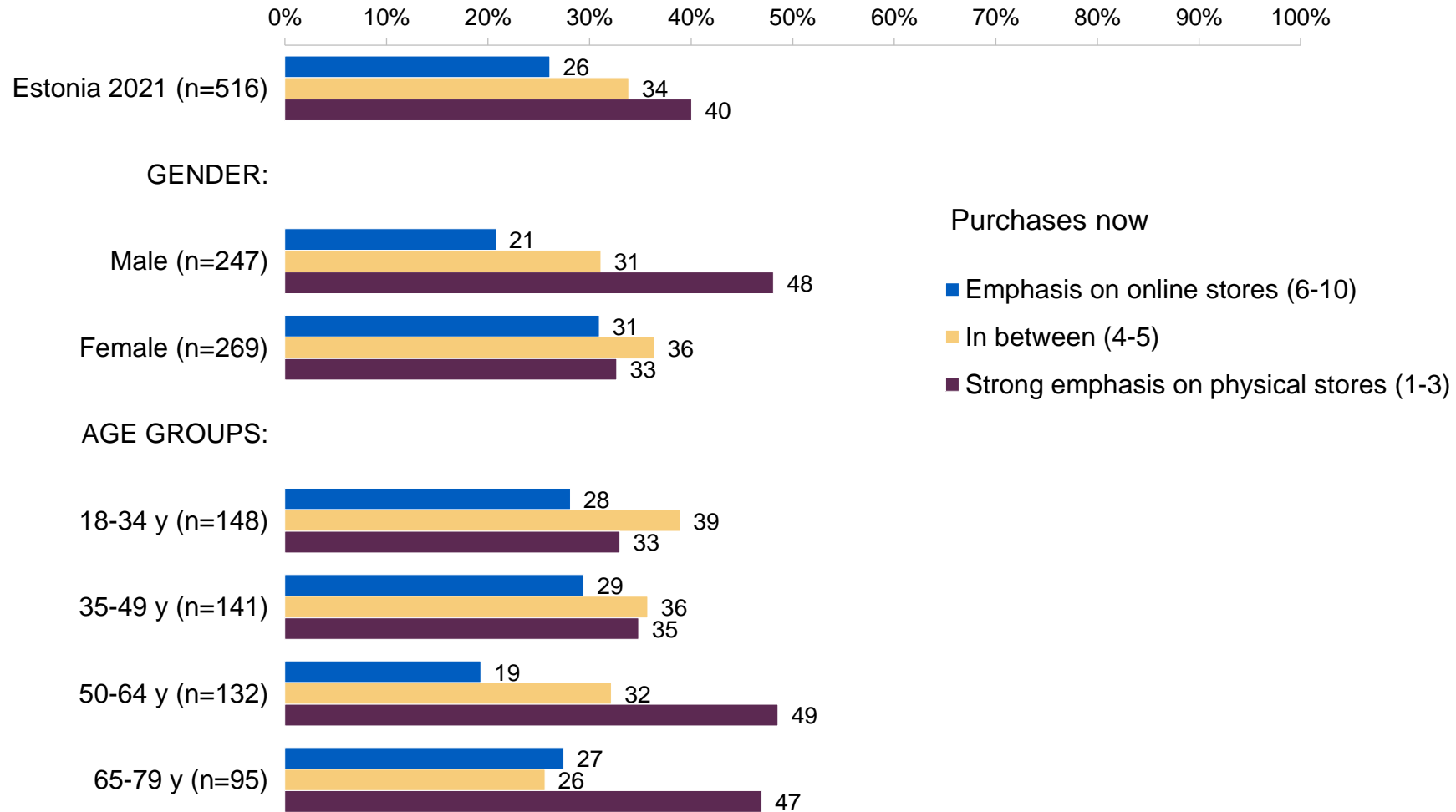
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Profiles

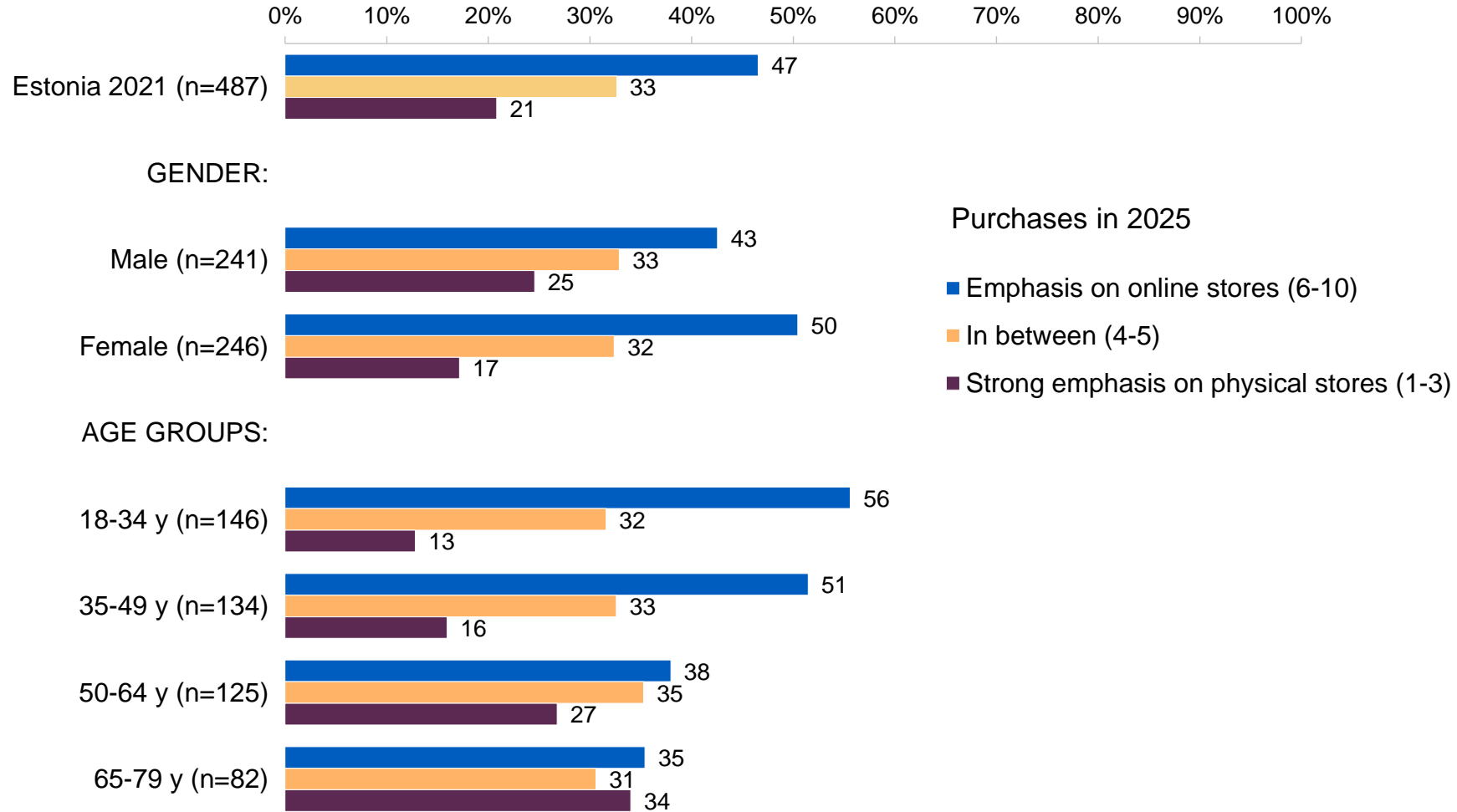
Profiles



Profiles



Profiles

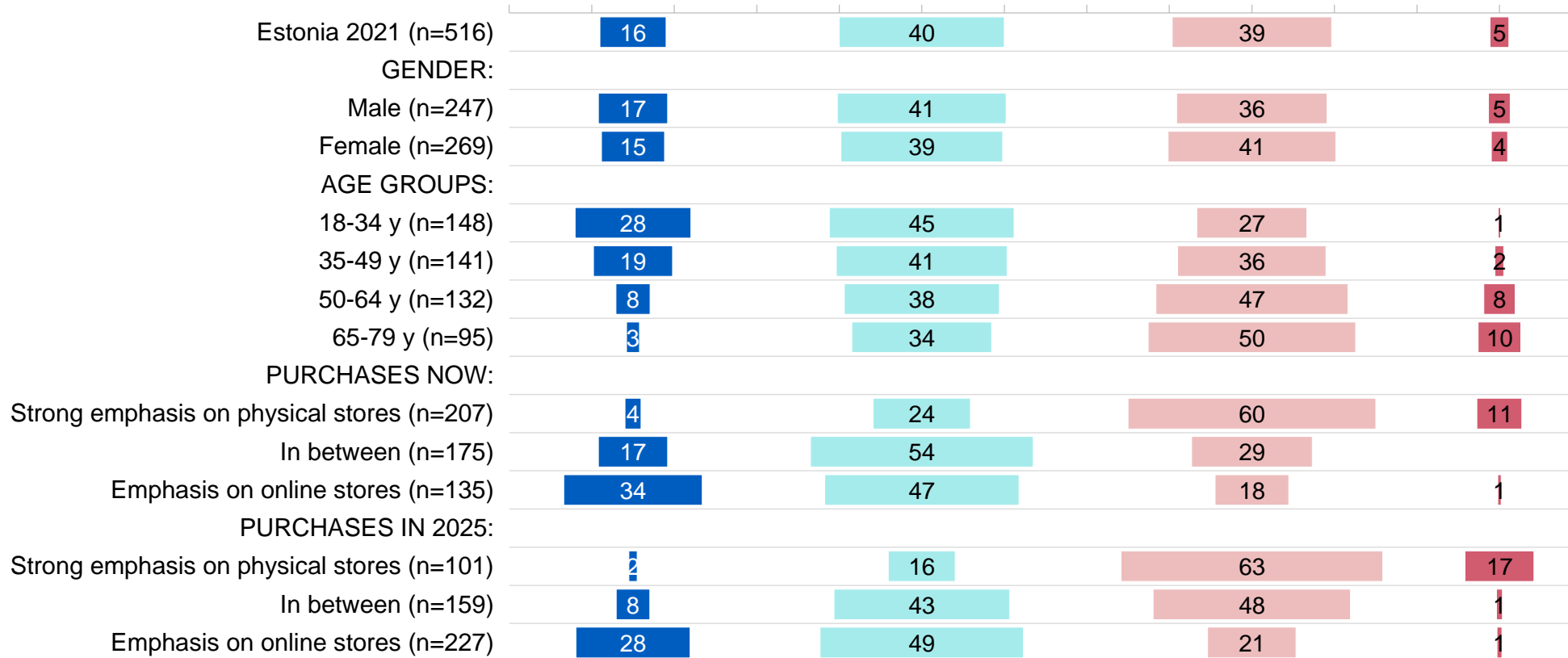


Profiles



■ Forerunner or active online shopper
 ■ Standard online shopper
 ■ Occasional or cautious online shopper
 ■ A sceptic or non-buyer

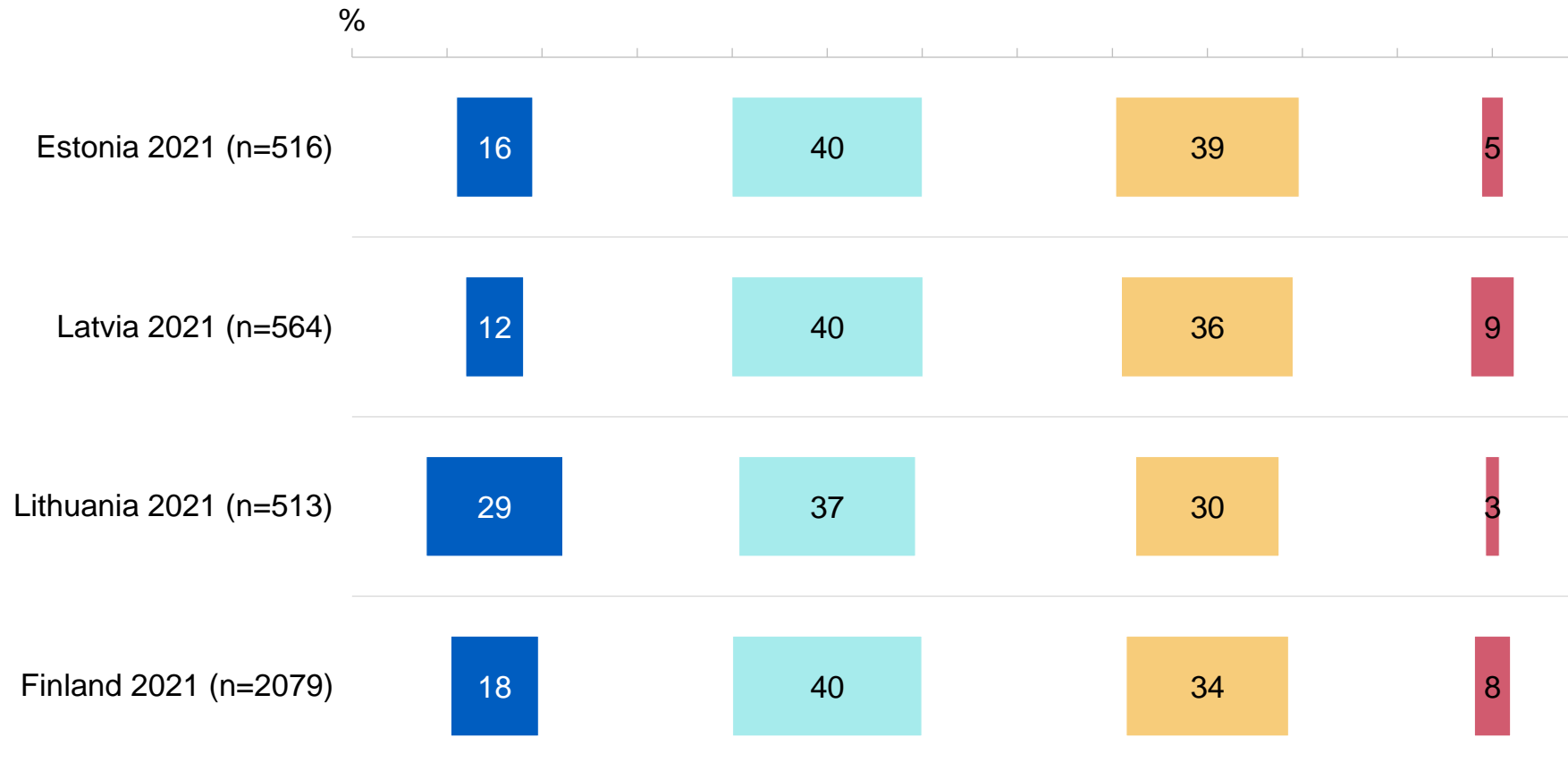
%



Profiles



■ Forerunner or active online shopper ■ Standard online shopper ■ Occasional or cautious online shopper ■ A sceptic or non-buyer



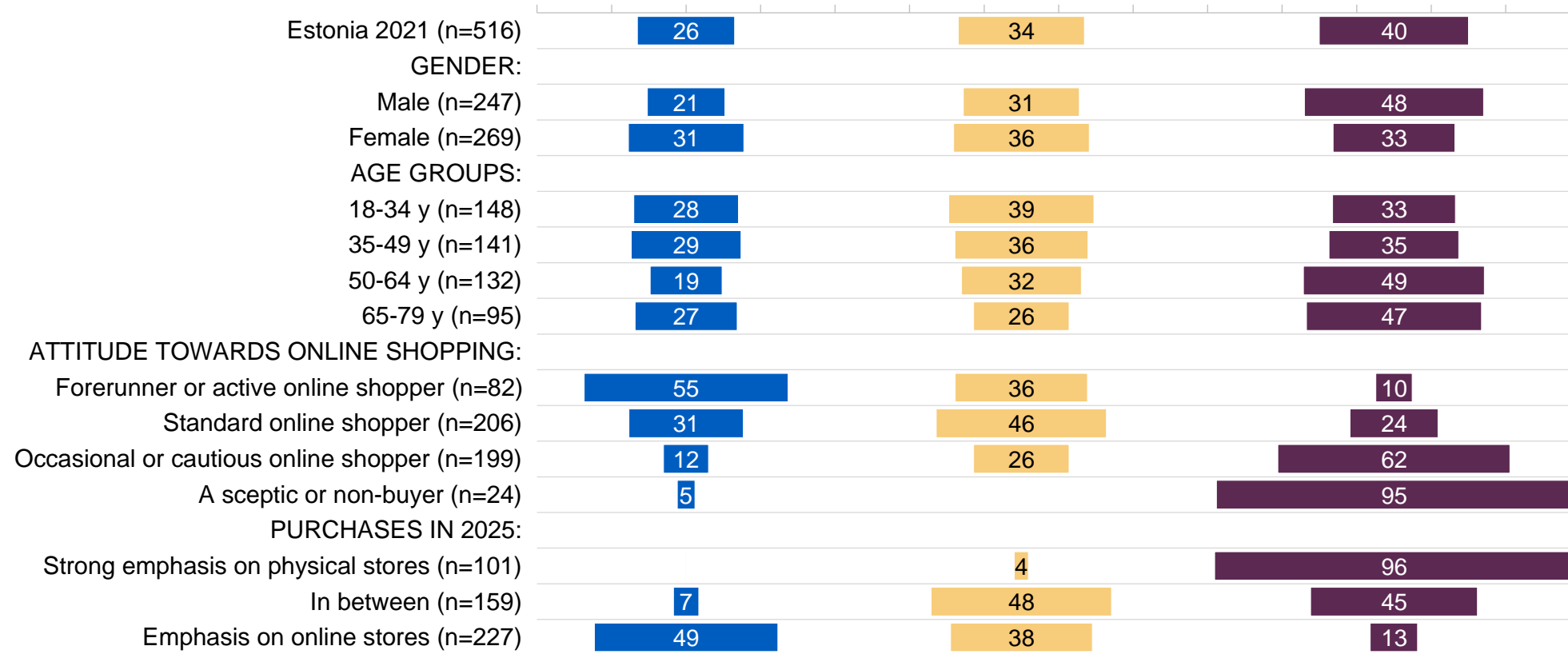
Profiles



Purchases now

■ Emphasis on online stores (6-10) ■ In between (4-5) ■ Strong emphasis on physical stores (1-3)

%



if n<50 result only indicative

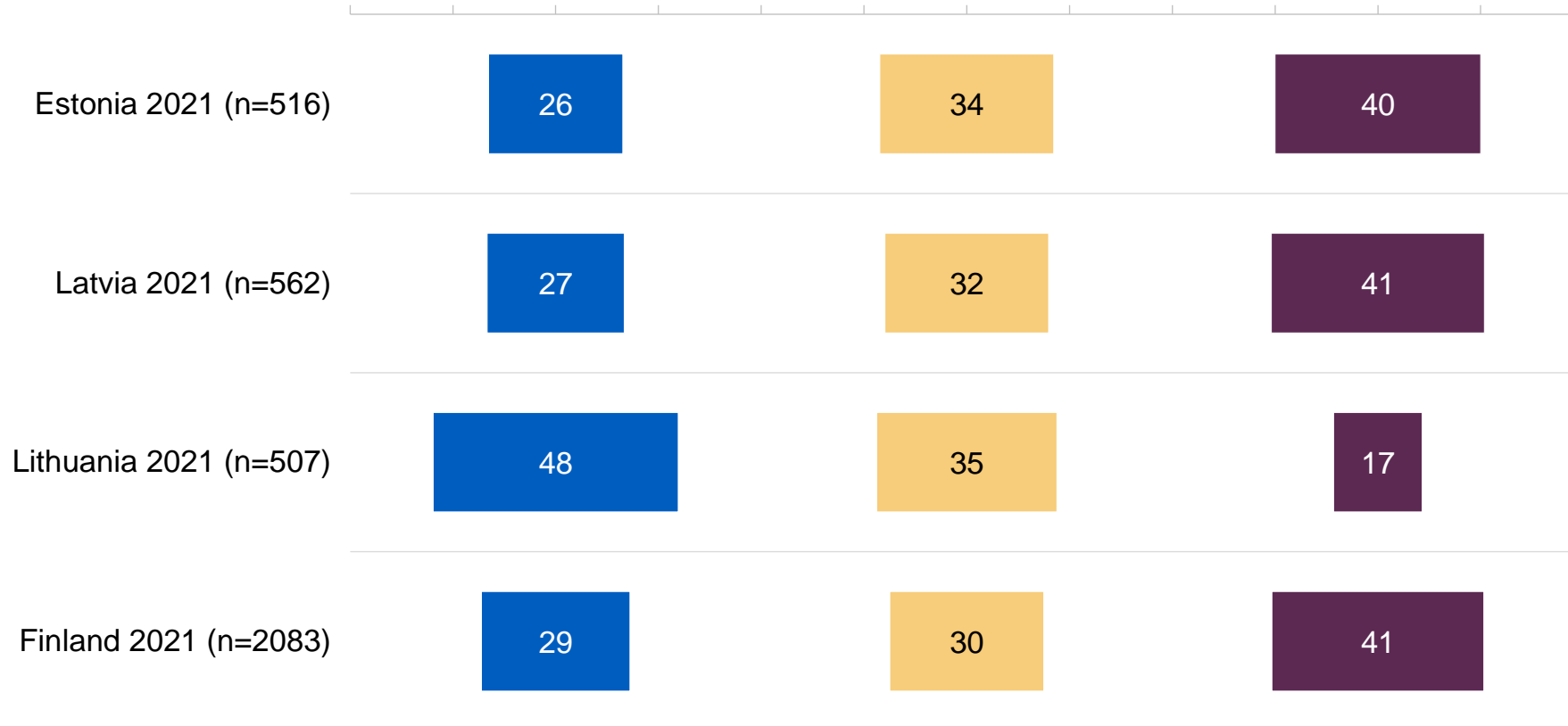
Profiles



Purchases now

■ Emphasis on online stores (6-10) ■ In between (4-5) ■ Strong emphasis on physical stores (1-3)

%

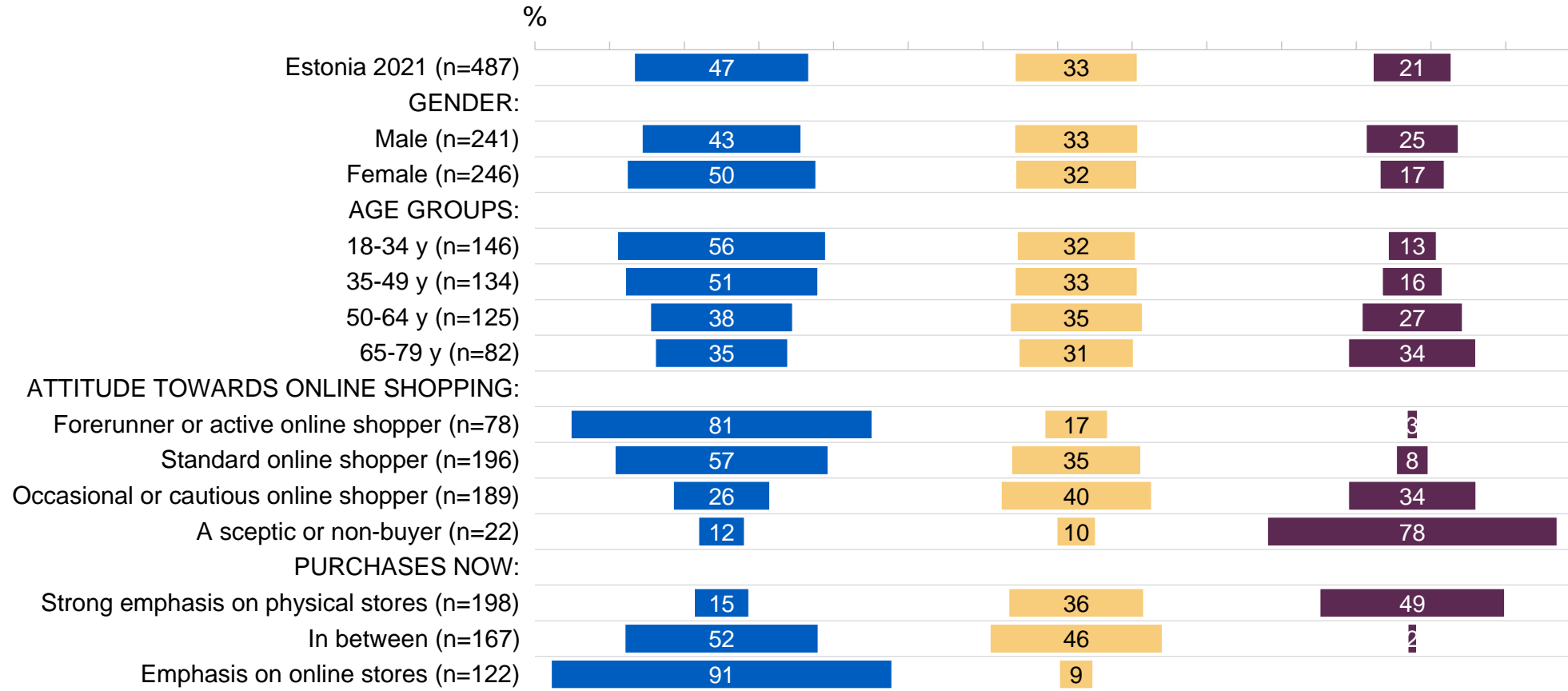


Profiles



Purchases in 2025

■ Emphasis on online stores (6-10) ■ In between (4-5) ■ Strong emphasis on physical stores (1-3)



if n<50 result only indicative

Profiles



Purchases in 2025

■ Emphasis on online stores (6-10) ■ In between (4-5) ■ Strong emphasis on physical stores (1-3)

%

