



ONLINE SHOPPING BAROMETER 2024

DECEMBER 2024

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EXECUTIVE SUMMARY

- **As an expert in Central Europe, CEPER** regularly conducts market research in the countries of the region to gain a comprehensive picture of the functioning, attitudes, preferences and opinions of the countries and societies of Central Europe. This analysis is based on data collected **in the fourth quarter of 2024**, during which a representative sample of 1,000 adults per country was surveyed. The countries participating in the survey are: Austria, Bulgaria, Czech Republic, North Macedonia, Croatia, Poland, Hungary, Montenegro, Romania, Serbia, Slovakia and Slovenia.
- According to a 2024 survey conducted by CEPER in 12 Central European countries, **62 percent of the region's** adult population shop online. The most active nations in retail e-commerce activity are Austria, Poland and the Czech Republic, while online shopping is in its infancy among Montenegrins and Serbs. Nearly two-thirds of the internet shopping community in the Central European region surveyed spends time shopping online at least monthly. The frequency of shopping stands out among Poles, Austrians and the Czech Republic, according to the CEPER survey.
- According to CEPER research, the **most frequently used** delivery method is **home delivery, a practice that is typical for 76 percent of** Central European online shoppers. The **parcel locker** market is strong in the region, used **for 37 percent of online purchases**. While home delivery is more popular than average among Montenegrins, Serbians, Romanians and Austrians, using a parcel locker is the preferred delivery method for Poles, Czechs, Slovaks and Hungarians.
- **Payment by bank card/credit card** among the Central European consumer population **is the most popular** (61 percent), cash payment is used by almost half of those surveyed (45 percent), while bank transfer is typical for 19 percent

of online shoppers. Credit card payments are used above average by Croatians, Czechs, Slovaks and Austrians, while cash account settlement is popular among Serbians and Bulgarians.

INTRODUCTION

The dominant expansion of online shopping and parcel points, as well as the approach of Christmas, prompted us to conduct a comprehensive survey to examine how online shopping activity will develop in Central Europe in the fourth quarter of 2024 and to what extent parcel points represent a real alternative to traditional pickup methods.

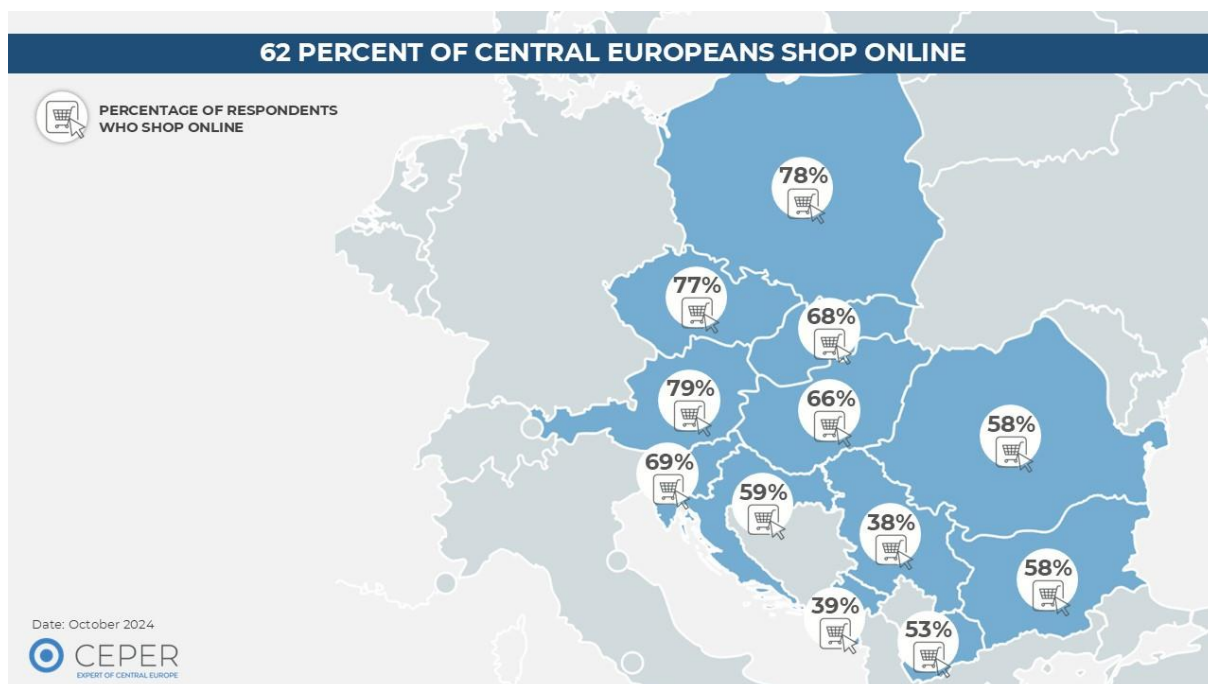
The "Online Shopping Barometer 2024" research also helps to understand which social groups are more active in e-commerce and how digital shopping habits are shaped by demographic characteristics.

The survey also covers the e-commerce habits and preferences of the 12 Central European nations studied, and our goal is to present the patterns emerging within the region.

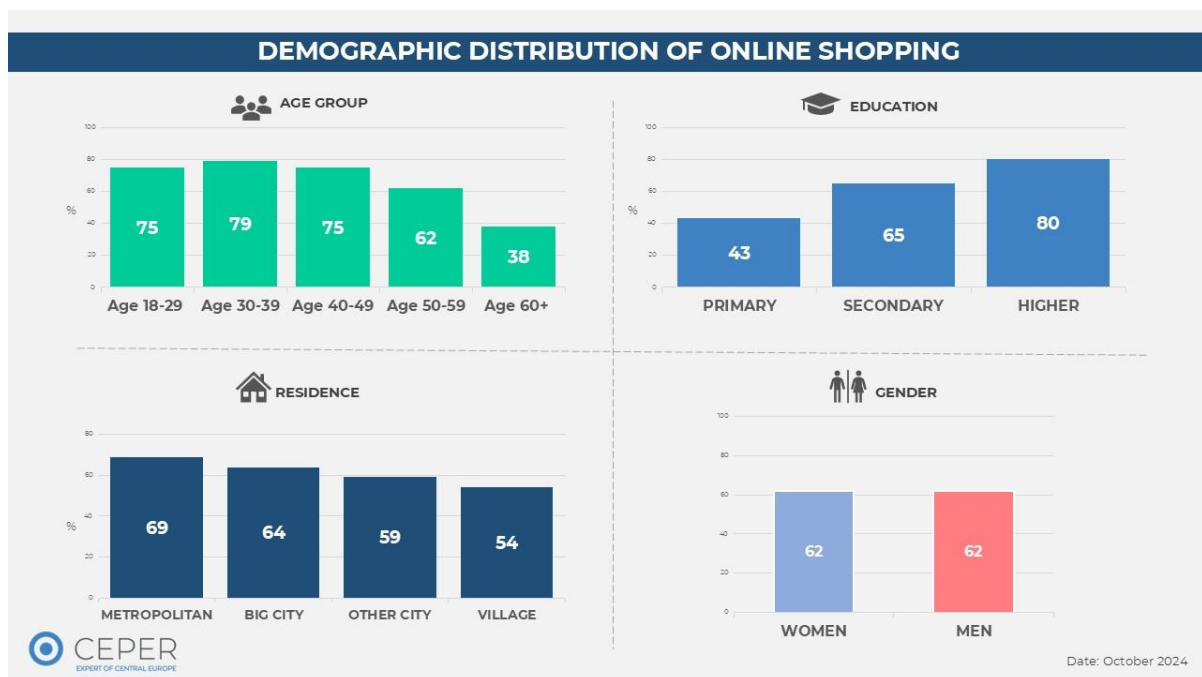
ONLINE SHOPPING BAROMETER 2024 RESULTS

Online shopping in Central Europe

62 percent of the population of the Central European countries surveyed buys products or services online. Of the 12 nations participating in the research, Austrians (79 percent), Poles (78 percent) and Czechs (77 percent) are the ones who are most likely to shop online. The willingness to shop online is higher than the Central European average (62 percent) among Slovenians (69 percent), Slovaks (68 percent) and Hungarians (66 percent). 59 percent of the Croatian adult population, 58 percent of the Bulgarian and Romanian populations, and 53 percent of North Macedonians have engaged in online shopping. In the Central European region, retail e-commerce is in its infancy among Montenegrins and Serbs, with online shopping penetration among the adult population at 39 percent in the former and 38 percent in the latter.



The demographic analysis of the results revealed that the groups most committed to online shopping are those with higher education (80 percent) and those aged 30-39 (79 percent), while those most disengaged from the activity are those aged 60 and older (38 percent) and those with primary education (43 percent). Based on the average of the 12 nations studied, it can be seen that at least three-quarters of the population aged 18-49 participate in e-commerce as end users, the proportion of those aged 50-59 is the same as the average, while only 38 percent of those aged 60 and older do so. Similar to age, education also significantly differentiates the willingness to shop online, with four-fifths of highly educated people engaging in such activities, while only 43 percent of low-educated people deviate from the traditional, offline form of shopping. The presence of women and men in the online marketplace is balanced, and they use it in equal proportions. The more urban profile of online shoppers is reflected in the results, with 69 percent of those living in the capital and 54 percent of those living in villages and towns participating in e-commerce.



Online shopping frequency

64 percent of the online shopping community in Central European countries spends on a product or service on a monthly basis on the World Wide Web. Just as Austrians, Czechs and Poles stand out among the countries in the region in terms of e-commerce activity, shopping is also more frequent among them. Polish online shoppers are the most active in shopping online at least monthly (82 percent), followed by Austrians (79 percent) and Czechs (76 percent). While Montenegrins had one of the lowest levels of online shopping, the number of those who purchase products/services online at least monthly is close to the average (62 percent) among already active users. Although Slovenians show above-average e-commerce activity, the results also highlight that shoppers spend less frequently than average on the internet at least monthly (51 percent). The activity of the Serbian and North Macedonian online shopping segments is below average, with 41 percent of the former and 42 percent of the latter using the opportunities offered by the online marketplace.

Examining the results over a shorter period of time, we find that the top spots remain unchanged, with 30 percent of Polish, 26 percent of Austrian and 26 percent of Czech virtual shoppers spending online on a weekly basis. While monthly shopping among Hungarians is close to average (66 percent), weekly shopping activity (22 percent) is 4 percentage points higher than the Central European average.

Shipping method for online purchases

The research also examined the most common delivery methods for products purchased online. According to the survey results, the most frequently used delivery method is home delivery, a practice typical of 76 percent of Central European online shoppers. The parcel locker market appears to be strong in the region, with 37 percent of online purchases using a parcel locker as the preferred

delivery method. 18 percent of the surveyed customers order the product to a delivery address outside their home, while 14 percent choose to pick it up in a store. Examining the results by country, we find that preferences differ significantly from the average across nations. Home delivery is more popular than average among Montenegrins (93 percent), Serbians (93 percent), Romanians (92 percent) and Austrians (88 percent), while home delivery is a less popular form of delivery among Czechs, Poles and Slovaks. The use of parcel machines is above average among Poles (78 percent), Czechs (64 percent), Slovaks (62 percent) and Hungarians (45 percent), while in North Macedonia only 3 percent of online shoppers and 4 percent in Montenegro use it when ordering. In-store pickup is the most common option among Czechs, where a third of the online shopping community (33 percent) chooses this delivery option.

Overall, it appears that ordering via home delivery is more typical of those aged 60 and older, as well as those living in villages and towns, while the use of parcel points is more prominent among those aged 30-39 and those with higher education.

[Payment methods when shopping online](#)

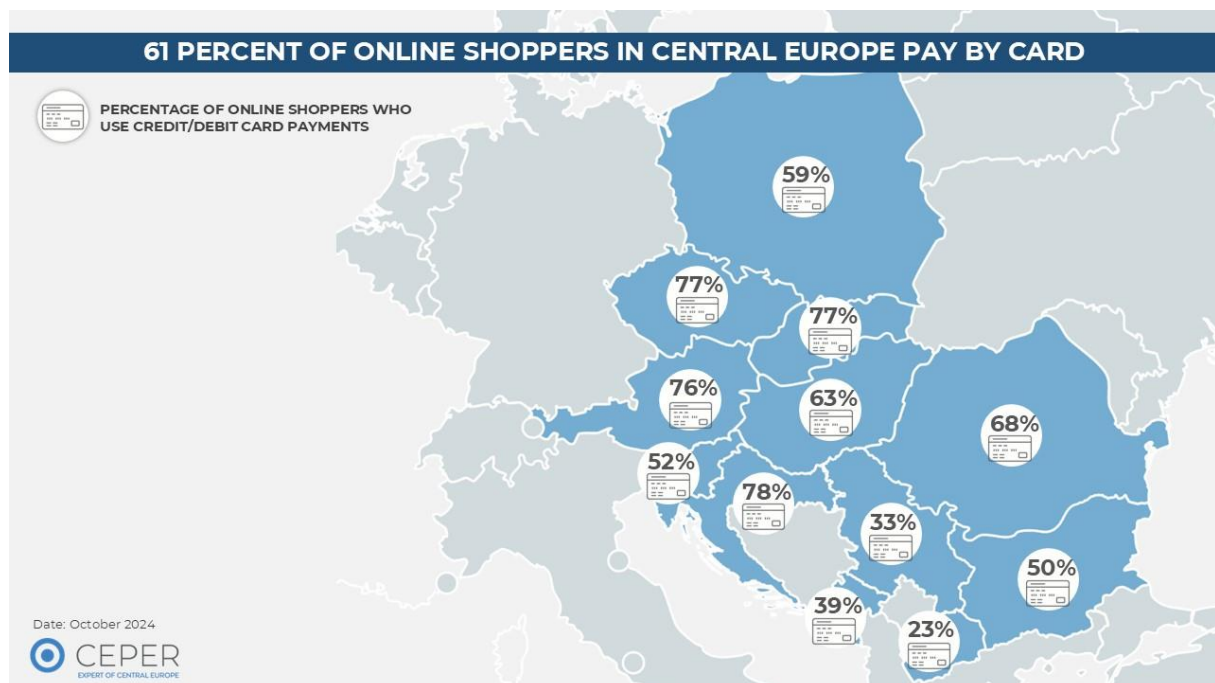
Country-specific patterns also emerged in the preference of payment methods used when shopping online. Among the Central European consumer population, payment by bank card/credit card is the most popular (61 percent), cash payment is used by almost half of those surveyed (45 percent), while bank transfer is typical for 19 percent of online shoppers.

Of the 12 nations surveyed, the card payment solution is preferred by Croatians (78 percent), Czechs (77 percent), Slovaks (77 percent), Austrians (76 percent), and Romanians (68 percent), while 23 percent of North Macedonian, 33 percent of Serbian, and 39 percent of Montenegrin online shoppers use card payments for their e-commerce spending.

Cash payments are most common among Serbians (86 percent), Bulgarians (78 percent), Romanians (73 percent), and Montenegrins (69 percent). Cash use for payments is significantly lower than average among Austrians (9 percent) and Croatians (13 percent).

Bank transfer is an above-average payment method used by Poles (33 percent), Austrians (32 percent) and Czechs (31 percent), while only 2 percent of Romanian e-shoppers pay by bank transfer

The results of the analysis of demographic indicators show that while those with primary education prefer cash payments and are less likely to pay by bank card/credit card, the opposite is true for those with higher education.

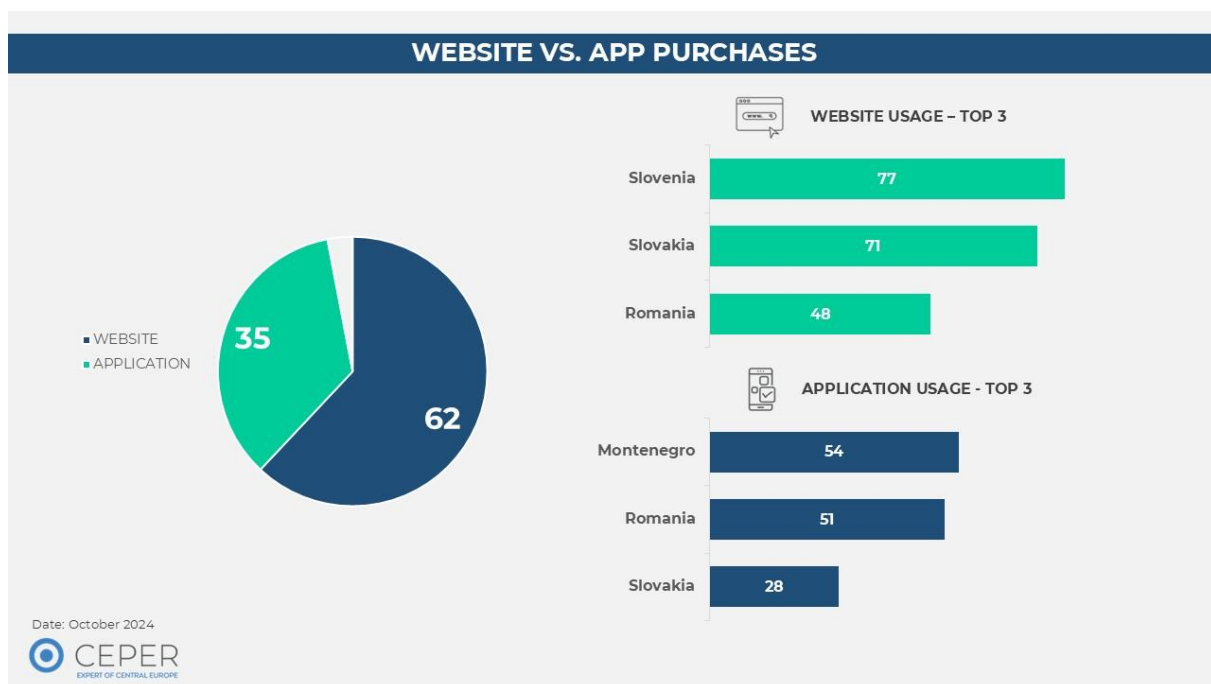


Website vs. app purchases

According to the lessons of the Central European research, shopping via websites still dominates among the target group studied today, with 62 percent of online

purchases being made via websites. 35 percent of the population studied uses applications to make online purchases.

Shopping via the website is above average for Slovenians (77 percent) and Slovaks (71 percent), while Montenegrins (44 percent) and Romanians (48 percent) are less likely to use the classic solution for their online shopping. The nations that are more reluctant to shop via the app are Slovenia (21 percent), Slovakia and North Macedonia (28 percent each), while platform usage for online shopping is above average for Montenegrins (54 percent) and Romanians (51 percent).



SUMMARY

According to the results of the "Online Shopping Barometer 2024", Austrians, Czechs and Poles have the highest participation in retail e-commerce in Central Europe, and the frequency of online shopping among these nations is above average compared to the other nations surveyed. Based on demographic studies,

people aged 30-39, those with higher education and those living in large cities are more inclined to shop online, while older generations and those with low education are less active in this area.

Among the delivery methods, online shoppers insist on home delivery the most, but there is also a significant demand (a third of the population) for the new generation of parcel lockers.

Among the Central European consumer population, paying by bank card/credit card is the most popular method, however, cash payment is still a common practice for nearly half of those surveyed.

In terms of geographical location, the countries of the northern part of the Central European region show a higher openness towards online shopping and electronic payments, and the use of parcel lockers is also more popular than average. In contrast, the southern nations are currently lagging behind in the integration of digital technology, and possible future studies will help to monitor e-commerce trends.

METHODOLOGY

The survey was conducted in 12 countries in the Central European region: Austria, Bulgaria, the Czech Republic, North Macedonia, Croatia, Poland, Hungary, Montenegro, Romania, Serbia, Slovakia and Slovenia . The data collection took place between October 7, 2024 and October 24, 2024. The survey was conducted by telephone, with 1,000 respondents per country (in person in Serbia). The sample is representative in each country by gender, age and type of settlement .

BOARD VOLUMES

Proportion of online shoppers

Country	Item number	Percentage
Full sample	12000	61.8%
AT	1000	78.9%
BG	1000	58.2%
HR	1000	59.0%
CZ	1000	76.6%
MNE	1000	39.0%
NMC	1000	53.4%
PL	1000	78.2%
RO	1000	58.0%
SRB	1000	37.5%
SK	1000	68.3%
SL	1000	69.1%
EN	1000	65.8%

Demographic distribution of online shopping

Demography	Finishes	Not finished
Full sample	61.8%	37.6%
Man	61.7%	37.9%
Woman	62.0%	37.3%
18-29 years old	75.8%	23.3%
30-39 years old	79.0%	20.4%
40-49 years old	75.1%	24.5%
50-59 years old	61.6%	38.1%
60+	37.8%	61.8%
With a basic education	43.4%	56.0%
Secondary education	65.0%	34.5%
Higher education	79.8%	19.9%
Metropolitan	69.4%	30.1%
Living in a big city	64.1%	35.5%
Living in another city	58.5%	32.6%
Village	53.8%	37.3%

Proportion of online shoppers at least monthly

Country	Item number	Percentage
Those who shop online	7416	64.4%

AT	779	79.4%
BG	582	52.8%
HR	590	66.4%
CZ	766	76.1%
MNE	390	61.6%
NMC	534	41.9%
PL	782	82.0%
RO	580	56.7%
SRB	375	40.8%
SK	683	72.5%
SL	691	50.9%
EN	664	65.9%

Use of the shipping method

Country	Item number	Home delivery users	Parcel machine users
Those who shop online	7416	76.1%	36.6%
AT	779	87.7%	19.0%
BG	582	68.9%	27.5%
HR	590	79.0%	27.8%
CZ	766	56.5%	64.2%
MNE	390	92.7%	3.5%
NMC	534	80.5%	2.9%
PL	782	57.4%	77.7%
RO	580	91.6%	40.5%
SRB	375	92.7%	27.9%
SK	683	66.8%	61.6%
SL	691	85.4%	8.0%
EN	664	74.1%	45.4%

Using the payment method

Country	Item number	Bank/credit card users	Cash users
Those who shop online	7416	60.7%	44.6%
AT	779	75.6%	8.6%
BG	582	50.3%	77.7%
HR	590	77.8%	12.8%
CZ	766	77.3%	36.4%

MNE	390	39.5%	68.9%
NMC	534	23.0%	66.2%
PL	782	58.5%	26.2%
RO	580	68.4%	73.4%
SRB	375	33.4%	85.8%
SK	683	77.2%	44.1%
SL	691	52.3%	36.5%
EN	664	63.3%	46.0%

Mobile app vs. website ordering breakdown

Country	Item number	Mobile app users	Website users
Those who shop online	7416	34.8%	62.0%
AT	779	47.1%	50.6%
BG	582	30.6%	67.5%
HR	590	34.2%	63.0%
CZ	766	29.3%	69.6%
MNE	390	54.1%	44.1%
NMC	534	27.5%	57.1%
PL	782	36.5%	59.3%
RO	580	51.2%	48.1%
SRB	375	33.9%	65.6%
SK	683	27.5%	71.3%
SL	691	20.7%	77.4%
EN	664	31.6%	62.8%

